Using the PAN System

CUSTOMIZING EMAIL TEMPLATES

Updated: April 16, 2017

Introduction

- The PAN platform provides a number of Email templates to facilitate communication.
- Our standard Email templates are easily customized with your own text.
- You can also modify:
  - From Address
  - CC and BCC Addresses
  - Email Subject

CAUTION: The changes you make to an email template will affect all candidates moving forward.

Introduction

- All templates utilize “Tokens” to simplify the customization of your Emails. Tokens are formatted as follows: %%*VariableText*%%
- To help you find the templates you need, we’ve organized them into categories. On the following slides, we’ve listed the Emails that you will find within each of the four categories:
  - –Administrator Functions
  - –Assignment –Candidate
  - –Billing and Credit
  - –Client Settings

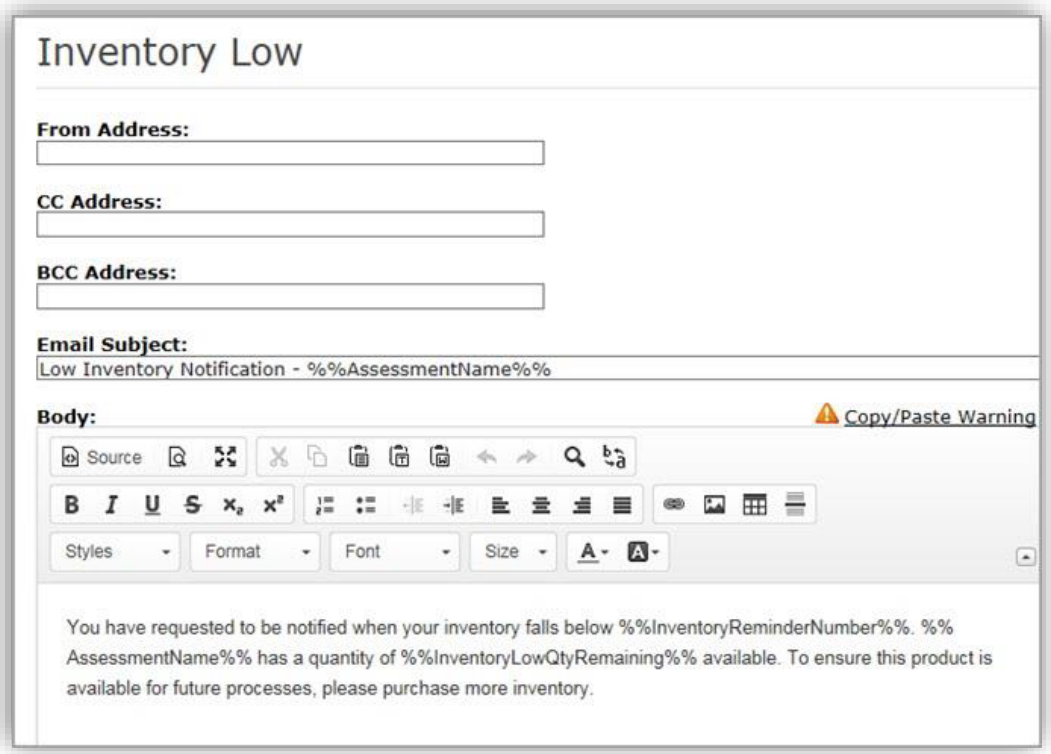
Email Type: Administrator Functions

- Within this category, you will find Email templates on the following topics:
  - –Accommodation Request Approved/Denied/ Under Review
  - –Account Created
  - –Candidate Created
  - –Candidate Notification of Custom URL
  - –Candidate Score Reports Available
  - –Notification of Changed Login ID
  - –Registration Received/Approved/Rejected
  - –Test Completed

Email Type: Assignment-Candidate

- This Email category includes the following templates:
  - –360 Rater Notification and Reminders
  - –360 Subject Notification and Reminders
  - –Assessment Notification and Reminders
  - –Assessment Assigned Notification and Reminders

