

# TRUST SERVICE TRAINING - LEVEL 2

## SESSION 6.3

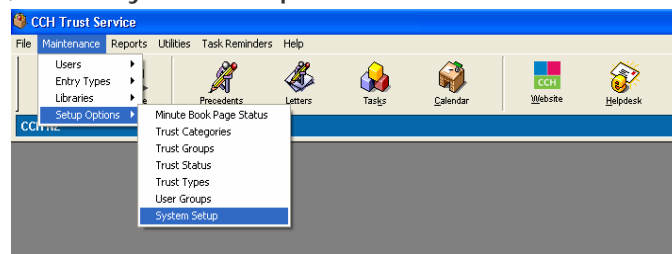
### USER DEFINED FIELDS

If you have information you need to record against either a Trust or a Person record and there is not currently an area to enter it you are able to create additional **User Defined Fields**.

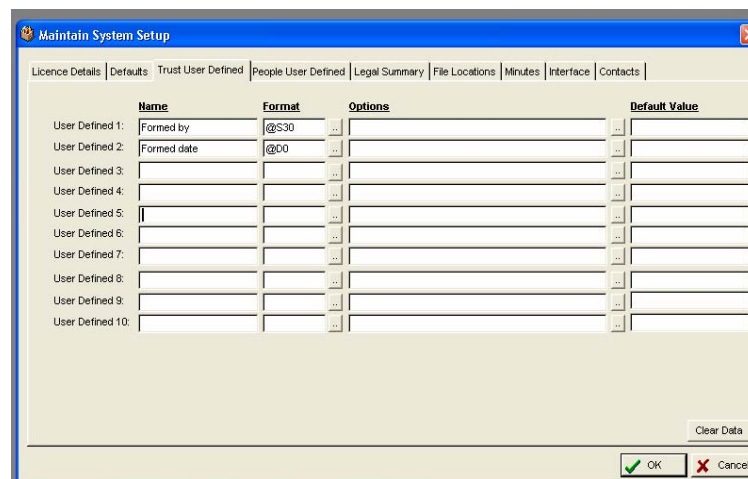
There are 10 User Defined Fields for the Trust Record and 5 User Defined Fields for the Person Record

### ADDING A TRUST USER DEFINED FIELD

Select Setup Options, select System Setup



Select Trust User Defined



	Name	Format	Options	Default Value
User Defined 1:	Formed by	@S30		
User Defined 2:	Formed date	@DD		
User Defined 3:				
User Defined 4:				
User Defined 5:				
User Defined 6:				
User Defined 7:				
User Defined 8:				
User Defined 9:				
User Defined 10:				

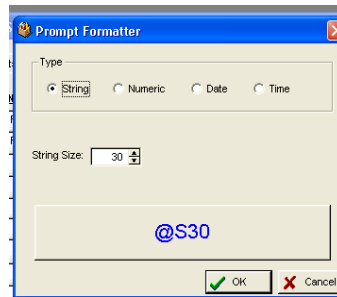
Type the name for your additional field

Select the Format Option; Text, Numeric, Date or Time

Leave Options blank to allow free type or configure a drop down list of Options for Users to select from (see below)

Type or select a Default Value if required.

## Format Options



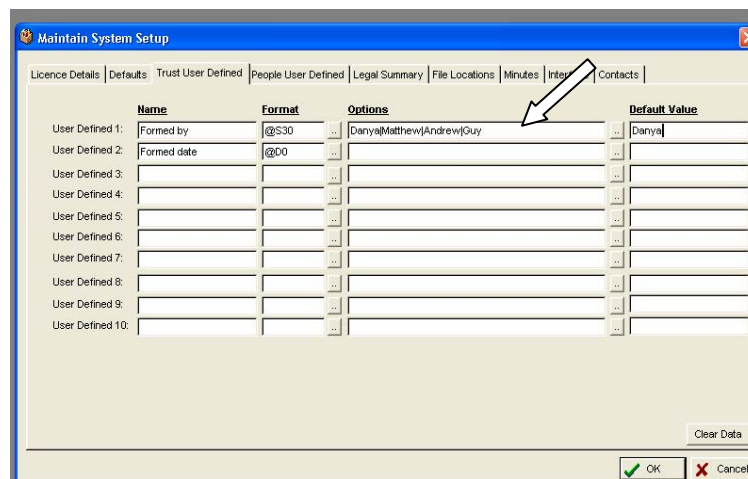
Text = String, select maximum length of text e.g. 30 characters

Numeric = Select decimal point & 'allow negative' or not

Date = select format

Time = no selection to make

If you want Users to have a drop down to select from, click the small box at the end of Options field. You can now type up to 20 options for them to select from.

