Beyond - How to Utilize Email Templates

What are Email Templates?

Email templates allow you to customize emails that are sent to large numbers of employees (including assigned) and customer contacts. Beyond allows you to create, configure, and manage employee and contact email templates.

In this article:

1. How to Use Email Templates in Beyond
2. Utilizing Personalized Information
3. Additional Options

Helpful Information

Before you begin utilizing email templates within Beyond, please review the following Knowledge Base articles for additional information:

- Beyond - How to Import Email Templates from Enterprise

- Beyond - How to Create Email Templates
- Beyond - How to Manage Email Templates

Note There is a limit of 100 recipients when sending an email while using an email template.

How to Use Email Templates in Beyond

At this time, Beyond email templates can only be used for emails you send to employees (including assigned) or customer contacts. This means there are three template types to choose from: **Employee Templates, Contact Templates, and Assignment Templates**.

The following data fields work in Beyond:

Field Name	Employee Template	Contact Template	Assignment Template
First Name	X	X	X
Last Name	X	X	X
Middle Name	X		X
Street 1	X	X	X
Street 2	X	X	X
Municipality (City)	X	X	X
Region (State)	X	X	X
Postal Code	X	X	X
Primary Phone	X		X
Branch Full Name	X		X
Branch Phone	X		X
Branch Email	X		X
Branch Street 1	X		X
Branch Street 2	X		X
Branch City/Town	X		X
Branch State/Region	X		X
Branch Postal Code	X		X
Web Username	X		X
Company Name		X	
Department Name		X	
Employer Company Name		X	
Bill Rate			X

Field Name	Employee Template	Contact Template	Assignment Template
Pay Rate			X
Start Date			X
Start Time			X
End Time			X
Alternate Assignment			X
Shift			X
Double Time Bill Rate			X
Worksite Address			X
Supervisor			X
Directions			X
Job Title			X
Customer Name			X

You can use email templates anytime you use email in Beyond. Keep in mind that when you email employees, you will only see Employee Templates. When you are emailing customer contacts, you will only see Contact Templates. And when you are emailing employees from an assignment or order record, you will only see Assignment Templates.

Note Before you can utilize email templates in Beyond, you must first set up your initial email in Beyond. Check out Beyond - Email Setup for more information.

To utilize email templates in Beyond, there are three methods:

1. Select Recipient(s) and Choose a Template from the Email Composer
2. Compose an Email from Search Results
3. Compose an Email from the Email Template

Select Recipient(s) and Choose a Template from the Email Composer

You can use email templates to send an email to either one employee/customer contact/assignment or multiple employees/customer contacts/assignments.

To email one employee or customer contact:

1. Select their email on their record.
2. A pop-up will ask "How would you like to compose this email?" Select **Use Beyond.** This will open the email composer.

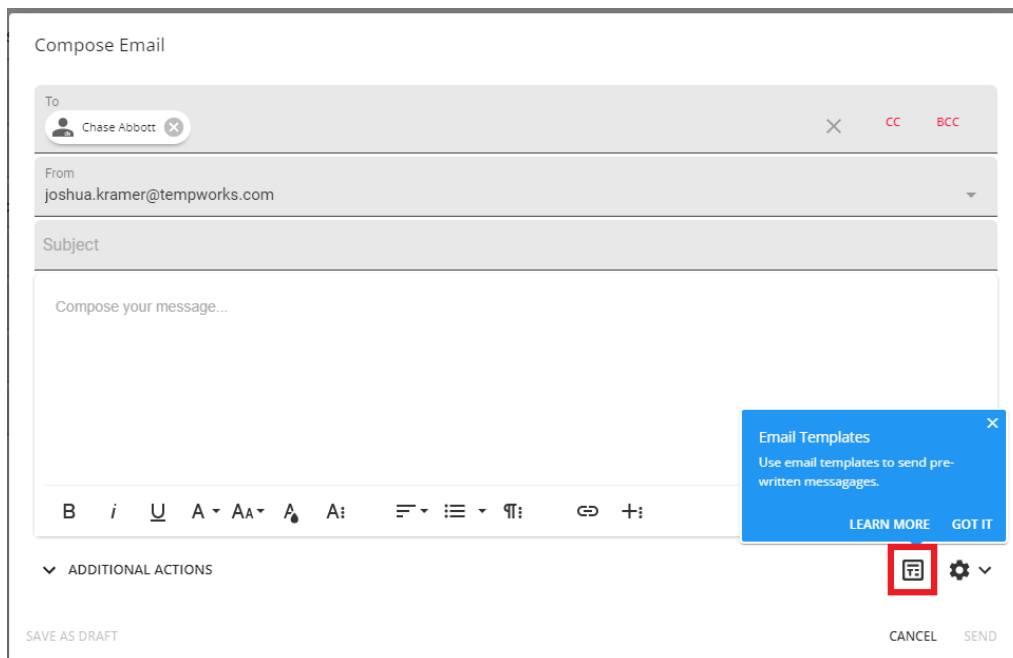**To email via one assignment record:**

Navigate to the assignment record in which an email will be sent.

