

# WinSearch Email Basics

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## *Topics for Discussion*

In today's training we will cover the following topics:

- Overview of WinSearch Email Screen
- WinSearch Email Settings/Setting up your WinSearch Email Signature
- Sending an email through WinSearch
- Adding an attachment to a WinSearch Email
- Sending bulk emails from WinSearch

## *Overview*

Sending email directly from WinSearch offers the following benefits:

- Allows you to include attachments stored in your WinSearch database
- Sending bulk emails, individually to recipients, is a simple process
- Activities created as a result of Automatic Email Logging can be linked to multiple entities above and beyond the primary recipient, such as Job Orders and Companies
- Emails can be initiated from virtually every screen in WinSearch, making it accessible and convenient.

## *The WinSearch Send Email Screen*

There are three main components to the WinSearch Email Screen:

1. **List of Recipients** – who the email is intended for. Emails to multiple recipients can be sent as a single email or as individual emails with a personalized salutation.
2. **Adding Attachments** – Resumes and other documents stored in the database can be attached to emails by clicking on the **Add Attachments** button.
3. **Email Message** – type or copy/paste text to be emailed. An attachment list can be added by clicking the **Add Attachment List** button below the text field. Other options available include **Auto Spellcheck, Include Salutation, Include Signature File.**

# WinSearch Send Email Screen

1. List of Email Recipients

2. Add Attachments

The screenshot shows a 'Send Email' dialog box with a blue title bar. It is divided into three main sections. The top section is for recipients, with a list of names and email addresses. The middle section is for attachments, featuring a button and a large empty text area. The bottom section is for the subject and message content, including a text area, a 'Send' button, and a 'Cancel' button. Three arrows point from external text labels to specific parts of the interface: one to the recipient list, one to the attachments button, and one to the subject text area.

**\*Email: To:**   Resume Submittal

1. Select From DB or Type Email Address.  
2. Press Enter to Add.  
3. Right Click Entries for Options.

To:	Gaither, Beth	bgaither@aa.com
To:	Freeman, Brad	bfriedman@aol.com
To:	Franklin, Ben	bfranklin@bifocals.com
To:	Finkelstien, Bradley	brad@figs.com
To:	Dilts, Bryan	bdilts@bfg.com

