



## SOP: Ensuring Staff Receive a Crossware Email Signature

### Purpose:

To ensure a new staff member's email is correctly configured to receive a Crossware email signature.

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### Step 1: Assign Required Microsoft 365 Groups

Using the **Microsoft Admin Centre** (<https://admin.microsoft.com>):

1. Navigate to **Users > Active users**.
2. Search for the staff member and click their name.
3. Under the **Groups** tab, click **Manage groups**.
4. Add the user to the following groups:
  - Crossware DDI Only  
*(Or the relevant Crossware signature group for that user)*
  - AllStaff
  - One of the following **Branch Groups**, based on their location:
    - HAMILTON
    - CHRISTCHURCH
    - PALMERSTON NORTH

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### Step 2: Ensure Required Profile Fields are Populated

Either in **Microsoft Admin Centre** or via **Active Directory** (if syncing from on-prem):

Check that the following fields are filled out:

Field	Required	Example
Display Name	<input checked="" type="checkbox"/> Yes	John Smith
Job Title	<input checked="" type="checkbox"/> Yes	Customer Service Manager
Office Phone	<input checked="" type="checkbox"/> Yes	07 123 4567 (DDI or TBD)

**⚠** Crossware will skip users who are missing any of these fields if the rule depends on them (especially Office Phone/DDI). Even a placeholder like TBD is better than blank.

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### Step 3: Wait for Sync (If using AD Connect)

If the user was added via **on-premises AD**, run a manual sync:

powershell

CopyEdit

Start-ADSyncSyncCycle -PolicyType Delta

Or just wait ~30–60 minutes for automatic sync to complete.

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### Step 4: Test Signature Application

1. Ask the user to send a test email **externally** (not internally).
  2. Check the **recipient's** inbox — not the user's Sent Items.
  3. Look for the signature at the bottom of the email.
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### Troubleshooting Tips

If the signature doesn't appear:

- Double-check group membership (especially the correct Crossware signature group).
- Confirm all required fields are filled.
- Wait longer (sometimes Crossware caching causes delays).