reach ATS®

User Guide

Create a New Email Template

Prepared By: **Reach Support**

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:

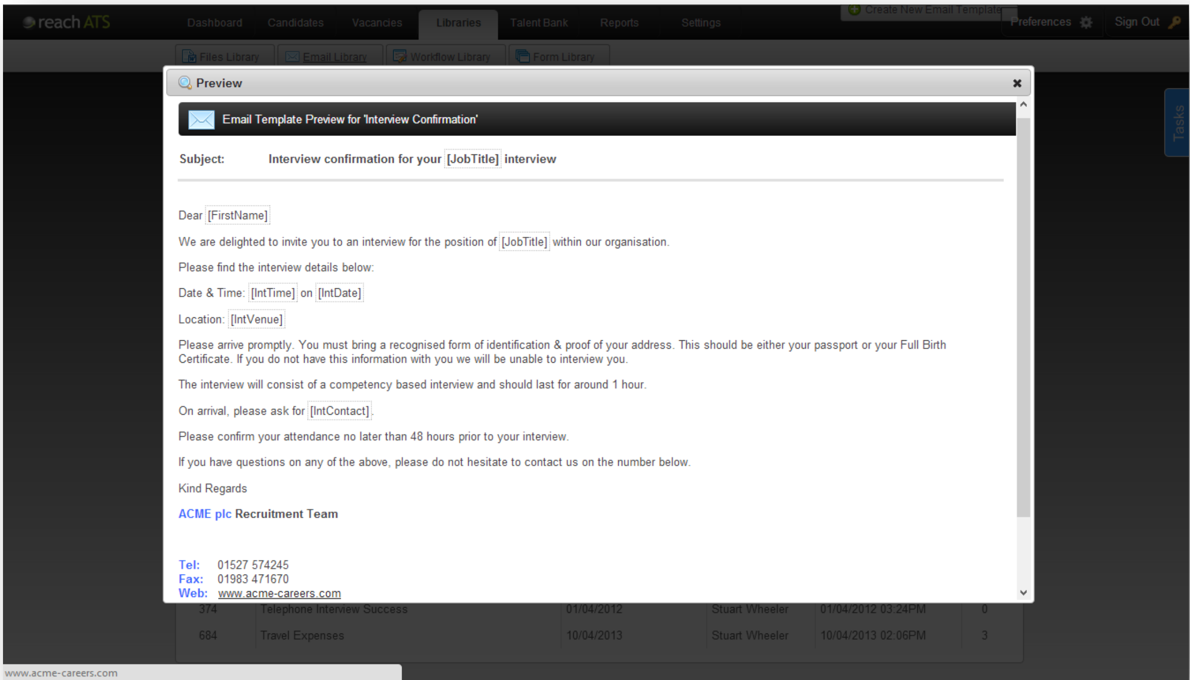
- Application received
- Interview invitations
- Regrets (*e.g. failed interview*)
- Offer letters & contracts
- Reference requests
- Internal notifications (*e.g. New Starter IT Requirements – sent to IT dept.)*

