reach ATS®

User Guide

Managing Email Templates

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1. About Email Templates

In most organisations, many emails are sent during the recruitment process to individuals including candidates, HR recruiter, hiring managers, referees etc.

To create significant efficiencies, Reach allows pre-prepared email templates to be out at any time during the process:

- Automatically by attaching the template to a specific stage in the workflow
- Manually by the HR recruiter

Examples of templates include:

- Application received
- Interview invitations
- Regrets (*e.g. failed interview*)
- Offer letters & contracts
- Reference requests
- Internal notifications (*e.g. New Starter IT Requirements – sent to IT dept.*)

Templates are extremely versatile and can be sent to candidates, HR recruiters, hiring managers, referees, your IT department, your payroll department, or ANY person or email address that you nominate.

All of the templates are specific to your organisation and are created and amended by the HR team.

Templates are stored and managed from the **Email Library**.
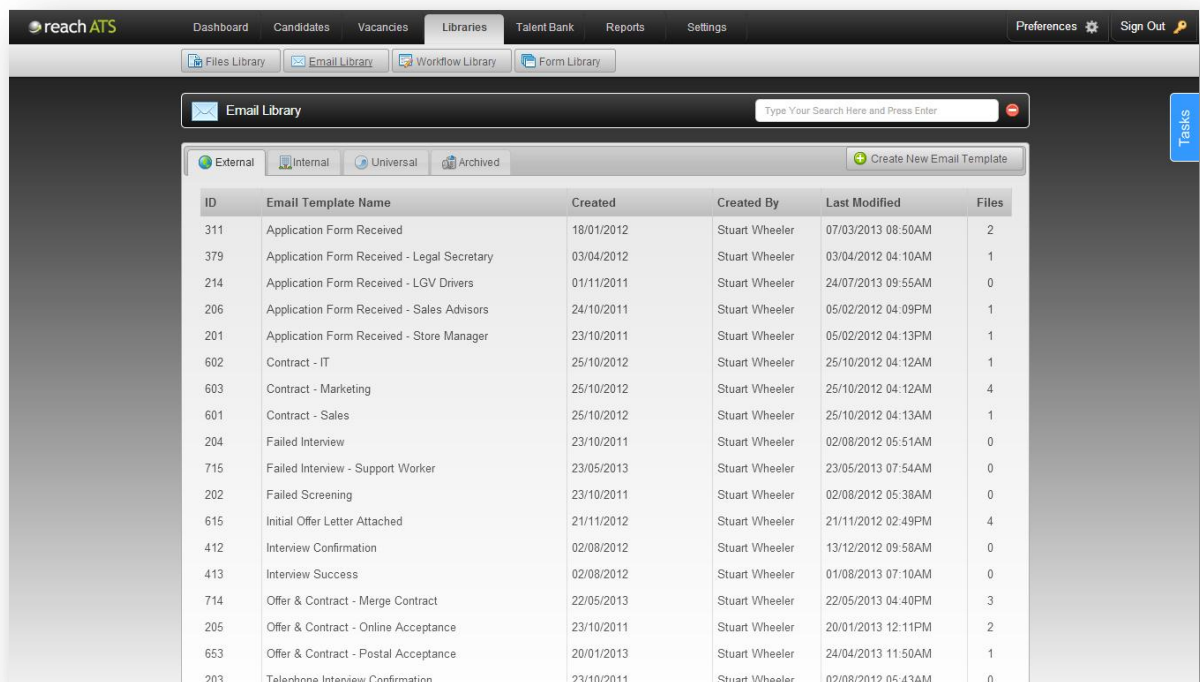
Figure 1:   Example email template
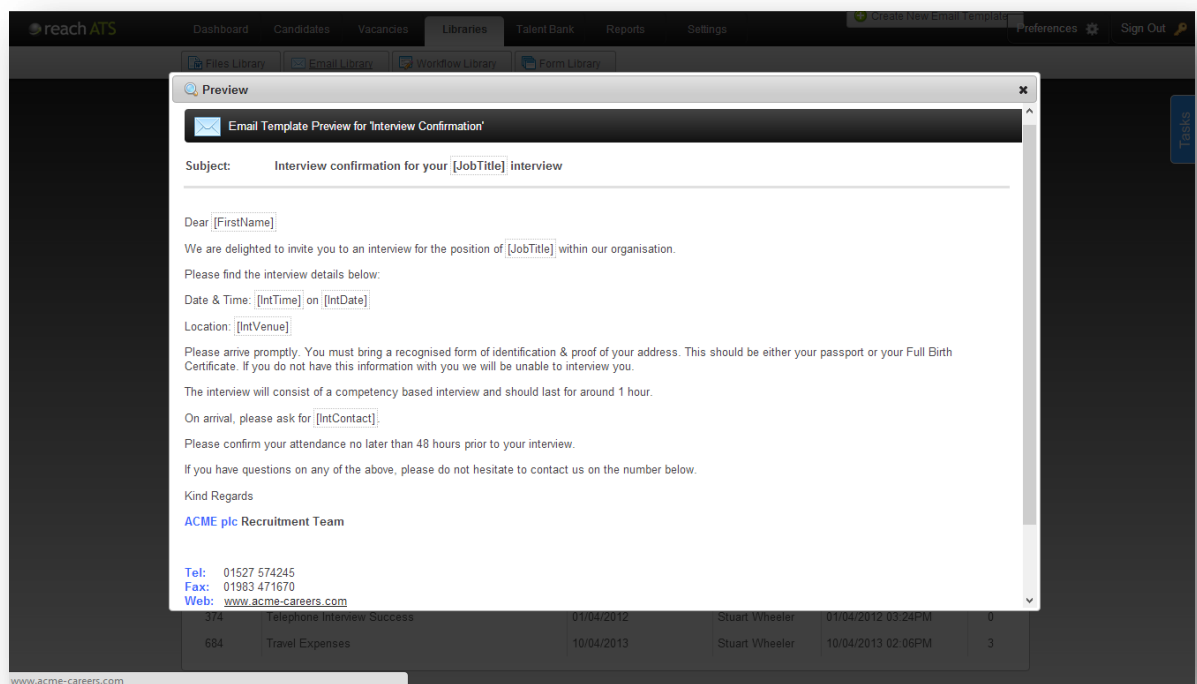
2. Email Library