Email Type: Billing & Credit

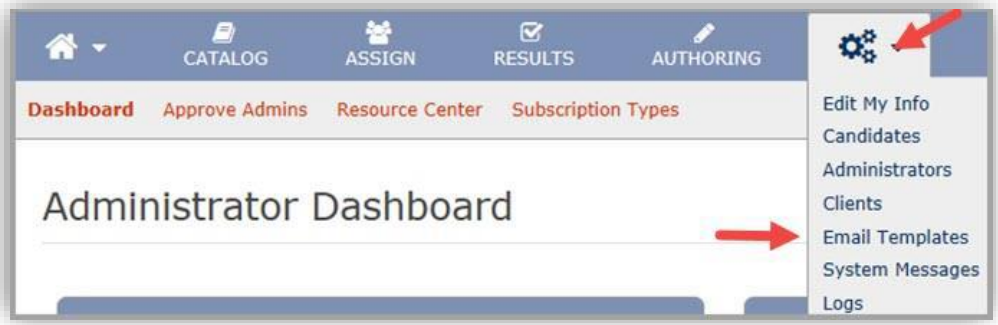


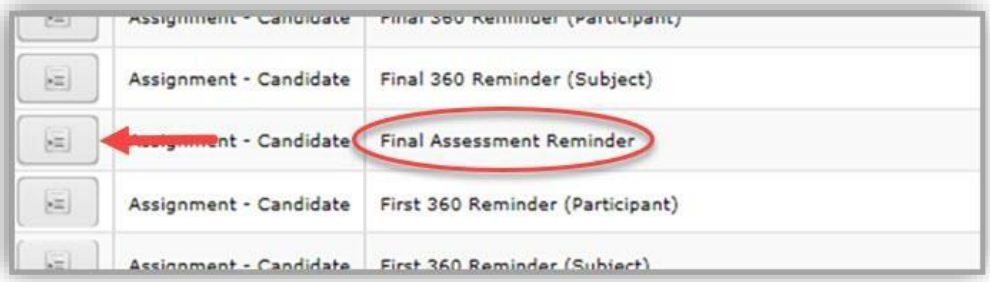
- This Email category includes the "Inventory Low" template shown below

Email Type: Client Settings

- "Client Settings" Email templates include:
  - –Administrator Notification of the Type of PAN Subscription Selected
  - –Notification to PAN Client Services and Sales of Client's Subscription Type Selected
  - –Low Product Inventory for Custom URL
  - –Maximum Number of Candidates Reached for Custom URL

Customizing Email Templates

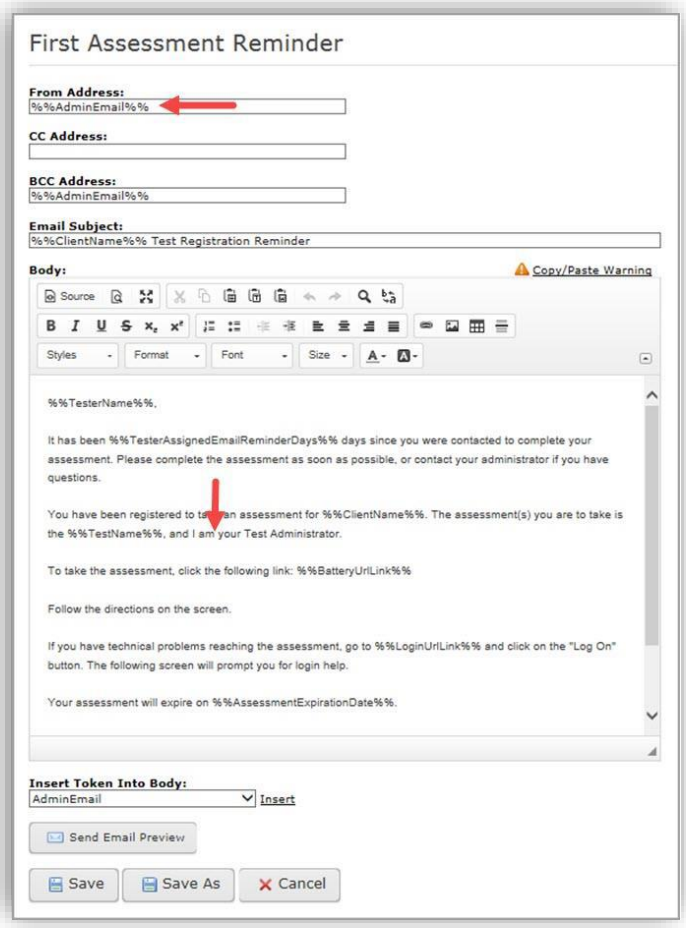




To customize an Email Template:

1. Under the "Settings" tab (3 wheels), click "Email Templates."
2. Locate the Email that you want to edit and click the icon in the "View" column.

