Quick Help

- **Enable the offer letter**

- **View, Edit, Copy or Remove the Offer Letter**

▪ **Set-up Offer Letter**

Step1 – 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 feed-back 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.

Create Offer Letter ✕

Name [   ]

Logo [YES]

Drag and Drop file
(.pdf .doc .docx, maximum size 8 Mb)
here or **browse** to begin upload

Offer Letter

Hello Mike,

Can you please set up {{candidate.first_name}} {{candidate.last_name}} computer please they have been onboarded.

Thank you,

Preset Fields
The following preset fields enclosed in double curly braces can be used to specify commonly used fields.

Application Date:
{{application.date}}
Candidate Email:
{{candidate.email}}
Candidate First Name:
{{candidate.first_name}}
Candidate Last Name:
{{candidate.last_name}}
Candidate Phone Number:
{{candidate.phone}}
Company Name:
{{company.name}}
Job Location:
{{job.location}}
Job Title:
{{job.title}}
Sender Email:
{{sender.email}}
Sender Phone:
{{sender.phone}}
Sender Name:
{{sender.name}}
Sender Title:
{{sender.title}}
Hire Date:
{{hire.date}}

Approver ⓘ [YES]

[Name]
[Email]
[Title]
☑ Signature Required

Permissions ⓘ [⊗ John Welch   ⌄]

Signature   ☐ The offer letter will be signed when the new employee is added.
☑ Set up a default signature for the offer letter.

Default Signature   [Name]   [Position]

Your Signature
Click to pop-up signature box

[Save Draft]   [Preview] [Publish]