

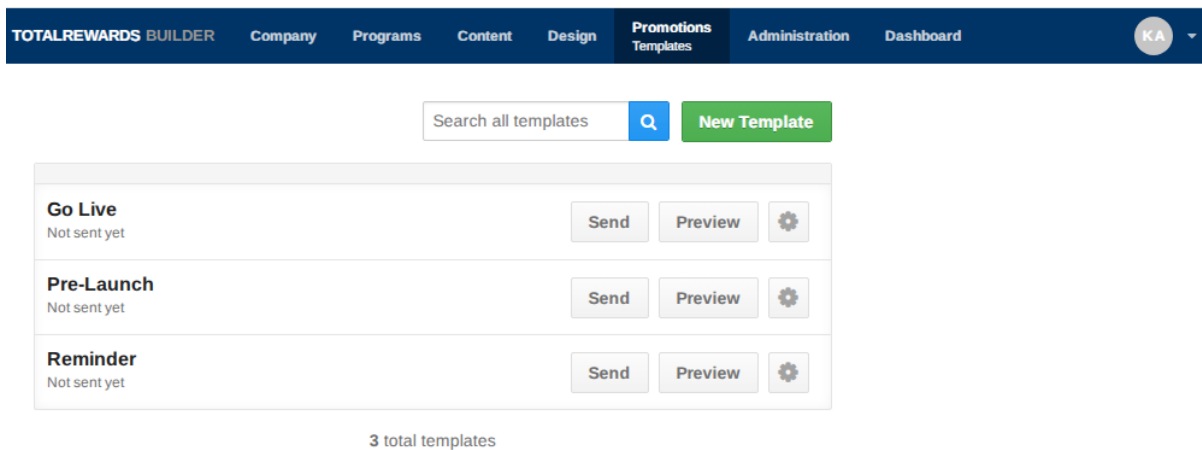
Create or Edit Promotions

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□ Create or Edit Promotions:

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1. Go to **Promotions**.
2. Select **Templates** from the dropdown menu.
3. Click **New Template** to create a new template.



The screenshot shows the 'TOTALREWARDS BUILDER' interface. The top navigation bar includes 'Company', 'Programs', 'Content', 'Design', 'Promotions Templates' (selected), 'Administration', and 'Dashboard'. A user profile icon 'KA' is in the top right. Below the navigation bar, there is a search bar labeled 'Search all templates' with a magnifying glass icon and a green 'New Template' button. The main content area displays a list of three templates: 'Go Live' (Not sent yet), 'Pre-Launch' (Not sent yet), and 'Reminder' (Not sent yet). Each template has 'Send', 'Preview', and a settings gear icon. At the bottom, it says '3 total templates'.

4. Use the first icon (down arrow) to insert **Employee First Name** or **Employee Last Name** at the cursor's position.
5. Type in the **Name**, edit the **From Email** (see **Domain Masking setup** if applicable) and **Subject**, and write your email message in the message box.
6. Check or uncheck **Include login instructions** to enable or disable login instructions.

Name

A name for you to remember this template. This is NOT shown to any employees.

From Email


The email address that this will be sent from.

Subject

The "Subject" of an email message should be a short summary of its contents.

Message

The message body sent to the employee.



**Include login instructions**

Will append instructions to login and view the web statement for each employee. Additionally, a button will be added to click-to-view the web statement.

7. To edit a pre-loaded template, click on its **Title** and update the details.
8. Click **Save** and prepare to preview the email.

Name

A name for you to remember this template. This is NOT shown to any employees.

Pre-Launch

From Email

The email address that this will be sent from.

noreply@totalrewards.io


Subject

The "Subject" of an email message should be a short summary of its contents.

TotalRewards Statement - coming soon!

Message

The message body sent to the employee.



Hi Hi \${first_name},

What is my "Total Rewards Statement"?
Your total rewards statement is a breakdown of your total compensation from 2025, including cash payments, benefits value, and estimated tax savings.

How will I access my Total Rewards Statement?
You will receive an email in the next 2-5 days that will include a link to create your password and login to your personal total rewards statement portal.

What else is on my Total Rewards Statement Portal?
Along with your compensation, you will find additional information about the benefits we offer.

☐**Include login instructions**

Will append instructions to login and view the web statement for each employee. Additionally, a button will be added to click-to-view the web statement.

Save

□ **Note:** Do not include login instructions for **Pre-Launch**. Only include in **Go Live** and **Reminder**. