



How to do a mail shot

There are version differences - these are highlighted **NB version details**

Consultants need to have permission to Mail Merge set (Maintenance> Users).

1. Select the records you wish to send the mail shot to.

- Open the Contacts Selector if you are mailing Company People; in the Company Selector you must click the Company People radio button and make a selection of people before starting a Mail Merge.
- Open the Person Selector if you are mailing Candidates.

Highlight any contacts you want to filter. In the below example I have highlighted one that I do not want to include in the mailer.

Demo - Shift Secondary Temp Desk Temps

Keyname or Number

Selection

Current Candidates Only

Expand

Count

Update

Search

Stored Selections

Stored Searches

Reports

Mail Merge

Bulk CV Import

Name

State

Last Contact

Work Type

Alert

Address

Town

Postcode

Mr Guido Albecker

Cleared

01/04/2013

Secondar...

93 Abingdon Road

Bramhall

Stockport SK7 3EZ

Mr Stephen Brown

Cleared

01/04/2013

Secondar...

24 Wardman Crescent

Redcar

TS10 2DQ

Mr Soe Cheung

Cleared

01/04/2013

Secondar...

31 Lovell Road

Cambridge

CB4 2QN

Mr Ian Dingwall

Cleared

01/04/2013

Secondar...

157 Belvedere Parade

Bramley

Rotherham S66 3RR

Mr Colin Hardingham

Cleared

01/04/2013

Secondar...

6 Linburn Road

Sheffield

S8 0GS

Mr Khalid Hussain

Cleared

01/04/2013

Secondar...

23 Balliol Street

Crumpsall

Manchester M8 0WS

Miss Carol Ingram

Cleared

01/04/2013

Secondar...

54 Tunstall Avenue

Billingham

TS23 3SP

Mr Ian Maris

Cleared

01/04/2013

Secondar...

18 Bracken Park

Grimsby

DN33 3LT

Mrs Paula McMahon

Cleared

01/04/2013

Secondar...

73 Junction Road

Norton

Stockton On Te... TS20 1PU

Mr Dylan Morris

Cleared

01/04/2013

Secondar...

523 Albion, Martin Street

Sheffield

S6 3DU

Mrs Lea Morris

Cleared

01/04/2013

Secondar... NOT daily

1 Padegetts Close

Warboys

Huntingdon PE28 2SZ

Mrs Susan Munn

Cleared

01/04/2013

Secondar...

59 Cockpit Hill

Brompton

Northallerton DL6 2RQ

Mr Andrew Murray

Cleared

01/04/2013

Secondar...

19 Cattistock Close

Guisborough

TS14 7NL

Mr Patrick Nevin

Cleared

01/04/2013

Secondar...

Millstone Barn, Hirst Co...

Birley Carr

Sheffield S6 1EX

Mr Simon Newstead

Cleared

01/04/2013

Secondar...

41 Fulmer Road

Sheffield

S11 8UF

Mr Martin Newton

Cleared

01/04/2013

Secondar...

12 Troutbeck Close

Lincoln

LN2 4XD

Mrs Denise Nicholson

Cleared

01/04/2013

Secondar...

18 Moscow Road East

Edgerley

Stockport SK3 9QL

Mrs Susan Nicholson

Cleared

01/04/2013

Secondar...

33 The Stables

Wynyard Village

Billingham TS22 5QQ

Jane Scott

Cleared

01/04/2013

alert

House

Melrose TD6

Mr David Smith

Cleared

01/04/2013

Secondar...

22 Shirehills

Prestwich

Manchester M25 9QB

Mr Paul Still

Cleared

27/08/2013

Secondar...

2 The Grange

Shotton Colliery

Durham DH6 2JW

Mr Derek Tinker

Cleared

01/04/2013

Secondar...

8 Maple Drive

Workson

S81 0LR

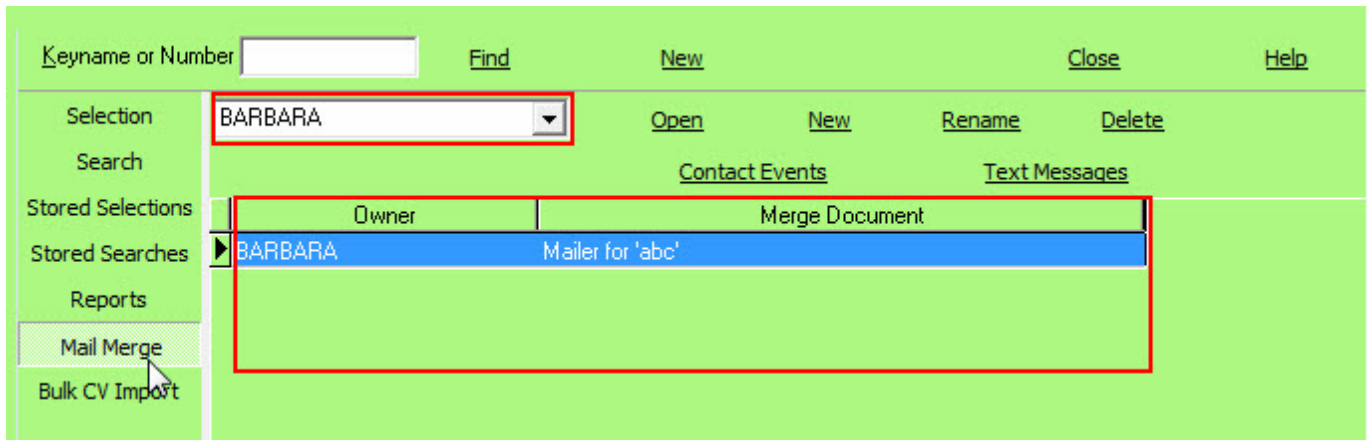
NB if you are using a version prior to 2.2.9.9 then you will then have to highlight and save the records that you want to send the mailer to into a stored selection, retrieve that stored selection and then continue. **For versions 2.2.9.9 and after** you can continue without saving the selection, just keeping those you wish to filter highlighted on the selector.

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 that 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:

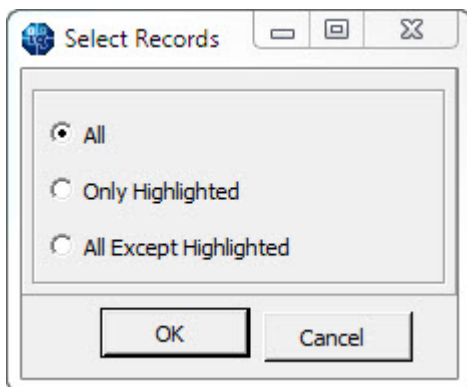
- Select existing document from the list in the table and click OPEN.

OR

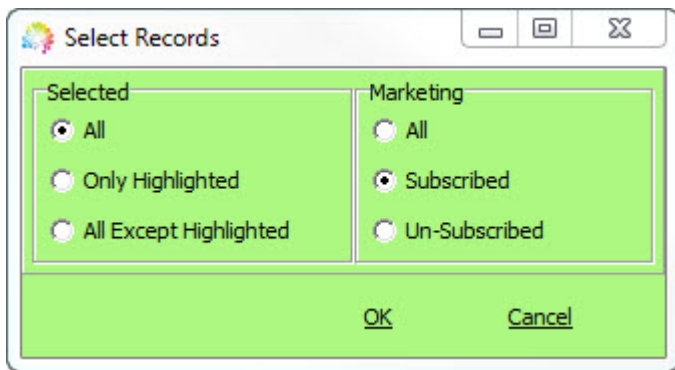
- To make a New Mail Merge document click NEW. A list of letter templates is offered on which to base the mail merge or you can start from a blank document.

You will be asked to confirm who the signatory for the Mail Merge.

4. **NB. If using version 2.2.9.9 or above:** if some records have been highlighted, you will then get a box asking you to select which records you wish to send the mail to – All, Only Highlighted or All Except Highlighted.



