How do I email a CV to a client (without a vacancy)?

There are several methods you could use to email a CV to a client. If you do not yet have a vacancy but wish to email a CV prospectively to one or more clients, use the method detailed below.

 Open the candidate record and go to the 'Attachments' tab.

You could use the Look Up panel on the main menu to find the candidate record.

Remember that Recruit Studio can only email a public CV so make sure you have one prepared before you start. The public CV is circled.

 On the Actions panel (left hand side of the record), click 'Email CV to client'.





3. The Emailer will open. The CV will be listed in the Attachments panel (bottom left of the screen) and the candidate will be listed under the Recipients list.

> The candidate will not receive an email – the candidate is listed here because he/she will receive a log entry on their record.

 Use the 'Clients & Candidates' panel to look up the name of the client you want to send the CV to.





5. When you have found the client, drag their name over to the Recipients list on the Emailer screen...

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6. ...And they will be added as a Recipient.

The client will show a red dot next to the name because the email has not yet been sent. This will turn green later.

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 Now enter the email subject line, log subject and content.
 You may like to use an email template for the content, if you have one.

Use the ribbon toolbar to compose your email.



 When you are ready to send the email, click 'Send' and the email will be generated and sent through your email client program.

> Note that if you use Microsoft Outlook, the email will open in a new window and you will need to click 'Send' on the actual email. If you use Lotus Notes, the email will be immediately sent without previewing it first.



See also:

• Getting started with Emailing for basic tips on creating emails