

How To Set Up A Welcome Email

Welcome email set-up

How to get there?

On your Home screen click on System Administration (1), With your cursor hover over the System Administration (2), then navigate to Notifications (3) | Emails (4) | Notification - Templates (5).

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What to do?

- From the drop down menu search and select System Access (1).
- Click on the Search button (2).

☰ Template List

[Section List](#) » [Module List](#) » [Template List](#)

Search

Search

Section

Human Resources



1

Module

System Access



2

Search

Clear

- Search through the list for the SECURITY_ADMIN_PASSWORDRESET_WELCOME (3) email, this is the welcome email.
- From this screen you will be able to Select the subject for your email (4).
- You can edit the From E-mail Address (5).
- Remember to enable the email by clicking on the tick box (6).
- You will also be able to Copy and Preview (7) the email.
- For more options click on Action (8), a small window will open.
- Click on View / Edit (9).

Previous 20 | Next 20

Action	Name	Reference Description	Description	Subject	From E-mail Address	Enable	Copy	Preview
Action	SECURITY_ADMIN_PASSWORDRESET	Company	Template to send a user a reset link for his/her account	Reset Password	@company.com	<input type="checkbox"/>		
Action	SECURITY_ADMIN_PASSWORDRESET_WELCOME	Company	Template used to send a welcome mail and reset link to an employee	Welcome	info@company.com	<input checked="" type="checkbox"/>		
View / Edit	REGISTRATION	Company	Send out the confirmation link as well as additional information to the user in order to complete the registration process and log in	Signify HR Demo System - Account	info@company.com	<input checked="" type="checkbox"/>		
View / Edit Template Items								
Test Template								

- Enter the From email (10).
- Set up the CC and BCC rules by clicking on the drop down and selected Email and then entering the email address in the next field (11).
- Type in the Subject of your email (12).
- Remember to tick the tick box to Enable the welcome email (13).
- If you entered CC and BCC rules the tick box Apply CC email rules (14) must be ticked.
- Remember to click on the Save (15) button to save all your settings.
- Click on Template Items (16) to edit the email template.
- You will be directed to a new window.

Important: Do not edit any information other than the instruction given above, unless you are sure what to do, otherwise the welcome emails may not be sent.

Template Detail

Template Items

Documents

Error Log

Test

Save Template D

16

Save Add New

Saves the template, and clears the fields

Copy Template

Copies the template

Back

Name

SECURITY_ADMIN_PASSWORDRESET_WELCOM *

Reference Description

Company

Description

Template used to send a welcome mail and reset link to an employee

Recipients

Recipients

User Reset URL - Get the details and reset url for th

From

10

info@company.com *

To

Email

And

*

CC

11

And

BCC

And

Subject

12

Welcome *

Enabled

13

☒

Template Style

Apply CC email rules

14

☐

Enable notification protection

☐

15

Save

Save Add New

Copy

Back To List

- In the new window click on Body (17) to edit the welcome email body.

Click on System Administration (1), with your cursor hover over System Administration (2), then navigate to Users (3) | Manage Users (4).

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What to do?

Switch Schema

Search

Schema

Category

Employee Number

Employee Name

Username

- If you would like to ignore users before a specific date, then tick the box at Ignore users created / imported before this date (2). Select the before date in field (3).

It is important to untick the tick box (2) when no users should be ignored.

The options that can be selected when sending a welcome email are:

1. Send the welcome message to all users (4).
 - The **welcome notification** will be sent to:
 - All users who have not received it before.
 - And that were created / imported after the date specified above (if applicable).
 - Click on Confirm to continue.
2. Send the welcome message only to users that I have selected. (5)
 - The **welcome notification** will be sent to:
 - Only users that have been selected.
 - And who have not received it before.
 - And that were created / imported after the date specified above (if applicable).
 - Click on Select Users to continue.
3. Send the welcome message to all users, but exclude users that I have selected. (6)
 - The **welcome notification** will be sent to:
 - All users who have not received it before.
 - And that have not been excluded.
 - And that were created / imported after the date specified above (if applicable).
 - Click on Select Users to continue.

Click on Click on Continue To Next Step (7) to continue.

Important: If the user has already received a welcome email, they will not receive one again irrespective of what option is selected below.

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- Search for the user you would like to select by typing their Username (8).
- Use the tick box Select Username (9) to select all the visible employees (9).
- Or select the users one by one by ticking the tick box (10).
- You can see the number of Users Selected (11).
- Click on Clear Users (12) to clear all the Users Selected (11).
- Click on Continue To Next Step (13) when all the users were selected.

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- Tick I confirm that my selection is correct (14).
- Click Export Users That Will Receive Notification (15) to save the list.
- Click on Send Welcome Notifications (16).

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When appointing new employee (Quick)

How to get there?

Click on System Administration (1), then with your cursor hover over Modules (2) and click on Manage Employees.

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What to do?

- Click on Appoint new Employee (Quick) (1).

Important: You will only be able to send the welcome email when using the quick appoint option (1)

Activate Subgroup All Employees Activate

Switch Schema

Search Employees

☒ Current Employees ☐ Previous Employees ☐ All

Employee Number Name Surname ID Number

Job Code Position

Search Clear

Loading iNote...

Appoint New Employee Appoint Employee Being Transferred **Appoint new Employee (Quick)**

- Enter the employees details (2).
- Enter a valid E-mail Address (3) for the employee.
- Select the box Send Welcome Notification (4).
- Click on Save and go to Employee Profile (5).



Appoint New Employee (Quick)

Appoint employees, supplying only the minimum information.

NOTE: An employee record, an appointment record and a user record will be created.

If required, a welcome notification can be sent to the employee being appointed, allowing them to reset their password on first login.

Employee Number (Automatically assigned when saved) ☐ Override Employee Number

Surname *

Name *

ID Number

Race

Gender

Passport Number

Position *

Location in Organisation *

E-mail Address support@signify.co.za

Mobile Number

Send Welcome Notification ☒

Allow System to generate password for user ☒

5 Save and go to Employee Profile Save and Appoint Another Back to Employee List

Revision #1

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