



MAILING LISTS

MANUAL



OTYS Recruiting Technology



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1 | INTRODUCTION

1.1 ABOUT MAILING LISTS

If you want to send a newsletter or an email to a group of people, you can use a mailing list. A mailing list is a list of recipients with whom you can communicate with one batch email. Newsletters and emails sent to a mailing list are sent as individual emails: if you send an email to a mailing list of 100 recipients, 100 separate emails are sent. This has several advantages:

- The recipients do not see each other's email addresses (all of us have received emails where a group of recipients was accidentally placed in the 'CC' field instead of the 'BCC' field).
- As you are sending individual emails, there is a smaller chance of the email ending up in a spam folder.
- You can add a personal salutation if you wish to.

1.2 PURPOSE OF THIS MANUAL

In this manual we explain how to use mailing lists within your process. Both how you can manage mailing lists with the module and how you can use mailing lists in other processes (e.g. when searching for candidates).

1.3 STRUCTURE OF MANUAL

This manual starts with an introduction chapter that explains the added value of the mailing lists in OTYS Go!. Then it discusses the features of the module.

A distinction is made between:

- Basic functions of the Mailing List Module
- Managing mailing lists in the Mailing List Module
- Integration of mailing lists in other modules

2 | BASIC FUNCTIONS

2.1 SEARCH AND FILTER

If you frequently use mailing lists, you can use the advanced filter and search function of OTYS Go!. You can find the search function in the right-hand panel of your screen. Here you can add multiple criteria to find the right search result. If you want to use this combination of search criteria more often, you can save the search as a filter. The filter can then be found in the left-hand panel of your screen, so that you can carry out your saved search with a single click at a later time. Instructions on how to best use these functions are given in the manual 'Lists, Searches and Matching in Go!'. We have chosen to describe this functionality in a separate manual, because the instructions are the same for multiple OTYS Go! modules.

2.2 EDIT YOUR LIST VIEW

Do you often work with the Mailing List Module and do you want to edit the columns in the overview? You can do this by clicking on 'Standard view' at the bottom of your screen. Here you can add, delete and change the order of columns. You simply save your new view so you can use it any time. Instructions on the best way to use this function are given in the manual 'Lists, Searches and Matching in Go!'.

2.3 CREATE NEW MAILING LIST

To create a new mailing list in the Mailing List Module, click on the 'Add mailing list' icon at the top. A new mailing list opens immediately. The next chapter described the follow-up actions you can perform with this new mailing list.



Fig. 1 – Create mailing lists

3 | MANAGE MAILING LISTS

3.1 EDIT BASIC DETAILS

In the 'Mailing list information' widget in the top left corner of the mailing list, you will see the basic details of the mailing list. You can change this information by clicking on the 'Edit' icon in the top right corner of the widget. You can change the following fields:

- Name
Here you add an (internal) name for the mailing list.
- Description
Here you add an (internal) description for the mailing list. For example, you can use this field if you periodically update your mailing lists, so you know when you last performed this action.
- Subject
If you decide to publish newsletters on your website, these will be subdivided on your website per mailing list. If you decide to use this mailing list for website publication, enter the (external) name of the mailing list here. For example, if you have a mailing list with the name 'Mailing list for active candidates' which you would like to use for newsletter publication, you can use 'News for candidates' as a subject.
- Category
Here you can select a category if you frequently use mailing lists and want to subdivide them.
- Automatically add new candidates
If you check this box, new candidates who register via the website are automatically added to this mailing list.
- Publication
If you decide to publish newsletters on your website, these will be subdivided on your website per mailing list. Check this to publish this mailing list on your website.
- Publish on websites
If you decide to publish newsletters on your website, these will be subdivided on your website per mailing list. This option allows you to determine on which websites this mailing list should be published.

After you have made your changes, click on the 'Save' icon in the top right corner of the widget to save your changes.