Within the assignment record, select the ⋮ icon to the right and select "Send Email":

VISIFILE DETAILS ∨ MESSAGES CUSTOM DATA   Send Email

∨ Details   ✎

∨ Job Information   ✎

Note The "Send Email" option is only able to be selected if the recipient of the email has a "Primary Email" listed on their employee record.

Within the "Compose Email" window, select the associated Assignment Email Template from the list:

Compose Email

To
👤 Chase Abbott ⊗   ✕   CC   BCC

From
joshua.kramer@tempworks.com   ▾

Subject

Compose your message...

Email Templates   ✕
Use email templates to send pre-
written messagages.

                                                   LEARN MORE   GOT IT

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∨ ADDITIONAL ACTIONS   🗓   ⚙ ∨

SAVE AS DRAFT   CANCEL   SEND

Once the recipients and information has been verified within the email, select "Send".

Compose an Email from Search Results

To email multiple employees, customer contacts, or assignments:

Select employees, customer contacts, or assignments from the Search Results.

Once you have selected your desired number of recipients, select the "# Selected" button on the upper left of your search results:

Select "Email Recipients". This will open the email composer.

Select the Email Templates icon, located on the bottom right of the email composer:

Note When you select an email template, it will clear anything you have written in the compose section.

Select your desired template:

CC

es ⊗	Anthony Barr ⊗	Patty Borstsle ⊗	
riggs ⊗	Michael Cochran ⊗	Scott Crichton ⊗	✕

▾

INSERT TEMPLATE

Search templates

Completed Documents

Current Opportunities

~~John's Kavaliro Test Template~~
Used to reach out to employees we haven't heard from

New Hire Packet

Updating Paperwork

Welcome Letter

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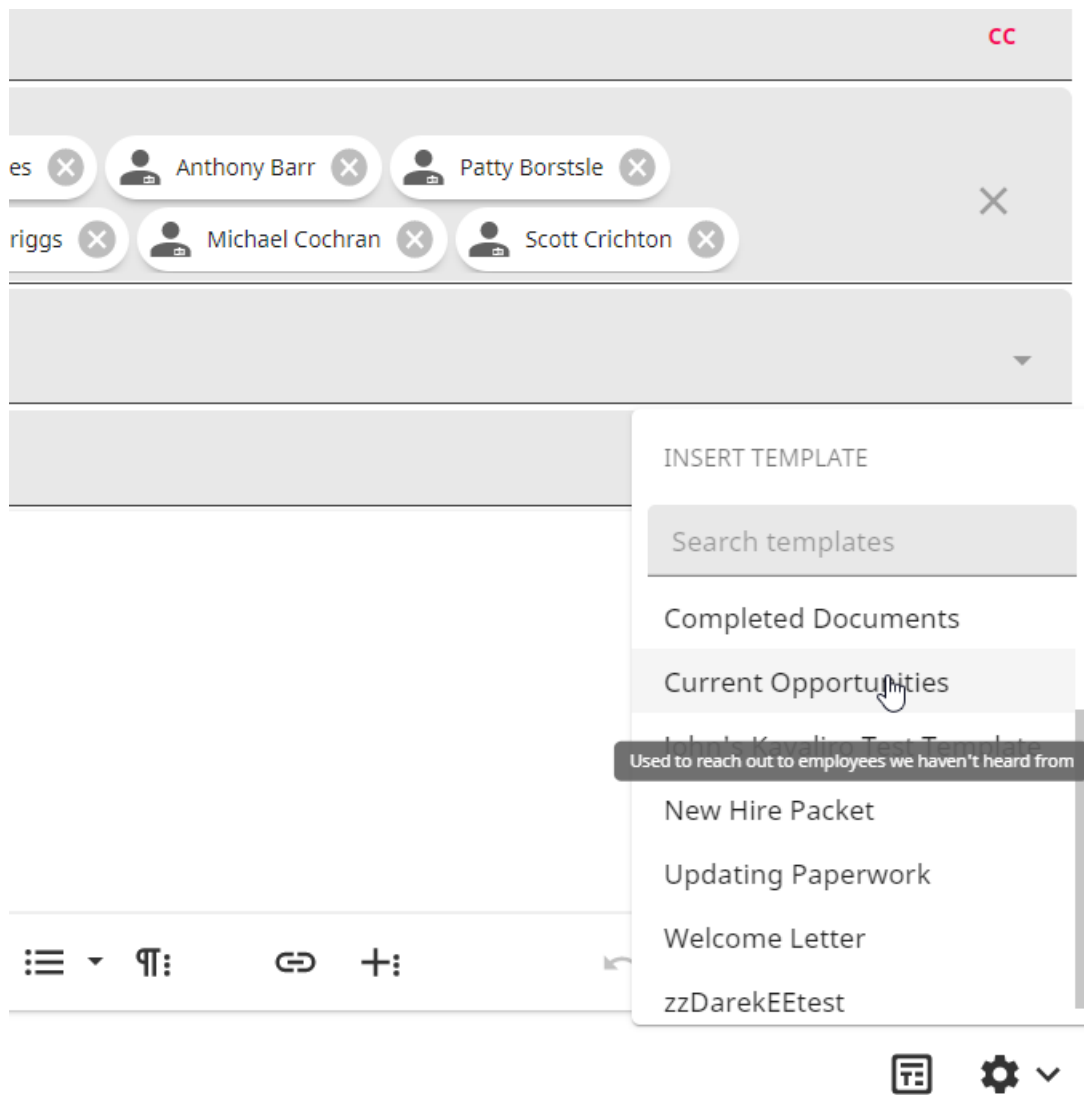
The template will fill the body of the email:

Compose Email

To

Recipients...

CC

Bcc

Jill Johnson, ABC Corporation ⊗   MacKenzie Keith, Aardvark Industries Inc ⊗

Dee Dawson, Dees Diner ⊗   zzRoger ZzOlson, null ⊗   John McDonald, ABC 123 ⊗

Jack Sanders, Panasonic ⊗   Janice Horizons, New Horizons Inc ⊗

Luke McQuire, Sasquatch Steel ⊗   Tim Butler, Worthington Industries ⊗   ✕

From

Your email address here

Subject

Compose your message...

B *i* U A: ≡▾ ☰▾ ¶:   +:   ↶ ↷ 📎 ✍▾ ⋮

∨ ADDITIONAL ACTIONS   🗔 ⚙ ∨

SAVE AS DRAFT   CANCEL   SEND

Once the template has been chosen, verify that all of the information is presented correctly and select 'Send Emails' once complete.

Note There is a limit of 100 recipients when sending an email while using an email template.

To email multiple assignment records via the order record:

Alternatively, if you have multiple assignments with information to be emailed, this can be done via the order record.

Navigate to the order record that has the assignments in which an email will be sent.

Within the order record, select the "Assignments" tab:

Select one or multiple of the assignments from the list, select the dropdown, and select "Email Recipients":

Note The "Email Recipients" option is only able to be selected if the recipients of the email have a "Primary Email" listed on their employee records.

Within the "Compose Email" window, select the associated Assignment Email Template from the list:

Once the recipients and information has been verified within the email, select "Send".

Compose an Email from the Email Template

The third option to send emails in Beyond using email templates is to utilize the 'Compose from Template' option.
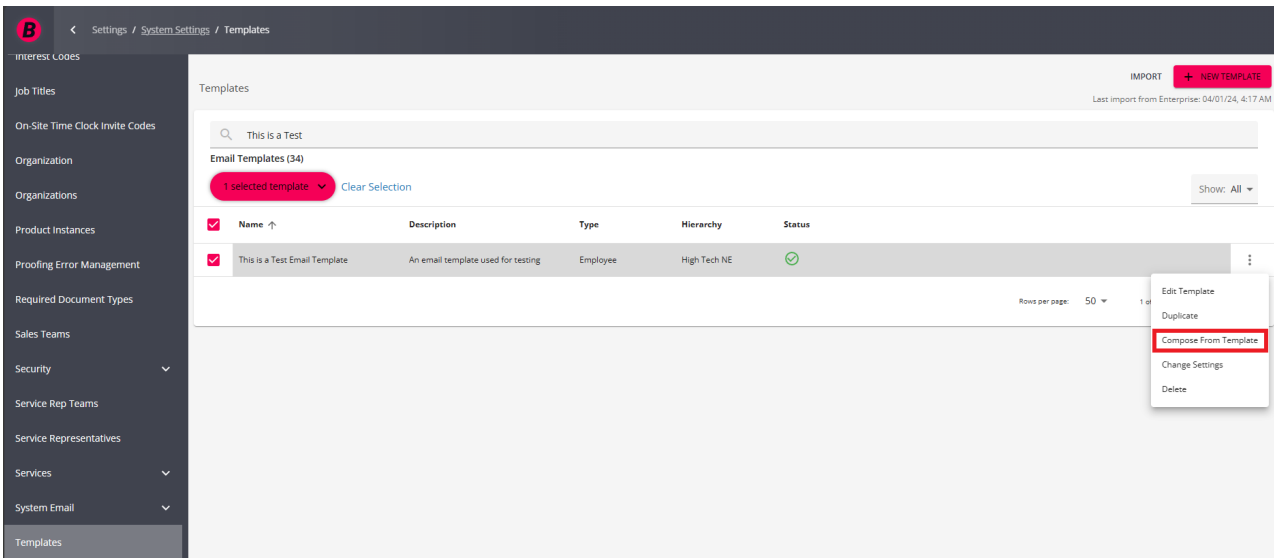
Begin by navigating to B Menu > System Settings > Templates.