The email library contains all of the templates that have been created by your organisation, organised by type.

To access the Email Library:

1. Click the **Libraries** tab
2. Click **Email Library**

Figure 2: Click Libraries to access the Email Library

The templates are organised into tabs for easy access:

- External (for emails sent to external candidates)
- Internal (for emails sent to existing employees)
- Universal (for general use emails e.g. chase incomplete application)
- Archived (templates that are no longer required for active use)

Email templates can also be sent triggered manually by the HR Administrator at any time

There are no limits on the number of email templates that can be created and stored in this library.

3. Create an Email Template

To create a new template, access the Email Library then click **Create New Email Template** and complete the following details then press **Save & Return**.

Template Details

- **Name** (*e.g. Failed Interview*)
- **Source Type** (*sets the tab for the template listing e.g. External*)
- **Search Tags** (*optional*)
- **Description** (*optional*)

Figure 3:   Add the template details

Template Content

- **To** (*select the email recipient from the pick list e.g. Candidate*)
- **Subject** (type as you wish it to appear in the recipient's Inbox)
- **Type the Content**

Type the content directly into the space provided, using the formatting tools provided where required (*e.g. bold, underline, bullet points etc.*).

Use merge tags such as [JobTitle] in your text as required. When the email is sent, the merge fields will be automatically populated. Click an item in the merge fields menu on the left hand side of the page to input the correct merge tag into your text (*e.g. clicking 'First Name' inserts* [FirstName] *into your template*).

Your organisational signature will appear at the bottom of the email by default. Please note that you can edit this signature on each template as required.

Figure 4: Add the template content

File Attachments

Any file that is stored in the File Library can be attached to an email template. Attach as many files as necessary to the template but be aware the recipient may have a limit on the size of emails that can be delivered.

