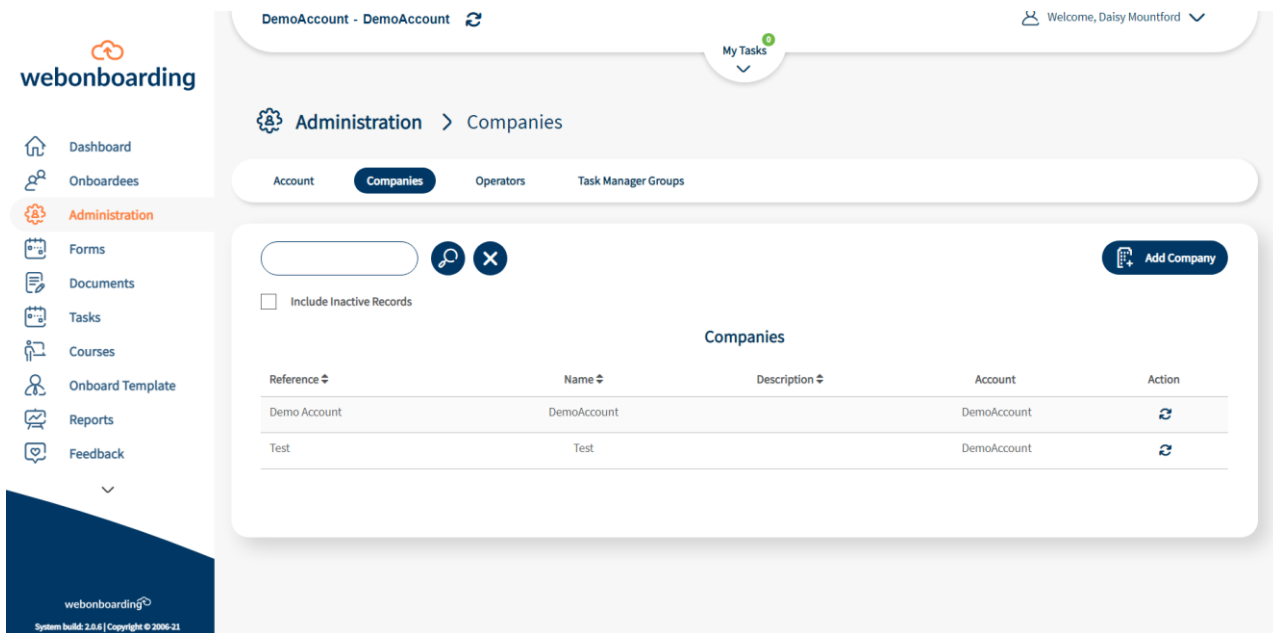


## Customising Emails

In Webonboarding you can customise certain email templates that get sent to users of the system. This allows you to tailor the wording of the communication sent from the system to your Onboardees and internal Operators and add things like company signatures to the messages. This document contains guide on how to use this feature.

### Email Customisation

From the Menu, navigate to Administration. You can customise at Account (System Admin only) or Company level. Account level customisations are the default used across an Account unless customisations are setup at Company level. Navigate to the relevant Account or Company depending on where you want the customisation to apply.



The screenshot shows the Webonboarding Administration interface. The left sidebar contains a navigation menu with items: Dashboard, Onboardees, Administration (highlighted), Forms, Documents, Tasks, Courses, Onboard Template, Reports, and Feedback. The main content area is titled 'Administration > Companies' and has tabs for 'Account', 'Companies' (selected), 'Operators', and 'Task Manager Groups'. Below the tabs is a search bar with a magnifying glass icon and a close button. There is a checkbox labeled 'Include Inactive Records' and an 'Add Company' button. A table titled 'Companies' is displayed with the following data:

Reference ↕	Name ↕	Description ↕	Account	Action
Demo Account	DemoAccount		DemoAccount	
Test	Test		DemoAccount	

