

# TRUST SERVICE TRAINING - LEVEL 3

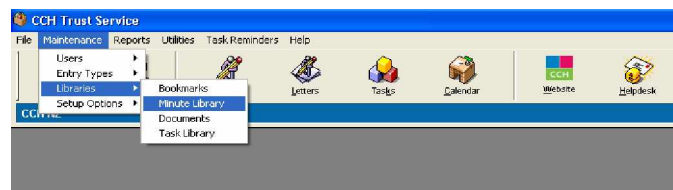
## SESSION 9.3

### CUSTOMIZING THE STANDARD CCH MINUTE LIBRARY

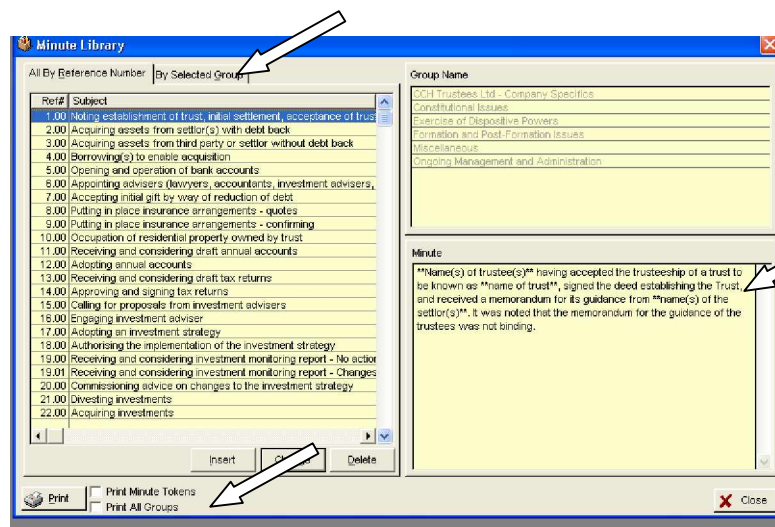
The Trust Service comes with a standard Minute Library containing approximately 70 Minute Templates that can be added to create a Minute Document. You are able to customise this Library. You must have Access Level 9 to complete any Customisation in the Trust Service

Templates are saved in the Minute Library

Select Maintenance, select Libraries and select Minute Library



This is the Minute Library



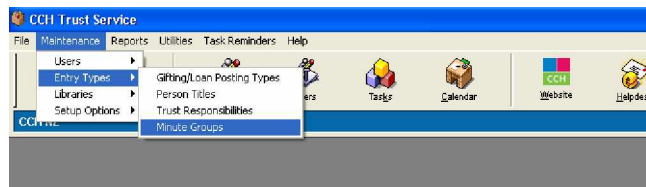
Minutes can be viewed as the full list or by Selected Group. The full Minute template (Highlighted) is shown in the bottom right window

You can print off a full list of these Minutes by checking the 2 boxes and selecting Print

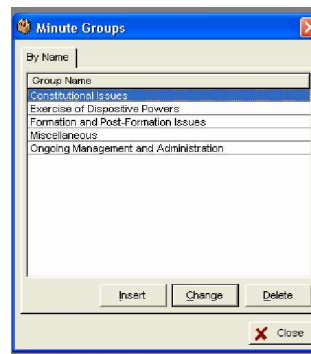
## CUSTOMISATION OF MINUTE LIBRARY

If you are going to create any Minutes of your own you may want to first create a Minute Group to help you identify these later.

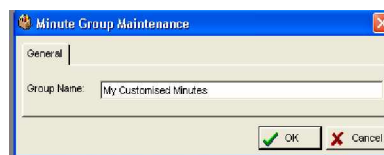
Select Maintenance, Select Entry Types, Select Minute Groups



