How do I … formally email a CV to a Client (from the Client list)

This video will discuss just one of the approaches available when you want to email a CV and it's worth knowing how to do them all.

First of all, open up the Candidate record and check that the candidate has a public CV in their attachments panel.

If you haven't yet created a formatted version of a CV and made it public, you should watch the tutorial on this topic first so that Recruit Studio knows which CV to send when you come to send the email.

In this candidate's case, we can see that he has a formatted CV ready to be sent out so let's now click on the Client List tab to associate this candidate with a vacancy.

If you haven't already done so, now is the time to shortlist the candidate for a particular vacancy. You do this by dragging a vacancy into the Client List tab and this will make the association. To see this in more detail, watch the video 'How do I… put a candidate forward for a vacancy?'

Now that we've dragged the client or vacancy into the candidate record, more options are enabled and you can now click the Email CV button, which will show you the CV that is going to be sent. Click the file name to confirm this and then the Emailer will open.

You can see that the Emailer has been populated with the name of the candidate – who is only going to have their log updated not receive a CV – and the client who is going to be sent an email as well as receive an update on his log. You can see that the CV has been identified in readiness and all you need to do now is work through the Emailer ribbon to set the options you want and create the email.

When you are happy, click Send to review the email in Outlook or Lotus Notes and finally send it.

When you return to Recruit Studio, and close the Emailer, the candidate's log has been updated along with the vacancy's log and the Client's log. Also, the candidate's client list form will be updated to show that the CV has been sent, along with the date. If you now open the vacancy record, you can see this progression from the other direction.

Go to the Candidate's tab and you will see the candidate listed, along with a tick to confirm that the CV has been sent to the client.

When you get a positive response from the client regarding the CV, you might like to watch the tutorial on how to create an interview.