

# TRUST SERVICE TRAINING - LEVEL 3

## SESSION 10

### REVIEW

In this session we learned how to:-

- Create a Mailmerge from the Trust Service
- Create a Bulk Email from the Trust Service
- Export data from Trust Service to Excel

### Action Points/Follow Up

Question	ü	Session Required	Date
Do I have the TMSDATA.CSV file.		Email Krogers	
Can we use Mail Merge?		Discuss Internally	
Can we use Individual or Bulk Email?		Discuss Internally	
Can we use Export		Discuss Internally	
Has this session highlighted the need for Customized Trust Service Training?		Discuss with CCH	

For further help:

Select Help to access the Trust Service Help Files



Visit [WWW.CCH.CO.NZ/TRAINING](http://WWW.CCH.CO.NZ/TRAINING) for training notes on previous sessions, notes are posted approx 7 days prior to the next session. You can access training notes for session you are not attending.

Contact Support 0800 500 224 if your system is not working

Email [Krogers@CCH.co.nz](mailto:Krogers@CCH.co.nz) if you have any 'how to' questions. Emails are answered 1day per week only, usually on Thursday or Friday