Beyond - How to Manage Email Templates

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How to Manage Email Templates in Beyond

There are many options at your disposal when managing email templates within Beyond including:

- Searching and filtering templates by names and statuses
- Updating template status and hierarchy settings
- Editing templates
- Duplicating templates
- Deleting templates

The above options are accessible 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.

Searching and Filtering Templates

Depending on the amount of email templates that you have within your system, there are searching and filtering options to assist in finding the templates you need:

B < Settings / <u>System Set</u>	<u>tings</u> / Te	emplates					
Job Titles	Templa	ates					IMPORT + NEW TEMPLATE Last import from Enterprise: 02/05/24, 8:51 AM
On-Site Time Clock Invite Codes	Q	Search templates					
Organization	Emai	il Templates (10)					Show: All 👻
Organizations		Name 🛧	Description	Туре	Hierarchy	Status	
Product Instances		All Assignment fields template	All Assignment fields template	Assignment	System	\otimes	:
Proofing Error Management		Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\otimes	:
Required Document Types		Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\otimes	:
Sales Teams		Format template fields	Format template fields	Assignment	System	\otimes	:
Security 🗸 🗸		Skill Marketing	Sending resumes	Contact	Sub System High Tech	\otimes	:
Service Rep Teams		Test Template for Contacts	Test Template for Contacts	Contact	Sub System High Tech	\otimes	:
Service Representatives		Test Template for Employees	Test Template for Employees	Employee	Sub System High Tech	\otimes	:
Services 🗸		Welcome Letter	Welcome letter FOR new employees	Employee	Sub System High Tech	$(\!\!\!\times\!)$:
System Email 🗸 🗸		zzactive	active	Assignment	Sub System High Tech	\otimes	:
Templates		zzMass Mailing Automation DO NOT EDIT	QA Employee Test with all the data field	Employee	System	\otimes	:

When searching for email templates within the Templates window, you are able to search on the following:

Name

- Description
- Type (Employee, Contact, or Assignment)

When filtering email templates within the Templates window, you are able to filter on the following:

- All
- Active
- Inactive

Updating Template Settings

Once an email template is no longer needing to be used, but not necessarily deleted forever, it can be deactivated.

Begin by selecting the 'Change Settings' option within the three dot menu to the right of the email template you want to modify:

B < Settings / <u>System Se</u>	<u>ttings</u> / T	emplates					
- Interest Loaes							IMPORT + NEW TEMPLATE
Job Titles	Templ	lates				Las	t import from Enterprise: 02/05/24, 8:51 AM
On-Site Time Clock Invite Codes	0	Search templates					
Organization	Ema	il Templates (10)					
Organizations		selected template V Clear Selection	on				Show: All 👻
Product Instances		Name 1	Description	Туре	Hierarchy	Status	
Proofing Error Management		All Assignment fields template	All Assignment fields template	Assignment	System	\otimes	÷
Required Document Types		Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\otimes	:
Sales Teams		Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\oslash	Edit Template
Security 🗸		Format template fields	Format template fields	Assignment	System	\odot	Duplicate Compose From Template
Service Rep Teams		Skill Marketing	Sending resumes	Contact	Sub System High Tech	\oslash	Change Settings
Service Representatives		Test Template for Contacts	Test Template for Contacts	Contact	Sub System High Tech	\oslash	Delete
Services 🗸		Test Template for Employees	Test Template for Employees	Employee	Sub System High Tech	\otimes	:
System Email		Welcome Letter	Welcome letter FOR new employees	Employee	Sub System High Tech	8	:
		zzactive	active	Assignment	Sub System High Tech	\otimes	:
Templates		77Mass Mailing Automation DO NOT FDIT	OA Employee Test with all the data field	Employee	Suctem	\bigcirc	:

Once the 'Change Settings' option has been selected, a new window will open allowing you to edit the hierarchy along with the status (active or inactive) of the email template:

\sim

Once the settings have been updated, select 'Save'.

