



How to do a mail shot / mail merge

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

Find

New

Close

Help

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	Worsop	S81 0LR

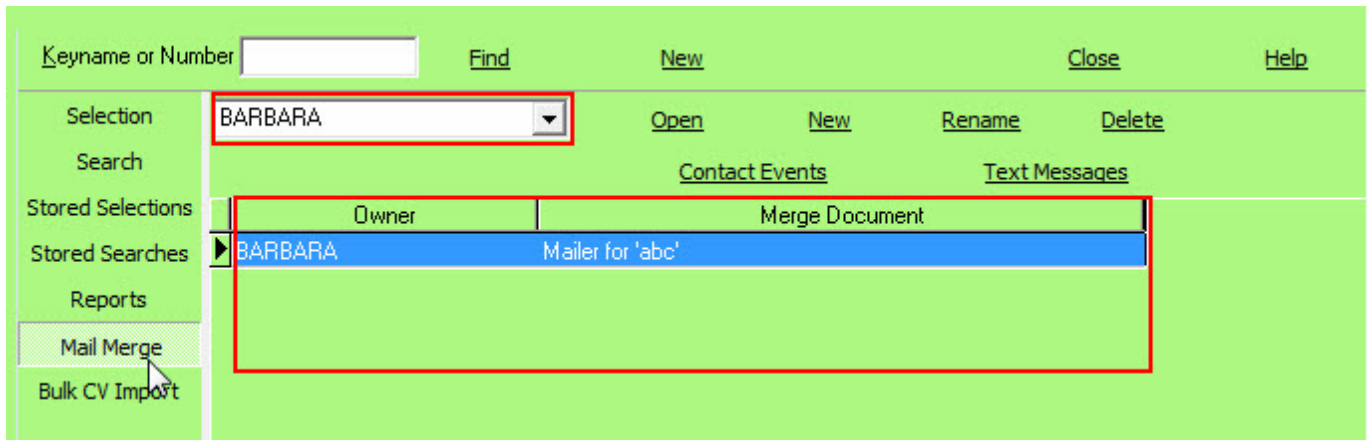
NB if you are using a version prior to 2.2.9.9 then you will then have to highlight and save the records that you want to send the mailer to into a stored selection, retrieve that stored selection and then continue. **For versions 2.2.9.9 and after** you can continue without saving the selection, just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

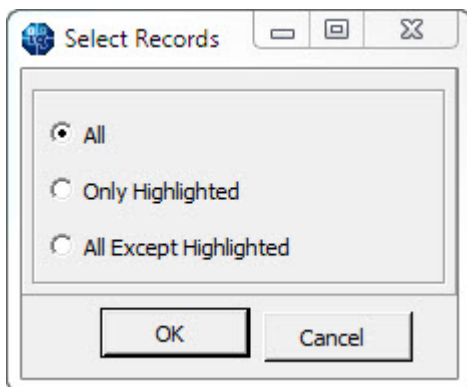
- Select existing document from the list in the table and click OPEN.

OR

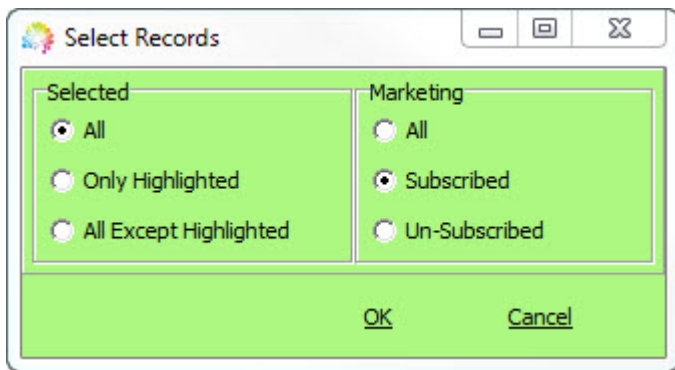
- To make a New Mail Merge document click NEW. A list of letter templates is offered on which to base the mail merge or you can start from a blank document.

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

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.