Select Insert



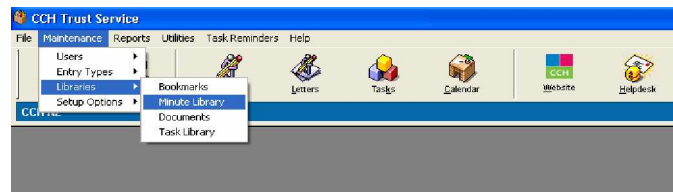
Type the name of your Minute Group



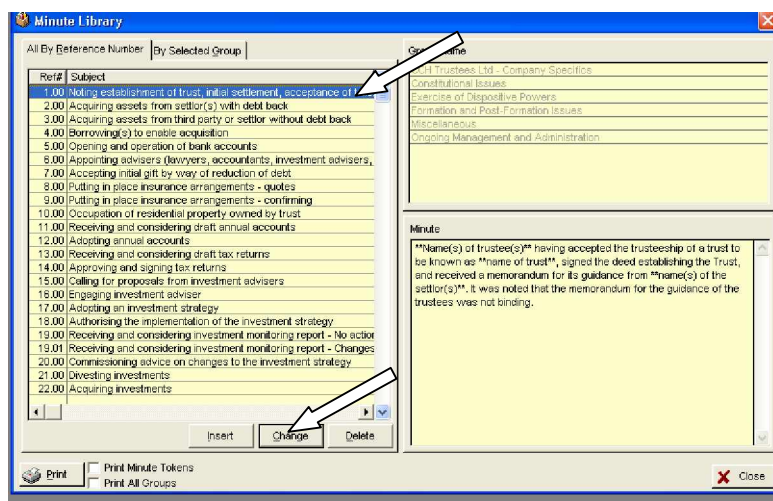
Select OK to Save

## CUSTOMISATION OF EXISTING MINUTES

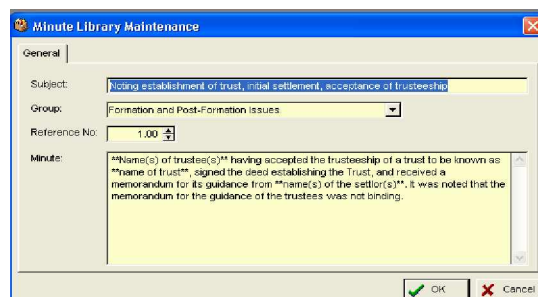
Select Maintenance, select Libraries and select Minute Library



In the Minute Library highlight the Minute you wish to Customise.



Select Change



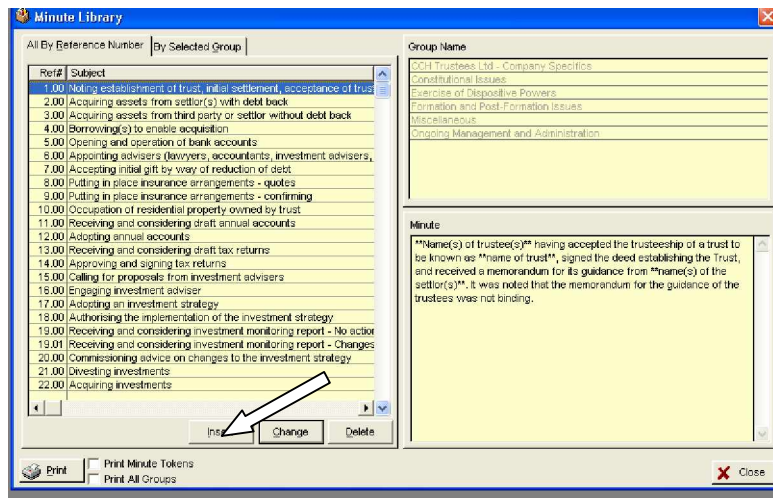
You can now change or add text to this minute template. Your changes will be included each time you create a minute document in the future.

Note: Any text surrounded by **\*\*text\*\*** is a Merge field. If you delete these you will lose the opportunity to pull data into the template when creating a Minute Document

