

Beyond - How to Import Email Templates from Enterprise

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How to Import Email Templates from Enterprise into Beyond

Email templates are able to be imported from Enterprise into Beyond.

Note Email templates created within Beyond will not transfer to Enterprise, and vice versa. In order to use email templates from Enterprise in Beyond, the import functionality will need to be used.

Begin by navigating to the 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](#).

The screenshot shows the Beyond System Settings interface. The breadcrumb path is "System Settings > Templates". The page title is "Templates". In the top right corner, there are buttons for "IMPORT" and "+ NEW TEMPLATE". Below the title, there is a search bar labeled "Search templates" and a "Show: All" dropdown menu. The main content is a table of "Email Templates (18)". The table has columns for Name, Description, Type, Hierarchy, and Status. The "Templates" menu item in the left sidebar is highlighted with a red box.

Name	Description	Type	Hierarchy	Status
zzDarekEEtest	zzDarekEEtest	Employee	High Tech Staffing	Active
Welcome Letter	Welcome letter FOR new employees	Employee	System	Active
Updating Paperwork	Updating Paperwork	Employee	High Tech Staffing	Active
Skill Marketing	Sending resumes	Contact	System	Active
Sales Leads	Used for emailing new leads	Contact	High Tech Staffing	Active
New Hire Packet	New Hire Packet	Employee	High Tech Staffing	Active
John's Kavaliro Test Template	New Hire Documentation	Employee	High Tech Staffing	Active

Select the 'Import' option at the top right:

System Settings > Templates

System Settings

Advanced Search

External Service

Insight Widgets

Job Board

Product Instances

Security Groups

Service Rep Teams

Service Representatives

System Email

Templates

Templates

Search templates

IMPORT + NEW TEMPLATE

Last Import from Enterprise: 06/08/21, 10:07 AM

Email Templates (18)

Show: All

<input type="checkbox"/>	Name ↓	Description	Type	Hierarchy	Status	
<input type="checkbox"/>	zzDerekEEtest	zzDerekEEtest	Employee	High Tech Staffing	Active	⋮
<input type="checkbox"/>	Welcome Letter	Welcome letter FOR new employees	Employee	System	Active	⋮
<input type="checkbox"/>	Updating Paperwork	Updating Paperwork	Employee	High Tech Staffing	Active	⋮
<input type="checkbox"/>	Skill Marketing	Sending resumes	Contact	System	Active	⋮
<input type="checkbox"/>	Sales Leads	Used for emailing new leads	Contact	High Tech Staffing	Active	⋮
<input type="checkbox"/>	New Hire Packet	New Hire Packet	Employee	High Tech Staffing	Active	⋮

Within the Import from Enterprise window, you will have the option to do the following:

- Select to either import email templates with the type of employee, contact, assignment, or all three.
- Select whether or not to only import active email templates from Enterprise.

Import from Enterprise

1 Select ————— 2 Review

Select templates to import

Template Type

All

All

Assignment

Contact

Employee

Import from Enterprise

1 Select ————— 2 Review

Select templates to import

Template Type

All

Import active templates only

CANCEL NEXT >

Once you have selected your preferred options for the import, select 'Next'.

You will now be shown a window that contains all of the found email templates from Enterprise that can be imported into Beyond:

Import from Enterprise

Select
 2 Review

Templates found (16):

0 new templates

16 duplicate templates. These templates already exist in Beyond.

Select duplicates to import:

<input type="checkbox"/>	Name (Enterprise)	Description (Enterprise)	Name (Beyond)	Description (Beyond)
<input type="checkbox"/>	A Race Car Email Blast	A Race Car Email Blast	A Race Car Email Blast	A Race Car Email Blast
<input type="checkbox"/>	A Race Car Email Blast Contact	A Race Car Email Blast sent to cont...	A Race Car Email Blast Contact	A Race Car Email Blast sent to contacts
<input type="checkbox"/>	Aaron Test	link test	Aaron Test	link test
<input type="checkbox"/>	alexemployeeetest	alexemployeeetest	alexemployeeetest	alexemployeeetest

If you include duplicates in the import they will be replaced with copies from Enterprise.

