

# SESSION 5.4

# LEVEL 1

## REPORTING

The Trust Service comes with a set of Set Up Reports

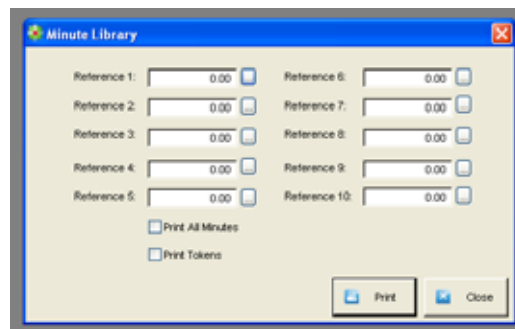
### Set Up Reports

The Set Up Reports contain information about your system setup. Select Reports > Set Up

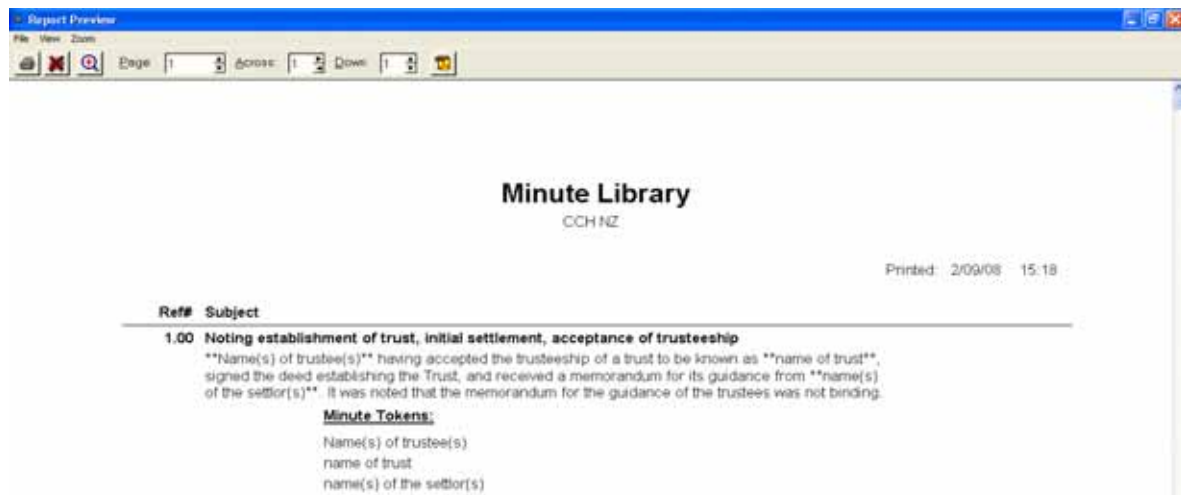


### Minute Library

Prints selected Minutes or All Minutes from the Library of Minute Templates. See notes on Session 2 for more details on Minutes



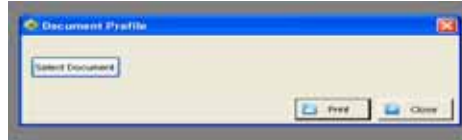
Select individual Minutes to be printed by typing the number or using the square search box  
 Select Print All Minutes & Print Tokens to Print All



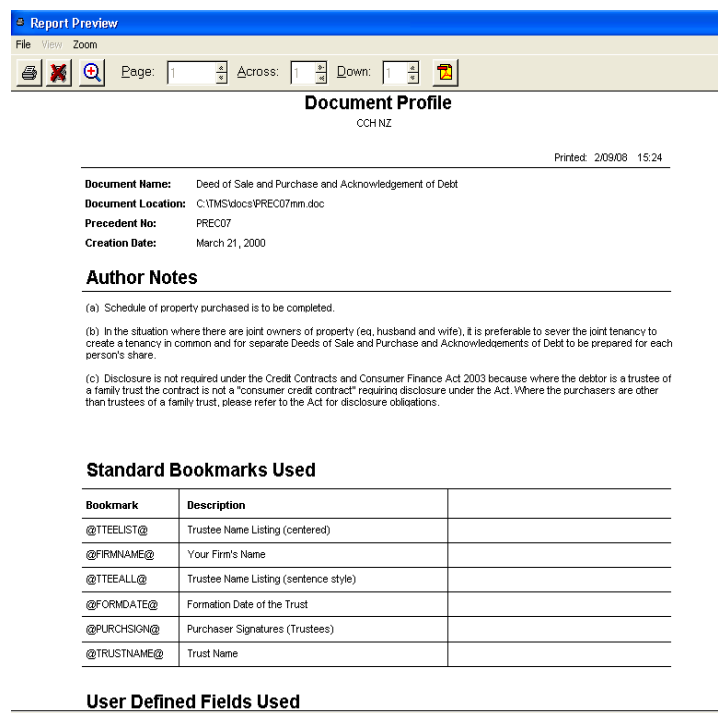
## Document Profile

Prints the Profile of the Document Templates in the Document Library. See notes on Session 2 & Session 8 for more information on Document Templates

Select Reports > Setup > Document Profile



Select the Document Template you are interested in.