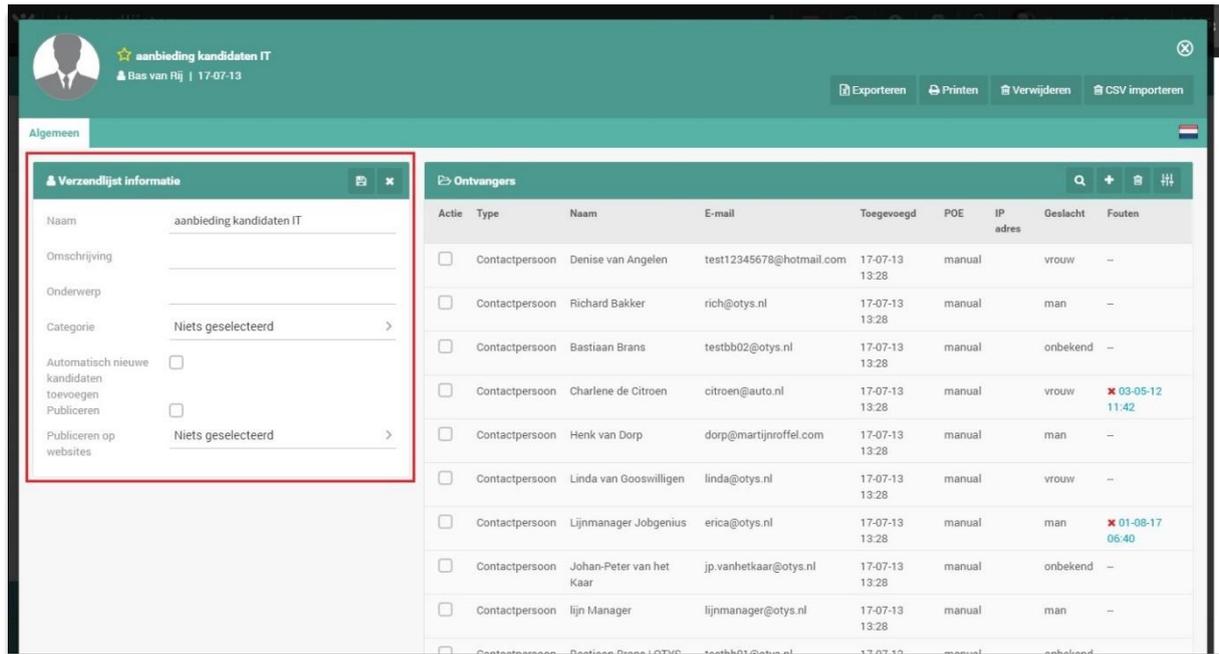


Fig. 2 – Edit basic details of a mailing list

3.2 VIEW RECIPIENTS

In the 'Recipients' widget in the top right corner of the mailing list, you will see a list of recipients who make up the mailing list. You can activate (or deactivate) a filter via the 'Show/hide filters' icon in the top right corner of the widget. You can use this filter to search for specific recipients. Go to the selection list on the left side, where, for example, you can specify that you only want to see candidates in the list. You can search for a specific name or email address using the keyword filter on the right side. This allows you to check whether someone is already on the mailing list. Clicking on a recipient (if available) opens up the recipient's details. For example, if you click on a candidate, the relevant candidate details are opened.

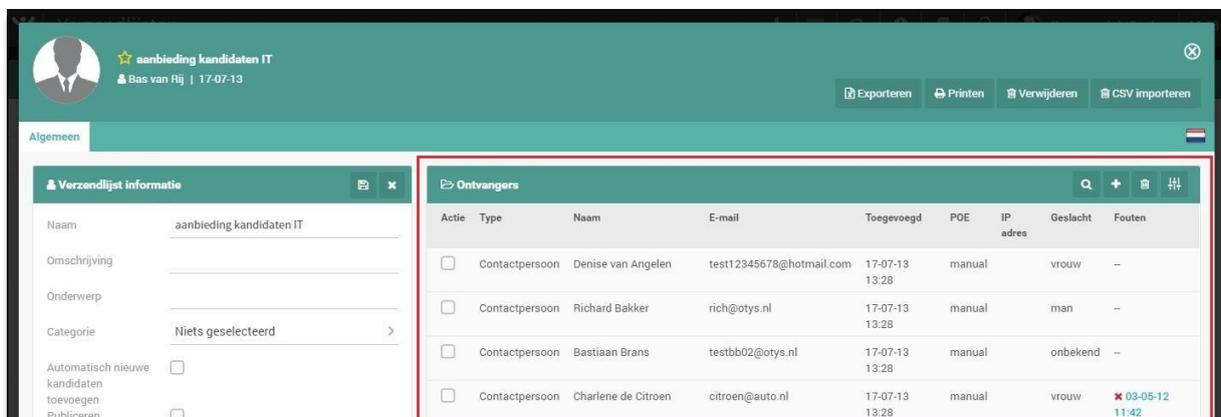


Fig. 3 – View recipients

3.3 ADD RECIPIENTS FROM DATABASE

To add a recipient already in the database, click on the 'Add recipients from database' icon in the top right corner of the 'Recipients' widget. A new window will open. At the top left, you can enter keywords in this window (e.g. the name of the recipient). At the top right you can specify which entity should be searched (e.g. 'Candidates').



Fig. 4 – Add participants from your database

Once the system has found one or more recipients, they appear in the list on the left side of your screen. By clicking on a recipient on the left you select this recipient and they are moved to the right side of your screen. You can perform this action several times. Once you have finished adding recipients, click on the 'Select' button at the bottom right of your screen. This will take you back to the mailing list and the selected recipients will have been added to the mailing list.

So via this route you can add specific recipients to a mailing list. In Chapter 4 we explain how you can add recipients from the search results of different modules, so that when you search for candidates, for example, you can add a group of candidates at once.

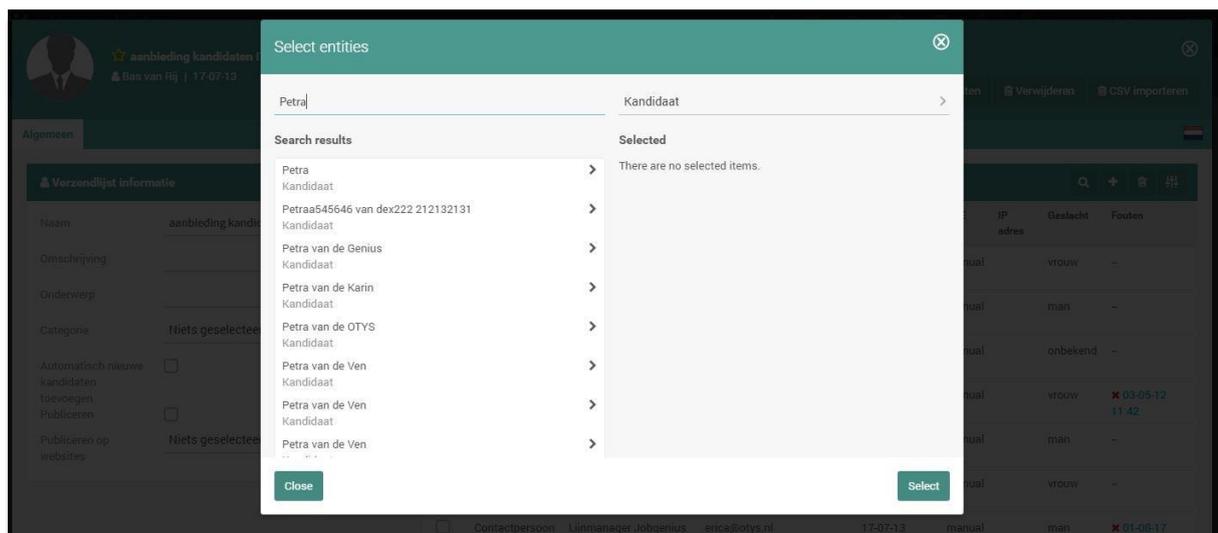


Fig. 5 – Search for the right recipient in the database

3.4 ADD RECIPIENTS MANUALLY

It is also possible to add recipients that are not in your database. Click on the 'Add recipients manually' icon in the top right corner of the 'Recipients' widget. A new window opens where you can add the recipient's details. Once you have filled in the details, click on the 'Save' button at the bottom right of your screen. This will take you back to the mailing list and the selected recipients will have been added to the mailing list.

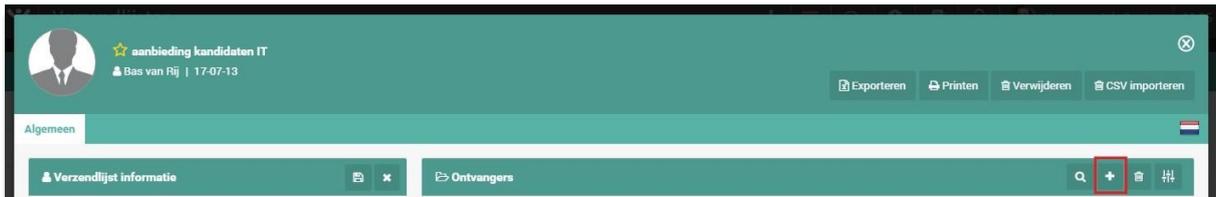


Fig. 6 – Manually add recipients to a mailing list

3.5 DELETE SPECIFIC RECIPIENTS

To remove specific recipients from the mailing list, select in the 'Recipients' widget the recipient(s) you want to delete from the mailing list. After selecting, right-click on one of the selected recipients and select 'Delete'.