**Attachments**

1. Click This Button to Add Attachments.  
2. Right Click Entries for Options.

**Subject:**

1. Enter Msg. Text Here, or, Use Popup Editor.  
2. Msg Will Be Transmitted when You Click the Send Email Button.

Auto Spellcheck Email   Include Salutation  Include Signature File

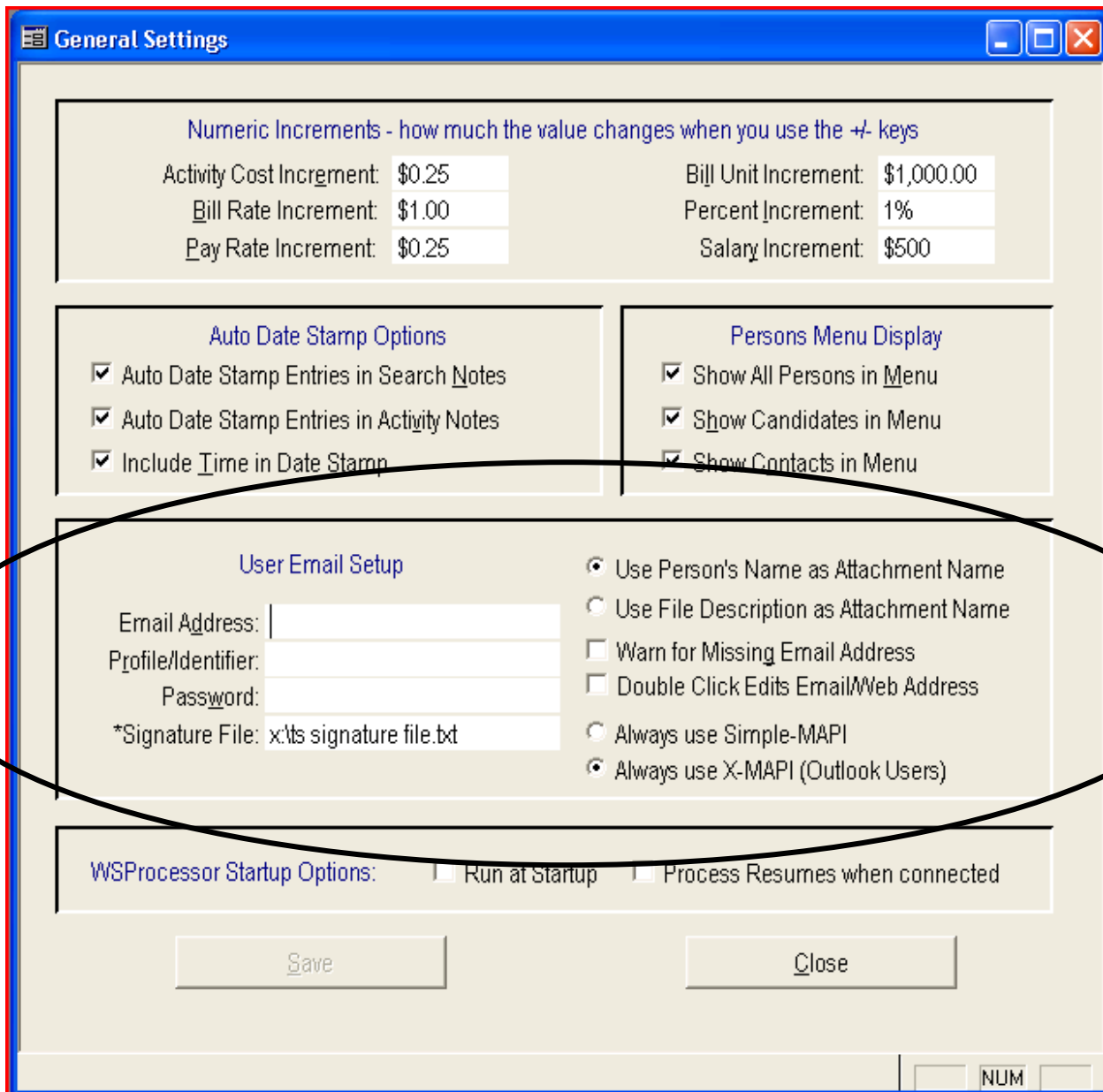
NUM

3. Email Message

## WinSearch Email Settings

Before sending email in WinSearch, there are certain settings to consider. To access WinSearch Email settings go to **SETTINGS | USER OPTIONS | GENERAL SETTINGS**.

Look for the **User Email Setup** found in the bottom portion of the General Settings screen, as seen below:



The screenshot shows the 'General Settings' dialog box with several sections. The 'User Email Setup' section is circled in black. The settings are as follows:

Numeric Increments - how much the value changes when you use the +/- keys	
Activity Cost Increment:	\$0.25
Bill Rate Increment:	\$1.00
Pay Rate Increment:	\$0.25
Bill Unit Increment:	\$1,000.00
Percent Increment:	1%
Salary Increment:	\$500

Auto Date Stamp Options	Persons Menu Display
<input checked="" type="checkbox"/> Auto Date Stamp Entries in Search Notes	<input checked="" type="checkbox"/> Show All Persons in Menu
<input checked="" type="checkbox"/> Auto Date Stamp Entries in Activity Notes	<input checked="" type="checkbox"/> Show Candidates in Menu
<input checked="" type="checkbox"/> Include Time in Date Stamp	<input checked="" type="checkbox"/> Show Contacts in Menu

User Email Setup	
Email Address:	<input type="text"/>
Profile/Identifier:	<input type="text"/>
Password:	<input type="password"/>
*Signature File:	x:\ts signature file.txt
	<input checked="" type="radio"/> Use Person's Name as Attachment Name
	<input type="radio"/> Use File Description as Attachment Name
	<input type="checkbox"/> Warn for Missing Email Address
	<input type="checkbox"/> Double Click Edits Email/Web Address
	<input type="radio"/> Always use Simple-MAPI
	<input checked="" type="radio"/> Always use X-MAPI (Outlook Users)

WSProcessor Startup Options:
<input type="checkbox"/> Run at Startup
<input type="checkbox"/> Process Resumes when connected

Buttons: Save, Close

The following is a brief description of these settings. In most cases your settings will mirror what is selected in the image above.

