

“

1.1.1
the most user friendly and
functional recruitment software
on the market today.

”



User Guide

Document Template Administration

The logo for Eclipse Recruitment Manager. The word "eclipse" is in a bold, lowercase sans-serif font. The letter "e" has a red dot above it, the "c" has a green dot above it, and the "i" has a blue dot above it. To the right of "eclipse" is a small "TM" trademark symbol. Below "eclipse" are the words "RECRUITMENT" and "MANAGER" in a smaller, uppercase sans-serif font, separated by a space.

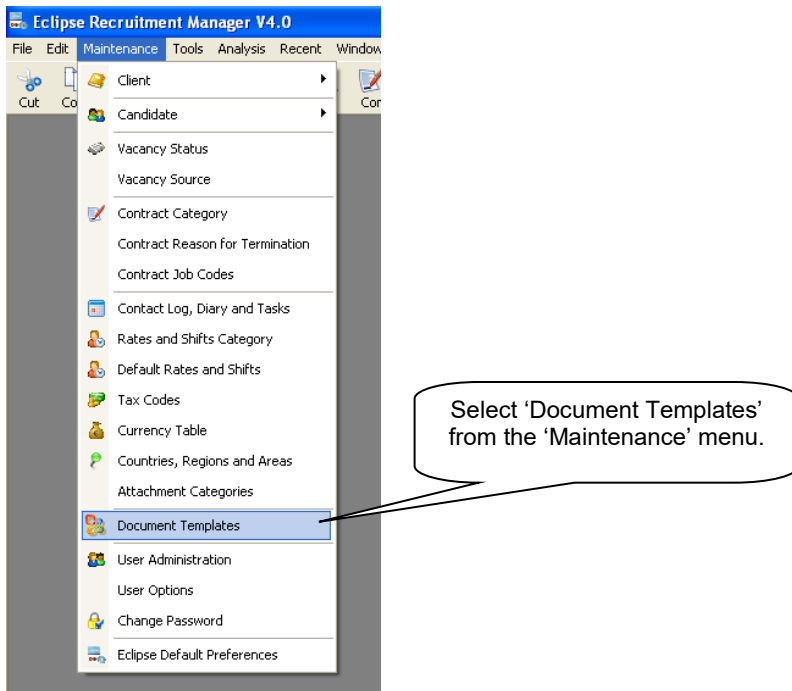
Document Template Administration and Related Features:

Features and Related Topics:

- 1.1.1 1
- 2 Document Template Administration:.....3
- 3 Creating a New E-Mail Document Template:.....4
 - 3.1 Editing and Deleting Existing Templates:.....6
- 4 Creating a New SMS Template:6
- 5 Creating a New Word Document Template:7
- 6 Master Document Templates:..... 10
- 7 CV Formatting Options: 11
 - 7.1 Creating a CV Template: 12
 - 7.2 Formatting a Candidate’s CV Using a Template:..... 13
 - 7.3 Formatting a Candidate’s CV from the Original: 14
 - 7.4 Creating a Macro: 14
 - 7.5 Formatting CV’s using a Macro:..... 16
- 8 Creating a CV Coversheet: 16
 - 8.1 Creating the Coversheet Document:..... 16
 - 8.2 Outputting the CV Coversheet: 18
- 9 Outputting Documents:20
 - 9.1 Outputting a Word Document:20
 - 9.2 Outputting an E-mail Document:.....22
- 10 Attaching Documents, Files and CV’s to an E-mail:24
 - 10.1 Attaching a Document to an E-mail:24
 - 10.2 Attaching a File to an Email Template:26
 - 10.3 Attaching a CV to an Email Template:.....26
- 11 Sending the Email to the Outbox:.....27
- 12 Mail Shots:29
- 13 Creating a New Excel Export Template:30

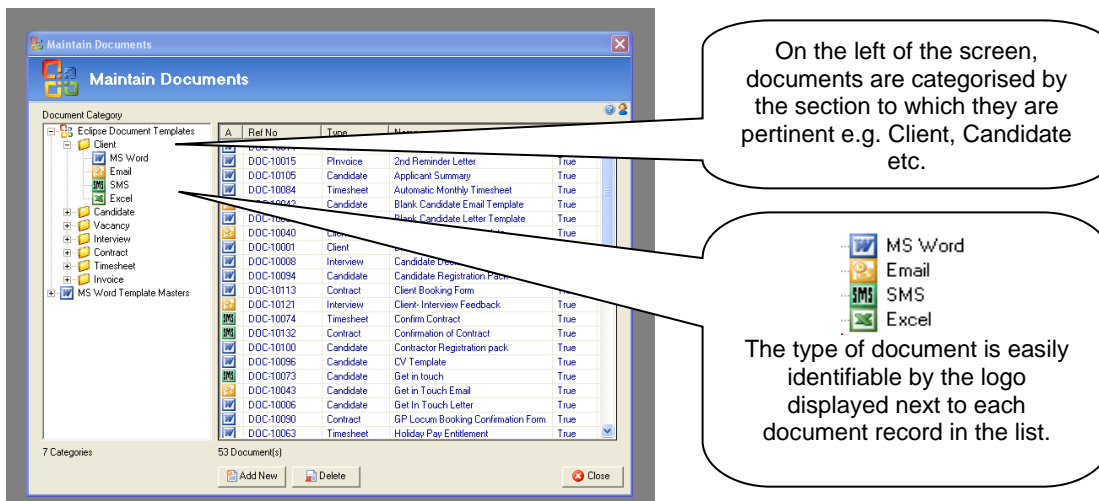
2 Document Template Administration:

This facility allows the creation of document templates required for correspondence via letter, e-mail and SMS text message. Additionally, this feature also allows the output of custom built Excel exports. In order to administer this feature of Eclipse, select 'Document Templates' in the Maintenance menu as shown below.



Selecting 'Document Templates' activates the following window: 'Maintain Documents'. This section of the Maintenance menu initially provides 26 standard document templates suitable for outputting either letters or e-mails through Eclipse. These templates utilise a mail merge feature for quick and easy output of correspondence. Further templates can be added to this section as and when required. Additionally, templates for excel exports can be configured here and text messages templates for use in conjunction with the SMS bolt-on feature.

On the left of the screen, documents are categorised by the section to which they are pertinent e.g. Client, Candidate etc. The type of document is easily identifiable by the logo displayed next to each document record in the list.



Selecting a category in the tree view on the left (e.g. client) will display a list of ALL document templates within that section, regardless of type, in the window on the right.

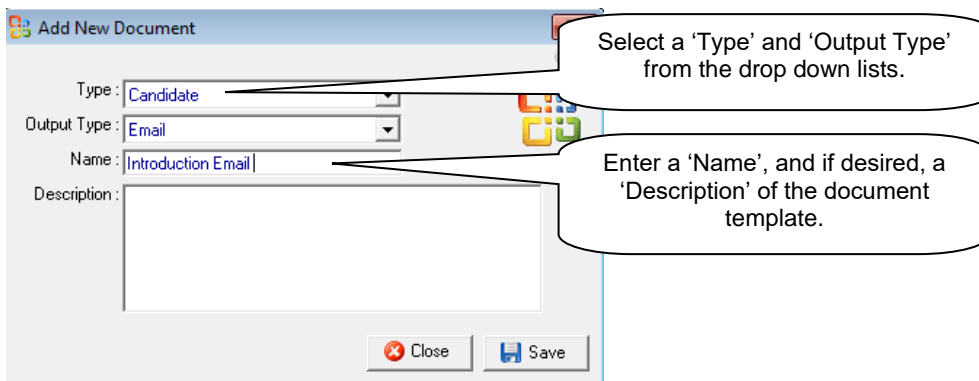
To view specific document types only, e.g. word documents, relating to that category, simply select the 'Word' icon within the required category. The results window will now display only Word document templates. The same applies to E-mail and SMS templates and excel exports.

Opening other sections (e.g. vacancy) is achieved by clicking the '+' in the tree view in the left hand window. As per the above image, the three 'document type' icons appear.

At the bottom of the document category tree, there is a section entitled 'MS Word Template Masters'. This section is broken down into the various sections in Eclipse and displays Microsoft Word Master Templates. These templates are often the starting point when creating new template documents.

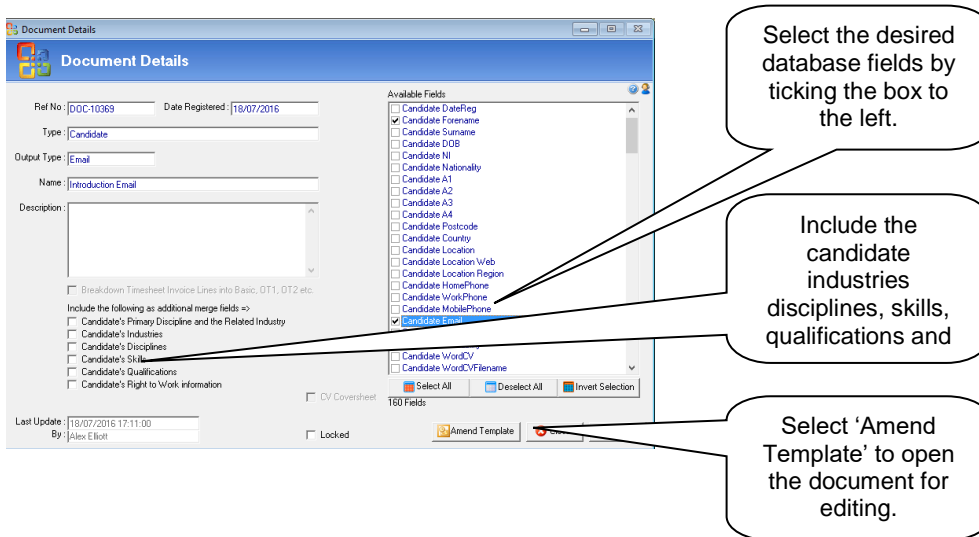
3 Creating a New E-Mail Document Template:

To create a new e-mail document template simply select 'Add New' to open the screen below:



In order to assign the document to a section of Eclipse, select the document type from the drop down list. Next choose the 'output type' e.g. Word / E-mail / SMS / Excel from the drop down list.

Assign the document a name. This will be used for selection purposes when sending correspondence. Adding a description for reference purposes may also be useful. Selecting 'Save' at this point will present the following 'Document Details' screen:



The left side of the window displays the document specifics e.g. Ref No., Date Registered, Type, Output Type, Name and Description. In the bottom left hand corner, there is a date stamp detailing when the document template was last updated and by who. When viewing a document's details, these options are all locked.

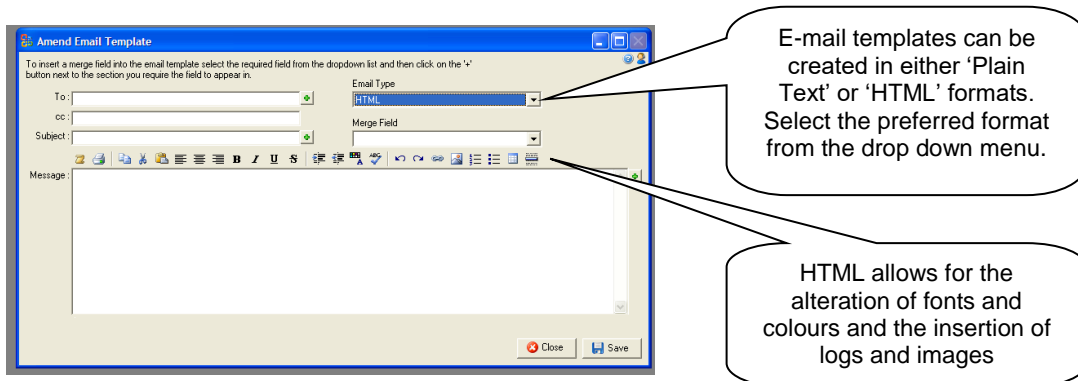
The 'Available Fields' section on the right lists all the available merge fields from the specified section of Eclipse (in this example, the client section) which may be used in the document. Scroll through the list, selecting the merge fields required for the template by ticking the box to the left.

Note:

Only select the merge fields necessary for the document. Selecting 'all' will slow down the data merge and will increase the time it takes to send the e-mail. This is particularly important when creating templates for mass mailings.

