



Trust Search

Recently Viewed Trusts	
Private Client, Ltd.	74
Private Banks, Ltd.	56
Business Banks, Ltd.	304
Trust Banks, Ltd.	27
Trust Funds, Ltd.	4
Test. Model	10
MLC Trust	1
CCH Banking Ltd.	10
Business Banks, Ltd.	10
MLC Domestic Fund	989
Business Banks, Ltd.	10
Business Banks, Ltd.	31

People Search

Recently Viewed People	
Fred Michael, PICHINCHA	2
John Doe	2
Paul Johnson	1
Bob Brown, ABBA	1
Anna Smith	10
Peter Green, Fleetwood	1
Mike Johnson	9
John Doe	1
Robert Johnson	1
Julia Smith	1
Patricia Johnson	1
Paul Johnson	1

Company Search

Recently Viewed Companies	
MLC INVESTMENT LIMITED	7
MLC LAMPS, LTD.	70
Business Banks, Ltd.	440
MLC BANKS	5
MLC INVESTMENT LTD.	10
MLC CONTRACTING LTD.	30
MLC CHARTERED LTD.	1
MLC GROUP NEW ZEALAND LTD.	21
MLC INVESTMENT LTD.	21
MLC INVESTMENT LTD.	9
MLC INVESTMENT LTD.	1

Trust Quick Links

- All Trusts
- Add New Trust
- Tasks

People Quick Links

- All Persons
- Add New Person

Company Quick Links

- All Companies
- Add New Company
- Tasks

CCH Entities: The best browsers and devices to use

This guide will help you to understand the best browsers and devices and also so how to upload and download documents

We have tested CCH Entities with Firefox, Chrome, Internet Explorer and Safari. It has also been tested on Windows computers, iPhones, iPads and other smart phones and tablets.

Browsers

	 Recommended	 Recommended		
Access data	✓	✓	✓	✓
Add/edit data	✓	✓	✓	✓
Create documents	✓	✓	✓	✓
Upload documents	✓	✓	✓	✗
Download documents	✓	✓	✓	✓
Edit documents	✓	✓	✓	✓
Complete checklists	✓	✓	✓	✓
Add tasks to software	✓	✓	✓	✓
Add tasks to Outlook	✓	✓	✓	✗
Reports	✓	✓	✓	✓
Link to NZ Companies	✓			
Office & import data	✓	✓	✓	✓

Recommended: Generally Chrome and Firefox perform a little better in terms of speed and screen display, particularly when completing Checklists.

Devices

	PC/laptop with Chrome, Firefox or IE	Android with Google Chrome	iPhone/iPad with Safari
Access data	✓	✓	✓
Add/edit data	✓	✓	✓
Create documents	✓	✓	✓
Upload documents	✓	✗	✗
Download documents	✓	✓	✓
Edit documents	✓	✗	✗
Complete checklists	✓	✓	✓
Add tasks to software	✓	✓	✓
Add tasks to Outlook	✓	✗	✗
Reports	✓	✓	✓
Link to NZ Companies	✓	✓	✓
Office & import data	✓	✓	✓

Whilst it is technically possible to work on a smart phone the screen size can make it difficult.

Additional apps may be required to create and view documents using a phone or tablet.

