# TR4 - Manually triggered emails (training correspondence)

**HRIS** SUPPORT CENTRE

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.

## Navigate to: Personnel > 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
Course Assessment
Candidate Assessment
```

**3.** Click on [icon] 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'.
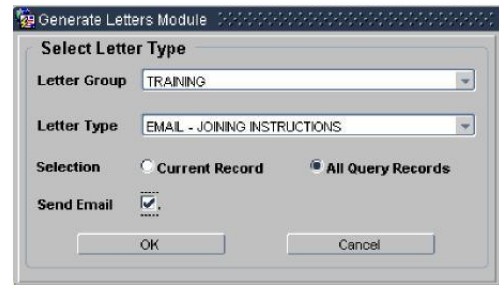
**5.** Click on [icon] or press **F8** to execute the query.

**6.** Only the people with the selected status queried will be listed
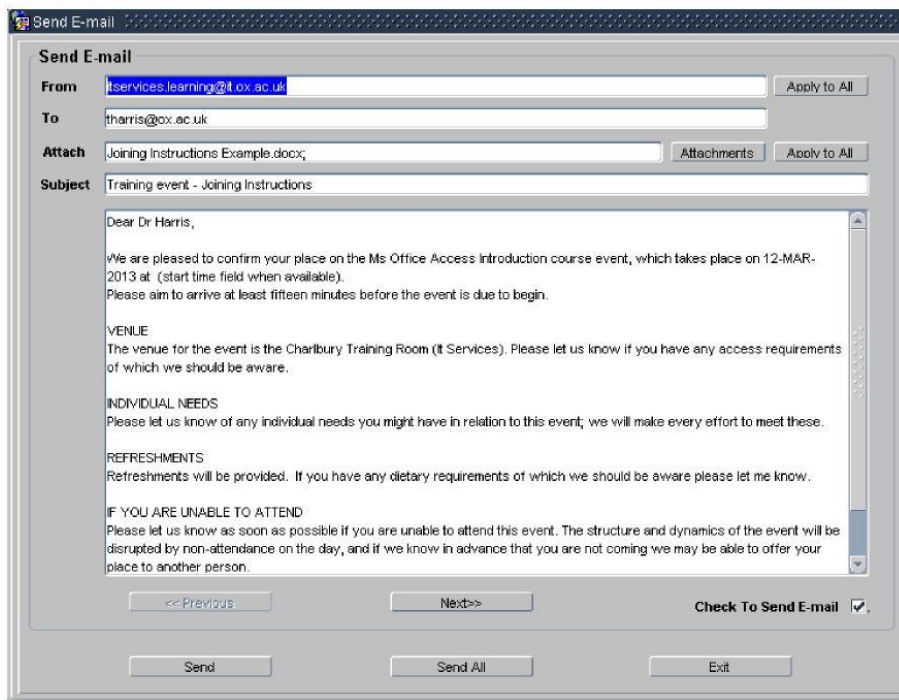
**7.** Click on [Notify Candidates].

**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
OK .

**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 .

**12.** Click on Check To Send E-mail ✓ 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.

**13.** Click on [Send All]

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



> 
> **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  or press **F10** button**.**