

TRUST SERVICE TRAINING - LEVEL 1

SESSION 1

OVERVIEW

In this session we will learn how to:-

- ⇒ Add a New Trust
- ⇒ Add a New Person Record
- ⇒ Add a New Company Record
- ⇒ Link People & Companies to the Trust Record
- ⇒ Maintain Trust & People Records

Prerequisites for Level 1, Session 1

- ⇒ The Trust Service Software is Installed at your office
- ⇒ You have the latest version, 4.2
- ⇒ You are comfortable using a PC & Windows Software
- ⇒ You may have used a Database previously (not essential)

Preparation for Level 1, Session 1

- ⇒ Print the Session Notes
- ⇒ Set up Webex Meeting Manager on your PC, ideally the day before the session in case you have any difficulties
- ⇒ Dial into the Meeting, using the Link & Password provided 5mins prior to start time