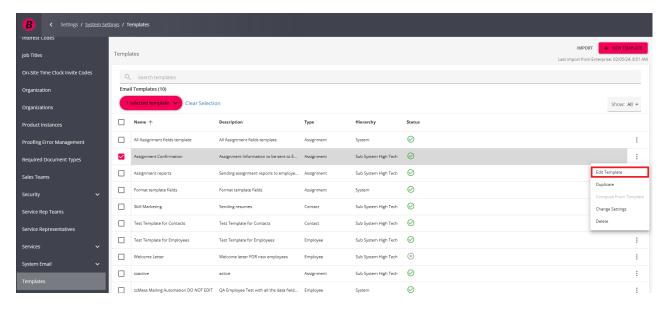
Editing Templates

Once an email template has been created, you have the option to edit said template in order to modify information.

Note In the event an email template is out of your allowed hierarchy, the 'Edit Template' button will instead appear as 'Preview'.

You can still duplicate the template you wanted to edit and edit the duplicated template instead so that it is within your allowed hierarchy.

Begin by selecting the 'Edit Template' option within the three dot menu to the right of the email template you want to modify:



Once the 'Edit Template' option has been selected, a new window will open allowing you to edit the template information by changing the name of the template, description, subject, and body information:

Edit Template
Name Assignment Confirmation
Description Assignment Information to be sent to Employee
Subject Assignment Confirmation
This is your assignment information:
{{Pay Rate}}
{{Start Date}}
{{Start Time}}
$B i \underline{U} A \star A_{\mathtt{A}} \star A_{\mathtt{A}} \exists \star \exists \star \exists \star \exists \star \P : \boxdot \blacksquare +: \bowtie \frown \Box :$
CANCEL SAVE

Once the modifications are completed, select 'Save' at the bottom right.

Duplicating Templates

Email templates in Beyond are able to be duplicated to allow for easier configurability instead of having to create templates from scratch, every time.

Duplicating Email Templates Individually

Begin by selecting the 'Duplicate' option within the three dot menu to the right of the email template you want to copy:

B < Settings / Sys	tem Set	<u>ings</u> / Te	emplates					
-interest codes								
Job Titles		Templa	ites					IMPORT + NEW TEMPLATE Last import from Enterprise: 02/05/24, 8:51 AM
On-Site Time Clock Invite Codes		Q	Search templates					
Organization		Emai	l Templates (10)					
Organizations			selected template 🗸 Clear Selection	on				Show: All 👻
Product Instances			Name 🛧	Description	Туре	Hierarchy	Status	
Proofing Error Management			All Assignment fields template	All Assignment fields template	Assignment	System	\otimes	:
Required Document Types			Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\otimes	:
Sales Teams			Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\otimes	Edit Template
Security	~		Format template fields	Format template fields	Assignment	System	\otimes	Duplicate Compose From Template
Service Rep Teams			Skill Marketing	Sending resumes	Contact	Sub System High Tech	\otimes	Change Settings
Service Representatives			Test Template for Contacts	Test Template for Contacts	Contact	Sub System High Tech	\otimes	Delete
Services	~		Test Template for Employees	Test Template for Employees	Employee	Sub System High Tech	\otimes	:
System Email	~		Welcome Letter	Welcome letter FOR new employees	Employee	Sub System High Tech	\otimes	:
Templates			zzactive	active	Assignment	Sub System High Tech	\otimes	:
Topant			zzMass Mailing Automation DO NOT EDIT	QA Employee Test with all the data field	Employee	System	\otimes	:

Once the 'Duplicate' option is selected, you will now see the original and the duplicated email template within the list. The duplicate template will default to an inactive status:

B < Settings / <u>System Set</u>	tings / Te	emplates							
Interest Loaes									
Job Titles	Templa	ates					IMPORT + NEW TEMPLATE Last import from Enterprise: 02/05/24, 8:51 AM		
On-Site Time Clock Invite Codes	Q	Search templates							
Organization	Email Templates (11)								
Organizations		1 selected template V Clear Selection							
Product Instances		Name 个	Description	Туре	Hierarchy	Status			
Proofing Error Management		All Assignment fields template	All Assignment fields template	Assignment	System	\oslash	÷		
Required Document Types		Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\odot	1		
Sales Teams		Assignment Confirmation (Copy)	Assignment Information to be sent to E	Assignment	High Tech Internal	\otimes	:		
Security 🗸		Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\oslash	÷		
Service Rep Teams		Format template fields	Format template fields	Assignment	System	\oslash	:		
Service Representatives		Skill Marketing	Sending resumes	Contact	Sub System High Tech	\oslash	:		
Services 🗸		Test Template for Contacts	Test Template for Contacts	Contact	Sub System High Tech	\oslash	÷		
System Email		Test Template for Employees	Test Template for Employees	Employee	Sub System High Tech	\oslash	:		
Templates		Welcome Letter	Welcome letter FOR new employees	Employee	Sub System High Tech	\otimes	:		
remplates		zzactive	active	Assignment	Sub System High Tech	\bigcirc	:		

