How to do a mail shot

Note: Consultants should have permission to Mail Merge set (Maintenence → Users)

1. Select the records you wish to send the mail shot to:
    1. Open the Company Selector if you are mailing Company People; in the Company Selector you must make sure the Person radio button is selected then make a selection of people before starting a Mail Merge.
    2. Open the Person Selector if you are emailing Candidates.

       If you are using a version prior to 2.2.9.9, all the records in the selection will be included not just those highlighted. To mail only selected contacts in versions prior to 2.2.9.9, highlight them and save as a stored selection. Retrieve the stored selection then continue.

2. Select the Mail Merge tab.
   The Combo box will show the Logged in User and the table will show the list of saved merge documents that belong to the User. If you need to use a document linked to another User or Department, select them from the Combo box.

3. Select the document to be used and click **open**.
   If you need to make a New Mail Merge document click **New**. A list of letter templates is offered on which to base the mail merge or you can start from a blank document.
   You will be asked to confirm who the signatory for the Mail Merge is.

4. Word is opened within IQX.
   Edit the fields and text as required.
   Standard fields such as Name, Address, Salutation, Users Name can be inserted through **File, Insert**. They will appear as the data for the first selected recipient. Use the video buttons to step through the letters to check them. The Number will show which letter you are on.

5. Send the mail merge.
    1. If E-mail or Fax is to be enabled (used if the recipient has an email or fax address), click on the button and complete the subject line. When you click print, those enabled will be sent by the method selected; those without an email or fax willbe printed on paper.
    2. If Contact Event is enabled a contact event will be recorded against each recipient with the letter text
    3. The letters can be sent all at the same time, one by one, or from the selected letter to the end so individual tailoring can be made.
    4. It is not necessary to save the merged document when you close the form unless it will be used again in the future.

6. Back at the Mail Merge Tab use the **Contact Event** button can be used to add a contact event to each person on the current selection (this method can also be used for other bulk communication, not just for mailmerges).
   The contact event does not save a copy of the merged letter against each person, but can say which template was used on which date.

7. **Link to Applicant**. It is possible to attach the CV of one candidate to multiple client recipients, as in sending out speculative CVs. Use the Link to Candidate button to select the relevant candidate.
   When enabling email for the send out of the mail merge, tick the CV(s) box to attach the candidate's CV to each letter.
   When Contact Events is used each will also be linked to the Candidate. Letter text is saved in the contact event letter text tab.

Back to Online Users Guide
Back to Contact Management

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