Email Templates

The pan system sends out emails automatically upon certain event occurrences. Some common automatic emails are:

Tester Assigned	-	Sent to the candidate assigned a test. The to the assessment an information about wh technical difficulties. Assigned email is au the Test Administra
Test Completed	-	Sent to the test admi candidate assessmen email lets the test ad the candidate has co assessment and the available for review.
Tester Assigned Reminder	-	Sent to the candidate started the assessme assignment.

Each of the automatic emails has a corresponding template that is used when sending out the email. When the system sends out the email, the pertinent items of information, such as candidate name, assigned assessment and assessment link, are inserted in designated places in the email (see the Tester Assigned example under Viewing and Editing Email Templates below). For a list of some of the commonly used email templates, see the Email Templates Reference.

See the following topics for help with Email Templates:

- Viewing and Editing Default Email Templates (below)
- The "Tester Assigned" Email Template
- Deleting Custom Email Templates

Viewing and Editing Email Templates

To view the templates or make modifications:

1. Go to **Settings | Email Templates**. Existing email templates are listed.

2. Click on the View button (leftmost column) for the email template you wish to edit. A page similar to the following will appear:

Tester Assigned

← Email Template Name

From Address:

`%%AdminEmail%%`

← Email address in the "From" field of the email. A standard email address may be inserted or the token for the administrator's email address (as shown here).

CC Address:

← Email address in the "CC" field of the email. A standard email address or a token may be used.

BCC Address:

`%%AdminEmail%%`

← Email address(es) of those to be BCC'd on the email.

Email Subject:

`%%ClientName%% Test Registration`

← Text for the "Subject" of the email. Tokens may also be used in this field.

Body: ⚠ Copy/Paste Warning

[Source ⌕ ⤢ ✂ ⧉ 📋 📋 📋 ↩ ↪ 🔍 🔤]

[**B** *I* U̲ S̶ x₂ x² ⅓≡ ⋮≡ ⇥≡ ≡⇤ ≡ ≡ ≡ ≡ 🔗 🖼 ▦ ▬]

[Styles ▾ Format ▾ Font ▾ Size ▾ A▾ A▾]

Text for the "Body" of the email.

`%%TesterName%%,` ←

Tokens to represent variable text in the email template such as the candidate name (TesterName). Position the cursor, select the token from the drop-down list under **Insert Token Into Body** and click **Insert**. Tokens are inserted with "%%" before and after to distinguish them from regular text.

You have been registered to take an assessment for %%ClientName%%. The assessment(s) you are to take is the %%TestName%%, and I am your Test Administrator.

To take the assessment, click the following link: %%BatteryUrlLink%%.

Follow the directions on the screen. If the link generates an error, instead of clicking the link directly, copy and paste the link into your browser.

If you have technical problems reaching the assessment, go to %%LoginUrlLink%% and click on the "Forgot your Info" link. An email will be sent to you with additional information.

Your assessment will expire on %%AssessmentExpirationDate%%.

For any additional questions, contact me.
%%AdminName%%
%%AdminPhone%%
%%AdminEmail%%

body

Insert Token Into Body:

`AdminEmail` ▾   Insert

[⊗ Delete] [✉ Send Email Preview] ← Send a preview email to your email address.

⟶ Save your edits to the email template.

[💾 Save] [💾 Save As] [✕ Cancel]

← Save the template with a new name (select email templates only).

When you edit the original/default Tester Assigned email template, you will see a **Revert to Original** button in place of the **Delete** button. If you wish to retain the original email template, please see the usage notes below on the Save As function.

3. Make changes to the email template as needed. See the following topics for additional information:

   - [Inserting Tokens](#)
   - [Editing the From Address of the Email Template](#)
   - [Editing the Email Subject of the Email Template](#)
   - [Editing the Body of the Email Template](#)

4. Click the **Save** button to save the email template.

Inserting Tokens

Tokens can be inserted into the From, CC, or BCC Email Address fields, Email Subject, or Body of the email template. Tokens represent variable text in the email, such as the candidate name (TesterName) or the link to the assessment (BatteryUrlLink).

To insert a token into the From Address or Email Subject, place your cursor where you wish to insert the token and *type in the token reference*. Please see the *Notes for Typing in Tokens* below.

To insert a token into the Body of the email template:

1. Place your cursor where you wish to insert the token.
2. Select the token from the drop-down list under **Insert Token Into Body** and click the **Insert** link. Tokens are inserted with "%%" before and after to distinguish them from regular text. You may also type tokens in the Body of the email template--see the *Notes for Typing in Tokens* below.

Notes for Typing in Tokens:

You may type in tokens, but if you do so:

- Be sure to include the "%%" before and after the token name with no padding spaces.
- Be sure to type the token name correctly.
- Be sure that the token is available for the particular email template you are editing. Not all tokens can be used in all emails. To see which tokens are available for the email template you are currently editing, view the drop-down list under **Insert Token Into Body**. If you use a token that is not available, the system will notify you upon attempting to Save the template.

See also the [Tokens Reference](#) topic for an explanation of the available tokens.

Editing the From, CC, or BCC Email Address Fields

Whatever you insert in the "From Address" field in the email template will be inserted into the "From" field of the email. A standard email address may be inserted or a token may be used, such as the %%AdminEmail%% token to insert the administrator's email address (see "Inserting Tokens" above). For example, if you use the %%AdminEmail%% token in the From Address in the Tester Assigned email template, the email sent to the candidate will be "from" the test administrator's email address.

If you leave this field blank, the email will be "from" the EA_Support@panpowered.com email address. If you leave the CC and BCC fields blank they will be blank in the email.

Editing the Email Subject of the Email Template

The text in the "Email Subject" field in the email template will appear as the subject line of the email. Tokens may be used in the Email Subject (see "Inserting Tokens" above), for example, the following Email Subject:

%%ClientName%% Test Registration Information

Would result in the following subject line for ABC Company:

ABC Company Test Registration Information

Editing the Body of the Email Template

It is recommended that you edit text directly in the editor textbox. If you use copy/paste to insert text, just make sure to test the email prior to sending to candidates.

The edit bar at the top of the body text editing box contains formatting tools that you can use to format the text of the email. As you are editing text the following options are available:
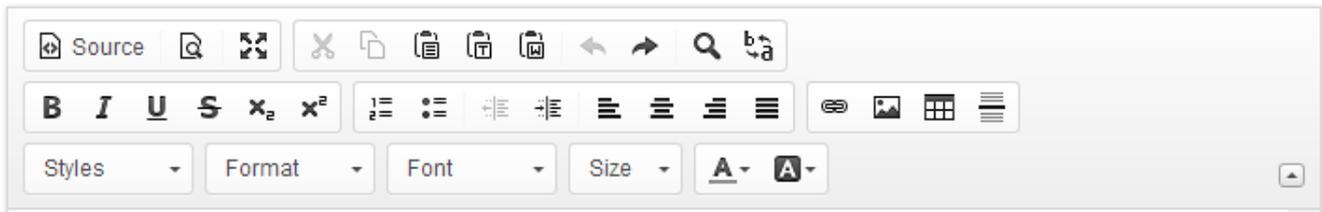
Mouse-over each button to see its function.