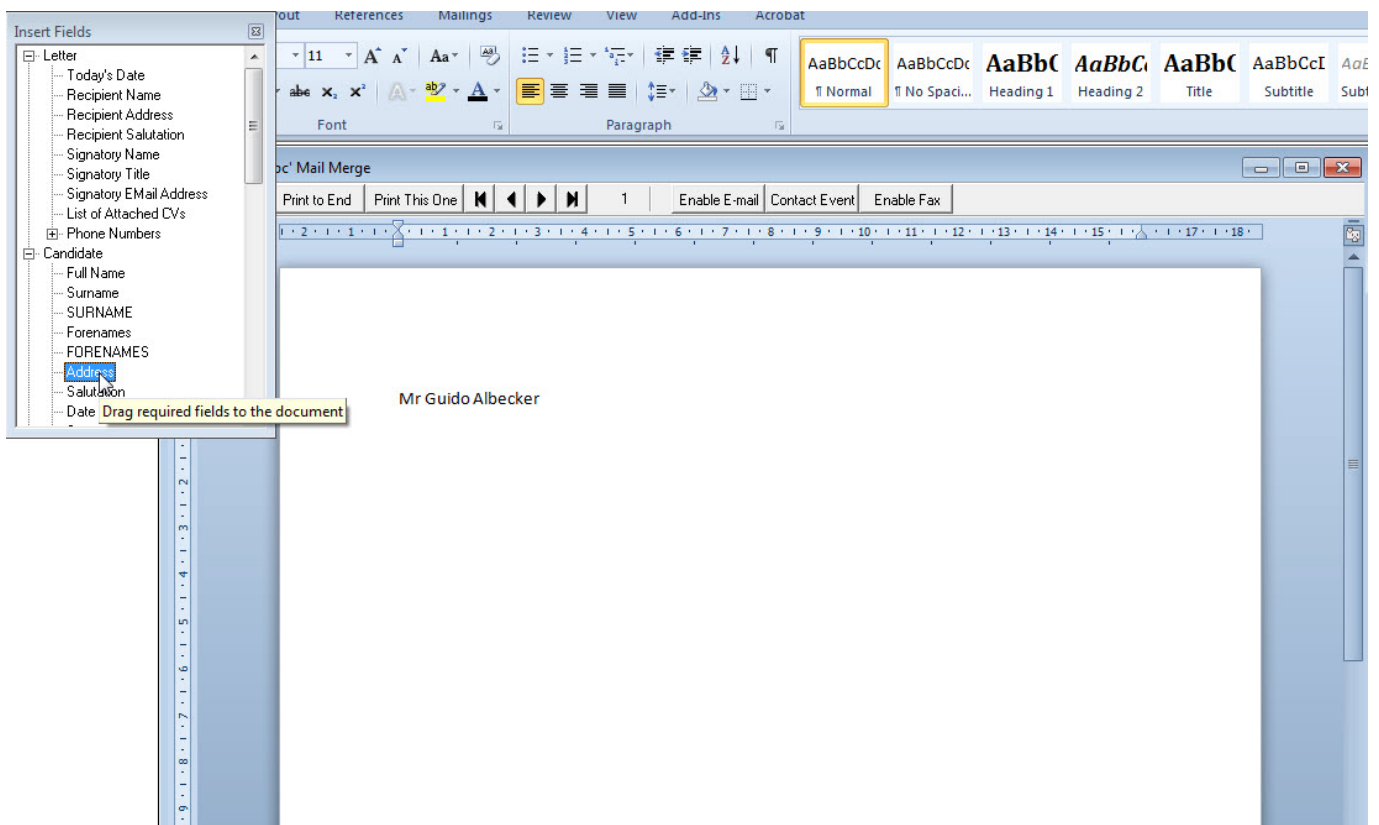
5. **NB. If using version 2.2.10.1 or above:** this box will also ask you to filter by marketing question – which records do you wish to send the mail to – contacts that are Subscribed to marketing, Unsubscribed to marketing or ALL.



6. The document is opened.

Edit the document as required.

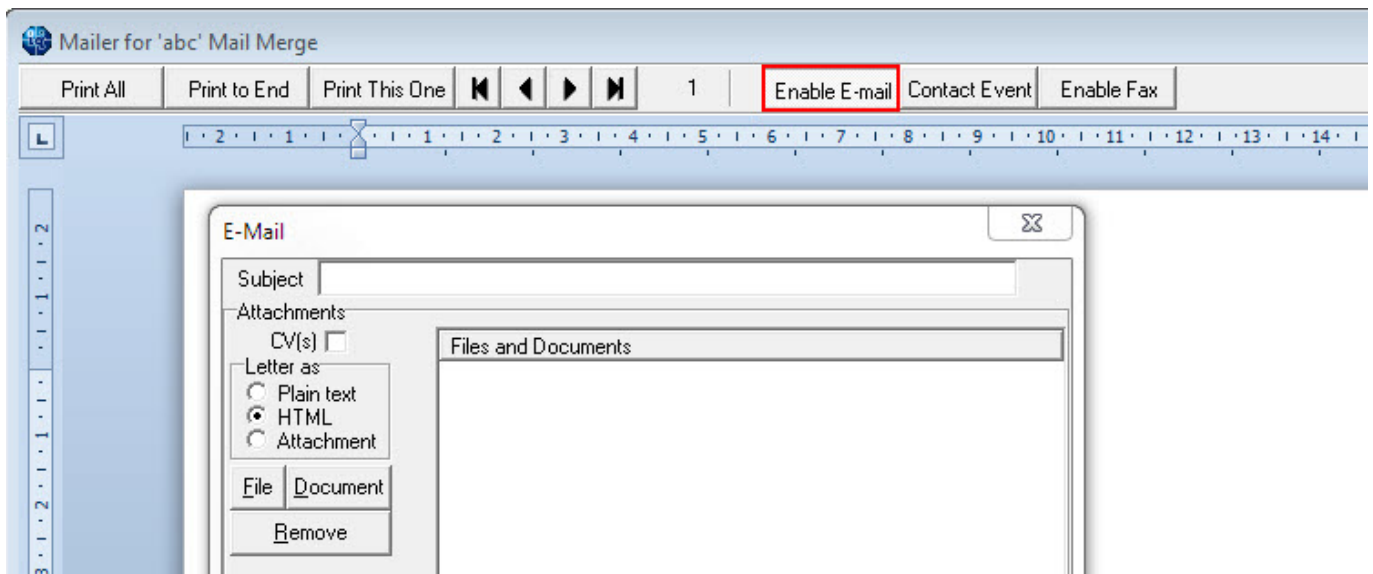
Further database fields can be inserted through File, Insert Fields. They must correspond to fields relevant to where the mail is being created (eg. progress fields will only be populated when the mail merge is created from the progress screen etc.). Inserted fields will appear as the data for the first selected recipient. Use the video buttons to step through the letters to check for each recipient. The number will show which letter you are on.



