

SESSION 5.2

LEVEL 1

REPORTING

The Trust Service comes with a standard set of People Reports. You can also set up your own reports and export data to excel for more detailed reporting.

People Reports

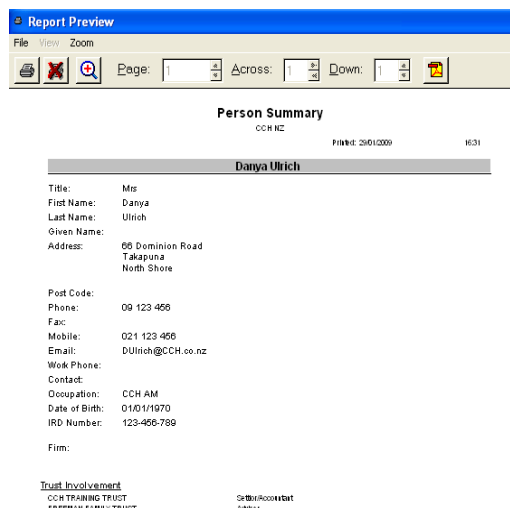
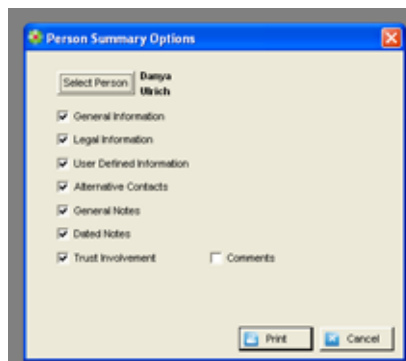
Select Reports > Persons. You can now see a list of the People Reports Available





People Summary Report

Select Reports > Persons > Person Summary.

Select the Person you wish to report on & select the information to wish to include



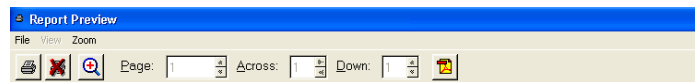
You can send the report to the printer  or save it as a PDF  which can then be attached to an email.

People Listings

Select Reports & Select Person Listing



Select the Function you wish to report on, e.g Trustee's, Settlor's, or All
 Select a Date of Birth Range if appropriate, e.g to exclude minors





Person Listing

CCH NZ

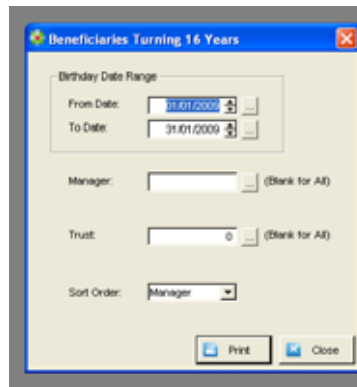
Printed: 2/09/08 14:40

Last Name	First Name	Address
Armstrong	Amanda	
CCH Accounts Ltd		Warehouse Way, Northcote
CCH Law Ltd		Warehouse Way, Northcote, Auckland
CCH Trustee Ltd		Warehouse Way, Northcote, Auckland
Colbert	James	243 Kitchener Street, Milford, Auckland
Colbert	Jayne	243 Kitchener Street, Milford, Auckland
Colbert	John	243 Kitchener Street, Milford, Auckland
Colbert	Julie	243 Kitchener Street, Milford, Auckland
Doidge	Andrew	178 Carlisle Road, Northcote
Doidge	Doris	178 Carlisle Road, Northcote
Doidge	Jimmy	178 Carlisle Road, Northcote
Grider	Kurt	1/22 Caribell St, Wellington
Hodgson	Gina	113 Sunnybrae Road, Glenfield
Hodgson	Guy	113 Sunnybrae Road, Glenfield, Auckland
Leonelli	Matthew	426 Hillside Road, Christchurch
Rogers	Karen	CCH NZ
Staurton	Joanna	10 Pine Ridge Terrace, Takapuna
Stephenson	Antony	38 Beachhaven Road, Beachhaven
Stephenson	Stella	38 Beachhaven Road, Beachhaven
Ulrich	Denya	66 Dominion Road, Takapuna, North Shore
Watson	Emma	

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Beneficiaries Turning 16 Years

