

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:

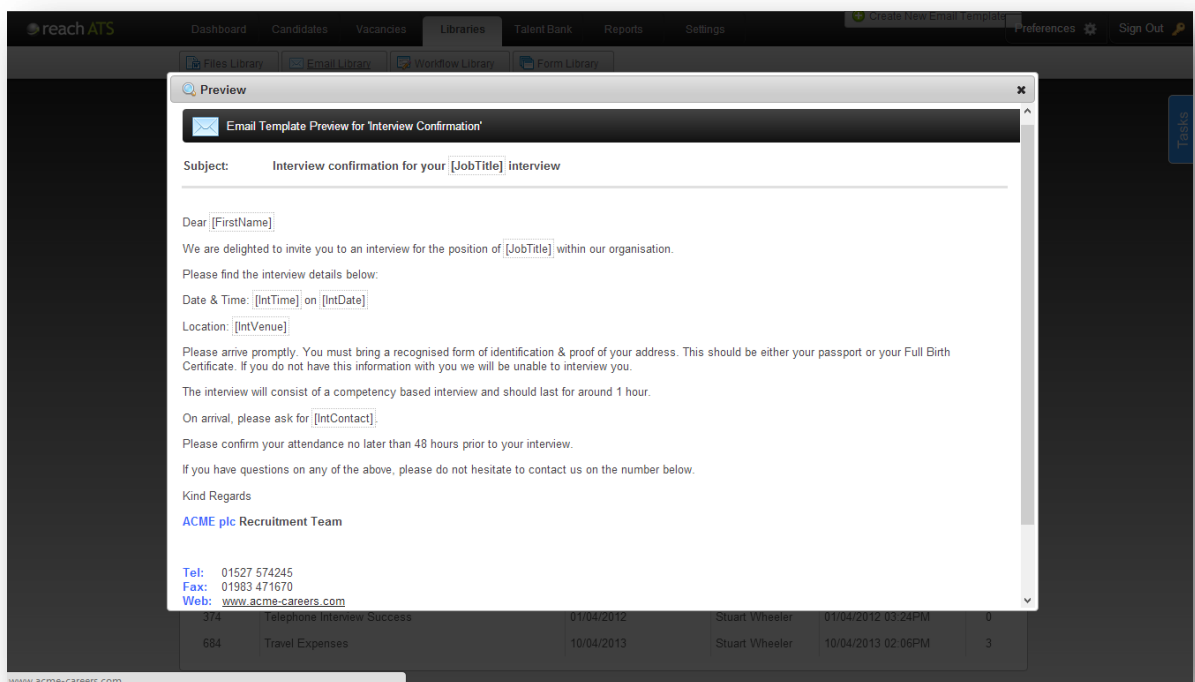
- Application received
- Interview invitations
- Regrets (*e.g. failed interview*)
- Offer letters & contracts
- Reference requests
- Internal notifications (*e.g. New Starter IT Requirements - sent to IT dept.*)

