How to Set up HRCenter Email Templates

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Overview

Email templates, both basic and custom, can be created within HRCenter for the following steps:

- A new page, step, or workflow is assigned.
- A step has been submitted.
- A step has been rejected.

This article covers the following:

- 1. How to Setup Basic HRCenter Email Templates
- 2. How to Setup Custom HRCenter Email Templates
- 3. FAQ

How to Setup Basic HRCenter Email Templates

Throughout HRCenter applicants as well as users will receive email notifications depending upon the actions performed throughout the stages of the application and hiring process.

Note These email options can be turned on/off depending on users preference within the tenants section of administration.

Creating Basic Email Templates

Begin by logging into HRCenter Administration.

| HRCENTE | | | |
|------------|---|---------------------|--|
| Dashboard | | | Selected Tenant: HiTech |
| Tenants | Dashboard | | |
| Workflows | Tools | | Support |
| Pages | Form Builder Use this tool to upload an image and create an HTML Form Template. | Image Form Builder | Knowledge Base Have a question? Want to learn more about a particular topic? Check out the |
| Surveys | | | manuals and more. If necessary, you can also open a support ticket directly from |
| Surveys V2 | Data Refresh Clicking this button will refresh all cached lists to new values. This includes position types, skills, and now heard of values. | Refresh Cached Data | the knowledge base. Live Chat Chat with a support representative live. (Live Chat available Monday – Thursday, |
| Forms | | | 7:00 am - 7:00 pm CDT and Friday, 7:00 am - 5:00 pm CDT) |

Within the Administration Dashboard, select the "Tenants" tab on the left:

Expand the information for the your HRCenter Tenant, scroll down to the bottom of the page, and select "Modify Templates" within the Email Templates card:

| Email Templates | |
|--|------------------|
| Modify Create and modify email templates. | Modify Templates |

Within the "Choose Your Template" window, you will have the option to create/modify templates for the following steps of the Workflow process:

- New Item Assigned: Sent out to applicant when a new page, step or workflow is assigned.
- **Step Submitted**: Sent to the staffing company (the branch) to inform users the applicant has finished a step within the process.
- Step Rejection: Sent to the branch if applicant enters unqualified information within a page.

Enter text within the fields presented and, once complete, select "Save" for that tab:

| Choose Your Template | × | | |
|---|---|--|--|
| New Item Assigned Step Submitted Step Rejection O | | | |
| From Email | _ | | |
| donotreply@twdemo.com | | | |
| From Name | | | |
| Test Template | | | |
| Subject | | | |
| Online Application - New Item is Available | | | |
| Default Text | _ | | |
| You have been invited to complete an item in the online application or onboarding process for <u>HiTech</u> Staffing. | | | |
| After you have had an opportunity to enter the requested information and reviewed your responses, please be sure to submit the information as the final step. | | | |
| Thanks! | 1 | | |
| Add Localization | _ | | |
| English | | | |

Note After modifying a template for a specific step, make sure to select "Save" for each tab before continuing to the next.

If you select another tab without saving, the previously entered information will be lost.

Once the templates have been saved, navigate to the "Dashboard" tab on the left and select "Refreshed Cached Data" to ensure the changes take effect for the email templates:

| HRCENTER | |
|------------|---|
| Dashboard | |
| Tenants | Dashboard |
| Workflows | Tools |
| Pages | Form Builder Use this tool to upload an image and create an HTML Form Template. Image Form Builder |
| Surveys | |
| Surveys V2 | Data Refresh Refresh all cached lists to new values. This includes position Refresh Cached Data types, skills, and how heard of values. Refresh Cached Data Refresh Cached Data |
| Forms | |

How to Setup Custom HRCenter Email Templates

Email templates are able to be created within HRCenter that contain data fields that will populate with the intended information once the email has been sent. These data fields are pre-determined and need to be entered exactly as shown for the intended information to populate within the email.

Note For Self-Hosted clients, in order to utilize the new email template functionality with data fields, you will need to ensure your API is updated to version 3.2022.310 or later.

If your API is not updated, you will still be able to continue utilizing HRCenter Email Templates but you will be unable to add the data fields.

