intelligence Bulk Emails

Send out bulk emails or mail merges to candidates or company contacts and from any Shortlist or Search result.

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OR

Search	Vacancies	Shortlist

3I Group PLC Financial Manager

Tag ☐ Cn Int CV Inv Off Acc

TOM BENT	☑ ☐ ☐ ☐ ☐ ☐ ☐
Raymond James	☑ ☐ ☐ ☐ ☐ ☐ ☐
Pamela Kelly	☑ ☐ ☐ ☐ ☐ ☐ ☐
Peter Powell	☑ ☐ ☐ ☐ ☐ ☐ ☐
Martha Price	☐ ☐ ☐ ☐ ☐ ☐ ☐
Virginia Ramirez	☐ ☐ ☐ ☐ ☐ ☐ ☐
Amanda Ross	☐ ☐ ☐ ☐ ☐ ☐ ☐
Joshua Sanders	☐ ☐ ☐ ☐ ☐ ☐ ☐
Kathleen Watson	☐ ☐ ☐ ☐ ☐ ☐ ☐
Debra Wood	☑ ☐ ☑ ☑ ☑ ☑ ☑

Tag/Untag all records
Filter Results
Sequence Shortlist by Keyword
Mail-Merge to tagged Candidates
Remove Raymond James from Shortlist

Shane 22 Jan 20

Search	Vacancies	Shortlist

No Vacancy is currently Selected

back to Basic Search	Search Criteria

New Search — Tag All ☐

Adrian Rodriguez	+ ☐
Amy Barkhuizen	+ ☐
Bernadette Sulsters	+ ☐
Kari Penttila	+ ☐
Livhuwani Innocent	+ ☐
Nina Marie Esterman	+ ☐

Shortlist

Email/SMS Shortlist ✕

	Email Address	Mobile Number	
Livhuwani Innocent	maragainno@gmail.com	+2776	☑
Nina Marie Esterman	neena_marie@hotmail.com	+27788021228	☑
Adrian Rodriguez	aarn1990@gmail.com		☑
Kari Penttila	kari.penttila@sci.fi		☑
Bernadette Sulsters	bs1234567@gmail.com	+27841234567	☑
Amy Barkhuizen	amzbarky@gmail.com	+270607176209	☑

There are 3 options to send out bulk communications:
a. BCC email
b. Bulk SMS
c. Mail Merge

Mail Merge	Bulk SMS	BCC Mail

Using HTML template	Using MS Word wizard

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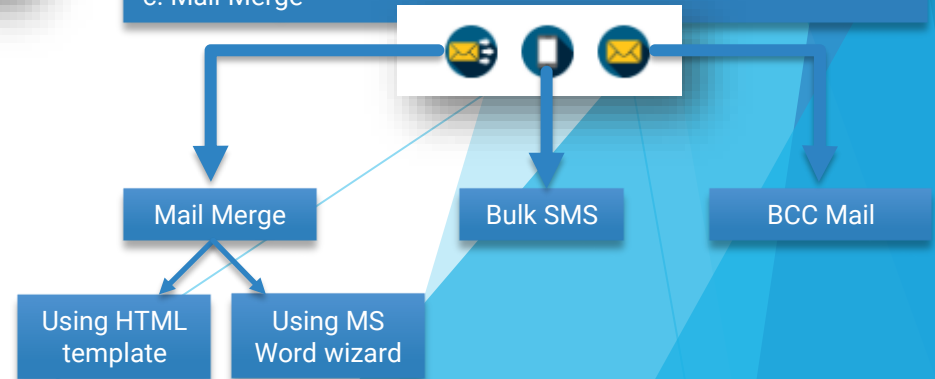
BCC Bulk Email

1. The BCC Bulk Mail creates a single email in Outlook with the tagged Candidates' email addresses in the BCC (blind copy) field. You can't personalise this mailer, but you can attach a document to the email for send-out.

2. You'll be prompted to enter the SUBJECT of the email message.

3. A blank email message with the email addressed in the BCC field will open. You can now add your message and email signature and any attachments you want to send.

