

TRUST SERVICE TRAINING - LEVEL 3

SESSION 10

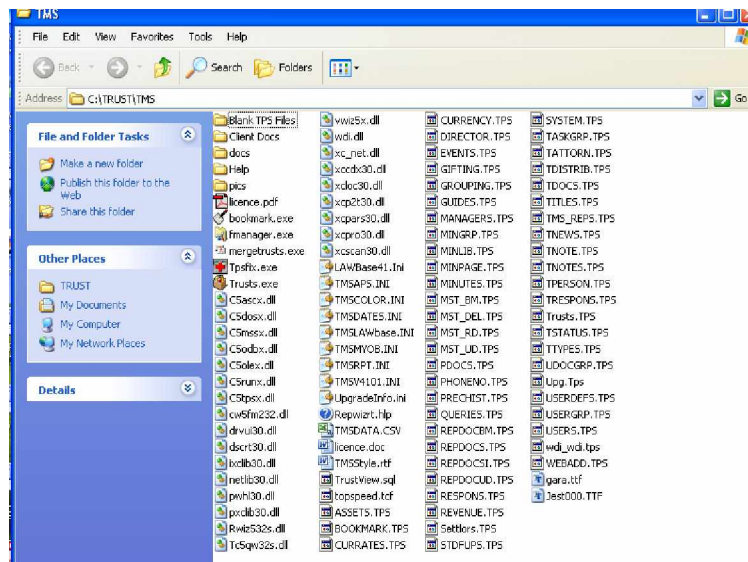
OVERVIEW

In this session we will learn how to:-

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

Prerequisites for Level 3, Session 10

- The Trust Service Software is Installed at your office
- You have the latest version, 4.2
- You are familiar with the Trust Service Software, adding a Trust, maintaining records, creating documents from Standard Templates & using the Minute Book
- You have a general understanding of the principles of Mailmerge
- You are using Microsoft Outlook for email
- You have the TMSDATA.CSV file in your TMS folder



Preparation for Level 3, Session 10

- Print the Session Notes.
- Set up Webex Meeting Manager on your PC, ideally the day before the session in case you have any difficulties
- Dial into the Meeting, using the Link & Password provided 5mins prior to start time