

# TRUST SERVICE TRAINING - LEVEL 2

## SESSION 5.5

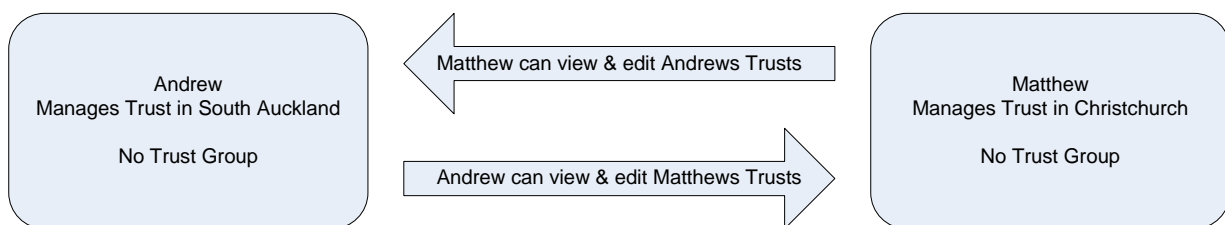
### TRUST GROUPS

Trust Groups can be used to control access to Groups of Trusts

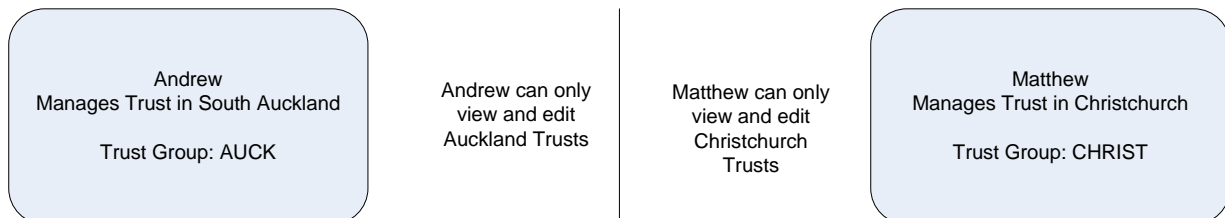
Trust Groups can be added to give 'view only' access to Groups of Trusts

**Note:** The difference between using the Security Level settings and Trust Groups are that Security setting control access per individual User & individual Trust, Trust Groups controls access in Groups. Security Settings do not allow View Only access

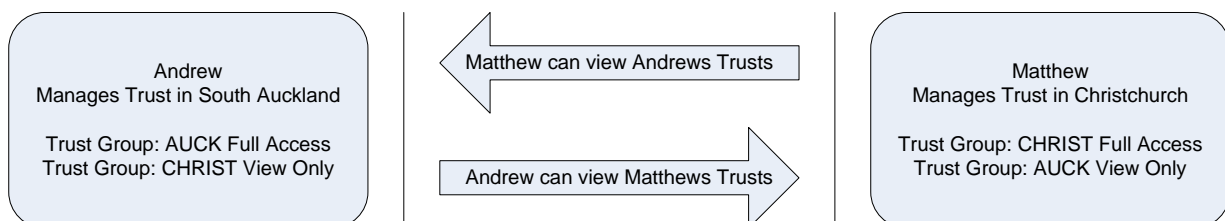
#### Option 1 – No Trust Groups; all users can view and edit all Trusts



#### Option 2 – Own Trust Group only; users can view and edit Trusts in own Trust Group only

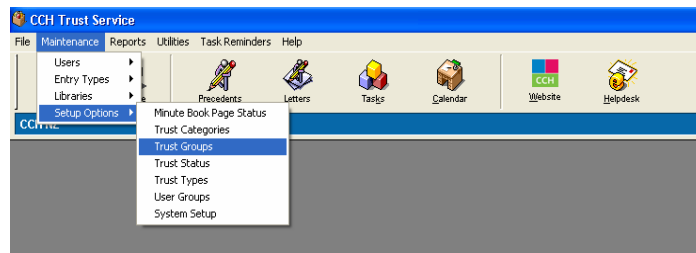


#### Option 3 – Own Trust Group, plus a View Only Trust Group; users can view & edit Trusts own Trusts and view only Trusts in other group

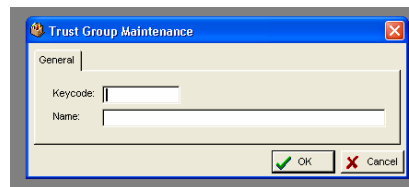
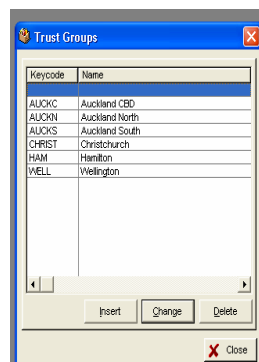


## ADDING A TRUST GROUP

Select Maintenance, select Setup Option, select Trust Groups



Select Insert



Type a Name for your Trust Group that explains what this group is for, for example, Auckland Office or Andrews Trust

Select OK to Save

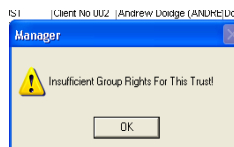
## ADDING A TRUST GROUP TO A TRUST

Select the Trust Group from the drop down menu

Person Name	Active Functions	Inactive Functions
CCH Trusts Ltd	Trustee	
CCH Accounts Ltd	Accountant	
CCH Law Ltd	Lawyer	
Colbert, Jayne	Beneficiary	
Hodgson, Guy	Beneficiary	
Ulrich, Danya	Settlor/Trustee	

Only Users with the Trust Group can now access this Trust

If a User attempts to access a Trust that they do not have the correct Group for the following message will be shown.



When viewing a Trust in a Trust Group that has View Only rights, you will see 'View Only Mode' at the top of the screen and the OK button is greyed out to prevent editing.

## ADDING A TRUST GROUP TO A USER

Select Maintenance, select Users, select Logon Names, highlight User Name, Select Change

**Logon Maintenance**  
 General | **User Settings** | User Group Settings | Trust Groups | Task Reminders | Legacy

Logon Code: ANDREW  
 Name: Andrew Doidge  
 Password:   
 Security Level: 8 (9 = Manager)  
 Manager Link:   
 Default Trust Listing Sort Order:  
 1. Trust Number  2. Trust Name  3. Reference  4. Client Name  
 User Group: CCH Staff  
 See User Group Settings Tab for Details

OK Cancel

Select Trust Groups

**Logon Maintenance**  
 General | User Settings | User Group Settings | **Trust Groups** | Task Reminders | Legacy

Group	Name
AUJCK	Auckland CBD
AUJCS	Auckland South

Insert Change Delete

OK Cancel

Select Insert & use drop down to select appropriate Trust Groups

**Trust Group Maintenance**  
 General

Group:   
 View Only Mode:

OK Cancel

If this Trust Group is to be View Only for this User, check View Only box

[Return to Session 5.1 to set the appropriate Trust Groups](#)