

TRUST SERVICE TRAINING - LEVEL 3

SESSION 9

OVERVIEW

In this session we will learn how to:-

- Customise the Standard CCH Minute Document Template
- Create a Resolutions Document Template
- Customise the Standard CCH Minute Library

Prerequisites for Level 3, Session 9

- The Trust Service Software is Installed at your office
- You have the latest version, 4.2
- You are familiar with the Trust Service Software, adding a Trust, maintaining records, creating documents from Standard Templates & using the Minute Book
- You have a general understanding of the principles of Mailmerge

Preparation for Level 2, Session 9

- Print the Session Notes.
- You may also want to review the note on Using the Minute Book in Session 2 & Creating Templates in Session 8
- Set up Webex Meeting Manager on your PC, ideally the day before the session in case you have any difficulties
- Dial into the Meeting, using the Link & Password provided 5mins prior to start time