

# TRUST SERVICE TRAINING - LEVEL 2

## SESSION 7

### OVERVIEW

In this session we will learn how to:-

- ⇒ Use the Trust Reports
- ⇒ Use the People Reports
- ⇒ Use the Gifting Reports
- ⇒ Use the Task Reports
- ⇒ What is in the Set Up Reports
- ⇒ Create your own Customised Trust Reports
- ⇒ Create your own Customised People Report
- ⇒ Run a query on the Trust Service database

### Prerequisites for Level 2, Session 7

- ⇒ 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

### Preparation for Level 2, Session 7

- ⇒ 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