Introduction

This article is intended to help you better understand the purpose and use of System Email Templates.

An email template is a customized or default email that is automatically sent when a routine is completed or scheduled. Email templates are a valuable resource, as they allow for standardized communication across your client base. Additionally, utilizing email templates enhances time efficiency by reducing the number of steps needed to complete tasks, such as setting up a workflow, creating reminders for benefits, payroll processing email notifications, or payroll run schedule reminders.

Note: When creating a system level email template, this is a system level change. Meaning every client within the chosen environment could be impacted or have access to this template. If you wish to create unique or individualized email templates, please consider utilizing the **Client Email Templates** screen. For information regarding the setup and configuration of client email templates, please refer to the Email Templates article and/or the HR Management Setup Client Level course in the HR Certification Journey.

Email Templates

Navigate to **System Management > System Email Templates**.

Note: If you're a PEO, navigate to **System Management > System Benefits > PEO Benefits > System Email Templates.** The process for creating/editing an email template remains the same.

A critical step in setting up an email template is to select the correct **Email Type**. The **Email Type** determines where this email template is available for selection within the isolved system. It also determines which placeholder options are available. Email types are added to the system by isolved, and are currently limited to Benefits, Payroll Process Notifications, Payroll Run Date Reminders, and Workflows.

To add a new system email template, follow these steps:

1. Click **Add New Email**.
2. Select the **Email Type** dropdown menu.
3. The **Email Subject Line** is the line that appears in the "Subject" line of the email and is discretionary.
4. The **From Name** can include a company name or individual name. The name is followed by "noreply@(Service Bureau Name).com."
5. If the **Inactive** box is selected, this email template becomes unavailable for selection for the routine (Email Type).
6. E-mail text placeholders can vary depending on the **Email Type** selected. A placeholder can replace employee names, absence dates, pay group, etc. To input a placeholder into the email template, select this icon:
7. Click **Save**.

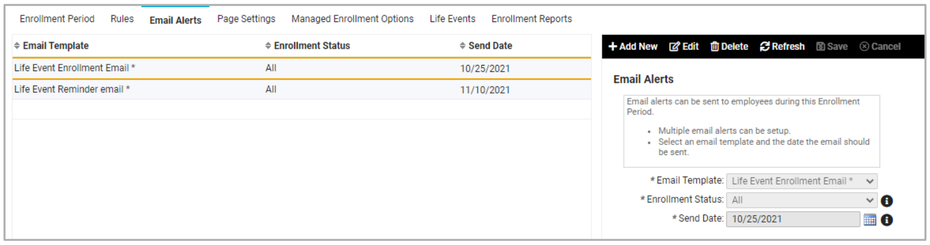
Continue this process until all Email Templates are customized and saved.

Email Types

Benefits

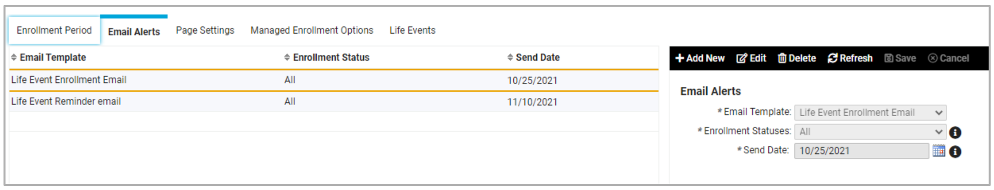
This Email Type is available on the **Client Management > Benefits > Benefit Enrollment Setup** screen on the **Email Alerts** tab.

This email is sent to the employee based on the enrollment status selected. For example, an email can be sent to all employees letting them know open enrollment is now open and can provide instructions for them to follow.



This Email Type is also available for PEO users on the **System Management > System Benefits > PEO Benefits > System Enrollment Setup** screen on the **Email Alerts** tab.

Note: This screen is only available for PEO users through a PEO environment.



