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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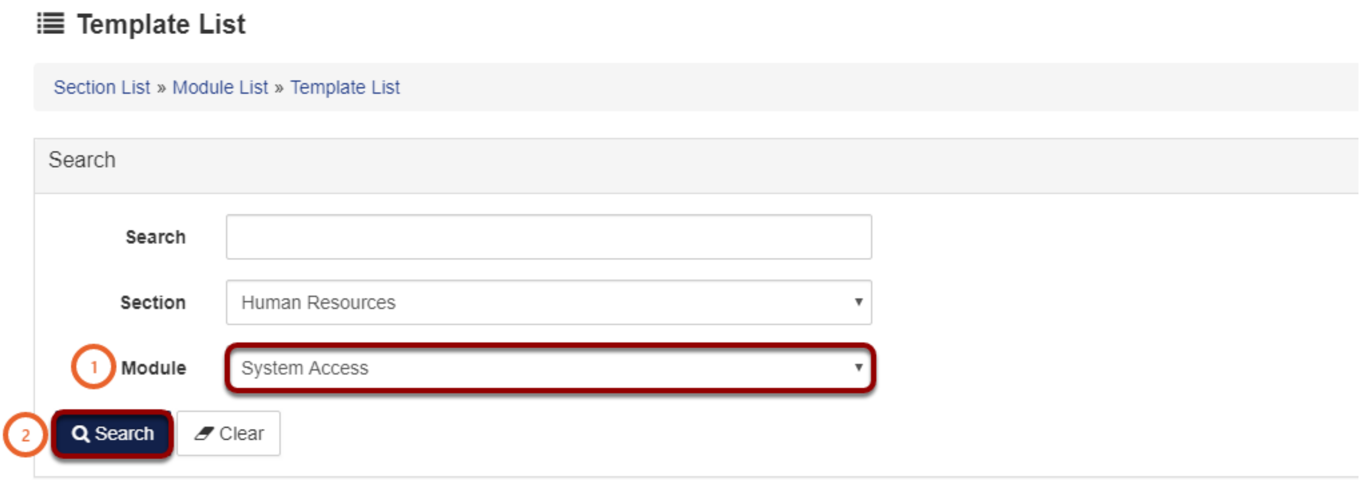
What to do?

