

Beyond - How to Create Email Templates

Last Modified on 04/18/2024 3:37 pm CDT

How to Create Email Templates in Beyond

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

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.

For more information on this import functionality, please see the article for [Beyond - How to Import Email Templates from Enterprise](#).

How to Create Email Templates in Beyond

Begin by navigating to the B Menu > System Settings > Templates:

The screenshot shows the 'Templates' page in the Beyond system. The left sidebar contains a navigation menu with 'System Email' expanded to show 'Templates'. The main content area displays a table of 10 email templates. At the top right, there are buttons for 'IMPORT' and '+ NEW TEMPLATE'. Below the table, there is a search bar and a 'Show: All' dropdown menu.

<input type="checkbox"/>	Name ↑	Description	Type	Hierarchy	Status	
<input type="checkbox"/>	All Assignment fields template	All Assignment fields template	Assignment	System	✓	⋮
<input type="checkbox"/>	Assignment Confirmation	Assignment Information to be sent to E...	Assignment	Sub System High Tech	✓	⋮
<input type="checkbox"/>	Assignment reports	Sending assignment reports to employe...	Assignment	Sub System High Tech	✓	⋮
<input type="checkbox"/>	Format template fields	Format template fields	Assignment	System	✓	⋮
<input type="checkbox"/>	Skill Marketing	Sending resumes	Contact	Sub System High Tech	✓	⋮
<input type="checkbox"/>	Test Template for Contacts	Test Template for Contacts	Contact	Sub System High Tech	✓	⋮
<input type="checkbox"/>	Test Template for Employees	Test Template for Employees	Employee	Sub System High Tech	✓	⋮
<input type="checkbox"/>	Welcome Letter	Welcome letter FOR new employees	Employee	Sub System High Tech	✗	⋮
<input type="checkbox"/>	zactive	active	Assignment	Sub System High Tech	✓	⋮
<input type="checkbox"/>	zMass Mailing Automation DO NOT EDIT	QA Employee Test with all the data field...	Employee	System	✓	⋮

Select the "New Template" option at the top right:

Settings / System Settings / Templates

IMPORT **NEW TEMPLATE**
Last Import from Enterprise: 02/05/24, 8:51 AM

Search templates

Email Templates (10) Show: All

<input type="checkbox"/>	Name ↑	Description	Type	Hierarchy	Status	
<input type="checkbox"/>	All Assignment fields template	All Assignment fields template	Assignment	System	✔	⋮
<input type="checkbox"/>	Assignment Confirmation	Assignment Information to be sent to E...	Assignment	Sub System High Tech	✔	⋮
<input type="checkbox"/>	Assignment reports	Sending assignment reports to employe...	Assignment	Sub System High Tech	✔	⋮
<input type="checkbox"/>	Format template fields	Format template fields	Assignment	System	✔	⋮
<input type="checkbox"/>	Skill Marketing	Sending resumes	Contact	Sub System High Tech	✔	⋮
<input type="checkbox"/>	Test Template for Contacts	Test Template for Contacts	Contact	Sub System High Tech	✔	⋮
<input type="checkbox"/>	Test Template for Employees	Test Template for Employees	Employee	Sub System High Tech	✔	⋮
<input type="checkbox"/>	Welcome Letter	Welcome letter FOR new employees	Employee	Sub System High Tech	⊗	⋮
<input type="checkbox"/>	zactive	active	Assignment	Sub System High Tech	✔	⋮
<input type="checkbox"/>	zMass Mailing Automation DO NOT EDIT	QA Employee Test: with all the data field...	Employee	System	✔	⋮

Within the New Template window, you will have the following options:

- Select the template type that will be used (employee, contact, or assignment).
- Select the hierarchy in which the template will exist.
- Select whether or not the template will be active upon creation.

New Template

*** Template Type**
Select... ▼

Template Type is required.

*** Hierarchy**
Select... ▼

Hierarchy is required.

Active

CANCEL NEXT

Once the options are selected, select 'Next' and you will be navigated to the New Template window:

New Template

Name

* Required

Description

Subject

Compose your message...

B *i* U A ▾ AA ▾ A: ¶: +

Data Fields ✕

Insert Data Fields to auto-populate specific areas of the template.

GOT IT

▾

CANCEL CREATE

Within the New Template window, you will have the following options:

- Add a name for the email template.
- Add a description for the email template.
- Add a subject for the email template.
- Add a body to the email template with the utilization of Data Fields.

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

Field Name	Employee Template	Contact Template	Assignment Template
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
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

Note In the event you have a custom data field you would like to add within an employee or contact email template in Beyond, please contact the [TempWorks Support](#) team for assistance.

Once you have added all of the email template information, select 'Create' at the bottom left:

New Template

Name
This is a Test Email Template

Description
An email template used for testing

Subject
This is a Test

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

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

Thanks,

B *i* U **A** **AA** **A:**
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IMPORT + NEW TEMPLATE

LAST IMPORT FROM ENTERPRISE: 04/01/24, 4:17 AM

CANCEL CREATE

With the email template created, you will be able to see it within the list on the Templates screen:

Settings / System Settings / Templates
IMPORT + NEW TEMPLATE

Search: this is a test

Email Templates (34) Show: All

<input type="checkbox"/>	Name ↑	Description	Type	Hierarchy	Status	
<input type="checkbox"/>	This is a Test Email Template	An email template used for testing	Employee	High Tech NE	✔	⋮

Rows per page: 50 | 1 of 1 | < 1 >

You have now successfully created email templates in Beyond!

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

- [Beyond - How to Utilize Email Templates](#)
- [Beyond - How to Manage Email Templates](#)
- [Beyond - How to Import Email Templates from Enterprise](#)

Related Articles