How to do a mail shot

Note: Consultants should have permission to Mail Merge set (Maintenance → 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 will be printed on paper. (From version 2.2.9.15 if Enable Email is used and there are records without email addresses, a line appears with radio buttons for print to Email for All, only with or without Address.)
    2. If Contact Event is enabled (depending on your settings then contact events can be set to be made automatically when doing a mailmerge or optionally or not at all) either by default or by using the CONTACT EVENT button to enable it, a contact event will be recorded against each recipient of the mail merge.
    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. If you have not automatically logged a contact event against the recipients of the mail merge, you will need to do this after it has gone. Note that this will not obey the options that you may have selected for highlighted or subscribed only and will log against each record in the selection. 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.



It has come to our attention that some problems have been experienced when the User tries to run a mail merge from within the candidate selector or client contact selector screens within IQX.

Whilst the mail merge is running, if the User attempts to send any emails within Microsoft Outlook, there is a great risk that the email(s) might be hijacked by Microsoft Outlook resulting in sending these emails to one or many of the recipient's addresses on the mail merge list.

The error is not simply limited to emails, as a User working in Microsoft Word with a document, can find it too has been hijacked by Microsoft Outlook when sending out an attachment to an email.

We urge all Users to follow this guide when performing large mail merges.

1) **When a mail merge is in progress, do not use Microsoft Outlook for anything else.**
2) **When attaching a document in Microsoft Word, close all instances of Microsoft Word and do not use until the mail merge has completed.**

See also How to create a Contact Event from Mail Merges
Back to Online Users Guide
Back to Contact Management

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