- 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

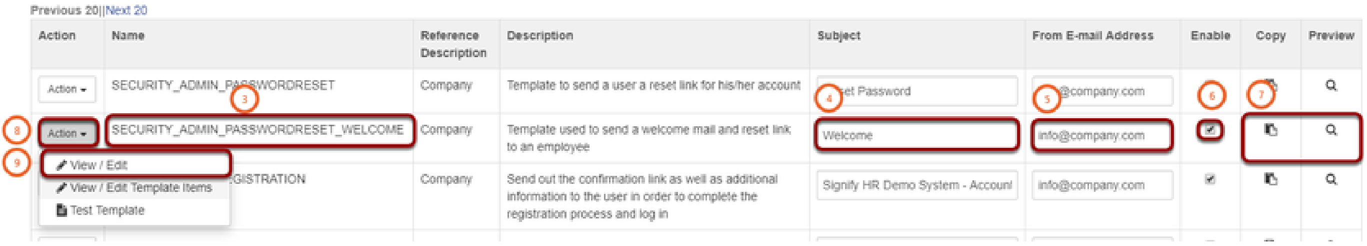
Search

Search

Section Human Resources

① **Module** System Access

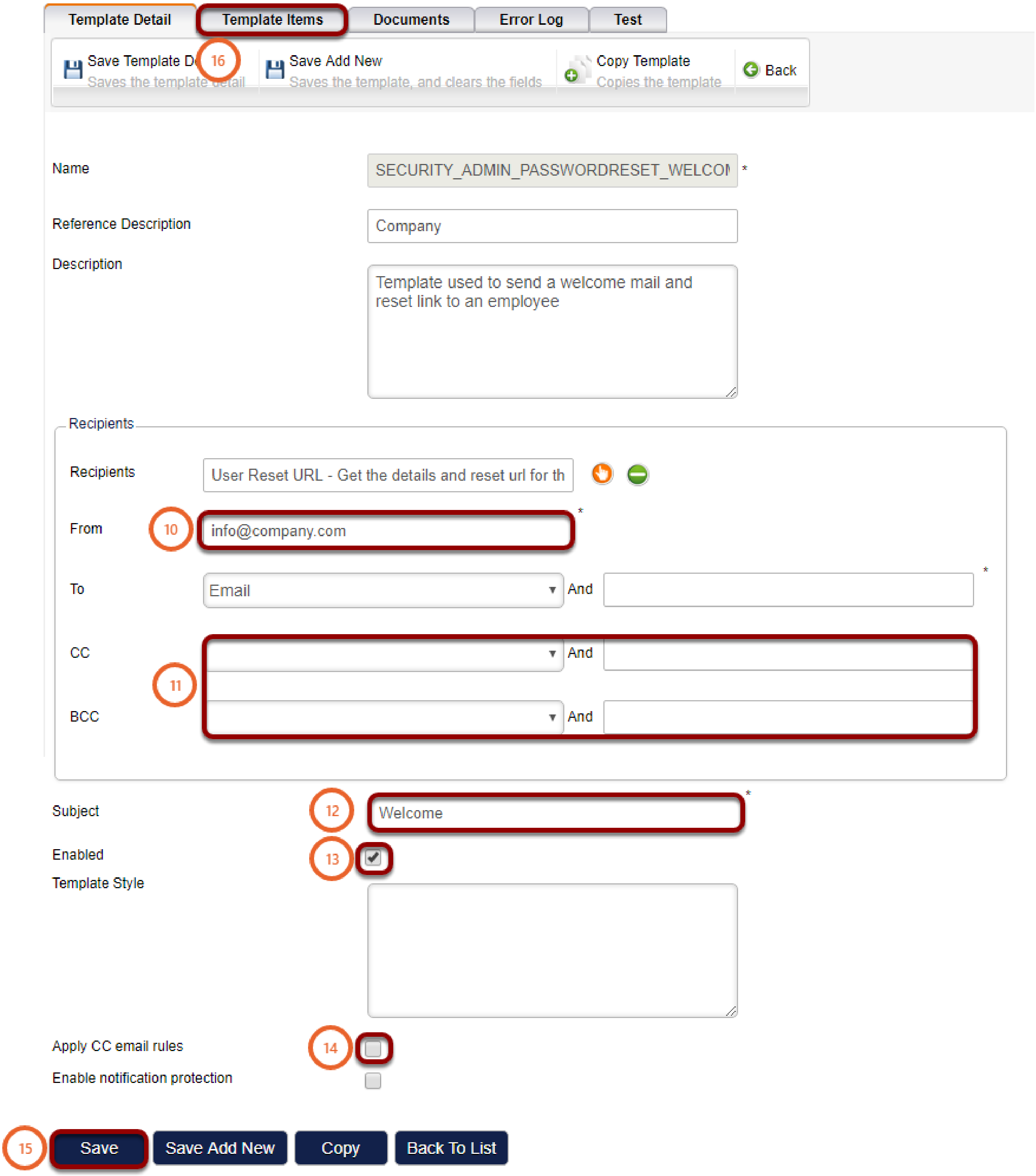
- Search through the list for the SECURITY_ADMIN_PASSWORDRESET_WELCOME (3) email, this is the welcome email.
- From this screen you will be able to Select the subject for your email (4).
- You can edit the From E-mail Address (5).
- Remember to enable the email by clicking on the tick box (6).
- You 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).



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	et Password	@company.com			🔍
Action ▾	SECURITY_ADMIN_PASSWORDRESET_WELCOME	Company	Template used to send a welcome mail and reset link to an employee	Welcome	info@company.com	☑	⎘	🔍
	GISTRATION	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	☑	⎘	🔍

- 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
Saves the template detail
16
Save Add New
Saves the template, and clears the fields
Copy Template
Copies the template
Back
10
11
12
13
14
15
Save
Save Add New
Copy
Back To List