## Description of Email Settings

**Email Address:** Enter your email address in this field if you would like to receive a copy of every email that you send through WinSearch in your Outlook Inbox. Most people opt to leave this blank since the email will appear in your sent items folder.

**Profile/Identifier & Password:** The email program you use may require you to indicate your Profile/Identifier, or email username, and password before sending the email. Outlook users can leave those two fields blank.

**Signature File:** This must be setup in WinSearch in order to include a signature file with your WinSearch emails. This is different from your Outlook signature. Steps for setting up the Signature File will be covered in the next section.

**Use Person's Name as Attachment Name:** Check this off if you would like attachments to use the person's Last Name, First Name as the attachment name.

**Use File Description as Attachment Name:** Checking this off will use the document description as opposed to the person's name. You will want to be mindful of what you put in the description field on the documents table.

**Warn for Missing Email Address:** Un-check this if you did not enter your email address in the aforementioned Email Address field. When checked, if you have not entered your email address in these setting you will get prompt that your email address is missing each time you send an email.

**Double Click edits Email/Web Address:** With this box checked off, if you double click on an email address or web address (stored in a UDF) it will allow you to edit that field. If it is not checked off it will launch a new email or the website accordingly.

**Always use Simple-Mapi:** This setting may be necessary if you use an email client other than Outlook.

**Always user X-Mapi (Outlook Users):** Outlook users- check off this box.

## *Email Signatures in WinSearch*

You have one primary email signature in WinSearch.

### **Setting up an Email Signature for WinSearch Emails**

1. Decide where you want the email signature stored. In multi-user environments, the easiest solution is to create an Email Signatures folder in the WinSearch folder and have all users put their email signature files in there. Otherwise, the files can be stored in any location.
2. Create a text file in the desired location. This may mean getting to that folder and choosing the **FILE | NEW | TEXT DOCUMENT** command. Name the file something descriptive, such as your name or WS Signature File.
3. Enter what you want for the email signature. Since this is a text file, you cannot include graphics or formatting.
4. Save the text file. Often this is done with the **FILE | SAVE** command.
5. Close the text file.
6. Switch to WinSearch and log in as that user.
7. Choose the **SETTINGS | USER OPTIONS | GENERAL SETTINGS** command and move to the Signature File text box.
8. Press the **F2** function key and pick the file that you created in step 2.
9. Choose **SAVE**.

Now, when you send an email from within WinSearch, you can check off the Include Signature File check box and the contents of that file will be included.

### **Modifying your WinSearch Email Signature**

10. In WinSearch, choose the **SETTINGS | USER OPTIONS | GENERAL SETTINGS** command and move to the Signature File text box.
11. Highlight the contents of the Signature File text box entry and press **CTRL+C**.
12. Select **CANCEL**.

13. Select the **START** button and choose **RUN**.
14. Press **CTRL+V** to paste the Signature File entry in the text box and choose **OK**. This opens the signature file, usually in **Notepad**.
15. Make your changes.
16. Save your changes with the **FILE | SAVE** command.
17. Close the file with the Close button or the **FILE | EXIT** command.

The next time that you send an email in WinSearch, it will use the modified contents of that file.


### *Sending an Email through WinSearch*

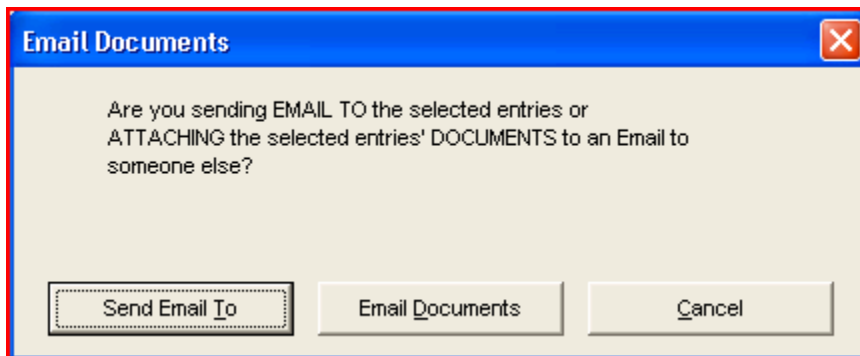
These are the steps for sending a single email from WinSearch. (Steps for sending bulk emails appear below.)

