

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

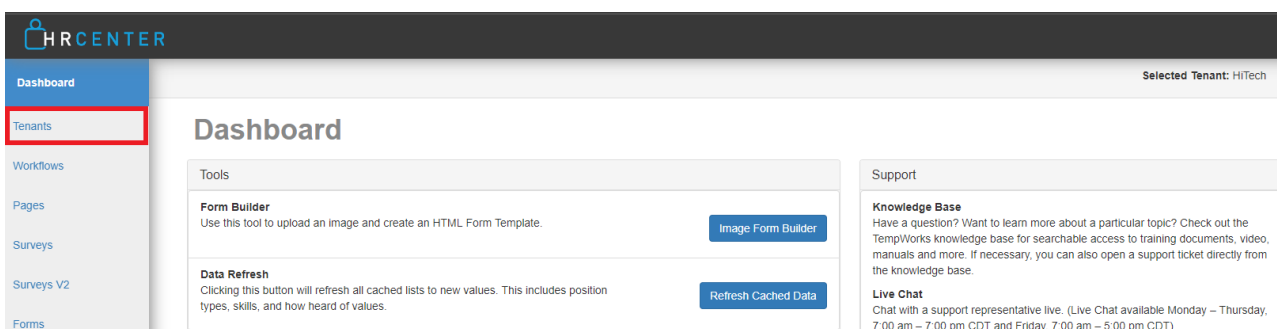
Throughout HRCenter applicants as well as users will receive email notifications depending upon the actions performed throughout the stages of the application and hiring process.

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.

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



The screenshot displays the HRCenter Administration Dashboard. The top navigation bar includes the HRCenter logo and the text "Selected Tenant: HiTech". The left sidebar contains a menu with the following items: Dashboard, Tenants (highlighted with a red box), Workflows, Pages, Surveys, Surveys V2, and Forms. The main content area is titled "Dashboard" and is divided into three sections: Tools, Support, and Knowledge Base. The Tools section includes a "Form Builder" tool with a description and an "Image Form Builder" button, and a "Data Refresh" tool with a description and a "Refresh Cached Data" button. The Support section includes a "Knowledge Base" section with a description and a "Live Chat" section with a description and availability information.

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

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 HiTech Staffing.
Please log in using the link below to complete this item.
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!

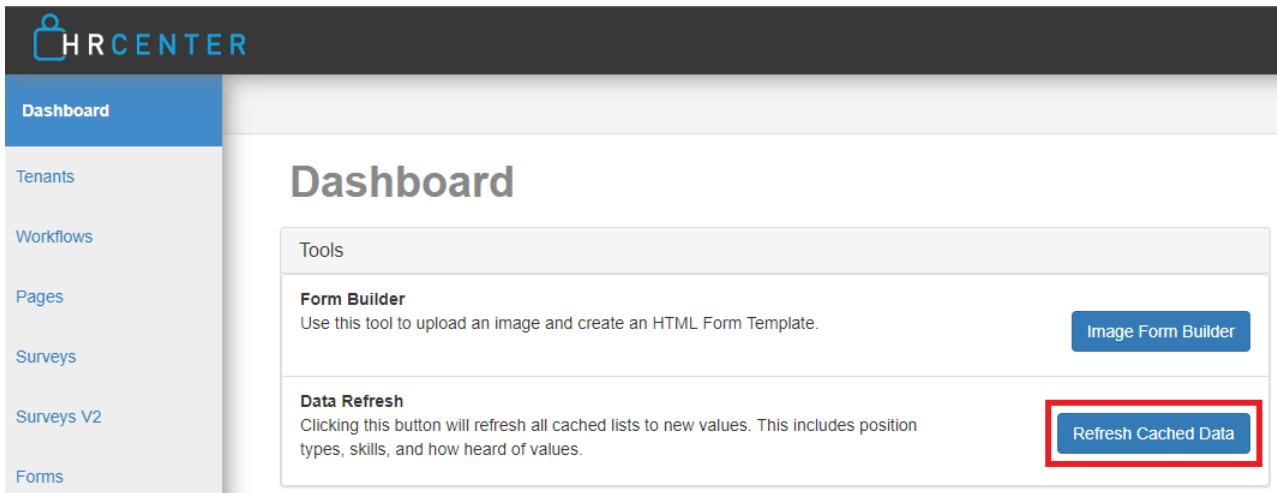
Add Localization
English

Remove Save

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:



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.

