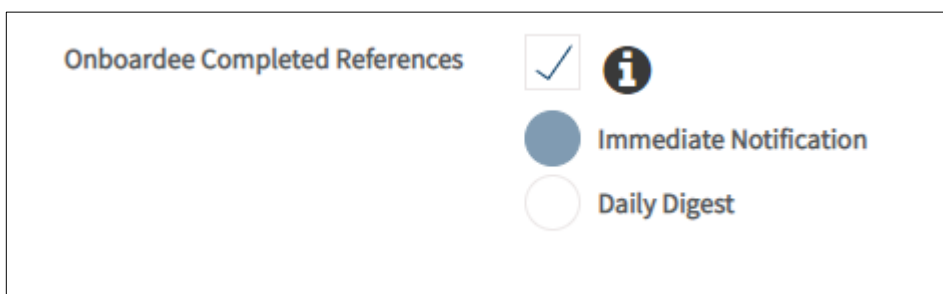


References

This document contains a guide to the References feature in Webonboarding. It covers how to extract reference details from Onboarder processes.

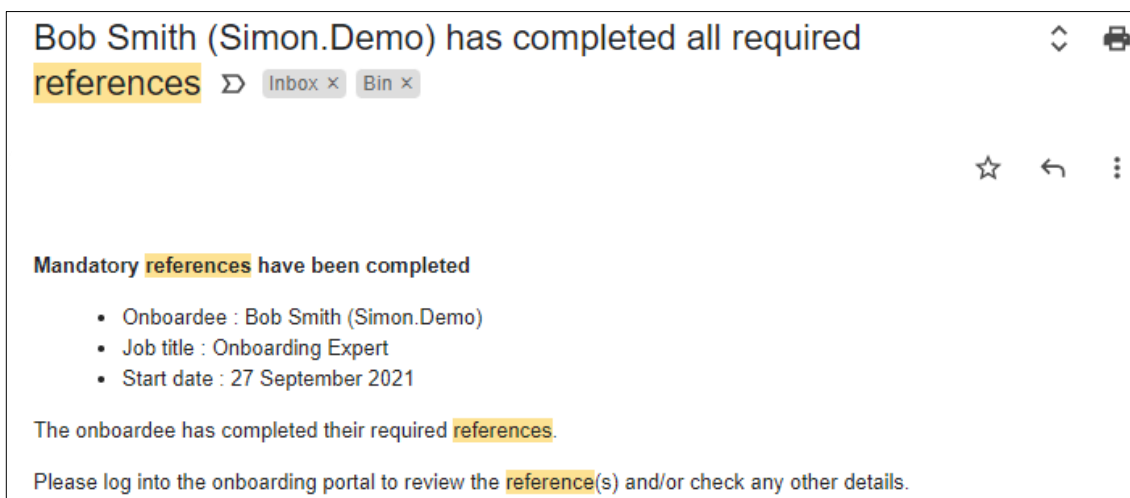
Reference Notifications

Once an Onboarder has fully completed their Reference details in the portal the system will trigger an email to notify the Process Owner that these details have been completed. This email can be an immediate notification or sent as a Daily Digest. To adjust these settings use the drop down menu at the top right to access 'My Settings' and navigate to the 'Email' tab.



Then set the frequency for the Onboarder References Complete notification.

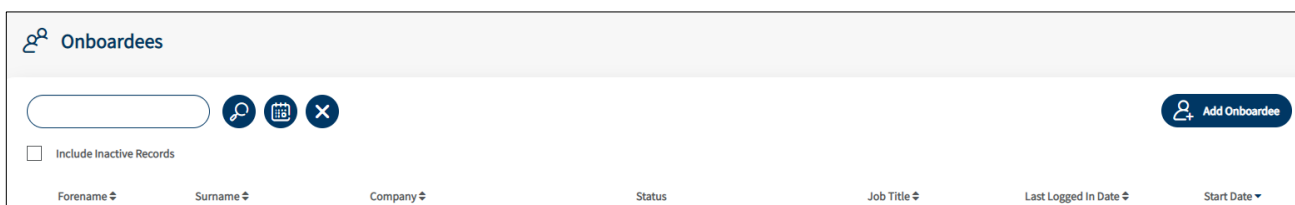
The immediate notification email will be similar to the below example



