

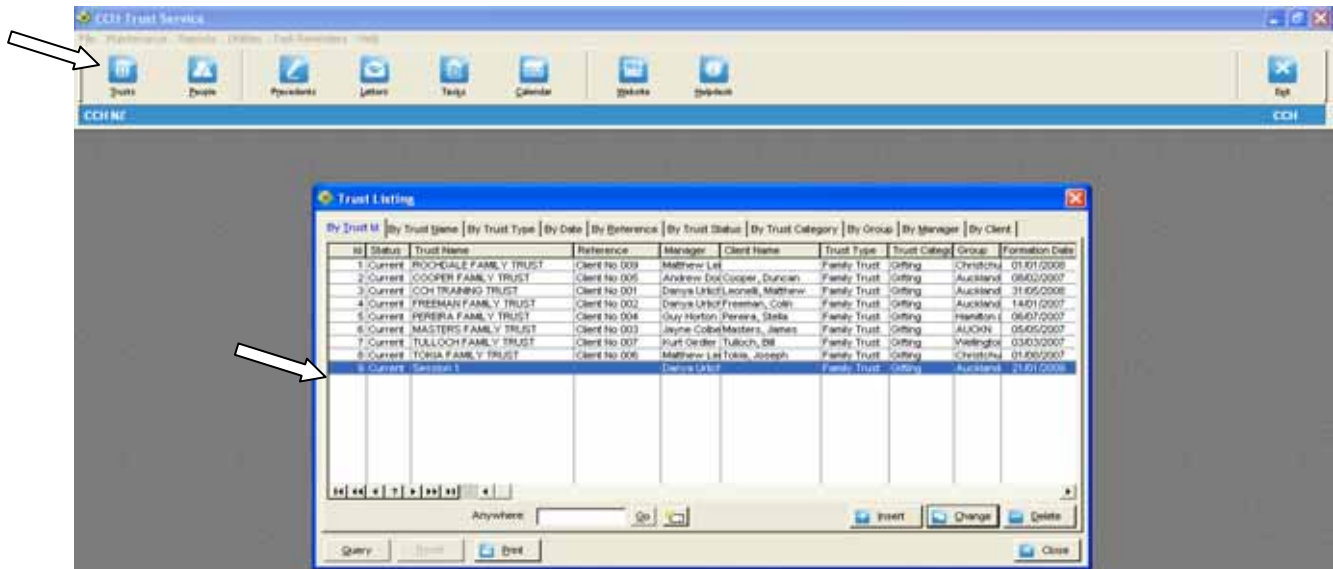
SESSION 1.4

LEVEL 1

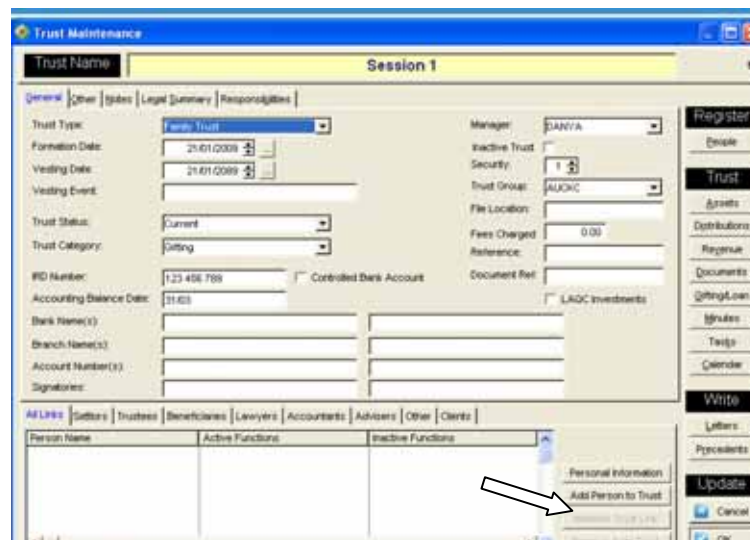
ASSIGNING ROLES WITHIN THE TRUST

Before Assigning Roles ensure all Trust information is complete and all People & Companies related to the Trust have been added to the database

