

Creating Standard Documents & Minutes and Using the Document Register

In this session we will learn how to:-

- Create documents from the CCH Templates using the Precedent Wizard
- Create documents from the CCH Templates using the Letter Wizard
- Understand & Use the Document Register
- Create a Page in the Minute Book
- Add minutes from the CCH Templates to the Minute Book
- Create a Minute Document using the Minute Wizard

Prerequisites for Session 2

- The Trust Service Software is Installed at your office
- You have the latest version, 4.3
- You are comfortable using a PC, Windows Software and have used the Trust Service or seen it demonstrated
- You have at least 1 Trust entered onto your database

Preparation for Session 2

- Print the Session Notes
- 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