CCH
a Wolters Kluwer business

SESSION 7.4 **LEVEL 2**

System Setup including Trust Types, Trust Status, Trust Categories, System Defaults & User Defined Fields

In this session we learned how to:-

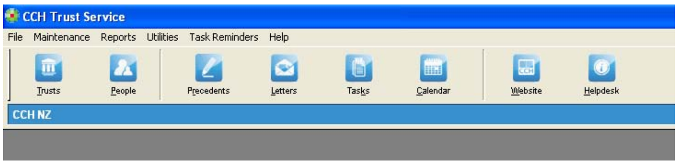
- Set up, maintain & use Trust Types
- Set up, maintain & use Trust Status
- Set up, maintain & use Trust Categories
- Rename Trust Status and Trust Category
- Set up additional Titles
- Set up Asset & Revenue Groups
- Set System Defaults
- Set up, maintain & use Trust User Defined Fields
- Set up, maintain & use People User Defined Fields

Action Points/Follow Up

Question	✓	Session Required	Date
Do I have the correct access levels required to make changes to the system set up (Level 9)		Discuss internally	
Do we need any additional Trust Types?		Discuss internally	
Do we need any additional Trust Status'?		Discuss internally	
Do we need any additional Trust Categories		Discuss internally	
Do we want to rename Status or Category to use it for another purpose?		Discuss internally	
Do we need to delete any blank options (in Types or Categories) to ensure correct data entry?		Discuss internally	
Do we need to set the Defaults?		Discuss internally	
Do we need any additional Titles?		Discuss internally	
Do we need any additional User Defined Fields		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 for training notes on previous session, notes are posted approx 7 days prior to the next session. You can access training notes for session you are not attending.

Contact Tech Support 0800 500 224 for technical issues

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