CANCEL < PREVIOUS IMPORT 0 TEMPLATES

Within this window, you will see the following:

- The number of new email templates that currently do not exist within Beyond.
- The number of duplicate email templates that currently exist within Beyond.

At this point, you are able to select the email templates you wish to import from Enterprise into Beyond.

Note As the label states within the window, any duplicates included within the import will replace the copy that currently exists within Beyond, with what currently exists in Enterprise.

Once you have selected the email templates you wish to import, select the 'Import Templates' option at the lower right of the window:

Import from Enterprise

1 Select 2 Review

Templates found (16):

0 new templates

16 duplicate templates. These templates already exist in Beyond.

Select duplicates to import:

<input checked="" type="checkbox"/>	Name (Enterprise)	Description (Enterprise)	Name (Beyond)	Description (Beyond)
<input checked="" type="checkbox"/>	A Race Car Email Blast	A Race Car Email Blast	A Race Car Email Blast	A Race Car Email Blast
<input checked="" type="checkbox"/>	A Race Car Email Blast Contact	A Race Car Email Blast sent to cont...	A Race Car Email Blast Contact	A Race Car Email Blast sent to contacts
<input checked="" type="checkbox"/>	Aaron Test	link test	Aaron Test	link test
<input checked="" type="checkbox"/>	alexemployeetest	alexemployeetest	alexemployeetest	alexemployeetest

If you include duplicates in the import they will be replaced with copies from Enterprise.

CANCEL < PREVIOUS **IMPORT 16 TEMPLATES**

Once the import option has been selected, you will be navigated back to the Templates screen with an 'Import in Progress' status shown.

The screenshot shows the 'System Settings > Templates' page. The main content area displays a large blue circular loading icon with the text 'Import in progress' and 'This might take several minutes. Please check back in a bit.' Below this, it says 'Last import from Enterprise: In progress'. The left sidebar contains a list of system settings categories, with 'Templates' selected at the bottom.

Note This import process could take several minutes depending on the amount of email templates that are being imported from Enterprise. While the import process takes place, you are able to navigate away from this window and proceed with other tasks within Beyond.

When the import process is complete, you are able to navigate back to B Menu > System Settings > Templates and see that all of the email templates have successfully been imported from Enterprise.

In the event you want to know when the last successful import of email templates from Enterprise took place, you

can see this information at the top right of the page:

System Settings > Templates

System Settings

Templates

IMPORT + NEW TEMPLATE

Last Import from Enterprise: 05/08/21, 1:04 PM

Search templates

Email Templates (18)

Show: All

Name	Description	Type	Hierarchy	Status
zzDerekEEtest	zzDerekEEtest	Employee	High Tech Staffing	Active
Welcome Letter	Welcome letter FOR new employees	Employee	System	Active
Updating Paperwork	Updating Paperwork	Employee	High Tech Staffing	Active
Skill Marketing	Sending resumes	Contact	System	Active
Sales Leads	Used for emailing new leads	Contact	High Tech Staffing	Active
New Hire Packet	New Hire Packet	Employee	High Tech Staffing	Active
John's Kavaliro Test Template	New Hire Documentation	Employee	High Tech Staffing	Active

Note The following Data Fields are not supported within Beyond email templates:

Field Name	Field Name (Within Employee Template)	Field Name (Within Contact Template)
Secure Query String	##Recipient.employee.SecureQueryString##	##Recipient.contact.SecureQueryString##
Branch ID	##Recipient.employee.BranchID##	NA
SSN	##Recipient.employee.SSN##	NA
Employee Avatar	##image.emp.avatar##	NA
Custom 1	##Recipient.employee.Custom1##	##Recipient.contact.Custom1##
Custom 2	##Recipient.employee.Custom2##	NA

In the event one of the above fields were being utilized in an Enterprise email template that has been imported into Beyond, the field will need to be manually removed from within the Beyond email template.

