

How to Create an Email Template

PORTERS Trial expires in 315 days Catherine Porters Apps ?

Client Recruiter Job Person Resume Process Sales Activity

Job List (8) Filter [Customize View](#)

Open(0) Close(3)

Sample Job

Job Sent 2 1st Inter

Matching

Matching

Resume ID Resume Title Phase

10009 Meg Tanaka(10009) Open

Taro Yamada(10010) Open

Tommy February(10004) Entry

Add Process

Document

Email to Person

Email to Recruiter

Add New

Sample Job 03

Job Sent 2

Client	Sample Client 01
Position	Sample Job 03
Salary Details	Sample Salary Details
Work Location	Tōkyō
Permission	Publish (Real Name)
Job Owner	N/A Catherine Porters

Matching

Sample Job 04

Client	Sample Client 01
Position	Sample Job 04
Salary Details	Sample Salary Details
Work Location	Tōkyō
Permission	Publish (Real Name)
Job Owner	N/A Catherine Porters

Matching

Phase Close

Phase Date 2014/10/31 17:00:00

Phase Memo

To launch the send mail screen.

✖ This is not for creating mail template

✖ The saving location of the mail template is different according to the place where the mail send screen is launched.

Therefore, the mail templates saved at the mail send screen of resume and job are not the same.

The following functionalities were added on the 25th of August.

We are currently updating the manual regarding these new features.

- Reply To Setting
At the right side of "From", the "Reply To Settings" link is added.
When this is clicked, "Reply To" setting is added in between the "From" and "To".
Only 1 mail address can be set.
- Bcc Setting
"Bcc" is added in between "Cc" and "File". The usage is the same as "Cc".
Only "User" mail address can be set.
- Attachment Name Change Setting
After selecting the attachment, the name can be changed.
- Attachment's "Make a zip" and "Set a Password" check setting is saved
"Make a zip" and "Set a Password" check on/off setting is saved in the browser.
The next time the same browser is used to send mail, when an attachment is added, the "Zip Options" setting is the same as last time.

✖ There is a possibility that the screen image might change.

✖ In this manual, the default menus displayed are the default settings.

To change the global menu display settings, please refer to the document "How to Customize the Global Menu".

Template (Matching to Person)

Help text for the template

Shared Templates (3)

e-mail magazine

Share

Job E-mail (Default)

Share

Job E-mail(Bulk)

Share

My Templates (0)

Send

From

porters

<hrbc-support@porters.jp>

To

Meg Tanaka <e1@porters.jp> x

Meg Tanaka <keitai@porters.jp> x

Cc

File

Subject

Don't share mail

Share mail

Signature

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

Process

Phase

Update the latest Phase:

Process Date

NOW

Process Memo

This content will be updated in Process Memo

End Flag

Close

End Reason

Success

Client NG

Person NG

Job Consultant NG

Person Consultant NG

If there is no Process, update will not be performed

When you add new template, click the "Add New template in My Template list"

※There are no copy function.

Add New template in My Template list +

Template (Matching to Person)
Help text for the template

Shared Templates (3)
e-mail magazine
Job E-mail (Default)
Job E-mail(Bulk)

My Templates (0)

Don't share mail

Share mail

From

porters

<hrbc-support@porters.jp>

To

Mag Tanaka <at@porters.jp>

Mag Tanaka <kaitai@porters.jp>

Signature

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

the latest Phase:

Date

NOW

Memo

ent will be updated in Process Memo

on

is

Client NG

Person NG

nsultant NG

Consultant NG

no Process, update will not be

d

Template - New

Type

Matching to Person

Name

Job E-mail

Subject

▶ User

▶ Company Profile

▶ Client

▶ Recruiter

▶ Job

▶ Person

▶ Resume

In the Mail Template-New dialog,
enter the " Name "

※This is for internal use only and will not be
shown in the actual mail.

Updated by: --

Updated Date: --

Created by: --

Created Date: --

Save

Save & Apply

Cancel

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

Process

te the latest Phase:

ss Memo

End Flag

Close

End Reason

Success

Client NG

Person NG

Job Consultant NG

Person Consultant NG

Add New template in My Template list +

Template (Matching to Person)

Help text for the template

Shared Templates (3)

e-mail magazine

Job E-mail (Default)

Job E-mail(Bulk)

My Templates (0)

Don't share mail

Share mail

From

porters

<hrbc-support@porters.jp>

To

Ms. Tanaka <sa1@porters.jp>

Ms. Tanaka <sa2@porters.jp>

Signature

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

Update the latest Phase:

Process

Phase

Update the latest Phase:

Process Memo

End Flag

Close

End Reason

Success

Client NG

Person NG

Job Consultant NG

Person Consultant NG

Template - New

Type Matching to Person

Name Job E-mail

Subject Career Opportunities

Updated by: --

Updated Date: --

Created by: --

Created Date: --

Save

Save & Apply

Cancel

Enter the "Subject". This will be the email title.

