Getting started with Emailing

Recruit Studio interfaces with Microsoft Outlook or Lotus Notes to send emails, enabling you to send emails directly from Recruit Studio. The benefit of this is that you can do the whole task from start to finish within the package and it will keep a log of who, when and what you have emailed.

There are many approaches to emailing in Recruit Studio, each one with its own appropriate situation. You can:

- Send a simple email to a person – be it client or candidate.
- Email a CV prospectively to a client – this method does not involve a vacancy.
- Email a CV formally to a client – this takes place when you have put a candidate forward for a vacancy and is a more formal approach.
- Email a CV to multiple clients.
- Send an email mail shot for instance a marketing email

There is a video tutorial on each situation and the purpose of this video is to get you familiar with the email form so you can use it and change the various options.

For this tutorial, we are going to send a simple email to one person. This is the most basic way of using the Emailer and it is ideal for showing how it works.

Firstly open up a client record. You could choose to email a Candidate instead if you prefer.

To invoke the Emailer, click the blue email button.

The Emailer opens in its own window. It makes use of the ribbon which is an active toolbar at the top of the window and it's where you can change options.

Beneath the ribbon are the various panels showing the recipients list, the subject and content of the email and at the bottom, any attachments.

In the recipients panel you can see that the client has been added. You can add more people to the list by dragging clients or candidates from the quick search panel.

And drag the client's name into the recipients' panel. Taking a closer look at the recipients list, you can see that both clients are going to be sent the email because they both have a tick under the email column. They are also both going to receive a log entry in their records to record the fact that an email has been sent. If you want to exclude one of the names from receiving the email you can simply untick their name and likewise the same with the log entry.

So now that the recipients have been added, you can continue to set up the email by adjusting the settings on the ribbon.

If you are sending the CV to more than one client, you might like to choose 'Individual emails' so that each client will be sent a separate personalised email with identical content. This is considered a more professional approach to using CC or BCC but you can use these if you wish.

Now move along the ribbon to the next option – templates. If your business uses templates you may be able to choose a template from the list which is specifically written for emailing a CV to a client.

The next option allows you to select your salutation. If you have already selected a default, this will be displayed for you. Select your default by clicking the button.

Moving along, the next option lets you choose if you want to include your email signature at the bottom of the email.

The final option has tick boxes for making a log entry and whether you want to include the email text in the logs. The last section lets you verify the client's email address. Click the client's name and look at their email address.

So now move on to create your email using the settings above. We've already selected the email and log recipients, now create the email subject. You can choose an option from the pull down list. Let's choose 'CV of Sanjay Patel'.

The box underneath shows the subject for the log notes as it will appear in the candidate and client logs.

Now you can move down to the content. If you selected a template, the text will be displayed in the content box. If there is nothing here, you can write your own text.

If you now look at the bottom of the Emailer screen, you can see that your candidate's public CV has been attached – Recruit Studio automatically knows which CV to choose – usually your formatted version. If you want to add more files to this email, such as your terms of business, you can click the Browse button to locate files elsewhere on your PC. Or you can click the Desktop button – if you store your terms of business as a shortcut on your Recruit Studio desktop you can locate it really quickly.

We've now moved all the way through the Emailer and when you are satisfied, you can click the Send button which will then allow you to review the email in your email program and finally send the email.

So now that you know how to use the Emailer interface and are familiar with all the settings, you can go on to email clients and candidates in the various specific situations talked about at the start of this video.