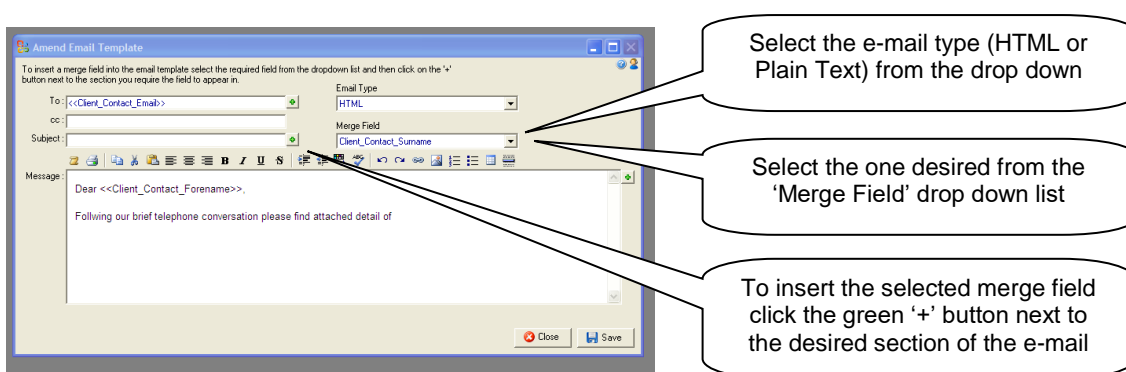
Once all the desired merge fields have been selected, click 'Amend Template'. This will open the document to be edited. In this case, selecting 'Amend Template' activates the 'Amend Email Template' window below.

E-mail templates can be created in either plain text or HTML formats. HTML allows for the alteration of fonts and colours and the insertion of logos and images using the toolbar highlighted below. Such features are not available for e-mails in the plain text format. The following example uses a 'HTML' format.



All template editing is performed using mail merge type editing functions. Database fields can be placed amongst standard text which will automatically populate when a document is created.

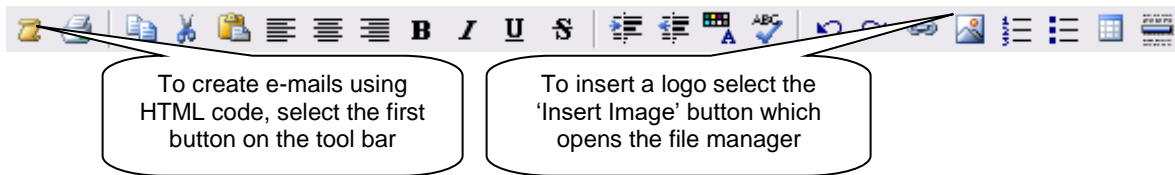
Select a merge field from the drop down list on the right and insert into the template by clicking the '+' button next to the box in which the field is to be inserted.



Note:

Wherever a merge field appears in the template the corresponding piece of information will be pulled through from the database and inserted in its place once the data is merged.

To create email templates containing company logos or coloured fonts, take advantage of the toolbar above the message box. This will allow more adventurous templates to be created using fonts and font styles, colours, tables, bullet points etc. Any emails created as HTML will also benefit from having the option to include images such as logos and there is also a spell-check facility built in. It is also possible to create email template using HTML code. Simply select the first button on the toolbar, 'Toggle Design / code view'.



Rolling the cursor over any of the buttons on this toolbar will provide a tool-tip description of the button's function. This is the same as any other function buttons within Eclipse.

Once the template is complete select 'Save' on the above screen. Select 'Save' again on the subsequent 'Document Details' screen. The email template is then ready for all to use.

To edit an existing document template, select the desired document from the main list. The process for editing the document template is now the same as creating a new one as explained above.

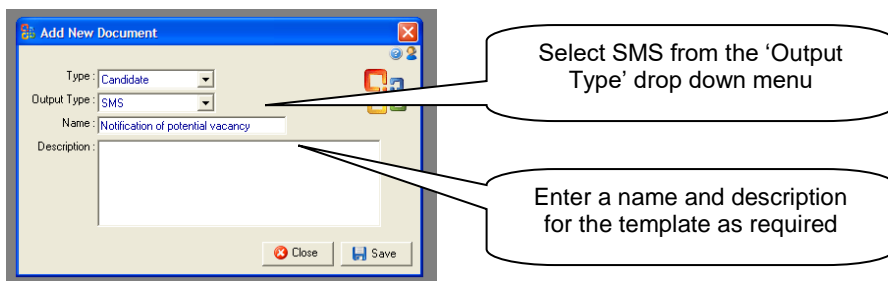
To delete a document template, simply highlight the desired template in the main list and select the 'Delete' button from the foot of the screen.

3.1 Editing and Deleting Existing Templates:

To edit an existing document template, select it from the list and open it by double clicking the mouse. This opens a window entitled 'Document Details'. The process for editing an existing document template is the same as creating a new one as described above. To delete a document template from the list, simply highlight the desired template and select 'Delete'.

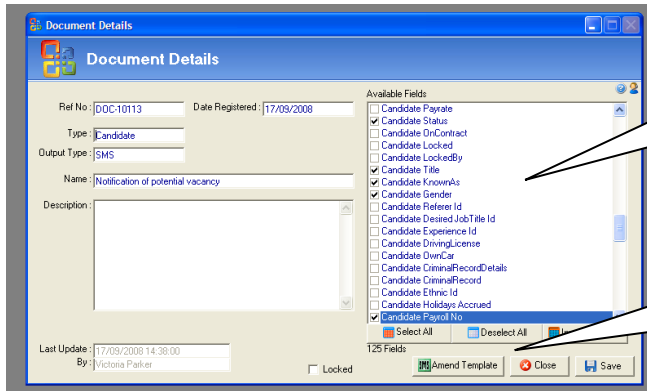
4 Creating a New SMS Template:

Where the SMS bolt-on is activated, the creation of SMS templates is almost identical to the process for plain text email templates as outlined above. Select 'Add New' from the bottom of the initial screen. Complete the details as required ensuring to select 'SMS' from the 'Output Type' drop down:



Once complete select 'Save' to move onto the next step:

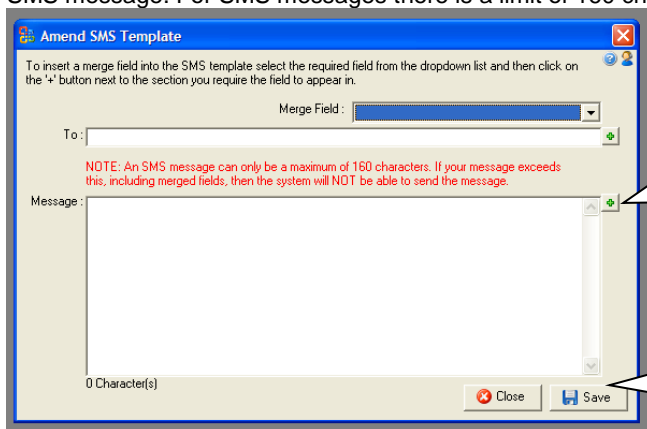
As per the example above for creating e-mail templates, select the desired merge fields for the SMS message from the list on the right.



Select the desired merge fields for the SMS message from the list on the right.

Select 'Amend Template' from the foot of the window to create the SMS message.

Once the relevant fields are checked, select 'Amend Template' from the foot of the window to create the SMS message. For SMS messages there is a limit of 160 characters for the message body.



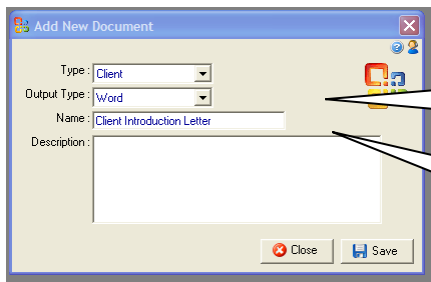
Insert merge fields by selecting the desired fields from the drop down list and then clicking the green '+' button next to the relevant section.

Once the template is complete, select 'Save' and then 'Save' again on the screen that follows.

Create the body of the SMS message in exactly the same way as e-mail templates. Insert merge fields by selecting the desired fields from the drop down list and then clicking the green '+' button next to the relevant section. Once the template is complete, select 'Save' and then 'Save' again on the screen that follows. The template is then ready to use assuming the SMS bolt-on had been activated.

5 Creating a New Word Document Template:

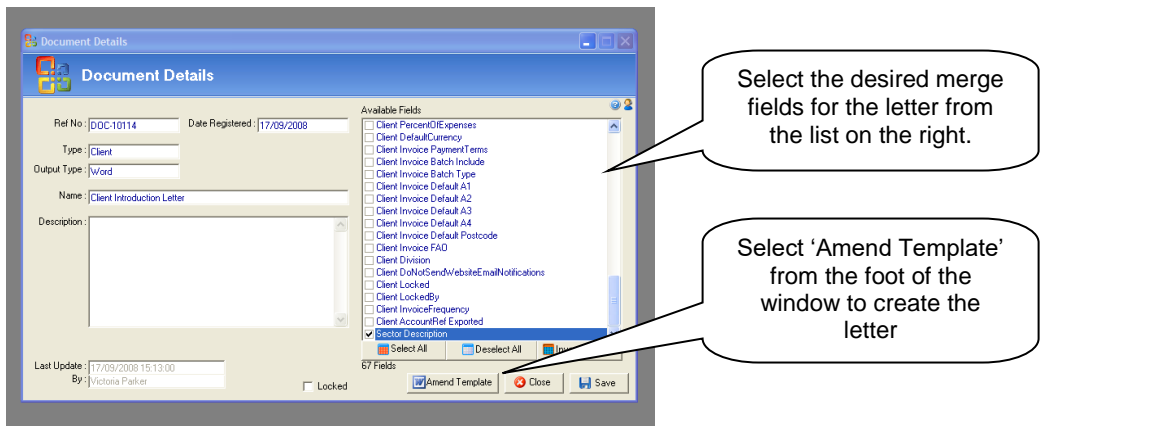
Letter templates are created in a similar fashion to e-mail and SMS templates. First select 'Add New' from the main screen and complete the form below with the relevant information:



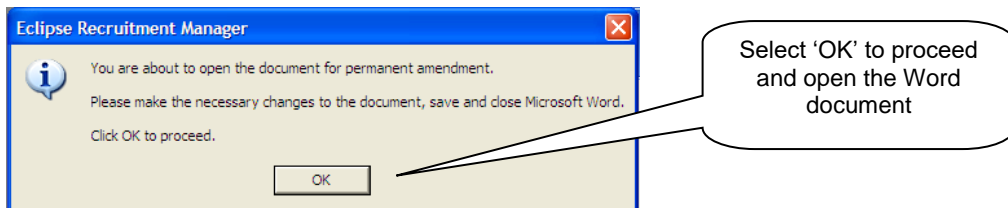
Select 'Word' from the 'Output Type' drop down menu

Enter a name and description for the template as required

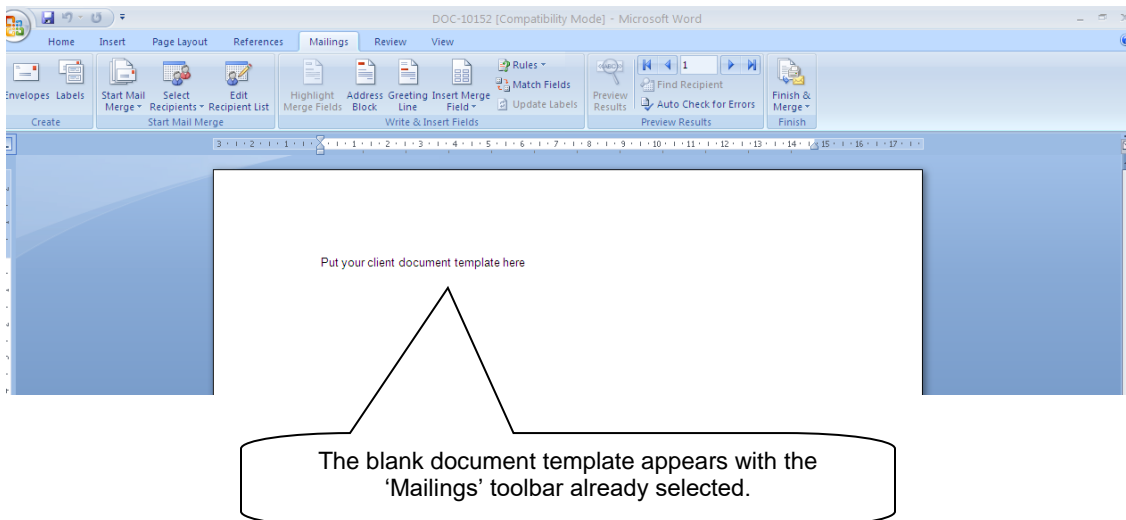
Select 'Save' on this window to open the 'Document Details' screen below. As in the above examples, choose the merge fields required for the document by ticking the desired fields.