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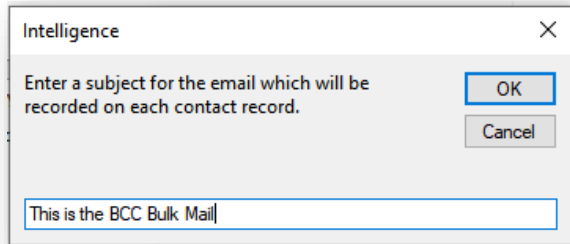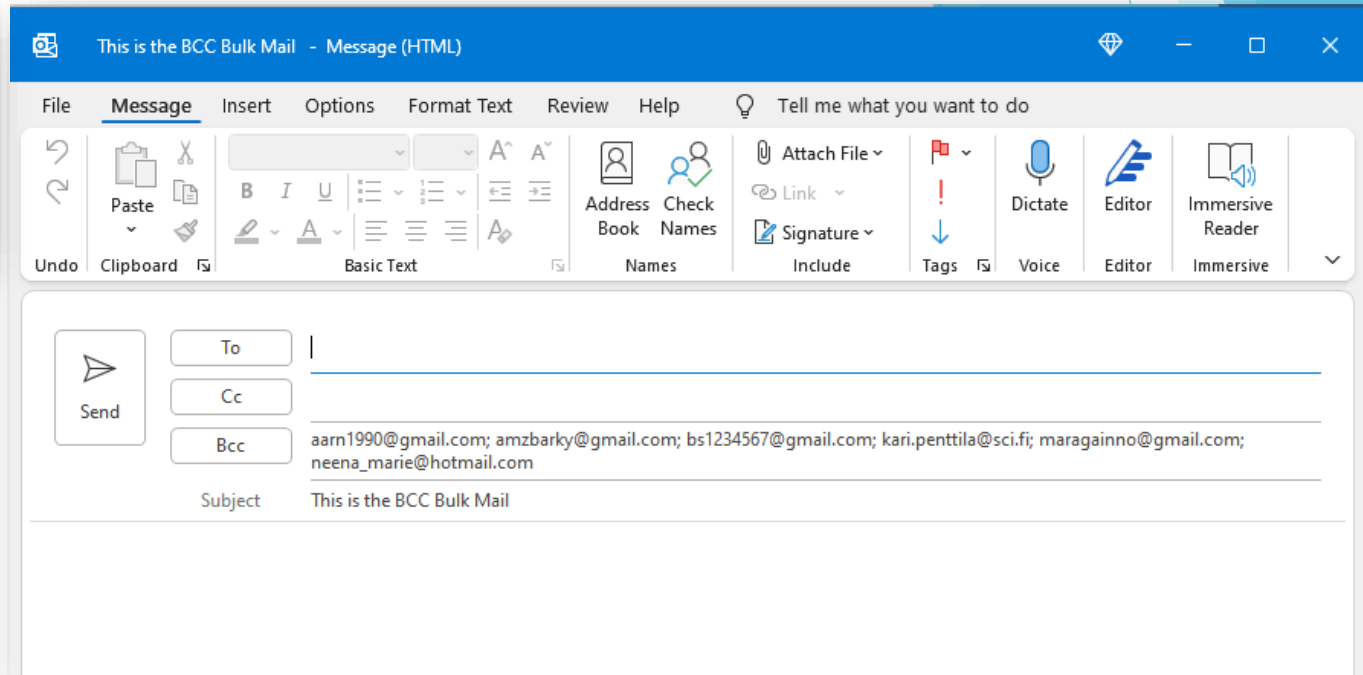Enter a subject for the email which will be recorded on each contact record.

OK

Cancel

This is the BCC Bulk Mail

This is the BCC Bulk Mail - Message (HTML)

File | Message | Insert | Options | Format Text | Review | Help | Tell me what you want to do

Paste | B I U | Address Book | Check Names | Attach File | Link | Signature | Dictate | Editor | Immersive Reader

Undo | Clipboard | Basic Text | Names | Include | Tags | Voice | Editor | Immersive

Send

To

Cc

Bcc: aarn1990@gmail.com; amzbarky@gmail.com; bs1234567@gmail.com; kari.penttila@sci.fi; maragainno@gmail.com; neena_marie@hotmail.com

Subject: This is the BCC Bulk Mail

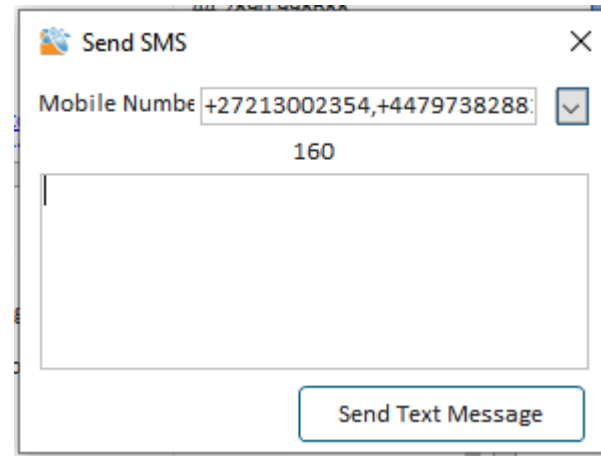intelligence

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Bulk SMS

1. You can send a bulk SMS using a 3rd party subscription service from TextAnywhere. Please contact us for more information on this service.

