

Edit the Welcome Email

Last Modified on 03/24/2021 10:07 am
CDT

When you create a KidKare account for guardians, they receive an automated welcome message containing a link that allows them to create their account. You can customize this messaging to suit your business.

To do so:

1. From the menu to the left, click **Accounting**.
2. Select **Guardians**.
3. Click **Welcome Letter Template**.
4. Click **Edit**.
5. Update the **Subject**, **From**, and **Message** boxes, as needed.
 - Use the toolbar to format your text. You can create headings, block quotes, bold/italic/underlined text, lists, and so on. You can also insert hyperlinks, images, and embed video. If you would rather edit via HTML, click to switch to the HTML editor.
 - Click **Add Attachment** to add attachments.
 - Variables you can use to fill-in certain information are listed at the bottom of the Editor. For example, **#ContactName#** will display the guardian's name in the final email.

The screenshot displays the 'Welcome Letter Template' editor. At the top, the breadcrumb navigation shows 'Accounting > Guardians > Welcome Letter Template'. The editor has a title bar 'Welcome Letter Template' with a scroll-up arrow. Below the title bar are input fields for 'Recipient' (john@doe.com), 'Subject' (Welcome to KidKare!), 'From' (#ProviderName#), and 'Message'. The 'Message' field contains the following text: 'Dear #ContactName#,', 'Welcome to KidKare! Please click the link below to confirm your email address and access your KidKare account. KidKare is a secure solution which allows you to keep your child's enrollment information up to date and interact with your child care provider.', 'Click Here to Confirm Your Email', 'Please Note: You must confirm your email in order to access your KidKare account.', 'Sincerely,', and '#ProviderName#'. Above the message text is a rich text toolbar with icons for heading (H1-H6), paragraph (P), pre, bold (B), italic (I), underline (U), link, unlink, list, indent, outdent, undo, redo, image, video, and link. To the right of the toolbar, it shows 'Words: 0' and 'Characters: 0'. Below the message text, there is a row of variables: '#ProviderName# #ContactName# #Username# #RecoveryToken# #LinkUrl#'. At the bottom left, there is an 'Attachments' section with an 'Add Attachment' button. At the bottom right, there are 'Cancel' and 'Save' buttons.

6. When finished, click **Save**.