

# TRUST SERVICE TRAINING - LEVEL 3

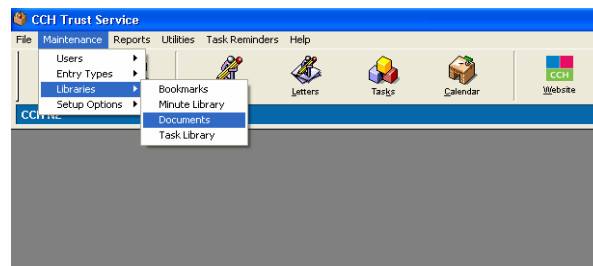
## SESSION 8.2

### CUSTOMIZING STANDARD CCH DOCUMENT TEMPLATES

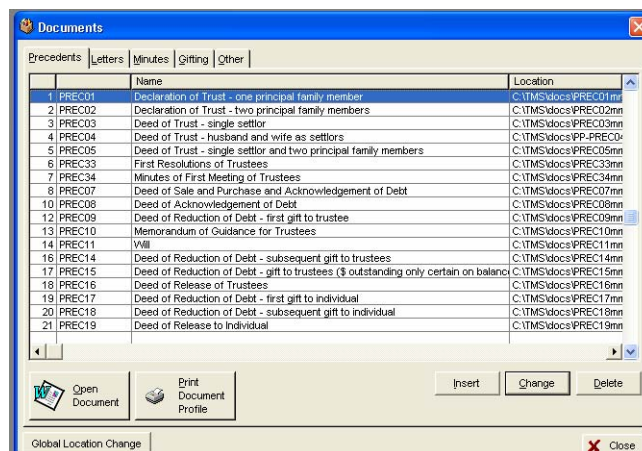
The Trust Service comes with a standard set of document templates. You are able to customise both the layout and the content of the templates

Templates are saved in the Document Library

Select Maintenance, select Libraries and select Documents



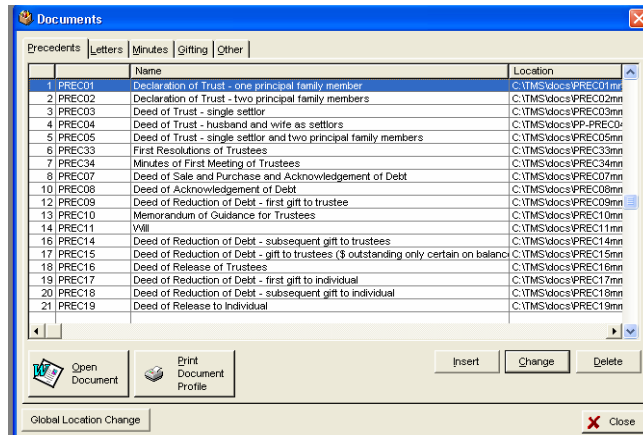
This is the Document Library



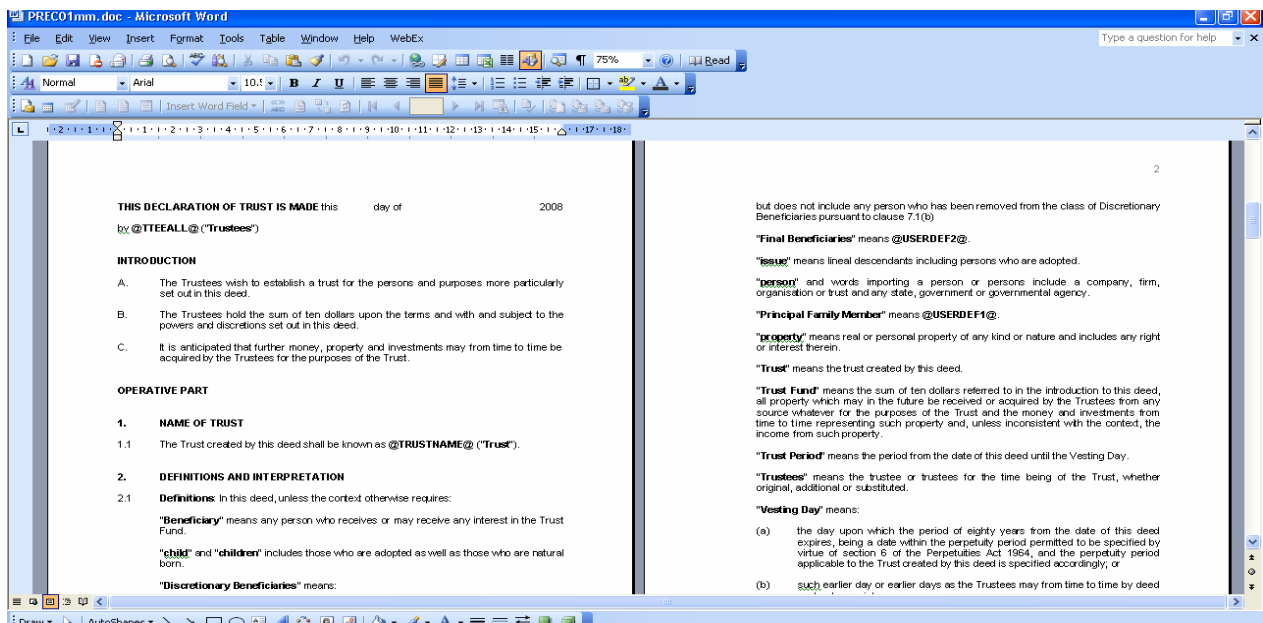
Notes: See attached list of Standard Templates. If your database does not contain all of the Standard Templates or you would like to restore all Templates to their Standard state please contact Support

## CUSTOMISATION

Highlight the Document you want to customise, select Open Document



This Opens the Template in Word



You can now customise this template as required.

Note: any text shown as @TEXT@ is a **Bookmark** (merge field). This is where information is inserted from the database. If you remove this text you remove the opportunity to insert information.

Tip: You may want to take legal advice before making any major changes to the content of the templates.

Save the changes to the document in Word and Close.

The Template is now updated

Note: If you make an error and want to restore the template to its original format you can contact Support for assistance

Note: You may need to update the 'Style File' to complete your customisation. See notes on Style Files.

#### **CUSTOMISED DOCUMENTS & UPGRADES**

All Standard Templates are overwritten during the Upgrade process to ensure that you have the most up to date information based on the latest legislation.

You may want to keep a copy of your customised documents away from the TMS folder so that these can be copied back in after the Upgrade if required. You will need to check the content of each document before you do so in case any important changes have been made. You will also find information in the release notes on which documents have been updated.