

# TRUST SERVICE TRAINING - LEVEL 2

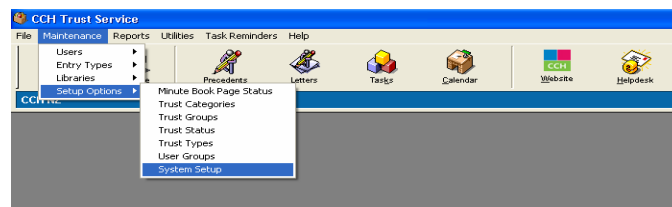
## SESSION 6.2

### SYSTEM DEFAULTS

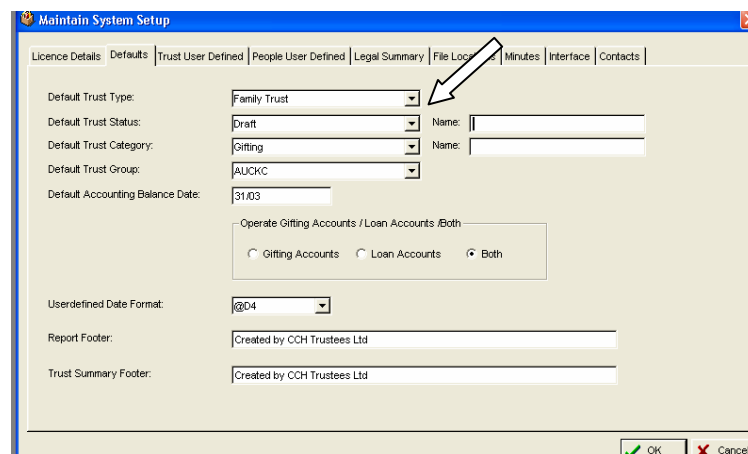
Once you have set up your drop down lists for Trust Type, Trust Status, Trust Category and Trust Group you can set the **default entry** into these fields for all new Trusts entered.

Information is added into these fields when you add a new Trust but it can be changed by the User, therefore, we recommend you select the most commonly used selection for your defaults.

Select Maintenance, select Setup Options, select System Setup

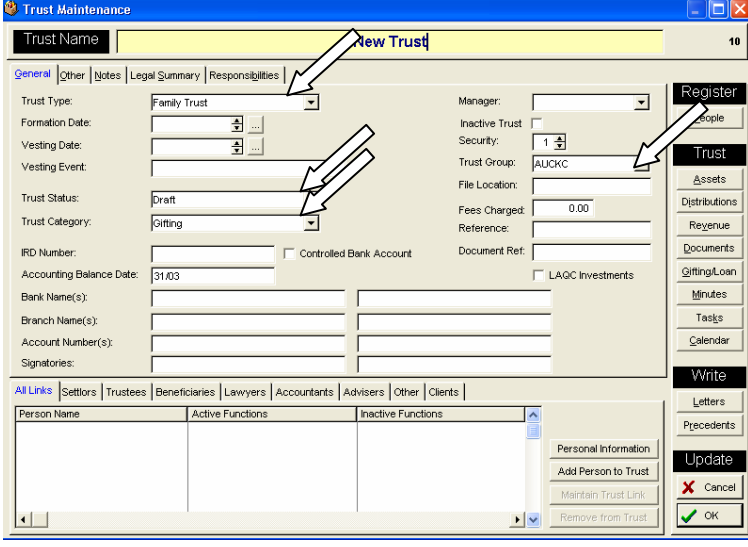


Go to the Defaults Tab



Use the arrow at the end of each field to select the **default entry** you require

The defaults are now added when you Insert a new Trust



The screenshot shows the 'Trust Maintenance' window with the following details:

- Trust Name:** New Trust
- Trust Type:** Family Trust
- Trust Status:** Draft
- Trust Category:** Gifting
- Trust Group:** AUCKC
- Manager:** (empty)
- Security:** 1
- Fees Charged:** 0.00
- Accounting Balance Date:** 31/03
- Controlled Bank Account:**
- LAGC Investments:**

The 'Update' button is highlighted in the bottom right corner.

The User can change these at any time by selecting the arrow at the end of the field and selecting another option from the list.