

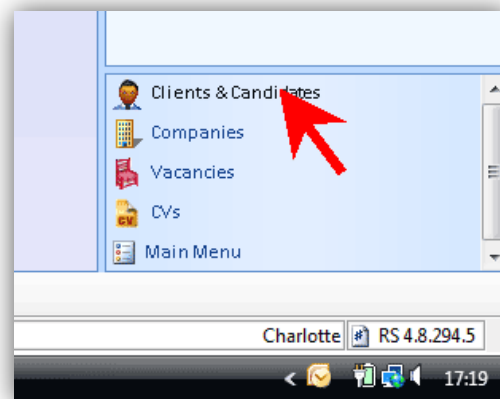
How do I send an email?

There are several different ways of initiating the Emailer:

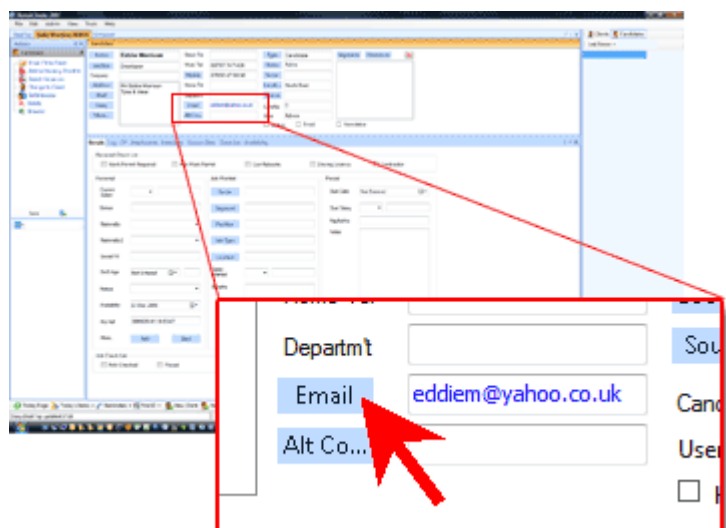
- *From a client or candidate record*
- *From Search & Mailings*
- *From the mini records such as in My Clients or Sales Calls*
- *From a vacancy or candidate record*
- *From the look up panel on the Main Menu*

The simplest way of sending an email to one individual is from the client or candidate record.

1. Open the client or candidate record – you could use the look up function on the 'Clients & Candidates' button to do this.



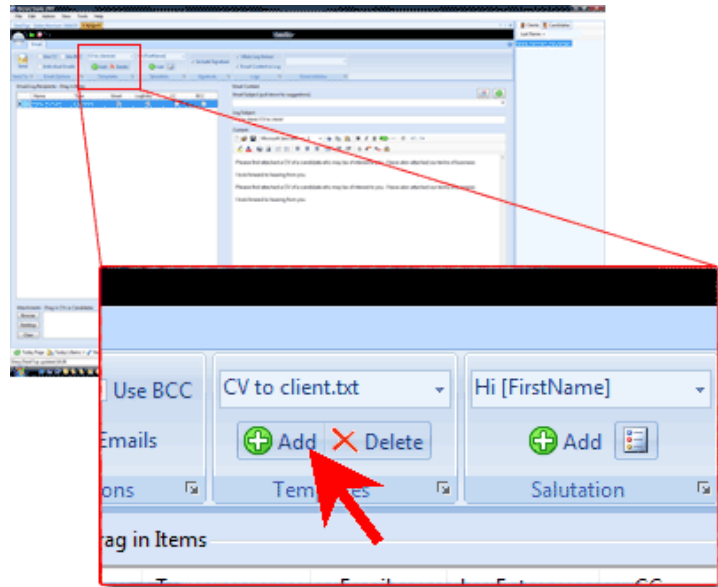
2. When the record is open click the blue 'Email' button.



