

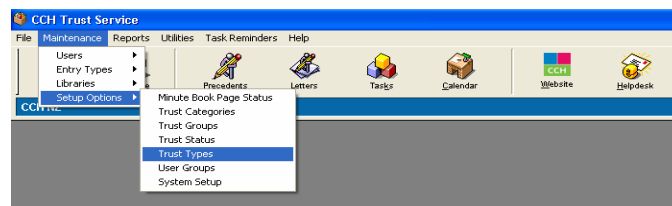
# TRUST SERVICE TRAINING - LEVEL 2

## SESSION 6.1

### TRUST TYPES

The Trust Service comes with a standard set of Trust Types. It is possible to add to and edit this list.

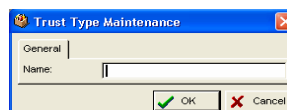
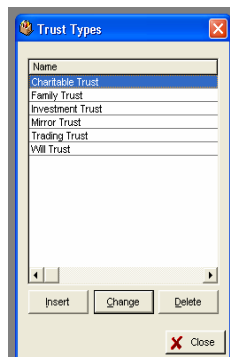
Select Maintenance, select Setup Options, select Trust Types



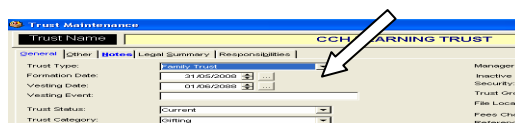
Note: If you are not able to access any options under Maintenance you do not have the correct access level.

Select Insert to add a new Type

Select Change to edit an existing Type



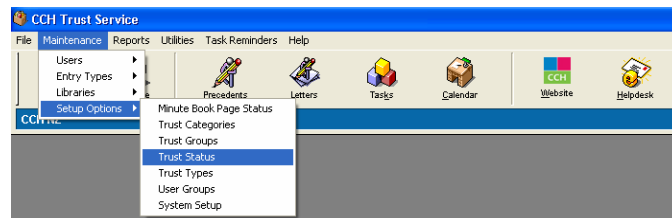
Open the Trust on the Trust Maintenance Screen. The drop down list will now contain your new options.



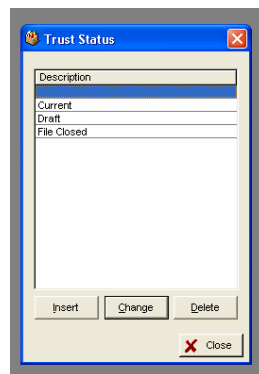
## TRUST STATUS

The Trust service comes with 2 Trust Status options, Blank or Draft. It is possible to add to and edit this list. It is also possible to rename the Trust Status Field if you want to use it for another purpose.

Select Maintenance, select Setup Options, select Trust Status

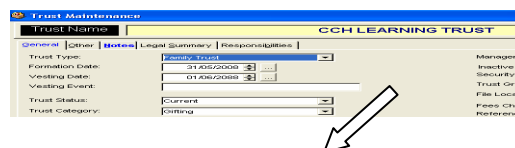


Select Insert to add a new Status  
 Select Change to edit an existing Status



Tip: If you delete the Blank option on your list Users must then select something. This will help keep your data tidy and ensure people are entering all of the information for the Trust

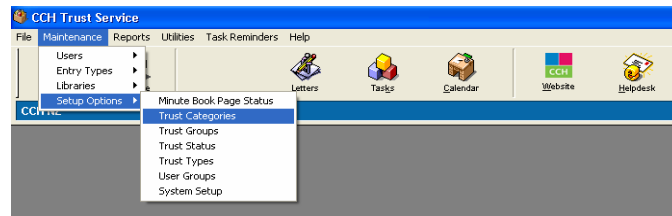
Open the Trust on the Trust Maintenance Screen. The drop down list will now contain your new options.



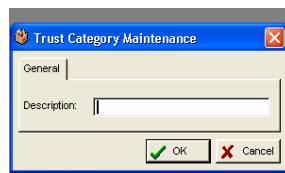
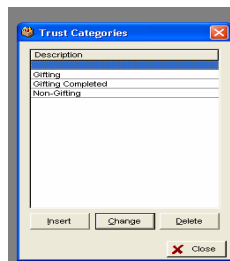
## TRUST CATEGORY

The Trust service comes without any pre-set Category options. It is possible to add your own list. It is also possible to rename the Trust Status Field if you want to use it for another purpose.

