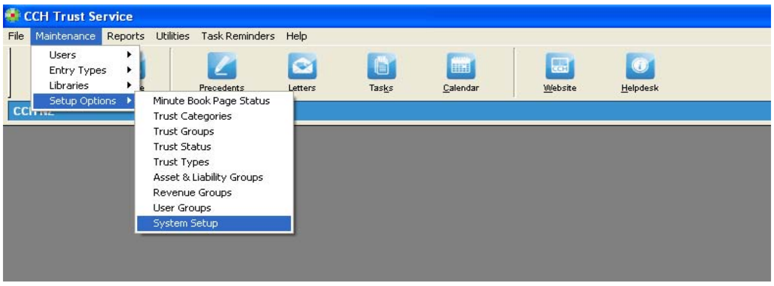
SYSTEM DEFAULTS AND MANDARTORY FIELDS

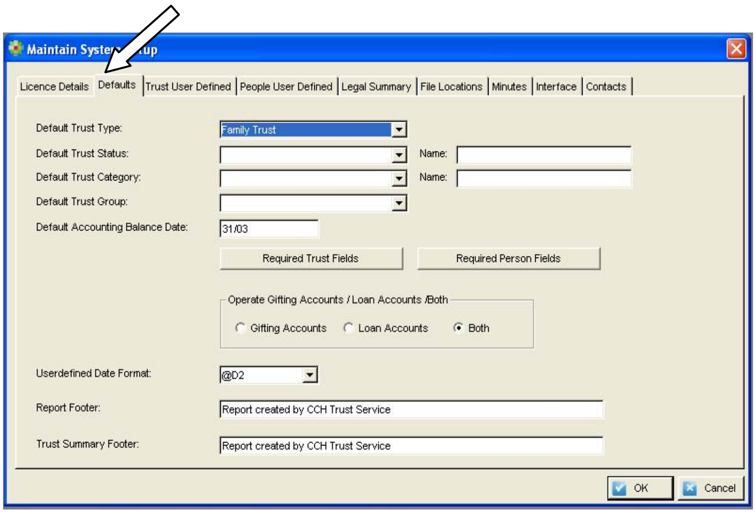
Once you have set up your drop down lists for Trust Type, Trust Status, Trust Category and Trust Group you can set the default entry into these fields for all new Trusts entered.

Information is added into these fields when you add a new Trust but it can be changed by the User, therefore, we recommend you select the most commonly used selection for your defaults.