#### **To send an email:**

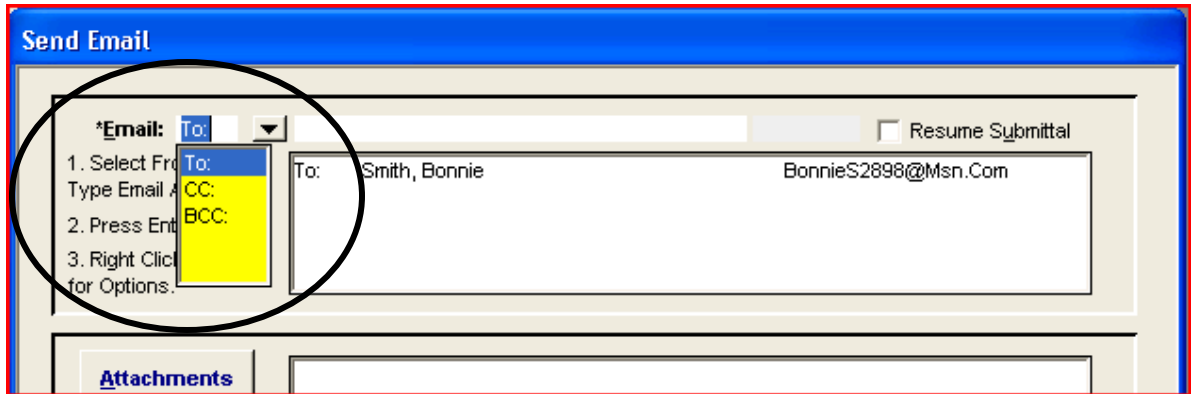
1. Go to the person(s) to whom you wish to email or whose documents you wish to send. While you do not have to perform this step, it saves you steps further down the road.

➡ TIP: Need the email activity to include a Job Order link? Start the email from the Job Order, rather than the candidate or contact. Starting an email from a Search owned by a Job Order works the same way.

2. Start the email. You can do this several ways: Press **(F11)**, click the **Send Email** toolbar button , or select the **SETTINGS | SEND EMAIL** command. Other methods include right-clicking an email address and choosing **SEND TO THIS ADDRESS** from the popup menu or by double-clicking an email address.
3. Select **Send Email To** on the following screen:



- When the Send Email screen pops up, begin by entering any additional recipients you wish to include. You may do this by typing in the text field provided or selecting the name(s) from the drop down list. Hit enter once the name appears in the text field. You may CC or BCC recipients as well by click on the TO: field and selecting those options from that list, as seen below.