See the following additional topics related to editing the body of the email template:
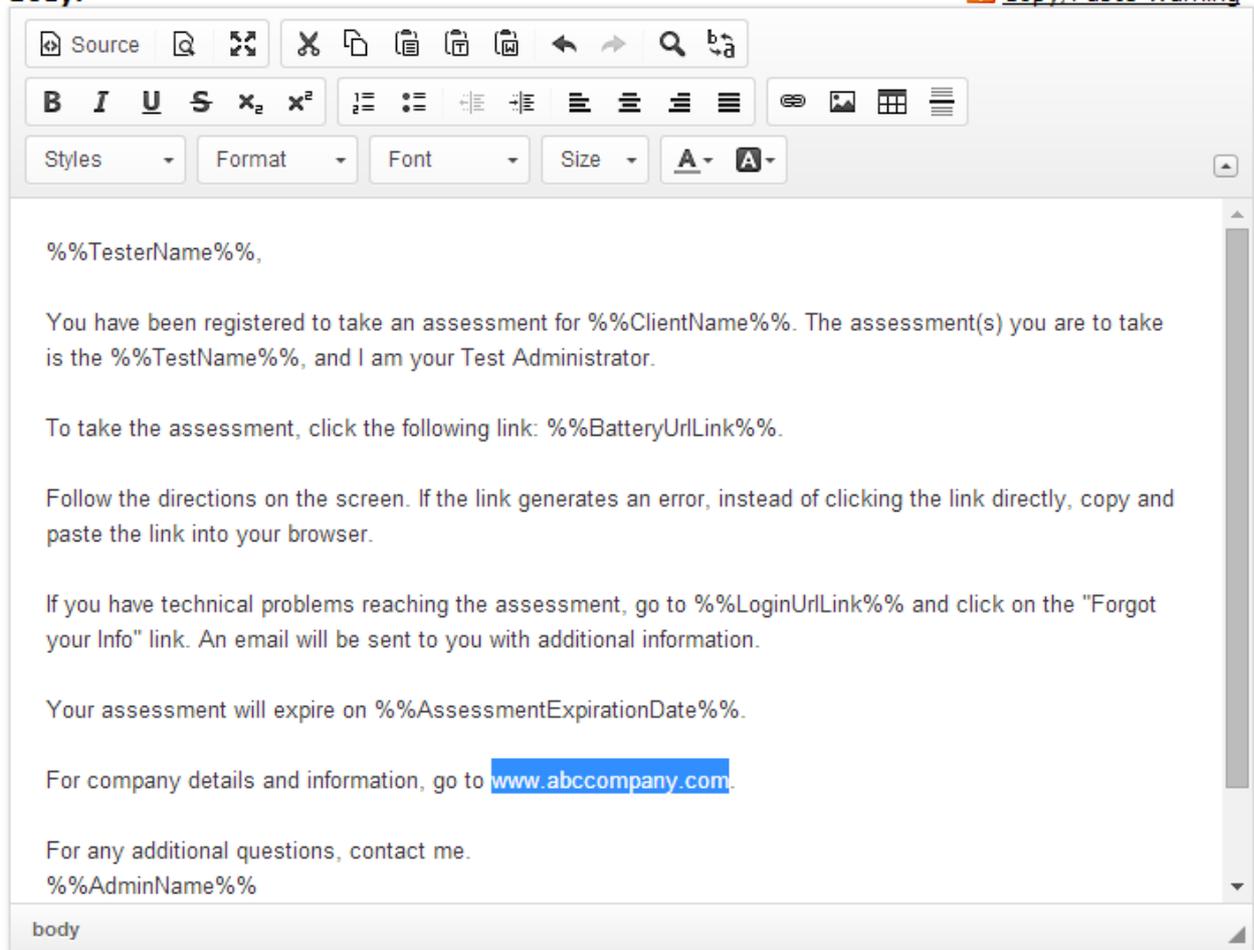
- Adding an HTML Link
- Viewing as HTML
- Entering a Link for a Token

Adding an HTML Link

The **Link** button ( ) can be used to insert HTML links to outside sites. To do this:

1. Inside the editor textbox, highlight the text for which you wish to insert the link (see the example below).

Body:

> Source | | | | | | | | | | |
>
> **B** *I* U S x₂ x² | | | | | | | | | | |
>
> Styles ▾ | Format ▾ | Font ▾ | Size ▾ | A▾ A▾ | ▴
>
> ---
>
> %%TesterName%%,
>
> You have been registered to take an assessment for %%ClientName%%. The assessment(s) you are to take is the %%TestName%%, and I am your Test Administrator.
>
> To take the assessment, click the following link: %%BatteryUrlLink%%.
>
> Follow the directions on the screen. If the link generates an error, instead of clicking the link directly, copy and paste the link into your browser.
>
> If you have technical problems reaching the assessment, go to %%LoginUrlLink%% and click on the "Forgot your Info" link. An email will be sent to you with additional information.
>
> Your assessment will expire on %%AssessmentExpirationDate%%.
>
> For company details and information, go to www.abccompany.com.
>
> For any additional questions, contact me.
> %%AdminName%%
>
> ---
>
> body

2. Click the **Link** button. The following screen is displayed:

3. Type in the Link URL:

NOTE: Do not place **http://** at the beginning of your link. The email template editor AUTOMATICALLY inserts **http://** in front of the link.

4. Click the **OK** button to insert the link.

Viewing as HTML

If you wish to view or edit your email template text as HTML or if you wish to

double-check that a link has been inserted correctly, click the **Source** button ( ).

The HTML code of the link inserted in the example above would be:

www.abccompany.com

To return to normal editing mode, click the **Source** button again.

Entering a Link for a Token

You may want to insert a link into the email template for the following tokens:

BatteryUrl	URL of the assessment that has been assigned candidate.
BatteryUrlLink	URL **as a link** of the assessment that has been assigned to a candidate.
BrowserCheckUrlLink	The URL **as a link** to the browser check page. want the candidate to use the browser check fi before taking the assessment (to make sure the browser is compatible), you can insert somethi "Check your browser to make sure it is compat where the text "Check your browser" links to th that automatically checks the browser compati
LoginURL	The URL that you access to login to your accou
LoginUrlLink	The URL **as a link** that you access to login to y account.

The easiest way to insert a link for these tokens is to use the "Link" version of the token. That is, to insert a link to the Battery URL (assessment URL), insert the **%%BatteryUrlLink%%** token into the body of the email. For example, entering the following into the email template:

To take the assessment, click the following link: %%BatteryUrlLink%%

Will insert something similar to the following into the body of the email when it is sent (with the assessment link inserted as a clickable link):

https://tara.vitapowered.com/TestEngine/TestLauncher.aspx?batteryID=efc7d884-55af-4a26-ba7f-c01c0adb7863&key=VwiemkiQOITL1Usm6oNXEANe2spz8wUOXqF21lahHIE1.

Inserting the **%%BatteryUrl%%** token or the **%%LoginURL%%** token inserts the URL, *but not as a link*.

Using the Save As Function (Tester Assigned Email Template Only)

Within **Settings | Email Templates**, the Tester Assigned Email Template has a **Save As** button that can be used to save multiple custom versions of the "Tester Assigned" email template. If you wish to retain the original default Tester Assigned email template for use in sending notices to candidates or simply for future reference, you must use the following procedure to avoid overwriting the original:

Note: You can always return to the original template by using the [Delete function](). The procedure below is for the situation where you wish to have the original available along with your custom templates.

