

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.

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	 Yes	John Smith
Job Title	 Yes	Customer Service Manager
Office Phone	 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.

✅ 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.

✅ 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.

🔍 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).