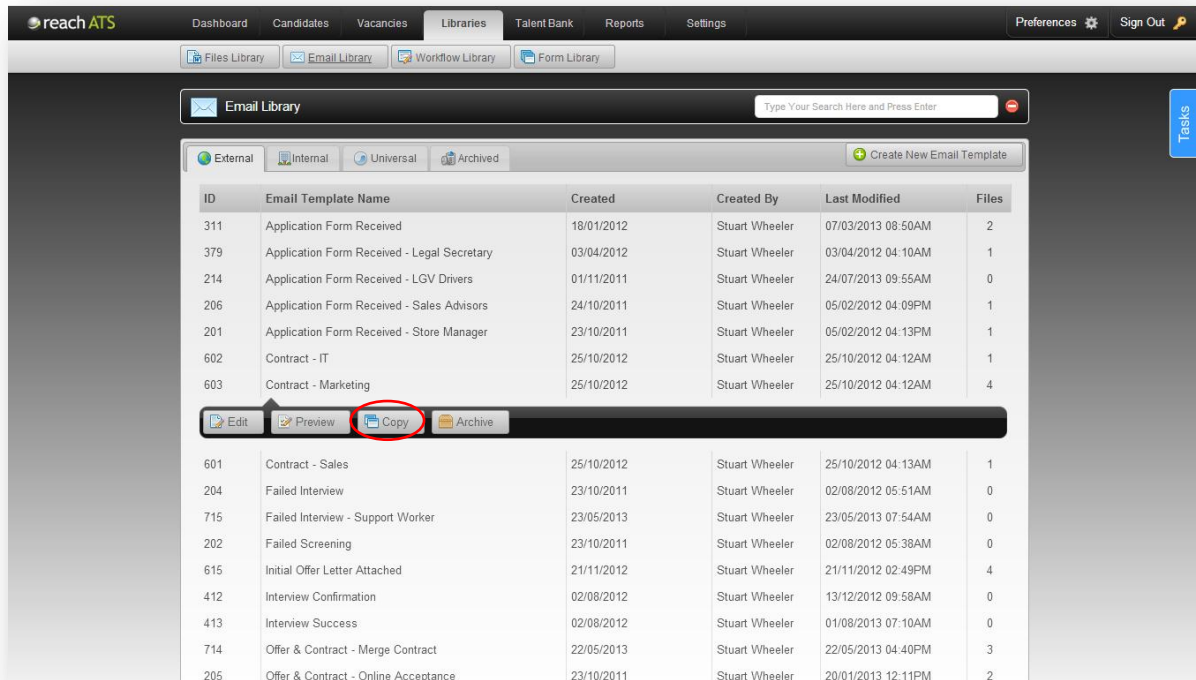*Figure 5: Attach a file to the email if required*

4. Copy an Email Template

To copy an email template:

1. Click the **Libraries** tab
2. Click **Email Library**
3. Click the template name and then **Copy**

Figure 6:   Use the Copy button to quickly create new templates

Change the name of the template and any other details (e.g. template type, content etc.) then **Save Copy & Return**.

5. Edit an Email Template

To edit an email template:

1. Click the **Libraries** tab
2. Click **Email Library**
3. Click the template name and then **Edit**

Make any necessary edits to the template details, content or file attachments and then click **Save & Return**.

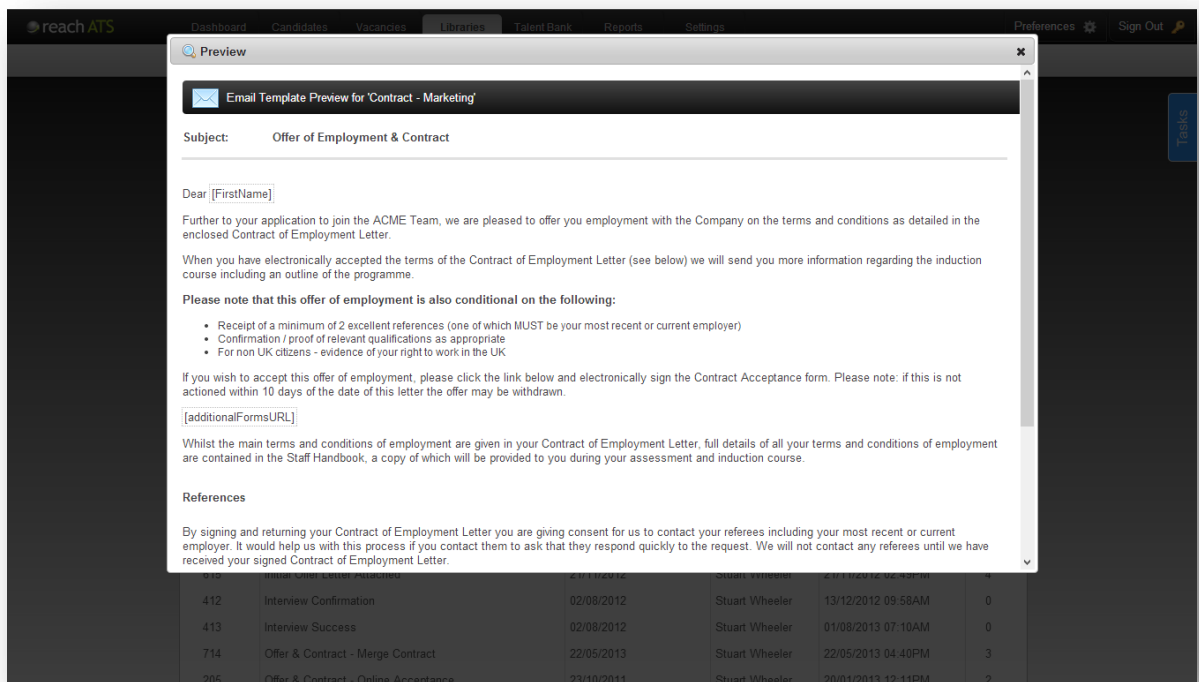The amendments will be live immediately.

