

SESSION 9.0

LEVEL 3

OVERVIEW

In this session we will learn how to:-

- ⇒ Create Letters and work with Address Options
- ⇒ Customise the Standard CCH Minute 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, 4.3
- ⇒ 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