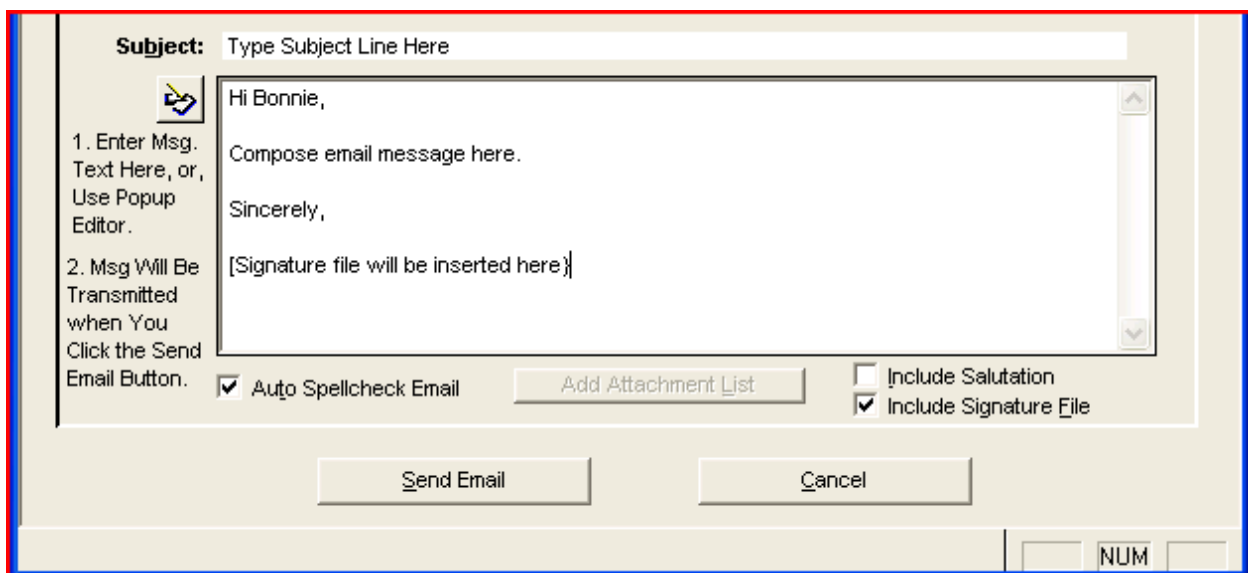


- At this point, attachments can be added to the email. Specific steps for adding attachments will be covered in a later section.
- Enter a subject for the email in the **Subject** line.
- In the area under the Subject line, compose your email as you would in Outlook.
- Below the email message body there are three check boxes.

**Auto Spellcheck Email**- checks the email message for spelling errors and offer suggestions for corrections.

**Include Salutation**- personalizes the email using a default, such as "Dear" followed by the person's first name. Typically used when sending a bulk email.

**Include Signature File** – Places the signature file that you set up under General Settings on the bottom of your outgoing email.



9. Click **Send Email**. The email will be visible in your **Sent Items** folder in Outlook.

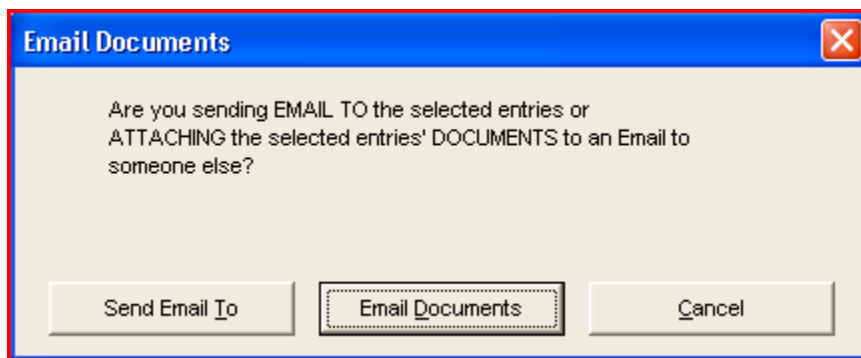
### *Adding Attachments to a WinSearch Email*

Emailing attachments through WinSearch is typically done one of two ways.

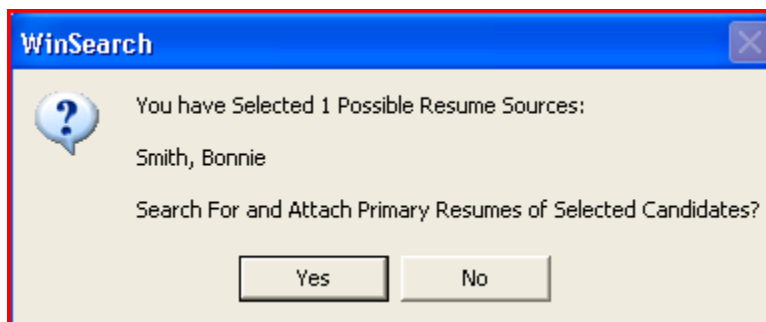
- Clicking the **Send Email** icon on the person's record that owns the file that you wish to attach. This will give the option of attaching the primary document for that record automatically.
- Clicking on the **Attachments** button on the Send Email screen and locating the file from there.