Select Maintenance > Setup Options > System Setup

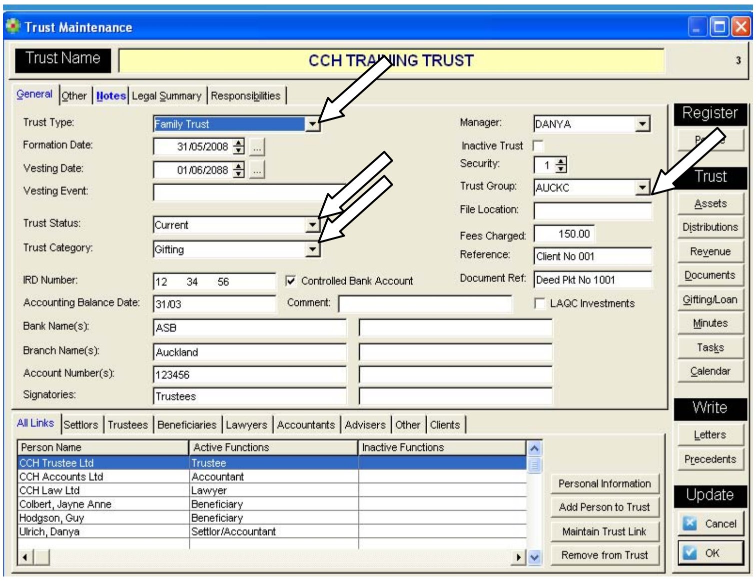


Go to the Defaults Tab



Use the arrow at the end of each field to select the default entry you require

The defaults are now added when you Insert a new Trust

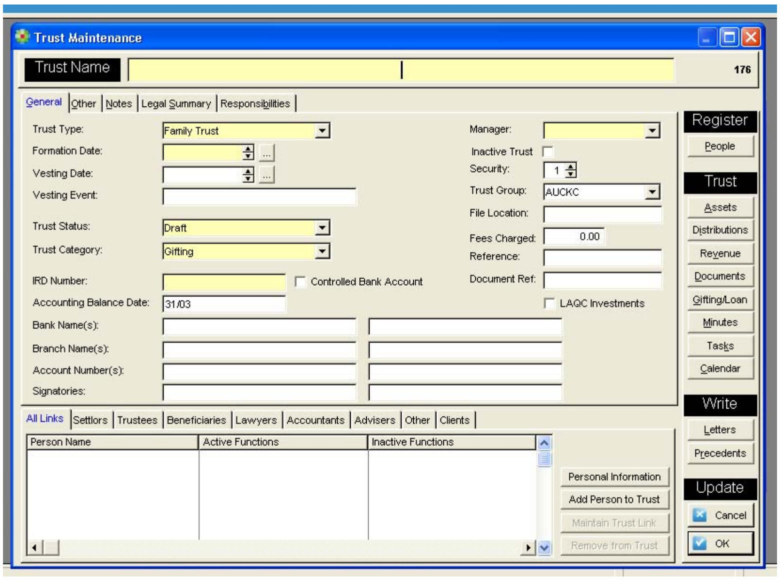


The User can change these at any time by selecting the arrow at the end of the field and selecting another option from the list.

Mandatory Fields

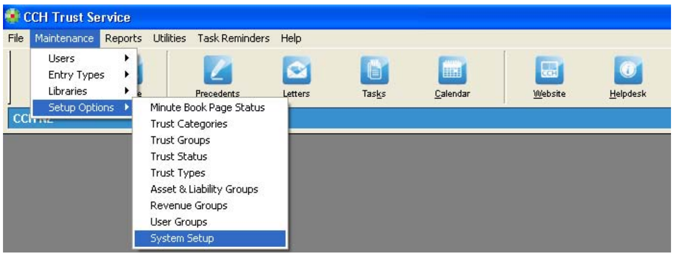
The system can now be configured so that certain fields in the Trust Maintenance Screen & People Maintenance Screen are Mandatory.

Mandatory fields are shown in Yellow.