Creating Custom Email Templates

Begin by logging into HRCenter Administration.

| HRCENTER | | | |
|---------------------|---|---------------------|---|
| Dashboard | | | Selected Tenant: HiTech |
| Tenants | Dashboard | | |
| Workflows | Tools | | Support |
| Pages | Form Builder Use this tool to upload an image and create an HTML Form Template. | Image Form Builder | Knowledge Base Have a question? Want to learn more about a particular topic? Check out the TempWorks knowledge base for searchable access to training documents, videc manuals and more. If necessary you can also open a support licked interd if you |
| Surveys V2 Forms | Data Refresh Clicking this button will refresh all cached lists to new values. This includes position types, skills, and how heard of values. | Refresh Cached Data | the knowledge base. Live Chat Chat will a support representative live. (Live Chat available Monday – Thursday 7.00 am – 7.00 pm CDT and Friday, 7.00 am – 5.00 pm CDT) |

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| Email Templates | |
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| Modify Create and modify email templates. | Modify Templates |

Within the "Choose Your Template" window, you will have the option to create/modify templates for the following steps of the Workflow process:

- New Item Assigned: Sent out to applicant when a new page, step or workflow is assigned.
- **Step Submitted**: Sent to the staffing company (the branch) to inform users the applicant has finished a step within the process.
- Step Rejection: Sent to the branch if applicant enters unqualified information within a page.
- Application Receipt: Sent to the applicant when applying to a job via the Job Board, Job Board via WebCenter, and/or Buzz.

Note After modifying a template for a specific step, make sure to select "Save" for each tab before continuing to the next.

If you select another tab without saving, the previously entered information will be lost.

When creating/modifying email templates, you can utilize the following data fields within the subject and body of the email:

| Template Compatibility | Data Field Name | Related Field Name | Location of Data Field |
|--|-------------------------|---------------------|--|
| New Item AssignedStep SubmittedStep Rejection | * wf_name * | Workflow Name | Beyond > Employee > Onboarding > + Assign > Assign A New Workflow > Workflow |
| New Item AssignedStep SubmittedStep Rejection | * step_name * | Step Name | Beyond > Employee > Onboarding > + Assign > Assign A New Workflow > Start at Step |
| New Item Assigned Step Submitted Step Rejection Application Receipt | * employee_first_name * | Employee First Name | Beyond > Employee > Details > Personal > Employee Personal Information > First Name |

| Template Compatibility | Data Field Name | Related Field Name | Location of Data Field |
|--|------------------------|---|---|
| New Item AssignedStep SubmittedStep RejectionApplication Receipt | * employee_last_name * | Employee Last Name | Beyond > Employee > Details > Personal > Employee Personal Information > Last Name |
| New Item AssignedStep SubmittedStep RejectionApplication Receipt | * employee_id * | Employee ID | Beyond > Employee > Visifile > Snapshot > ID |
| New Item AssignedStep SubmittedStep RejectionApplication Receipt | * employee_phone * | Primary Employee Phone Number | Beyond > Employee > Visifile > Contact Information > Phone that is set to Primary |
| New Item Assigned Step Submitted Step Rejection Application Receipt | * employee_email * | Primary Employee Email Address | Beyond > Employee > Visifile > Contact Information > Email that is set to Primary |
| New Item Assigned Step Submitted Step Rejection Application Receipt | * branch_name * | The name of the Branch the employee is assigned to. | Beyond > Employee > Details > Personal > Branch |
| New Item AssignedStep SubmittedStep RejectionApplication Receipt | * branch_id * | The identification number of the Branch. | N/A |
| New Item AssignedStep SubmittedStep RejectionApplication Receipt | * branch_phone * | Branch Phone Number | Enterprise > All Options > Administration > Branch > Main Info > Phone |
| New Item AssignedStep SubmittedStep RejectionApplication Receipt | * branch_email * | Branch Email Address | Enterprise > All Options > Administration > Branch > Main Info > Email |

