TR4 - Manually triggered emails (training correspondence)



You can send emails to people on your candidates list from within the scheduled course. Templates are set up for the following correspondence:

- Joining Instructions
- Course Cancellation
- Thank-you and Survey Link

These templates are stored locally for each training provider, so you are able to edit these if you need to change the wording.

Within your candidates list it is likely that you will have people with different statuses. In order to ensure you only send emails to the correct people, you will need to perform a query to filter this list before sending the manually triggered emails.

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Navidale lo: Perso	Junei > Training	> Maintenance	> scheduled courses.

- **1.** Search for the course, and double click to open up the scheduled course you want to send an email for.
- 2. Go to the Select Detail box, and select Candidates.

Course Detail	
Providers	
Candidates 💦 🔪	240
Course Assessment	
Candidate Assessment	

3. Click on **I** or press **F7** to switch to query mode.

4. Select the appropriate Training Status for the people you want to send an email.



Note: For example, if you are sending joining instructions or a course cancellation email, you will want to query by candidates who are 'Scheduled'; and for the Thank-you emails you will want to query by 'Successfully Completed'.

- **5.** Click on so press **F8** to execute the query.
- **6.** Only the people with the selected status queried will be listed
- 7. Click on Notify Candidates

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8. In the *Generate Letter Module* screen, select the **Letter Type** you wish to use, click on **All Query Records**, tick the **Send Email** box and then click on

elect Lette	er Type	
etter Group	TRAINING	
etter Type.	EMAIL - JOINING INSTR	UCTIONS
Selection	C Current Record	All Query Records
Send Email		
	ок	Cancel

- **9.** The *Send E-mail* screen is displayed. Enter your provider email address in the **From** field and click on Apply to All, this copies the email address to all emails.
- **10.** If applicable, click on **Attachments** to select attachments you wish to send with the email.
- **11.** When they have been selected, click on Apply to All

From	tservices.learning@it.ox.ac.uk Apply to All					
ſo	tharris@cx.ac.uk					
Attach	Joining Instructions Example.docx; Attachments Acolv to All					
Subject	Training event - Joining Instructions					
	Dear Dr Harris,					
	We are pleased to confirm your place on the Ms Office Access introduction course event, which takes place on 12-MAR- 2013 at (start time field when available).					
	Please aim to arrive at least fifteen minutes before the event is due to begin.					
	VENUE					
	The venue for the event is the Charlbury Training Room (It Services). Please let us know if you have any access requirements of which we should be aware.					
	INDIVIDUAL NEEDS					
	Please let us know of any individual needs you might have in relation to this event; we will make every effort to meet these.					
	REFRESHMENTS					
	Refreshments will be provided. If you have any dietary requirements of which we should be aware please let me know.					
	IF YOU ARE UNABLE TO ATTEND					
	Please let us know as soon as possible if you are unable to attend this event. The structure and dynamics of the event will be disrupted by non-attendance on the day, and if we know in advance that you are not coming we may be able to offer your place to another person.					
	<< Previous Next>> Check To Send E-mail 🗸					

12. Click on Check To Send E-mail C. to scroll through the candidate's emails, so you can perform a visual check of each email (for example, to check that the from, to and attachments are all correct for each person).



Note: If you do not want to send an email to a person in the list, you can deselect.

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13. Click on

14. A message will appear telling you the number of emails successfully sent.

Send All





Note: If there is no 'To' email address for any person, you will receive a message similar to the one shown. Click **OK** to return to the emails that were not successfully sent, where you are able to enter an email address.





Note: Any bounced email addresses will be sent to the email address that you entered in the *From* field.

15. Go to Select Detail box, and select Course Detail.



16. Add a note in the **Comments** field noting what emails have been sent and when.

17. Save the information: either click \blacksquare or press **F10** button.