

SESSION 10.2

LEVEL 3

EMAIL

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

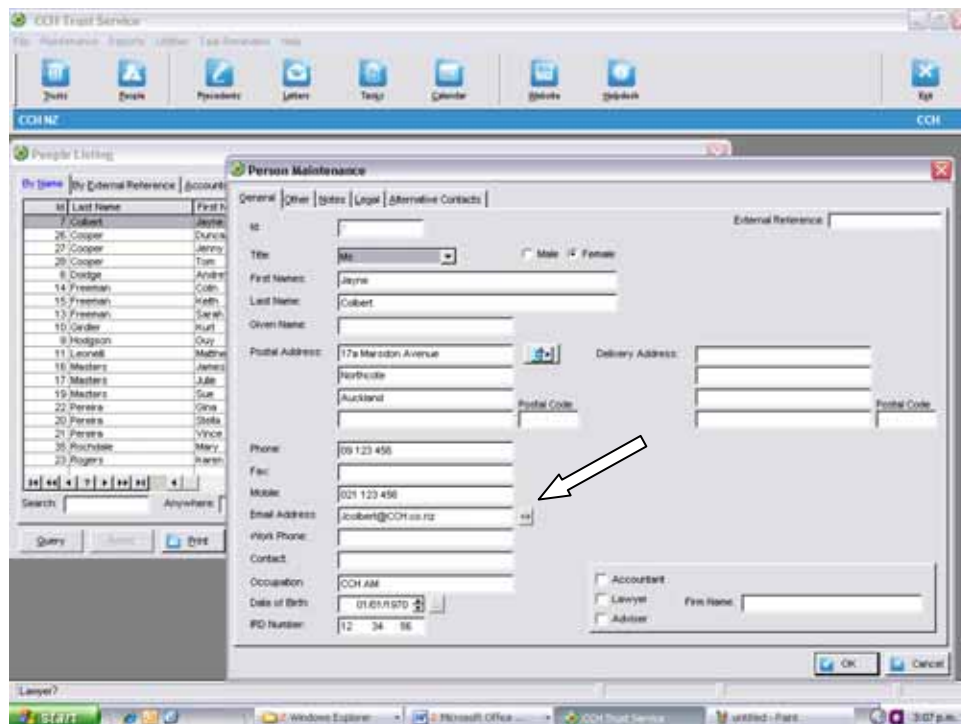
Preparation

Ensure you have collected and entered email information in your database
 Trust Service is compatible with Microsoft Outlook