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



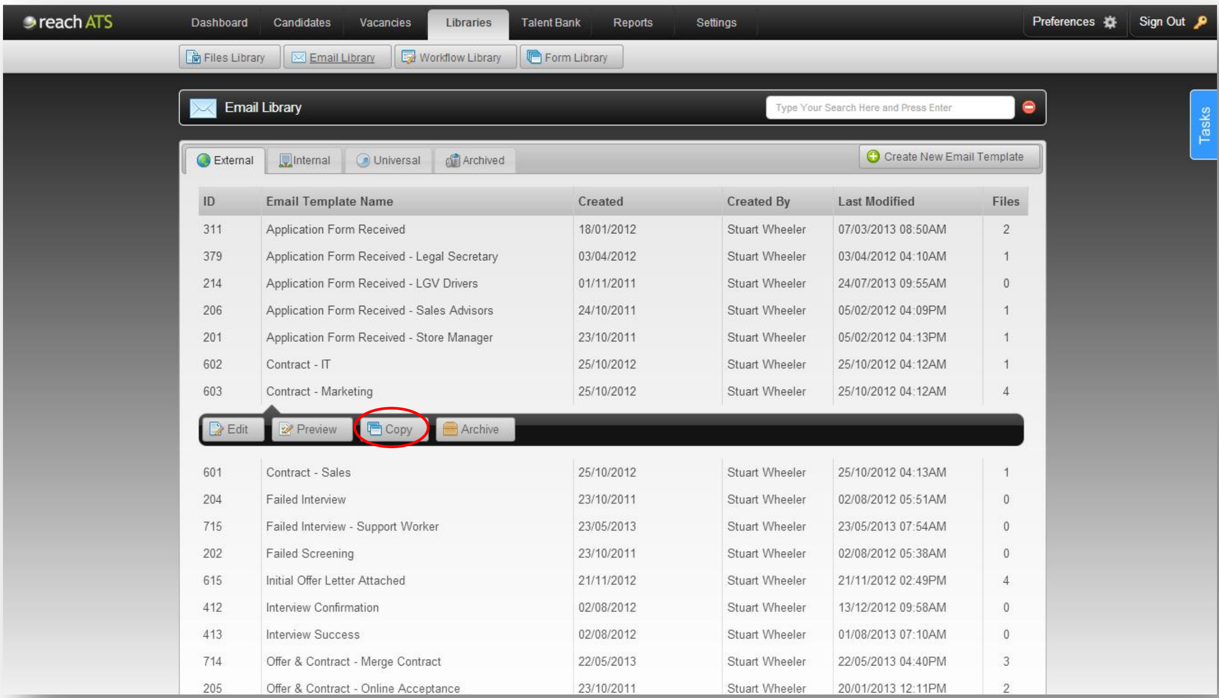
2. Copy an Email Template

Copying and renaming email templates saves valuable time.

To copy an email template:

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

Figure 2: Use the Copy button to quickly create new templates



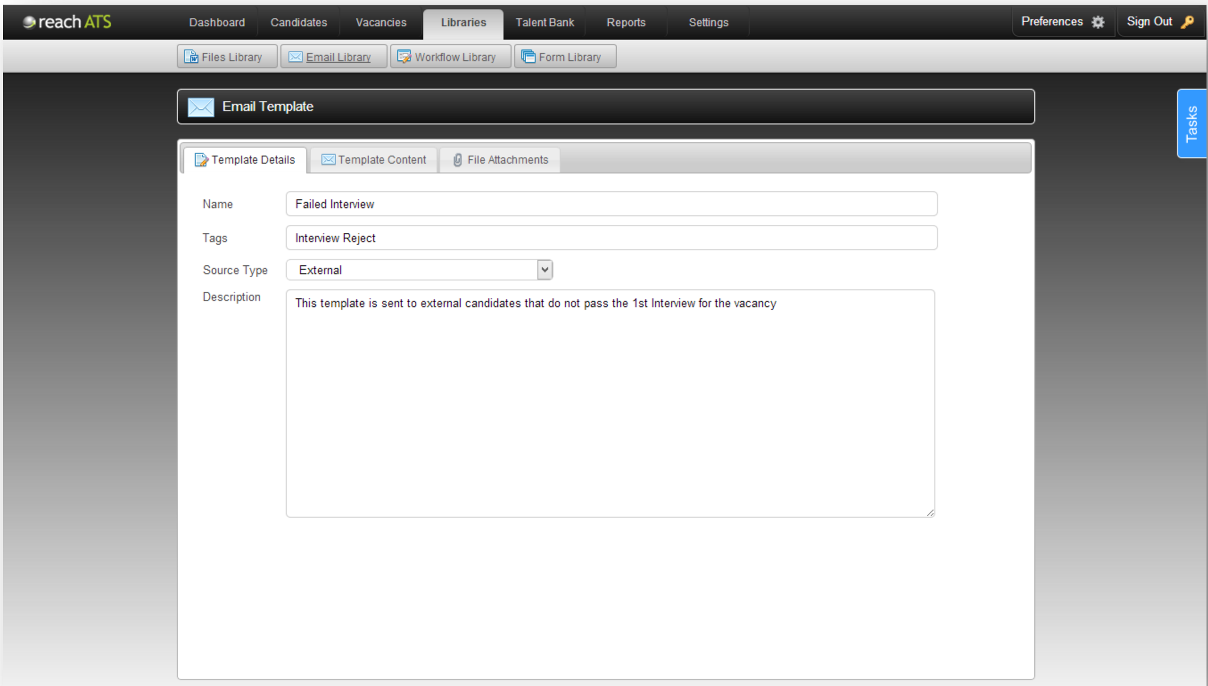
Change the name of the template and any other details (e.g. template type, content etc.) then **Save Copy & Return**.

