SESSION 1.6 **LEVEL 1**

Adding Trusts, Adding People & Companies and Assigning Trust Roles

In this session we learned how to:-

- Add a New Trust
- Add a New Person Record
- Add a New Company Record
- Link People & Companies to the Trust Record
- Assign Roles to People & Companies within the Trust Record
- Maintain Trust, People & Company Records

Action Points

Question	✓	Session Required	Date
Do I need to add or amend any Trust Types?		Session 6	
Do I need to add or amend any Trust Status's?		Session 6	
Do I need to add or amend any Trust Categories?		Session 6	
Do I need to add or amend any Managers?		Session 5	
Do I need to use the Trust Group feature (Advanced Security)?		Session 5	
Do I need any additional fields in the Trust Service to record information that there is not already a space for?		Session 6	
Do I need to amend any of the field names in the Legal Summary?		Session 6	
Do I need to use the 'Responsibilities' function?		Session 5	
Do I need to agree a policy for the use of File Location, Fees Charged & references?		Internal discussion	
Do I want to import information from Lawbase or MYOB?		Discuss with CCH	
Do I need to capture any additional information on the people record?		Session 6	
Do I need to review & tidy up any of my data?		Internal discussion	
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