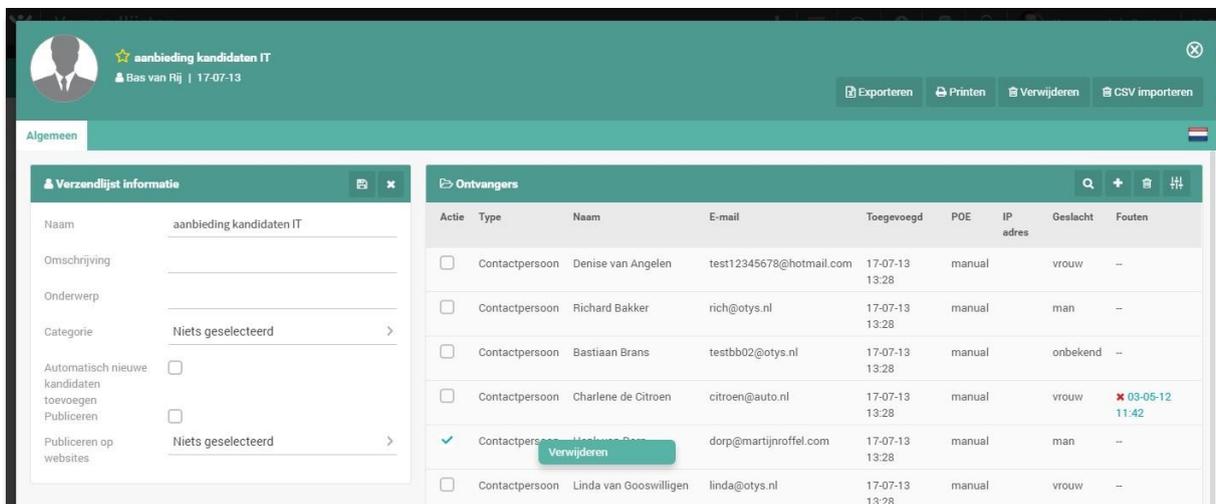


Fig. 7 – Delete recipient from the mailing list

3.6 DELETE ALL RECIPIENTS

It is also possible to delete all recipients from a mailing list at once. Click on the 'Delete all recipients' icon in the top right corner of the 'Recipients' widget. A window will now open in which your explicit approval is asked for this action. Once you have confirmed, all recipients will be deleted from the mailing list and your list will be empty.



Fig. 8 – Delete all recipients

3.7 DELETE ERROR MESSAGES

The system automatically tracks whether error messages are received in response to emails you send to mailing lists. In the 'Recipients' widget in the mailing list you will see for each recipient whether there have been any errors and when the last error occurred. This allows you to check whether the email address for that recipient is correct. Clicking on an error allows you to delete these errors, for example, after a recipient informs you there was a temporary problem with their email address.

