

# SESSION 7.1

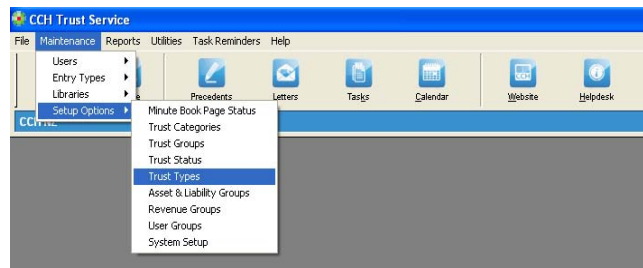
# LEVEL 2

## TRUST TYPES, CATEGORIES, STATUS, GROUPS & TITLES

### Trust Types

The Trust Service comes with a standard set of Trust Types. It is possible to add to and edit this list.

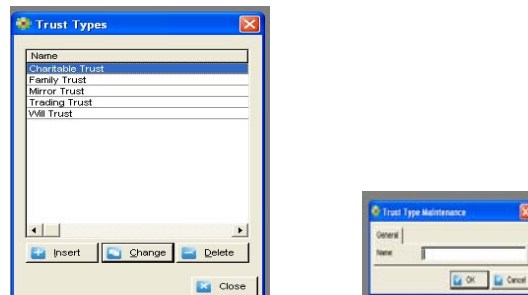
Select Maintenance > Setup Options > Trust Types



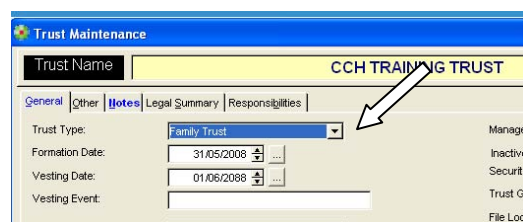
If you are not able to access any options under Maintenance you do not have the correct access level. See notes on Session 6 for more information

Select Insert to add a new Type

Select Change to edit an existing Type



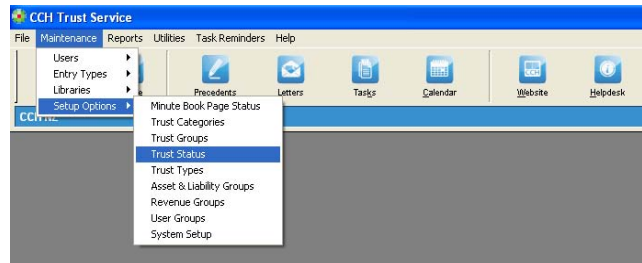
Open the Trust on the Trust Maintenance Screen. The drop down list will now contain your new options.



## Trust Status

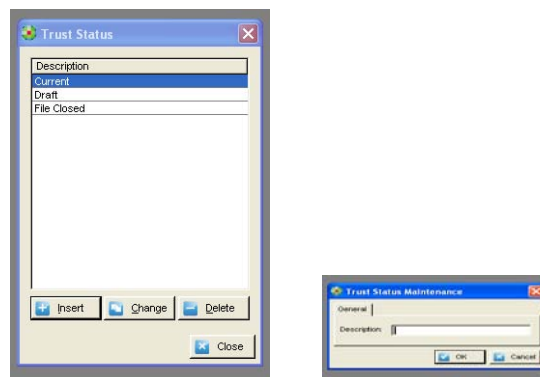
The Trust service comes with 2 Trust Status options, Blank or Draft. It is possible to add to and edit this list. It is also possible to rename the Trust Status Field if you want to use it for another purpose.

Select Maintenance > Setup Options > Trust Status



Select Insert to add a new Status

Select Change to edit an existing Status



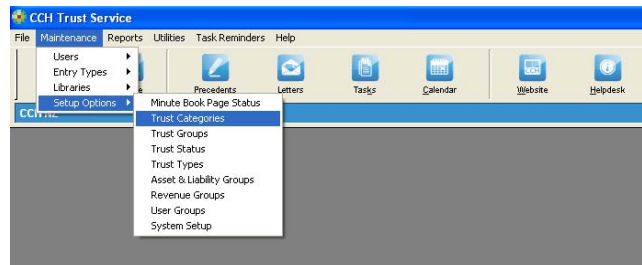
Open the Trust on the Trust Maintenance Screen. The drop down list will now contain your new options.