Add New template in My Template list +

Template (Matching to Person)
Help text for the template

Shared Templates (3)
e-mail magazine
Job E-mail (Default)
Job E-mail(Bulk)

My Templates (0)

Don't share mail
Share mail

Signature

Phase Update
Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

Template - New

Type Matching to Person Name Job E-mail

User
Company Profile
Client
Recruiter
Job
Person

Person ID
Person Owner
Person Name
Memo
Zip Code (Person)

Subject Career Opportunities

{{Person.P_Name:Person Name}}

We have a job you may be interested in !

This is {{User.P_Name:Name}} of {{Company.P_Name:Company Name}}.

{{Person.P_Name:Person Name}}, we would like to introduce you to a new opening which suits your skills and experience.
Please contact{{User.P_Name:Name}} if you are interested in the opportunity.

We look forward to hearing from you.

Job Information

Updated by: -- Updated Date: --
Created by: -- Created Date: --

Save Save & Apply Cancel

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

Process

Phase
Update the
Process M

End Flag
☐ Close

End Reason
☐ Success ☐ Client NG ☐ Person NG
☐ Job Consultant NG
☐ Person Consultant NG

Directly edit the content.

ds that can be used are available on
t side of the dialog. Click the desired
n the right, and the tag will then be
displayed in the content.

ctual mail, the value of the field will
displayed and not the tag itself.

Template (Matching to Person)

Help text for the template

Shared Templates (3)

- e-mail magazine
- Job E-mail (Default)
- Job E-mail(Bulk)

My Templates (0)

Template - New

Type Matching to Person Name Job E-mail

Subject Career Opportunities

☐ User
☐ Company Profile
☐ Client
☐ Recruiter
☐ Job
☒ Person

{{Person.P_Name:Person Name}}
 We have a job you may be interested in !
 This is {{User.P_Name:Name}} of {{Company.P_Name:Company Name}}.
 {{Person.P_Name:Person Name}}, we would like to introduce you to a new opening which suits your skilss and experience.
 {{Person.P_Name:Person Name}} if you are interested in the

Updated Date: --
Created Date: --

Save & Apply Cancel

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

☒ Process

Phase
Job Sent

Process Memo

End Flag
☐ Close

End Reason
☐ Success ☐ Client NG ☐ Person NG
☐ Job Consultant NG
☐ Person Consultant NG

■ Automatically update Process after sending E-mail:

When this option is checked, after the template is used and the mail is sent, the process is automatically updated.

■ Process

When sending the email, the phase of the selection process will be selected in the dropdown.

■ Process Memo

When sending the email, enter a memo that you wish to save.

■ End Flag

When sending email, the End Flag can be set.

■ End Reason

When the end flag is set, select the reason.

Template (Matching to Person)

Help text for the template

Shared Templates (3)

e-mail magazine

Job E-mail (Default)

Job E-mail(Bulk)

My Templates (0)

Don't share mail

Share mail

Signature

From

porters

<hrbc-support@porters.jp>

To

Mr. Tanaka <ta1@porters.jp>

Mr. Tanaka <ta2@porters.jp>

Template - New

Type

Matching to Person

Name

Job E-mail

Subject

Career Opportunities

▶ User

▶ Company Profile

▶ Client

▶ Recruiter

▶ Job

▼ Person

Person ID

Person Owner

Person Name

Memo

Zip Code (Person)

Address (Person)

Telephone (Person)

Updated by: --

Created by: --

Updated Date: --

Created Date: --

Save

Save & Apply

Cancel

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

Process

Phase

Job Sent

Process Memo

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

the latest Phase:

Date

NOW

ent will be updated in Process Memo

on

is

Client NG

Person NG

nsultant NG

Consultant NG

no Process, update will not be

d

Person Consultant NG

Add New template in My Template list +

Once the template is complete....
To save the template, click the "Save" button,
To save and apply for the mail click the "Save & Apply" button.
Do not save the template and back to the mail dialog, click the "Cancel" button.

8

Template (Matching to Person)

Help text for the template

Shared Templates (3)

e-mail magazine

Share ✓

Job E-mail (Default)

Share ✓

Job E-mail(Bulk)

Share ✓

My Templates (1)

✕ Job E-mail

Default

Share

Add New template in My Template list +

☐ Don't share mail
 ☒ Share mail

Send

From

porters

<hrbc-support@porters.jp>

To

Meg Tanaka <e1@porters.jp> x
 Meg Tanaka <keitai@porters.jp> x

Cc

File

Subject

Signature

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

☐ Process

After creating the template, the screen the template will be displayed under the "My Templates"

■ Set as Default Template

In case this is checked, when the Create Mail dialog is launched, this template is automatically selected.

The default setting, can be set for each user.

✕The default setting is dependent on the PC and browser environment.

■ Share

If share is turned on, the template will be shared among all users of the company. Please note that only the creator of template can turn share on but both the system administrator and the creator can turn share off.

■ Pencil button

It is available to edit the template.

Standard users are available to edit only own templates.

System Administrators are available to edit own templates and shared templates.

