

SESSION 5.5

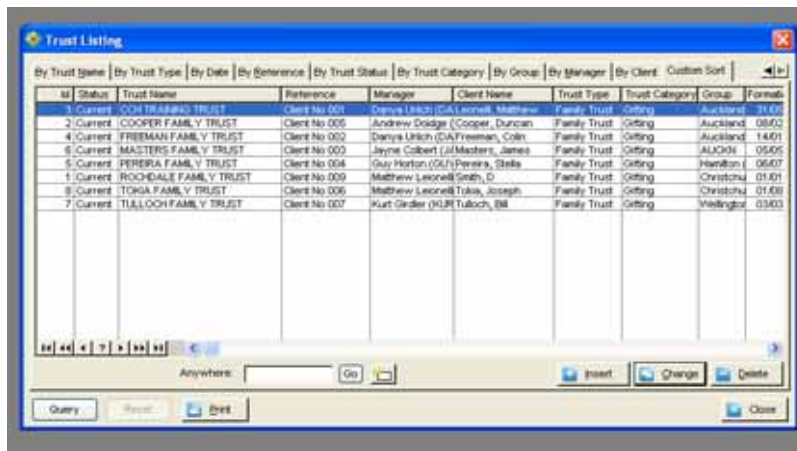
LEVEL 1

QUERIES

It is possible to run a query on the database to view only a selected section of your data on the trust listing.

For example: This list below currently shows all Trusts. I can run a query that will show me just those with a draft status.

Once you have a large list of Trusts this can be a valuable tool



ID	Status	Trust Name	Reference	Manager	Client Name	Trust Type	Trust Category	Group	Postal
3	Current	ROCHEALE FAMIL Y TRUST	Client No 003	Chris Miles (C/Miles, Chris)	Matthew Leonard Smith, D	Family Trust	Getting	Auckland	0600
2	Current	COOPER FAMIL Y TRUST	Client No 005	Andrew Dodge (C/Cooper, Duncan)	Andrew Dodge (C/Cooper, Duncan)	Family Trust	Getting	Auckland	0600
4	Current	FREEMAN FAMIL Y TRUST	Client No 002	Danya Urlich (C/Masters, Colin)	Danya Urlich (C/Masters, Colin)	Family Trust	Getting	Auckland	1401
6	Current	MASTERS FAMIL Y TRUST	Client No 003	Jayne Gilbert (J/Masters, James)	Jayne Gilbert (J/Masters, James)	Family Trust	Getting	Auckland	0505
5	Current	PEREIRA FAMIL Y TRUST	Client No 004	Guy Horton (G/H/Perera, Stella)	Guy Horton (G/H/Perera, Stella)	Family Trust	Getting	Hamilton	0607
1	Current	ROCHEALE FAMIL Y TRUST	Client No 009	Matthew Leonard Smith, D	Matthew Leonard Smith, D	Family Trust	Getting	Christchurch	0101
8	Current	TOKIA FAMIL Y TRUST	Client No 006	Matthew Leonard Tokia, Joseph	Matthew Leonard Tokia, Joseph	Family Trust	Getting	Christchurch	0108
7	Current	TULLOCH FAMIL Y TRUST	Client No 007	Kurt Greider (K/Tulloch, Bill)	Kurt Greider (K/Tulloch, Bill)	Family Trust	Getting	Wellington	0303

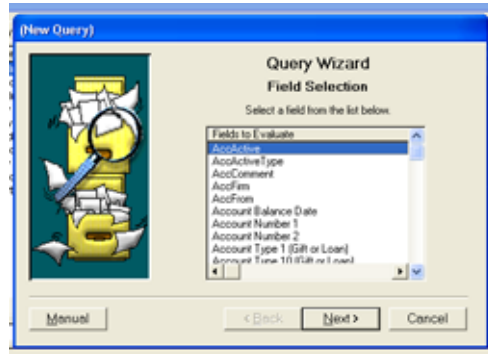
Select Query



You may already have some examples set up on this list.

Select Insert to add a new Query

You can now select the criteria for your query - in this example I will ask for only Trusts with a Status of Draft.



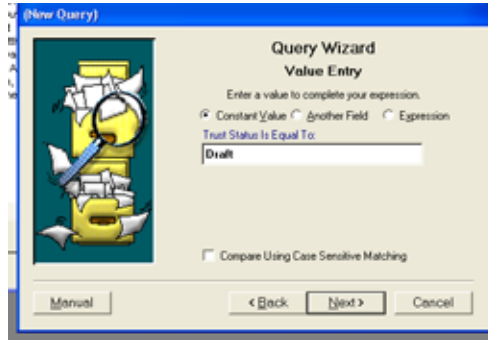
For this example we will highlight Trust Status. Select Next



Select the Rule for your Query



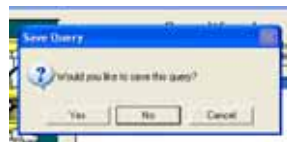
In this example 'Status' is Equal to 'Draft'



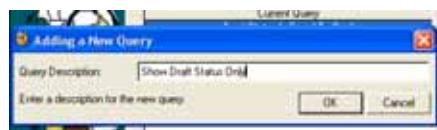
Select Finish



You will be asked if you want to Save the Query



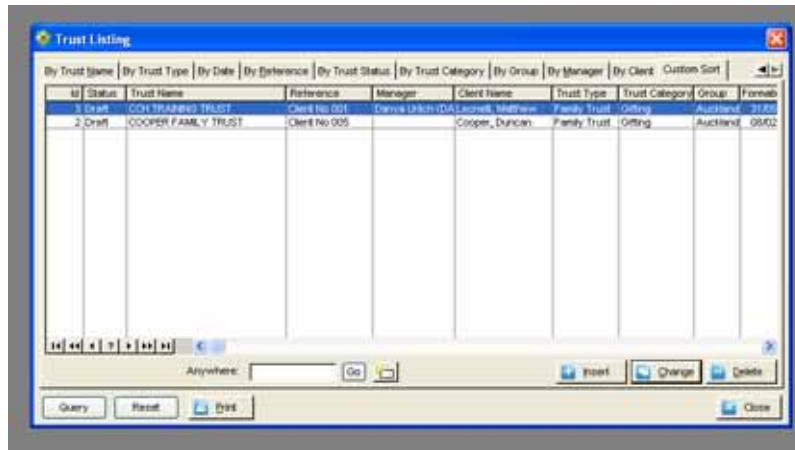
You can then give the Query a Name



The Query will be run automatically when you select OK

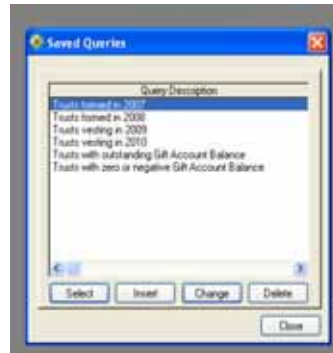
The list now shows only those Trust Records with the Status of Draft

Select Reset to clear the query



The Query can be run at any time

Select Query to show a list of Saved Queries



Select the Query you wish to run
 Select Reset to Clear the Query

Other Useful Examples

Manager	Is Equal to	[your manager name]	Shows all Trusts owned by particular Manager
Gift Balance	Is Less Than	27,000	Shows all Trusts with Less than \$27,000 to Gift
Formation Date	Is Greater Than	30/07/08	Shows all Trusts Formed in August 08
	AND Is Less Than	31/08/08	