

Settings – User Account – Email Templates

Set Up Email Templates for sending to Candidates and Clients

Here you can set up pre-written Emails to use for sending to Candidates and Clients from your eBoss database.

- Go to Settings
- Email Templates (under User Account section)

Search & Filter

If you have a large number of Template Emails you can Search or Filter by:

- Using the Search Field
- Clicking the column headings (Title, Subject, Date, Type etc)
 - Clicking the Type and Role column headings allows you to quickly sort templates by Initial, Regular, Candidate or Client
- Using the page numbers at top right of the list
- Select how many records to display using the dropdown at the bottom of the list

Create New Email Template

To create a new Email Template:

- Click the link at the top of the page
- Choose a Style from the drop down menu
- Enter a Title for your template
- Enter a Subject for your Template
- Enter the Email Body – use the Toolbar to format your text as you wish.
 - Client & Candidate Tags are available on the Toolbar, use these to personalise your template as required
- Tick the 'Is Active' checkbox to make the Template active.
- Choose the Role & Type of template
- Select if Consultants / Managers have access to this template
- Click Save to make the Template available on your eBoss database.

Preview an Email Template

Click the 'note' icon to the right of the Role column to preview the content of the Email Template

Edit an Email template

To edit an existing Template click the 'pencil' icon on the right hand side of the screen. You can edit the same fields as when you Create a New Template above.

Delete an Email Template

To Delete an Email Template click the trash can icon on the right.

Styles

Email Styles allow you to customise the Header & Footer of emails from your eBoss database.

Click the 'Styles' link at the top of your screen to view email Styles.

You can Search and Filter Styles in the same way as Templates (see above 'Search & Filter').

Editing Styles

- Click on the pencil icon to edit a Style
 - Make any changes needed to the Header and Footer content.
 - Click Save to save your changes

Adding a New Style

- Click the 'Add new+' link at the top of your screen
- Enter a Name
- Enter the Header content
- Enter the Footer content
- Click Save to create the new email Style