1. Go to **Settings | Email Templates**.
2. Edit the Tester Assigned email template.
3. Click **Save As** to save the default Tester Assigned email template.
4. In the Save As dialog box, type in "- Default" next to the email template name as shown below:
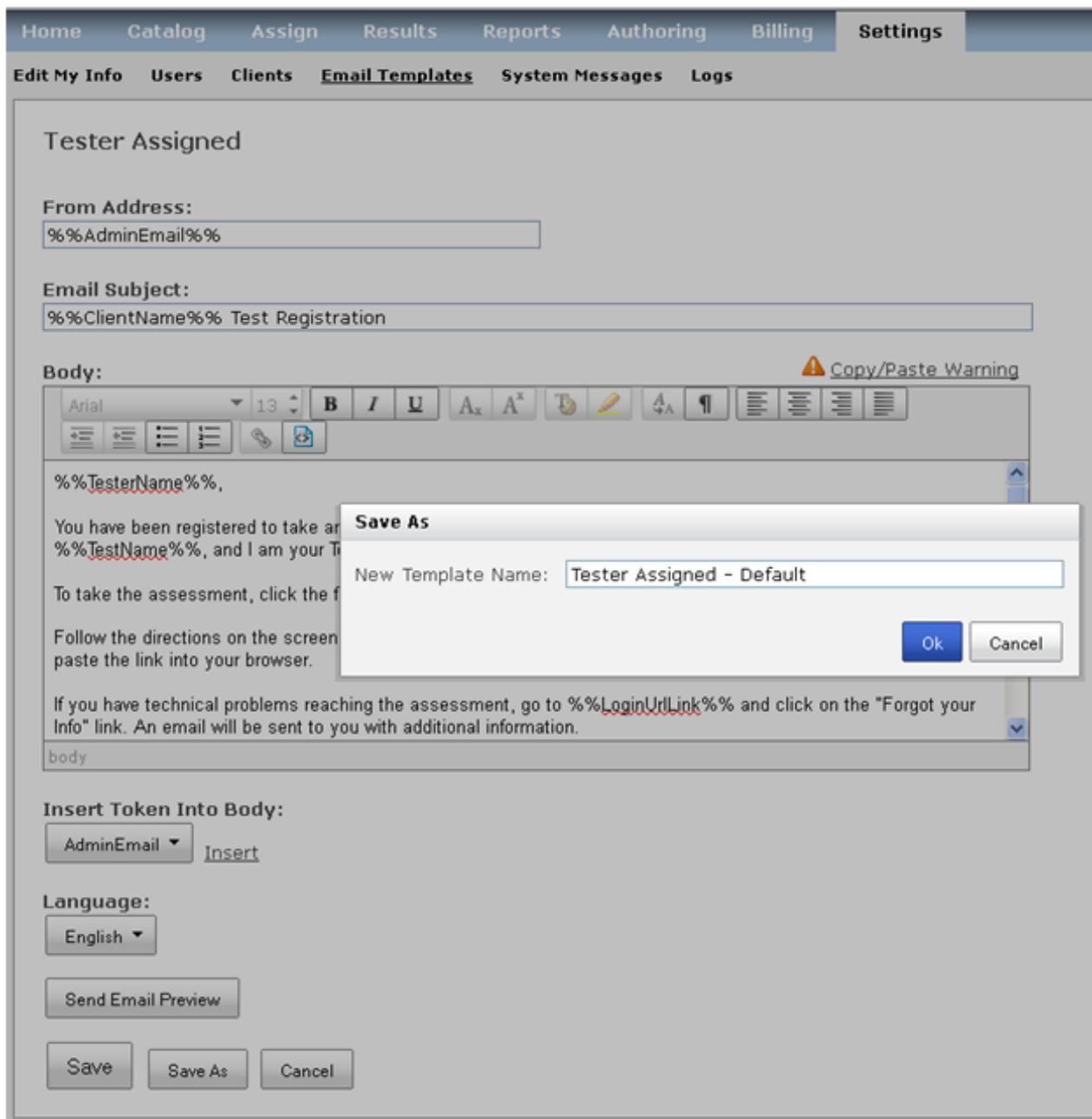
5. Click **OK** to save the template. Now you can use the **Save As** function to create custom "Tester Assigned" email templates in addition to the default template.

The "Tester Assigned" Email Template

The Tester Assigned email template is sent to the candidate when they are assigned a test. The email contains a link that can be used to launch the assessment and additional information about what to do in case of technical difficulties. A copy of the Tester Assigned email is automatically sent to the Test Administrator. Due to its extensive usage in the assessment assignment process, there are some special functions available with the Tester Assigned email template. See the following topics for additional information:

- Selecting an Email Template During Assignment
- Re-sending the Tester Assigned Email to a Candidate
- Creating Multiple Tester Assigned Email Templates

Selecting the Tester Assigned Email Template at Assignment

When assigning an assessment to a candidate, you can select which template to use in sending the notification email. As shown in the example below, when on the Select Options tab, the

drop-down list next to "Select Email Template" allows you to select which template to use for this candidate or group of candidates.

