GDMA Manual

Ad-hoc Reporting Example



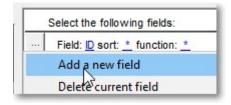


Add fields in the top panel

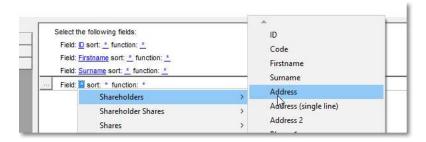
Click on * to bring up fields list



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:

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Select the following fields:

Field: ID sort: *_ function: *_

Field: Firstname sort: *_ function: *_

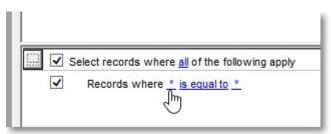
Field: Surname sort: *_ function: *_

Field: Address sort: *_ function: *_

Field: Outstanding Balance sort: *_ function: *_

Field: Shares Held sort: *_ function: *_
```

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



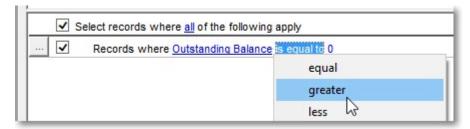
Select field – in this example we want all outstanding balances more than \$0



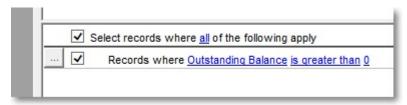


Click is equal to

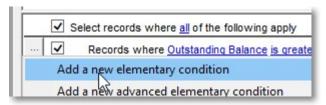
Select greater



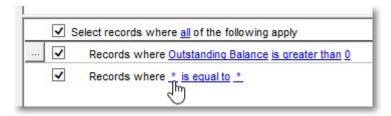
Result: criteria = outstanding balance is greater than 0



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



Click *

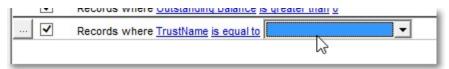


Select





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



Click



Click