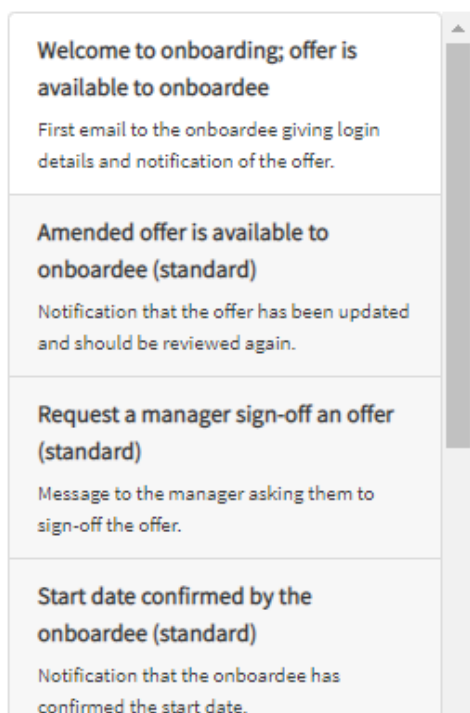
From here navigate to the Email Templates tab and select the Edit button to make changes.



## Templates

On the left hand side you will see a list of all of the templates that are available to edit within Webonboarding with a brief description of the email to help identify the one you want to edit. Emails that are already customised will have a white background, while those using the default template will be grey.

### Templates



<b>Welcome to onboarding; offer is available to onboarder</b> First email to the onboarder giving login details and notification of the offer.
<b>Amended offer is available to onboarder (standard)</b> Notification that the offer has been updated and should be reviewed again.
<b>Request a manager sign-off an offer (standard)</b> Message to the manager asking them to sign-off the offer.
<b>Start date confirmed by the onboarder (standard)</b> Notification that the onboarder has confirmed the start date.

A full list of emails and what triggers them is available on the [Support Hub](#).

## Detail

This section shows the detail of the selected email template. You are able to edit the subject line as well as the body of the email. The editor also includes a simple array of formatting tools and a preview feature to help you understand what the email will look like in practice.

### Detail




CC

Subject \*

Your offer of employment is available 

Template \*

File ▾ Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾

**B** *I* A A Verdana 8pt Formats ▾   

Dear **\$firstName**,


Following our **discussion** you will be provided with access to our secure onboarding portal where you can go through an example process as an onboarder. However, please do not enter any real **personal** identifiable information even if prompted.

You will soon receive an email that will contain a link for you to set your password, be sure to enter **in** your username exactly as shown below.

- Username: **\$username**



If you have any questions please contact us on **\$hrPhoneNumber** during office hours.

Kind regards,  
The Webonboarding Team

**webonboarding** 

+44 (0)800 1700 800  
[www.webonboarding.com](http://www.webonboarding.com)

This message is intended solely for the individual addressee named above. If you are not the intended recipient please delete. The information contained herein has been obtained from sources we believe to be reliable but we do not represent that it is accurate or complete, and therefore, Signifo Ltd, and staff cannot be held responsible or liable for the contents of this message.

WORDS: 181

Reset to Default

Simply type in the relevant section to alter wording or add additional information. You can even insert images to replicate your company email signature within the email template. You can also use the 'Reset to Default' button to reset the template.

## Merge Fields

When editing emails you may notice several highlighted sections within either the Subject or Template sections. These are Merge Fields which can be used to personalise the messages from the system by utilising data that is held within Webonboarding including Additional Fields that might have been added.

You can add your own Merge Fields to an email using the section on the right hand side.

### Merge Field

First name



Add to Subject

Add to Template

To add a Merge Field simply place the cursor in the position you want the Merge Field to go, use the drop down menu to select the required Merge Field and then select either the Add to Subject or Add to Template button as required.

There is a full list of the email templates available in the system available on the Support Hub with a list of [Onboarder](#) emails and internal [Operator](#) emails which can be used to decide on your changes to the wording before editing the templates in Webonboarding.

NB – Please avoid removing ‘\$username’ and merge fields that are links as Onboarders will need these to access the system.