Duplicating Email Templates En Masse

Begin by selecting the email templates you want to duplicate by checking the box for each:

B < Settings / System Set		emplates						
Job Titles	Templa	ates					IMPORT + NEW TEN	
On-Site Time Clock Invite Codes	Q	Search templates				L	ast import from Enterprise: 02/05/24	4, 8:51 AM
Organization	anization Email Templates (10)							
Organizations	3	selected templates 🗸 Clear Selec	tion				Show: A	All 👻
Product Instances		Name 个	Description	Туре	Hierarchy	Status		
Proofing Error Management		All Assignment fields template	All Assignment fields template	Assignment	System	${\boldsymbol{ \oslash}}$:
Required Document Types		Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\otimes		:
Sales Teams		Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\otimes		:

With the email templates chosen, select the drop down within the '# selected templates' button and select 'Duplicate':

B < Settings / <u>System Se</u>	ttings / Templates						
-Interest Codes							
Job Titles	ob Titles Templates						
On-Site Time Clock Invite Codes	Q Search templates						
Organization	Email Templates (10)						
Organizations	3 selected templates 🗸 Clear Sele	ction				Show: All 👻	
Product Instances	[Delete ↑ Duplicate	Description	Туре	Hierarchy	Status		
Proofing Error Management	nment fields template	All Assignment fields template	Assignment	System	\otimes	÷	
Required Document Types	Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\odot	÷	
Sales Teams	Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\odot	:	

A confirmation window will appear, asking whether or not you want to duplicate the selected number of email templates:



Select the 'Duplicate' option and you will now see the original and the duplicated email template within the list. The duplicate template will default to an inactive status:

B < Settings / <u>System S</u>	Settings / 1	Templates					
Job Titles	Temp	lates					IMPORT + NEW TEMPLA
On-Site Time Clock Invite Codes	C	C Search templates					
Organization	Ema	all Templates (13)					
Organizations		selected templates 🔶 Clear Sele	ction				Show: All 👻
Product Instances		Name 🛧	Description	Туре	Hierarchy	Status	
Proofing Error Management		All Assignment fields template	All Assignment fields template	Assignment	System	Ø	:
Required Document Types		All Assignment fields template (Copy)	All Assignment fields template	Assignment	High Tech Internal	\otimes	:
Sales Teams		Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\oslash	:
Security 🗸 🗸		Assignment Confirmation (Copy)	Assignment Information to be sent to E	Assignment	High Tech Internal	\otimes	:
Service Rep Teams		Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\oslash	:
Service Representatives		Assignment reports (Copy)	Sending assignment reports to employe	Assignment	High Tech Internal	\otimes	:

Deleting Templates

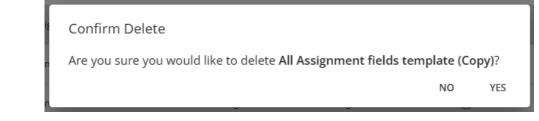
In the event an email template is no longer needed within Beyond, it can be deleted.