Name: SECURITY_ADMIN_PASSWORDRESET_WELCOI *

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: info@company.com *

To: Email And *

CC: And

BCC: And

Subject: Welcome *

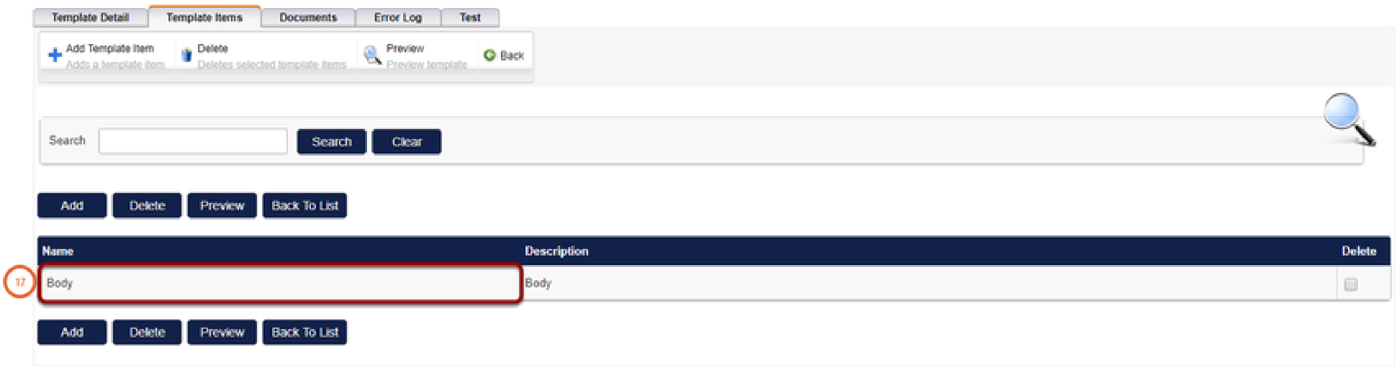
Enabled ☑

Template Style

Apply CC email rules ☐

Enable notification protection ☐

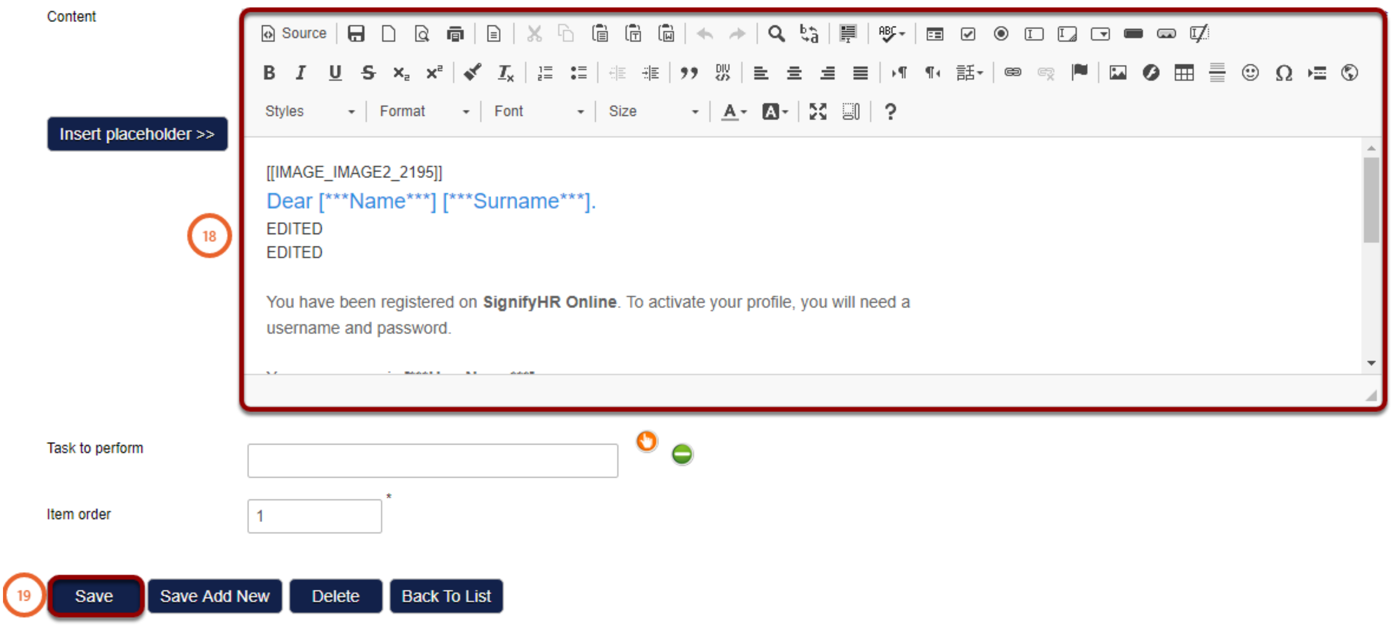
- In the new window click on Body (17) to edit the welcome email body.


