

Course/Workshop Name

Level

Presentation Style

COURSE OUTLINE

SynergySoft Trust

Essentials

Webinar

Who should Attend


This course is designed to provide a new user of this system with an overview of the SynergySoft Trust system. It can also be used as a refresher course for those already familiar with the software.

Prerequisites

- Knowledge of SynergySoft
- Fundamental knowledge of computers
- Fundamental knowledge of MS word

Course Content

- **Trust Maintenance Programs and Menu**
- **Creating Trust Types**
 - Code
 - Name
 - Income & Expenditure General Ledger Account
 - Bank
 - Saving the Record
 - Trust Items Grid
- **Trust Maintenance**
 - Creating a Trust Item
- **Financials Transactions**
 - Details
 - Financial Details
 - Refunds
- **Reports**
 - Trust Number Reports
- **Removal of Finalised Trusts**



To lodge your Booking or for further information please contact Ann Bull on (08) 9315 7009 or email ann.bull@itvision.com.au