

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

The screenshot displays the 'Trust General Information' form for 'CCH Training Trust' and a 'Trust Listing' table. The form includes dropdown menus for Trust Type, Trust Status, Trust Category, and Trust Group. The listing table shows columns for Trust No, Trust Name, Status, Manager, Type, Category, and Group. A sidebar on the left contains search and filter options for trusts, managers, statuses, types, groups, and categories.

Trust General Information

Trust Name: CCH Training Trust Inactive Trust?

Trust Type: Trading Trust

Formation Date: 28/01/1986

Vesting Date: 01/06/2088

Trust Status: Active

Trust Category: Gifting

Manager: Doris Upton

Trust Group: Auckland North

Trust Listing (33)

Trust No	Trust Name	Status	Manager	Type	Category	Group
2	McIntyre Training Trust	Archived	Claire Roper	Family Trust	Gifting	Auckland Central
3	CCH Training Trust	Active	Doris Upton	Trading Trust	Gifting	Auckland North
4	Freeman Family Trust	Active	Doris Upton	Family Trust	Gifting	Auckland Central
6	Pereira Family Trust	Passive	Gus Hatton	Family Trust	Gifting Complete	Hamilton
7	Rochdale Family Trust	File	Gus Hatton	Family Trust	Gifting Complete	Private
8	Tulloch Family Trust	Active	Claire Roper	Family Trust	Gifting Complete	Wellington
9	Cooper Family Trust	Active	Suzy Taylor	Family Trust	Gifting	London
11	Jones Family Trust	Active	Suzy Taylor	Family Trust	Gifting	Auckland Central
12	Masters Family Trust	Active	Suzy Taylor	Will Trust	Gifting	Auckland North
21	Happy Days Trust	Active	Jenny Dawn Davies	Family Trust	Gifting	Auckland Central
22	Take That Trust	Active	Bob Brown	Family Trust	Gifting	Private
23	Rogers Family Trust	Active	Bob Brown	Family Trust	Gifting	Auckland Central
32	Suzy's Trust	Active	Bob Brown	Family Trust	Gifting	Auckland Central
34	Support Trust	Active	Bob Brown	Family Trust	Gifting	Auckland Central
46	Jason Freeman Trust	Active	Gus Hatton	Family Trust	Gifting by Others	Hamilton
49	One Two Three Family Trust	Active	Suzy Taylor	Family Trust	Gifting	Auckland Central
53	Kyle Mills Family Trust	Active	Bob Brown	Family Trust	Gifting Complete	Auckland North
60	The Smith family trust	Active	Bob Brown	Family Trust	Gifting Complete	Hamilton
63	Anderson Trust	Active	Bob Brown	Family Trust	Gifting	Christchurch
69	Thursday Training Trust	Active	Bob Brown	Family Trust	Gifting	Auckland Central

Annotations:

- Report and filter trusts by Status, Category or Manager (points to Trust Status, Trust Category, and Manager dropdowns)
- Report and filter on Trust Group and control access to specific trusts (points to Trust Group dropdown)
- Filter trusts by Type (points to 'All Trust Types' filter)

Rename any of the fields on the Legal screen and set up your own Options for quick, easy and consistent completion of information.

Wolters Kluwer

CCH Companies and CCH iTrust

Trust Legal Summary CCH Training Trust CCH Demo System With Data - Karen Rogers

General	Beneficiaries by Class	Any child or children of the Principal Family Member born or adopted before the Vesting Day	Options
Relationships	Appointment and Removal of Trustees	Refer to clause 17 in CCH Declaration of Trust or CCH Deed of Trust	Options
Responsibilities	Power to Resettle	Refer to clause 8 in CCH Declaration of Trust or CCH Deed of Trust	Options
Legal	Decision Making Criteria	Majority Number required for majority 3	Options
Financial	Cheque Signing	Jointly, CCH Trustee Ltd and Justine Colstone	Options
Notes	Location of Minute Book	In Auckland office 82a Symonds St	Options
Other	Memorandum of Guidance	12	Options
Assets	Memorandum of Medical Wishes		Options
Gifting/Loan			
Distributions			
Revenue			
Documents			
Checklists			
Tasks			
Reports			
Save & Close			
Cancel			

Add your own responsibilities to this list.