You can edit or create a custom Tester Assigned email template using the **Create New Email** button. See Creating Multiple "Tester Assigned" Email Templates.

Re-Sending the Tester Assigned Email Template

You can re-send the Tester Assigned email from the Assigned Detail window. To do this:

1. From the *pan* interface, click on **Results**. The *Product Status Matrix* is displayed.

2. Click on the linked number in the Assigned column on the *Product Status Matrix*. The Assigned Detail window is displayed.
3. From the Assigned Detail window, once you have chosen a candidate and selected **Resend Assignment Email Template** as the Action, the drop-down list of Email Templates will appear to allow you to select the Tester Assigned email template you wish to use, as shown below:

Creating Multiple Tester Assigned Email Templates

You can create multiple custom Tester Assigned email templates in one of two ways:

- Using the Save As Function
- During the Assign Process, by clicking on the **Create New Email** button during assessment assignment. When creating a new email template during assignment, you will be given the opportunity to save the template only for the current "one-time" use (it will be used only for the current mailing and will not be saved for later use) or as a new Tester Assigned email template that will appear as an option for assignments going forward.

[back to top]

Deleting Custom Email Templates

The Tester Assigned email template behaves differently and has different options that other email templates. Follow the link below for the type of email template you wish to delete:

Deleting a Custom Tester Assigned Email Template

Deleting Other Custom Email Templates

Deleting a Custom Tester Assigned Email Template

Use the steps below if you need to delete a custom Tester Assigned email template:

1. Go to the Email Templates listing under Settings (**Settings | Email Templates**).
2. Click the View button (leftmost column) to open the Email Template for editing.
3. On the edit page, click the **Delete** button. When you do this you will see a Notice confirming the deletion.

Note: You can delete all but one "Tester Assigned" email template. When you've removed all the Tester Assigned email templates except for one, deleting the one remaining Tester Assigned email template will revert it back to the system original.

Deleting Other Custom Email Templates

For email templates other than the Tester Assigned email template, for example the **Test Completed**, **Tester Assigned Reminder**, or **Candidate Custom URL Notification** email templates, you only have the ability to have one saved email template. When you edit the template, the edited version automatically replaces the original or previous version. Deleting in this instance is just reverting to the original template. To do this, follow the steps below:

1. Go to **Settings | Email Templates** and edit the email template you wish to "delete" (revert to original).
2. At the bottom of the template editing page, to the left of the **Send Email Preview** button, you will see the **Revert to Original** button.

     To delete your edited version of the email template and revert to the original version, click the **Revert to Original** button.

3. You will receive a notice indicating that "Your template was successfully reverted."

Click **OK** to be returned to the main email template page.

[back to top]

Tokens Reference

Selected tokens:

Token Name:	Variable text inserted in place of this token:
AdminEmail	Email address of the test administrator
AdminID	Login ID of the test administrator
AdminName	Name of the test administrator
AdminPhone	Phone number of the test administrator
AssessmentExpirationDate	Expiration date of the assessment. This is based on the setting in the Client record, **Assessment Expiration (In Days)**.
BatteryInstanceResultsLink	URL that allows access to the completed results for external recipients. The option to send results to external recipients is available if the **Send Results to Other Recipients** setting in the Client Information record is set to Yes. When this setting is set to Yes, the Admin will see the **Send Email When Candidate Completes To** option during the assign process. Upon test completion, an email will be sent to external recipient emails specified during the assessment assignment process.
BatteryUrl	URL of the assessment that has been assigned to a candidate
BatteryUrlLink	URL as a link of the assessment that has been assigned to a candidate
ClientName	The name on your client account (typically your company name)
ClientInventoryURLEmails	The email address of the test administrator who will receive the inventory notice emails for a Custom URL.
ClientInventoryURLIdentifier	Custom URL
ClientInventoryURLMaxCandidates	The Maximum Number of Candidates specified in the Custom URL definition.
LoginID	Login ID of the candidate or user receiving the email