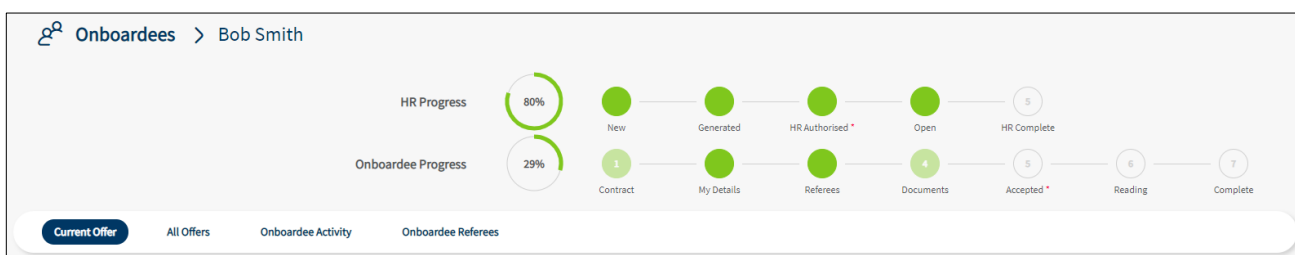
Extracting Reference Details

You can extract reference information from the system at any time although we recommend waiting until the Onboarder has completed all details and their Declaration.

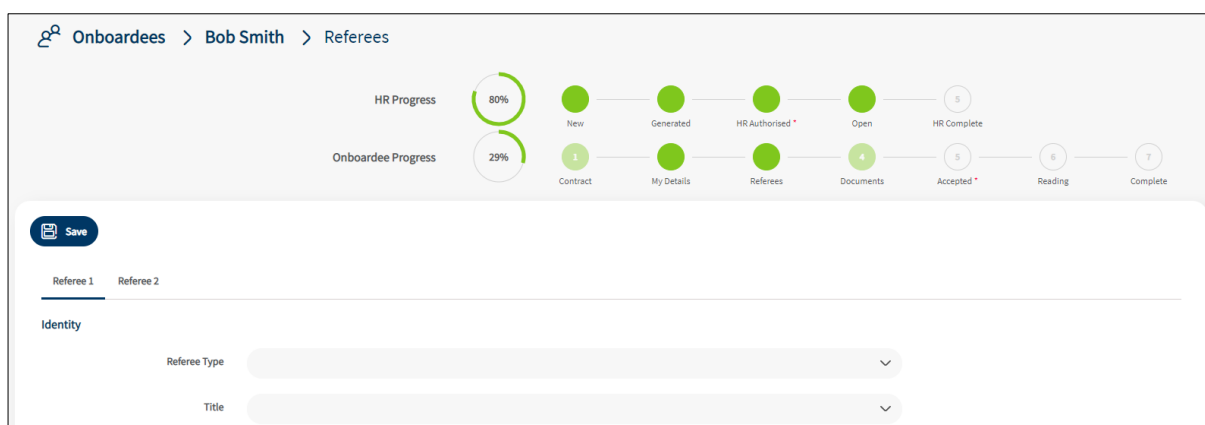
To extract information for a specific Onboarder, navigate to 'Onboarders' in the menu. From here you can either select the Onboarder from the list or search for the Onboarder using the search box.



Once inside the Onboarder record you will see a section called Onboarder References.