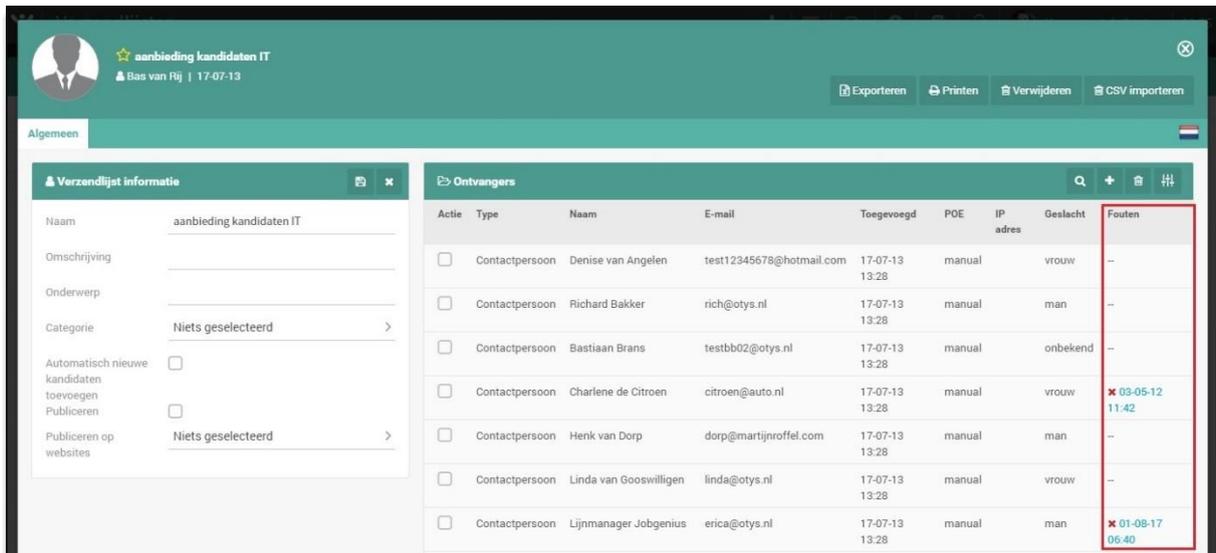


Fig. 9 – Check mailing list for errors

3.8 IMPORT RECIPIENTS

It is also possible to import recipients into an existing mailing list. This allows you to import a list of email addresses from another source into your OTYS Go! system, so you can send a newsletter or email to this group of recipients.

To import recipients into a mailing list, you first need to prepare a file in the correct format. To do this, open the list that you have in a spreadsheet program (e.g. Microsoft Excel) and take the following steps:

- In a spreadsheet, place the list of all email addresses and related details. This should be done in the following order:
 - Column A: Email address
 - Column B: Gender (M for male, F for female)
 - Column C: Initials
 - Column D: Last name
 - Column E: First Name
 - Column F: Middle name
 - Column G: Name of person to whom the email should be addressed (e.g. First name Middle name Last name)
- You can start in the first row with the first email address. You can also place headers in the first row and start the first email address in the second row.
- If you do not fill in certain columns, the other data of that email address will be imported. It goes without saying that Column A (email address) is essential.
- Make sure you save the import file as a CSV file (not as an Excel file).

Once you have created this file you can go to the mailing list in OTYS Go! and click on the 'Import CSV' button in the top right corner. You can drag the created file to the field at the top right-hand side or click on the 'Upload file' button and select the file.

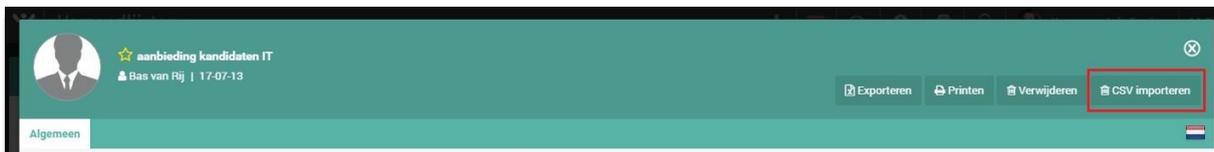


Fig. 10 – Import a mailing list from a CSV file

Once you have selecting a file, you will see an example of the details to be imported, with only the first rows of your file being displayed.

You can change the settings of the file in the top left corner:

- File has column names row
If the top row of your file contains the column names, check this option. The top row will then not be imported.
- Separator sign
Here, you specify what separator sign is used between the different fields. This depends on how your file is composed.

- Text indicator

Here, you specify whether there is a special indicator for text (e.g. that all text is between double quotation marks). This depends on how your file is composed.

If you change the above settings, the example below will be adjusted immediately. This will help you make the right settings. Once you have finished this action, click on the 'Import' button at the bottom right. The recipients have now been added to the mailing list.

If you have imported a wrong file of recipients in a certain mailing list or if something went wrong when importing, you can undo the import. Click on the 'Import CSV' button in the top right corner of the mailing list again. On the right side you will then see the imports that have already been made for this mailing list. By clicking on the 'Delete' icon next to the relevant import and confirming this, the imported recipients are removed from the mailing list.

