

# TRUST SERVICE TRAINING - LEVEL 2

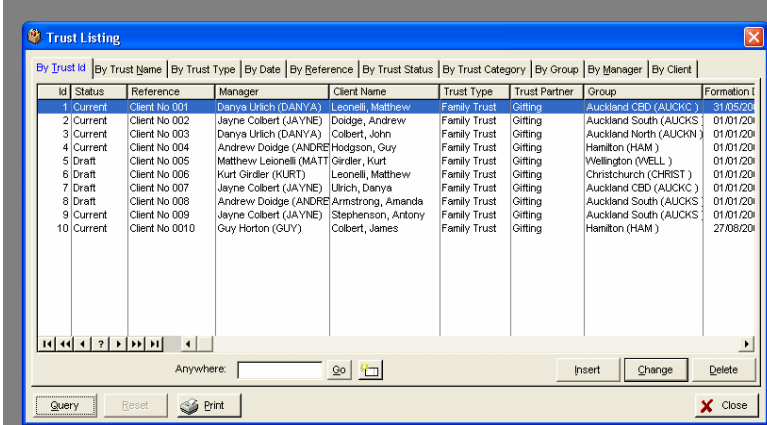
## SESSION 7.5

### QUERY

It is possible to run a query on the database to view only a selected section of your data on the trust listing.

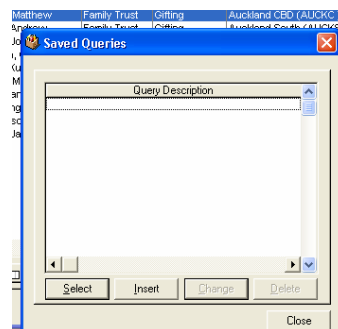
For example: This list below currently shows all Trusts. I can run a query that will show me just those with a draft status.

Once you have a large list of Trusts this can be a valuable tool



Id	Status	Reference	Manager	Client Name	Trust Type	Trust Partner	Group	Formation I
1	Current	Client No 001	Danya Ulrich (DANYA)	Leonelli, Matthew	Family Trust	Gitting	Auckland CBD (AUCKC)	31/05/20
2	Current	Client No 002	Jayne Colbert (JAYNE)	Doidge, Andrew	Family Trust	Gitting	Auckland South (AUCKS)	01/01/20
3	Current	Client No 003	Danya Ulrich (DANYA)	Colbert, John	Family Trust	Gitting	Auckland North (AUCKN)	01/01/20
4	Current	Client No 004	Andrew Doidge (ANDRE)	Hodgson, Guy	Family Trust	Gitting	Hamilton (HAM)	01/01/20
5	Draft	Client No 005	Matthew Leonelli (MATT)	Girdler, Kurt	Family Trust	Gitting	Wellington (WELL)	01/01/20
6	Draft	Client No 006	Kurt Girdler (KURT)	Leonelli, Matthew	Family Trust	Gitting	Christchurch (CHRST)	01/01/20
7	Draft	Client No 007	Jayne Colbert (JAYNE)	Ulrich, Danya	Family Trust	Gitting	Auckland CBD (AUCKC)	01/01/20
8	Draft	Client No 008	Andrew Doidge (ANDRE)	Armstrong, Amanda	Family Trust	Gitting	Auckland South (AUCKS)	01/01/20
9	Current	Client No 009	Jayne Colbert (JAYNE)	Stephenson, Antony	Family Trust	Gitting	Auckland South (AUCKS)	01/01/20
10	Current	Client No 0010	Guy Horton (GUY)	Colbert, James	Family Trust	Gitting	Hamilton (HAM)	27/08/20

Select Query

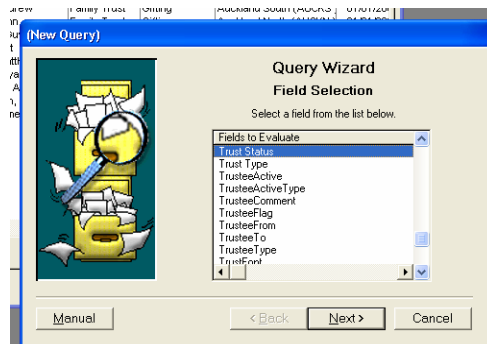


Select Insert to add a new Query

You can now select the criteria for your query - in this example I will ask for only Trusts with a Status of Draft.