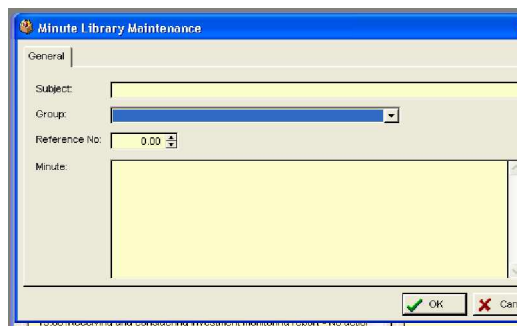
Select OK to Save

## INSERTING A NEW MINUTE

Open the Minute Library



Select Insert



Type the Subject of your Minute

Select the Group it should appear in

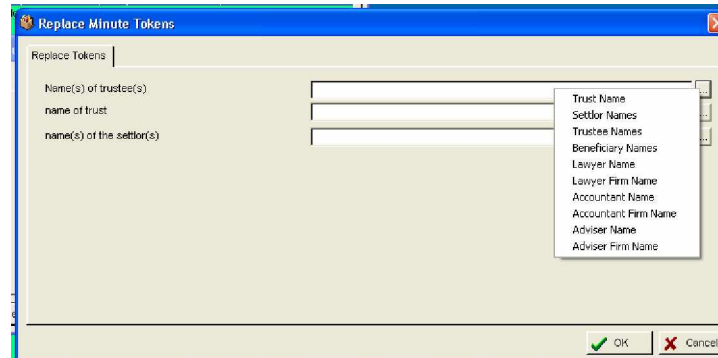
Type a Reference Number - this will determine where it appears in the Minute Library

Type the body of the minute.

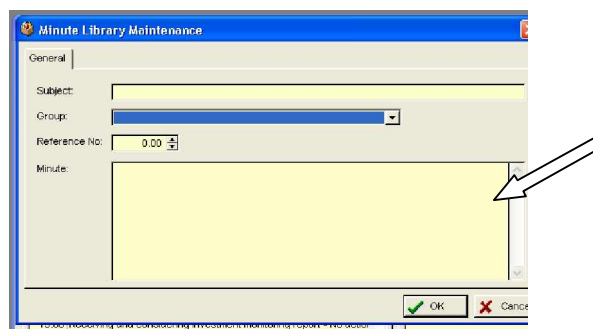
To insert a Merge Field to the Minute

Merge Fields can be used in Minutes to insert any of the information listed below into the body text.

You can also add blank merge field to allow users to type information into the correct location where there is no appropriate information to use on the drop down list



Follow steps above until you arrive at writing the body text of your minute.



Type the Minute and show any area when information is to be inserted with **\*\*TEXT\*\***, for example

**\*\*Name(s) of trustee(s)\*\*** having accepted the trusteeship of a trust to be known as **\*\*name of trust\*\***, signed the deed establishing the Trust, and received a memorandum for its guidance from **\*\*name(s) of the settlor(s)\*\***. It was noted that the memorandum for the guidance of the trustees was not binding.

In this example there will be appropriate information to select from the drop down list.

In the example below, the user will type the date then make the selection from the list for the name of the accounting firm.

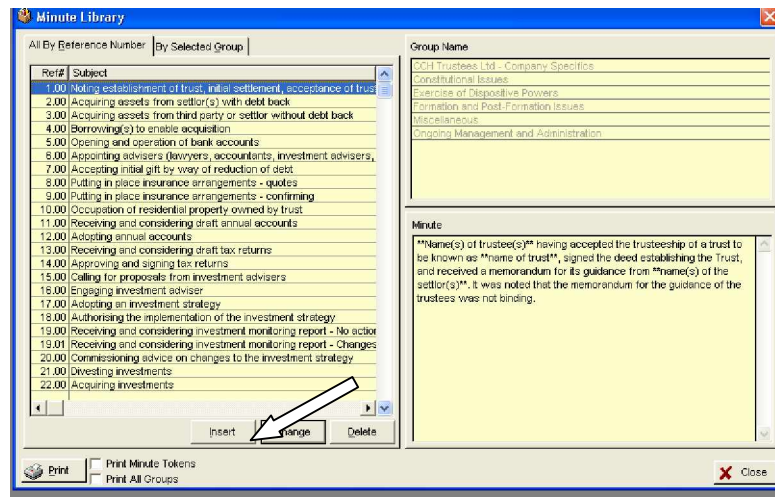
It was resolved to receive and consider the draft annual accounts of the Trust for the year ended **\*\*date of year end\*\*** prepared by **\*\*name of accounting firm\*\***.

Merge fields can be used to insert absolutely any information you require.