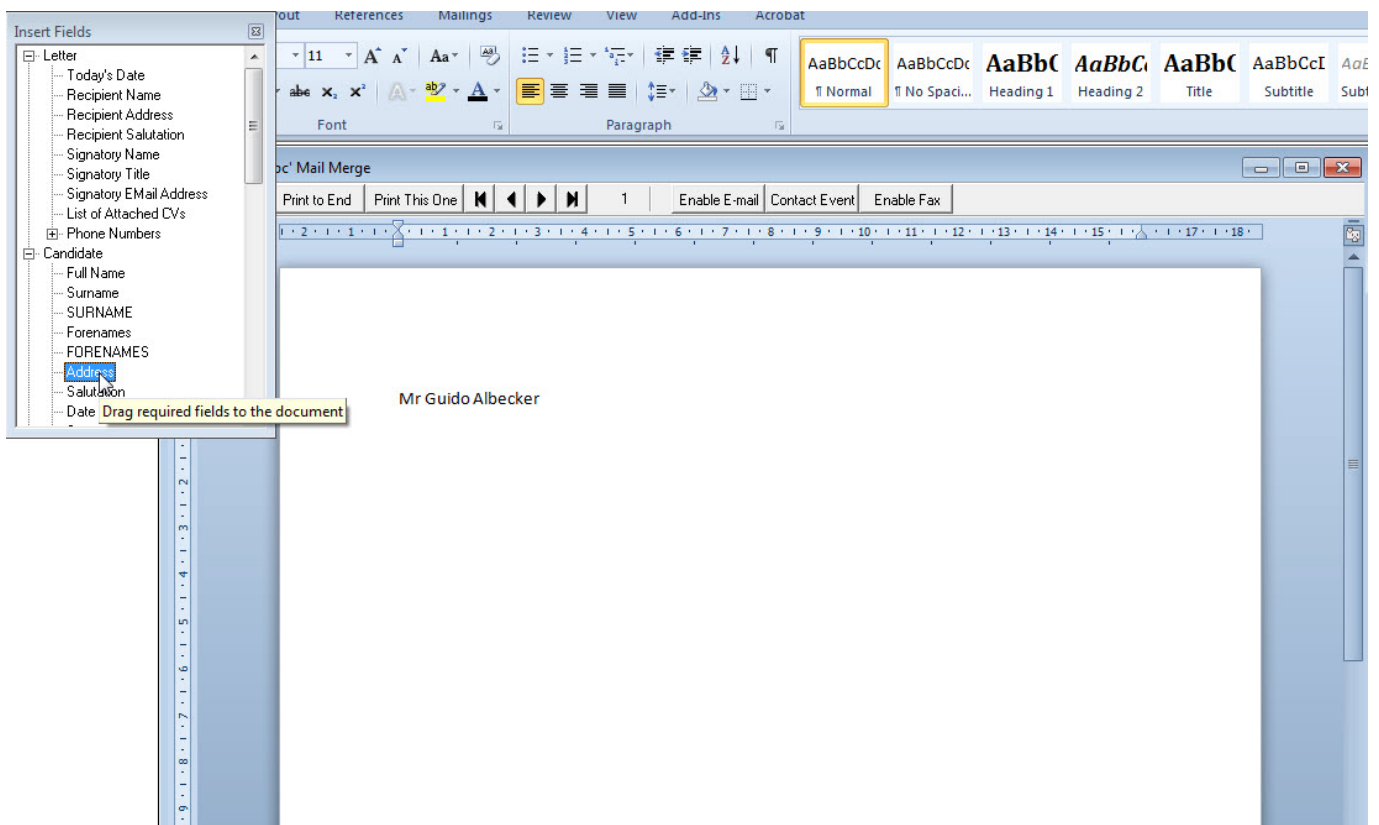
5. **NB. If using version 2.2.10.1 or above:** this box will also ask you to filter by marketing question – which records do you wish to send the mail to – contacts that are Subscribed to marketing, Unsubscribed to marketing or ALL. See [Unsubscribing a contact from marketing](#)



6. The document is opened.

Edit the document as required.