Template Detail
Template Items
Documents
Error Log
Test
Add Template Item
Adds a template item
Delete
Deletes selected template items
Preview
Preview template
Back
Search
Search
Clear
Add
Delete
Preview
Back To List
17
Add
Delete
Preview
Back To List

Name	Description	Delete
Body	Body	☐

- Enter your email Content (18) below.
- Remember to click on Save (19) to save your work.

Please do not hesitate to contact support at support@signify.co.za for any assistance.


Content
Source
Styles
Format
Font
Size
Insert placeholder >>
18
19
Save
Save Add New
Delete
Back To List

[[IMAGE_IMAGE2_2195]]
Dear [***Name***] [***Surname***].
EDITED
EDITED

You have been registered on **SignifyHR Online**. To activate your profile, you will need a username and password.

Task to perform:

Item order: 1

Sending welcome email to new users

When users have been imported with Excel

How to get there?

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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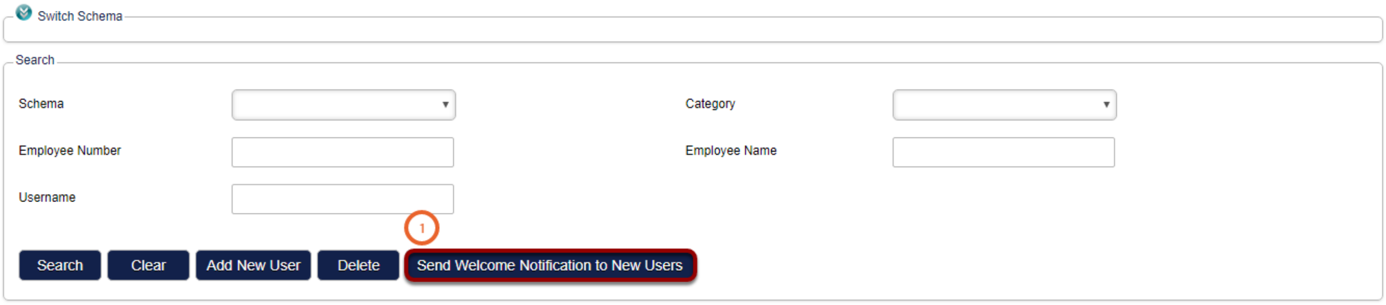
What to do?


Switch Schema
Search
Schema
Category
Employee Number
Employee Name
Username
1
Search
Clear
Add New User
Delete
Send Welcome Notification to New Users

