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Send Offer Letter

Business Managers can generate offer letters via email to candidates with a personalized attachment, email/send action in feed, and save offer letters on candidate's profile.

1. Navigate to **Recruiting > Candidates**.
2. Select the desired candidate's name.
3. Confirm the candidate's [email address](#). The email address must be accurate for the candidate to receive the Offer Letter email.

4. Select the **Offer Letter** tab on the candidate's profile. Select **Send Offer Letter**.

Published

Action ▾

eeening
0

Phone Interview
0

In Person Interview
0

Rejected
0

Offered
1

Manually Added: 01/29/20

Change Status:

New Application ▾

Select existing or create new tag

▾

Has also applied for:

View All

Feed

Information

Email

Interviews

Offer Letter

Background Check


Customize and send an offer letter to


Send Offer Letter


5. Open the **Select Offer Letter Template to Begin** dropdown menu.
6. Choose the appropriate template.
7. Select **Next: Compose Offer Letter**.


[< Send Offer Letter](#)


0% Complete

 **Select Offer Letter Template**
in progress

 **Compose Offer Letter**
Incomplete

 **Compose Email**
Incomplete

 **Setup Approvals**
Incomplete

 **Preview & Send**
Incomplete

Select Offer Letter Template

Select Offer Letter Template to Begin (required)

Default Offer Letter Template

Preview Offer Letter Template

Custom Placeholders

Enter offer information to prepopulate the Offer Letter

Company Name (required)

Candidate Full Name (required)

Compensation (required)

Compensation

Start Date (required)

Start Date

Job Title (required)

User Name (required)

Exemption Status (required)

Exemption Status

Next: Compose Offer Letter

8. Update **Company Name**.
9. Verify **Job Title, Candidate Full Name and User Name** are correct. Update if needed.
10. Enter **Compensation** and **Supervisor**.

11. Select **Next: Compose Email**.

< Send Offer Letter

20% Complete

✓

Select Offer Letter Template

Complete

👍

Compose Offer Letter

In Progress

✉

Compose Email

Incomplete

📋

Setup Approvals

Incomplete

👁

Preview & Send

Incomplete

Offer Letter Header

This header will append across the top of all offer letter pages and can be used for company logo and address.

Your Company Logo (From Public Jobs Page)

Company Address

{

YOUR

LOGO

HERE

}

☐ Include in Offer Letter Header

Offer Letter

Letter Body (required)

B

I

U

Dear ,

We are pleased to offer you the position of . Your skills and experience will be an ideal fit for .

As we discussed, your starting date will be . The starting salary is and this is a Exempt role.

If you choose to accept this job offer, please sign a copy of this letter and return it to me at your earliest convenience.

When your acknowledgment is received, we will send you additional benefit and documentation items. We look forward to welcoming you to the team.

Please let me know if you have any questions or I can provide any additional information.

Sincerely,

Previous: Select Offer Letter Template

Next: Compose Email

12. Update **Company Address** in upper left corner to your location name.

13. Complete required fields in **BOLD**.

14. Select **Next: Set Up Approvals**.

< Send Offer Letter

40% Complete

✓ Select Offer Letter Template Complete

✓ Compose Offer Letter Complete

✕ Compose Email In Progress

✕ Setup Approvals Incomplete

✕ Preview & Send Incomplete

Compose Email

Candidate's Email Address (required)

amyambe@test.com

From

Work Email

CC

BCC

Subject (required)

Congratulations!

Email Body (required)

B

I

U

Example email 123

Add Attachments

Select file(s) from computer

Limit of 10 files, 4MB per file and 20MB total can be attached to this email

Previous: Compose Offer Letter

Next: Setup Approvals

15. The **Approvals** feature is not a requirement for our process.

16. Select **Next: Preview & Send**.

17. Review the **Preview Email** and **Preview Offer Letter** areas for any needed changes.

- Confirm the **Attachment** is accurate, if any.

[illegible]

18. Select **Send Offer Letter**.

19. Confirm the following changes:


- Confirm **Candidate Status** changes to **Offer Extended**.
- Confirm **Offer Letter Status** changes to **Awaiting Signature**.
- Confirm the **Offer Letter Status** area allows users to **View Offer Letter**, **Edit and Resend** the offer letter, and **Rescind** the offer letter.

[Feed](#) [Information](#) [Email](#) [Interviews](#) [Offer Letter](#) [Background Check](#)

Offer Letter Status Awaiting Candidate Signature

[View Offer Letter](#) [Edit and Resend](#) [Rescind](#)

sent offer letter a few seconds ago (3/5/2020 at 10:22 AM)

 **Test**

Test
Click here to view your offer letter.

[Expand Email](#)

Offer Letter	Status	Expires On
View Offer Letter	Awaiting Candidate Signature	03/15/2020 11:22AM

- The **Edit and Resend** button will invalidate previously sent offers and require users to repeat the process above to edit and resend the letter.
- The **Rescind** button deactivates the link sent to the candidate.

20. Return to view status updates resulting from Recruiter, Candidate, or Approver actions.

- **Expired:** Candidate did not respond within ten days of receiving offer letter. Recruiter has option to **Resend Offer Letter**.
- **Offer Accepted:** Candidate has signed and submitted offer letter.
- **Offer Rescinded:** Recruiter or administrator revoked.

21. Confirm signed letter saves to the candidate's profile.

Important Information:

- If applicable, users can add other attachments to the email, so long as the attachments meet the following requirements:
 - Limit of 10 files
 - Limit of 4MB per file
 - Limit of 20MB total
- Other internal employees may be CC or BCC to the email. The email such users receive, however, will be a copy of the external email.
- By default, offer letter link included in email to candidate expires ten days after sent. Offer can be resent if this occurs.
- Administrators and Recruiters have the option to **Rescind** offer letter after candidate accepts. Candidate does not receive a notification of a rescinded offer letter after initially accepting said letter.