SESSION 10.0 LEVEL 3

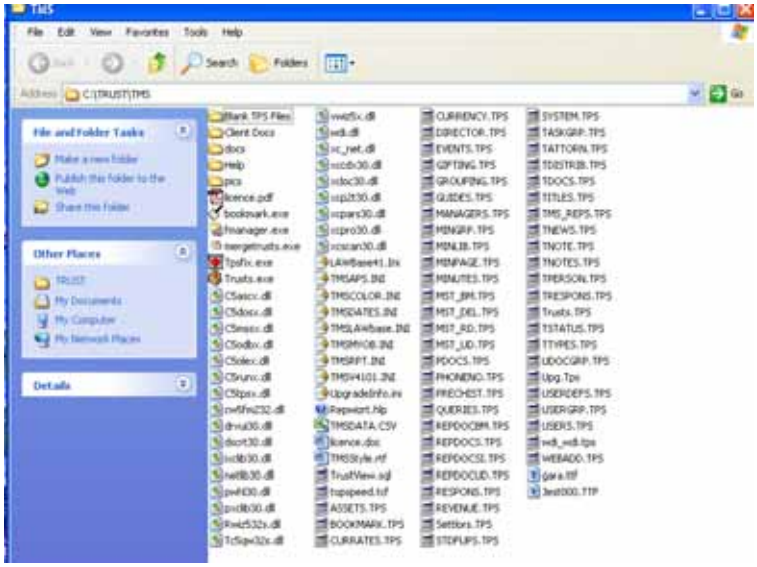
OVERVIEW

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, 4.3
- ⇨ 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