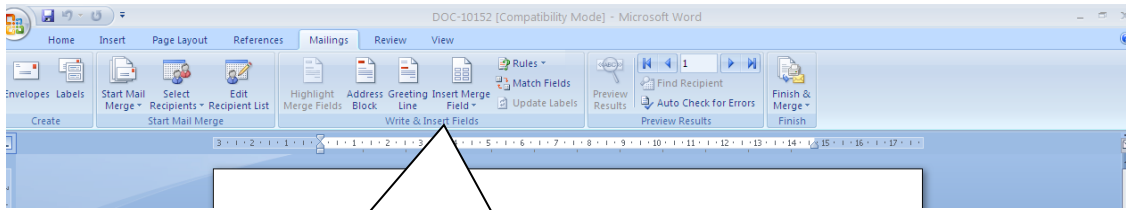
Finally select 'Amend Template' from the foot of the screen. At this point Microsoft Word will open and the following warning appears: Select 'OK' to proceed.



A new Word document will not open as shown below:

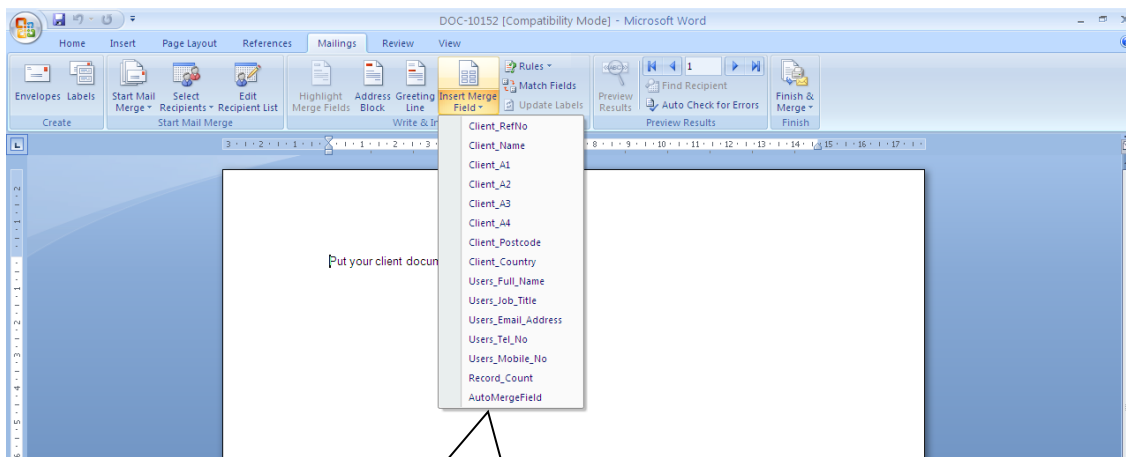


The 'Mailings' tab at the top of the screen allows the configuration of the document template e.g. inserting merge fields etc.



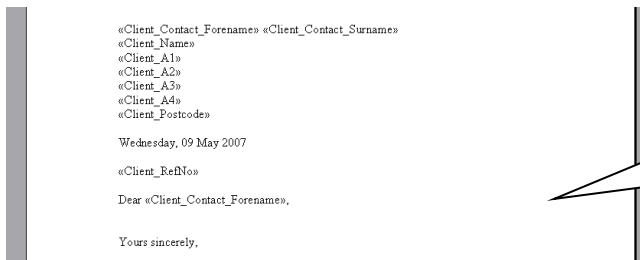
The 'Mailings' tab at the top of the screen allows the configuration of the document template e.g. inserting merge fields etc.

When configuring the letter, the merge fields chosen in the document details window in Eclipse can now be added to the document amongst the standard text. Use the 'Insert Merge Field' button on the Mailings toolbar as shown below:



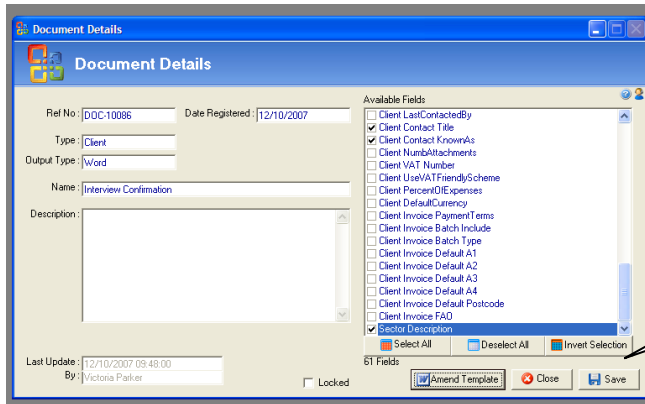
Select 'Insert Merge Field' from the 'Mailings' toolbar.

The image below depicts an example template complete with merge fields:



The Word document with merge fields should look something like this.

To save the document template, select the 'Save' icon on the toolbar at the top of the screen and then close the document. Finally select 'Save' again on the document details screen below. The word template is then ready for all to use.

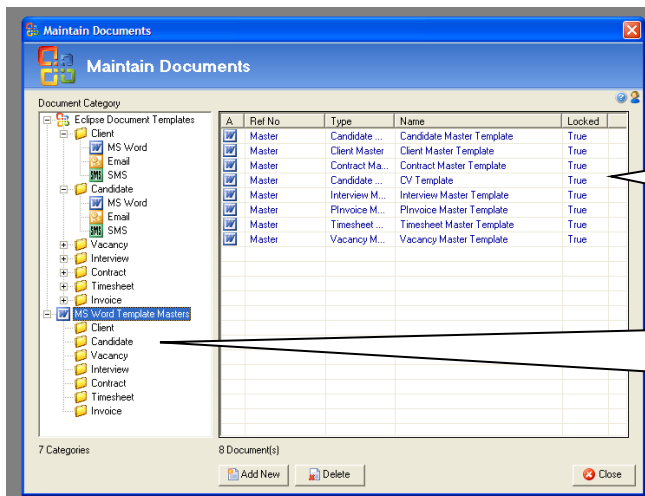


Save the template as usual in Word then select 'Save' in the Document Details window

6 Master Document Templates:

The previous section explained how to create a new word document template using merge fields. To save repeating this process for documents of a similar style and format, Eclipse allows the creation of master document templates. These templates will then serve as a starting point to any further Word documents created.

Select 'MS Word Template Masters' from the 'Document Category' tree. The window to the right displays a list of all the template masters regardless of which section of Eclipse they relate to. Clicking on the individual section in Eclipse e.g. 'Client' will break down the documents by category.



All MS Word Template Masters are listed to the right of the 'Maintain Documents' window.

Clicking on the individual section of Eclipse will break down the documents by category.

To create a new master template, simply select 'Add New' and follow the same process as creating a new Word document template as outlined above.

7 CV Formatting Options:

Where a candidate's original CV is imported into Eclipse, the system automatically generates a send-out CV which is stored in the attachments section of the candidate's record.

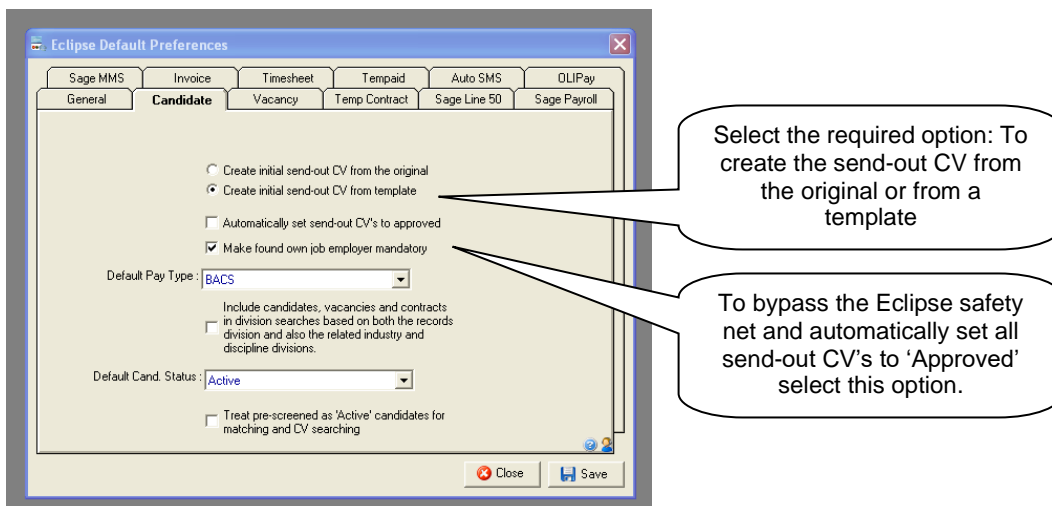
Note:

This send out CV is not, at this point, suitable for issuing to clients, it will first require formatting.

There are two starting points for formatting the send-out version of a candidate's CV within Eclipse:

- The send-out CV is initially an exact copy of the original which can be formatted and saved as required. For example, the candidate's personal details removed and the company logo inserted at the top of the page.
- The send-out CV is initially a pre-configured CV template into which information can be added. This ensures that all CV's issued to clients are in the same company format etc.

Firstly, decide which option will provide the best starting point for the formatting of the candidate's CV's and set the Eclipse Default Preferences accordingly. This can be found in the 'Candidate' tab of 'Eclipse Default Preferences' within the 'Maintenance' Menu as shown below:

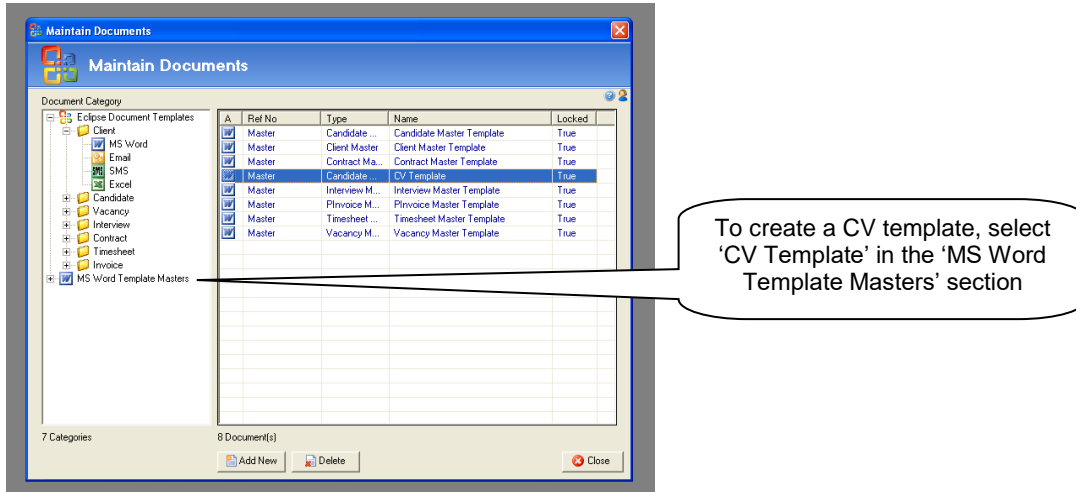


To create the send-out CV from the candidate's original CV select the first box at the top of the screen. To create the CV from a template, select the second box.

The final option relating to candidate's CV's, is the option to automatically set send-out CV's to 'approved'. This will bypass an Eclipse safety net which prevents CV's from being attached to e-mails and sent to clients before their status has been manually set to 'approved'. This ensures that CV's are not forwarded to clients either in their original state or simply as a bank template.

