isolved™

Email Templates

Help Docs

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Introduction

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

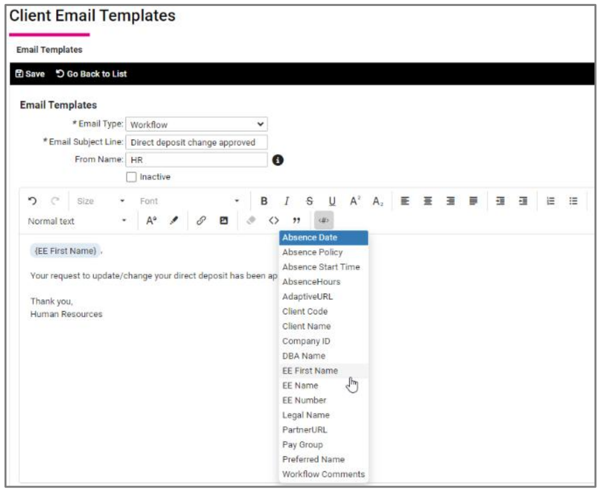
Email templates in the isolved system are not just a feature. They're a flexible tool that empowers you to communicate effectively, save time, and automate your workflow. They are pre-designed layouts or formats for email messages that can be reused multiple times with minor adjustments, allowing you to focus on your message rather than the formatting.

Note: For information regarding System-Level Email Templates, please see the article System-Level Email Templates.

Email Template

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. To create a new **Client Email Template**, follow these steps:

1. Navigate to **Client Management > Workflow Setup > Client Email Templates**.
2. Click **Add New Email**.
3. Select the **Email Type** dropdown menu. The **Email Type** is added by isolved. The current **Email Types** available include:
    - Benefits
    - Certifications
    - Corrective Actions
    - Employee Messages
    - Employee Notices
    - Employee Self Service Activation
    - Mass Email
    - Paystub Alerts
    - Performance Reviews
    - Workflow
    - YE Tax Form Notification
4. The **Email Subject Line** is the line that appears in the "Subject" line of the email.
5. The **From Name** can include a company name or individual name. The name is followed by "noreply@(ServiceBureauName).com."
6. If the **Inactive** box is selected, this email template becomes unavailable for selection for the routine (Email Type).
7. **Email Text** allows you to add customized text using the selected placeholders in the Email Type.
8. **Add Variables:** The Email Text Placeholders can vary depending on the Email Type selected. A placeholder can replace employee names, absence dates, pay groups, etc. The placeholder can be generated by clicking on this icon:
   Example: *Placeholder {EE First Name}*



The employee's first name appears in the email text when the email is sent using this placeholder.

Example: *{EE First Name}* shows "John."

9. **Mobile Push Notifications** is where you can add any customized notifications used with the isolved Go mobile app. Placeholders can be used in these notifications. Specific employee self-service user roles must be set up for these notifications, and they are:
    - **Manager/Supervisor Role:** "TOR Approvals and Rejections"
    - **Employee Role:** "Address Updates," "Time Off Requests," "Pay Deposited," "Personal Information Updates"
      Note: Time Verification uses the Timecard Verification Rules set up under **Client Management > Time Management > Verification Rules**.
10. Click **Save**.

Continue this process until all email templates are customized and saved. Some templates contain default email text, which can be used if desired.

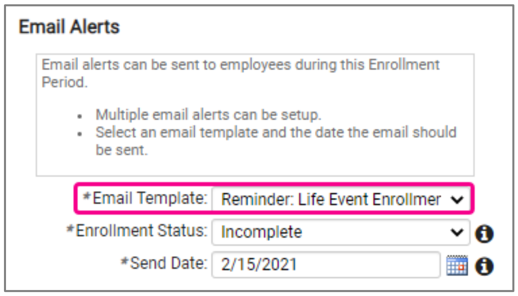
Email Type

Benefits

The placeholders available when selecting this **Email Type** are:

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

This **Email Type** is available under **Email Alerts** on the **Client Management > Benefits > Benefit Enrollment Setup** screen. See example below:

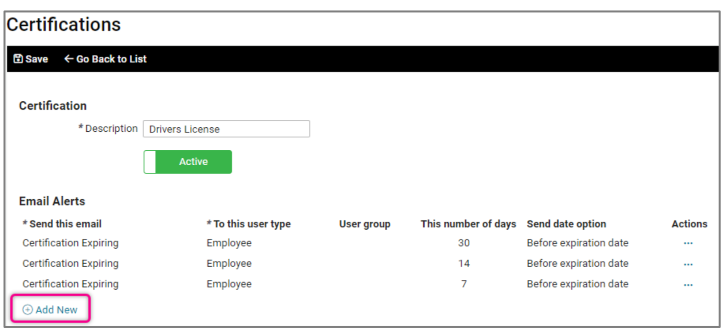


Certifications

The placeholders available when selecting this **Email Type** are:

- Certification Expiration Date
- Certification Type
- DBA Name
- EE First Name
- EE Name
- EE Number
- Legal Name
- PartnerURL
- Pay Group
- Preferred Name

This **Email Type** is available for selection under **Client Management > HR Management > Training and Development > Certifications**, under **Email Alerts**. You can add multiple email templates by clicking on **Add New** for each type.



