Electronic Documents may be forwarded to anyone you may wish to send them to as part of your business needs by using the Send to Mail Recipient option. You may use this option to use directly with Outlook (set as the default settings in Global settings) or the TRIM Context Email form.

If sending to other TRIM users, send the Trim Reference (TR5) rather than the electronic document as it cuts down the traffic on the network, and reduces the amount of duplication.

You will need to have your TRIM Email option set to using the TRIM Context Email form.

1. Tools > Options > Email Tab.
2. Tick the ‘Send Records using TRIM Context Email form’ box.
3. Select OK.
How to Send a Record to an E-Mail address using TRIM Context Email form

1. Perform a search and display the record(s) on your screen. If more than one document is required to be sent, tag the items you wish to send.

2. Once selected, Right-click > Send to > Mail Recipient.

3. Complete the fields on the Message Tab.
   - **Select from TRIM locations** or **Select from Mail Address Book** - This option is used for determining the destination of the email message. Click KwikSelect to determine how you will get the email address, either from TRIM Context or addresses in the e-mail application. TRIM Context also allows you to type in a valid email address if it is not already in the Mail Address Book.
   - **Add To / Remove To** - When you have an email address highlighted, click Add 'To' to copy the address to the Recipient field. You can put as many email addresses in the Recipient field as you wish.
   - **Add CC / Remove CC** - When you have an email address highlighted, click Add 'To' to copy the address to the cc (copy) field. You can put as many email addresses in the cc field as you wish.
Subject - The Subject field is the standard field used in email applications. It is advisable to reduce the size of this field by taking out the Record Type, for example INTERNAL DOCUMENT. For Tagged Items it will default the subject field to TRIM Records, this can be altered to reflect the subject matter of the document/s.

If you wish, you may put further information in the large text area beneath the Subject field, e.g. why you are sending them the document/s. This ends up in the body of the e-mail message.

4. Complete the fields on the Attachments tab.

Select:

- TRIM Record Reference – For documents forwarded to other TRIM users, this sends a tr5 file which launches TRIM with the selected document. Cuts down network traffic and duplication.

- Internet URL – sends a Context ice or WebDrawer URL for email recipients to view a document through a Web browser (not recommended as only public access documents available through this option).

- Electronic Document - for documents forwarded to internal and external locations that do not have access to TRIM. This sends a copy of the document in its native format, e.g. PDF, .TIF, .DOC etc. Recipients will need to have the associated software to view these documents, e.g. TIF/TIFF = Microsoft Office Document Imaging File.

- Electronic Renditions –This option is only available if a rendition exists. Sends copies of any renditions that may be linked with the selected document/s.

5. Complete the fields on the Metadata tab if you need to modify.

6. Once you have finished setting up the details for the record to be sent by email, click OK to send the email.

7. The Send Mail event is recorded in the activity log, communications or can be viewed in your Outlook sent box. The activity log can be accessed from the window menu.

Note: With the exception of the Subject field text section, do not hit the enter button, if you have not finished completing the form. If you do it will send the email if you have selected a recipient.

Note: The Customisation in the Global Settings is set to use the Mail Recipient functionality direct with Outlook.