> *Note* In order to see the Templates area of System Settings, you will need to have the "General Administrate" permission. If you are missing this functionality and you are the Admin for your team, reach out to your TempWorks Account Manager or our TempWorks Support Team.

Highlight the template you want to send emails from and select the 'Compose from Template' option within the three dot menu to the right of the email template you want to copy:

> *Note* An email utilizing an "Assignment" template will be unable to be composed via B Menu > System Settings > Templates > Compose From Template.
>
> This is due to the assignment template not having the necessary context associated with the assignment related data fields.

The Compose Email from Template window will appear and you will have the following options:

- Select the employee or contact recipients (depending on the template type)
- Select the From email account

By selecting 'Additional Actions', you have the ability to link additional records as well as add the ability to log a message on the respective employee or contact file:

You also have the ability to add additional Data Fields within the email along with updating the severity and importance of the email by selecting the Insert Data Fields icon and gear icon respectively:

Compose Email from Template "This is a Test Email Template" ⌄

Employees (Bcc)
Recipients...   CC

From
Email Account   ⌄
From is required.

This is a Test

INSERT DATA FIELD

Search data fields

Primary Phone

First Name

Last Name

Middle Name

Street 1

Street 2

City/Town

Hello {{First Name}} {{Last Name}},

This is a test of using the new email template functionality within Beyond!

Thanks,

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⌄ ADDITIONAL ACTIONS   ▦   ⚙ ⌄

SAVE AS DRAFT   CANCEL   SEND

Compose Email from Template "This is a Test Email Template" ⌄

Employees (Bcc)
Recipients...   CC

From
Email Account   ⌄
From is required.

This is a Test

Hello {{First Name}} {{Last Name}},

This is a test of using the new email template functionality within Beyond!

Thanks,

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⌄ ADDITIONAL ACTIONS   ▦   ⚙ ⌄