#### **Starting from the Record with the Attachment**

1. Bring up the record that owns the attachment you wish to send and click on the **Send Email**. For example, if you want to email Bonnie Smith's resume, bring up her record and click on the icon from there.
2. On the **Email Documents** prompt, select **Email Documents**. (see below)



3. When the **Send Email** screen pops up, click on the **Attachments** button. You will see a prompt that asks you if you would like to attach the primary resume for that candidate. Click **Yes** to attach the primary document.



4. If you wish to attach additional documents, follow the steps in the next section.



## Adding Attachments from the Send Email Screen

1. Click on the **Attachments** button on the WinSearch Send Email screen.
2. The **Select Email Attachments** screen will appear. Below is an overview of that screen.

The top portion of the screen allows you to look up **Document Sources**, in other words, Persons or Company records that contain documents that you want to email.

The middle section lists the **Available Documents** for each of the document sources selected above.

The bottom section lists the **Attachments** you have selected to include with the email.

### Document Sources

### Available Documents

**Document Sources:**

1. Lookup Persons & Companies Not in the List Already for Documents to Attach.  
2. Press Enter to Add Them to the List.  
3. Select the Person or Company to Display their Documents in the List Below.

\*Enter Person/Company Name to Lookup

Persons All Persons  
 Companies Std Docs

505 Smith, Bonnie

**Avail. Documents:**

4. Double Click any Document to Attach.  
5. Use the Edit Button to Review or Edit.  
6. Be Sure to SAVE Changes Before Sending.

WSResume Resume/Document Bonnie Smith

Edit/Review Document/File

**Attachments:**

7. Selected Files and Documents to be Sent in Fax or Email.  
8. Use the Additional Files Button to Attach Files NOT Stored in Your Database.

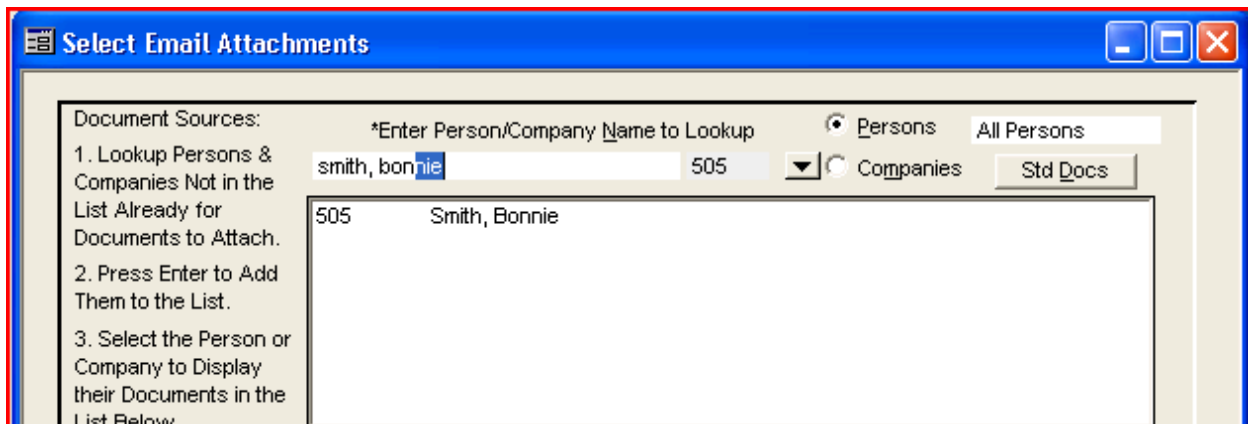
Edit/Review Doc/File Attach Primary Docs Additional Files