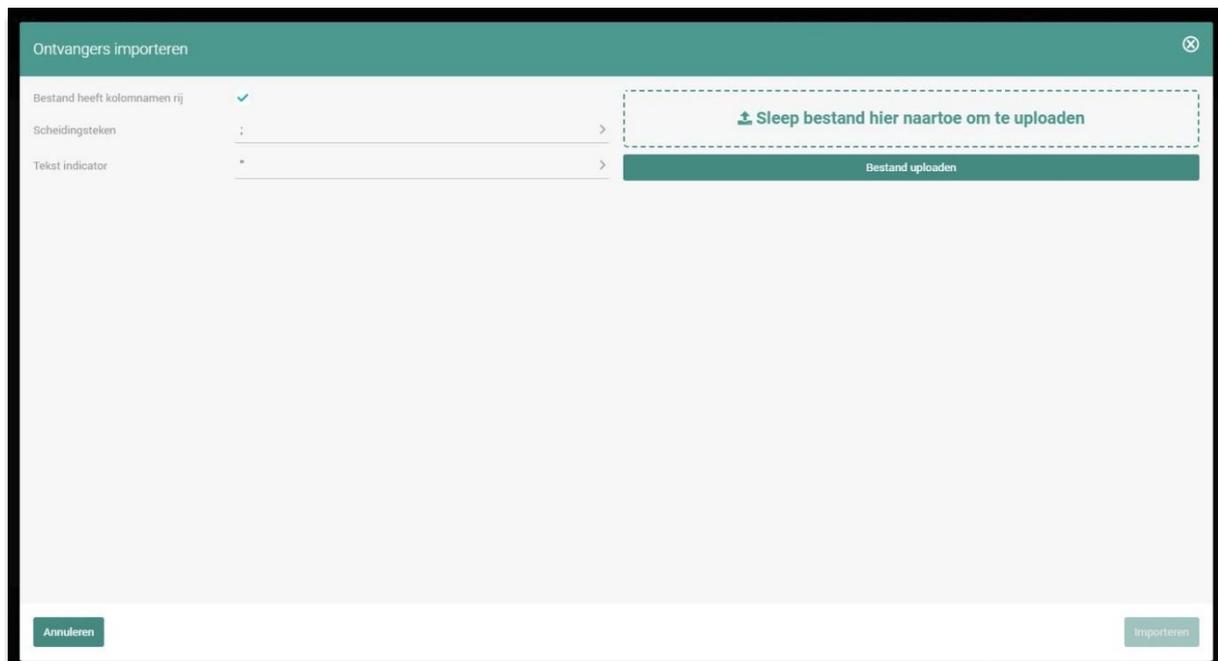


Fig. 11 – Configure import file

3.9 EXPORT MAILING LIST

It is also possible to export a mailing list in XLS format. This allows you to download a file with recipients and, for example, load it into an external program. To do this, click on the 'XLS export' button in the top right corner. A file will then be downloaded with the mailing list recipients.

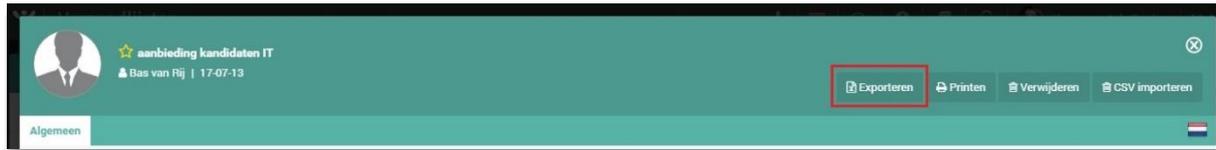


Fig. 12 – Export a mailing list to XLS format

3.10 PRINT MAILING LIST

It is also possible to print a mailing list. To do this, click on the 'Print' button in the top right corner. A PDF file will be downloaded containing the mailing list recipients which you can then print.

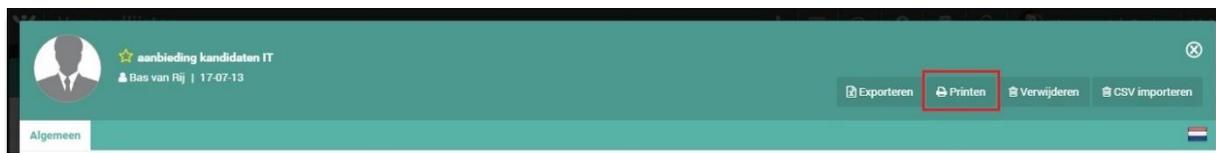


Fig. 13 – Print a mailing list

3.11 DELETE MAILING LIST

If you want to delete a mailing list entirely, click on the 'Delete' button in the top right corner of the mailing list. You will be asked for confirmation. After you confirm this action, the mailing list will be deleted.



Fig. 14 – Delete mailing list

4 | INTEGRATION IN OTHER MODULES

4.1 ADD CANDIDATES TO MAILING LIST

In your Candidate Module you can search for candidates with the advanced search filters. Once you have made a selection of candidates, you can select these candidates and add them to a mailing list at once.

