

# TRUST SERVICE TRAINING - LEVEL 3

## SESSION 10.2

### EMAIL

It is possible to email directly to an individual or to groups of people

#### Preparation

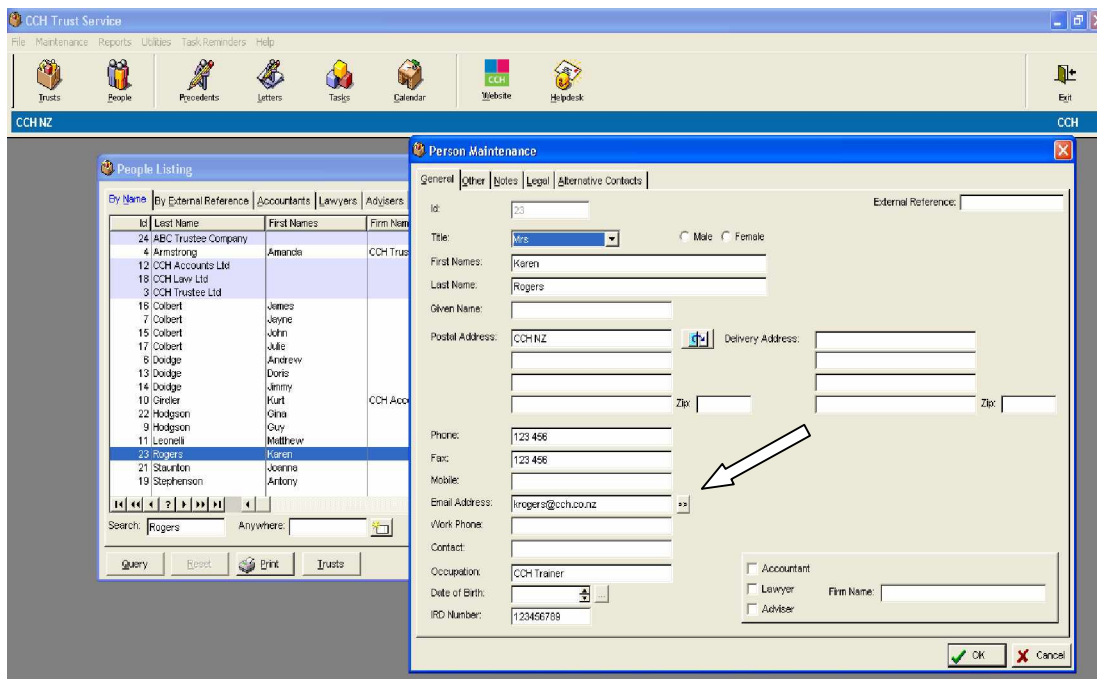
Ensure you have collected and entered email information in your database

Trust Service is compatible with Microsoft Outlook

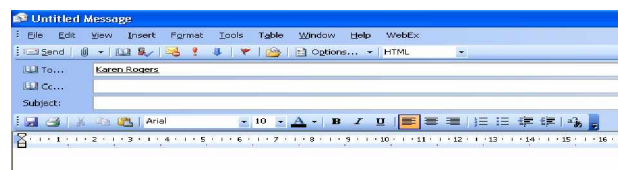
#### Email to an Individual

Open the Trust Service

Select People and Select the Person you wish to email from the list



Select the icon next to the email address to open Outlook (if not already open). A blank email will be opened with the email address in the 'To' field



You can now type and send your email.

