

Beyond - How to Create Email Templates

Last Modified on 06/08/2021 9:59 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 or customer contacts. This means there are only two template types to create email templates from: **Employee Templates** and **Contact 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 'System Settings > Templates' page in the Beyond application. The left-hand navigation menu is visible, with 'Templates' highlighted in a red box. The main content area displays a table of 'Email Templates (18)'. The table has columns for Name, Description, Type, Hierarchy, and Status. The 'Status' column shows 'Active' for all templates. The top right of the page features an 'IMPORT' button and a '+ NEW TEMPLATE' button. The bottom right corner of the table area shows 'Last import from Enterprise: 06/08/21, 10:07 AM'.

Name	Description	Type	Hierarchy	Status
zzDarekEEest	zzDarekEEest	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 Kavalro Test Template	New Hire Documentation	Employee	High Tech Staffing	Active

Select the 'New Template' 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

Tenant Invite Codes

Templates

Search templates

Email Templates (18)

Show: All

<input type="checkbox"/>	Name ↓	Description	Type	Hierarchy	Status	
<input type="checkbox"/>	zzDarekEEtest	zzDarekEEtest	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	⋮
<input type="checkbox"/>	John's Kavaliro Test Template	New Hire Documentation	Employee	High Tech Staffing	Active	⋮

IMPORT

NEW TEMPLATE

Last import from Enterprise: 06/08/21, 1:04 PM

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

- Select the template type that will be used (employee or contact).
- 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...

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

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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
First Name	X	X
Last Name	X	X
Middle Name	X	
Street 1	X	X
Street 2	X	X
Municipality (City)	X	X
Region (State)	X	X
Postal Code	X	X
Branch Full Name	X	
Branch Phone	X	
Branch Email	X	
Branch Street 1	X	
Branch Street 2	X	

Field Name	Employee Template	Contact Template
Branch State/Region	X	
Branch Postal Code	X	
Web Username	X	
Company Name		X
Department Name		X
Employer Company 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,

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CANCEL CREATE

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

The screenshot displays the 'System Settings > Templates' interface. On the left is a sidebar with navigation items: System Settings, Advanced Search, External Service, Insight Widgets, Job Board, Product Instances, Security Groups, Service Rep Teams, Service Representatives, System Email, Templates (highlighted), and Tenant Invite Codes. The main content area is titled 'Templates' and includes an 'IMPORT' button and a '+ NEW TEMPLATE' button. A search bar contains the text 'This is a Test Email'. Below the search bar, a table titled 'Email Templates (19)' is shown with columns for Name, Description, Type, Hierarchy, and Status. One row is visible: 'This is a Test Email Template' with description 'An email template used for testing', Type 'Employee', Hierarchy 'High Tech SW', and Status 'Active'. At the bottom right of the table, it says 'Rows per page: 20' and '1 of 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