- 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 irrespectively 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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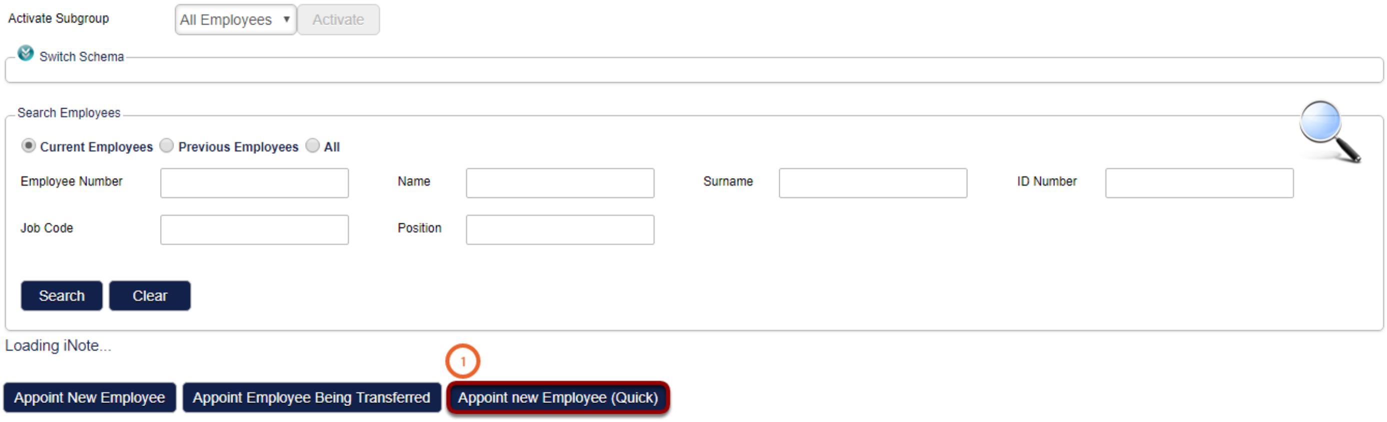
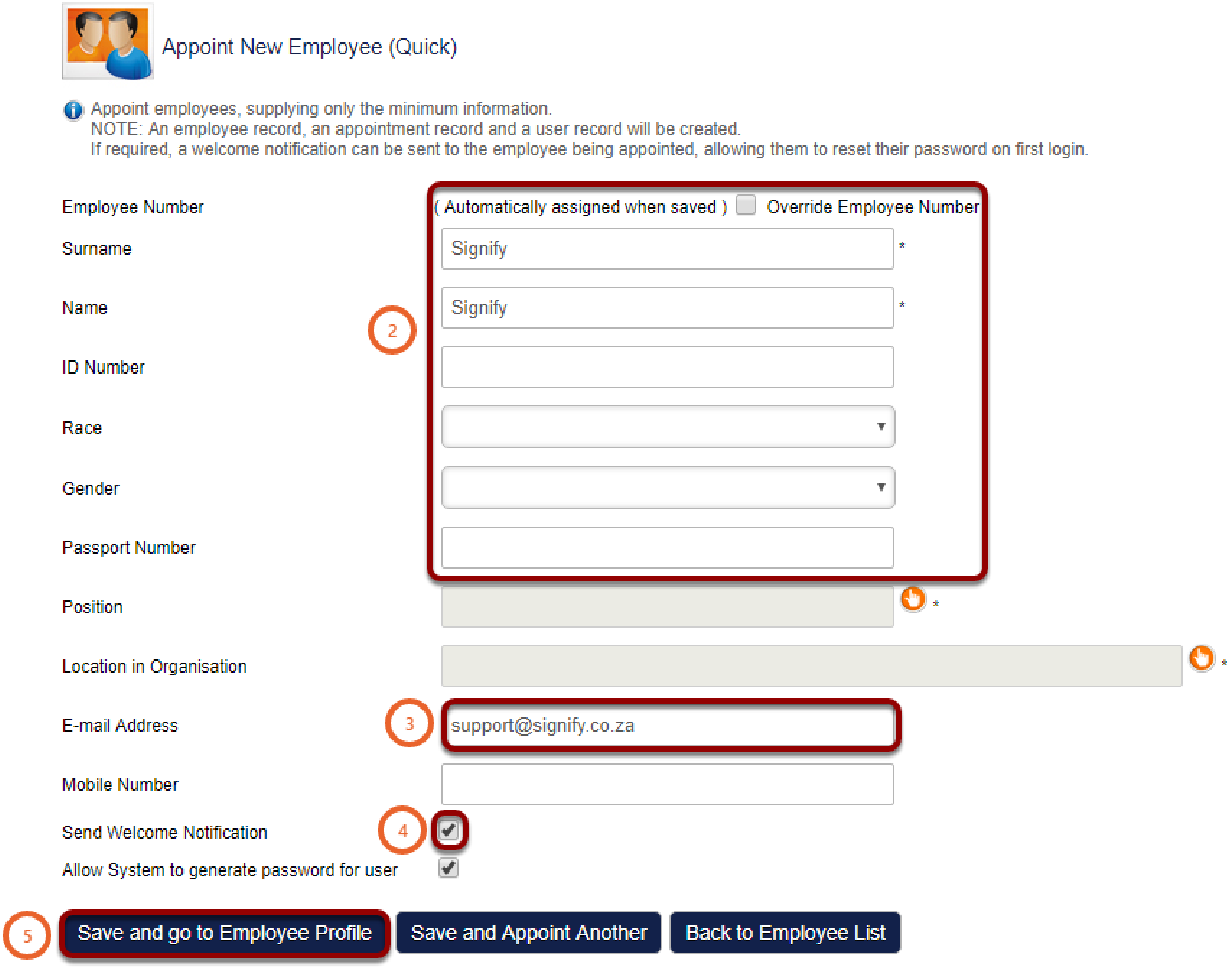
What to do?

- 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...
1
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)
2
3
4
5
Save and go to Employee Profile
Save and Appoint Another
Back to Employee List

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	Signify *
Name	Signify *
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	☑

Revision #1
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