## Email to Groups of People from the Database

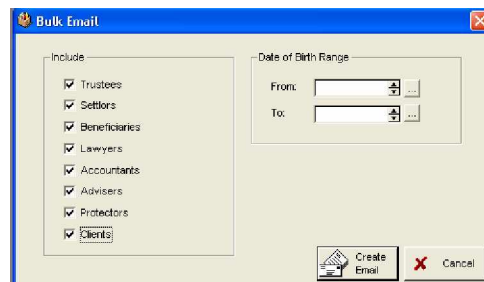
Select Utilities, Select Bulk Email



Select who should receive this email

Use the Date of Birth Range to exclude minors (beneficiaries) if necessary

Select Create Email



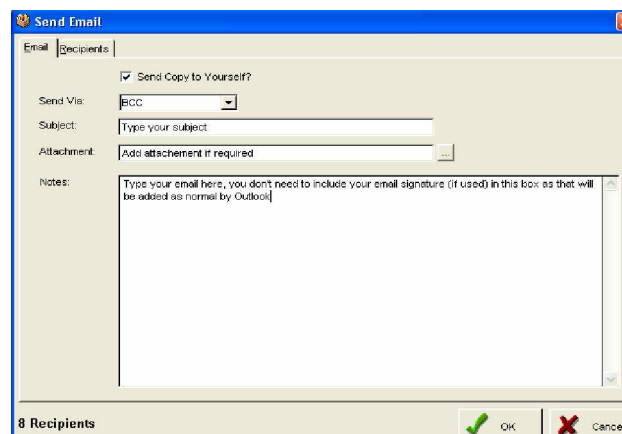
Select 'Send Copy to Yourself' if required

Select Send Via: Options are 'To' 'BCC' or 'CC'. If you select 'To' or 'CC' all recipients will be able to see each others email addresses. Use 'BCC' to protect privacy, this is the default setting.

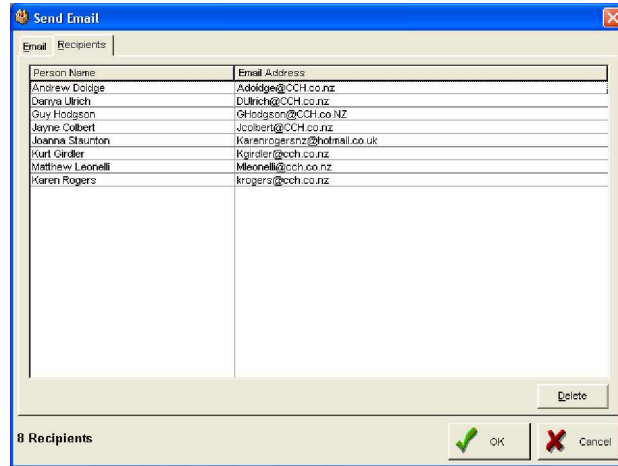
Type your subject line

Add any attachments you require

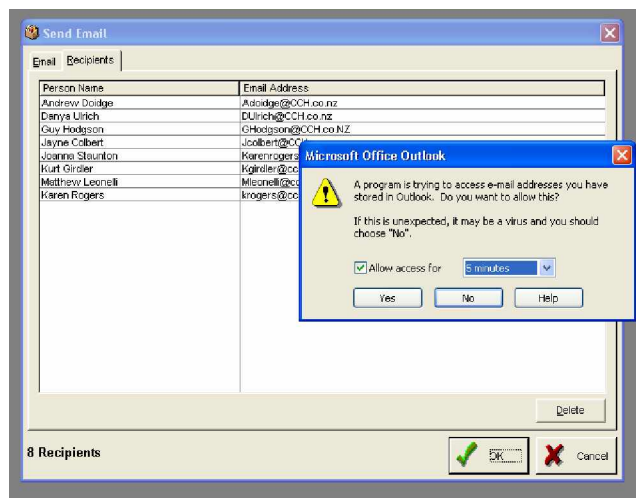
Type your email



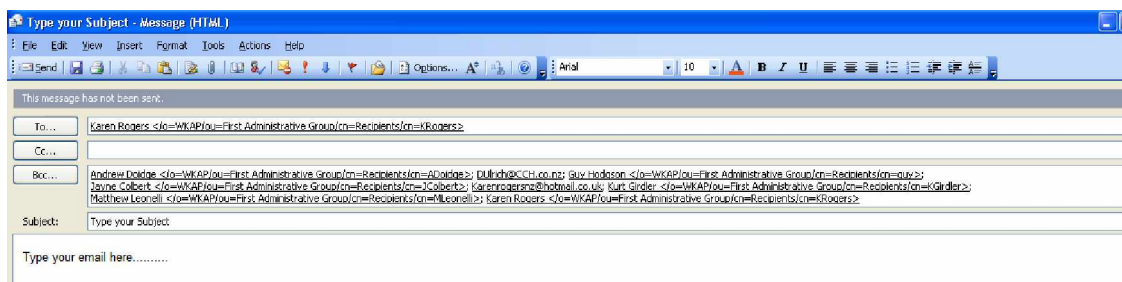
Select Recipients to see who will receive this email  
 You can delete individuals from this list if necessary



Select OK to open Outlook and create email  
 You may get a warning message asking you to authorise the connection to Outlook.



Outlook will now open and your email will be ready to send



Recipients will be shown in BCC field and will not be able to see each others emails if BCC is used.