This can be done by selecting the 'Edit Template' option within the three dot menu to the right of the email template:

System Settings > Templates

System Settings

Templates

IMPORT + NEW TEMPLATE

Last Import from Enterprise: 05/08/21, 1:04 PM

Search: This is a Test Email

Email Templates (19)

1 selected template Clear Selection

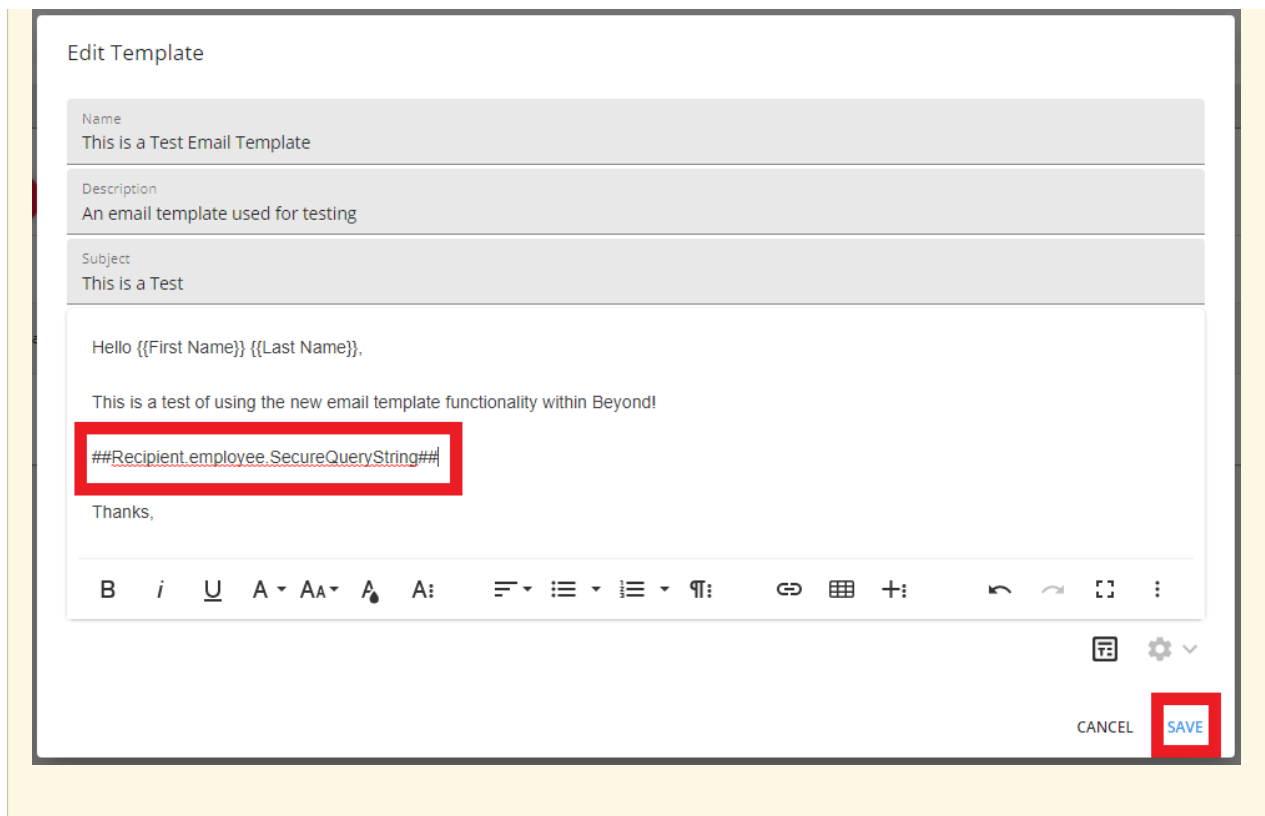
Show: All

Name	Description	Type	Hierarchy	Status
This is a Test Email Template	An email template used for testing	Employee	High Tech SW	Active

Rows per page: 20

- Edit Template
- Duplicate
- Compose From Template
- Change Settings
- Delete

Within the Edit Template window, remove the Field Name from the email template and select 'Save' once complete:



With the email templates imported from Enterprise, you are now ready to dive into the other email template functionality that Beyond has to offer. Please see the following articles on additional Beyond email template information:

- [Beyond - How to Create Email Templates](#)
- [Beyond - How to Utilize Email Templates](#)
- [Beyond - How to Manage Email Templates](#)

Related Articles