6. Preview an Email Template

To preview an email template:

1. Click the **Libraries** tab
2. Click **Email Library**
3. Click the template name and then **Preview**

The email template will appear on screen for your review.

Figure 7:   Use the Preview button review the template content

7. Archive an Email Template

When a template is no longer required, use the Archive feature to keep the template listing concise.

To archive an email template:

1. Click the **Libraries** tab
2. Click **Email Library**
3. Click the template name and then **Archive**

The template can be found in the Archived tab.

Use the **Restore** button to move the template back into the active listings.

8. Automatically Send an Email Template

HR Administrators can choose to automatically trigger emails by attaching the relevant email template to a workflow stage.

Templates can be automatically triggered when a candidate:

- Enters a stage
- Is rejected from a stage
- Withdraws their application at a stage
- Completes a stage

To attach an email to a workflow stage:

1. Click **Libraries** then **Workflow Library**
2. Click the name of the workflow then **Edit**
3. Click the **Recruiter Stages** tab
4. Click **Edit** on the stage you'd like to trigger the email template(s) from
5. Click **Emails** tab then **Add**
6. Click the **Template Name** and set when the email should send (*e.g. Stage Entry*)
7. Click **Use**

The email will automatically be sent to the intended recipient whenever a candidate reaches this stage of the workflow.

Figure 8: Attach an email template to any stage in a workflow
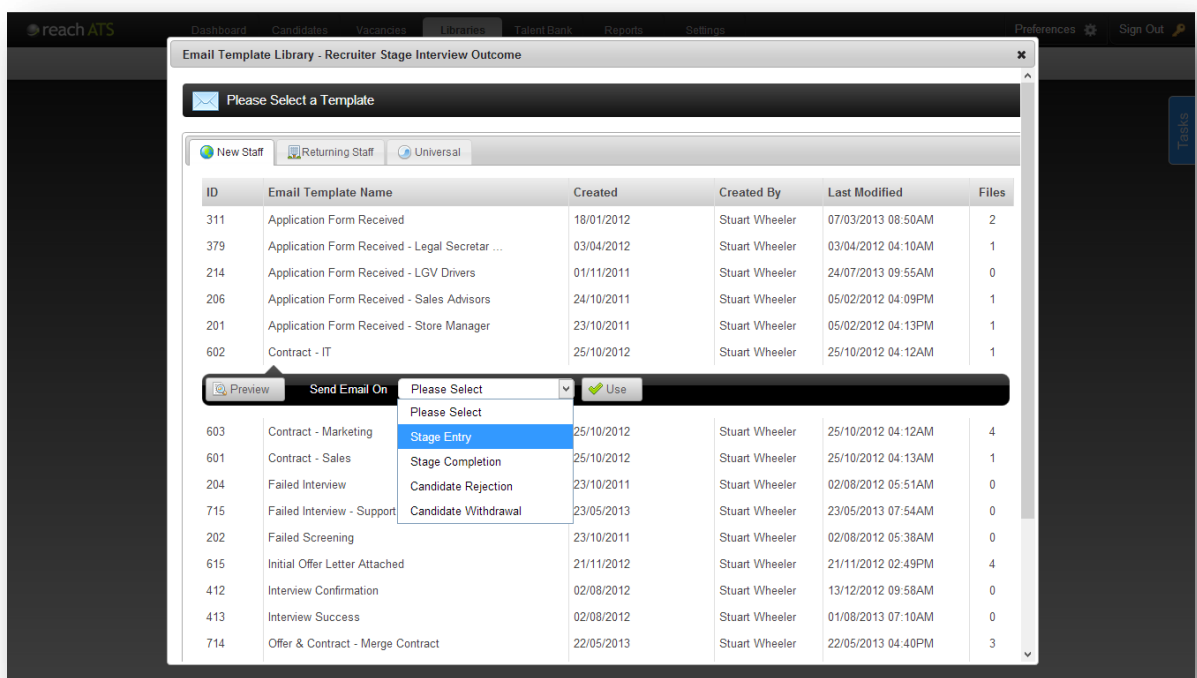
A copy of each Email can be viewed in the history tab of the candidate's record card.