**Report Preview**

File View Zoom

Page: 1 Across: 1 Down: 1

**Document Profile**  
CCH NZ

Printed: 20/08 15:24

**Document Name:** Deed of Sale and Purchase and Acknowledgement of Debt  
**Document Location:** C:\TMS\docs\PREC07mm.doc  
**Precedent No:** PREC07  
**Creation Date:** March 21, 2000

**Author Notes**

(a) Schedule of property purchased is to be completed.

(b) In the situation where there are joint owners of property (eg, husband and wife), it is preferable to sever the joint tenancy to create a tenancy in common and for separate Deeds of Sale and Purchase and Acknowledgements of Debt to be prepared for each person's share.



(c) Disclosure is not required under the Credit Contracts and Consumer Finance Act 2003 because where the debtor is a trustee of a family trust the contract is not a "consumer credit contract" requiring disclosure under the Act. Where the purchasers are other than trustees of a family trust, please refer to the Act for disclosure obligations.

**Standard Bookmarks Used**

Bookmark	Description
@TTEELUST@	Trustee Name Listing (centered)
@FIRMNAME@	Your Firm's Name
@TTEEALL@	Trustee Name Listing (sentence style)
@FORMDATE@	Formation Date of the Trust
@PURCHSIGN@	Purchaser Signatures (Trustees)
@TRUSTNAME@	Trust Name

**User Defined Fields Used**

The report includes an explanation of the use of the document & details of the information that will be brought in from the Trust Service database.

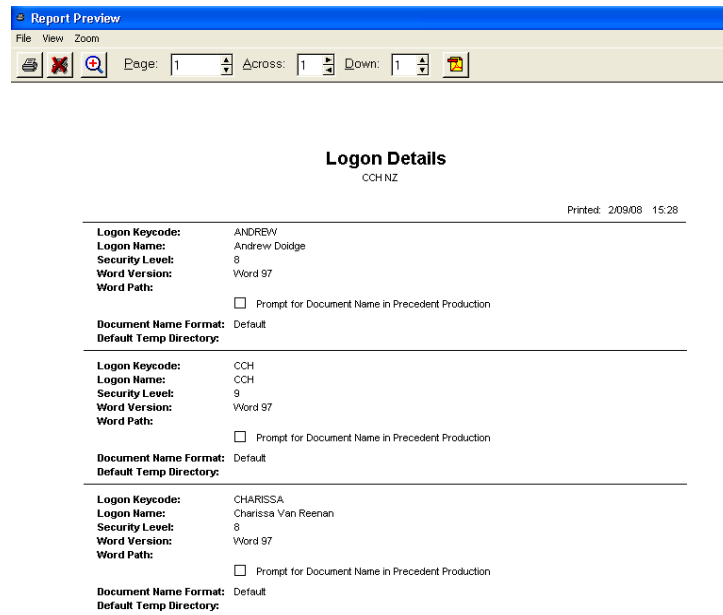
You can send the report to the printer  or save it as a PDF  which can then be attached to an email.

You can use the Document Profiles and Minute Report as dictation guides for your Partners to use.

## Logon Details



Prints the Logon details for your Users

Select Reports > Setup > Logon Details



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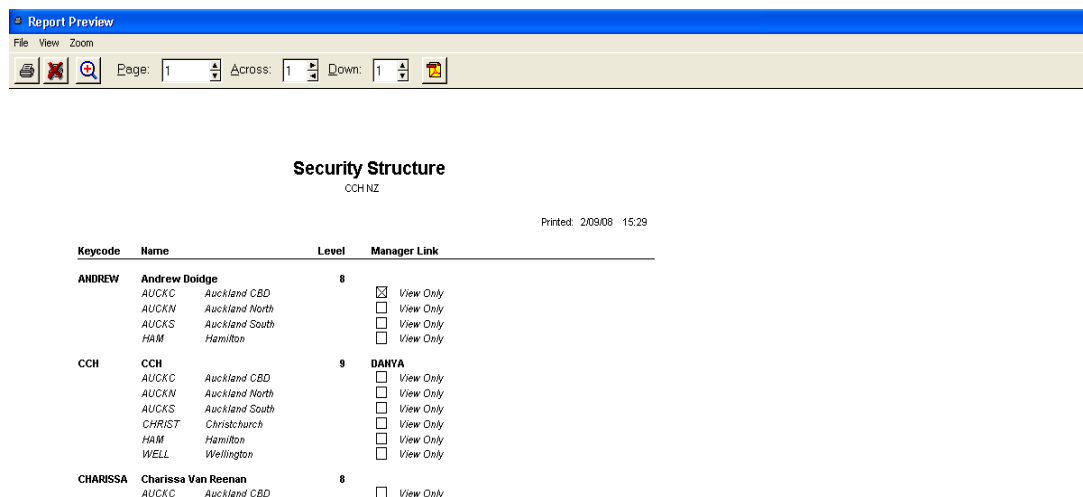
<b>Logon Keycode:</b>	ANDREW
<b>Logon Name:</b>	Andrew Doidge
<b>Security Level:</b>	8
<b>Word Version:</b>	Word 97
<b>Word Path:</b>	<input type="checkbox"/> Prompt for Document Name in Precedent Production
<b>Document Name Format:</b>	Default
<b>Default Temp Directory:</b>	
<b>Logon Keycode:</b>	CCH
<b>Logon Name:</b>	CCH
<b>Security Level:</b>	9
<b>Word Version:</b>	Word 97
<b>Word Path:</b>	<input type="checkbox"/> Prompt for Document Name in Precedent Production
<b>Document Name Format:</b>	Default
<b>Default Temp Directory:</b>	
<b>Logon Keycode:</b>	CHARISSA
<b>Logon Name:</b>	Charissa Van Reenan
<b>Security Level:</b>	8
<b>Word Version:</b>	Word 97
<b>Word Path:</b>	<input type="checkbox"/> Prompt for Document Name in Precedent Production
<b>Document Name Format:</b>	Default
<b>Default Temp Directory:</b>	