| Template Compatibility | Data Field Name | Related Field Name | Location of Data Field |
|--|-------------------------|---|---|
| New Item Assigned Step Submitted Step Rejection Application Receipt | * branch_address * | Branch Full Address | Enterprise > All Options > Administration > Branch > Main Info > Branch Address |
| New Item AssignedStep SubmittedStep RejectionApplication Receipt | * recruiter_name * | Staffing Specialist | Beyond > Employee > Details > Hiring > Staffing Specialist |
| New Item Assigned Step Submitted Step Rejection Application Receipt | * recruiter_phone * | Recruiter (Hiring Specialist) Phone Number | Enterprise > All Options > Administration > Service Rep > Service Rep Info > Main Rep Info > Phone Number |
| New Item AssignedStep SubmittedStep RejectionApplication Receipt | * recruiter_email * | Recruiter (Hiring Specialist) Email | Enterprise > All Options > Administration > Service Rep > Service Rep Info > Email |
| New Item AssignedStep SubmittedStep RejectionApplication Receipt | * UserName * | Employee Web User Account Username | Beyond > Employee > Web User > View Account Details > Username |
| Application Receipt | * job_order_id * | Job Order ID | Beyond > Job Order > Job Order ID |
| Application Receipt | * job_title * | Job Title | Beyond > Job Order > Job Title |
| Application Receipt | * datetime_email_sent * | Date Job Receipt Email Queued | Beyond > Job Order > Candidates > Date Job Receipt Email Queued |

Note The following fields can only be used within the default "Application Receipt" email template:

- *|job_order_id|*
- *|job_title|*
- *|datetime_email_sent|*

The aforementioned fields will only work for the "Application Receipt" email template. They will not pull data

if used on the existing HRCenter email templates (New Item Assigned, Step Submitted, & Step Rejection).

| HRCENTER | | | |
|--|---|---|-------------------------------|
| ashboard | Controls whether or not an inactivity Dia of time. | Choose Your Template X | a digital certificate to veri |
| Tenants | Inactivity Redirect Time | NEW ITEM ASSIGNED STEP SUBMITTED STEP REJECTION APPLICATION RECEIPT | |
| Vorkflows | After the inactivity dialog is shown; Amo | From Email | |
| ages | | support@tempworks.com | - |
| urveys | Amount of time that when reached, sho | From Name | |
| orms | 18000 | | |
| Tempworks Only | Language | Subject Thank you for applying | |
| ctions | | Default Text | |
| locument Database | Controls whether English translations w | Hello, * employee_first_name * | |
| Vorkflow Sync | | Thank you for applying to the "ljob_titlel" position. We are providing this receipt to acknowledge your application. This email was sent on " datetime_email_sent ". | |
| | W Language Controls whether UK translations will be | For any additional questions, you can contact our office at " branch_phone " or " branch_email ". We are located at " branch_address ". | |
| Contempworks | | Thank you. | |
| Software, Inc. ©2024 1.0.0.0 - 24.09.24.0826) | Spanish Language Controls whether Spanish translations w | | |
| | | Add Localization | |
| | Registration | English | |
| | Show the branches address on the sele | ction dropdown. | |
| | | | |

The following fields are able to be used within the "Application Receipt" HRCenter email template:

- "branch_address"
- "branch_email"
- "branch_name"
- "branch_phone"
- "datetime_email_sent"
- "employee_email"
- "employee_first_name"
- "employee_id"
- "employee_last_name"
- "employee_phone"
- "job_order_id"
- "job_title"
- "UserName"
- "recruiter_email"
- "recruiter_name"
- "recruiter_phone"

For more information on the Automatic Job Receipt functionality, please see the article titled Beyond - Automatic Job Application Receipt.

Note Data fields need to be entered exactly as shown within the table above for their respective information to appear within the email that is sent:

| Choose Your Template | | | × |
|--|--|--|-----|
| New Item Assigned | Step Submitted | Step Rejection | 0 |
| From Email | | | |
| info@tempworks.com | | | |
| From Name | | | |
| Service Rep | | | |
| Subject | | | |
| New workflow assigne | d to aident * employe | e_id * for Branch * branch_name * | |
| Default Text | | | |
| Hello, * employee_first | namel* *lemployee | last_name *! | - |
| You have new items as assigned to you. Employee ID: ** emplo Employee Phone: * em Employee Email: * em Branch ID: * branch id Branch Phone: * branch | ssigned to complete. yee-id]** plovee_phone * plovee_email * * h_phone * | This Workflow Name: * <u>wf. name</u> * and Step Name: * <u>step. name</u> * was | • |
| Add Localization | | | |
| English | ~ | Remove S | ave |
| | | | |
| Data fields that are not emplate once the emai | entered exactly as I has been sent: | s shown will appear as the plain text entered within the email | |
| Hello, John Smith! | | | |
| You have new items as was assigned to you. | signed to complete. | This Workflow Name: Default Application and Step Name: Application | n |
| Employee ID: **jemploy Employee Phone: 123-4 Employee Email: john.s | /ee-id ** 456-7890 mith@gmail.com | | |

