Customizing Email Templates within ChequedSuite™
Customizable Email Templates

Chequed.com products use email templates that are pre-programmed to brand to your company within ours. These email templates are sent automatically through the system to your candidates and references. We include tools such as substitution values to customize the candidate and reference experience. These templates are available for modification within your account: Settings – Email Templates. You can create personalized messages from your company to the candidate and include substitution values that can be added or deleted, depending on your preferences. We recommend reviewing these templates and make alterations as needed.

Now that you know what is possible within your account, the following pages will guide you with how to change the templates to meet your company's needs.
Example of Template with Substitution Values

Example of Template with Substitution Values populated
Email templates

These can be found under the Settings tab in your account. Each template available to you shows a Name, a Description with an Orange Magnifying Glass to the left. Hovering your mouse over the Orange Magnifying Glass will allow you to see more functions. In this case, it will allow you to View or Edit this template. Select View.

Viewing an Email Template

In the View of the Email Template, in this example the Candidate Invitation to ChequedSuite™, the system will allow you to see who it is being sent from, and who it is sending to. It will show you the Subject Line, and the Body of the Email template. You may not change the From or To settings, as these are locked inside the program.

You are able to make edits to the Subject line and the Body of the email.


**Substitution Values**

The system uses Substitution Values to allow you to customize the candidate and reference experience. It is critical that when using the Substitution Values, that you copy them exactly as they are displayed including brackets, capital letters. Anything otherwise will break the value, so be sure that you don’t add any extra spaces or characters.

Some examples of Substitution Values and what they mean:

- `{candidateFirstName}` - displays the candidate’s first name.

- `{customText}` - this feature allows the candidate to write a personal note to their reference inside of the otherwise locked template. *In removing this feature, you will also need to check your candidate invitation email to adjust the language.*

- `{link}` - The invitation link that is sent to the candidate.

- `{managerEmail}` – displays your email address.

- `{managerFirstName}` – displays your first name.

- `{managerLastName}` - displays your last name.

- `{managerPhoneNumber}` – displays your phone number. *Double-check that this has been entered into your account.*

- `{numberOfReferences}` - The number of references that are being requested from the candidate. *This value pulls from your company settings and the settings that are inside the position you have created.*

- `{positionName}` - displays the name of the position.

- `{referenceEmailAddress}` – displays the reference’s email address.

- `{referenceFirstName}` – displays the reference’s first name.

- `{referenceLastName}` – displays the references last name.

- `{siteAddress}` – displays the Chequed.com Login website.
Editing Email Templates

To edit Email Templates, you’ll need to go to the template and select Edit via the Orange Magnifying Glass. This will open up a WordPress editing platform where you have the ability to change the font type, size and other formatting styles.

The WordPress area will also allow you to upload images, such as your logo or a special branding message to enhance the visual effect to the addressee. You are also able to add HTML coding, this is especially helpful if your company has a dedicated IT or Marketing department that controls outgoing messages.

Adding your Logo to Email Templates

There are 5 quick steps to add your Logo into the automated email templates.

1. Have a digital file of your logo handy
2. Upload it to an image posting site, example: postimage.org; imageshack.com, photobucket.com
3. Copy the URL that is provided
4. Select the Insert/Edit icon (tree icon pictured above)
5. Preview settings to ensure sizing and location is displayed correctly
Questions/Comments/Concerns?

Contact Support at Chequed.com with any questions, concerns or feedback.

Helpful Links

Login to Chequed.com: https://app.chequed.com/site/login

Contact Us

Support Email: support@chequed.com
Support Phone: 888-412-0688 x 1013