

## Tasks & Calendars

In this session we will learn how to:-

- Add a Task to the Task List
- Add a Task to the Calendar
- Add a Task using the Task Library
- Set up Tasks Templates in the Task library
- Complete & Delete a Task
- View the Task List & Calendar (Single Trust or All Trusts)
- Print the Task Report

### Prerequisites for Session 4

- 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 previously
- You have at least 1 Trust entered onto your database

### Preparation for Session 4

- 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