Configuring Communication Templates

Last Modified on 03/13/2022 7:17 pm EDT

To establish messaging templates for recruiters to use to communicate with applicants, follow the steps below.

START HERE

1. From the main menu, search for *communication* (or navigate **Admin>HR Setup>Applicant Tracking/Recruitment>Templates Library>Communication Templates**). This page lists all predefined messaging templates for the Recruitment module.

HR Setup > Applicant Tracking/Recruitment > Templates Library > Communication Templates

← Applicant Communication Templates

| Rows On Page | 20 ⌄ | **3** Rows | ↻ Refresh Data | | Full Screen | [Default] ⌄ |

		Name	**Attachments**	**Enabled**	**Created**	**Description**
		starts with ⌄	starts with ⌄	All ⌄	= ⌄	= ⌄
✎	X	Phone Screen Interview		Y	03/25/2019 04:05p	
✎	X	Candidate Not a Fit		Y	03/25/2019 04:06p	
✎	X	Offer Letter Comm		Y	10/29/2020 11:36a	

2. To edit an existing template, click the edit ✎ icon. To create a new one-click **NEW TEMPLATE**

NEW TEMPLATE .

← Applicant Communication Template   SAVE

Template Description ⚲

    Name*

    Description

    Active ☑

Recipients ⚲

			Append CC	Append BCC
☑	Applicant		☐	☐
☐	User	👥	☐	☐
☐	Email		☐	☐
☐	Allow Manual Email Entry ⓘ		☐	☐

Email/Mailbox Message

Enabled ☑
From*
Subject*

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Attachments **ADD**

TAGS

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{ACCOUNT_FIRST_N/

Field Name	Definition
Name	Template name.
Description	Description of the template so recruiters know how to use it.
Active	Whether the template is available for recruiters to use.
Global	Whether the template is available to all users listed under **Admin>Company Settings>Global Setup>Notifications** under the system category, APPLICANT TRACKING)
Recipients	Who will receive the emails and how those emails will be delivered: **Email**: the default email address to receive a copy of this template. **Applicant**: if the applicant is an internal applicant or an existing employee when this box is checked, they will receive the template message just as an outside applicant would. (**Cc**) section: the email for the recipient who should be cc-ed. (**Bcc**) section: the email for the recipient who should be bcc-ed.
Message	The body of the email message is to be used every time the user initiates a message.
AVAILABLE TAGS	Use these tags in the body of the message to automate information the system will use to pull information.

If you have SMS Integration with Twilio, you can also set whether the message will go out as a text message (for a small extra SMS fee) in the **SMS Message** area.

Once you select this option, an additional area displays where you set up the text message.

To see a sample of the message that would generate using this template, add your email address in the **Email** field. Then go to the Recruitment module and initiate a message. Once you have reviewed the message to your liking, return to the screen above and remove your email address.

3. Click **SAVE** to finish. The template will then be available for quick re-use by recruiters and/or global users.