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.

CHRCENTER				
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			TempWorks knowledge base for searchable access to training documents, video, 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 From Email	
donotreply@twdemo.com	1
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	2
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:

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 Clicking this button will refresh all cached lists to new values. This includes position types, skills, and how heard of values. 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 TemplyVorks knowledge base for searchable access to training documents, video 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 how heard of values.	Refresh Cached Data	the knowledge base. Live Chat Chat with 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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- **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 AssignedStep SubmittedStep RejectionApplication 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 *	Number	Beyond > Employee > Visifile > Contact Information > Phone that is set to Primary
New Item AssignedStep SubmittedStep RejectionApplication Receipt	* 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 Assigned Step Submitted Step Rejection Application Receipt 	* branch_id *	The identification number of the Branch.	N/A
 New Item Assigned Step Submitted Step Rejection Application Receipt 	* branch_phone *	Branch Phone Number	Enterprise > All Options > Administration > Branch > Main Info > Phone
 New Item Assigned Step Submitted Step Rejection Application 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 Assigned Step Submitted Step Rejection Application 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 Assigned Step Submitted Step Rejection Application Receipt 	* recruiter_email *	Recruiter (Hiring Specialist) Email	Enterprise > All Options > Administration > Service Rep > Service Rep Info > Email
 New Item Assigned Step Submitted Step Rejection Application 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	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		
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, "Jemployee_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 ".	
	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 v		
		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
info@tempworks.com			
From Name			
Service Rep			
Subject			
New workflow assigne	ed to aident * employe	ee_id * feer Branch * branch_name *	
Default Text			
Hello, * employee_firs	t_namel* *lemplovee	last_namel*!	•
You have new items a assigned to you. Employee ID: ** emplo Employee Phone: * em Employee Email: * em Branch ID: * branch_ic Branch Phone: * branch_ic	oyee-id]** * nployee_phone * nployee_email * dl*	This Workflow Name: * <u>wf_name</u> * and Step Name: * <u>step_name</u> * was	•
Add Localization	~	Remove	ave
Data fields that are not template once the emai		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	on
Employee ID: ** employ Employee Phone: 123-			

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:

Employee Email: john.smith@gmail.com

Branch Phone: 987-654-3210

Branch ID: 456

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 *!	<u>_</u>
You have new items assigned to complete. This Workflow Name: * wf_name * and Step Name: * step_name * wa assigned to you.	S
Employee ID: *[employee_id]*	
Employee Phone: * employee_phone *	
Employee Email: * <u>lemployee_email</u> * Branch ID: * <u>lbranch_id</u> *	
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		
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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		viewing 0 of 430813 tas	ks. View more
accruals adjustment assessment packages • attendance authorities • branch • business code types • commission company custom data drop downs • employers evaluations avternal services employee customer order assignment contact pay / bill	Find a branch 12 items available Canada Test CardiffUK Eagan Hennepin East Memphis CA Memphis NE Matonal Accounts New Brighton PR Branch St. Cloud St. Paul	Active Web Public Branch Name Branch Full Name Branch Parent Branch Address Invoicing Address Invoicing Address Street 1 Street 2 Branch City Branch City Branch State Zip Tax State Hier	▶ tasks appointmen mission Defaults Minneapolis Minneapolis Minneapolis High Tech Staffing SE 222 West Holly Way Staffing Company 569 Staffing Stre Format Address 123 main gt minneapolis S5121 Minneapolis Minneapolis Minneapolis		High Tech Staffing Inc TCF Bank TCF Bank TCF Bank TCF Bank TCF Bank TCF Bank TCF Bank S5 2.0000 TCF Bank S5 2.0000 Clerical/Tele Gross Profit	+ ▼ 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		*
all options						

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	θ
From Email			
From Name			
Subject			
Default Text			
Add Localization			11
Add Localization Spanish	~		Save
English			Save
Spanish			
French			

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