## 9. Manually Send an Email Template

HR Administrators can manually send an email template to any candidate on an ad-hoc basis at any time during the recruitment process.

To manually send an email to an individual candidate

1. Click **Candidates** then select the job title
2. Click the name of the candidate you want to email from the candidate listing
3. Click **Email** from the available options
4. Click **Edit** on the stage you'd like to trigger the email template(s) from
5. Click **Template Email** tab then click the name of the email template to send
6. Click **Send this Email to the Selected Candidates**

Please note: *to compose and send an ad-hoc email, select* **Ad Hoc Email** *instead of Template Email when prompted.*

Figure 9: Manually trigger an email
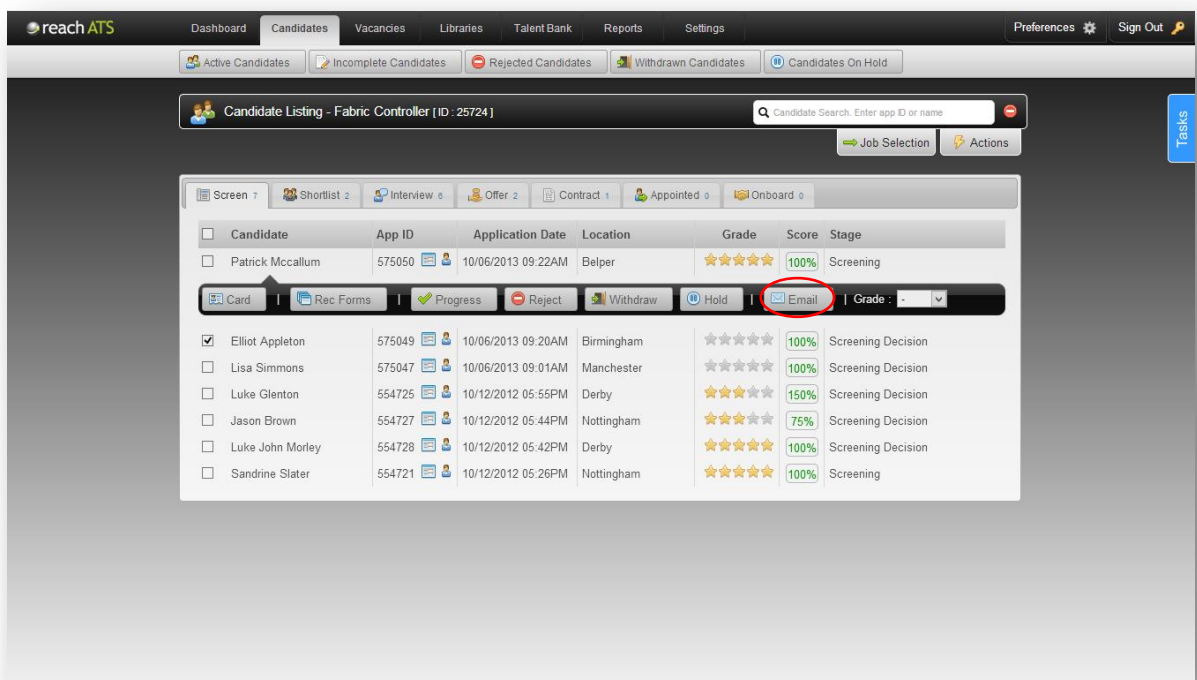
To send an ad-hoc email to multiple candidates:

1. Click **Candidates** then select the job title
2. Tick the checkbox next to each candidate's name of the individuals to email
3. Click the Actions Button
4. Click **Email** from the available options
5. Click **Template Email** tab then click the name of the email template to send
6. Click **Send this Email to the Selected Candidates**

The email will be sent to the recipient for the template for each of the selected candidates.

Figure 10:   Send emails to multiple candidates at the same time