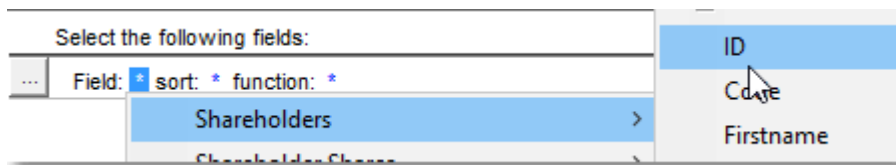
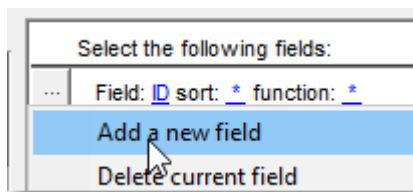


Add fields in the top panel

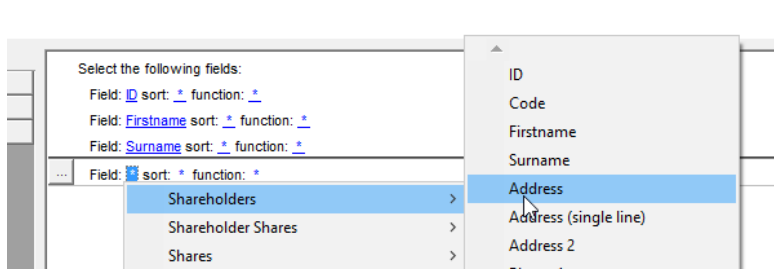
Click on * to bring up fields list



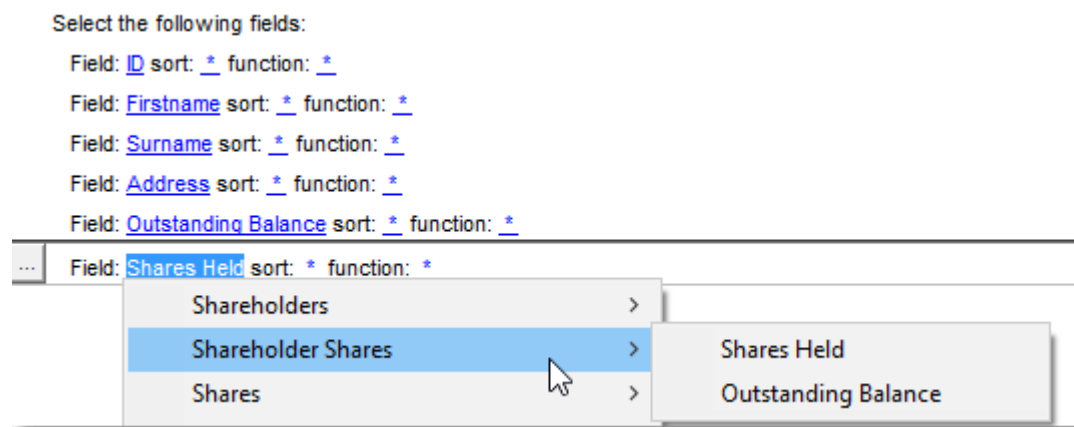
After adding field, click [...] and click Add a new field



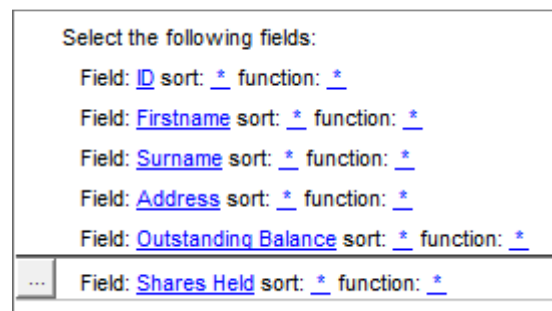
Repeat to add shareholder fields until completed



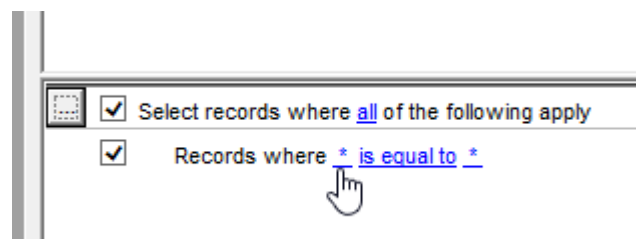
Example: To show outstanding balance is to add the following fields:



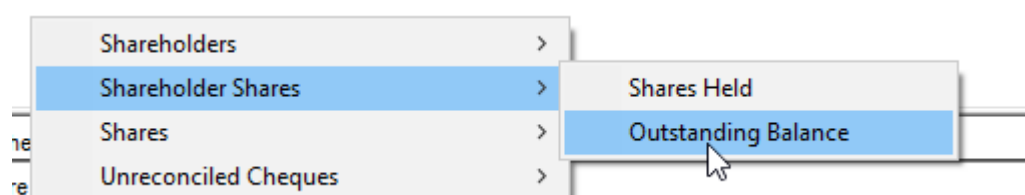
Example: Result for the top portion:



Now to add criteria – go to footer section and click *:

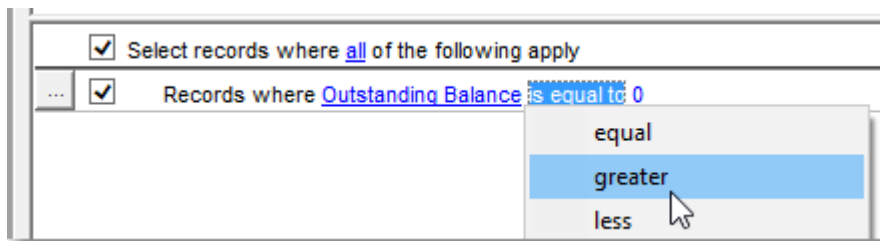


Select field – in this example we want all outstanding balances more than \$0

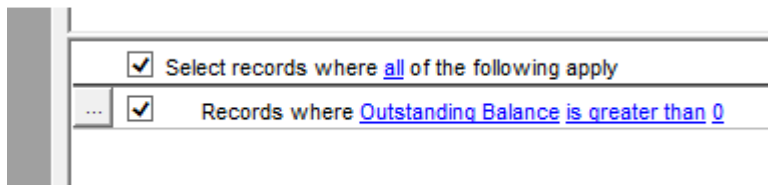


Click is equal to

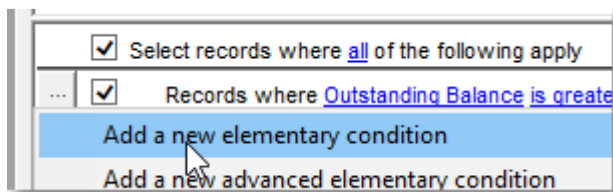
Select greater



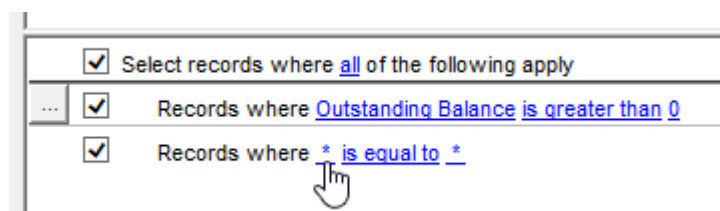
Result: criteria = outstanding balance is greater than 0



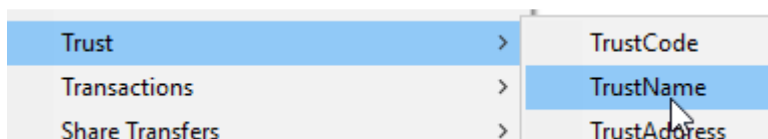
To add more criteria, click on [...] and select Add a new elementary condition



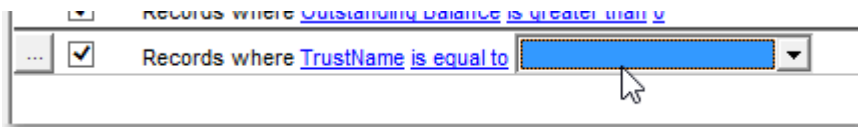
Click *



Select



Once TrustName is added, can select trust from drop down list



Click



Click