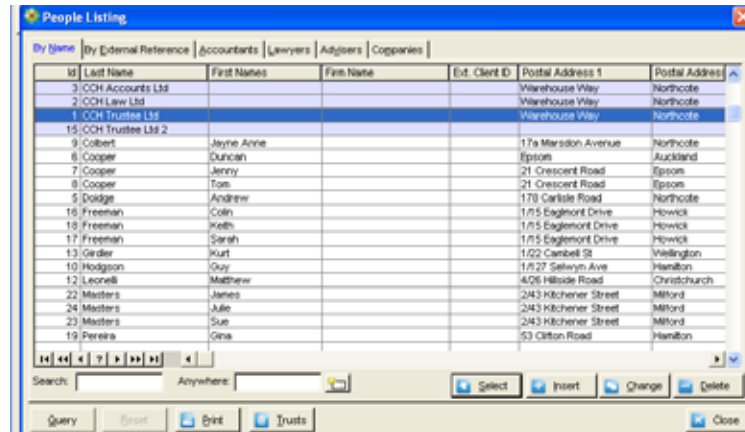
Select Trust Shortcut, then select Trust from List (double click or select Change)



Select Add Person to Trust

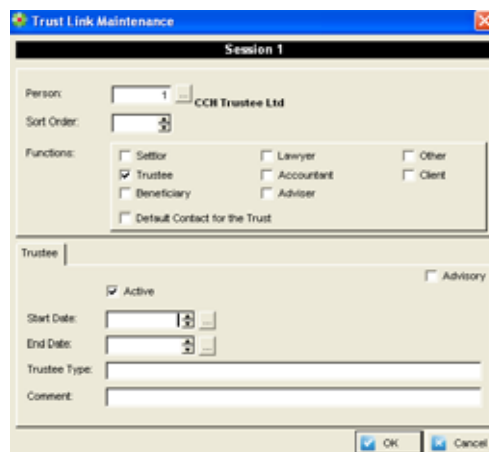


Select Person from List (double click or highlight and hit Select)



You can use the search function at the bottom left

The Trust Link Maintenance screen is use to manage a persons link to a trust.



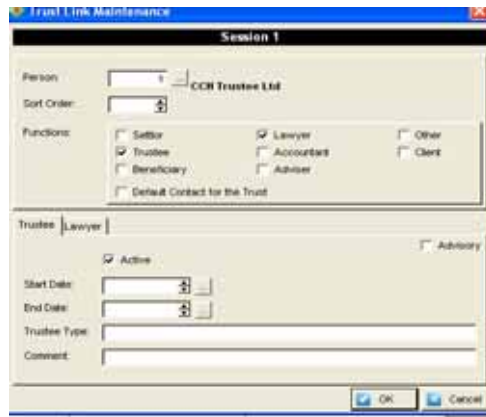
The Person field populates with the ID code from the people listing screen.

Sort order allows you to chose who appears first when creating documents that contain lists of people.

Functions allows you to select the role(s) this person is to play in the Trust. To select a role, single in the box next to the role name and a tick will appear in the box.

Note: A person can be attached to more than one role. For each role that is selected a new tab will appear at the bottom of the screen.

Tip: If you intend to use mailmerge to create client letters it is a good idea to check the Client box for those people who are clients of your company.



Some tabs have extra information but they all contain the following:

Active box will default with a tick to mark the role as active. If a person becomes no longer attached to a trust is recommended that you do not delete them but make them inactive.

Add Start Date, End Date. It is recommended that you do put in a start date for each role. Some reports and precedents rely on this information.

Comments is a free text field that allows you add in any text you require.

Those tabs with different fields are self-explanatory and can be filled as required.

CLICK OK TO SAVE



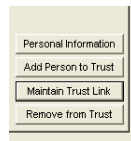
MAINTAINING RECORDS

Once a link has been established you can use the following buttons to maintain the link.

Use Personal Information to view or edit Person/Company information

Use Maintain Trust Link to amend Roles within the Trust - it is advisable to make a Role Inactive (uncheck the active box) rather than remove the person from the Trust entirely

Use Remove from Trust to remove a Person/Company from that Trust permanently. No record will be kept of them ever having been involved so consider using Inactive function if appropriate



CLICK OK TO SAVE