## Trust Category

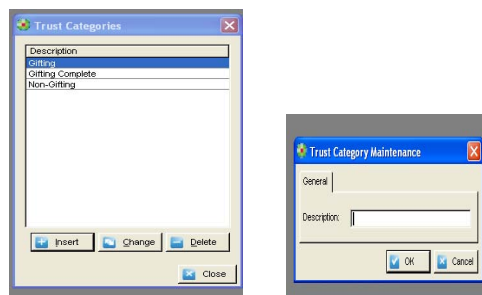
The Trust service comes without any pre-set Category options. It is possible to add your own list. It is also possible to rename the Trust Status Field if you want to use it for another purpose.

Select Maintenance > Setup Options > Trust Category



Select Insert to add a new Category

Select Change to edit a Category



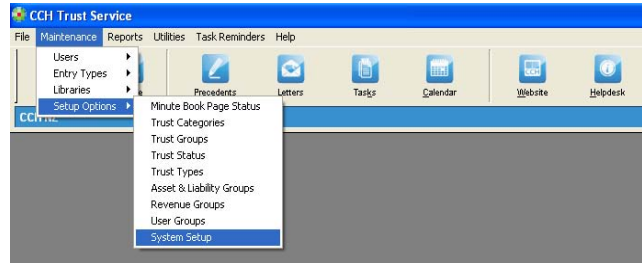
Open the Trust on the Trust Maintenance Screen. The drop down list will now contain your new options.



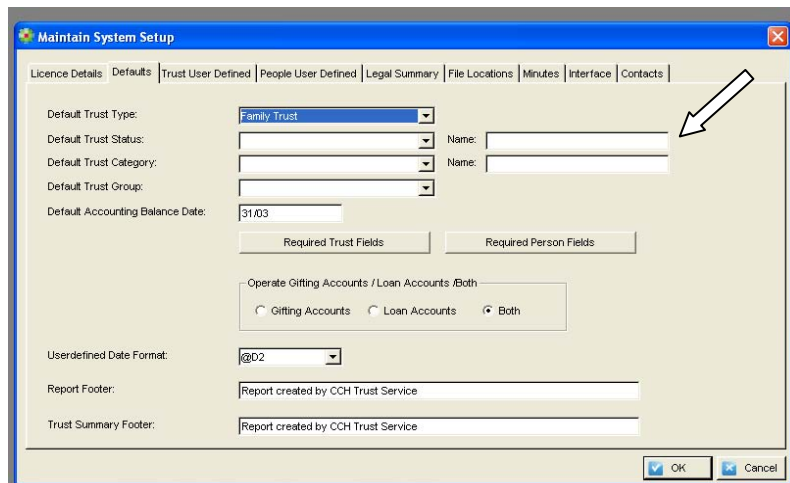
## Renaming Trust Status & Trust Category

If you want to use either Status or Category for another function you can rename the field and configure the options you want (as above) for the drop down list.

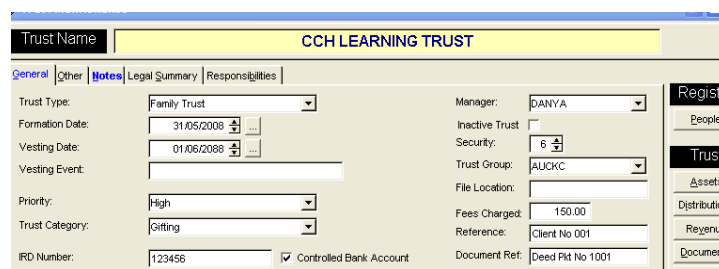
Select Maintenance > Setup Options > System Setup



Go to the Defaults Tab



Type your new name for Trust Status in the Name field.