LoginURL	The URL that you access to login to your account
LoginUrlLink	The URL (as a link) that you access to login to your account.
Password	Password of the candidate or user receiving the email
TesterEmail	Email address of the candidate assigned an assessment
TesterName	Name of the candidate assigned an assessment
TestName	Name of the test (assessment) the candidate has been assigned to complete
TesterAssignedEmailReminderDays	Number of days specified in the client record on the **Email Reminder (In Days)** setting.
ToAddresses	Email addresses of external recipients receiving test completed emails (using the Test Completed for External Emails email template). The "ToAddresses" would be the email addresses entered in the **Send Email When Candidate Completes To:** area of the *Step 3 - Assign* tab during the assign process. To see this option the **Send Results to Other Recipients** setting in the Client Information record must be set to Yes. When this setting is set to Yes, the Admin will see the **Send Email When Candidate Completes To:** option during the assign process. Upon test completion, an email will be sent to external recipient emails specified on the *Step 3 - Assign* tab.

Notes:

- The above tokens should always be entered in the email template with "%%" before and after the token name, for example, **%%TestName%%.**
- Not all tokens are available in every email template. When editing the email template, rely on the **Insert Token Into Body** drop-down menu for the list of tokens that are valid for the current email template.

[back to top]

Email Templates Reference

Selected email templates:

Candidate Created	Sent when candidate is created if the option, **Send New Candidate Email** within the Client record is set to Yes.

Candidate Custom URL Notification	Sent to a candidate when they register for an assessment via a Custom URL. Contains a link to the assessment so that the candidate can access the assessment at a later time if their test session is interrupted and they are unable to complete the test in one session. Also provides the candidate with a reminder of the login id they provided when they registered for the assessment.
Candidate Score Reports Available	Notification to the candidate that their score reports are available for review. Used in cases where candidates are to review their own results (such as for personality or career development assessments). Provides the candidate with the login URL so they can easily access their account. The **Allow Candidates to View Score Reports** option in the Client record must be set to Yes.
Test Completed	Notification to the test administrator that a candidate has completed an assessment and the results are available for review.
Test Completed for External Emails	Notification to external recipients that a candidate has completed an assessment. The email also contains a link so that the external recipient can review the assessment results. The option to send results to external recipients is available if the **Send Results to Other Recipients** setting in the Client Information record is set to Yes. When this setting is set to Yes, the Admin will see the **Send Email When Candidate Completes To:** option during the assign process. Upon test completion, an email will be sent to external recipient emails specified on the *Step 3 - Assign* tab.
Tester Assigned	Notification to a candidate that they have been registered to complete an assessment. Provides the candidate with the client name (name of the company who registered them for the assessment), the name of the assessment they are to complete, and a link to the assessment. The candidate can click the link to take the assessment and may use it to access the assessment later if they are unable to complete the assessment in one session. This email is sent to the candidate (as well as a copy to the Test Administrator) is sent if the **Send Tester Assigned Email** setting within the Client settings is set to Yes.

Tester Assigned Reminder	Sent to the candidate if they have not started an assessment they are registered for within a specific number of days, specified by the **Email Reminder (In Days)** setting under Client settings. This email is sent if the **Send Tester Reminder Email** setting within the Client settings is set to Yes.
URL Max Reached	Sent to the test administrator when the maximum is reached for a Custom URL. This email is sent if the **Maximum Number of Candidates** is specified for a Custom URL AND the **Notify When Maximum Reached** option within the Custom URL definition is set to Yes. The email will be sent when someone attempts to access the URL AFTER the maximum has been reached. See [Creating Custom URLs](#) for more details.
URL No Qty	Sent to the test administrator when all available inventory has been consumed when using a Custom URL. This email is sent if the **Notify When All Purchased Quantity Administered** option within the Custom URL definition is set to Yes. The email will be sent when someone attempts to access the URL AFTER the inventory has been depleted. See [Creating Custom URLs](#) for more details.

[back to top]