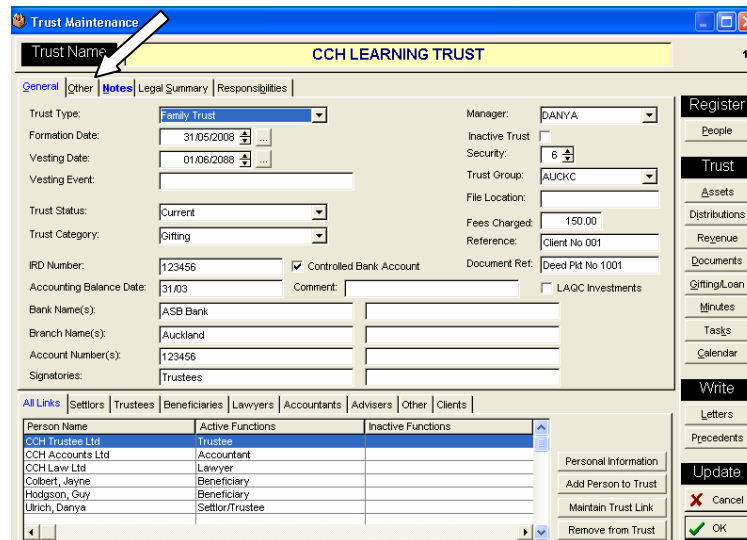


In this example I have set a list of names with a default value

Click OK to Save

## USING THE TRUST USER DEFINED FIELDS

If User Defined Fields have been created you will see an **Other** tab in the Trust Maintenance Screen



**Trust Maintenance**  
Trust Name: **CCH LEARNING TRUST**

General | **Other** | Notes | Legal Summary | Responsibilities

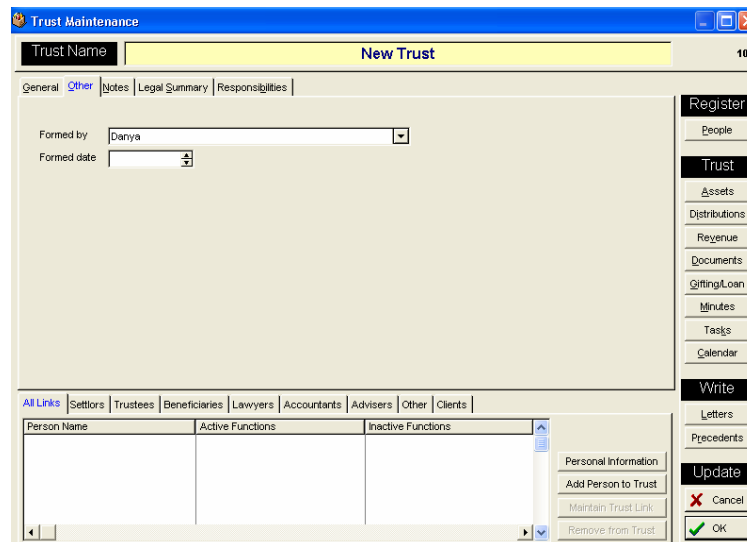
Trust Type: Family Trust  
 Formation Date: 31/05/2008  
 Vesting Date: 01/06/2008  
 Vesting Event:  
 Trust Status: Current  
 Trust Category: Gifting

Manager: DANYA  
 Inactive Trust:  
 Security: 6  
 Trust Group: AUCKL  
 File Location:  
 Fees Charged: 150.00  
 Reference: Client No 001  
 Document Ref: Deed Pit No 1001