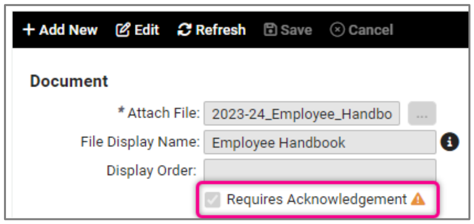
Employee Messages

The placeholders available when selecting this **Email Type** are:

- DBA Name
- EE First Name
- EE Name
- EE Number
- Legal Name
- Message Title
- PartnerURL

- Pay Group
- Preferred Name

This **Email Type** is available for selection on the **Client Management > HR Management > HR Administration > Employee Messages** screen. Check the **Requires Acknowledgement** box on the **Documents** tab to activate email alerts.



Select the **Email Alerts** tab to add the email template.

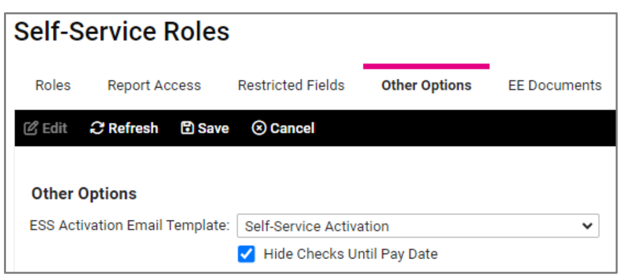
Employee Self-Service Activation

The placeholders available when selecting this **Email Type** are:

- Auth Code
- Auth URL
- DBA Name
- EE First Name
- EE Name
- EE Number
- Legal Name
- Pay Group
- Preferred Name
- User Name

There is a default system-generated self-service activation. Therefore, this **Email Type** should only be used to customize the activation email.

This **Email Type** is available on the **Client Management > Client Utilities > ESS Settings > Self-Service Roles** screen under the **Other Options** tab.



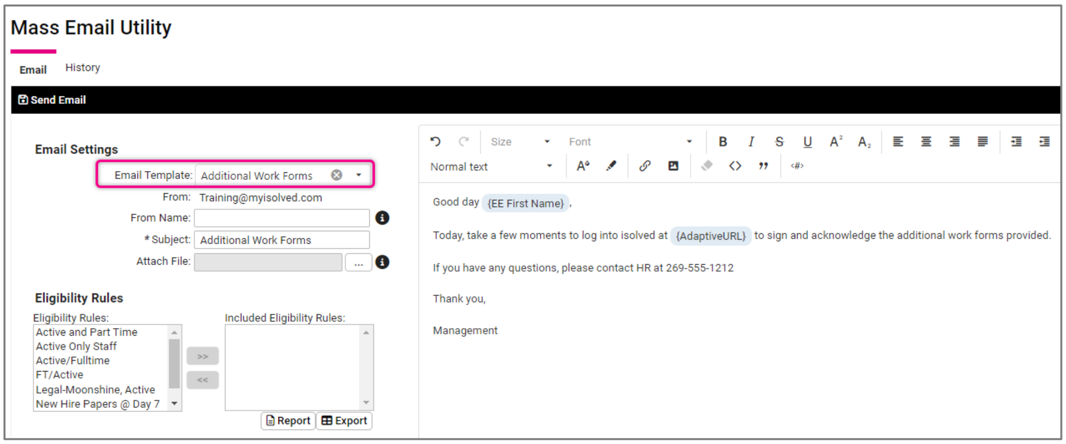
Mass Email

The placeholders available when selecting this **Email Type** are:

- DBA Name
- EE First Name
- EE Name

- EE Number
- Legal Name
- PartnerURL
- Pay Group
- Preferred Name

This **Email Type** is available under **Client Management > Mass Email Utility**.

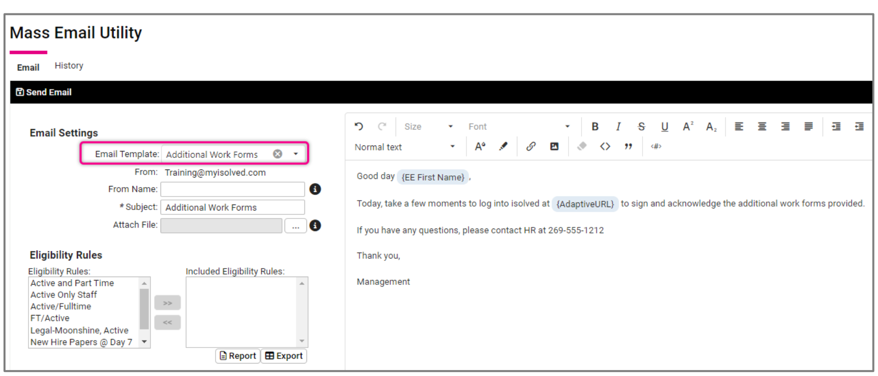


Paystub Alerts

The placeholders available when selecting this **Email Type** are:

- DBA Name
- EE First Name
- EE Name
- Legal Name
- PartnerURL
- Pay Date
- Pay Group
- Period Begin Date
- Period End Date
- Preferred Name

This **Email Type** is available on the **Client Management > Client Maintenance > Pay Group** screen under the **Email Alert** tab.