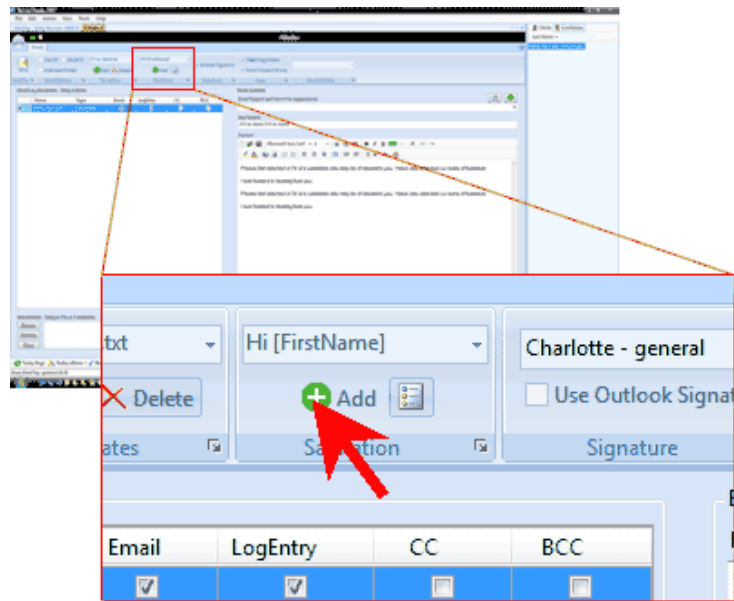
3. The Emailer will open in a new tab. The email address will automatically appear in the recipients list.
4. Use the ribbon toolbar to set up the email.

If you just want to email one person you don't need to set 'CC', 'BCC' or 'Individual Emails' because these are just used when you want to email more than one person.

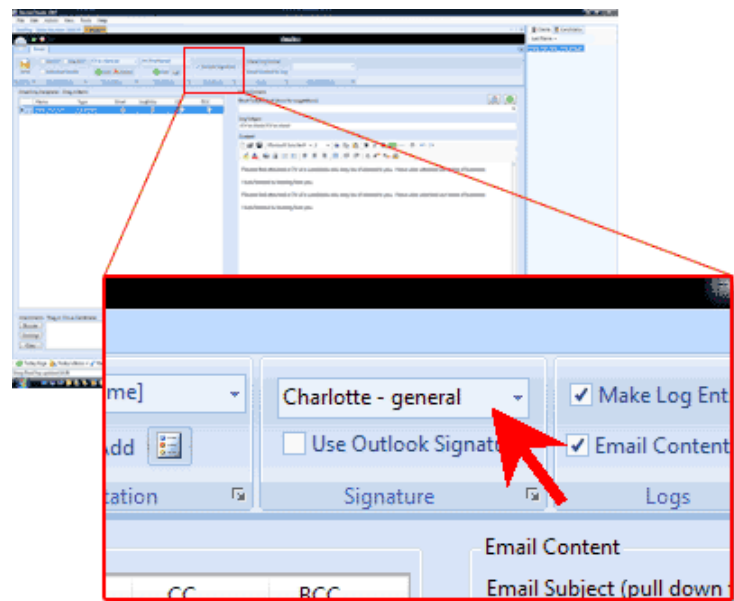
5. Do you want to use a template? If so, choose a template from the list and click 'Add'.



6. Recruit Studio can add a salutation to the email. If you want it to do this, choose one from the list and click the 'Add' button.

