

Quick Help

▪ Enable the offer letter

The screenshot shows a sidebar menu on the left with the title 'Onboarding' and three items: 'ADD EMPLOYEE', 'VIEW EMPLOYEES', and 'MANAGE ONBOARDING'. The main content area is titled 'Manage Your Onboarding Process' and contains a text box with the instruction 'Check the box to enable the offer letter feature'. Below this text box is a checkbox labeled 'Enable Offer Letter' which is checked. A blue arrow points from the checkbox to a blue text label below it that reads 'Check the box to enable the Offer Letter feature'.

▪ View, Edit, Copy or Remove the Offer Letter

The screenshot shows the same sidebar menu as above. The main content area is titled 'Manage Your Onboarding Process' and contains a text box with the instruction 'Check the box to enable the offer letter feature'. Below this text box is a toggle switch labeled 'Enable Offer Letter' which is turned on (YES). Below the toggle switch is a table with three columns: 'Name', 'Status', and 'Action'. The table contains two rows of data. The first row is 'Administrator' with status 'Draft' and action icons for search, edit, copy, and delete. The second row is 'Default Offer' with status 'Active' and action icons for search, edit, copy, and delete. Blue arrows point from the action icons to labels below the table: 'View Offer Letter' (search icon), 'Edit Offer Letter' (edit icon), 'Copy Offer Letter' (copy icon), and 'Delete Offer Letter' (delete icon).

Name	Status	Action
Administrator	Draft	
Default Offer	Active	

Set-up Offer Letter

Step 1 – Add name to the offer letter

Step 2 – Add a logo (Optional)

Step 3 – Create the offer letter

Create offer letter and use preset fields in curly braces{{job.title}}. The fields will be replaced with actual values after the information has been added for the employee.

Step 4 – Add Approver (Optional)

Enable this feature if you would like the offer letter to be sent for approval before it's sent to the new hire. You can enter the name, email and title of the approver. If a signature is required, the approver will be able to sign the offer letter. The Approver can submit a feedback and send it back to the sender. The sender will be notified if the offer letter is rejected. Upon approval, the offer letter is sent to the new hire.

Step 5 – Permissions to Edit

The person who adds the offer letter can edit the offer letter before it goes out. Add others who can edit the offer letter before sending to the new hire.

Step 6 – Signature

Sign the offer letter when adding an employee or add a default signature.

Step 7 – Publish

The offer letter needs to be published before it can be sent to the new hire.

The screenshot shows the 'Create Offer Letter' form with the following sections:

- Name:** A text input field.
- Logo:** A toggle switch (currently on) and a file upload area with a 'Drag and Drop file' instruction and a 'browse' link.
- Offer Letter:** A rich text editor containing the text: "Hello Mike, Can you please set up {{candidate.first_name}} {{candidate.last_name}} computer please they have been onboarded. Thank you,". A 'Preset Fields' sidebar on the right lists fields like Application Date, Candidate Email, Candidate First Name, etc., each enclosed in double curly braces.
- Approver:** A toggle switch (currently on) and input fields for Name, Email, and Title. A 'Signature Required' checkbox is checked.
- Permissions:** A dropdown menu currently showing 'John Welch'.
- Signature:** Two checkboxes: 'The offer letter will be signed when the new employee is added.' (unchecked) and 'Set up a default signature for the offer letter.' (checked).
- Default Signature:** Input fields for Name and Position, and a larger signature box with a 'Click to pop-up signature box' link.
- Buttons:** 'Save Draft', 'Preview', and 'Publish' buttons at the bottom.