

Onboarding - How to Setup Automations

Last Modified on 10/02/2026 3:06 pm CDT

Overview

Automations run actions, like sending emails or creating tasks, when specific events happen.

This article walks you through the most common scenario, sending a welcome email to the employee every time a new placement is created.

The screenshot displays the configuration interface for an automation, divided into three main panels:

- Placement Events:** Contains fields for "Automation Name" and "Email Notification". The "Description" field states: "This sends an email when a placement is created". Under "Dependencies", there is a "Status" dropdown and a checkbox for "Run on new placement creation". The "Run Strategy" is set to "All new returns".
- condition_1:** Shows a rule configuration where "Any of the following must be true". A single condition is defined: "Name" does not contain "Candidate" (case sensitive).
- action_1:** Configured to "Create Onboarding Link". It specifies "Onboarding Link Type" as "Placement", "Assignee Type" as "Employee", and "Locale" as "Auto". It includes an "Optional URL" field for redirecting users upon completion. The "Theme" is set to "Select theme", and "Require OTP Verification" is set to "No".

The rightmost panel shows the email template configuration for "Send Email", including "Email service" (Onboarded Email Service), "Email template" (Onboarded - Content), "Theme" (No theme), "Send email to" (Employee), and "Email subject" (New Onboarded Notification). The email body contains a greeting with dynamic fields for employee name and a link to the onboarding form.

Note You will need to be a member of the "Admins" User Group to create and manage Automations.

For more information on permissions, please see the article titled [Onboarding - User Groups and Permissions](#).

Creating the Automation

Begin by navigating to the Onboarding Portal > Configurations > Automations > and select "New Automation" at the top right:

TWDemo

Dashboard

Analytics

Records

Employees

Placements

Tasks

Employers

Clients

Jobs

Integrations

Marketplace

TempWorks

Configuration

Policies

Forms

Automations

Data Mapping

Automations

Beta

New Automation

AutomationsErrors

Filter by name...

View

Name	Status	Dependencies	Rerun Strategy	Description	Events	Created
Test Automation - JDK	Draft	task.status	Allow reruns	Configuring for Documentation purposes.	0	3 hours ago
Now hiring application v2	Published	-	Allow reruns		11	1 day ago
TEST HEATHER2	Published	task.expired_at	Allow reruns		0	1 day ago
Matt Test Onboarding	Draft	task.status	Allow reruns		0	1 day ago
TEST HEATHER	Published	task.expired_at	Allow reruns		0	2 days ago
post_now_hiring_app_to_tempworks (AI #2zqndb)	Disabled	task.status	Do not allow reruns	Posts the employee's Now Hiring Application data to TempWorks upon completion.	4	2 weeks ago

Within the "Create Automation" sidebar, enter a name and description for the Automation:

Create Automation

Describe the automation in plain language. The AI will draft the blocks. Draft with AI

Name

Email Notification

Description

This sends an email when a placement is created.

Select the appropriate "Entity Type(s)", "Dependencies", and "Rerun Strategy" within the "Trigger Settings" section.

For this example, we will be selecting the following:

- **Entity Type:** Placement, as we want the email to be sent whenever a placement is created.
- **Dependencies:** Status
- **Run On New Placement Creation:** Checked
- **Rerun Strategy:** Allow reruns

Trigger Settings

Automations continuously monitor changes to certain properties of an entity. Those properties are called "dependencies". Changes to one or more dependencies will trigger this automation.

Entity Type ?

Placement

Dependencies ?

Status

☒ Run on new record creation

Rerun Strategy ?

Allow reruns

Once all of the information has been entered, select "Create":

Create Automation

Describe the automation in plain language. The AI will draft the blocks.

 Draft with AI

Name

Email Notification

Description

This sends an email when a placement is created.

Trigger Settings

Automations continuously monitor changes to certain properties of an entity. Those properties are called "dependencies". Changes to one or more dependencies will trigger this automation.

Entity Type ?

Placement

Dependencies ?

Status

☒ Run on new record creation

Rerun Strategy ?