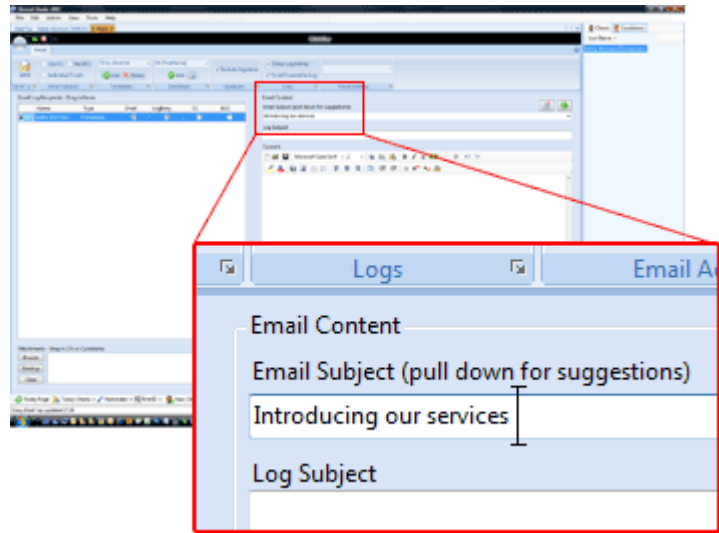


7. Do you want to include your email signature? It will be added automatically if you have a default signature set up in Recruit Studio, alternatively if you tick 'Use Outlook signature' the signature will be added by your email client.

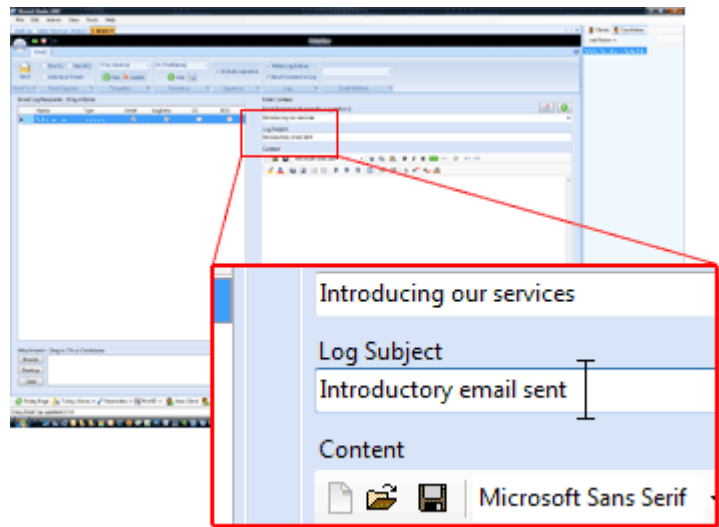


8. Do you want to add a log note to the recipient's log? By default, this will happen. You can also choose to store the text of the email in the log. This is turned on by default.

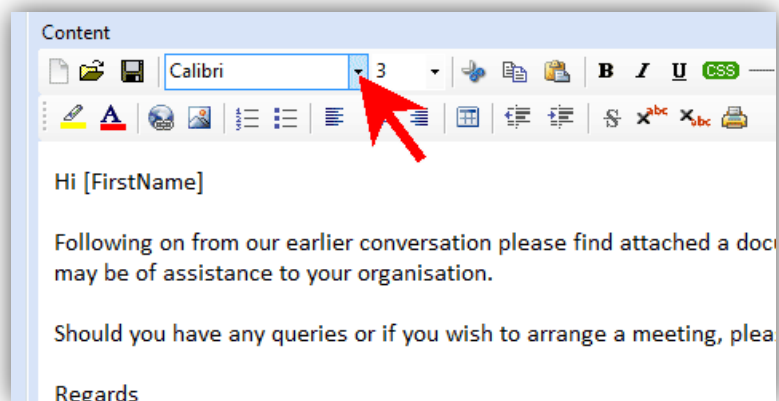
9. Enter the email subject.



10. Enter the log subject (this will appear on the contact's record not the email).



11. Now enter the text for the email body if you have not already used a template. Use the html functions to adjust the fonts and insert pictures.



12. When you are finished composing the email, click 'Send' on the ribbon.

If you use Microsoft Outlook, the email will open in Outlook for you to preview. You need to click 'Send'.

If you use Lotus Notes, the email will be sent straight away. You will see it in your 'Sent Items' folder.

When you close the Emler tab, the log will be applied to the recipient.