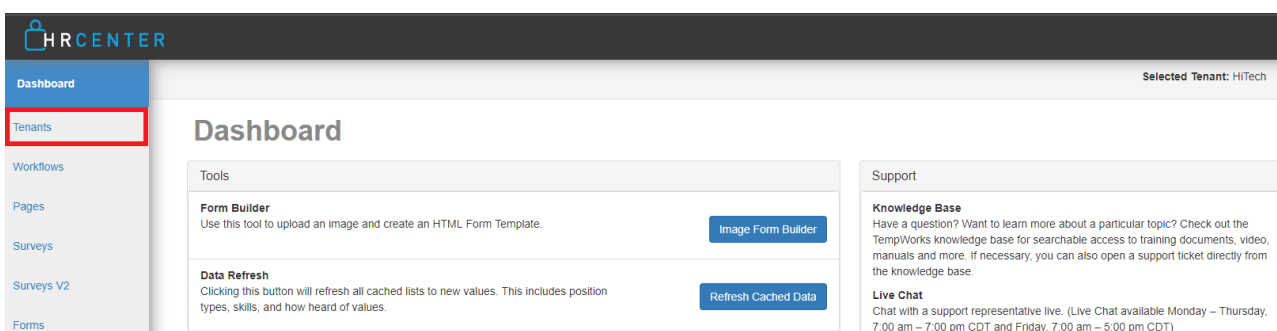
Note For **Self-Hosted** clients, in order to utilize the new email template functionality with data fields, you will need to ensure your API is updated to version 3.2022.310 or later.

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.

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.

Choose Your Template

New Item Assigned | **Step Submitted** | **Step Rejection**

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|* was assigned to you.

Employee ID: *|employee_id|*
Employee Phone: *|employee_phone|*
Employee Email: *|employee_email|*
Branch ID: *|branch_id|*
Branch Phone: *|branch_phone|*

Add Localization
English

[Remove](#) [Save](#)

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:

Data Field Name	Related Field Name	Location of Data Field
* wf_name *	Workflow Name	Beyond > Employee > Onboarding > + Assign > Assign A New Workflow > Workflow
* step_name *	Step Name	Beyond > Employee > Onboarding > + Assign > Assign A New Workflow > Start at Step
* employee_first_name *	Employee First Name	Beyond > Employee > Details > Personal > Employee Personal Information > First Name
* employee_last_name *	Employee Last Name	Beyond > Employee > Details > Personal > Employee Personal Information > Last Name
* employee_id *	Employee ID	Beyond > Employee > Visifile > Snapshot > ID
* employee_phone *	Primary Employee Phone Number	Beyond > Employee > Visifile > Contact Information > Phone that is set to Primary
* employee_email *	Primary Employee Email Address	Beyond > Employee > Visifile > Contact Information > Email that is set to Primary
* branch_name *	The name of the Branch the employee is assigned to.	Beyond > Employee > Details > Personal > Branch
* branch_id *	The identification number of the Branch.	N/A
* branch_phone *	Branch Phone Number	Enterprise > All Options > Administration > Branch > Main Info > Phone
* branch_email *	Branch Email Address	Enterprise > All Options > Administration > Branch > Main Info > Email
* branch_address *	Branch Full Address	Enterprise > All Options > Administration > Branch > Main Info > Branch Address

Data Field Name	Related Field Name	Location of Data Field
* recruiter_name *	Staffing Specialist	Beyond > Employee > Details > Hiring > Staffing Specialist
* recruiter_phone *	Recruiter (Hiring Specialist) Phone Number	Enterprise > All Options > Administration > Service Rep > Service Rep Info > Main Rep Info > Phone Number
* recruiter_email *	Recruiter (Hiring Specialist) Email	Enterprise > All Options > Administration > Service Rep > Service Rep Info > Email
* UserName *	Employee Web User Account Username	Beyond > Employee > Web User > View Account Details > Username

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

From Email
info@tempworks.com

From Name
Service Rep

Subject
New workflow assigned to aident *|employee_id|* 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|* was assigned to you.