Allow reruns

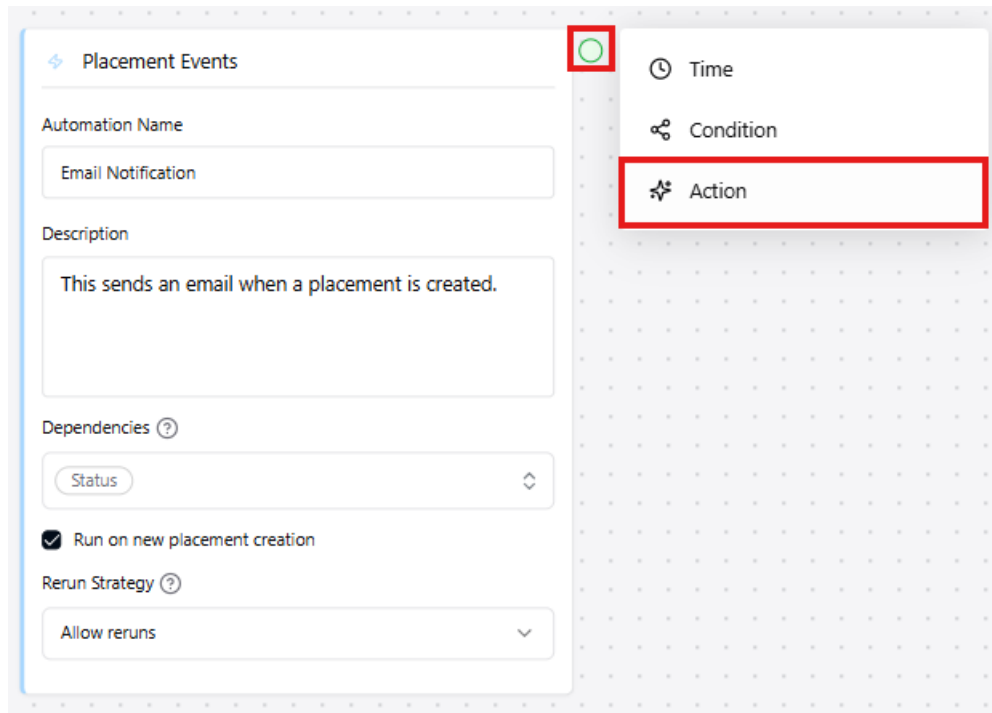
Cancel

Create

Once created, we can now add the necessary Action.

Adding an Action Node

Within the Automation Canvas, select the "O" to the right of the Start Node and select "Action" to connect an Action Node:



Within the newly created Action Node, select the following:

- **Action:** Send Email
- **Email Service:** SendGrid Account (will send from your companies configured email address)
- **Email Template:** Select the appropriate template
- **Theme:** Select the appropriate theme

Note Please keep in mind the following regarding the selecting of a theme within the Action Node:

Four theme settings reach the email, and which of them apply depends on the template. Everything else about the message including spacing, typography, and the frame, belongs to the template.

Theme Setting	Where it shows
logo	The image in the header band.
Header Background Color	The band behind the logo.
Primary Button Background Color	The call-to-action button's fill.
Primary Button Text Color	The call-to-action button's label.

A theme within the Onboarding Portal allows both a light and a dark variant. Email always renders the light

variant. If your logo is set only on the dark variant, the header band renders empty. Set a logo on the light variant of any theme you plan to use in email.

- **Send Email To:** Employee
- **Dynamic Template Data:** Can be left empty. Will populate based on the whether a selected template contains additional variables.

The screenshot shows a configuration panel for an automation action named 'action_1'. It includes several dropdown menus and text input fields. The 'Send Email' dropdown is selected. The 'Email service' dropdown is set to 'SendGrid account'. The 'Email template *' dropdown is set to 'Onboarding Link Email'. The 'Enter template ID manually' field is empty. The 'Theme ?' dropdown is set to 'TempWorks Software'. The 'Send email to' dropdown is set to 'Employee'. The 'Dynamic Template Data' field is empty. At the bottom, there is a '+ Add Template Field' button.

The automation setup is complete and is ready to be published.

Publishing the Automation

Select the "Save & Publish" option at the top right to activate the automation:

The screenshot shows the automation editor interface. On the left, there is a 'Placement Events' panel with fields for 'Automation Name', 'Email Notification', 'Description', 'Dependencies', 'Run on new placement creation', 'Run Strategy', and 'Allow reruns'. On the right, there is the 'action_1' configuration panel, which is identical to the one in the previous image. At the top right of the interface, there are buttons for 'Disable Automation', 'Save draft', and 'Save & publish'. The 'Save & publish' button is highlighted with a red box.

The "Status" badge changes from "Draft" to "Published", and the "Publish" button becomes inactive.

Note If you need to add conditional branching (like "only send this email if the placement's employment type is full-time"), you must rebuild the automation from scratch with a Condition Node added.

Condition Nodes are unable to be added to an existing published automation. Instead, save your current version, delete it, and rebuild with the Condition Node included.

Testing the Automation

To test the automation, simply create a test placement in your account. The automation should execute immediately, and the email should be sent to the employee.

Note Within the main Automations window, you can see how many times the automation executed successfully via the "Events" tab:

Automations Beta New Automation

Automations Errors

Email

Reset X

View C

Name	Status	Dependencies	Rerun Strategy	Description	Events	Created
Email Notification	Published	placement.status	Allow reruns	This sends an email when a placement is created	79962	2 months ago

Note This has been one example for how to create an automation, but the options available are vast. Try experimenting with the options available to you, and please contact TempWorks Support in the event you have any questions.

Related Articles