2. You'll be prompted to type in, or copy/paste your SMS entry.
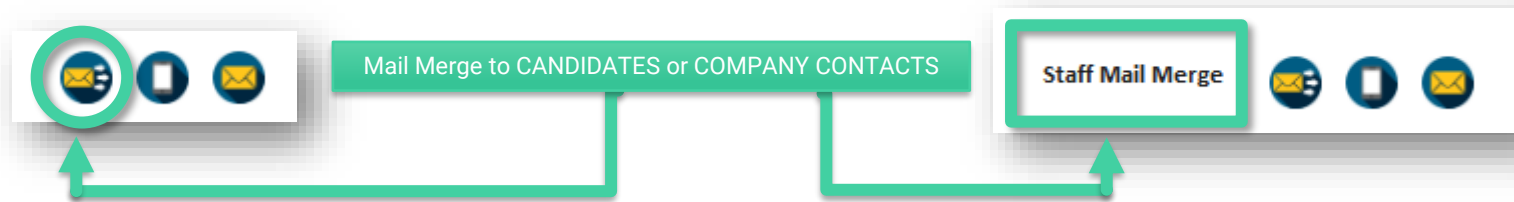
Send SMS

Mobile Number: +27213002354,+4479738288

160

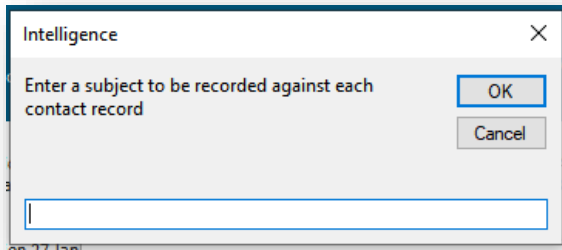**Send Text Message**

3. You will be able to track delivery and receipt of your messages from the TextAnywhere client dashboard on their website.
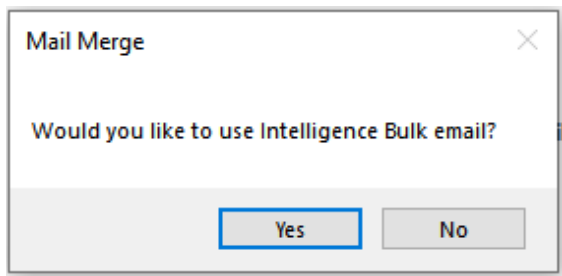
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Mail Merge using an HTML template

Mail Merge to CANDIDATES or COMPANY CONTACTS

Staff Mail Merge

1. Enter text that will show in the Communications section of each recipient.

Intelligence

Enter a subject to be recorded against each contact record

OK

Cancel

3. Add a subject line for the email – this can be personalised using the bookmarks available on the right.

The bookmarks start and end with "fld": e.g. fldFirstNamefld is the Candidate's first name.

MailMerge

Copy and paste the fields from the right hand box into the subject or message body and these will be filled in by Intelligence before sending the email to each recipient.

Subject: Happy Birthday fldFirstNamefld

fldCanIDfld
fldTitlefld
fldFirstNamefld
fldMiddleNamefld
fldSurnamefld
fldSalutationfld
fldAddressfld
fldAdd2fld
fldAdd3fld
fldAdd4fld
fldAdd5fld
fldPostCodefld
fldMobilefld
fldTelfld
fldWorkfld
fldEmailfld
fldFaxfld
fldURLfld
fldDOBfld
fldSexfld
fldMinSalfld

Original CV
Formatted CV
Candidate File
Browse

4. Select the HTML template by browsing for it on your computer. You MUST attach the image file referenced in the template – you can do this by browsing for the image on your computer.

5. You can schedule the mailer to send out after a certain time, or send it in batches – you decide how many mails you want to send and how often.

2. Select YES to use a HTML template, or select NO to use MS Word's mail merge wizard.

Mail Merge

Would you like to use Intelligence Bulk email?

Yes   No

Delay sending emails until after   Send in batches of   Every   minutes

Send this Email to all Contacts

You can browse for a .htm template document. This will allow you to send a html email where the field names surrounded by 'fld' (eg. fldfirstnamefld) are replaced by Intelligence. If you select a document name the body text on this form will be ignored.