Deleting Email Templates Individually

Begin by selecting the 'Delete' option within the three dot menu to the right of the email template you want to delete:

B < Settings / <u>Syster</u>	m Settings /	Templates					
Interest Lodes							
Job Titles	Temp	lates					Last Import from Enterprise: 02/05/24, 8:51 /
On-Site Time Clock Invite Codes							Last import nom their prise, our of the
		A Search templates					
Organization							
Organizations		Selected template Clear Select	lon				Show: All 👻
Product Instances		Name 🛧	Description	Туре	Hierarchy	Status	
Proofing Error Management		All Assignment fields template	All Assignment fields template	Assignment	System	\odot	:
Required Document Types		All Assignment fields template (Copy)	All Assignment fields template	Assignment	High Tech Internal	\otimes	:
Sales Teams		Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\odot	Edit Template
Security ~	, 🗆	Assignment Confirmation (Copy)	Assignment Information to be sent to E	Assignment	High Tech Internal	(\times)	Duplicate
Service Rep Teams		Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\odot	Change Settings
Service Representatives		Assignment reports (Copy)	Sending assignment reports to employe	Assignment	High Tech Internal	\otimes	Delete
Services ~		Format template fields	Format template fields	Assignment	System	\odot	:
System Email		Skill Marketing	Sending resumes	Contact	Sub System High Tech	\otimes	:
Templates		Test Template for Contacts	Test Template for Contacts	Contact	Sub System High Tech	\otimes	:
rempiates		Tart Tamplata for Employear	Tast Tamplata for Employeer	Employee	Sub Surtan Minh Tach	\bigcirc	:

Once the 'Delete' option has been selected, you will be prompted with a window to confirm that you want to delete the template:



Select 'Yes' to confirm the deletion of the email template. The Templates page will reload and the deleted email template will be removed from the list.

Note Once an email template is deleted from Beyond, there is no way to bring it back.

Deleting Email Templates En Masse

Begin by selecting the email templates you want to delete by checking the box for each:

B < Settings / System Se	<u>ettings</u> / T	emplates					
Interest Codes							IMPORT + NEW TEMPLATE
Job Titles	Templ	ates					Last import from Enterprise: 02/05/24, 8:51 AM
On-Site Time Clock Invite Codes	0	Search templates					
Organization	Ema	il Templates (12)					
Organizations	2	selected templates 🗸 Clear Selec	ction				Show: All 👻
Product Instances		Name 个	Description	Туре	Hierarchy	Status	
Proofing Error Management		All Assignment fields template	All Assignment fields template	Assignment	System	\otimes	:
Required Document Types		Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\odot	:
Sales Teams		Assignment Confirmation (Copy)	Assignment Information to be sent to E	Assignment	High Tech Internal	\otimes	:
Security 🗸		Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\otimes	:
Service Rep Teams		Assignment reports (Copy)	Sending assignment reports to employe	Assignment	High Tech Internal	8	:
Service Representatives		Format template fields	Format template fields	Assignment	System	\otimes	:

With the email templates chosen, select the drop down within the '# selected templates' button and select 'Delete':

B < Settings / <u>System</u>						
Job Titles	Templates					IMPORT + NEW TEMPLATE Last import from Enterprise: 02/05/24, 8:51
Dn-Site Time Clock Invite Codes	Q Search templates					
rganization	Email Templates (12)					
Irganizations	2 selected templates 🗸 Clear	Selection				Show: All 👻
Product Instances		Description	Туре	Hierarchy	Status	
roofing Error Management	Duplicate	All Assignment fields template	Assignment	System	\otimes	1
equired Document Types	Assignment Confirmation	Assignment Information to be sent to E	Assignment	Sub System High Tech	\otimes	i
ales Teams	Assignment Confirmation (Copy)	Assignment Information to be sent to E	Assignment	High Tech Internal	\otimes	1
ecurity 🗸 🗸	Assignment reports	Sending assignment reports to employe	Assignment	Sub System High Tech	\otimes	1
ervice Rep Teams	Assignment reports (Copy)	Sending assignment reports to employe	Assignment	High Tech Internal	\otimes	:
iervice Representatives	Format template fields	Format template fields	Assignment	System	\otimes	:

A confirmation window will appear, asking whether or not you want to delete the selected number of email templates:



Select 'Delete' to confirm the deletion of the selected email templates. The Templates page will reload and the deleted email template will be removed from the list.

Note Once an email template is deleted from Beyond, there is no way to bring it back.

You have now successfully managed email templates in Beyond!

For more information on email templates in Beyond, please see the following Knowledge Base articles:

- Beyond How to Create Email Templates
- Beyond How to Utilize Email Templates
- Beyond How to Import Email Templates from Enterprise

Related Articles