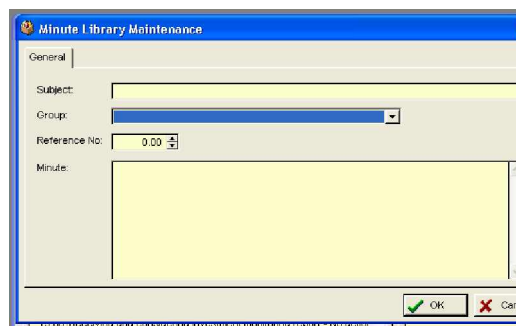
## CREATING A COMBINED MINUTE

Minutes can be combined to save the user time when creating a Minute Document. For example, if you always use Minute 1 - 10 when you set up a new Trust you can create a Formation Minute. The User would then select Formation Minute, rather than having to select 1 - 10 individually.

Open the Minute Library



Select Insert



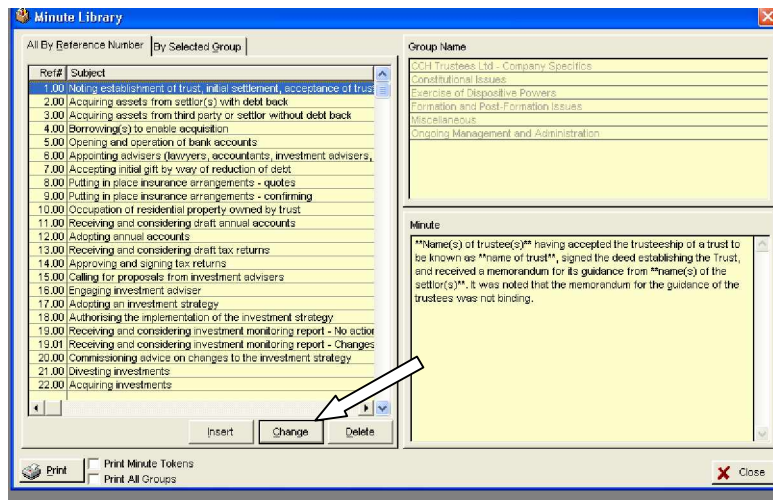
Name your Minute Formation Minute

Add it to your Minute Group

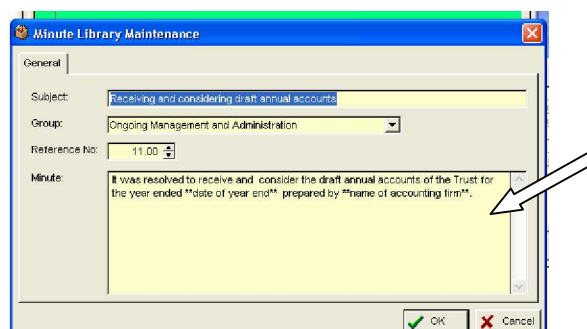
Select OK to Save.

This is now a Blank minute.

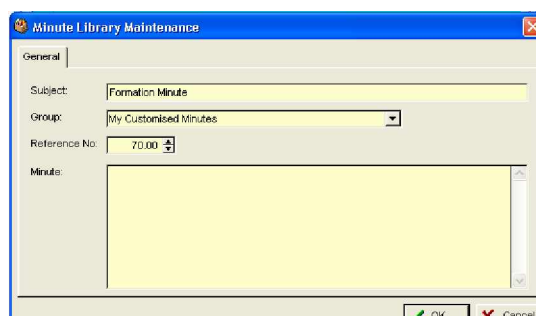
Highlight the first Minute you wish to use, Select Change



Highlight the body text & select Ctrl + C on the Keyboard to copy the text. Close this Minute

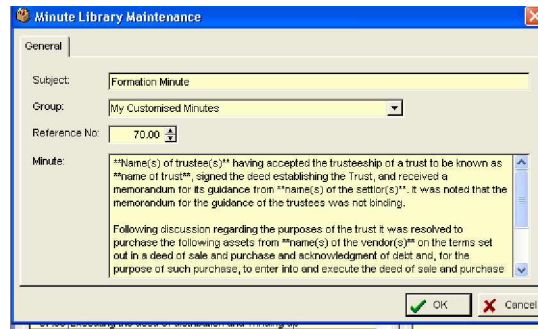


Open your Formation Minute - Highlight & Select Change.



Click into the body text then select Ctrl + V on the Keyboard to paste the copied text in. Save this minute.

Go to select the 2<sup>nd</sup> Minute you want to include in your Formation Minute and repeat the process of copying & pasting.



Repeat until your Formation Minute contains all of the required Minutes.

Select OK to Save

Your combined Formation Minute is now ready to use.