How do I … email a CV prospectively to a client?

This video helps you to send a candidate's CV to a client. You can do this when you have found the candidate through a CV search or through search & mailings.

We suggest you watch the video 'Getting started with Emailing' first so you are familiar with the email form.

If you have used CV Search to find CVs for a current vacancy, you firstly need to check whether the CVs that have appeared in the search results are already candidates in the database. If they are you can open up their record and continue with emailing their CV to a client. If they are not yet registered as a candidate, now is the time to do so. If you're not sure how to do this, we recommend that you watch the video 'How do I… create a candidate with a CV?'.

So now begin by opening the Candidate record.

You should check that the candidate also has a formatted CV attached to their record, because you probably don't want to email the candidate's original CV to a client. If you don't yet know how to do this, you should watch the video entitled, 'How do I… format a candidate's CV and make it public?'

You can tell whether a candidate has a formatted CV attached to their record by looking in the Attachments tab.

The public CV icon indicates that this is the CV that Recruit Studio will email out, so you know can continue.

In this tutorial, we are going to email the CV directly to a client without involving a vacancy. You would use this option if you want to prospectively send the CV to a client or if your business is candidate led and you want to tell this client about a great candidate.

To do this, all you need to do is click the Email CV to Client button on the actions panel.

This simply opens the email form and allows you to drag in a client from the clients' panel on the right.

You can see that the candidate has already been added to the recipients list – however if you look closely you will see that they are actually only added to the log entries box, they are not going to receive an email. And now the client has been added to the list. The tick under Email indicates that they are going to be sent a CV.

You can now add more clients if you wish, or if you are happy with the recipients list, you can move on to create the rest of the email.

Now create the email to your requirements.

If you look at the bottom of the screen, you can see that the Candidate's formatted CV has been attached. Recruit Studio has chosen the formatted CV because it was previously assigned as the public CV.

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

So now you can close the Emailer as we've finished with this. You can then open the client record and see that the log has been updated.

As mentioned previously, there are several ways of emailing the CV to a client – this method is just one which suits a particular situation. We recommend that watch the other videos regarding emailing of CVs so that you are familiar with the other approaches.