

## Adding Trusts, Adding People & Companies and Assigning Trust Roles

In this session we will learn how to:-

- Add a New Trust
- Add a New Person Record
- Add a New Company Record
- Link People & Companies to the Trust Record
- Maintain Trust & People Records

### Prerequisites for Session 1

- The Trust Service Software is Installed at your office
- You have the latest version, 4.3
- You are comfortable using a PC & Windows Software
- You may have used a Database previously (not essential)

### Preparation for Session 1

- 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