

TRUST SERVICE TRAINING - LEVEL 3

SESSION 8

REVIEW

In this session we learned how to:-

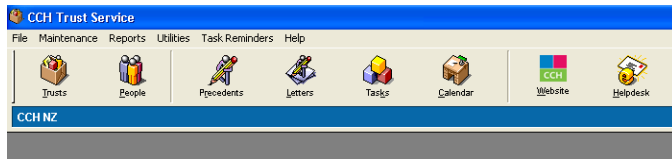
- ⇒ Customise the Standard CCH Trust Service Templates
- ⇒ Create additional Templates
 - Using Standard Bookmarks
 - Using User Defined Bookmarks
- ⇒ Create Letters to Single Person in Trust
- ⇒ Create Letters to Multiple Person in Trust

Action Points/Follow Up

Question	✓	Session Required	Date
Do I have the appropriate access level required to add or change templates (Level 9)?		Discuss internally	
Do we need to review our use of the CCH standard templates?		See Notes Session 2	
Do we need to customize the standard CCH Templates?		Discuss internally	
Do we want to add our letter templates to the Trust Service?		Discuss internally	
Do we want to book a CCH Trainer to complete our template customization for us?		Discuss with CCH	
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	

For further help:

Select Help to access the Trust Service Help Files



Visit WWW.CCH.CO.NZ/TRAINING for training notes on previous sessions, notes are posted approx 7 days prior to the next session. You can access training notes for session you are not attending.

Contact Support 0800 500 224 if your system is not working

Email Krogers@CCH.co.nz if you have any 'how to' questions. Emails are answered 1day per week only, usually on Thursday or Friday