

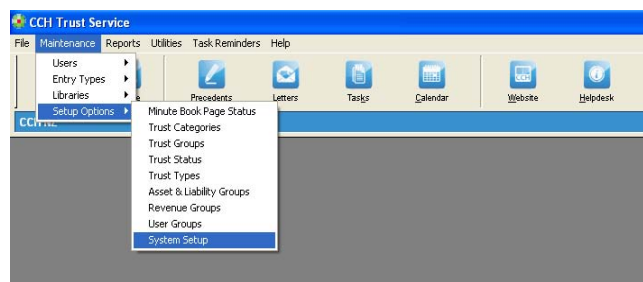
USER DEFINED FIELDS

If you have information you need to record against either a Trust or a Person record and there is not currently an area to enter it you are able to create additional User Defined Fields.

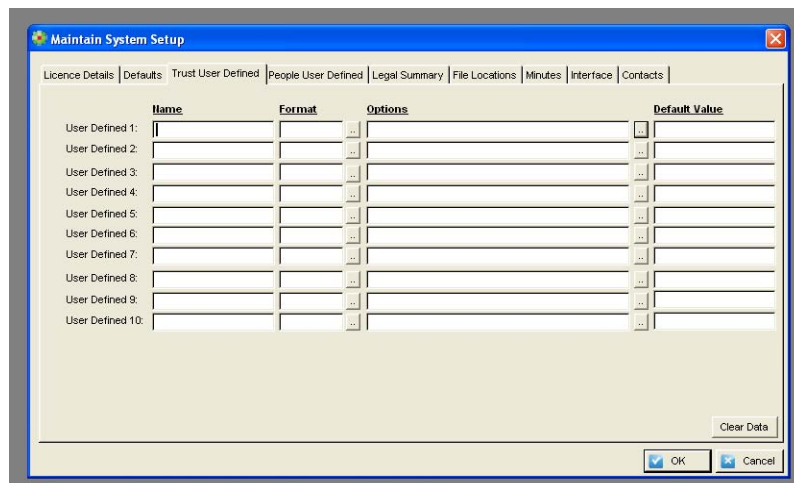
There are 10 User Defined Fields for the Trust Record and 5 User Defined Fields for the Person Record

Adding a Trust (or Person) User Defined Field

Select Setup Options > System Setup



Select Trust (or People) User Defined



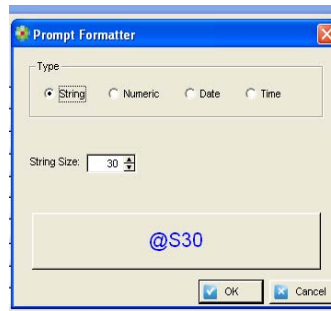
Type the name for your additional field

Select the Format Option; Text, Numeric, Date or Time

Leave Options blank to allow free type or configure a drop down list of Options for Users to select from (see below)

Type or select a Default Value if required

Format Options



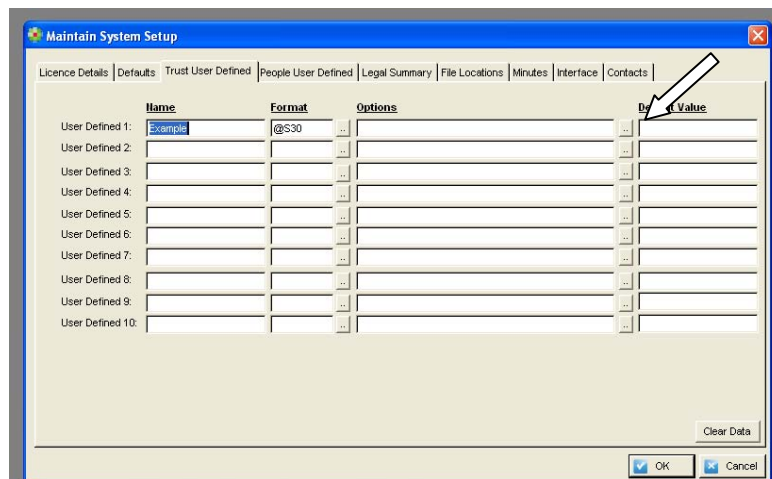
Text = String, select maximum length of text e.g. 30 characters