IRD Number: 123456  
 Accounting Balance Date: 31/03  
 Bank Name(s): ASB Bank  
 Branch Name(s): Auckland  
 Account Number(s): 123456  
 Signatories: Trustees

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

Select **Other** & you will see the User Defined Fields you have created. In this example the **Formed by** field has been populated with the Default value 'Danya'



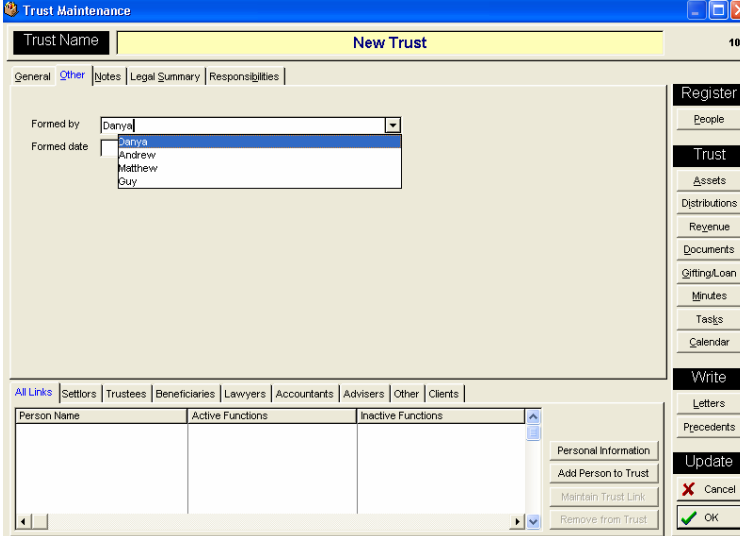
**Trust Maintenance**  
Trust Name: **New Trust**

General | **Other** | Notes | Legal Summary | Responsibilities

Formed by: Danya  
 Formed date:

Person Name	Active Functions	Inactive Functions

The User may accept the default or use the arrow to access the drop down and select another name.



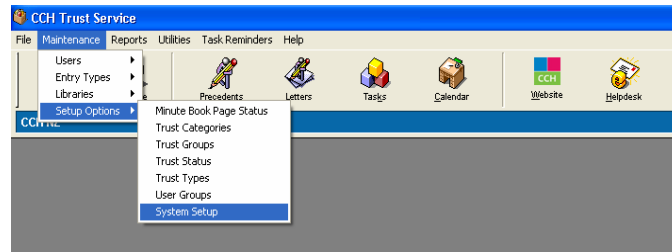
The screenshot shows the 'Trust Maintenance' window with the 'New Trust' form. The 'Formed by' field is set to 'Danya' and the 'Formed date' field is empty. A dropdown menu is open for 'Formed by', showing options: Danya, Andrew, Matthew, and Guy. The interface includes various tabs like 'General', 'Other', 'Notes', 'Legal Summary', and 'Responsibilities'. A table at the bottom lists 'Person Name', 'Active Functions', and 'Inactive Functions'. On the right, there are buttons for 'Register', 'Trust', 'Assets', 'Distributions', 'Regenue', 'Documents', 'Gifting/Loan', 'Minutes', 'Tasks', 'Calendar', 'Write', 'Letters', 'Precedents', 'Update', 'Cancel', and 'OK'.

