

TRUST SERVICE TRAINING - LEVEL 3

SESSION 9

REVIEW

In this session we learned how to:-

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

Action Points/Follow Up

Question	ü	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 Minutes in the Trust Service		See Notes Session 2	
Do we need to create a Resolutions Template?		Discuss internally	
Do we need to customize any of the CCH Minutes?		Discuss internally	
Do we need to add any further Minutes to the Minute Library		Discuss internally	
Do we need to create any Combined Minutes		Discuss internally	
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