Employee ID: *|employee-id|* ❌

Employee Phone: *|employee_phone|*

Employee Email: *|employee_email|*

Branch ID: *|branch_id|*

Branch Phone: *|branch_phone|*

Add Localization
English

Remove Save

Data fields that are not entered exactly as shown will appear as the plain text entered within the email template once the email has been sent:

Hello, John Smith!

You have new items assigned to complete. This Workflow Name: Default Application and Step Name: Application was assigned to you.

Employee ID: ****|employee-id|****

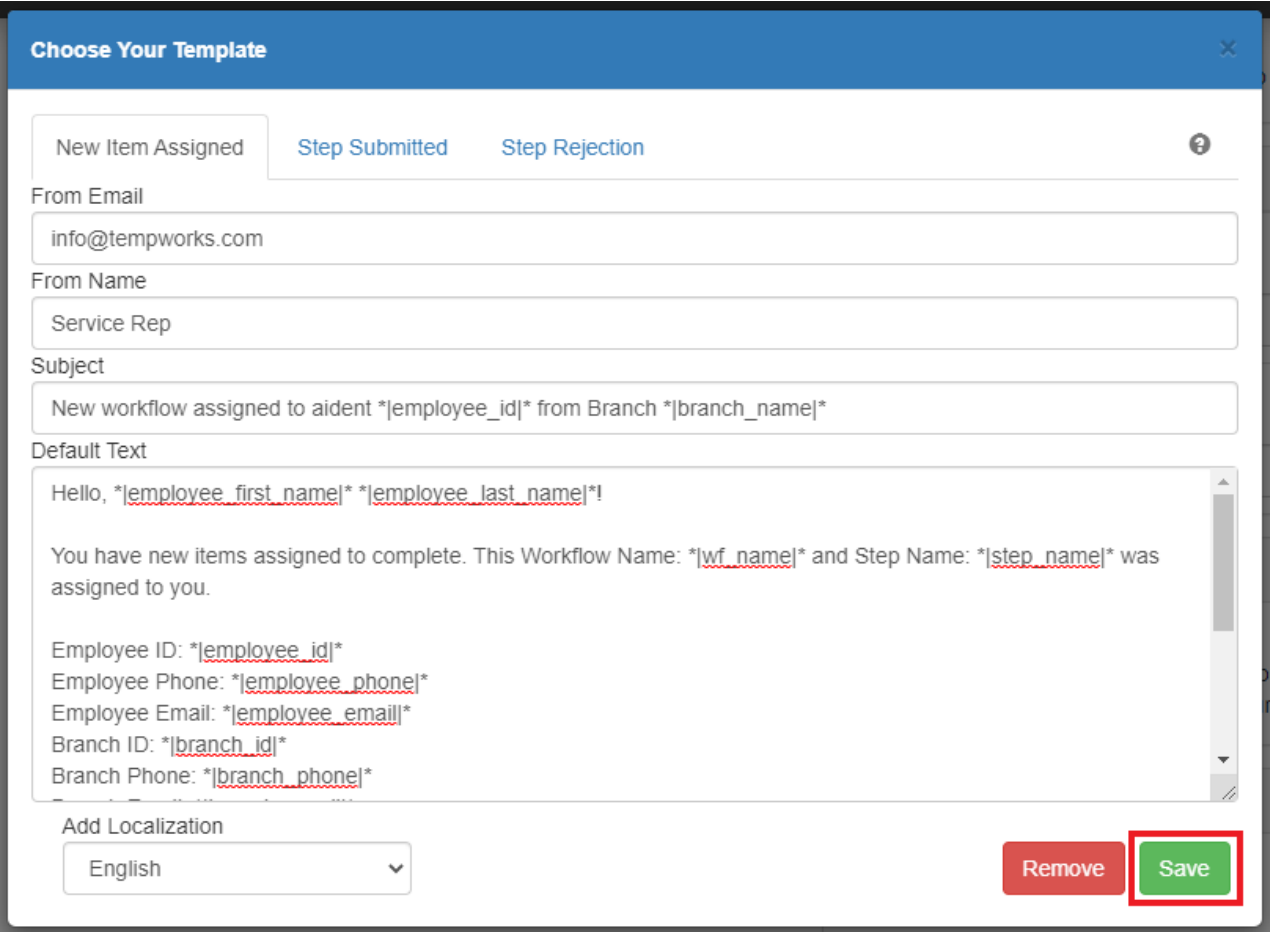
Employee Phone: 123-456-7890

Employee Email: john.smith@gmail.com

Branch ID: 456

Branch Phone: 987-654-3210

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:



Choose Your Template [X]

New Item Assigned | **Step Submitted** | Step Rejection [?]

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|* was assigned to you.

Employee ID: *|employee_id|*
Employee Phone: *|employee_phone|*
Employee Email: *|employee_email|*
Branch ID: *|branch_id|*
Branch Phone: *|branch_phone|*

Add Localization
English [v]

Remove 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:

Dashboard

Tools

Form Builder

Use this tool to upload an image and create an HTML Form Template.

Image Form Builder

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

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:

The screenshot shows the HR Center registration page. At the top is the HR CENTER logo. Below it is a link: "Already have an account? Sign in now". Underneath is a section titled "Find an office near you" with the text "Help us figure out how to get your information to the right office." There is a "ZIP Code" input field containing "55057" and a search icon. To the right of the ZIP code is an "OR" label and a green button with a location pin icon and the text "USE LOCATION". Below these is a dropdown menu labeled "Branch" with the selected option "Minneapolis (29.64 Miles)". The dropdown menu is highlighted with a red border.