The date field is free type but must be a valid date as this was the set format

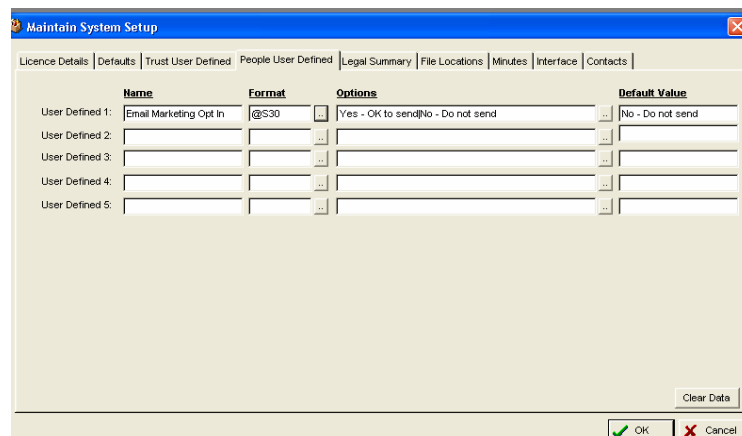
Select OK to Save

## ADDING A PEOPLE USER DEFINED FIELD

Select Setup Options, select System Setup



Select People User Defined



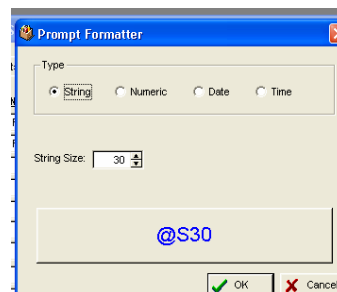
Type the name for your additional field

Select the Format Option; Text, Numeric, Date or Time

Leave Options blank to allow free type or configure a drop down list of Options for Users to select from (see below)

Type or select a Default Value if required.

Format Options



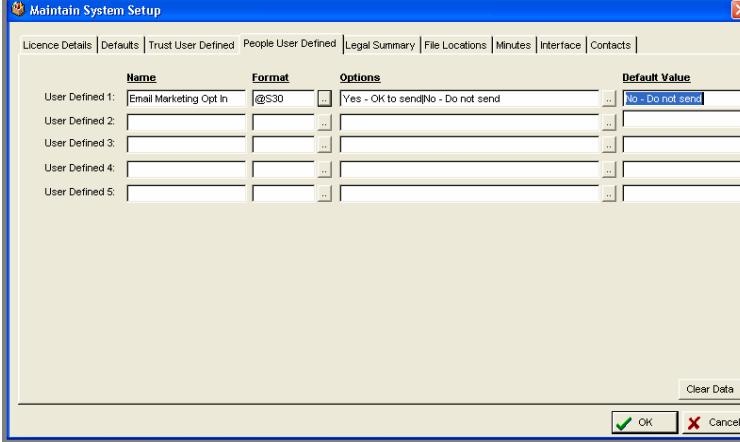
Text = String, select maximum length of text e.g. 30 characters

Numeric = Select decimal point & 'allow negative' or not

Date = select format

Time = no selection to make

If you want Users to have a drop down to select from, click the small box at the end of Options field. You can now type up to 20 options for them to select from.



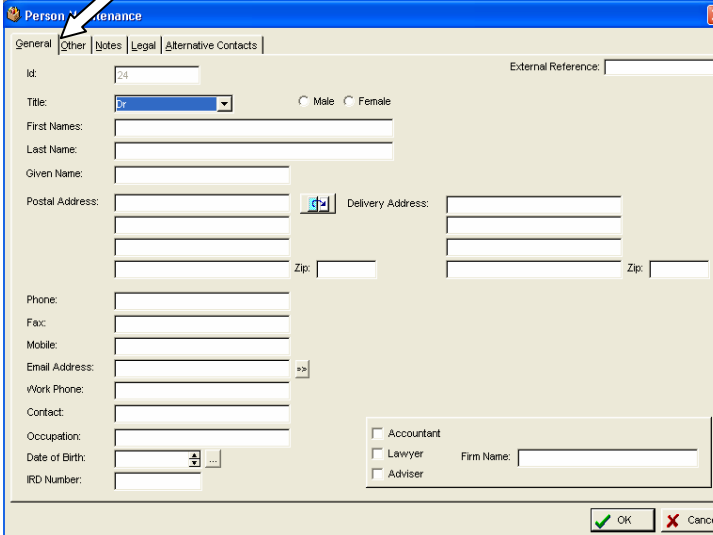
	Name	Format	Options	Default Value
User Defined 1:	Email Marketing Opt In	@S30	Yes - OK to send No - Do not send	No - Do not send
User Defined 2:				
User Defined 3:				
User Defined 4:				
User Defined 5:				

In this example I have set the Options to be Yes or No to receive email marketing. The default has been set to No