Template Details

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

You must give the copied template a new name.

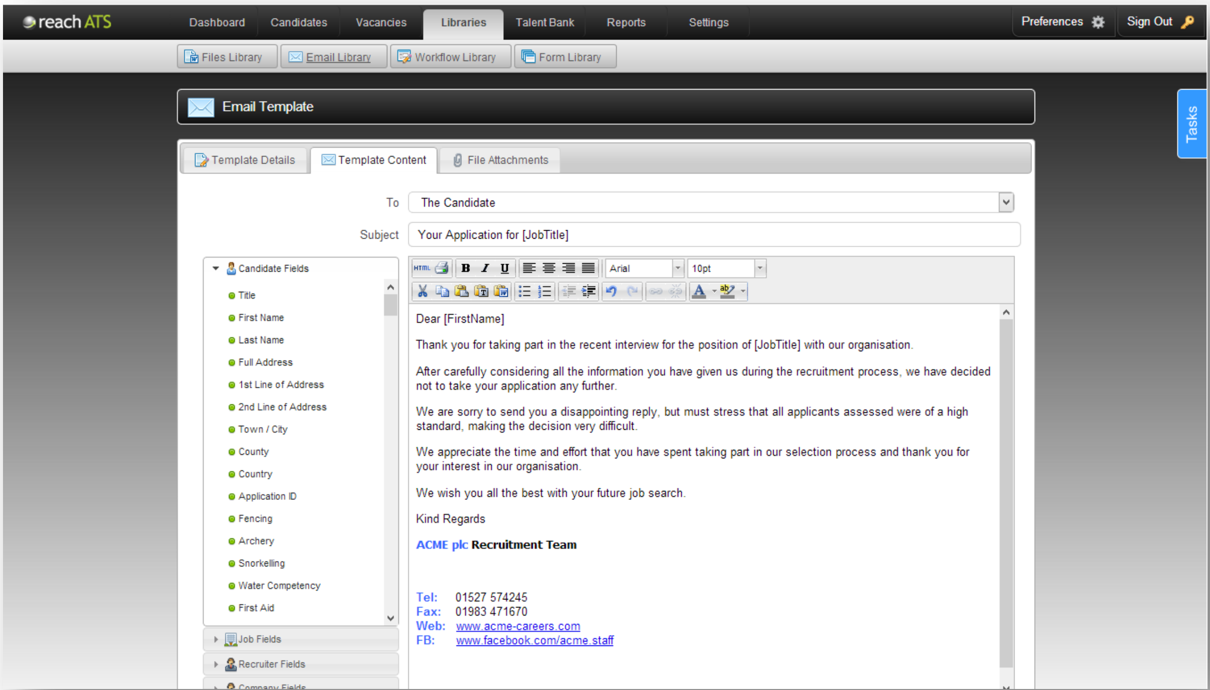
Figure 3: Give the copied template a new name



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**

Figure 4: Check and amend the template content as required



Amend the content as required 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.

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***