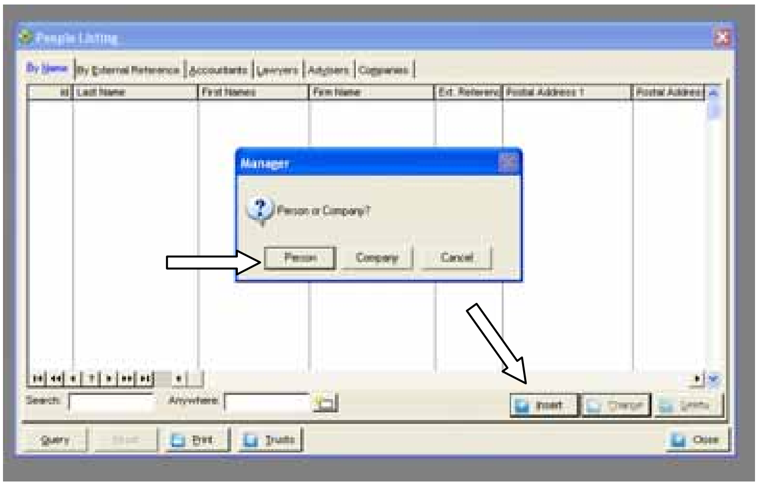
ADDING A PERSON

The following instructions describe how to add an individual person to a Trust.

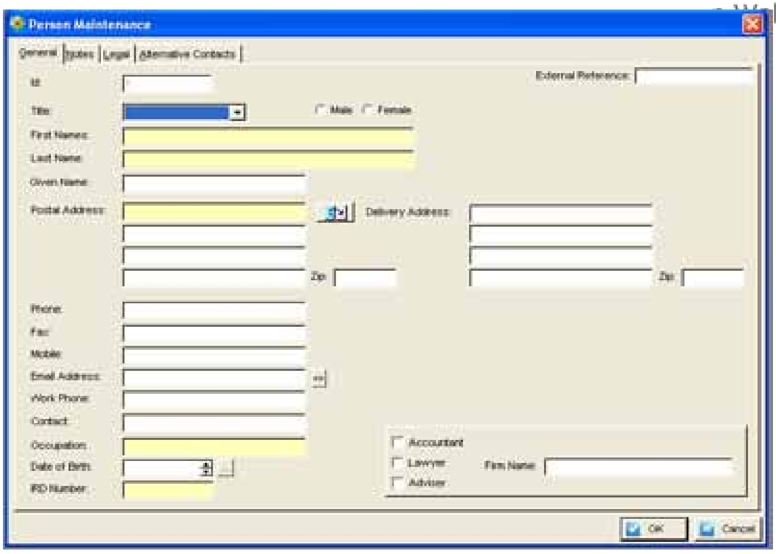
From within the trust maintenance screen.

Select People

Select Insert > Person



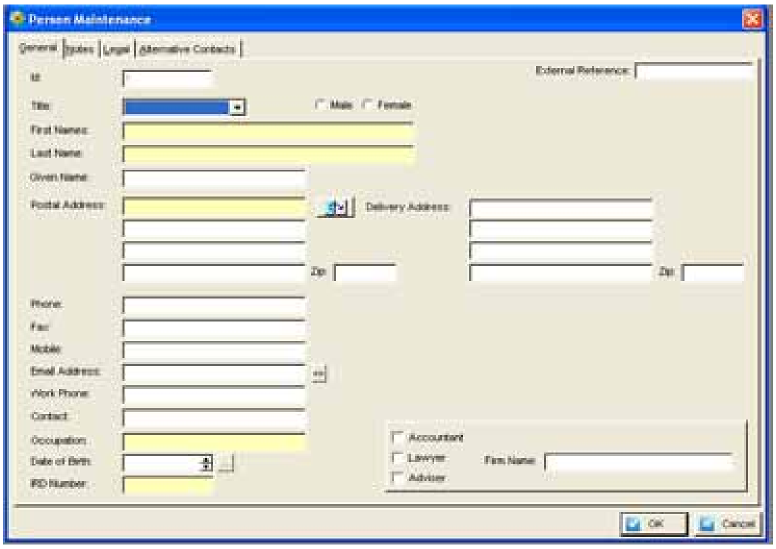
Opens People Screen



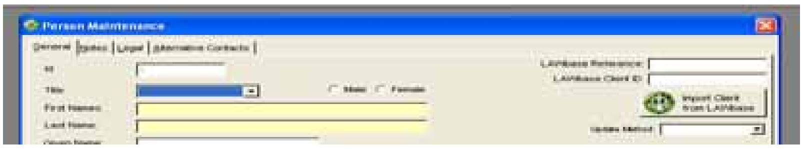
GENERAL

Any mandatory fields will be highlighted in Yellow. You cannot save a Person Record until all mandatory fields have been completed. To learn more about setting mandatory fields see notes on Session 7

Complete all required fields.