7.1 Creating a CV Template:

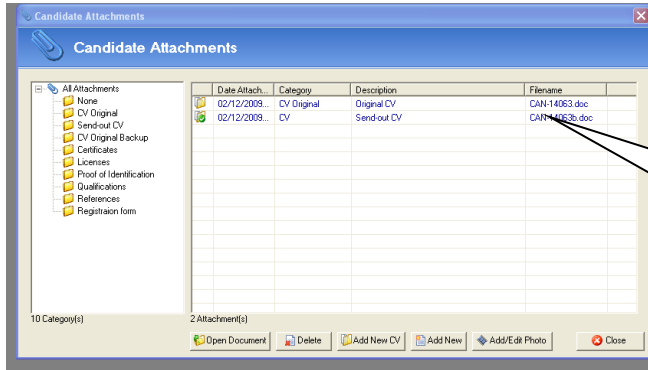
One method of formatting a candidate's CV is to start with a pre-formatted CV template. This will ensure that each and every CV appears in exactly the same format regardless of the content. To create a CV template, select 'CV Template' in the 'MS Word Template Masters' section of the menu as shown below.



Initially this document is blank. Format it by adding company logos and / or headers as desired. Once saved, the margins, fonts and sizes configured here will be copied through to any candidate CV's created via this template.

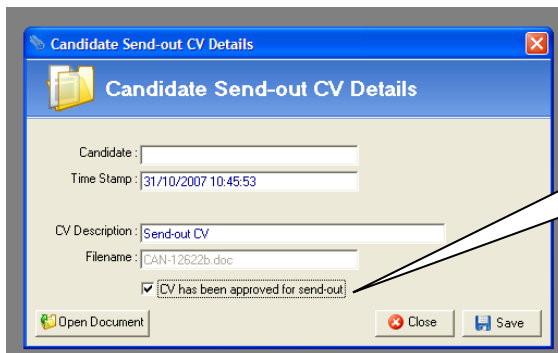
7.2 Formatting a Candidate's CV Using a Template:

Firstly, create a new candidate record in Eclipse, attaching the original CV. Once the import has taken place and the record has been saved, select the paperclip icon at the foot of the candidate's record to display all attachments. This will show a list with the two versions of the candidate's CV:



To open the CV template, highlight and select 'Open Document'

Firstly, highlight the Original CV and select 'Open Document'. This will open the candidate's CV in Word. Secondly select the Send-Out CV and open the document. Both documents should now be open. At this point, the send-out CV is a copy of the CV template configured in the Document Templates section of the Maintenance Menu. Format the CV as required e.g. copy and paste information from the original into the template. Save the document as usual once the alterations have taken place. To approve the CV for send-out, double click on the CV in the list to open the following screen:



To approve the candidate's CV select: 'CV has been approved for send-out'

To approve the candidate send-out CV, select 'CV had been approved for send-out'. The CV can not be attached to an e-mail within Eclipse and issued to clients.

7.3 Formatting a Candidate's CV from the Original:

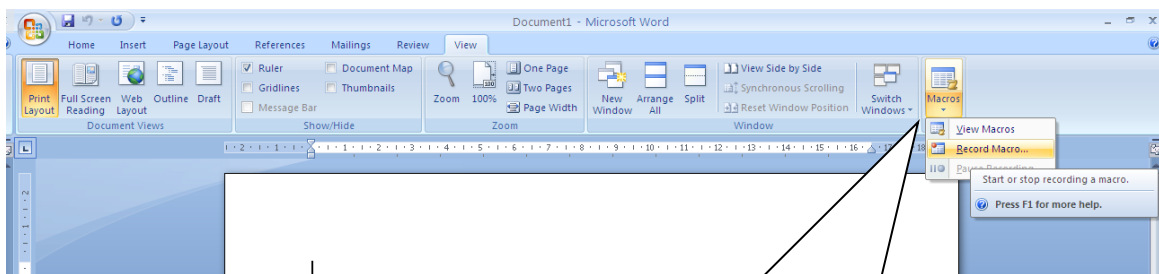
As with the example above, import the candidate's CV into Eclipse. Eclipse will save a copy of the candidate's original CV and a send-out version of the CV. At this point the send-out CV is an exact copy of the original. Open the send-out document and edit as required E.g. remove personal information and insert the company logo etc. Once the relevant alterations have taken place, save the document and 'approve' as described above.

7.4 Creating a Macro:

Where a candidate CV's is to be formatted starting with an exact copy of the original CV, it is common to remove candidate's personal information and insert a company header before approving it for send-out. In this case it may be useful to create the header using a Macro within Microsoft Word.

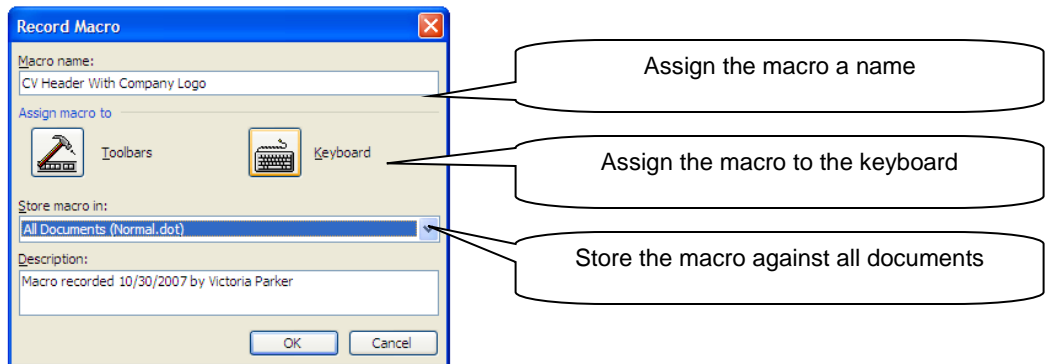
Macros are useful if a task is repeatedly undertaken in the same way e.g. adding a logo to the top of a CV. This process can be automated using a macro. A macro is a series of Word commands and instructions that are grouped together as a single command to accomplish a task automatically, for example routine editing and formatting, in this case inserting a header and company logo into a CV. By creating a macro the header can be inserted into a CV using a single command.

To create a macro, first open Microsoft Word. From the main toolbar at the top of the screen select the 'View' tab and then the 'Record Macro' button as shown below.

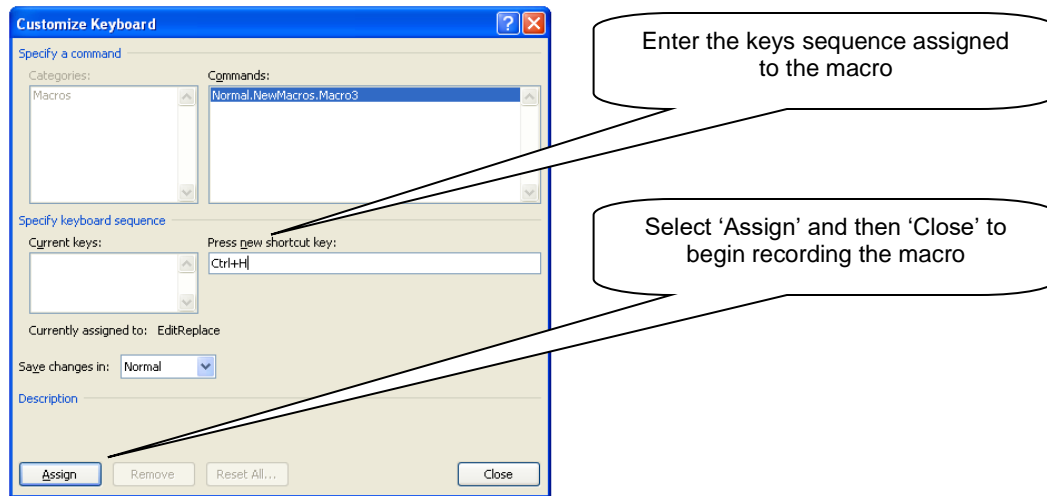


To create a macro, first open Microsoft Word. From the main toolbar at the top of the screen select the 'View' tab and then the 'Record Macro' button.

Before recording the macro, assign the command a name E.g. CV Header. Secondly, select what the macro is to be assigned to, in this example it is the keyboard. Finally, confirm whether the macro is to be assigned to an individual document or apply to all documents. Select 'OK' to save.

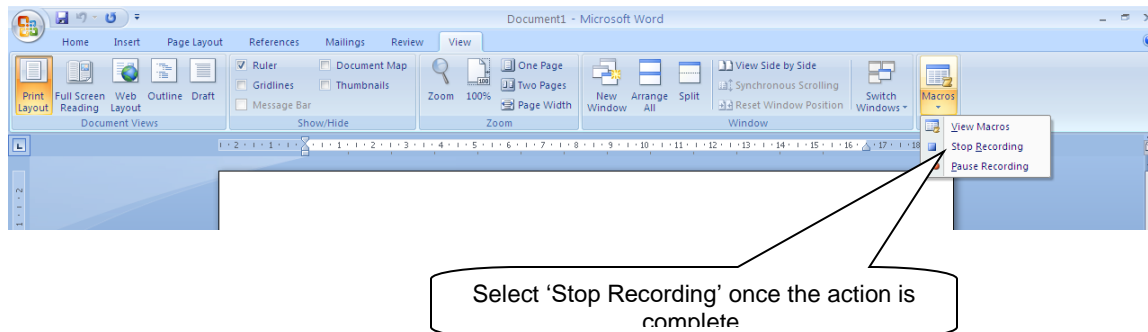


Where a macro is assigned to the 'keyboard', the following window appears. In the field 'Press new shortcut key', enter the key sequence assigned to the macro. In this case it's 'Ctrl' and 'H' pressed together.



Once the information is complete, select 'Assign' and then 'Close' to begin recording the macro. At this point create the header for the CV. The process will be recorded by the Macro.

Word will record the text and / or images inserted into the document from this point. Select 'Stop Recording' (as shown below) once the action is complete.

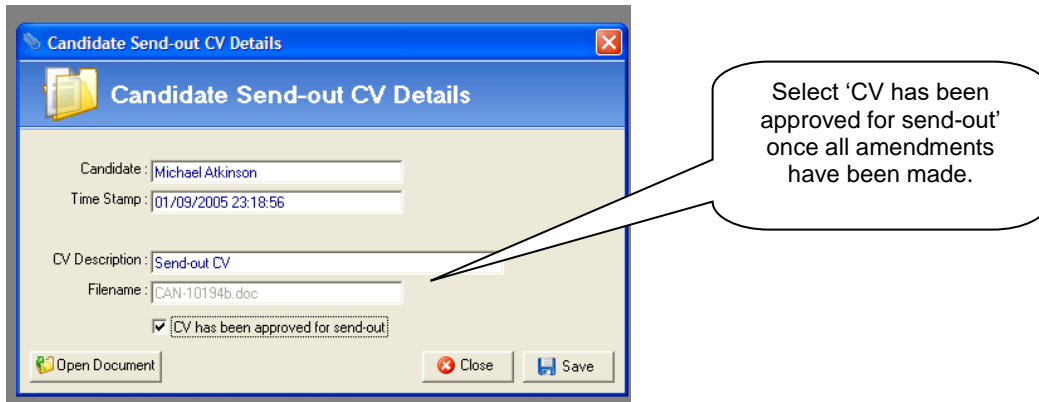


The macro is now complete. As per the above example, selecting 'Ctrl' and 'H' together in any Word document will now insert the header.

7.5 Formatting CV's using a Macro:

To put the macro to use, open the send-out version of a candidate's CV. Remove any personal information as required. As per the above example, simply pressing 'Ctrl' and 'H' together will insert the header into the document. Once all necessary changes have taken place select 'Save' and close.

Once again, to change the status of the newly formatted CV to 'approved' double click on the document to open the following window:



Place a tick in the 'CV has been approved for send-out' box. The CV is now edited and approved ready for send out to clients and potential future employers.

