

## System Setup including Trust Types, Trust Status, Trust Categories, System Defaults & User Defined Fields

In this session we will learn how to:-

- Set up, maintain & use Trust Types
- Set up, maintain & use Trust Status
- Set up, maintain & use Trust Categories
- Rename Trust Status and Trust Category
- Set up additional Titles
- Set up Asset & Revenue Groups
- Set System Defaults
- Set up, maintain & use Trust User Defined Fields
- Set up, maintain & use People User Defined Fields

### Prerequisites for Level 2, Session 7

- The Trust Service Software is Installed at your office
- You have the latest version, 4.3
- 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
- You have User Access Level 9

### Preparation for 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