











## **Customisation to dropdown menus in CCH Entities Trusts**

This guide will help you to understand how you can make you dropdown menus work for your firm's requirements.

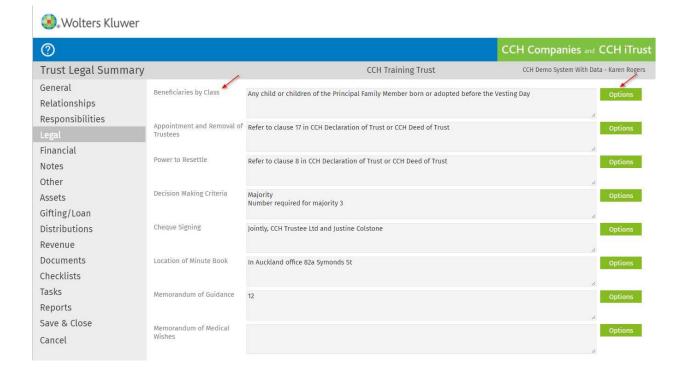
To make changes you need to be setup the system as an Administrator for your logon.

New trust types, status and categories can be added to the dropdown lists you see in the general screen. These can be used for reports and filtering.

Trust groups can be used for reporting and to control access to specific trusts

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Trust General In	nformation		CCH	Training Trust		CCH Demo System	With Data - Karen Rogers	
Relationships	Trust Name	CCH Training Trust			🗐 Inactive T	rust?		
	in our manufa	the state of the s						
Responsibilities	Trust Type	Trading Trust	*					
Legal		2010410005						
Financial	Formation Date	28/01/1986 31						
Notes	Vesting Date	01/06/2088 31 Eve	ent					
Other		and the second sec						
	Trust Status	Active						
Assets	Trust Category	Gifting		Report and	filter trusts by			
Gifting/Loan	must category	undig			egory or Manage	r.		
Distributions	Manager	Doris Upton						
Revenue			_		filter on Trust Gro			
Documents	Trust Group	Auckland North	•	control acce	ss to specific trus			
Checklists								
	- Holders Marter							
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Rename any of the fields on the Legal screen and set up your own Options for quick, easy and consistent completion of information.



## Add your own responsibilities to this list.

🕘 Wolte	rs Kluwer		
0	Trust Responsi	bility	0
Trust Resp	Date	26/06/2017 31,	
Save & Close	Responsibility	Please Select	
Cancel	Party Responsible Others Responsible	Please Select     Annual review of trust     Call annual meeting of trustees     Creation & maintenance of trust deeds     Deed signature (Client)     Gifting management     Manage beneficiary information requests     Minute Book holder     Property management     Share trust legal documents with accountant     Trust accounts/financial statements     Trustee company annual return     Will holder	J.
	Notes		
	Termination Date	31_	<i>I</i> ,
			Save Cancel

Add your own Task templates to this list (new task 'Options') for quick, easy and consistent loading of tasks.

Trust Ta	ask		
Date	26/06/2017 <u>31</u>	Task Library Selection	
Manager Notes	Doris Upton	Task     AML document review     Annual accounts     Annual Meeting     Annual Review     Annual Review     Annual review of Trust     Chase signatures on documents - [insert name here]     Consider Trustee competency after age 55yrs - [Nam     Gifting due     Gifting review     Minutes of annual meeting to be distributed     Needs IRD Number     Rent review	Options
	Task recurrence	Select Cancel	Save Cancel

The Other tab allows you to set up multiple customized fields to contain any additional data you want to record.

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0					CCH Companies and CCH iTrust
Trust Other				CCH Training Trust	CCH Demo System With Data - Karen Rogers
General					
Relationships	Car Registation	ABC 123			
Responsibilities	Favorite Colour	Red	•		
Legal					
Financial					
Notes					
Other					
Assets					
Gifting/Loan					
Distributions					
Revenue					
Documents					
Checklists					
Tasks					
Reports					
Save & Close					
Cancel					

In addition to customising the way the database is set up, you can add any of your own content, for example, letters, minutes and forms, and link these to the data for quick and easy document production.

You can also customize the existing content to match your corporate branding by adding logos or changing the font of documents.

ashboard Reports Setup	About Logout		CCH Companies and CCH iTrus
etup	CCH Demo System With Data - Karen Rogers		
Users	Templates	Entry Types	Setup
Logins Managers Personal Setup	Company Checksheets Company Master Templates Company Task Templates Master Templates Minute Templates Task Templates Trust Checksheets	Gifting/Loan Posting Groups Gifting/Loan Posting Types Minute Groups Person Titles Trust Responsibilities	AML Documents Banks Company Setup Company Types Dynamic Company Data Dynamic Legal Data Dynamic Person Data Required Company Data Required Company Data Required Person Data Required Person Data Share Classes System Setup Trust Categories Trust Groups Trust Status Trust Status

If you need help with customisation and adding content, you can sign up for our monthly training session.

https://www.wolterskluwer.co.nz/cch-itrust-resources/