Select Reports & select Trust Listing with Contact Details

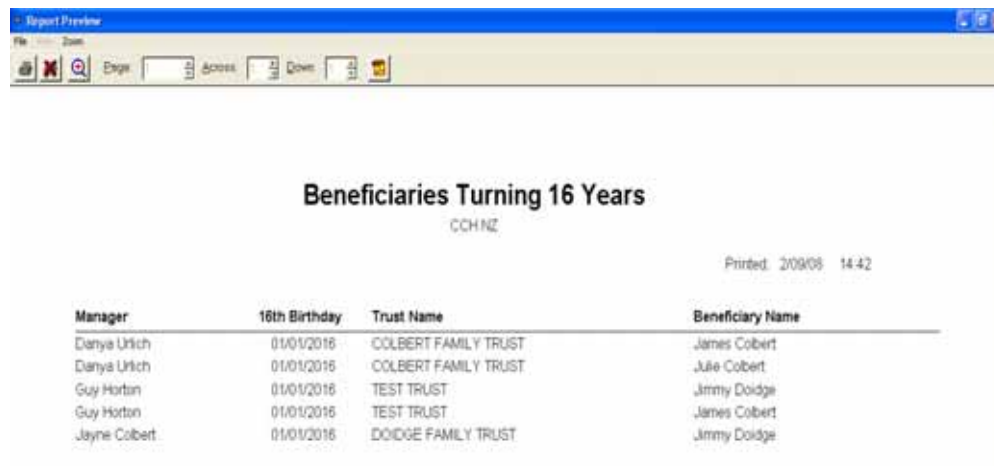


Select the required Date Range



Select a specific Manager or leave blank for All

Select a specific Trust or leave blank for All

Select the Sort Order for your Report



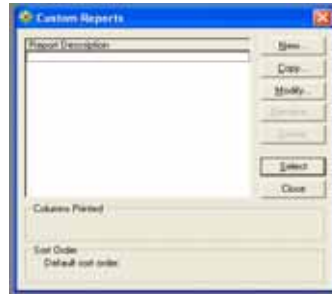
Manager	16th Birthday	Trust Name	Beneficiary Name
Danya Urlich	01/01/2016	COLBERT FAMILY TRUST	James Colbert
Danya Urlich	01/01/2016	COLBERT FAMILY TRUST	Jule Colbert
Guy Horton	01/01/2016	TEST TRUST	Jimmy Doidge
Guy Horton	01/01/2016	TEST TRUST	James Colbert
Jayne Colbert	01/01/2016	DOIDGE FAMILY TRUST	Jimmy Doidge

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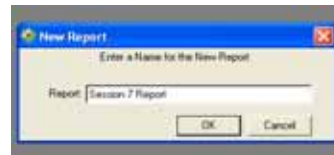
Person Listing (User Defined)

The User Defined listing allows you to specify what information you would like displayed on your listing

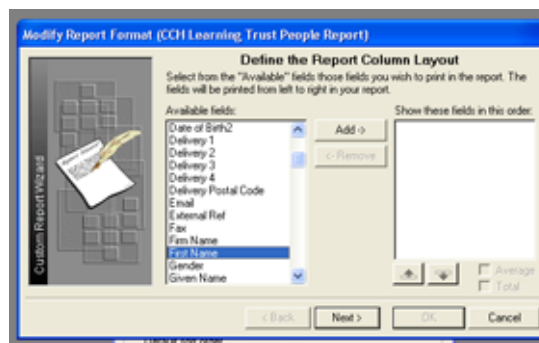
Select Reports > Persons > Person Listing (User Defined)



Select New & type the name of the Report. Select OK



You can now select the information you want to appear on your report
 Highlight name of field, select Add



You can add 4 or 5 items before you run out of space to fit the information onto a page. If you need more than 5 items you should Export the information into Excel – See notes on Session 10

Columns will appear across the page of your report in the same order they appear down this list.



To change the order of the list, highlight field name & select the up or down arrow beneath the list.

Your report is now ready to run.





Ensure your report is highlighted then Select.



Person Listing
CCH NZ

Printed: 2/09/08 14:50

Id	First Name	Last Name	Phone
3		CCH Trustee Ltd	09 1234 4567
4	Amanda	Armstrong	
5	Emma	Watson	
6	Andrew	Doidge	09 123 456
7	Jayne	Colbert	09 123 456
8	Danya	Ulrich	09 123 456
9	Guy	Hodgson	09 123 456
10	Kurt	Girdler	09 123 456
11	Matthew	Leonelli	09 123 456
12		CCH Accounts Ltd	09 123 456
13	Doris	Doidge	09 123 456
14	Jimmy	Doidge	
15	John	Colbert	09 123 456
16	James	Colbert	09 123 456
17	Julie	Colbert	021 123 456
18		CCH Law Ltd	
19	Antony	Stephenson	09 123 456
20	Stella	Stephenson	09 123 456
21	Joanna	Staunton	09 123 456
22	Gina	Hodgson	09 123 456
23	Karen	Rogers	123 456

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