

Reporting & Queries

In this session we will learn how to:-

- Use the Trust Reports
- Use the People Reports
- Use the Gifting Reports
- Use the Task Reports
- What is in the Set Up Reports
- Create your own Customised Trust Reports
- Create your own Customised People Report
- Run a query on the Trust Service database

Prerequisites for Session 7

- The Trust Service Software is Installed at your office
- You have the latest version, 4.3
- You are familiar with the basic functions in the Trust Service Software, adding a Trust, maintaining records, etc.
- You are familiar with using database's in general

Preparation for Session 7

- 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