Customizing Email Templates



3. Identify where you want to make changes.
4. In the example on the next slide, we:
   - –Replaced the token in the "From Address" field with the Administrator's Email Address
   - –Inserted the Administrator's name in the text, using a token.
   - –Did NOT alter a token by changing the text between the "%%" as this would render the token unusable.

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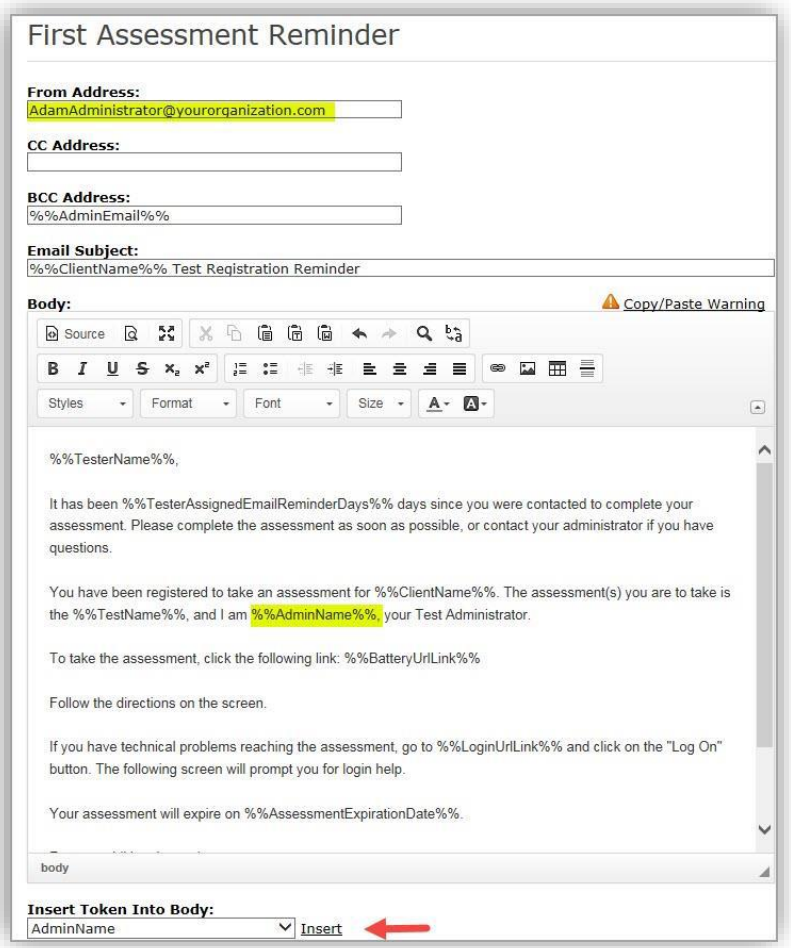
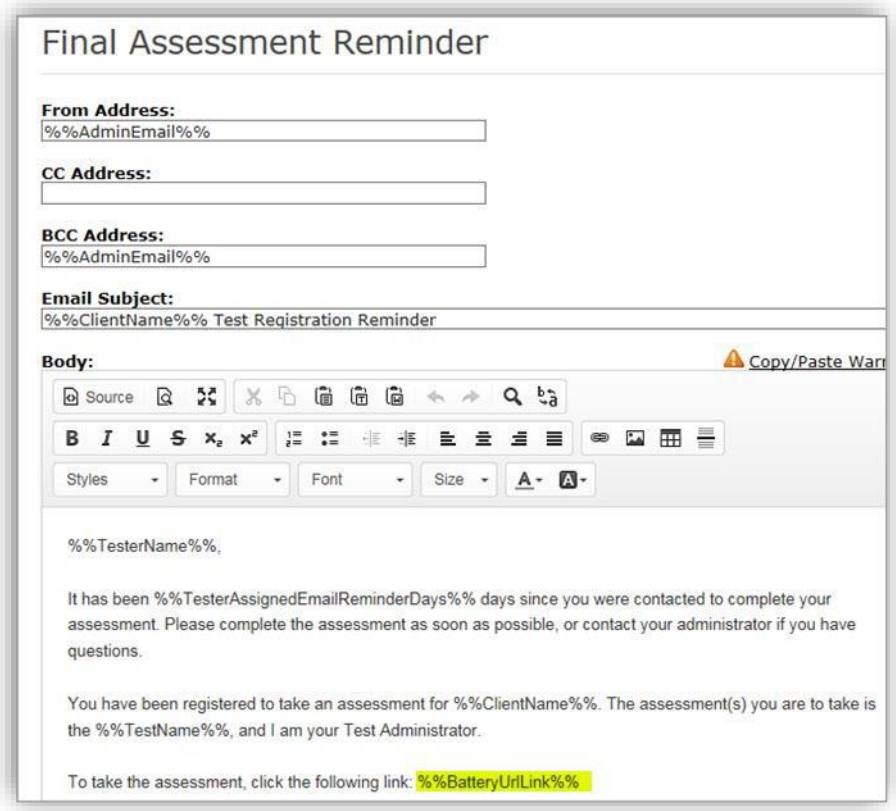


