How do I use the Microsoft Outlook add-in?

For anyone using Microsoft Outlook 2007 you may be interested in using our add-in that allows you to import new candidates, CVs and clients direct to your Recruit Studio database. You can also update existing candidate and client log records with the content of the incoming email. Unfortunately this tool does not work for earlier versions of Microsoft Outlook, or Lotus Notes.

You firstly need to download the add-in from our website – you will find the link on the Download menu. Follow the instructions to install it and when you reopen Outlook, it will be ready to use.

If you find that after installing, the add-in does not appear you may need to tell Outlook to trust it. You can see if Outlook has disabled it by going to the Trust Centre on the Tools menu. Go to the Add-ins section and see if RSOutlook2007 has been disabled. You can use the 'Manage' options at the bottom to enable it.

So when it is all installed and working, you double click on an email in your inbox or a subfolder to open it. You'll see that there is now a tab at the top of the email called 'Recruit Studio'. If you click on this, you will see all the functions of the add-in displayed at the top.

Firstly click the 'Find sender' button. This checks your Recruit Studio database to see if a person with the email address of the sender appears in your database. If they do, a new button will appear telling you their name, whether they are a candidate or client and their status. If the sender already has a record in your database you can do various things. You can add the text from the incoming email to their log – to do this you can nominate to either include all the text or you can highlight a portion of text and send that to the log using the 'Selected content to log' button.

You can also add any attachments to this person's record too. Simply click the 'Add to database' button and in the pop up window, tick the appropriate box for adding to the CV database in the case of CVs, or tick 'Attachments' if you want to add a non-CV file to the person's attachments tab. Click 'ok' and it will be added. When attaching CVs you should tick both boxes so that not only is the CV added to the CV database, but to ensure that the CV is attached to the candidate record also.

Now, if when you click the 'Find sender' box and the database does not contain this person's record you can use the add-in to create them as a new record – either a candidate or client. The two buttons – New Candidate and New Client become enabled. Simply select which one you want to create and fill in the details as much as you can on the pop up. You can use the 'Company' button to add the new record to an existing company which is very useful particularly for client records.

Once you click 'Ok' you will see a confirmation message that the new record has been created.

At this point you can use the other functions of the add-in for sending attachments to the new record, and sending the email content to the log as you've just seen me demonstrate.

You should find that this is a very quick way of updating Recruit Studio directly from Outlook and is an ideal tool for when you receive CVs from new candidates because it really speeds up the rate at which you can get CVs and new data into the database.