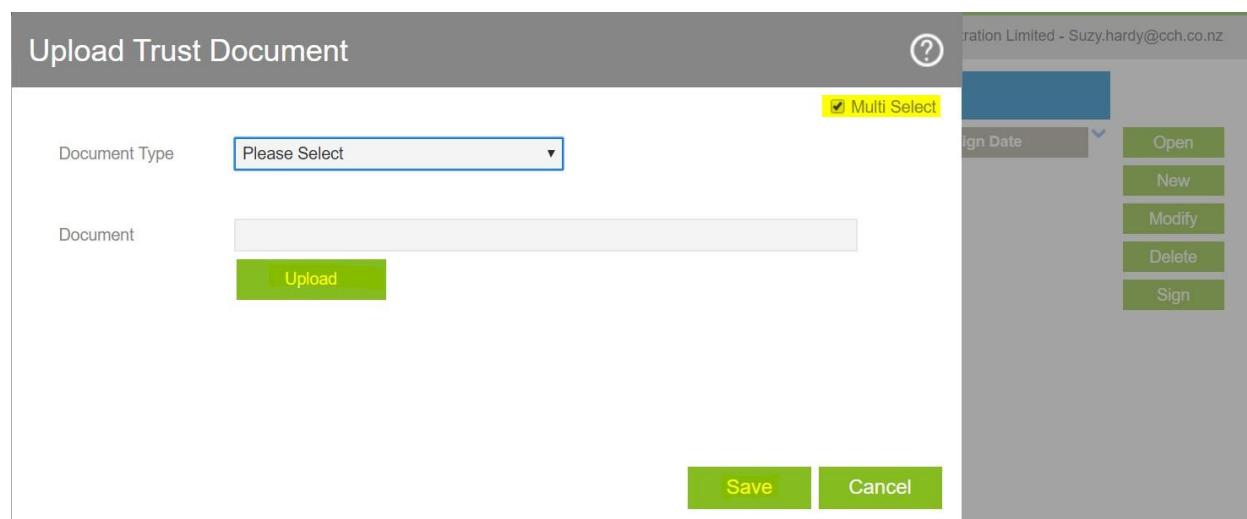
Settings

If you find you are able to do some things in one browser and not another it is most likely due to your local settings.

Uploading Documents

Documents are uploaded to the documents area, from there select **New > Upload Documents**.

If you want to upload more than one document at a time, tick the Multi Select option.



Downloading Documents

Downloads may appear on a separate tab, new window, at the top of your screen or at the bottom of your screen. You may be asked to save them before you open them or not.

Resolution: If you want to change your download preferences have a look at your browser settings.

Example in Firefox



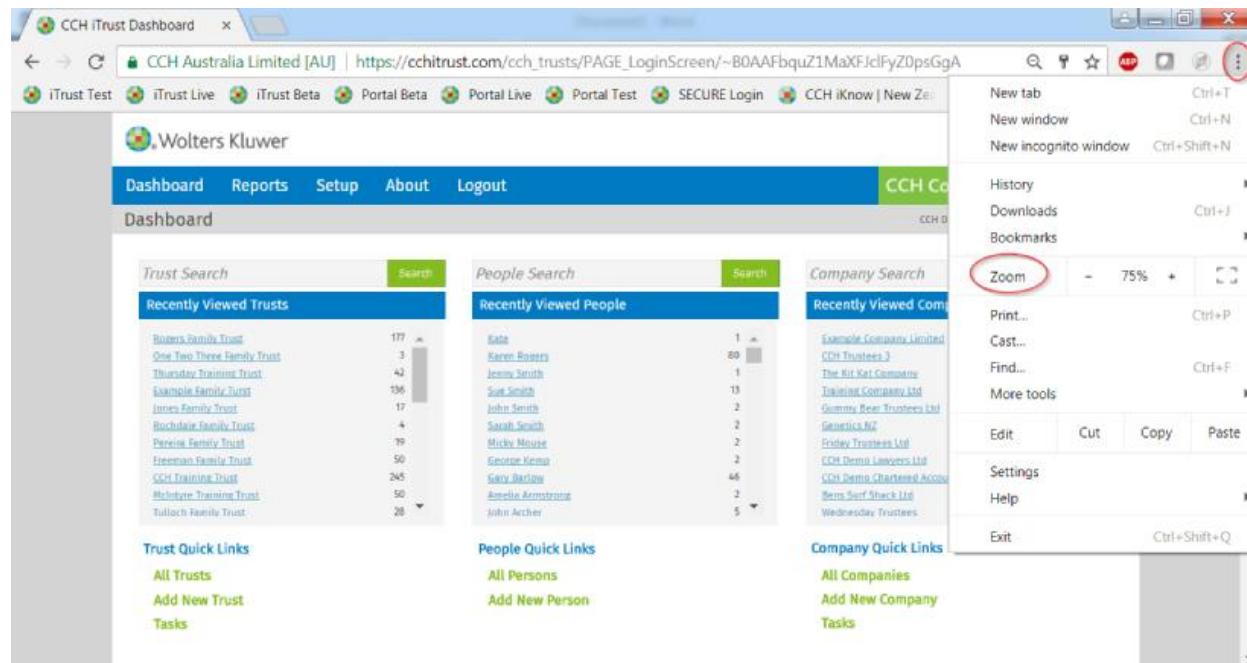
Note: Some download settings may be controlled by your system administrator.