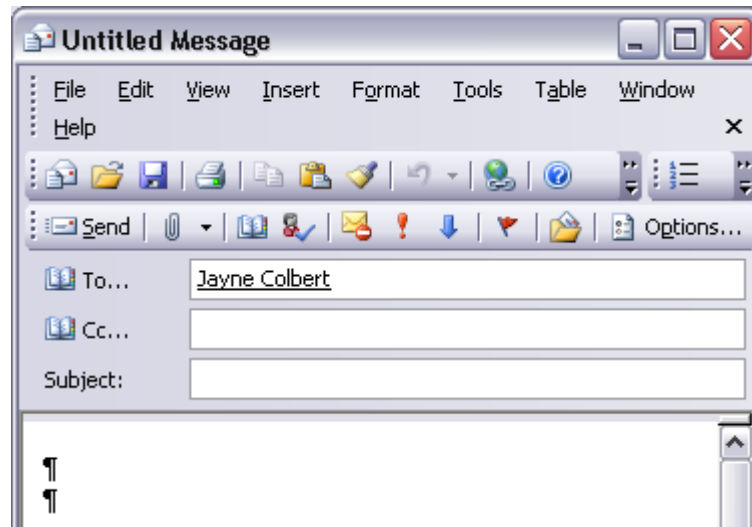
Email to an Individual

Open the Trust Service

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



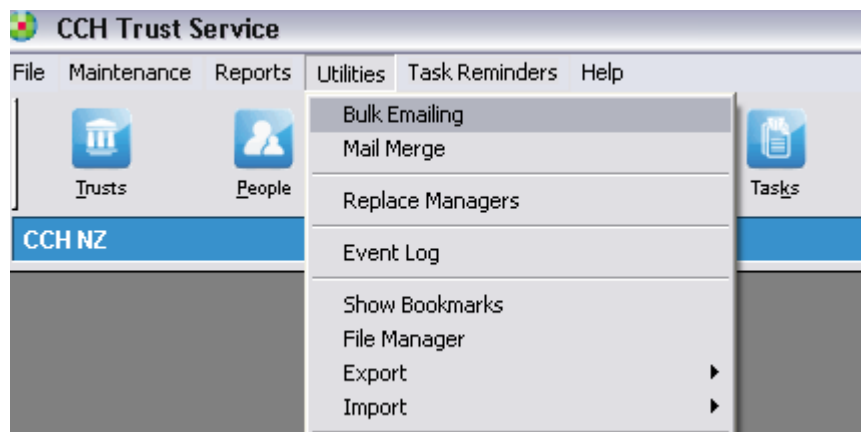
Select the icon next to the email address to open Outlook (if not already open). A blank email will be opened with the email address in the 'To' field



You can now type and send your email.

Email to Groups of People from the Database

Select Utilities, Select Bulk Email



The Bulk Email screen will display.



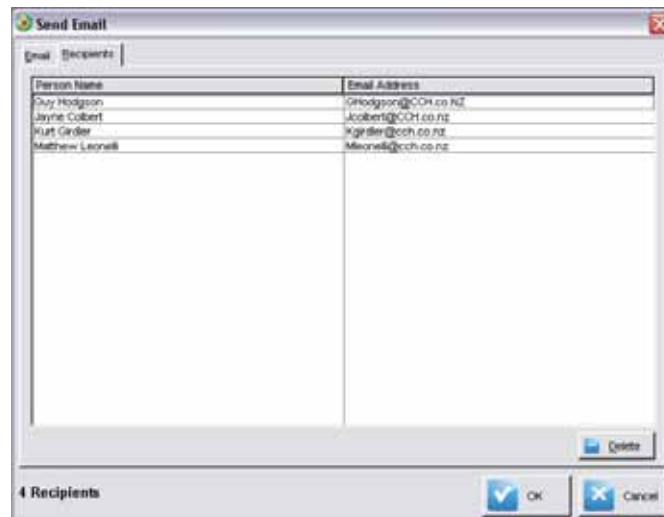
Select who should receive this email
 Use the Date of Birth Range to exclude minors (beneficiaries) if necessary
 Select Create Email

The Send Email box will display.



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

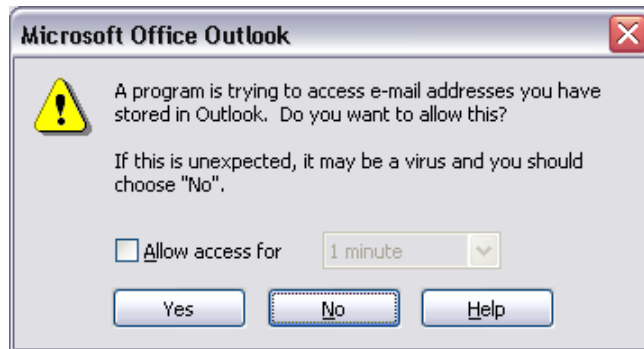
To control who you want the email to be sent to select the Recipient Tab at the top of the screen.



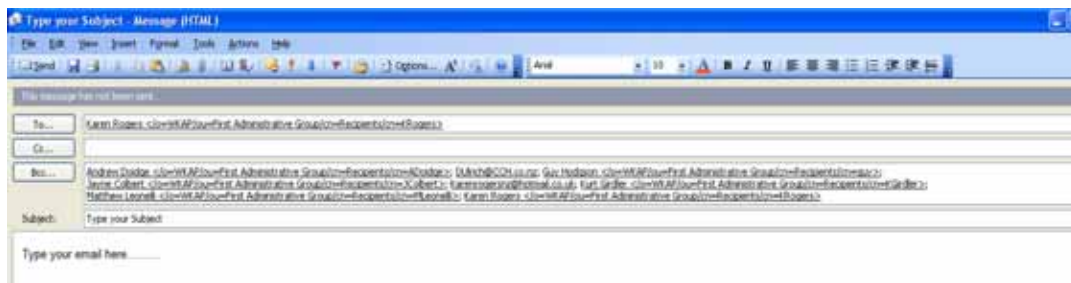
Select recipients by highlighting and deleting the people you do not want to receive the information.

Select OK to open Outlook and create email

You may get a warning message asking you to authorise the connection to Outlook. Click yes to authorise.



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.