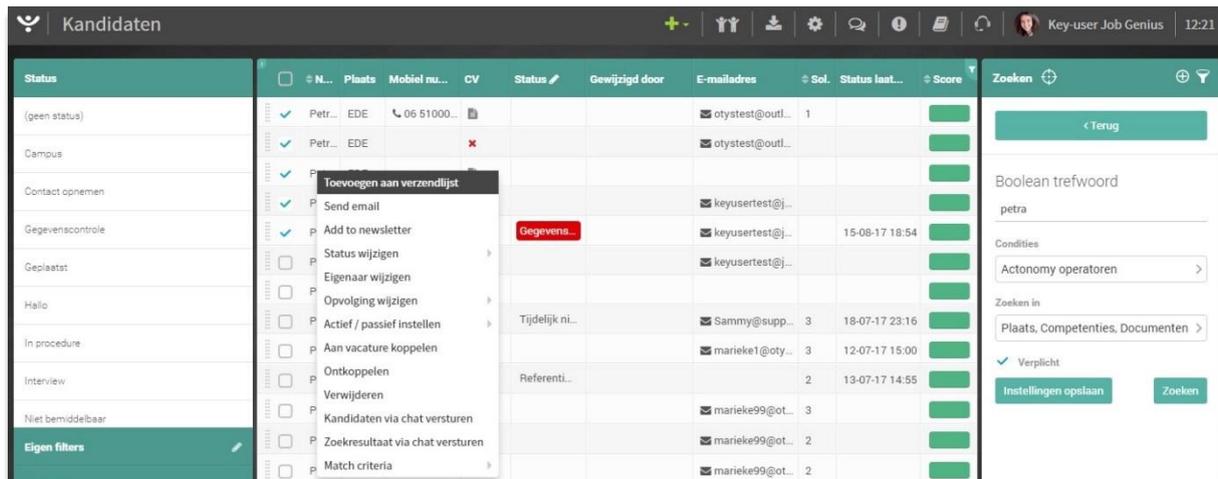


Fig. 15 – Batch add candidates to a mailing list

You do this by checking the candidates to be added and selecting 'Add to mailing list' for the whole batch. You then have two options: 'To existing mailing list' and 'To new mailing list'.

If you choose the first option, a window opens where you can select an existing mailing list. Once you have done this and confirmed it, the selected candidates will be added to the mailing list. If you choose the second option, a window opens in which you can give the new mailing list a name. You can also mark the mailing list as 'Temporary'. In that case, the mailing list will automatically be deleted after a week. Once you have done this and confirmed it, the selected candidates will be added to the mailing list.

Note: only the selected candidates can be added. If you want to add a larger list of candidates to a mailing list, you can go to the navigation at the bottom right of the module to change this to a larger number of candidates. More information about this can be found in the manual 'Lists, Searches and Matching in Go!'.

In addition to being able to add candidates to a mailing list from the Candidate Module, it is also possible to carry out this action in the Procedures Module.