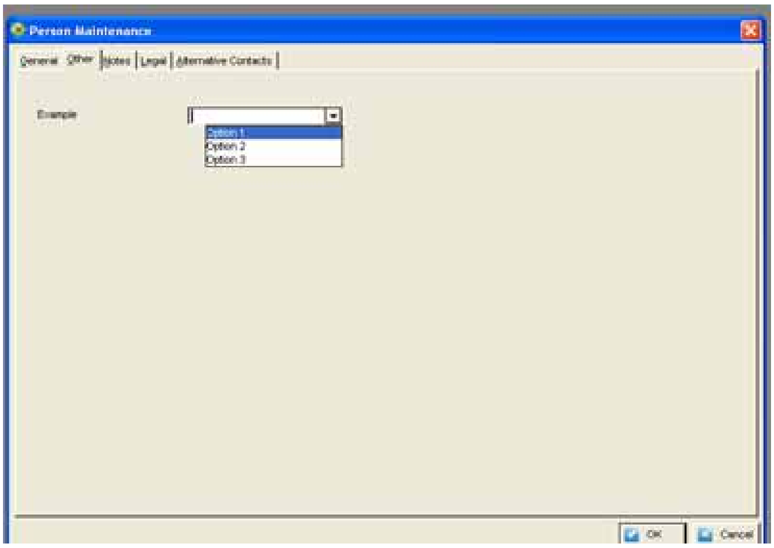
Note: You may have a link to Lawbase or MYOB. This will allow you to import client details directly. You will see the additional button if an interface has been activated



If you do not have this feature but would like to discuss it please contact your Account Manager for more details

OTHER TAB

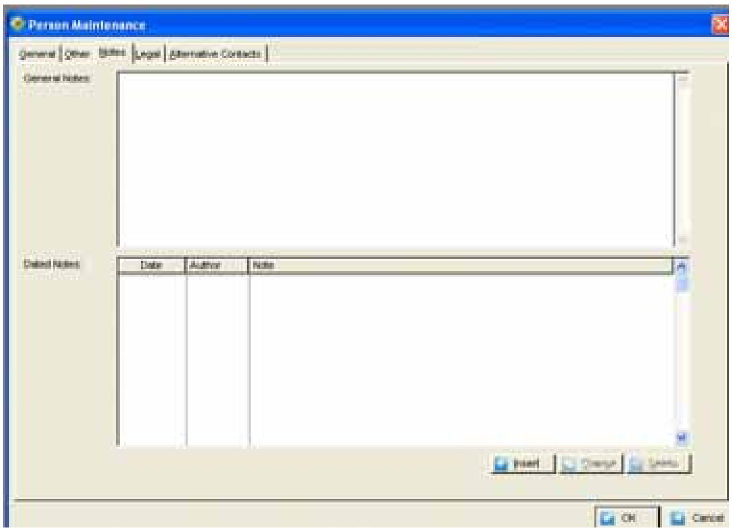
Complete any fields you may have on the 'Other Tab. This tab is only available if fields have been set up.



Any additional fields you find under the Other tab are unique to your company and can be set up as required. To learn more about setting up additional fields see notes on Session 7. If you have no additional fields the Other tab will not be present.

NOTES

You can add a General Note and/or a Dated Note here if required.

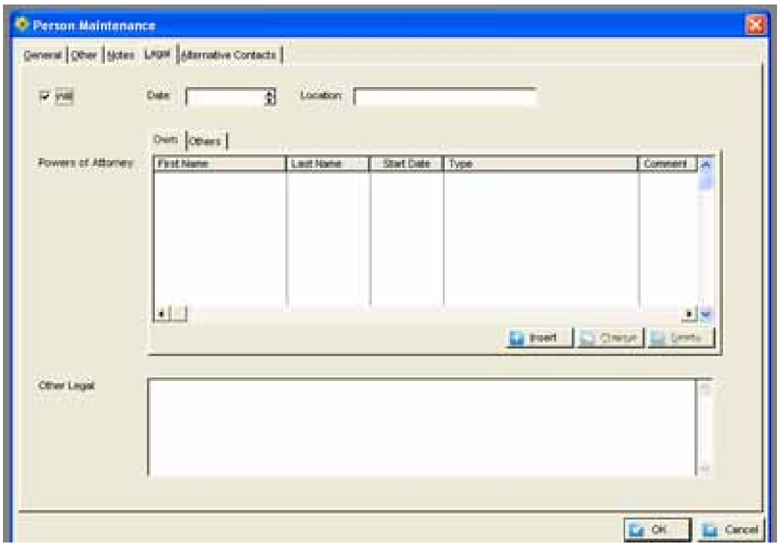


Type directly into General Note. Any notes type here will say visible.

Select Insert, Select Manager, then type Dated Note as required. These notes will display in date order with the most recent at the top.

LEGAL

Check box for Will (if required) & complete details. Date & location do not appear until Will is checked

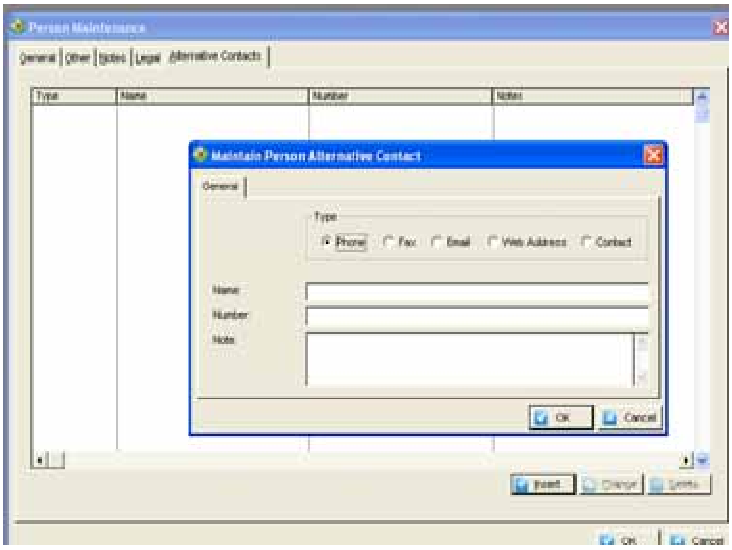


Select Insert to add Power of Attorney. Complete details

Type any further information into Other Legal

ALTERNATIVE CONTACT

Select Insert to add an Alternate Contact (if required)



CLICK OK TO SAVE