

# TRUST SERVICE TRAINING - LEVEL 2

## SESSION 6

### OVERVIEW

In this session we will learn how to:-

- ⇒ Set up, maintain & use Trust Types
- ⇒ Set up, maintain & use Trust Status
- ⇒ Set up, maintain & use Trust Categories
- ⇒ Rename Trust Status and Trust Category
- ⇒ Set up additional Titles
- ⇒ Set System Defaults
- ⇒ Set up, maintain & use Trust User Defined Fields
- ⇒ Set up, maintain & use People User Defined Fields

### Prerequisites for Level 2, Session 6

- ⇒ The Trust Service Software is Installed at your office
- ⇒ You have the latest version, 4.2
- ⇒ You are familiar with the basic functions in the Trust Service Software, adding a Trust, maintaining records, etc.
- ⇒ You are familiar with using database's in general
- ⇒ You have User Access Level 9

### Preparation for Level 2, Session 6

- ⇒ 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