Numeric = Select decimal point & 'allow negative' or not

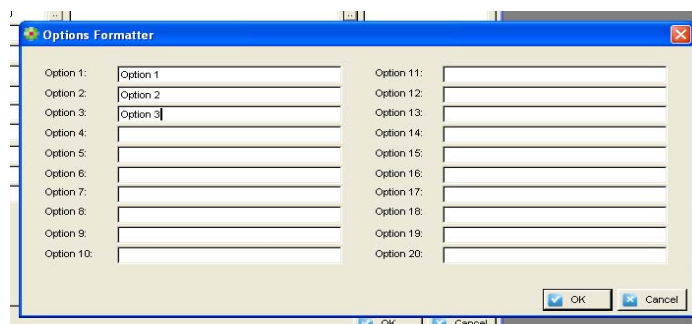
Date = select format

Time = no selection to make

If you want Users to have a drop down to select from, click the small box at the end of Options field.



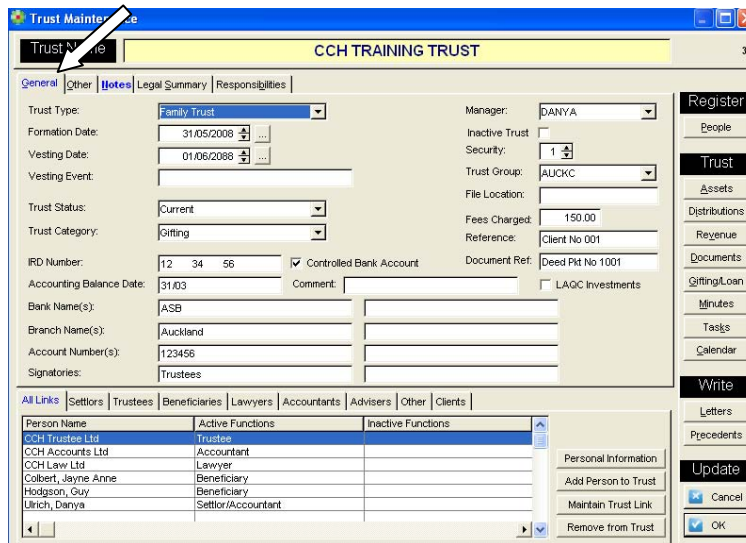
You can now type up to 20 options for them to select from.



Click OK to Save

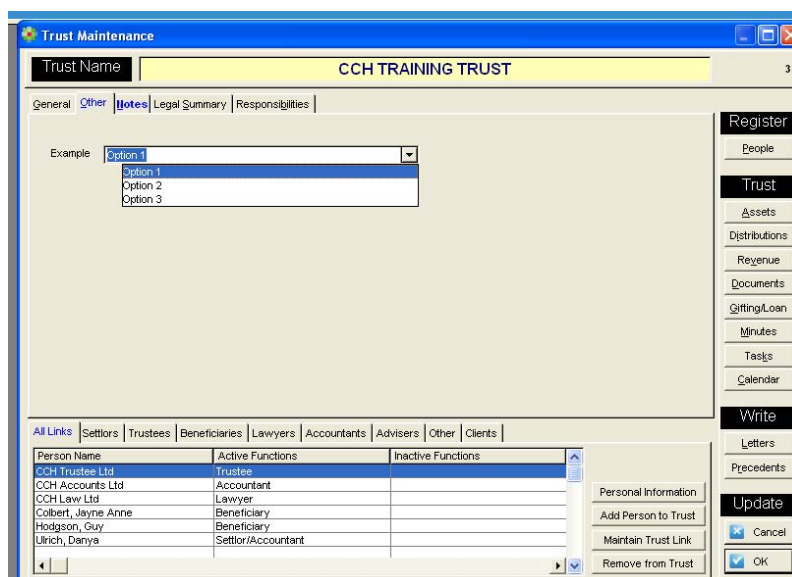
Using the Trust User Defined Fields

If User Defined Fields have been created you will see an Other tab in the Trust Maintenance Screen



Person Name	Active Functions	Inactive Functions
CCH Trustee Ltd	Trustee	
CCH Accounts Ltd	Accountant	
CCH Law Ltd	Lawyer	
Colbert, Jayne Anne	Beneficiary	
Hodgson, Guy	Beneficiary	
Ulrich, Danya	Settlor/Accountant	

Select Other & you will see the User Defined Fields you have created.



The User may accept a default (if set) or use the arrow to access the drop down and select another name.

A date field is free type but must be a valid date as this was the set format

Select OK to Save

Follow the same instructions to create a People User Defined Field