

# User Guide

# **Create a New Email Template**

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Strictly Commercial in Confidence





## 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.





# 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

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	Ema	Library		Type Your		
	Create New Email Template					
	ID	Email Template Name	Created	Created By	Last Modified	Files
	311	Application Form Received	18/01/2012	Stuart Wheeler	07/03/2013 08:50AM	2
	379	Application Form Received - Legal Secretary	03/04/2012	Stuart Wheeler	03/04/2012 04:10AM	1
	214	Application Form Received - LGV Drivers	01/11/2011	Stuart Wheeler	24/07/2013 09:55AM	0
	206	Application Form Received - Sales Advisors	24/10/2011	Stuart Wheeler	05/02/2012 04:09PM	1
	201	Application Form Received - Store Manager	23/10/2011	Stuart Wheeler	05/02/2012 04:13PM	1
	602	Contract - IT	25/10/2012	Stuart Wheeler	25/10/2012 04:12AM	1
	603	Contract - Marketing	25/10/2012	Stuart Wheeler	25/10/2012 04:12AM	4
	Edit	Preview Copy Archive				
	601	Contract - Sales	25/10/2012	Stuart Wheeler	25/10/2012 04:13AM	1
	204	Failed Interview	23/10/2011	Stuart Wheeler	02/08/2012 05:51AM	0
	715	Failed Interview - Support Worker	23/05/2013	Stuart Wheeler	23/05/2013 07:54AM	0
	202	Failed Screening	23/10/2011	Stuart Wheeler	02/08/2012 05:38AM	0
	615	Initial Offer Letter Attached	21/11/2012	Stuart Wheeler	21/11/2012 02:49PM	4
	412	Interview Confirmation	02/08/2012	Stuart Wheeler	13/12/2012 09:58AM	0
	413	Interview Success	02/08/2012	Stuart Wheeler	01/08/2013 07:10AM	0
	714	Offer & Contract - Merge Contract	22/05/2013	Stuart Wheeler	22/05/2013 04:40PM	3
	205	Offer & Contract - Online Accentance	23/10/2011	Stuart Wheeler	20/01/2013 12:11PM	2

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

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	Email Terr		asks	
	Template Deta	iis 🖂 Template Content 🖉 File Attachments		
	Name	Failed Interview		
	Tags	Interview Reject		
	Source Type	External	_	
	Description	This template is sent to external candidates that do not pass the 1st Interview for the vacancy		
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_				_

### 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

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	Email Template		ş.						
	Template Details 🖂 Template Content		Tas						
	File Name	File Type	Document Type	File Size Uploaded O A	bb				
	How_to_Find_Us.pdf	Adobe PDF	Location Map	107.63 KB 30/07/2012					
					_				
			-	Discard & Go Back to Listing 🛛 🖋 Save & I	Return				
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