Click OK to Save

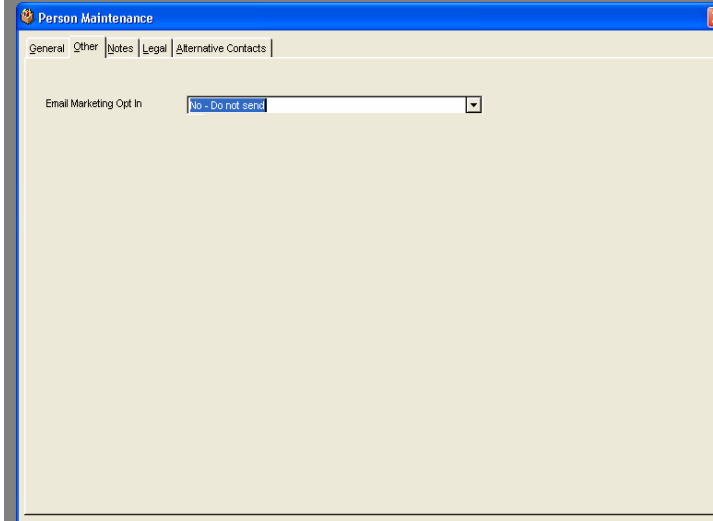
## USING THE PEOPLE USER DEFINED FIELDS

If User Defined Fields have been created you will see an **Other** tab in the Person Maintenance Screen



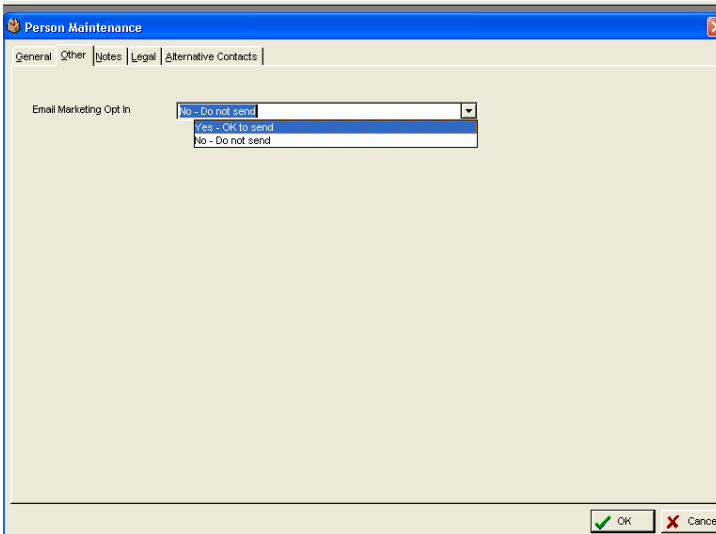
The screenshot shows the 'Person Maintenance' window with the 'Other' tab selected. The 'Email Marketing Opt In' field is highlighted with a blue selection bar and contains the text 'No - Do not send'. Other visible fields include 'Id' (24), 'Title' (Dr), 'First Name', 'Last Name', 'Given Name', 'Postal Address', 'Delivery Address', 'Zip', 'Phone', 'Fax', 'Mobile', 'Email Address', 'Work Phone', 'Contact', 'Occupation', 'Date of Birth', 'IRD Number', and checkboxes for 'Accountant', 'Lawyer', and 'Adviser'. The 'Firm Name' field is also present.

Select **Other** & you will see the **User Defined Fields** you have created. In this example the Email Marketing field has been populated with the Default value 'No'



This screenshot is a close-up of the 'Other' tab in the 'Person Maintenance' window. It shows the 'Email Marketing Opt In' dropdown menu with the selected value 'No - Do not send'.

The User may accept the default or use the arrow to access the drop down and select another option.



The screenshot shows a window titled "Person Maintenance" with tabs for "General", "Other", "Notes", "Legal", and "Alternative Contacts". The "Notes" tab is selected. In the "Email Marketing Opt In" section, a dropdown menu is open, displaying three options: "No - Do not send", "Yes - OK to send", and "No - Do not send". The "OK" button at the bottom right is highlighted with a green checkmark.

Select OK to Save