Once the information has been entered, within the specific tab, select "Save" and then continue to the next tab if you'd like to modify the email templates for the other steps:

Branch ID: 456

Branch Phone: 987-654-3210

| Choose Your Template | |
|---|----------|
| New Item Assigned Step Submitted Step Rejection | θ |
| From Email | |
| info@tempworks.com | |
| From Name | |
| Service Rep | |
| Subject | |
| New workflow assigned to aident * employee_id * from Branch * branch_name * | |
| Default Text | |
| Hello, * employee_first_name * * employee_last_name *! | _ |
| You have new items assigned to complete. This Workflow Name: *[wf_name]* and Step Name: *[step_name]* wa assigned to you. | IS |
| Employee ID: *[employee_id]* | |
| Employee Phone: * employee_phone * | |
| Employee Email: * employee email * | |
| Branch Phone: *[branch_phone]* | - |
| Add Localization | // |
| English | Save |

Once the templates have been saved, navigate to the "Dashboard" tab on the left and select "Refreshed Cached Data" to ensure the changes take effect for the email templates:

| | र | |
|------------|---|---|
| Dashboard | | |
| Tenants | Dashboard | |
| Workflows | Tools | |
| Pages | Form Builder Use this tool to upload an image and create an HTML Form Template. Image Form Builder | |
| Surveys | | |
| Surveys V2 | Data Refresh Clicking this button will refresh all cached lists to new values. This includes position types, skills, and how heard of values. | |
| Forms | | J |

FAQ

Q. What branch is the email being sent to for Step Submission and Step Rejection emails?

• A. The branch that will receive the notification is the branch that the employee applied to. This is the branch

that the applicant chose on the drop down on the HRCenter registration page:



Q. How do I know what email is associated to that Branch?

• A. Within enterprise go to Administration. Choose the Branch tab on the left had side. Select your Branch. There will be an Email field. The email in this field is where the notification will be sent:

| Section Administration | | | ► tasks annointmer | Currently | viewing 0 of 430813 ta | sks. View more |
|--|---|---|--|--|--|---|
| Administration | Find a branch 12 items available Canada Test CardiffUK Eagan Hennepin East Memphis CA Memphis NE Minneapolis National Accounts New Brighton PR Branch St. Cloud St. Paul | Main Info Com Active Web Public Branch Name Branch Full Name Branch Parent Branch Letter Branch Address Invoicing Address Invoicing Address Street 1 Street 2 Branch City Branch State Zip Tax State Hier | ▶ tasks appointmen mission Defaults Iminneapolis Minneapolis Minneapolis High Tech Staffing SE 222 West Holly Way Staffing Company 569 Staffing Stree Format Address 123 main st Iminneapolis Iminneapolis Still Still Still Minneapolis | Currently Its SOCIAL OF EINC Bank AP Bank Instant Bank Contractor Bank AuthCheck Bank AuthCheck Bank GLCode Business Code Burden Rate Worker COM Default Wirker CI Calc Salver Tax by 0 pay Oll Optio Inv ant Pay Limit Fechnical | High Tech Staffing Inc TCF Bank TCF Bank | sks. View more + ▼ C → + * * * * * * * * * * * * * |
| reports hrcenter vendors administration |) [| Country Phone Fax Email | United States of America 555-555-1212 321-321-1222 example@gmail.com | Branch Scanner T | P Address | |
| all options | | | | | 1 | |

Q. I need the email templates to be in another language for my applicants, can this be accomplished?

• A. Yes, localizations for email templates can be added by selecting the "Add Localization" dropdown, selecting

the language from within the dropdown (English, Spanish, or French), entering the intended text within the fields, and selecting "Save" for each tab once complete:

| Choose Your Template | | | × |
|----------------------|----------------|----------------|------|
| New Item Assigned | Step Submitted | Step Rejection | 0 |
| From Email | | | |
| From Name | | | |
| | | | |
| Subject | | | |
| | | | |
| Default Text | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Add Localization | | | |
| Spanish | ~ | | Save |
| English | | | |
| French | | | |

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