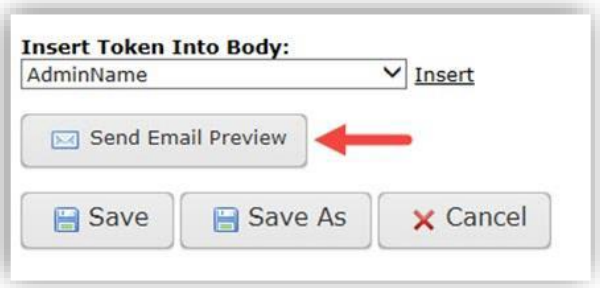
5. To insert a token:
   - –Find the desired token in the dropdown list under "Insert Token Into Body"
   - –Place the cursor where you want the token inserted
   - –Click "Insert"

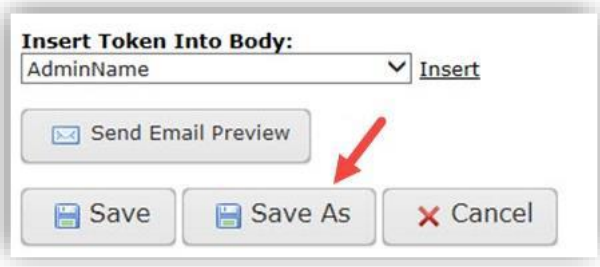
Customizing Email Templates

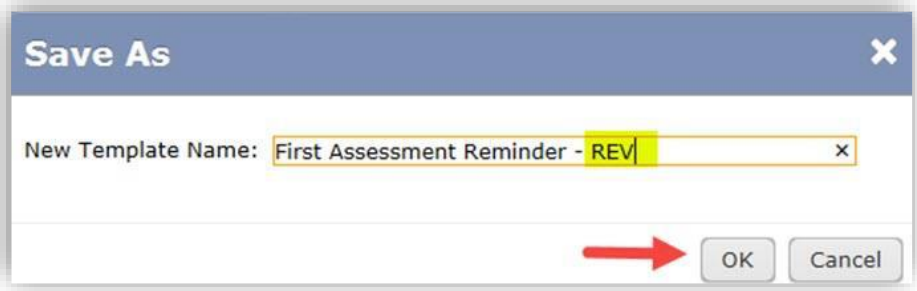


6. Be careful when removing tokens as you may eliminate a necessary assessment process.
   - –Example: If the %%BatteryUrlLink%% is deleted from this template, the test taker will not be able to click a link to take the assessment.

Customizing Email Templates







7. Always test a customized Email by sending it to yourself, to ensure it is working properly.
8. When you are satisfied with the customized Email template:
   - –Click "Save As"
   - –Assign the template a new name and click "OK"

Reminders

- Do not change the test that falls between the “%%” symbols in a token as this will result in a non-functioning token.
- The changes you make to an Email template will affect all candidates moving forward.
- Removing a token could cause a necessary assessment process to be eliminated.

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QUESTIONS?

Contact Your PAN Account Representative