

Email Guides (Employer)

Customize Default Email Template (Employer)

Instructions

From Settings > Email Templates

1. Click existing email template name.
2. Optional: Click in **Name**, **Description**, and **Subject** to enter new text.
3. In **From**, enter from@company.com email address as one that the employees will recognize.
 - Only one email can be entered.
 - We recommend using the Company Administrator's email.
 - For example, enter human resources contact email, e.g., lylee@thecompanysite.com
4. Enter email verbiage as needed.
 - Do not edit the text in denoted with brackets.
 - Other than [COMPANY_DOMAIN_URL], text denoted by brackets can be deleted.
5. To personalize the email with Ease data, click **Auto Text** and choose a new field.
 - Ease maps data from company and employee profiles into fields denoted with brackets.
6. Format text as needed.
7. Click **Actions**.

8. Choose **Preview** to view how the email will display to employees.
9. Optional: Click in the appropriate field and make adjustments as needed.

End of Procedure

Clone Email Template (Employer)

Instructions

From Settings > Email Templates > [template]

1. Click **Actions** and choose **Clone**.
2. Replace [template] - Copy with new unique **Template Name**.
3. Click **Save**.
4. Make any needed changes to the new template.
 - Changes are automatically saved.

End of Procedure

Create Email Template from Default (Employer)

Instructions

From Settings > Email Templates

1. Click **Actions**.
2. Choose **Create From Default**.
3. Enter **Template Name**.
4. Choose **Type**.
5. Optional: Add **Description**.
6. In **From**, enter [from@company.com](#) email address as one employees will recognize.
 - Only one email can be entered.
 - We recommend using Company Administrator's email.
 - For example, enter human resources contact email, e.g., [lylee@thecompanysite.com](#)
7. Enter **Subject**.
8. Enter email verbiage as needed.
 - Do not edit any text denoted with brackets.
 - Other than [COMPANY_DOMAIN_URL], text denoted by brackets can be deleted.
9. To personalize the email with Ease data, click **Auto Text** and choose a new field.
 - Ease maps data from company and employee profiles into fields denoted with brackets.
10. Format text as needed.

11. Click **Actions**.

12. Choose **Preview** to view how the email will display to employees.

13. Optional: Click in an appropriate field and make adjustments as needed.

End of Procedure

Create Email Template from Blank (Employer)

Instructions

From Settings > Email Templates

1. Click **Actions**.
2. Choose **Create From Default**.
3. Enter **Template Name**.
4. Choose **Type**.
5. Optional: Add **Description**.
6. In **From**, enter [from@company.com](#) email address as one employees will recognize.
 - Only one email can be entered.
 - We recommend using Company Administrator's email.
 - For example, enter human resources contact email, e.g., [lylee@thecompanysite.com](#)
7. Enter **Subject**.
8. Enter email verbiage as needed.
 - Do not edit any text denoted with brackets.
 - Other than [COMPANY_DOMAIN_URL], text denoted by brackets can be deleted.
9. To personalize the email with Ease data, click **Auto Text** and choose a new field.
 - Ease maps data from company and employee profiles into fields denoted with brackets.
10. Format text as needed.

11. Click **Actions**.

12. Choose **Preview** to view how the email will display to employees.

13. Optional: Click in an appropriate field and make adjustments as needed.

End of Procedure

Delete Email Template (Employer)

Instructions

From Settings > Email Templates

1. Click existing email template name or **Edit** next to name.
2. Click **Actions**.
3. Choose **Delete Template**.
4. Click **Yes, Delete**.

End of Procedure