Select Maintenance, select Setup Options, select Trust Category

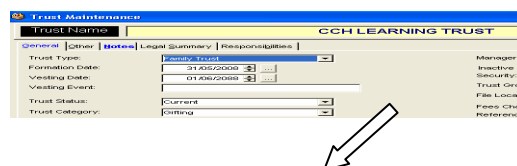


Select Insert to add a new Category  
 Select Change to edit a Category



Tip: If you do not set up a Blank option on your list Users must then select something. This will help keep your data tidy and ensure people are entering all of the information for the Trust

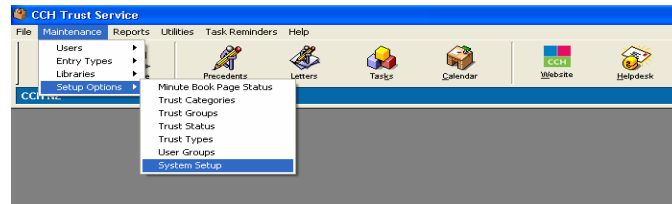
Open the Trust on the Trust Maintenance Screen. The drop down list will now contain your new options.



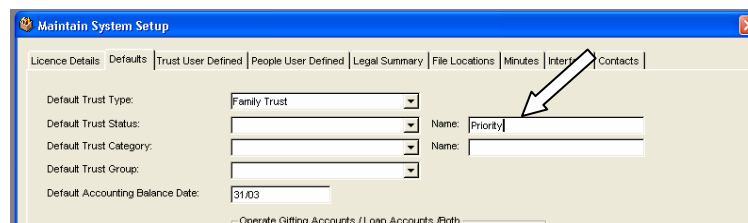
## RENAMING TRUST STATUS AND TRUST CATEGORY

If you want to use either Status or Category for another function you can rename the field and configure the options you want (as above) for the drop down list.

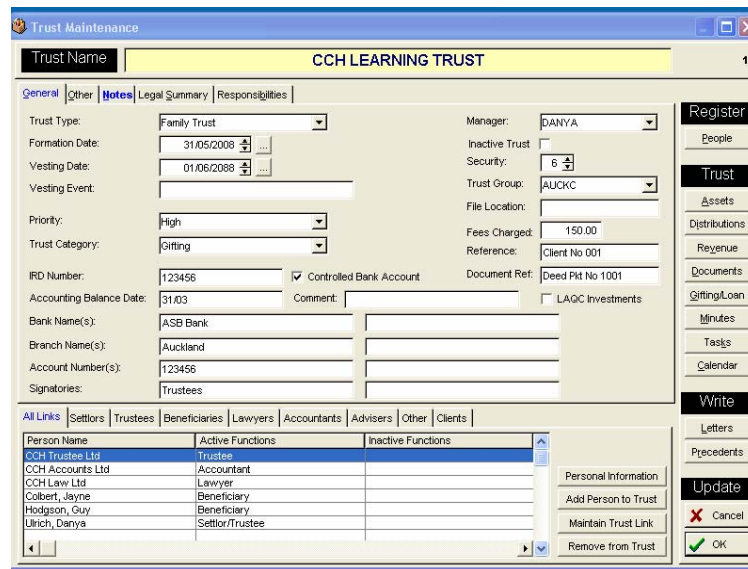
Select Maintenance, select Setup Options, select System Setup



Go to the Defaults Tab



Type your new name for Trust Status in the Name field.



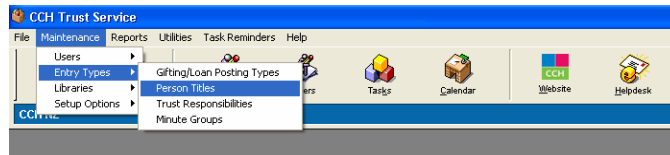
In this example Status has been changed to Priority and the Options High, Medium & Low are set up on the drop down menu

Use the same process to change Category.

## Person Titles

The Trust Service comes with a standard set of Person Titles. It is possible to add to and edit this list.

Select **Maintenance**, select **Entry Types**, select **Person Titles**



Select **Insert** to add new Titles

Select **Change** to edit existing Titles



These will now be available when you are adding a Person Record