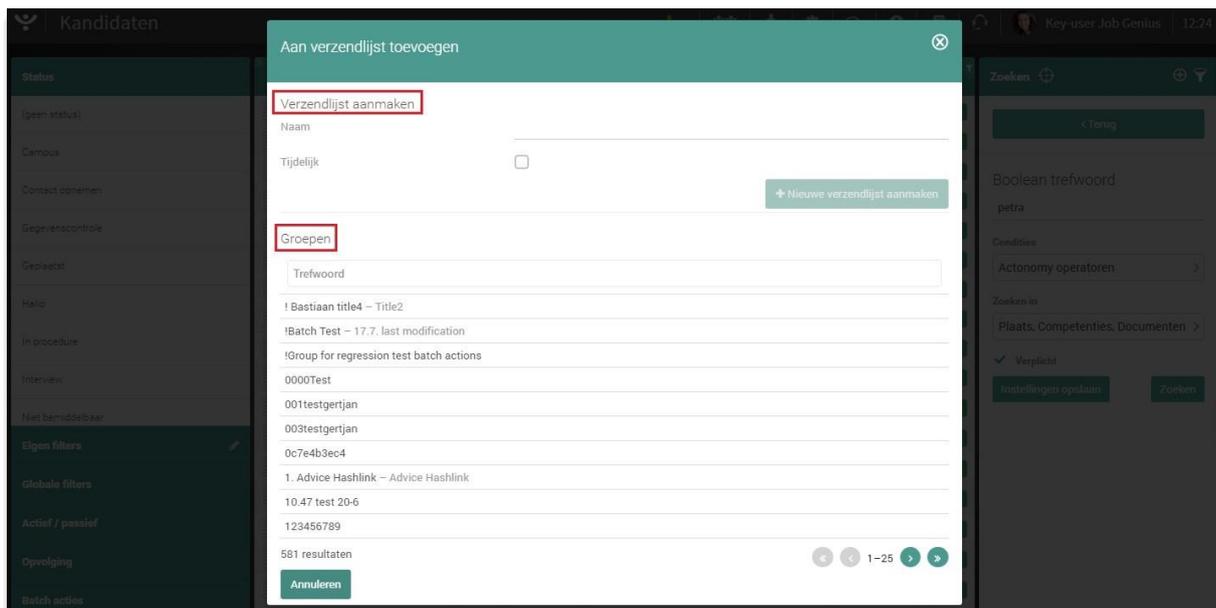


Fig. 16 – Add candidates to a new mailing list or an existing list

4.2 ADD CLIENTS TO MAILING LIST

In your CRM module you can search for clients with the advanced search filters. Once you have made a selection of clients, you can select these clients and add them to a mailing list at once.

This process is the same as adding candidates to a mailing list (see Section 4.1).

4.3 ADD CONTACTS TO MAILING LIST

In your CRM module you can search for contacts with the advanced search filters. To do this, open your CRM module, and click on the 'Contacts' icon at the top of the screen. You will now see a list of contacts in your database. Once you have made a selection of contacts, you can select those contacts and add them to a mailing list at once.

This process is the same as adding candidates to a mailing list (see Section 4.1).

4.4 SEND NEWSLETTER TO MAILING LIST

Once you have created a mailing list, you can use it when sending newsletters. To do this, select the mailing list in the 'Select mailing list' widget in a newsletter detail. More information about sending newsletters to mailing lists can be found in our 'Newsletter Module' manual.

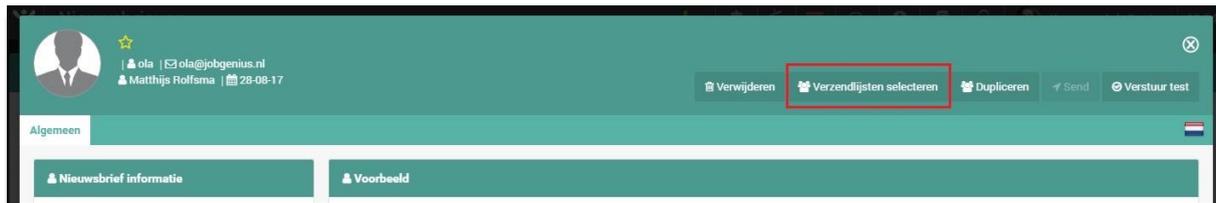


Fig. 17 – Select mailing list for a newsletter

4.5 SEND EMAIL TO MAILING LIST

Once you have created a mailing list, you can also use it when sending regular emails. To do this, click on the 'Add groups to recipients' icon in the 'To' line of the email. More information about sending newsletters to mailing lists can be found in our 'Newsletter Module' manual.

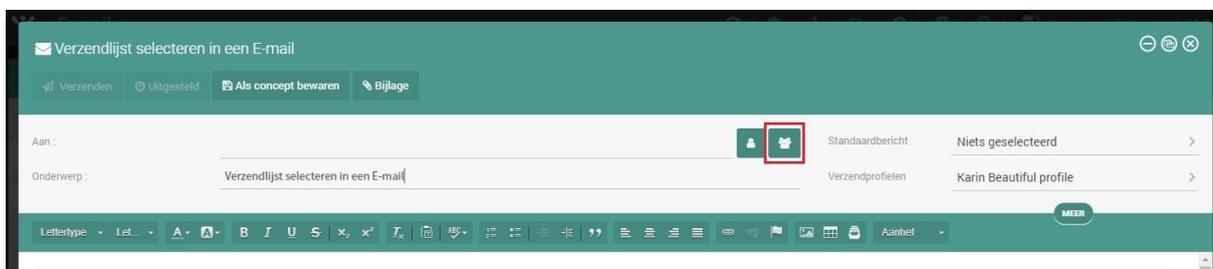


Fig. 18 – Select mailing list for an email