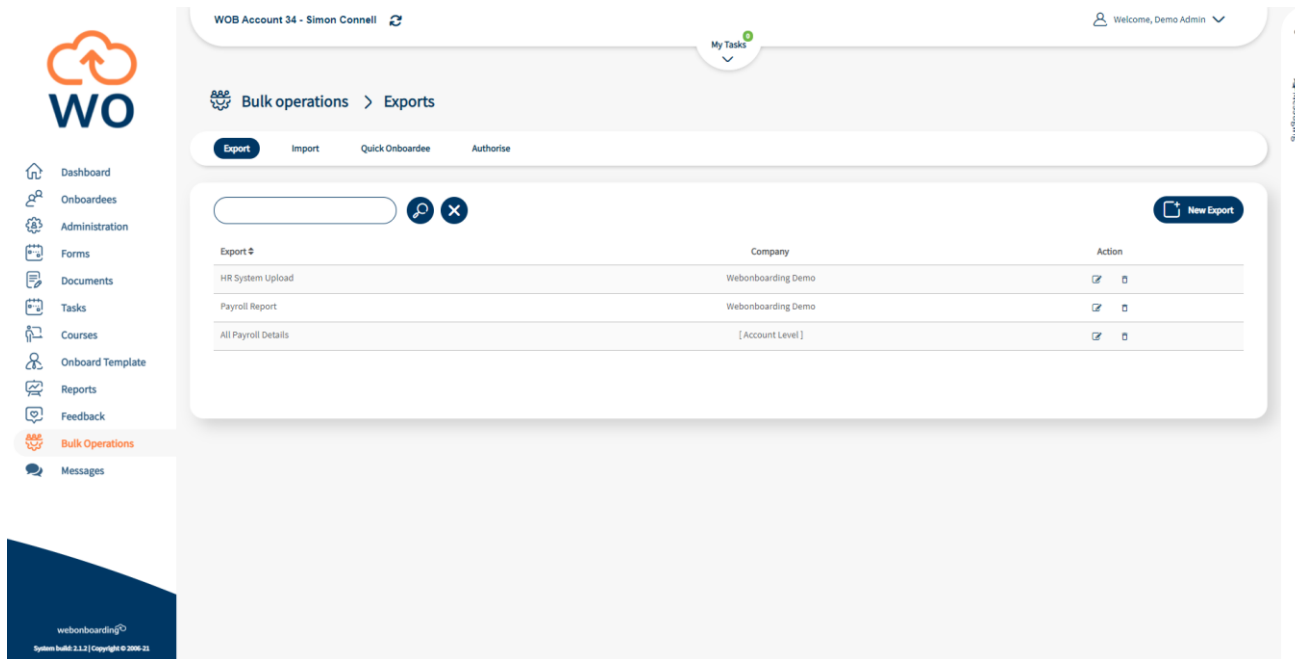



When you select this option you will be taken to a screen showing the information that has been added. You can use the tabs to show the details for each reference individually. You can then copy this information out to begin your reference process.



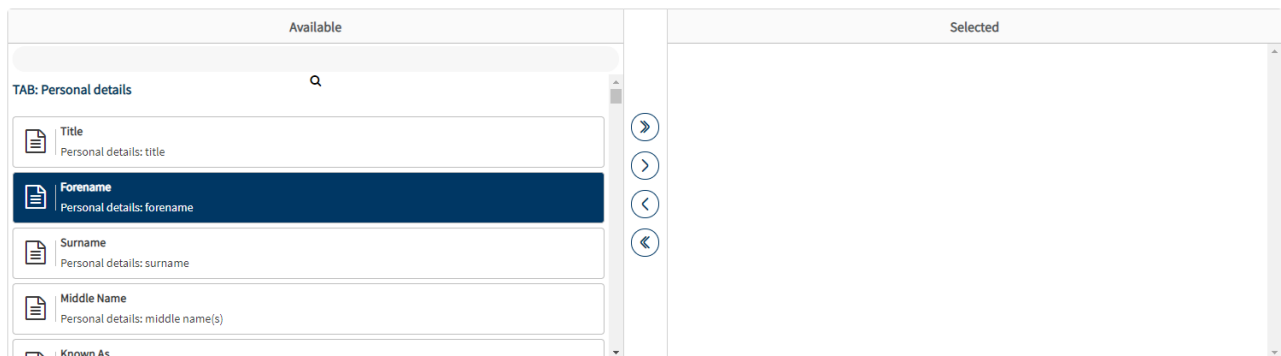
Bulk Reference Extraction

You can also extract Reference data in bulk via the Export section in Bulk Operations.



When setting up the Export you can select columns to add by either double clicking on the heading or clicking on the heading and use the single arrow  to move it to the Selected table. You can also use search function to find the 'Reference' section in the Available section.

Columns



For more details on setting up customised Exports please see our Exports User Guides on the [Support Hub](#).