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**



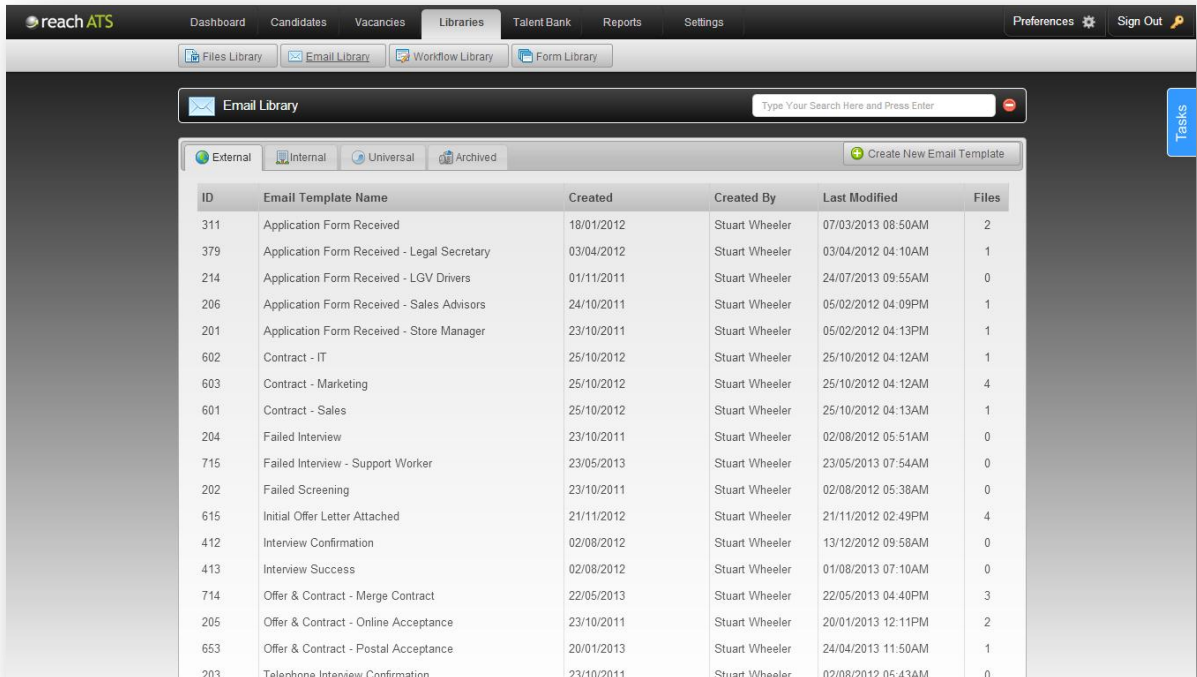
## 2. Email Library

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 screenshot shows the reach ATS interface with the 'Libraries' tab selected. The 'Email Library' is active, displaying a table of email templates. The table has columns for ID, Email Template Name, Created, Created By, Last Modified, and Files. The templates are organized into tabs: External, Internal, Universal, and Archived. A search bar is visible at the top of the library view, and a 'Create New Email Template' button is located in the top right corner of the table area.

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
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 Acceptance	23/10/2011	Stuart Wheeler	20/01/2013 12:11PM	2
653	Offer & Contract - Postal Acceptance	20/01/2013	Stuart Wheeler	24/04/2013 11:50AM	1
203	Telephone Interview Confirmation	23/10/2011	Stuart Wheeler	02/08/2012 05:43AM	0

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

The screenshot shows the 'Email Template' creation interface in reach ATS. The top navigation bar includes 'reach ATS', 'Dashboard', 'Candidates', 'Vacancies', 'Libraries', 'Talent Bank', 'Reports', 'Settings', 'Preferences', and 'Sign Out'. Below the navigation, there are tabs for 'Files Library', 'Email Library', 'Workflow Library', and 'Form Library'. The main content area is titled 'Email Template' and has three sub-tabs: 'Template Details', 'Template Content', and 'File Attachments'. The 'Template Details' tab is selected, showing the following fields:

- Name:** Failed Interview
- Tags:** Interview Reject
- Source Type:** External (dropdown menu)
- Description:** This template is sent to external candidates that do not pass the 1st Interview for the vacancy

#### Template Content

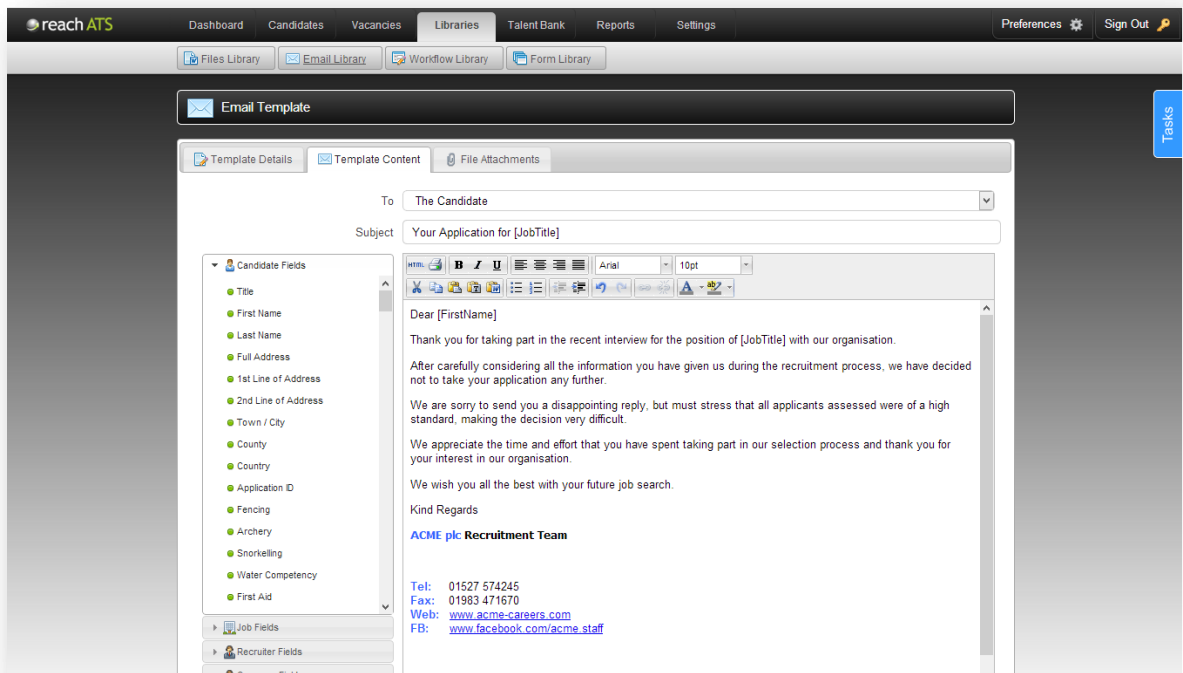
- **To** (select the email recipient from the pick list e.g. *Candidate*)
- **Subject** (type as you wish it to appear in the recipient's Inbox)
- **Type the Content**

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**