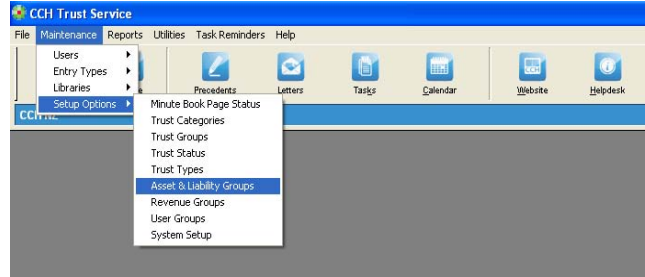
In this example Status has been changed to Priority and the Options High, Medium & Low are set up on the drop down menu

Use the same process to change Category

## Asset & Liabilities and Revenue Groups

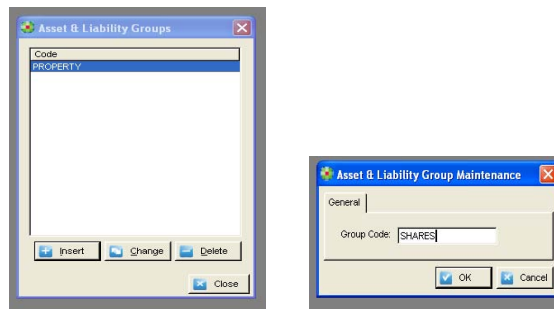
The Trust service comes without any pre-set Asset & Liabilities and Revenue Groups. It is possible to add your own lists.

Select Maintenance > Setup Options > Asset & Liabilities Groups or Revenue Groups

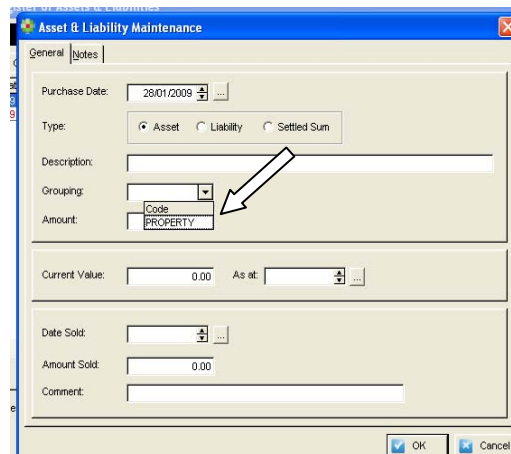


Select Insert to add new Groups (works same way for both sets)

Select Change to edit existing Groups



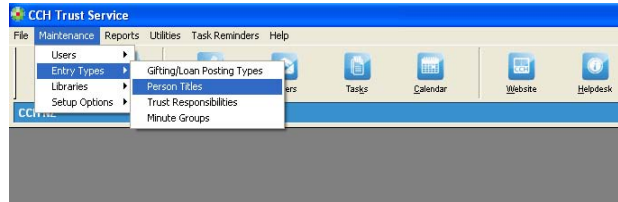
These will now be available when you are adding a posting in the Asset & Liabilities register



## Person Titles

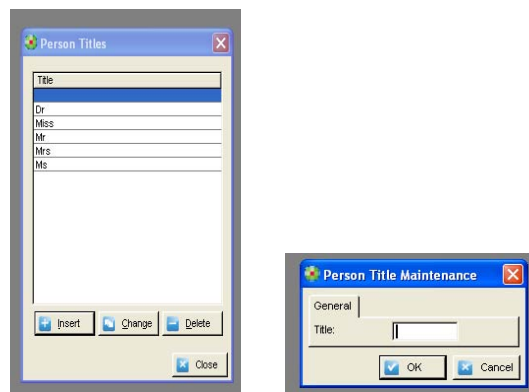
The Trust Service comes with a standard set of Person Titles. It is possible to add to and edit this list.

Select Maintenance > Entry Types > Person Titles



Select Insert to add new Titles

Select Change to edit existing Titles



These will now be available when you are adding a Person Record