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:

The screenshot shows the Administration interface with the following elements:

- Navigation Menu (Left):** Includes categories like 'branch', 'employee', 'customer', 'order', 'assignment', 'contact', 'pay / bill', 'reports', 'hrcenter', 'vendors', 'administration', and 'all options'. The 'branch' and 'administration' items are highlighted with red boxes.
- Search Bar:** 'Find a branch' with '12 items available'. The 'Minneapolis' branch is selected and highlighted with a red box.
- Main Info Tab:** Contains fields for branch details:
 - Active:
 - Web Public:
 - Branch Name: Minneapolis
 - Branch Full Name: Minneapolis
 - Branch Parent: High Tech Staffing
 - Branch Letter: SE
 - Branch Address: 222 West Holly Way
 - Invoicing Address: Staffing Company 569 Staffing Stre
 - Street 1: 123 main st
 - Street 2:
 - Branch City: minneapolis
 - Branch State:
 - Zip: 55121
 - Tax State:
 - Hier: Minneapolis
 - Country: United States of America
 - Phone: 555-555-1212
 - Fax: 321-321-1222
 - Email: example@gmail.com
- Commission Defaults Tab:** Contains dropdown menus for:
 - EINC: High Tech Staffing Inc
 - Bank: TCF Bank
 - AP Bank: TCF Bank
 - Instant Bank: TCF Bank
 - Contractor Bank: TCF Bank
 - AuthCheck Bank: TCF Bank
 - AR Bank: TCF Bank
 - GLCode: 55
 - Business Code:
 - Burden Rate: 2.0000
- worker comp options:**
 - Default Worker Comp: Clerical/Tele Phor
 - Calc Sal Tax by Gross Profit:
- payroll options:**
 - Instant Pay Limit: \$0.00
- technical:**
 - Branch Scanner IP Address:
 - Branch Scanner Type:

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 ⓘ

From Email

From Name

Subject

Default Text

Add Localization

Spanish ▼

- English
- Spanish
- French

Save

Related Articles