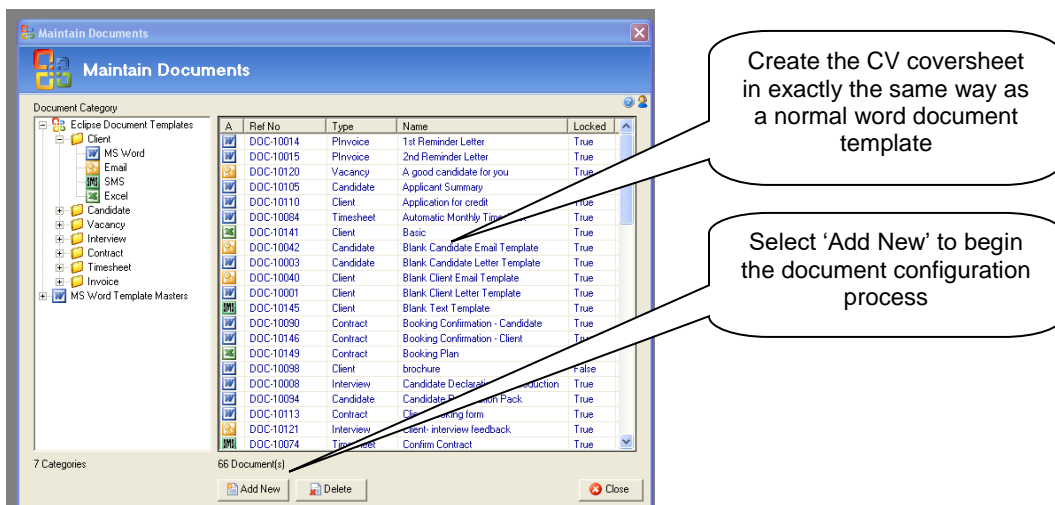
8 Creating a CV Coversheet:

In the instance where CV's are sent to clients by standard mail rather than e-mail, there is a facility in Eclipse to create and output a coversheet from either the client or vacancy records. By following this process in Eclipse a coversheet is outputted but NOT the candidate's CVs. These will need to be printed separately.

The purpose of this feature is to include these CV's in the automatic CV Activity report and the auto shortlist feature. The following explains how to firstly create the coversheet and secondly how to output the coversheet and select the relevant candidates to be updated.

8.1 Creating the Coversheet Document:

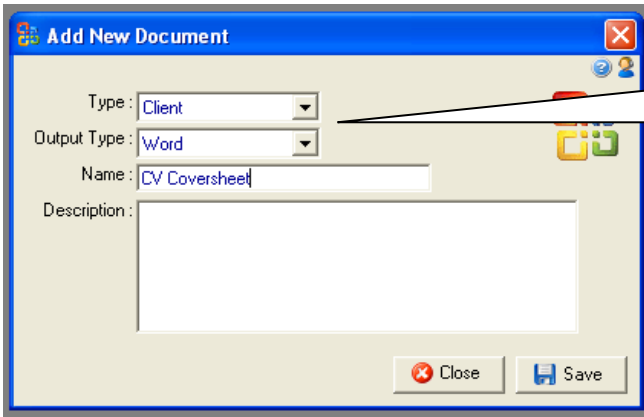
The coversheet itself is created in the same way as any other document template via the 'Document Template' section of the Maintenance Menu. Selecting 'Document Templates' displays the following screen:



Select the 'Add New' button to begin the configuration of the CV Coversheet. As usual select the type and output type, provide a name and a brief description if required.

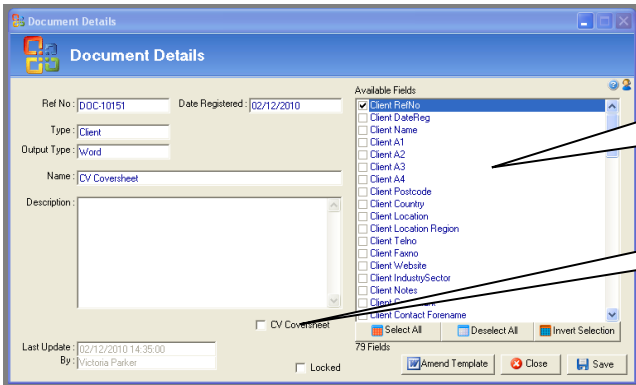
Note:

The template itself can only be outputted from either the client or vacancy records in order for the CV activity and shortlist features to be updated accordingly.



Note:
The template itself can only be outputted from either the client or vacancy records

Select 'Save' to move to the next stage as shown below:
Configure the document template in exactly the same way as a normal word template. The only additional step is to tick the box labelled 'CV Coversheet' as indicated below. Ticking this box will assign the template as the coversheet and activate the additional features.

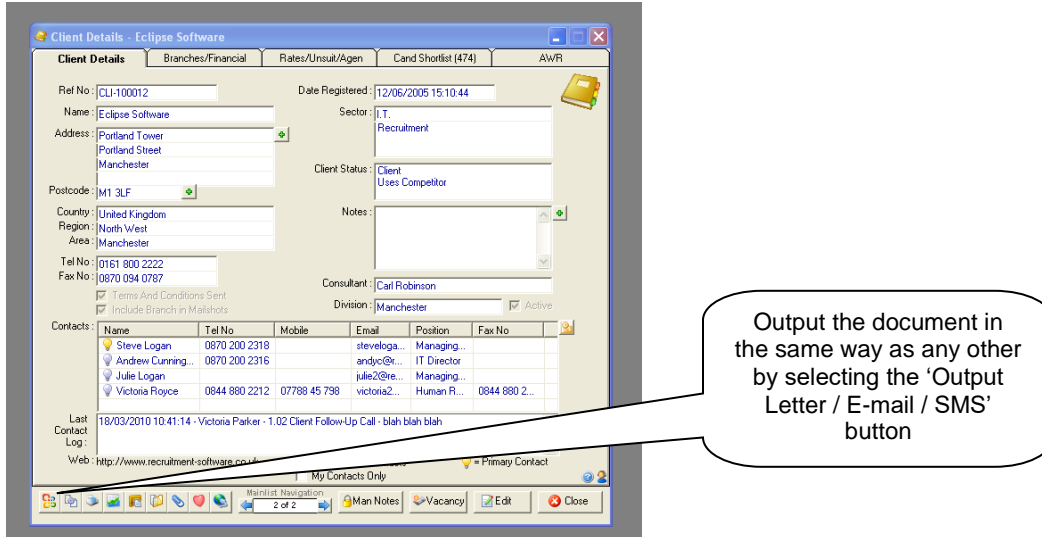


Configure the document template in exactly the same way as a normal document template

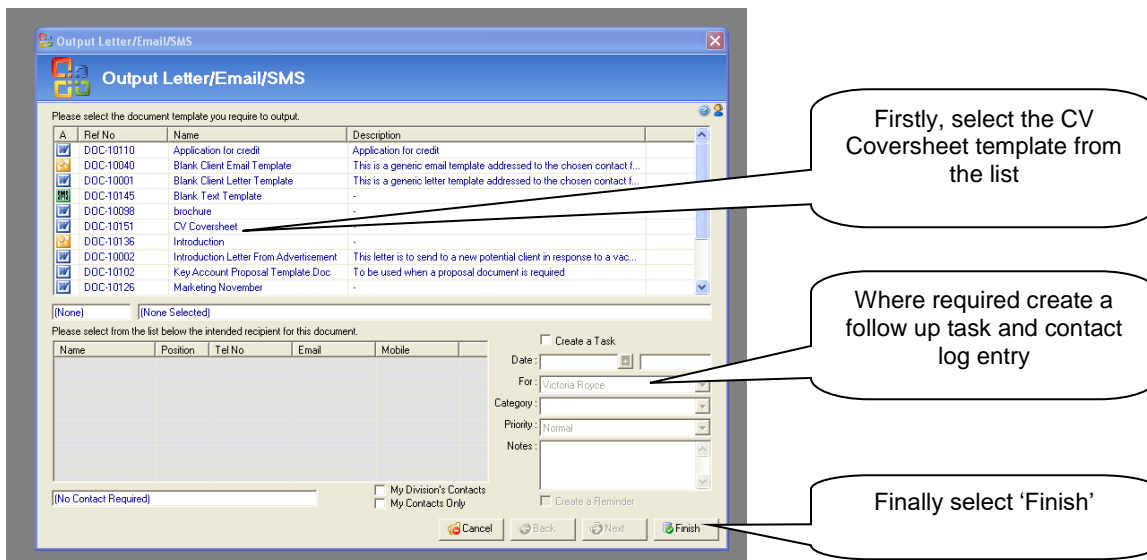
**REMEMBER TO TICK:
'CV COVERSHEET'**

8.2 Outputting the CV Coversheet:

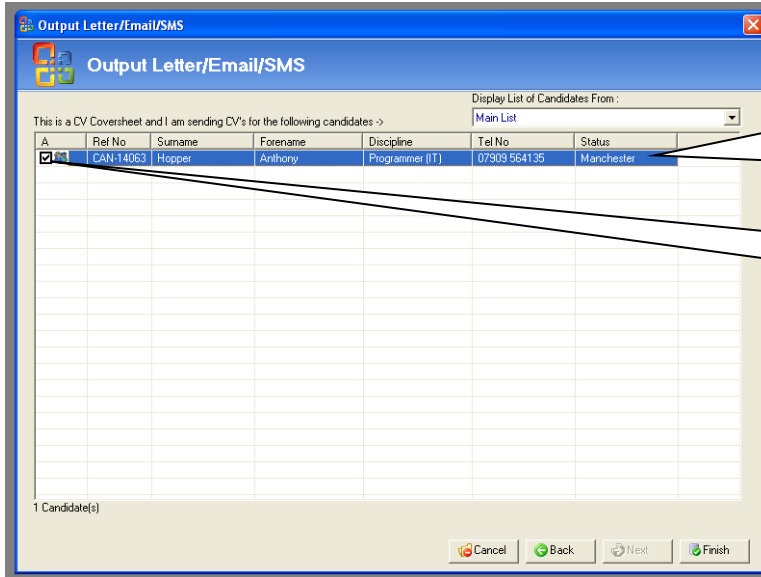
In the example above the CV coversheet template was assigned to the client, therefore the following example shows the output of the coversheet from a client record. Output the document in the same way as any other by selecting the 'Output Letter / E-mail / SMS' button from the bottom of the record as shown below:



The usual Output Letter / E-mail / SMS screen is shown below:



Select the CV Coversheet template from the list and where required create a task and reminder by populating the fields in the bottom right corner. Select 'Next' to display the following window:



The following screen by default displays the list of candidates currently in the main candidate interface

Select the desired candidates by placing a tick in the box on the far left

By default this window will display and candidates currently in the main candidate interface. There is the option to 'display list of candidates from' in the top right corner. Select the option to 'display list of candidates from' in the top right corner. Select the desired candidates by placing a tick in the box on the far left. Select 'Finish', to display the CV coversheet template and complete the automated recording process.

Note:

The candidates selected will be shortlisted and the CV Activity report updated accordingly.

Note:

The candidate's CV's are not automatically attached to the CV Coversheet. The CV's should be printed as usual.

9 Outputting Documents:

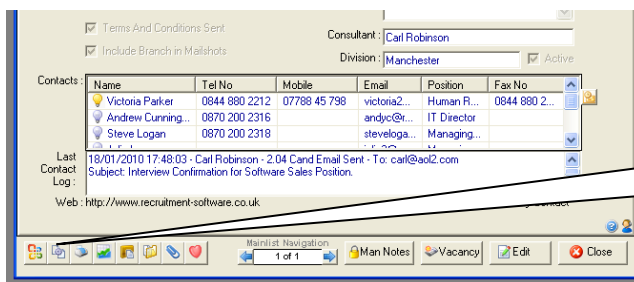
The procedure for outputting documents e.g. letters, e-mails and text messages is the same in all sections of Eclipse. Select the following button from within any Eclipse record. This will open the 'Output Letter / Email / SMS' window as seen below.



This button can be found in the bottom left hand corner of every record in Eclipse.

