

TRUST SERVICE TRAINING - LEVEL 3

SESSION 10.3

EXPORT

It is possible to export data from People or Trusts into Excel

Note

Trust Service is compatible with Microsoft Excel

These instructions are written for Excel 2003 there may be variations in earlier or later versions

Export

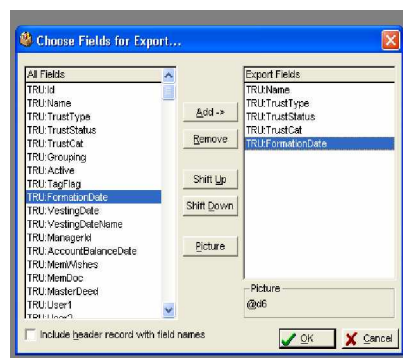
Open the Trust Service

Select Utilities, Select Export

Select People or Trusts



You will now see a list of all the fields that are available for you to export



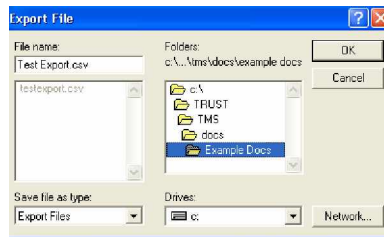
Highlight the required field and select Add.

You can arrange the fields on the list by highlighting and selecting Up and Down.

Select Include Header Record with Field Names to get a Header Row in your Spread Sheet

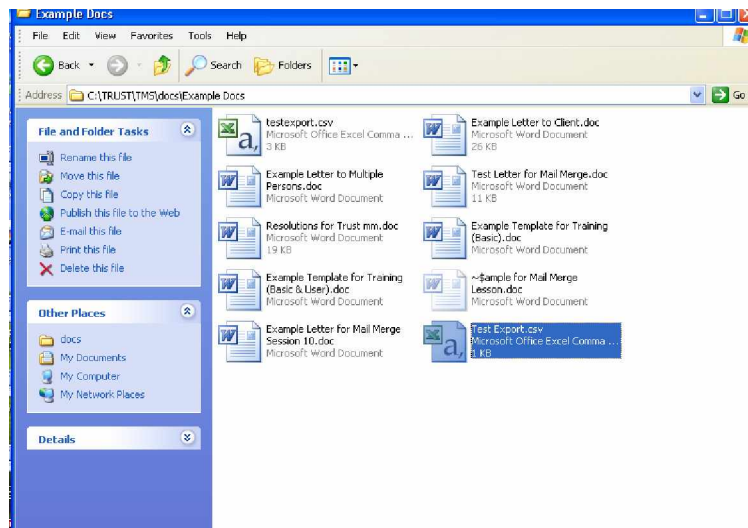
Select OK

Name your export and chose where it should be saved & select OK



The data is now exported.

Go to the location that you chose to save the data and open the Spread Sheet



You now have a spreadsheet containing the information you exported

	A	B	C	D	E	F
1	TRU-Name	TRU-TrustType	TRU-TrustStatus	TRU-TrustCat	TRU-FormationDate	
2	CCH LEARNING TRUST	Family Trust	Current	Gifting	31/05/2008	
3	DODGE FAMILY TRUST	Family Trust	Current	Gifting	1/01/2008	
4	COLBERT FAMILY TRUST	Family Trust	Current	Gifting	1/01/2008	
5	HODGESON FAMILY TRUST	Family Trust	Current	Gifting	1/01/2008	
6	GIRDER FAMILY TRUST	Family Trust	Draft	Gifting	1/01/2008	
7	LEONELLI FAMILY TRUST	Family Trust	Draft	Gifting	1/01/2008	
8	ULRICH FAMILY TRUST	Family Trust	Draft	Gifting	1/01/2008	
9	ARMSTRONG FAMILY TRUST	Family Trust	Draft	Gifting	1/01/2008	
10	STEPHENSON FAMILY TRUST	Family Trust	Current	Gifting	1/01/2008	
11	TEST TRUST	Family Trust	Current	Gifting	27/06/2008	