

SESSION 9.5

LEVEL 3

REVIEW

In this session we learned how to:-

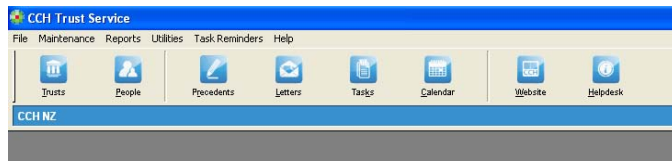
- ⇒ Customise Letters
- ⇒ Work with different address types
- ⇒ Customise the Standard CCH Minute Document Template
- ⇒ Create a Resolutions Document Template
- ⇒ Customise the Standard CCH Minute Library

Action Points/Follow Up

Question	✓	Session Required	Date
Are we going to produce letters via TMS?		Discuss Internally	
What address type are we going to use.		Discuss Internally	
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 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 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