View

The software may not display well with data being cut off or the dashboard notifications overlapping information.

Resolution: Zoom your view settings in or out.

Example in Chrome



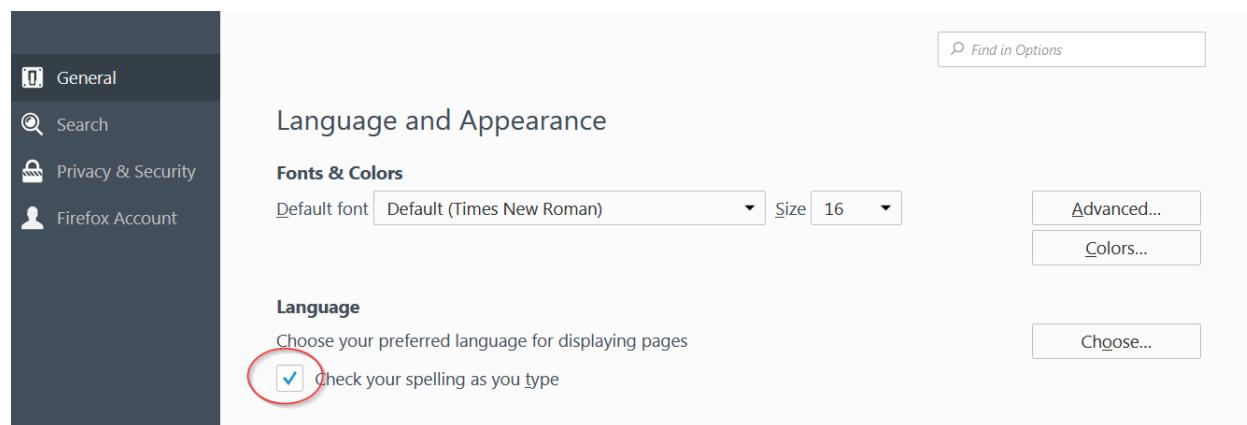
The screenshot shows the CCH iTrust Dashboard interface. On the left, there are three search panels: Trust Search, People Search, and Company Search, each with a 'Recently Viewed' section. Below these are 'Quick Links' for each category. The browser's context menu is open on the right, with the 'Zoom' option circled in red. Other menu items include New tab, History, Downloads, Bookmarks, Print, Cast, Find, More tools, Edit, Cut, Copy, Paste, Settings, Help, and Exit.

Spelling

Your browser should offer a spell check feature as you type.

Resolution: Check your settings to ensure the spell check is enabled.

Example in Firefox



The screenshot shows the Firefox settings menu. The 'General' section is selected on the left sidebar. In the main content area, there are sections for 'Language and Appearance' and 'Fonts & Colors'. Under 'Language', there is a dropdown for 'Choose your preferred language for displaying pages' and a checked checkbox for 'Check your spelling as you type'. There are also 'Advanced...' and 'Colors...' buttons. A 'Choose...' button is located at the bottom right of the language section.

GETTING HELP

Your IT support person should be able to help with your browser settings.