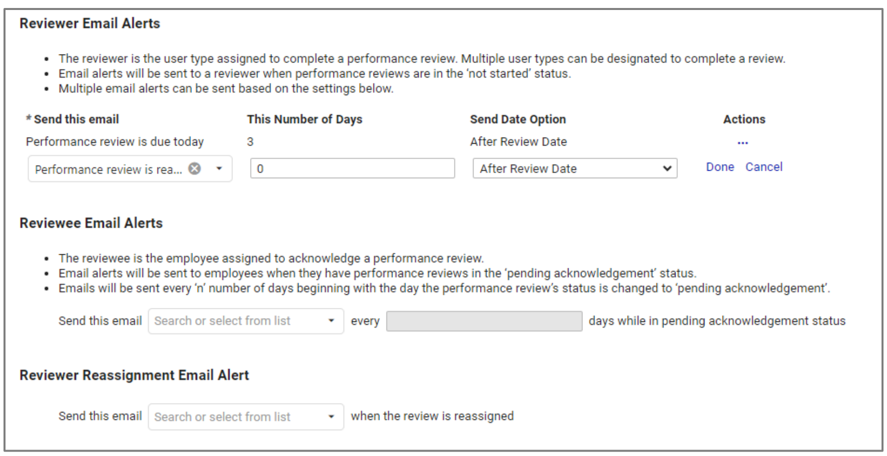
Note: Remember to add the email template to each applicable pay group.

Performance Reviews

The placeholders available when selecting this **Email Type** are:

- DBA Name
- EE First Name
- EE Name
- EE Number
- Legal Name
- PartnerURL
- Pay Group
- Preferred Name
- Review Date

This **Email Type** is available on the **Client Management > HR Management > Performance > Performance Reviews** screen. See an example below of the multiple performance review email alerts that you can send:



Note: We suggest setting up three email templates for each alert: one for the "Reviewer," one for the "Reviewee," and one in case of "Reassignment."

Workflow

The placeholders available when selecting this **Email Type** are:

- Absence Date
- Absence Policy
- Absence Start Time
- AbsenceHours
- Client Code
- Client Name
- Company ID
- DBA Name
- EE First Name
- EE Name
- EE Number

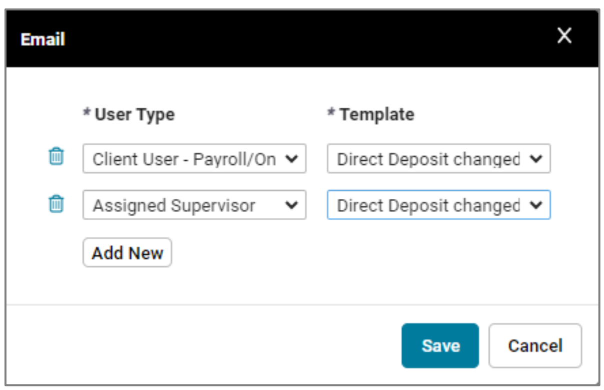
- Legal Name
- PartnerURL
- Pay Group
- Preferred Name
- Workflow Comments

This **Email Type** is available on the **Client Management > Workflow Setup > Workflow Routes** screen under the **Process** tab. Workflow routes can be set up for numerous transactions or changes in isolved. Please refer to the Workflow Setup and Maintenance article in the University Library for additional information.

To add an email template to a step, follow these steps:

1. Click **Process**.
2. For each section, select the **Assigned User Type** who initiates the update or approves/rejects changes (multiple user types can be added by selecting **Add New**).
3. Choose the **Next Step** using the drop-down menu.
4. Click the envelope icon to the right of **Next Step**.

Another window opens, allowing you to choose the assigned recipient under **User Type** and the designated email template from the **Template** drop-down menu.



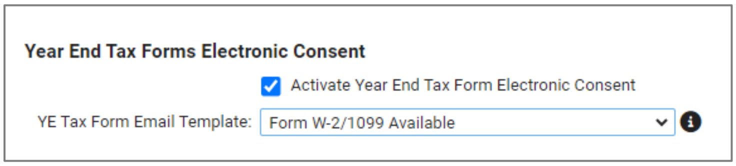
Note: When creating and adding an email template to any workflow stage, templates created at the system level are easily recognizable by an (*) beside their name.

YE Tax Form Notification

The placeholders available when selecting this **Email Type** are:

- DBA Name
- EE First Name
- EE Name
- EE Number
- Legal Name
- PartnerURL
- Pay Group
- Preferred Name
- User Name

This **Email Type** is available on the **Client Management > Client Utilities > ESS Settings > Self Service Roles** screen under **Other Options**.



Note: Remember to activate “Year End Tax Form Electronic Consent.” Only employees who have agreed to the year-end electronic Consent receive this email when year-end tax forms are ready.