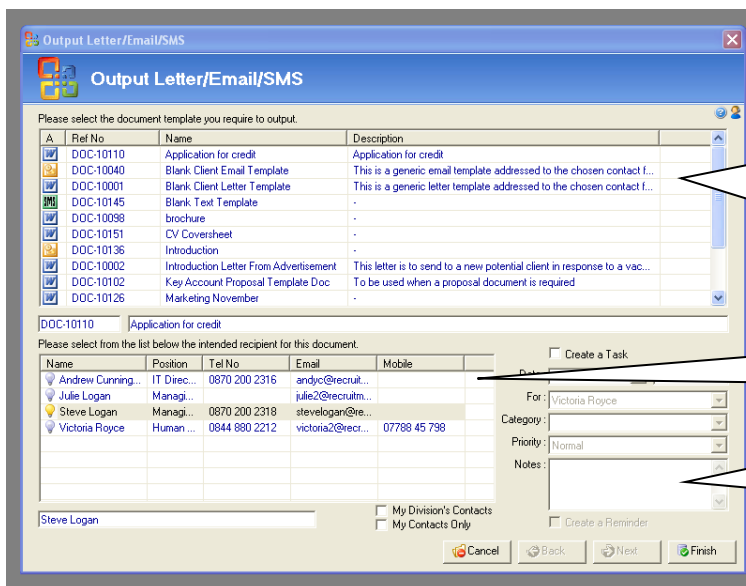
9.1 Outputting a Word Document:

In the following example the 'Output Letter / E-mail / SMS' button was selected from a client record.



Select the 'Output Letter / E-Mail / SMS' button from the foot of the record

The following window displays a list of document templates relating to the particular section open in Eclipse e.g. Client. As discussed earlier, document templates are set up and maintained in the 'Document Templates' section of the Maintenance Menu.



The list of document templates shown in the top section of the window relates specifically to the section of Eclipse the record belongs to. In this example, clients

Once a template is selected a list of potential recipients is displayed

Finally, to create a related task and contact log entry complete the fields in the bottom right corner

The process of sending an e-mail can be broken down into three steps which will now be explained:

Step One:

Select the required document template from the list. The template type is identifiable by the icon on the left:

Step Two:

As this example relates to the client section of Eclipse, there are potentially multiple contacts. Select the desired recipient from the list in the bottom right section of the window. Contacts will only be displayed if the client contact merge field appears in the document template. If not, there is no need to select a contact.

Step Three:

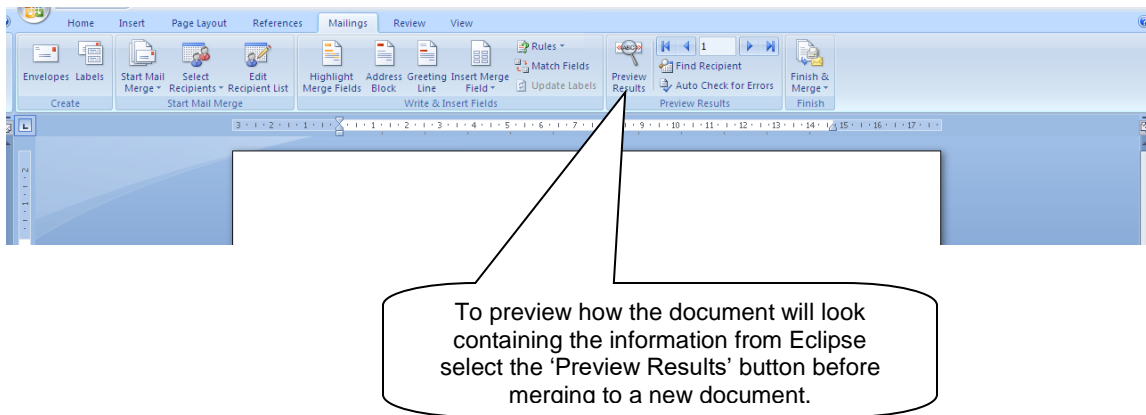
Where required a task and related contact log entry can be created. Simply tick the box labelled 'Create a Task' and fill in the required fields.

To open the desired template, select the 'Finish' button.

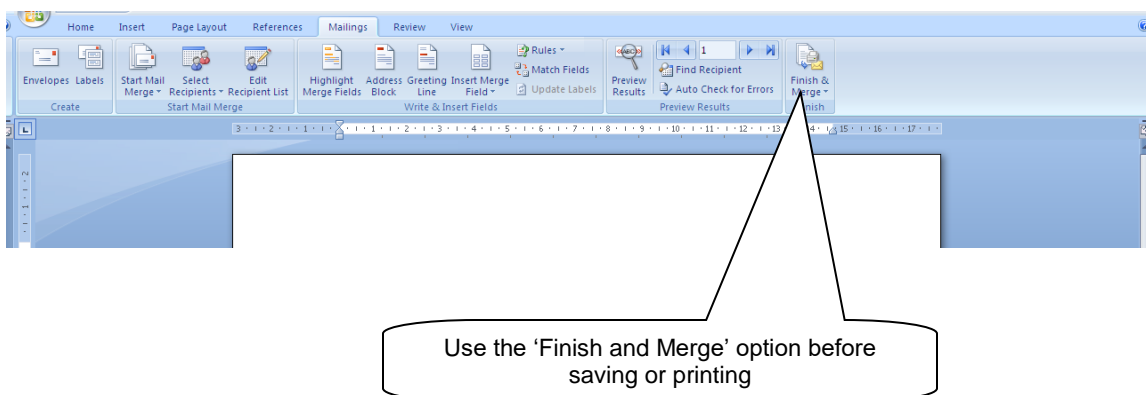
If the template is a Word document, Microsoft Word will launch. The document template will now appear and automatically merge the information from Eclipse.

Note:

To preview how the document will look containing the information from Eclipse select the 'Preview Results' button before merging to a new document.

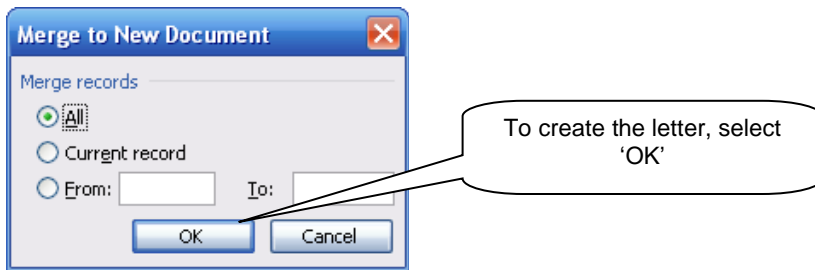


When printing or saving outputted Word documents, ensure to make any changes to the document whilst it is still being viewed as a template, then use the 'Finish and Merge' option before saving or printing.



These buttons are located on the 'Mail Merge' toolbar. Following the procedure outlined above will ensure that any saved documents will contain the merged information rather than a copy of the template.

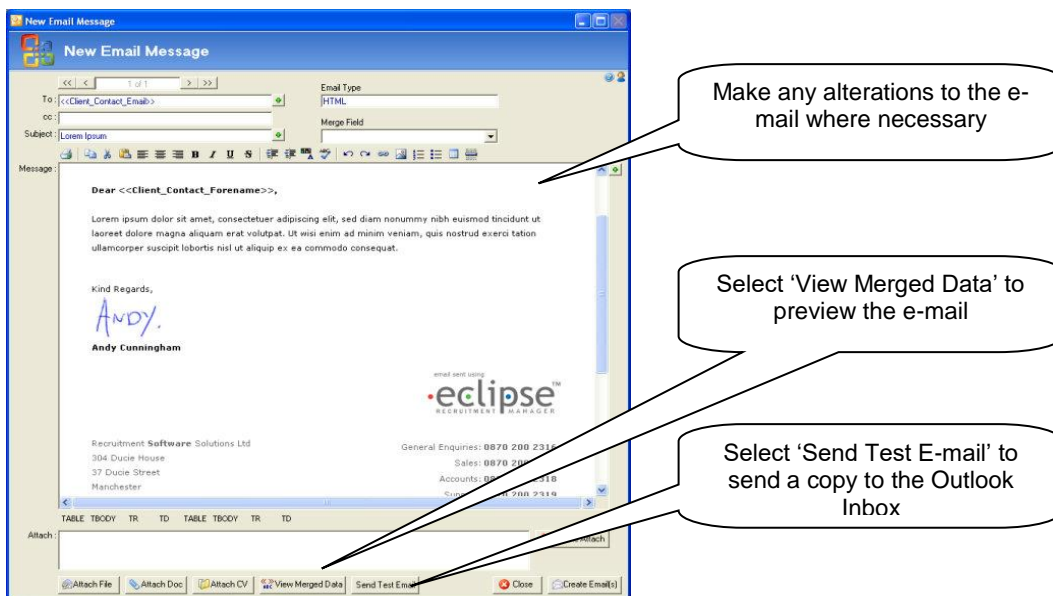
After selecting 'Finish and Merge', Choose 'Edit Individual Documents' The following pop-up box appears:



Save the document as required and attach back into Eclipse if necessary using the lue paperclip icon at the foot of any Eclipse record.

9.2 Outputting an E-mail Document:

If the document to be outputted is an e-mail rather than a Word document, once the recipient has been chosen from the list of client contacts, the email template window will open as seen below. This process will be the same for SMS templates.



Wherever a database field appears in the template E.g. <<Client_Contact_Forename>>, the relevant piece of information from Eclipse will automatically appear in its place when the data is merged. To preview the document select the 'View Merged Data' button. The document becomes 'Read-Only' until it is clicked again.

At this point it is still possible to edit the template either by adding additional text or merge fields. Merge fields can be selected from the drop-down list and simply inserted into the template by clicking the '+' button at the relevant place.

Note:

The editing controls on the toolbar at the top can be used to format the email and perform a spell check etc. This toolbar is only available for templates that have been configured in the HTML format and not plain text. Plain Text e-mail templates can be easily amended to HTML in the Document Templates section of the Maintenance Menu. Please see the 'Document Template Administration' user guide for more information.

To create a test e-mail, select 'Send Test Email'. This creates a preview of exactly how the email will look to the intended recipient and sends it to the users Outlook Inbox.

It is possible to attach a file to an email by selecting the 'Attach File', 'Attach Doc' or 'Attach CV' buttons. These options will be discussed further in the next section.

Once the e-mail is complete select the 'Create Email(s)' button. This will create the email and present the e-mail outbox ready for sending.

Note:

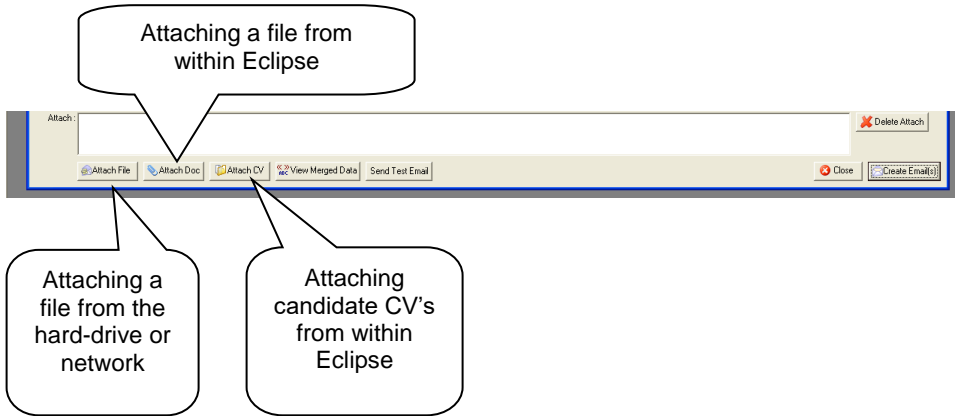
Where Individual consultant signatures have been configured in the User Administration section of the 'Maintenance Menu', they will appear at the bottom of the e-mail when the data is merged.