6. Click on the button "Send this email to all Contacts" when you are ready, and the emails will be sent out of Outlook automatically.

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Mail Merge using MS Word wizard

Mail Merge to CANDIDATES or COMPANY CONTACTS

Staff Mail Merge

1. Enter text that will show in the Communications section of each recipient.

Intelligence

Enter a subject to be recorded against each contact record

OK

Cancel

2. Select YES to use a HTML template, or select NO to use MS Word's mail merge wizard.

Mail Merge

Would you like to use Intelligence Bulk email?

Yes   No

AutoSave ⬤ Off   Document1 - Word   Search (Alt+Q)   B Sanders

File   Home   Insert   Draw   Design   Layout   References   Mailings   Review   View   Help   💬 Comments   Share

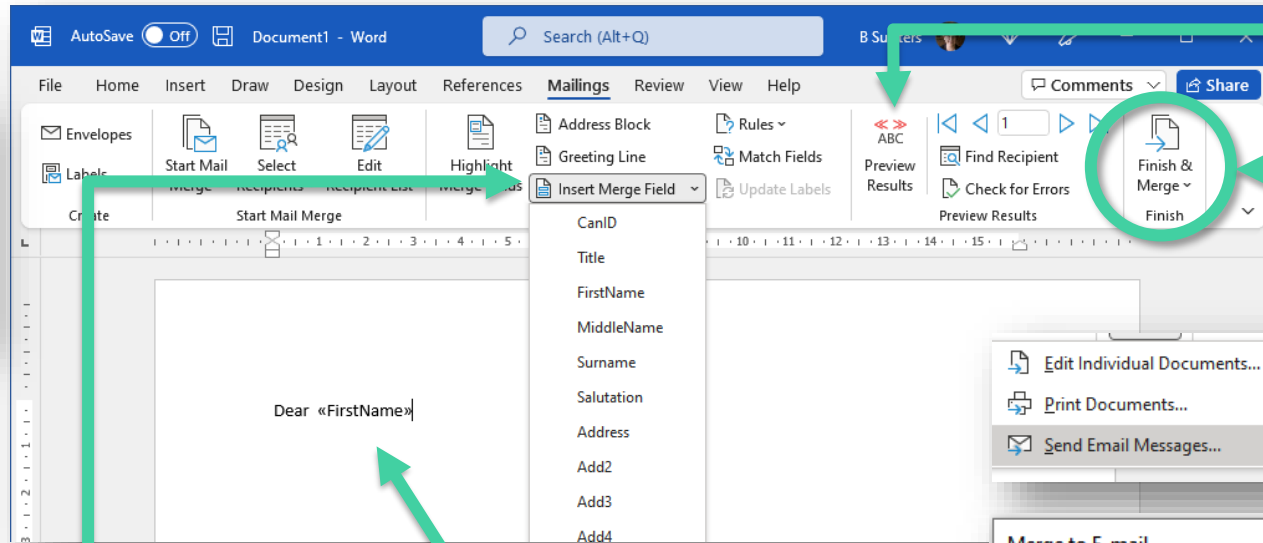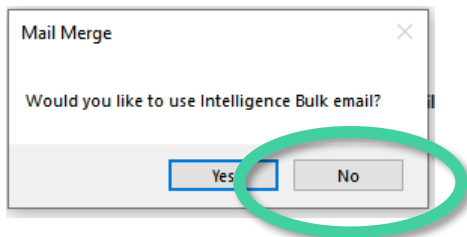Envelopes   Start Mail   Select   Edit   Highlight   Address Block   Rules   Match Fields   Preview Results   Find Recipient   Check for Errors   Finish & Merge

Labels   Insert Merge Field   Update Labels

Create   Start Mail Merge   Preview Results   Finish

Insert Merge Field

- CanID
- Title
- FirstName
- MiddleName
- Surname
- Salutation
- Address
- Add2
- Add3
- Add4

Dear «FirstName»

3. Select the required fields from the "Insert Merge Field" option, and

4.Type or copy/paste the rest of your mailer as you want it to look. This information will display in the body of the email.

TIP: remember to include your email signature in this document!

Edit Individual Documents...

Print Documents...

Send Email Messages...

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5. You can preview your results to see how the mailer will look before you send it out.

6. Select Finish & Merge > Send Email Messages and add in your Subject Line.

There isn't any need to change any other information.

Click on "OK" when you are ready, and the emails will be sent out of Outlook automatically.

Merge to E-mail   ?   X

Message options

To: Email

Subject line:

Mail format: HTML

Send records

⬤ All

◯ Current record

◯ From: To:

OK   Cancel

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