

TRUST SERVICE TRAINING - LEVEL 2

SESSION 7

OVERVIEW

In this session we learned how to:-

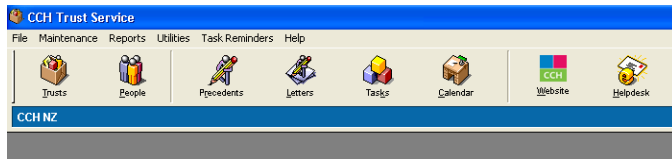
- ⇒ Use the Trust Reports
- ⇒ Use the People Reports
- ⇒ Use the Gifting Reports
- ⇒ Use the Task Reports
- ⇒ What is in the Set Up Reports
- ⇒ Create your own Customised Trust Reports
- ⇒ Create your own Customised People Report
- ⇒ Run a query on the Trust Service database

Action Points/Follow Up

Question	✓	Session Required	Date
Are we using the reports function effectively?		Discuss internally	
Do we need to set up any User Defined Reports		Discuss internally	
Do we need to set up any Queries?		Discuss internally	
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	

For further help:

Select Help to access the Trust Service Help Files



Visit WWW.CCH.CO.NZ/TRAINING for training notes on previous sessions, notes are posted approx 7 days prior to the next session. You can access training notes for session you are not attending.

Contact Support 0800 500 224 if your system is not working

Email Krogers@CCH.co.nz if you have any 'how to' questions. Emails are answered 1day per week only, usually on Thursday or Friday