10 Attaching Documents, Files and CV's to an E-mail:

There are three options for attaching files to emails. There is a button for each option:

- Attach Doc
- Attach File
- Attach CV

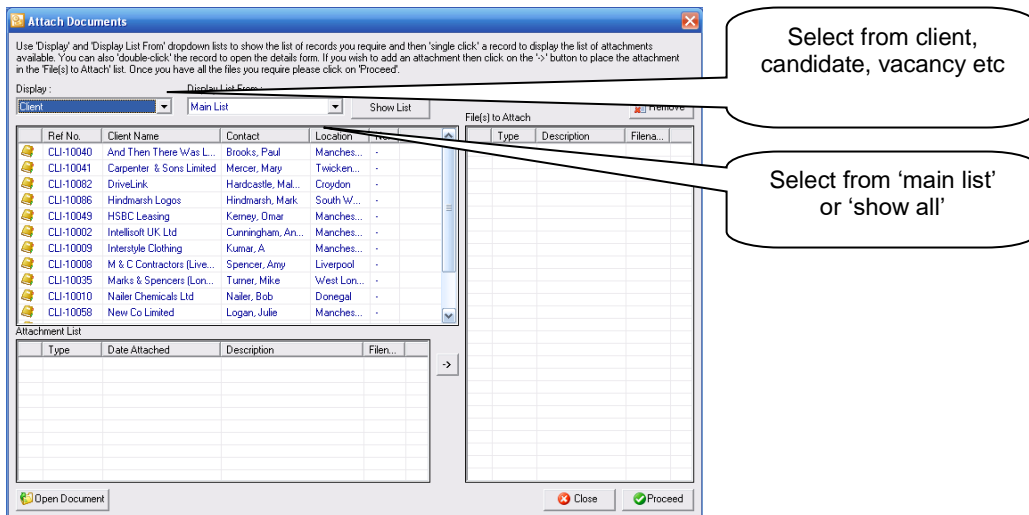
The image below highlights the buttons used for each action:



10.1 Attaching a Document to an E-mail:

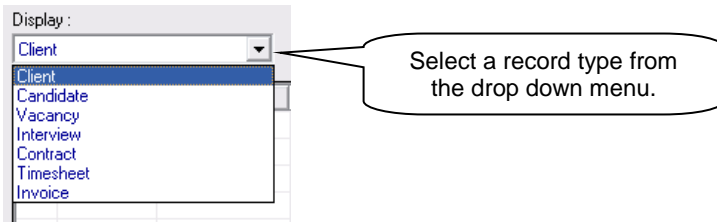
This section demonstrates the process of attaching a document already stored in Eclipse, to an e-mail. Examples include: copies of terms and conditions, directions to an interview location, job specifications, timesheets or anything that is attached to a record in Eclipse.

As per the above image, the **'Attach Doc'** button is found second from left at the bottom of an e-mail window. This button opens the following window and will allow the attachment of a document that is already stored within a record in Eclipse.

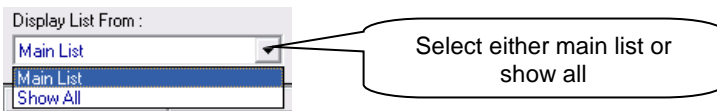


When the 'Attach Doc' button is first selected, the window in the top left corner will be empty. The first step is to select whether you want to attach a file from a Client, Candidate, Vacancy record etc. This is achieved by choosing a record type from the 'Display' drop-down menu as shown below.

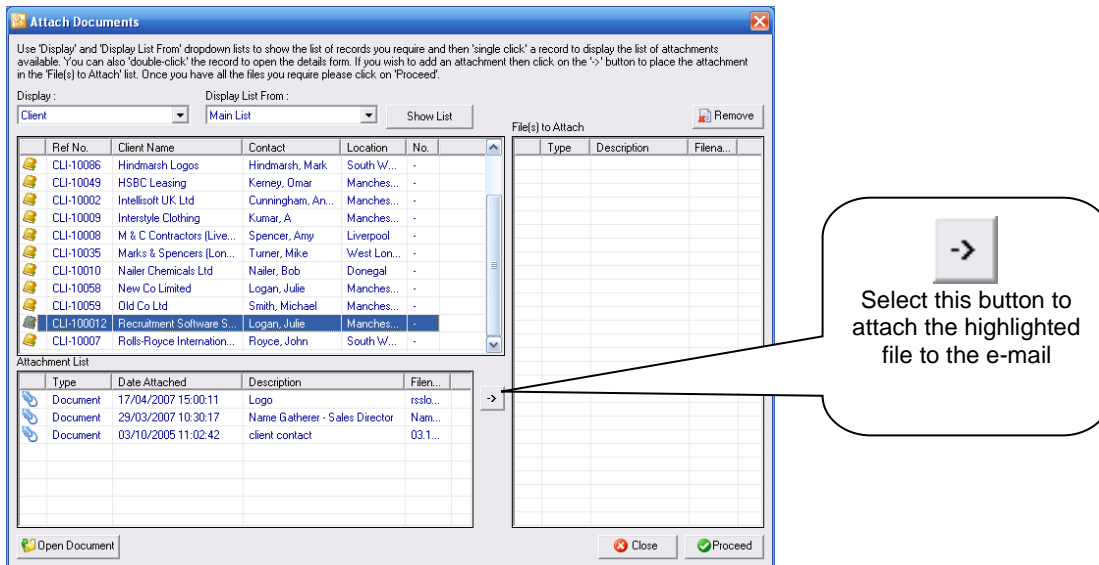
In this example, the document that is to be attached to the e-mail is currently saved in a Client record. Therefore client is selected from the drop-down list.



Use the next option to either display the list of clients that currently appear in the main client interface (usually the results of a search) or show the complete list of clients in the entire database.



Once the relevant options have been chosen, select 'Show List'. The results will appear in the top left hand list in the window as shown above. As per the example below, select the desired client from the list. A list of attachments connected to this record will appear in the bottom section of the window. To view a file, simply highlight it and select 'Open Document' or if preferred, like elsewhere in Eclipse, just double click on it.



To attach the selected file to the email, first highlight it and then click the arrow button shown above. The selected file will now appear in the list of 'Files to Attach' on the right hand side of the screen. Repeat this process until all the desired files have been attached.

To remove a document from the 'Files to Attach' list, simply highlight it and select 'Remove'. When you have selected the desired documents, click proceed to attach them to the email.

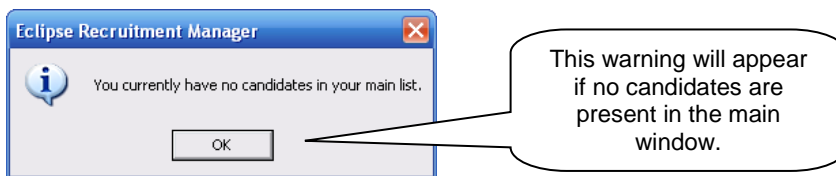
10.2 Attaching a File to an Email Template:

Selecting the 'Attach File' button activates the normal Microsoft Windows file manager box. From here search for and attach any file from the hard drive or network. This works in the same way as any normal email attachment.

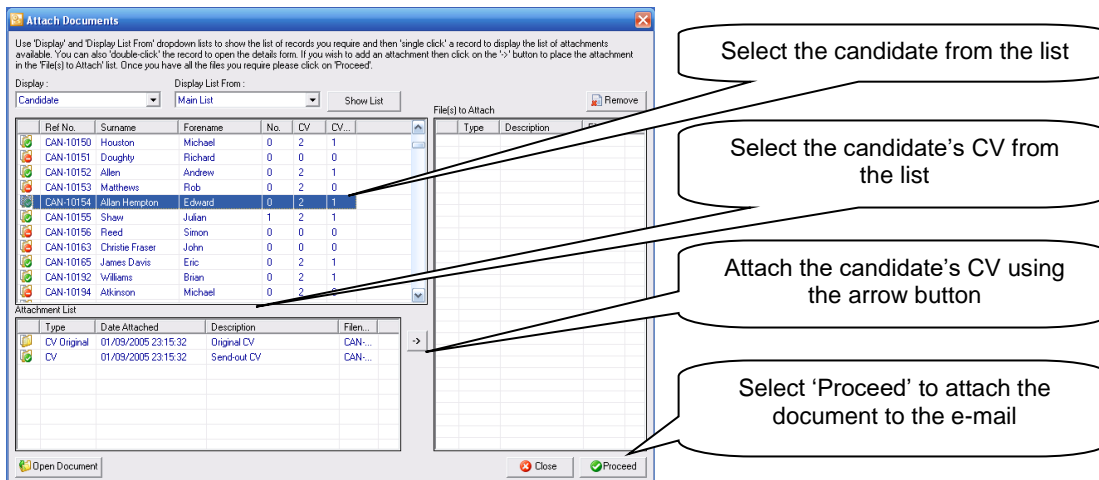
10.3 Attaching a CV to an Email Template:

Attaching a CV is achieved in exactly the same way as attaching a document. The example that follows assumes that a shortlist of candidates has been prepared and transferred to the main candidate interface.

Select the 'Attach CV' button to activate the same window pictured above in the attach document example. Eclipse will automatically display the list of candidates shown in the Main candidate interface. Where there are no candidates present in the main candidate interface, the following message will appear.



If this warning appears, to locate the desired candidates either select 'Show All' from the 'Display List From' drop-down and then select 'Show List' or return to the main candidate window, search for the required candidates and then re-select 'Show List'.

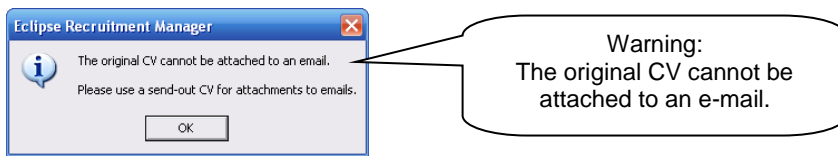


Once the desired list of candidates appear in the section at the top, select a candidate by highlighting them in the list. A list of documents, including CV's attached to the candidate record will appear in the lower list.

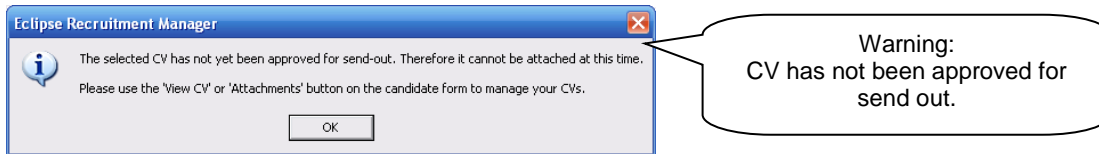
In the image above, some of the candidates have a red 'no-entry' icon next to their name. This signifies that their CV has not been edited and approved for send out. A green 'tick' indicates that the candidate's CV has been approved. If there is no icon next to the Candidate's name, there is no CV attached to the candidate record.

To attach a CV firstly highlight the desired CV in the list and select the arrow button. The name of the document will appear in the 'Files to Attach' section on the right. When all the desired documents have been attached, select 'Proceed'. The CVs will now be attached to the email. When the email is sent, a record will be added to the CV Activity for the Candidate, Client and Vacancy if applicable.

Where an attempt is made to attach a candidate's 'Original CV', Eclipse will prevent the file from being attached and present the following warning.



Similarly, where an attempt is made to attach a CV that has not yet been approved for send-out the following warning will appear.