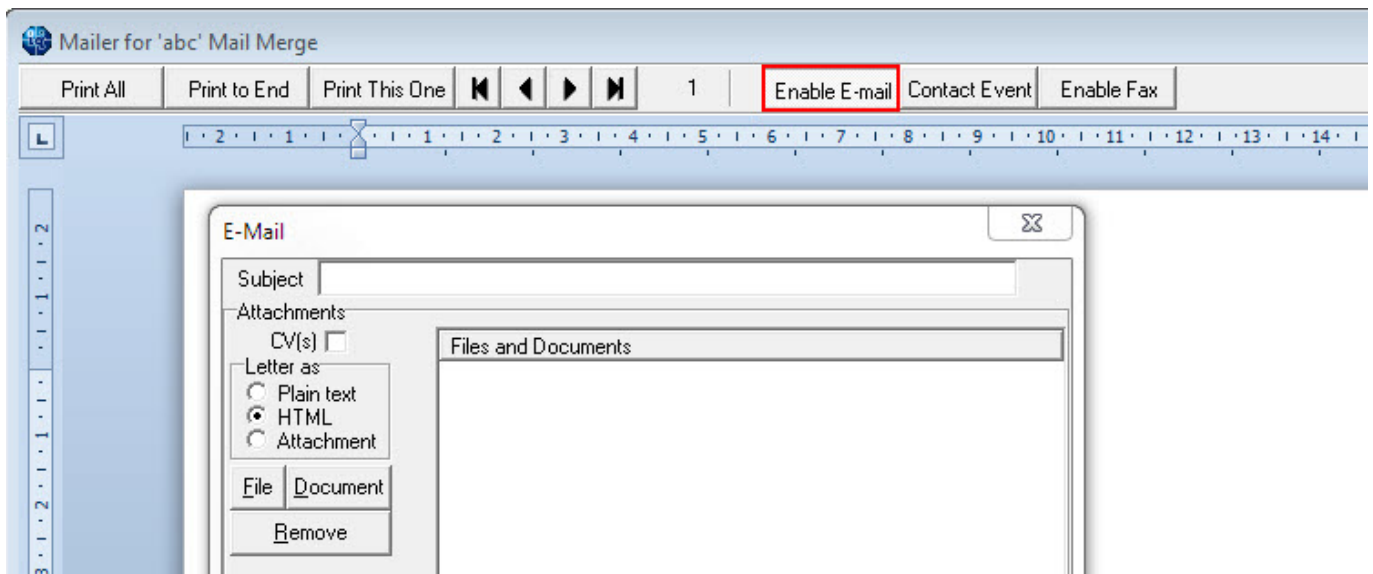
Further database fields can be inserted through File, Insert Fields. They must correspond to fields relevant to where the mail is being created (eg. progress fields will only be populated when the mail merge is created from the progress screen etc.). Inserted fields will appear as the data for the first 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.



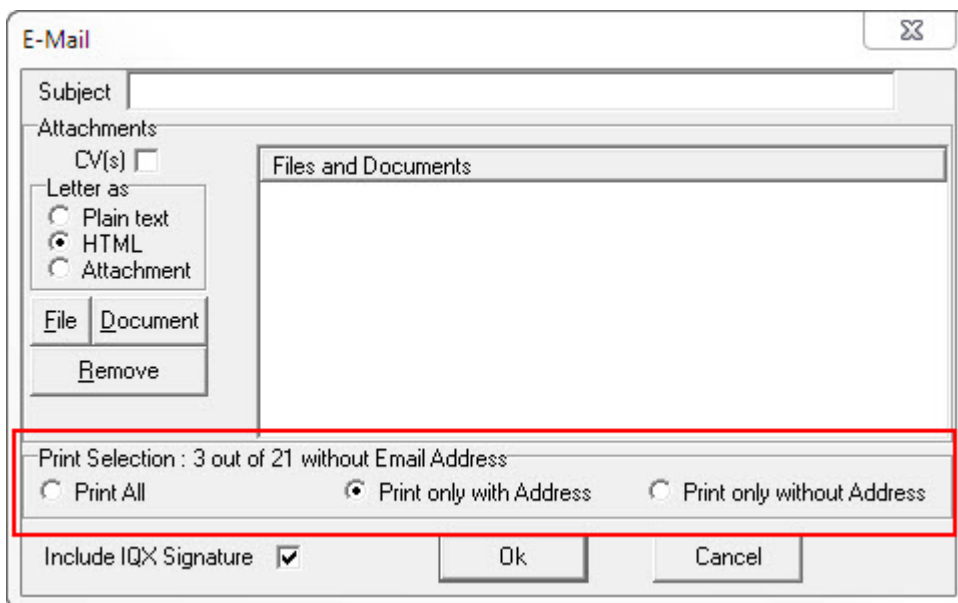
7. Send the mailer.

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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