Wolters Kluwer

Trust Responsibility

Date: 26/06/2017

Responsibility: Please Select

Party Responsible: 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

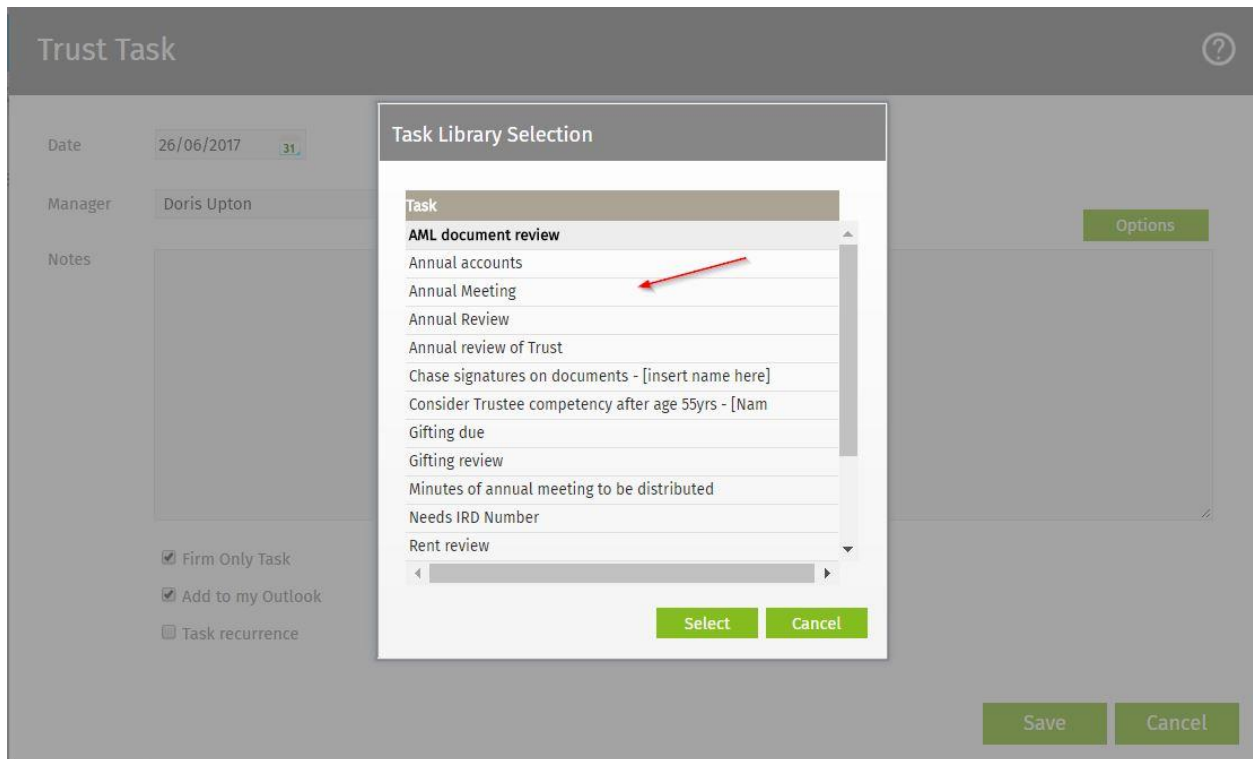
Others Responsible:

Notes:

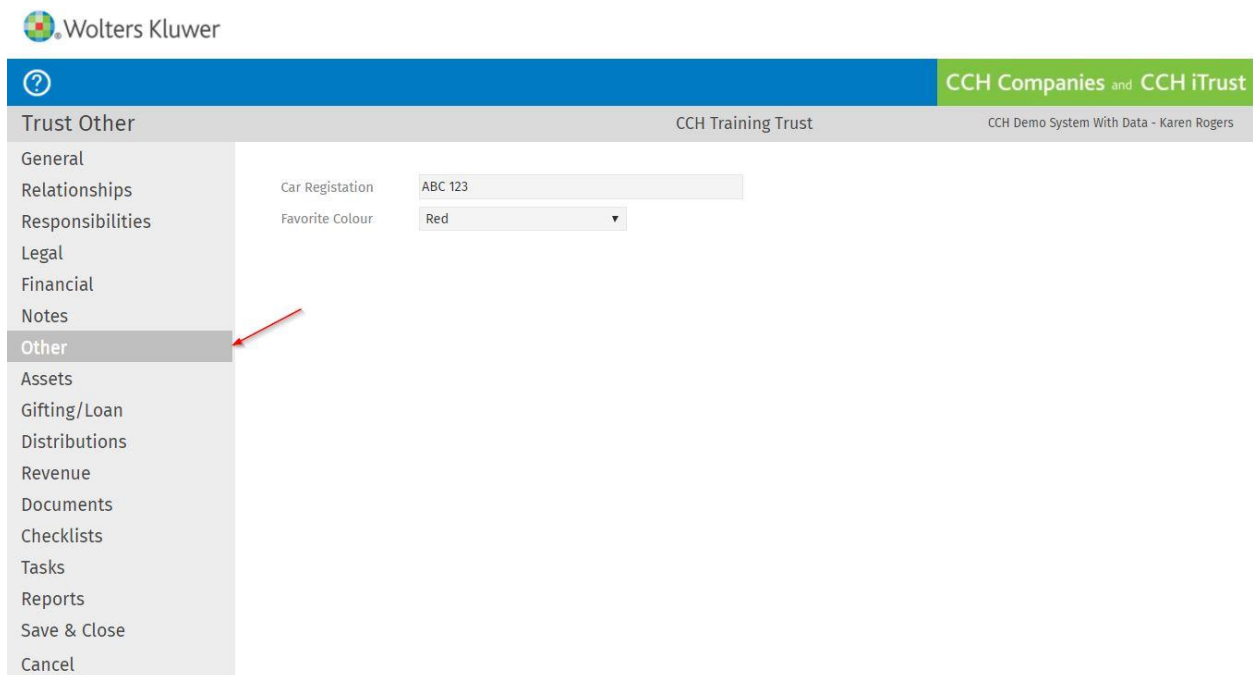
Termination Date: 31

Save Cancel

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	Templates	Entry Types	Setup
Logins	Company Checksheets	Giftng/Loan Posting Groups	AML Documents
Managers	Company Master Templates	Giftng/Loan Posting Types	Banks ←
Personal Setup	Company Task Templates	Minute Groups	Company Setup
	Master Templates ←	Person Titles	Company Types
	Minute Templates	Trust Responsibilities ←	Dynamic Company Data
	Task Templates ←		Dynamic Legal Data ←
	Trust Checksheets ←		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/>