Wolters Kluwer

CCH Entities

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

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.

Add your own Task templates to this list (new task 'Options') for quick, easy and consistent loading of tasks.
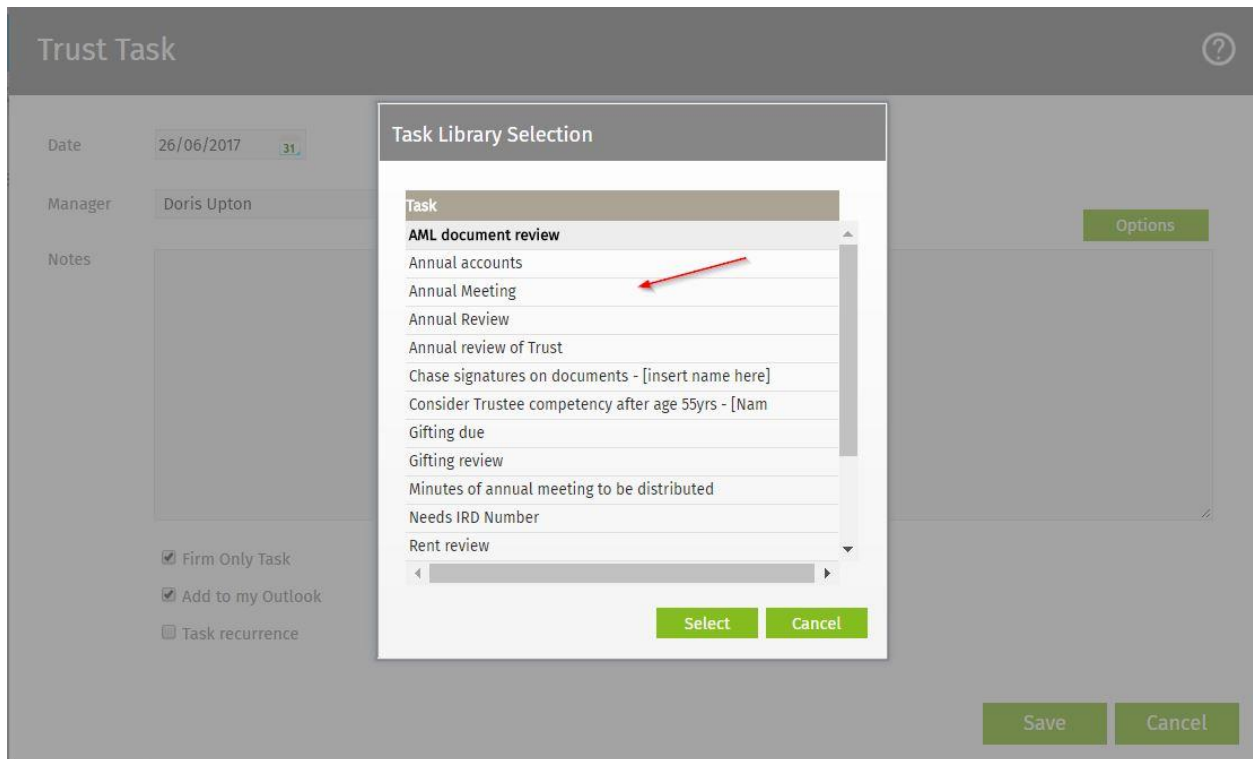
The Other tab allows you to set up multiple customized fields to contain any additional data you want to record.
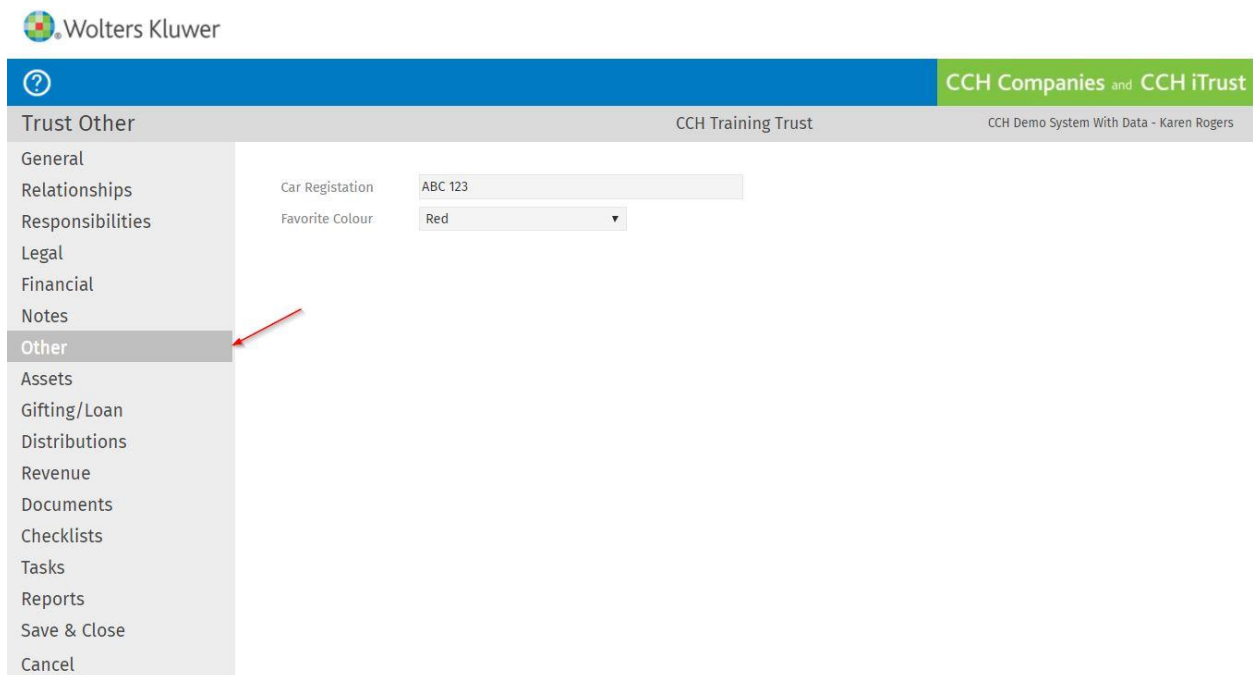
In addition to customising the way the database is set up, you can add any of your own content, for example, letters, minutes and forms, and link these to the data for quick and easy document production.

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

Users

Logins
Managers
Personal Setup

Templates

Company Checksheets
Company Master Templates
Company Task Templates
Master Templates
Minute Templates
Task Templates
Trust Checksheets

Entry Types

Gifting/Loan Posting Groups
Gifting/Loan Posting Types
Minute Groups
Person Titles
Trust Responsibilities

Setup

AML Documents
Banks
Company Setup
Company Types
Dynamic Company Data
Dynamic Legal Data
Dynamic Person Data
Dynamic Trust Data
Required Company Data
Required Person Data
Required Trust Data
Share Classes
System Setup
Trust Categories
Trust Groups
Trust Status
Trust Types

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/