Ok Cancel

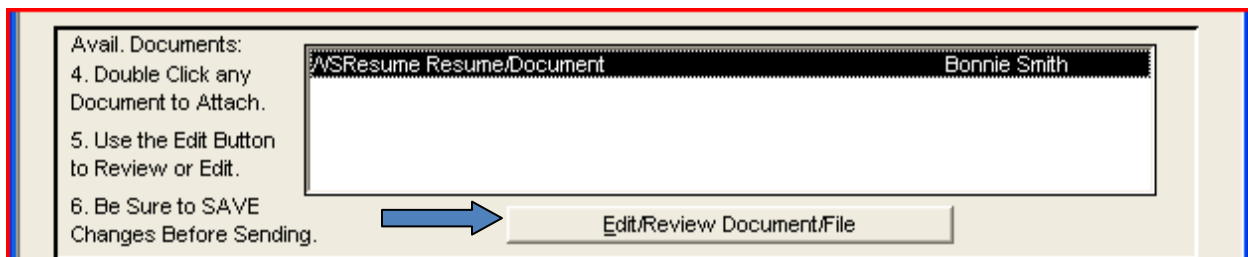
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### Attachments

- Under **Document Source**, select between Persons and Companies.
- Type in the name of the person or the company that you would like to find, for persons start with the last name.
- Once you have found the record that want, hit enter so that the name appears in the list box below, as Bonne Smith does below.



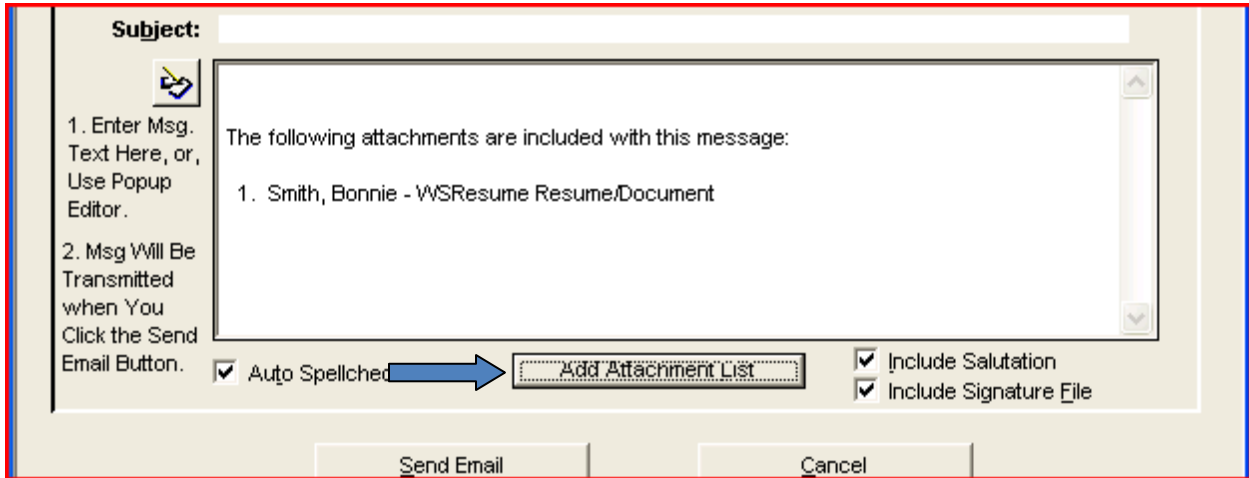
- Highlight the name of the person or company to view a list of documents attached to that record under the middle section, **Available Documents**.
- To preview the document or make changes, highlight the file that you want and click the **Edit/Review Document/File** button.



- To select a file or document to attach, double click on it in the **Available Documents** list and it will appear below in the **Attachments** list.
- Below the list of attachments there are buttons for the following three options:
  - Edit/Review Doc/File** – Review the file that has been attached
  - Attach Primary Docs** – selects the primary document for all the document sources listed in the top portion of the screen
  - Additional Files** – allows you to browse for files or documents that are not stored in the WinSearch database.

