

Using the PAN System CUSTOMIZING EMAIL TEMPLATES

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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

- 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

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



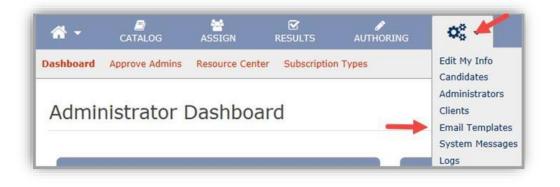
• "Client Settings" Email templates include:

-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



	Assignment - Candidate	Final 360 Keminder (Participant)	
	Assignment - Candidate	Final 360 Reminder (Subject)	
	Candidate	Final Assessment Reminder	
	Assignment - Candidate	First 360 Reminder (Participant)	
(a)]	Assignment - Candidate	First 360 Reminder (Subject)	

To customize an Email Template:

- 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.

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Address											
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%ClientNa	ame%	% Te	st Re	gistr	ation R	emind	ler				
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- 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.

C Address:	
CC Address:	
%AdminEmail%%	
nail Subject: %ClientName%% Test Registration Reminder	
	y/Paste Warning
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It has been %%TesterAssignedEmailReminderDays%% days since you were contacted to comple assessment. Please complete the assessment as soon as possible, or contact your administrator i questions.	
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assessment. Please complete the assessment as soon as possible, or contact your administrator i questions. You have been registered to take an assessment for %%ClientName%%. The assessment(s) you the %%TestName%%, and I am <mark>%%AdminName%%,</mark> your Test Administrator.	f you have
assessment. Please complete the assessment as soon as possible, or contact your administrator i questions. You have been registered to take an assessment for %%ClientName%%. The assessment(s) you the %%TestName%%, and I am <mark>%%AdminName%%,</mark> your Test Administrator. To take the assessment, click the following link: %%BatteryUrlLink%%	f you have are to take is
assessment. Please complete the assessment as soon as possible, or contact your administrator i questions. You have been registered to take an assessment for %%ClientName%%. The assessment(s) you the %%TestName%%, and I am <mark>%%AdminName%%,</mark> your Test Administrator. To take the assessment, click the following link: %%BatteryUrlLink%% Follow the directions on the screen.	f you have are to take is
assessment. Please complete the assessment as soon as possible, or contact your administrator i questions. You have been registered to take an assessment for %%ClientName%%. The assessment(s) you the %%TestName%%, and I am <mark>%%AdminName%%,</mark> your Test Administrator. To take the assessment, click the following link: %%BatteryUrlLink%% Follow the directions on the screen. If you have technical problems reaching the assessment, go to %%LoginUrlLink%% and click on th	f you have are to take is



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"

n Address:	
n Address: AdminEmail%%	
Address:	
Address:	
AdminEmail%%	
il Subject:	
ClientName%% Test Registration Reminder	
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%TesterName%%, has been %%TesterAssignedEmailReminderDays%% days since you were contacted to complete your ssessment. Please complete the assessment as soon as possible, or contact your administrator if you have uestions.	
ou have been registered to take an assessment for %%ClientName%%. The assessment(s) you are to take ne %%TestName%%, and I am your Test Administrator.	e is

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.

Insert Token Into Body: AdminName Insert
Send Email Preview
Save Save As Cancel
Insert Token Into Body: AdminName
Send Email Preview
Save Save As Cancel
Save As X
New Template Name: First Assessment Reminder - REV ×
OK Cancel



- 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 nonfunctioning 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.



Using the PAN System CUSTOMIZING EMAIL TEMPLATES

QUESTIONS?

Contact Your PAN Account Representative