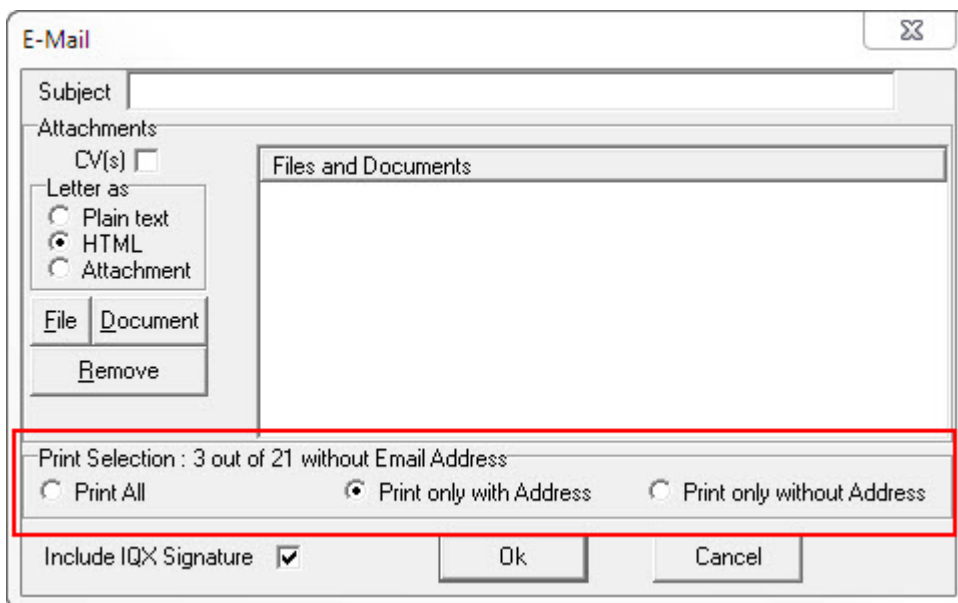
7. Send the mailer.

If you are just printing letters to send then you can skip a and b and go straight to c.

- a) To send by E-mail click on the Enable E-mail button and complete the subject line and other details in the box.



NB Versions up to 2.2.9.13 only: When you click print, those enabled will be sent by the method selected; those without an email or fax address will be printed on paper. When creating your selection it is worth to include 'has email address' in the search criteria. **NB Versions 2.2.9.13 onwards:** if there are any records without an email address it will show how many records do not have an email address and a radio button for options - merge for all, only with email address or only without email address. If ALL or without email address are selected then those without email address will be printed.



- b) Once you have completed the email details click ok.
- c) The letters can now be sent by the selected method using the PRINT buttons - this will then send by email or fax if you have enabled them or straight to printer if you have not. The options are
 - PRINT ALL - will send all letters.
 - PRINT THIS ONE button - means you can send just one at a time and allow you to make further individual tailoring to the letters.
 - PRINT TO END - will print from the current one you are viewing to the last one.
- d) It is not necessary to save the merged document when you close the form unless it will be



used again in the future.

8. Contact events.

There are three options for whether contact events are made when doing a mail merge to contacts. This is set up by your agency according to requirements. See [How to create a contact event from a Mail Merge](#).

9. 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 candidate.

When enabling the send out of the mailmerge by email 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.

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](#)

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