SAVE AS DRAFT

                                                                    Importance ›

                                                                    Sensitivity ›

late   New Hire Documentation   Employee   High Tech Staffing   ⊘ Active
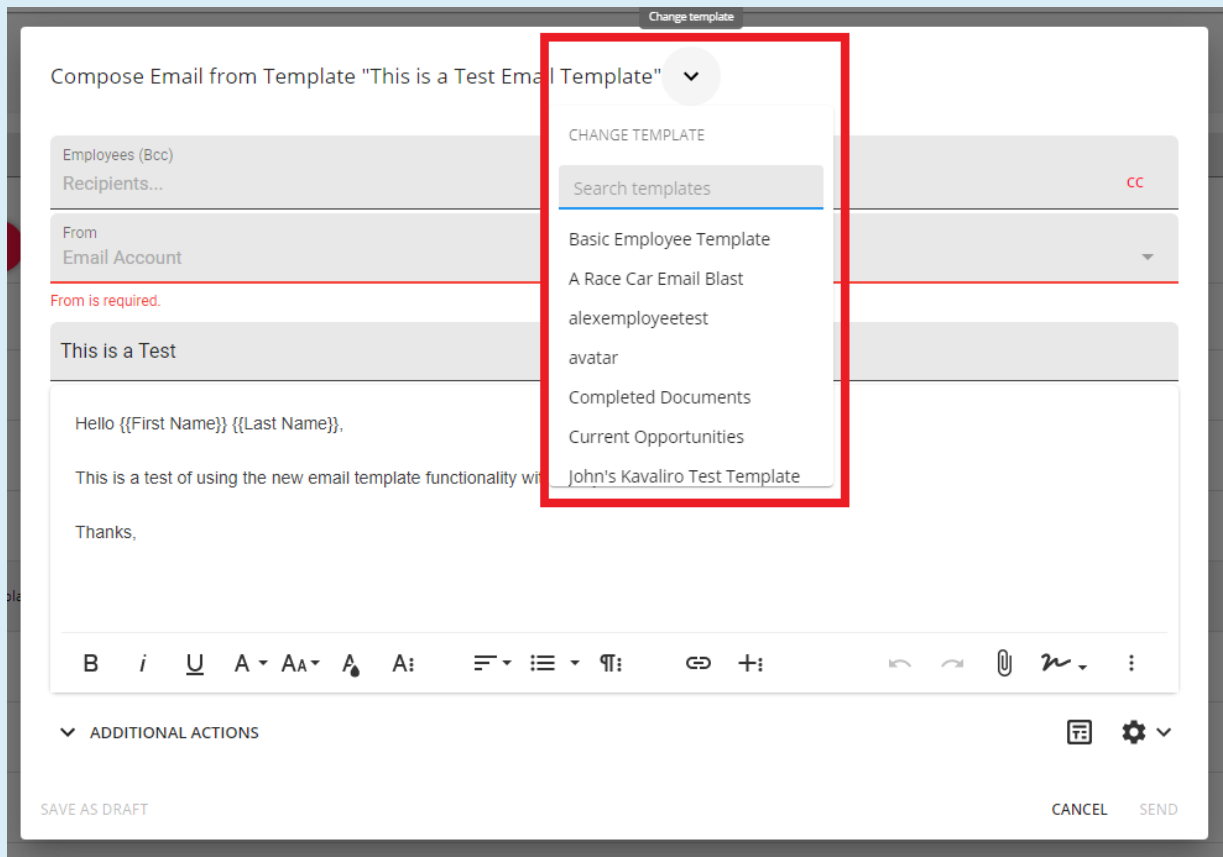
Once the required fields have been completed, and the email composition looks correct, select 'Send' to finish the process.

Utilizing Personalized Information

Seeing Personalized Information

Sending out a mass email doesn't have to feel impersonal. Our email templates auto-populate with specific information from individual contacts, ensuring that each recipient receives a personalized email.

For example, take an email's standard greeting. For most emails, you will probably prefer the greeting to begin with an individual recipient's name. Our email templates ensure this happens.

When you first select the email template, it will look like this in the composition field:

Updating Paperwork

Dear ==\{\{First Name\}\} \{\{Last Name\}\}== ,

Please stop in at your earliest convince to update your employee paperwork. Please call us at 798-769-4364 with any questions.

Thanks,

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⌄ ADDITIONAL ACTIONS   ⊞ ⚙ ⌄

But when a contact receives the email, they will only see their own name in the greeting:

Dear Troy Barnes,

Please stop in at your earliest convince to update your employee paperwork. Please call us at 798-769-4364 with any questions.

Thanks,

Adding information

You can also customize personalized fields after you've selected a template. To do this, follow these steps:

- Move your cursor to the place in you want to insert a new field.
- Select the Email Templates icon on the lower right.
- Select your desired personalized field (Primary phone, first name, last name, Street 1, etc)
- The email will now auto populate with the correct information from each individual recipient.

Compose Email

Employees (Bcc)

Andrew Aasen ⊗   Davis Acosta ⊗   Troy Barnes ⊗   Anthony Barr ⊗   Patty Borstsle ⊗
Abbe Branson ⊗   Dalyce Brell ⊗   Jonathan Briggs ⊗   Michael Cochran ⊗   Scott Crichton ⊗
✕   CC

From
twamelia1@gmail.com   ▾

Updating Paperwork

Dear \{\{First Name\}\} \{\{Last Name\}\},

We are currently reviewing contact information for all our employees to ensure we are reaching you at the right contact methods.

We also have additional paperwork that you need to complete. Please stop in at your earliest convince to update your employee paperwork. Please call us at 798-769-4364 with any questions.

Thanks,

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⌄ ADDITIONAL ACTIONS   ⊞ ⚙ ⌄

SAVE AS DRAFT   CANCEL   **SEND 10 EMAILS**

Additional Options

Once you've added an email template, you can still use a lot of the customization options that Beyond Email has to offer. Here are some ideas to take your email a step farther:

- Type in additional information or format text
- Add your signature
- CC an email (note that when you CC someone on a templated email, they will be copied on the email to each individual)
- Don't forget to add your message action code!

Note Looking for more information on all the options available, check out Beyond - How to Email in Beyond.

Related Articles