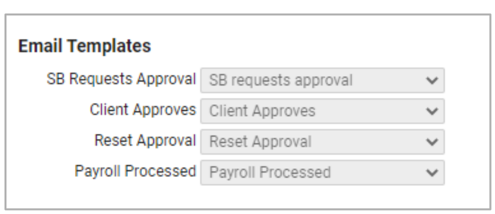
The placeholders available for this Email Type include:

- Client Code
- Client Name
- Company ID
- DBA Name
- EE First Name
- EE Name
- EE Number
- Legal Name
- PartnerURL
- Pay Group
- Period Name
- Preferred Name

Payroll Processing Notifications

This Email Type is available on **System Management > System Setup > Input Methods** screen.

This email can be attached to either SB Request Approval, Client Submits, Reset Submit, or Payroll Processed based on the processing option selected during setup. For example, if a client submits their payroll, the service bureau can receive an email notifying them as such.



The placeholders available for this Email Type include:

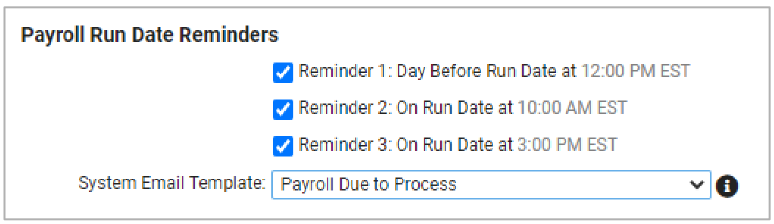
- Client Code
- Client Name
- Company ID

- DBA Name
- Legal Name
- PartnerURL
- Pay Date
- Pay Group
- Pay Period
- Payroll Run Type
- PEO Name
- Run Date

Payroll Run Date Reminder

This Email Type is available on the **System Management > System Setup > Payroll Types** screen.

This email can be attached to payroll types and sent out as reminders to process payroll the day before the run date at noon EST, the run date at 10 AM EST, or the run date at 3 PM EST.



The placeholders available for this Email Type include:

- Client Code
- Client Name
- Company ID
- DBA Name
- Legal Name
- Pay Date
- Pay Group
- Payroll Run Type
- Period End Date
- Run Date

Workflow

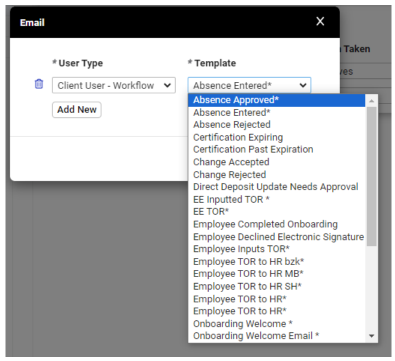
This Email Type is available on the **Client Management > Workflow Setup > Workflow Routes** screen under the **Process** tab.

The workflow process consists of steps and actions associated with the route. The data entered here determines who initiates the workflow process and who can approve or reject pending transactions. It defaults to having two steps, but you can add more as needed with the **Add New Step** button. Users can add new steps, add additional actions to an existing step, and attach email(s) to each action. For “Notification Only” workflow categories, only one step is possible due to the nature of the category.

If you're looking for a more in depth explanation and walkthrough of the **Workflow Routes** screen, including creating/assigning email templates to a workflow, please view the Workflow Setup and Maintenance User’s Guide article or the Workflow Configuration course in the HR Certification Journey.

To attach an email template to the workflow process, select the envelope icon. Email notifications can be sent to a specific user for a company's approval process for a predefined set of transactions. For example, if an employee inputs a time off request, their manager can then receive an email notifying them of the request. Once the request is approved, an email can then be sent back to the employee notifying them of the approval. Workflow routes can be set up for numerous transactions.

Note: When creating and adding an email template to any stage of a workflow, system templates are easily recognizable by an (*) beside their name.



The placeholders available for this Email Type include:

- Absence Date
- Absence Policy
- Absence Start Time
- AbsenceHours
- Client Code
- Client Name
- Company ID
- DBA Name
- EE First Name
- EE Name
- EE Number
- Legal Name
- PartnerURL
- Pay Group
- Preferred Name
- Workflow Comments - If a request in the workflow has a comment box, any comments entered are then included in the email notification. Additionally, if there are any comments added during the approval or rejection of the workflow, they can also be included in the email sent back to the appropriate individuals or employees who require that information.