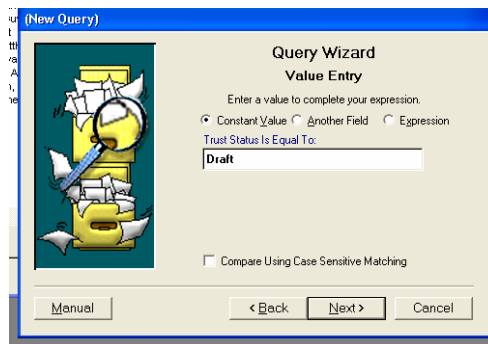
For this example we will highlight Trust Status. Select Next



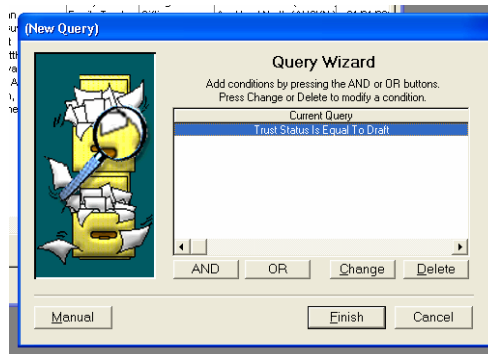
Select the Rule for your Query



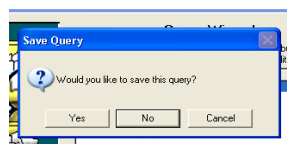
In this example 'Status' is Equal to 'Draft'



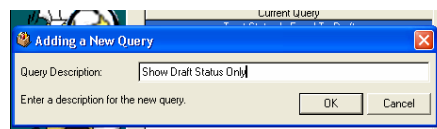
Select Finish



You will be asked if you want to Save the Query



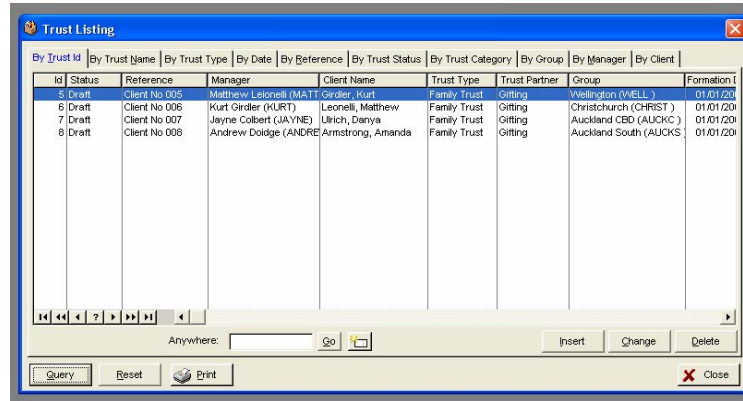
You can then give the Query a Name



The Query will be run automatically when you select OK

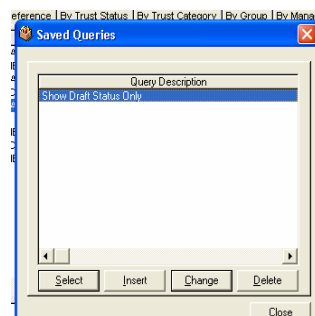
The list now shows only those Trust Records with the Status of Draft

Select Reset to clear the query



The Query can be run at any time

Select Query to show a list of Saved Queries



Select the Query you wish to run  
 Select Reset to Clear the Query

### Other Useful Examples

Manager	Is Equal to	[your manager name]	Shows all Trusts owned by particular Manager
Gift Balance	Is Less Than	27,000	Shows all Trusts with Less than \$27,000 to Gift
Formation Date	Is Greater Than AND Is Less Than	30/07/08  31/08/08	Shows all Trusts Formed in August 08