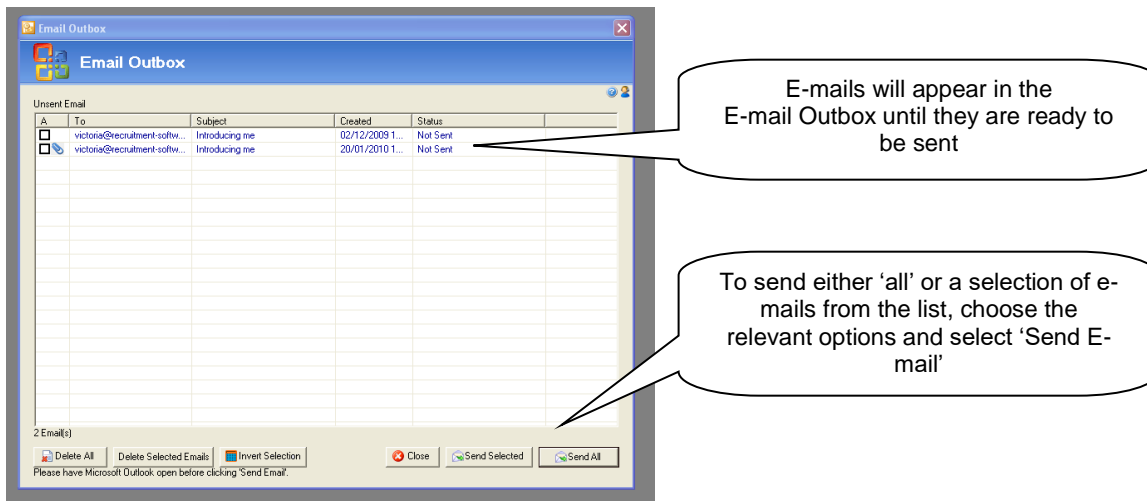


Note:

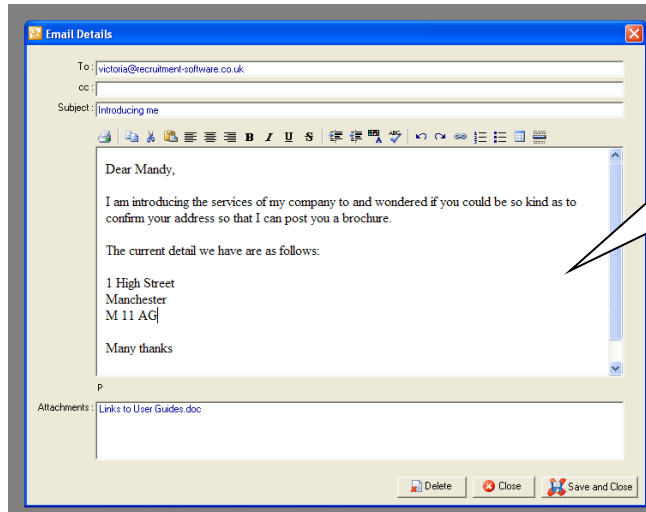
When emailing a candidate's CV to a client with reference to a specific Vacancy, it is beneficial to send the e-mail and attached CV via the vacancy record rather than from the Client. This will ensure that the 'CV Activity' record also appears linked to the Vacancy.

11 Sending the Email to the Outbox:

Once an email is ready to be sent with any necessary attachments, simply select 'Create Email'. The e-mail will be sent to the email outbox in Eclipse ready for sending via Outlook.



This is the last opportunity to edit or delete an e-mail before sending. To make amendments to an e-mail at this point, simply double-click to open as shown below:



Once you are happy with any amendments to your e-mail, select either:
'Save and Send'
OR
'Save and Close'

Once any amendments have been made, select 'Save and Close' to return to the e-mail outbox. To send all the e-mails in the Outbox, simply select the 'Send All' option. To send selected e-mails in the list tick the corresponding box in the list and select 'Send Selected'. E-mail can be deleted in the same way.

Note:

The Email Outbox works in exactly the same way as the SMS Outbox, both of which can also be accessed from the 'Tools' option on the Menu bar, or by pressing 'CTRL+E' or 'CTRL+S' respectively.

Note:

Ensure that Microsoft Outlook is open before sending e-mails from Eclipse. Any replies will appear in the Outlook Inbox.

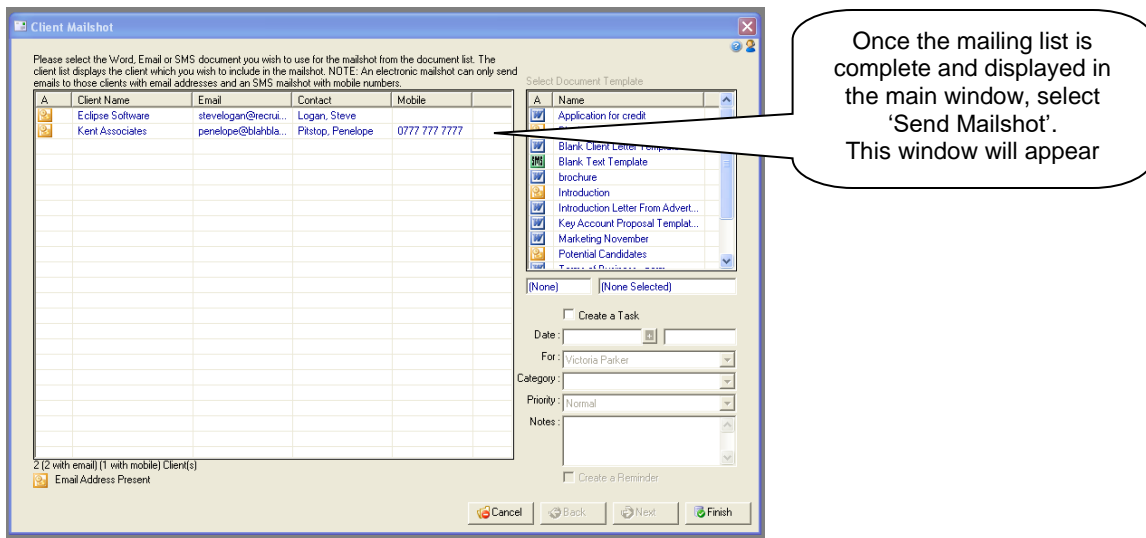
12 Mail Shots:

The basis of the mail shot facility in Eclipse is very similar to outputting a single document, the difference here is that rather than sending a letter, email or SMS message to only one recipient, tens, hundreds or even thousands of recipients can receive individually addressed copies of the same piece of correspondence in one single operation.

Note:

This is an excellent facility for sending out candidate's CV to multiple clients. Therefore, for the purpose of this example, the mail shot recipients are clients.

The first stage is to generate the mailing list. This is performed using the Search Results List in the main window and can be generated using a combination of saved lists, searching and filtering of results. Once the mailing list is complete and displayed in the main window, select 'Send Mailshot' and the following window appears:



This window is split into two halves. The section on the left shows the recipient list and identifies those recipients with e-mail addresses saved in Eclipse. The total number is shown in the bottom left hand corner.

Note:

In instances where clients have been excluded from mail shots within their record, Eclipse will remove them from the list at this point. This works in exactly the same way for candidates.

The list on the right shows the document templates that can be outputted from this section. To proceed with the mail shot, simply select the desired template and click 'Finish' or double click on the template in the list.

This will open the relevant Letter Template in Microsoft Word or open the 'Edit Email / SMS' window. Operation from here is exactly as described earlier in the guide with the exception that with the mail shot, it is possible to navigate through all of the recipients in the <<ABC>> preview mode prior to sending or printing by using the record navigation buttons on the Word Mail Merge Toolbar and on the Email window.

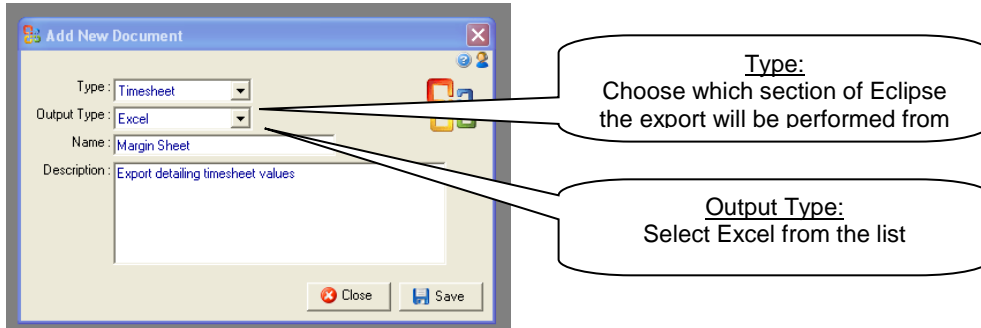
Finally, there is the option to create a task and contact log entry for each client included in the mail shot. Tick the box labelled 'Create a Task'. Additionally, choose a category for the related contact log entry and add any additional notes as required. Click 'Finish' to create the mail shot.

Note:

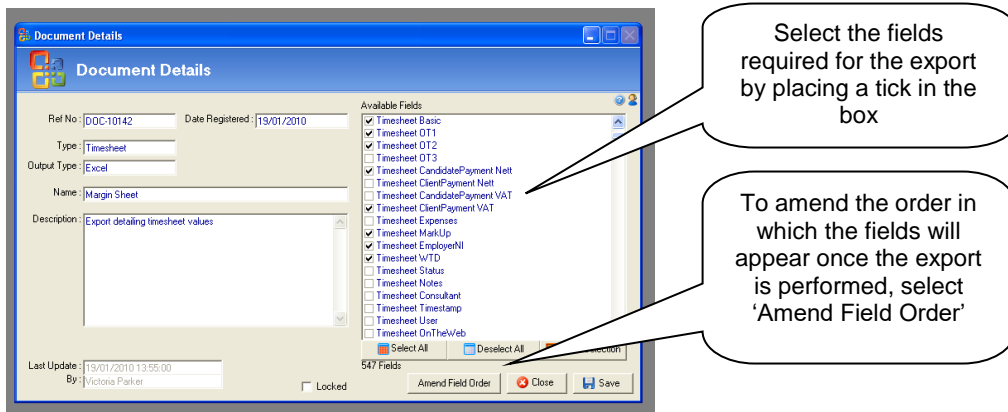
If you are sending to a large number of recipients, Eclipse may slow down when sending the emails.

13 Creating a New Excel Export Template:

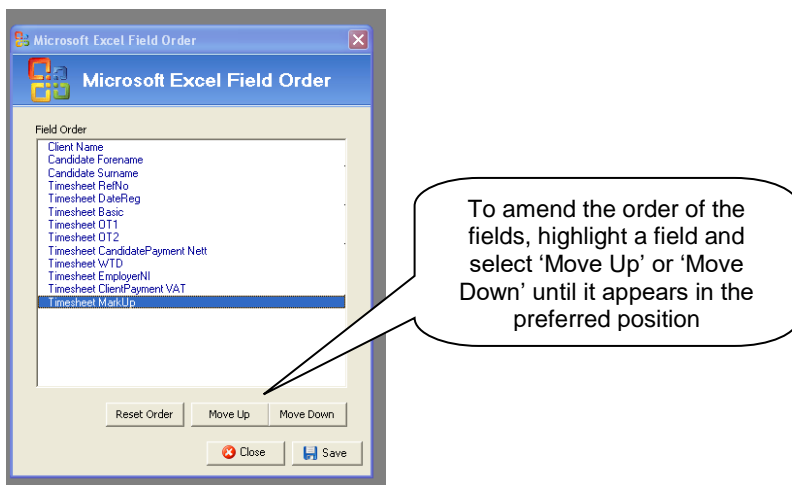
It is possible to export almost any field of information from Eclipse into an excel spreadsheet. Templates for such exports are configured in much the same way other document templates. Select 'Add New' from the main document screen as complete the type, output type, name and description fields as shown below:



Selecting 'Save' opens the document details screen as pictured below. Choose the fields required for the export by placing a tick in the corresponding box on the right hand side of the available fields section.

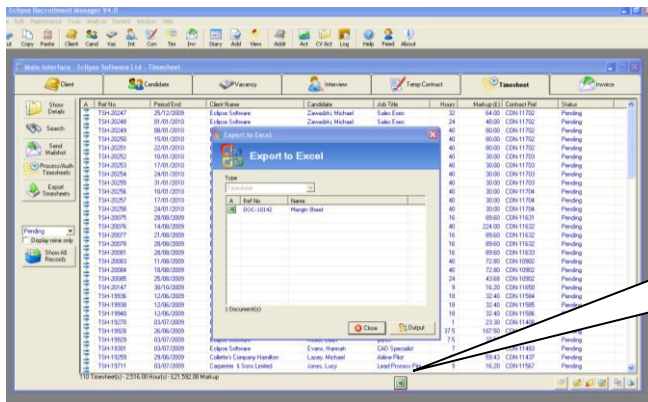


To amend the order in which the fields will appear when the export is performed, select the 'Amend Field Order' button at the bottom of the screen. The following window will appear:



To amend the order of the fields, highlight a field and select 'Move Up' or 'Move Down' until it appears in the

preferred position. Once the order is complete, select 'Save'. The excel export can now be outputted from the relevant section of the main interface as shown below:



Select the 'Excel' icon at the foot of the window. Select the desired template and 'Output' the document.

To perform the Excel export firstly navigate to the desired section of the main interface, in this instance the timesheet tab. Select the 'Excel' icon at the foot of the window as shown above. A window displaying any pre-configured formats will be shown. Select the desired export and click 'Output'. The excel spreadsheet will be displayed where any alterations can be made using the standard Excel features.