■ ✕ button

It is available to delete the template.

Standard users are available to delete only own templates.

System Administrators are available to edit own templates and shared templates.

Template (Matching to Person)

Help text for the template

Shared Templates (3)

e-mail magazine

Share

✓

Job E-mail (Default)

Share

✓

Job E-mail(Bulk)

Share

✓

My Templates (1)

Job E-mail

Add New template in My Template list +

Send

From

porters

<hrbc-support@porters.jp>

To

Meg Tanaka <e1@porters.jp> x

Meg Tanaka <keitai@porters.jp> x

Cc

File

Subject

Career Opportunities

Don't share mail

Share mail

Signature

porters

test

Manager

Meg Tanaka

We have a job you may be interested in !

This is Catherine Porters of 英語版 マニュアル

Meg Tanaka, we would like to introduce you to a new opening which suits your skilss and experience.
Please contactCatherine Porters if you are interested in the opportunity.

We look forward to hearing from you.

■Job Information

【Company Name】

Sample Client 01

【Position】

Sample Job 01

【Job Detail】

Sample Job Summary

【Business Summary】

Sample Business Summary

【Number of Employees】

Sample Number of Employees

【Location】

Sample Work Location Details

When you add or edit the Signature information, click the「Signature」and Manager.

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

Process

Phase

Job Sent

Process Date

2015/08/06

14:10

NOW

Process Memo

End Flag

Close

End Reason

Success

Client NG

Person NG

Job Consultant NG

Person Consultant NG

A new Process will be added

Template (Matching to Person)
Help text for the template

Shared Templates (3)
e-mail magazine
Job E-mail (Default)
Job E-mail(Bulk)

My Templates (1)
Job E-mail

Add New template in My Template list +

Don't share m

Send



Meg Tanaka
We have a job yo
This is Catherine
Meg Tanaka, we v
Please contactCat
We look forward t
Job Information
Company Name
Position Samp
Job Detail
Sample Job Summ
Business Summ
Sample Business
Number of Emp
Location Sam

Mail - Signature

Signature

porters
test

Add New +
Edit
Delete

Add New Signature : Click the "Add New"
Edit the Signature : Click the 
Delete the Signature : Click the 

Close

Signature

Phase Update
Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

Process
Phase
Job Sent
Process Date
2015/08/06 14:10 NOW
Process Memo

End Flag
Close
End Reason
Success Client NG Person NG
Job Consultant NG
Person Consultant NG
A new Process will be added

Template (Matching to Person)

Help text for the template

Shared Templates (3)

e-mail magazine

Share

Job E-mail (Default)

Share

Job E-mail(Bulk)

Share

My Templates (1)

Job E-mail

Add New template in My Template list +

Don't share m

Send

Meg Tanaka

We have a job yo

This is Catherine

Meg Tanaka, we v

Please contactCat

We look forward t

Job Information

Company Name

Position Samp

Job Detail

Sample Job Summ

Business Summ

Sample Business :

Number of Emp

Location Sam

Mail - Signature

Signature

porters

test

Add New

Signature - New

Title

Job E-mail

Content

=====

Catherine Porters

TEL:00-0000-0000

E-mail:***@porters.jp

=====

Ok

Cancel

Close

Signature

Phase Update

Automatically update the Phase when sending

End Flag

Close

End Reason

Success

Client NG

Person NG

Job Consultant NG

Person Consultant NG

A new Process will be added

Title : Enter the title of the signature
Content : Enter the signature information

✂The Signature setting, can be set for each user.

Template (Matching to Person)

Help text for the template

Shared Templates (3)

- e-mail magazine Share ✓
- Job E-mail (Default) Share ✓
- Job E-mail(Bulk) Share ✓

My Templates (1)

- Job E-mail

Add New template in My Template list +

Don't share mail

Share mail

Send

From

porters <hrbc-support@porters.jp>

To

Meg Tanaka <e1@porters.jp> x Meg Tanaka <keitai@porters.jp> x

Cc

File

Subject

Career Opportunities

We look forward to hearing from you.

■ Job Information

【Company Name】

Sample Client 01

【Position】

Sample Job 01

【Job Detail】

Sample Job Summary

【Business Summary】

Sample Business Summary

【Number of Employees】

Sample Number of Employees

【Location】

Sample Work Location Details

【Annual Salary (JPY)】

3500000 ~ 5000000

Sample Salary Details

=====

Catherine Porters
TEL:00-0000-0000
E-mail:***@porters.jp

=====

Signature

Job E-mail

porters

test

Phase Update

Automatically update the Phase when sending mail. In case you do not want to update the Phase, please select "Update the latest Phase:"

Process

Phase

Job Sent

Process Date

To check the signature witch you made, click the “Signature” button.

Click the signature which you apply for the mail.
The information will be set under the content.

✂ In case the right side check box is checked, when
the Create Mail dialog is launched, this signature is automatically selected

✂Please choose in the order of 1) template and 2) signature.
If the signature is chosen first instead, it will be
cleared when the template is selected.