You can send the report to the printer  or save it as a PDF  which can then be attached to an email.

## Security Structure



Shows the Access Levels & Trust Groups for each User. See notes on Session 5 for more details on System Security

Select Reports > Setup > Security Structure



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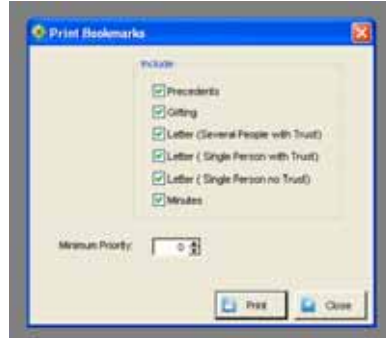
Keycode	Name	Level	Manager Link
ANDREW	Andrew Doidge	8	
	AUCKC Auckland CBD		<input checked="" type="checkbox"/> View Only
	AUCKN Auckland North		<input type="checkbox"/> View Only
	AUCKS Auckland South		<input type="checkbox"/> View Only
	HAM Hamilton		<input type="checkbox"/> View Only
CCH	CCH	9	DAHYA
	AUCKC Auckland CBD		<input type="checkbox"/> View Only
	AUCKN Auckland North		<input type="checkbox"/> View Only
	AUCKS Auckland South		<input type="checkbox"/> View Only
	CHRIST Christchurch		<input type="checkbox"/> View Only
	HAM Hamilton		<input type="checkbox"/> View Only
	WELL Wellington		<input type="checkbox"/> View Only
CHARISSA	Charissa Van Reenan	8	
	AUCKC Auckland CBD		<input type="checkbox"/> View Only

You can send the report to the printer  or save it as a PDF  which can then be attached to an email.

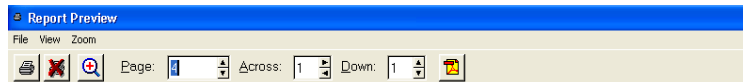
## Bookmark Report

A full list of all the Bookmarks (mail merge fields) that can be inserted into document templates. See notes on Session 8 for more information on creating & customising Document Templates

Select Reports > Setup > Bookmarks



Tick all boxes for a full list





### Bookmarks

CCH NZ

Printed: 2/09/08 15:30

Bookmark	Description	Style	Priority
@CLIENT1PHONE@	Client 1 Phone Number		1
@CLIENT2ADD1@	Client 2 Address Line 1		1
@CLIENT2ADD2@	Client 2 Address Line 2		1
@CLIENT2ADD3@	Client 2 Address Line 3		1
@CLIENT2ADD4@	Client 2 Address Line 4		1
@CLIENT2DOB@	Client 2 Date of Birth		1
@CLIENT2FNAME@	Client 2 First Name		1
@CLIENT2FULL@	Client 2 Full Name		1
@CLIENT2LNAME@	Client 2 Last Name		1
@CLIENT2NUM@	Client 2 Number		1
@CLIENT2OCC@	Client 2 Occupation		1
@CLIENT2PHONE@	Client 2 Phone Number		1
@CLIENT3ADD1@	Client 3 Address Line 1		1
@CLIENT3ADD2@	Client 3 Address Line 2		1
@CLIENT3ADD3@	Client 3 Address Line 3		1
@CLIENT3ADD4@	Client 3 Address Line 4		1
@CLIENT3DOB@	Client 3 Date of Birth		1
@CLIENT3FNAME@	Client 3 First Name		1
@CLIENT3FULL@	Client 3 Full Name		1
@CLIENT3LNAME@	Client 3 Last Name		1
@CLIENT3NUM@	Client 3 Number		1
@CLIENT3OCC@	Client 3 Occupation		1
@CLIENT3PHONE@	Client 3 Phone Number		1
@CLIENT4ADD1@	Client 4 Address Line 1		1
@CLIENT4ADD2@	Client 4 Address Line 2		1
@CLIENT4ADD3@	Client 4 Address Line 3		1
@CLIENT4ADD4@	Client 4 Address Line 4		1
@CLIENT4DOB@	Client 4 Date of Birth		1
@CLIENT4FNAME@	Client 4 First Name		1

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