10. When you are finished, click **OK** to return back to the **Send Email** screen.

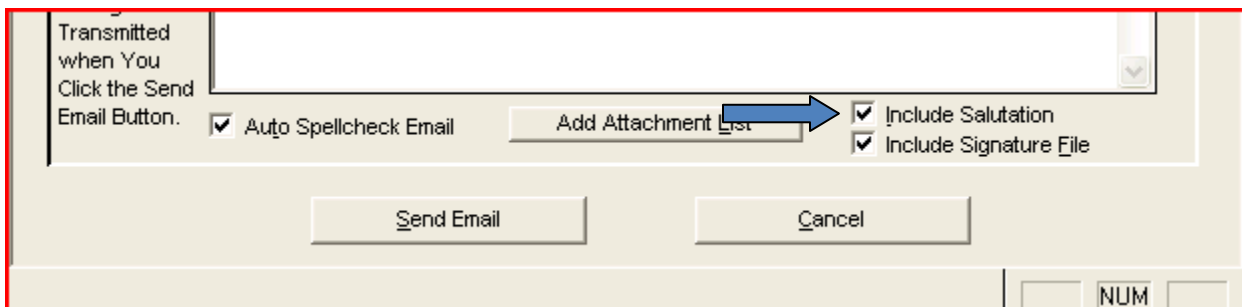
➔ TIP: WinSearch can include a detailed list of the attachments that you are sending. On the WinSearch Send Email screen, simply click the **Add Attachment List** button to have the list automatically appended to the body of your email.



### *Sending a Bulk Email*

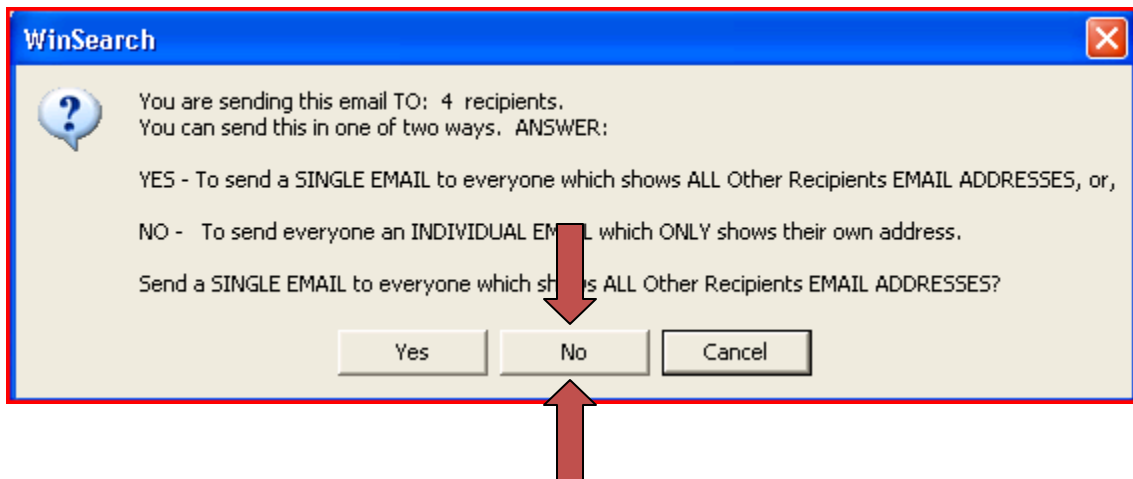
The steps for sending a bulk email don't differ greatly from sending a single email. There is one important step at the end that determines whether to send a single email or individual emails.

1. Highlight the list of people that you would like to email. (If you haven't put together a list you can also select the recipients from the Send Email screen as detailed **Step 4** in the *Sending an Email through WinSearch* section.)
2. Click **Send Email** icon and select **Send Email To** on the resulting screen.
3. Compose the email and add attachments as you normally would.
4. If you plan to send the email individually to recipients and would like a personalized salutation, check off the **Include Salutation** check box located at the bottom of the screen, seen below:



5. Click Send **Email**.
6. **FOLLOW THE PROMPTS CAREFULLY.** The final prompt that you receive gives you the option of sending out single email, all recipients would see each other, or an individual email, the preferred method.

To send an **INDIVIDUAL EMAIL** click **NO** on this prompt:



7. Individual emails will be sent, including a personalized salutation if that option was selected. All emails can be seen from your Outlook **Sent Items** folder.