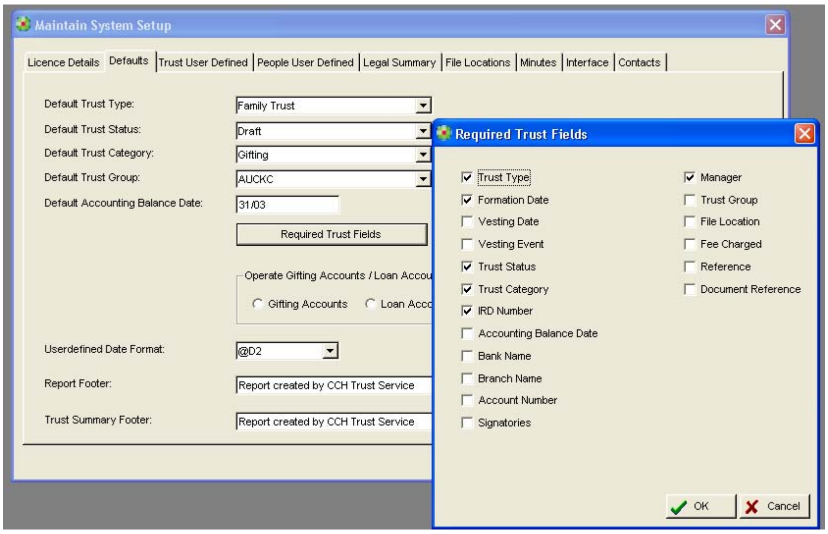


To set mandatory Trust fields

Select Maintenance > Setup Options > System Setup

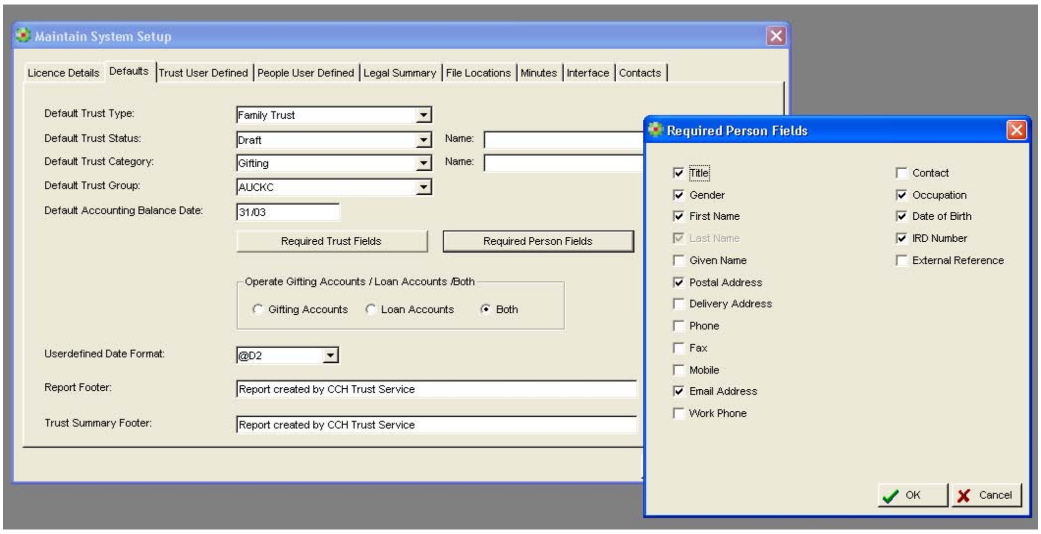


Select Defaults > Required Trust Fields. Tick fields to be mandatory.

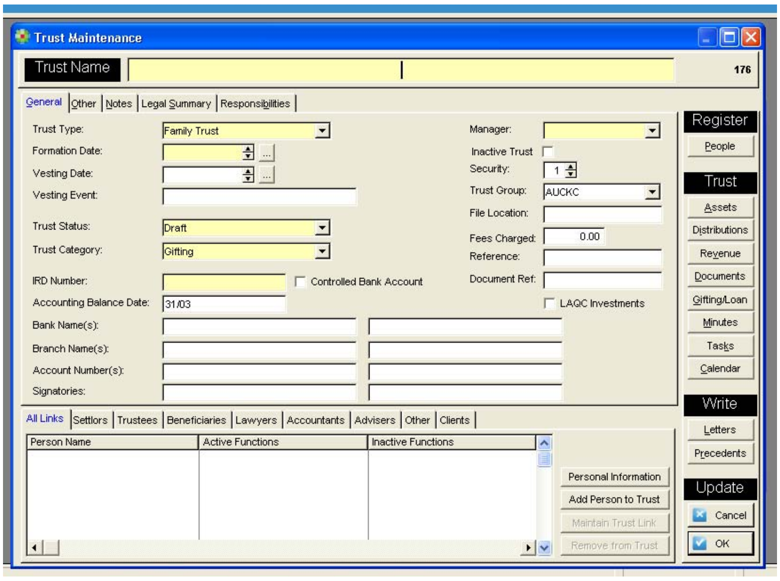


To set mandatory People/Company fields

Select Defaults > Required People Fields. Tick fields to be mandatory



Where a Person data field corresponds with a Company data field the company field will also be mandatory.



When adding a new Trust, Person or Company you cannot select OK to close & save the record until all mandatory fields have been completed.

If an existing record is opened you cannot select OK to close & save the record until all mandatory fields have been completed. On existing records the fields are not coloured.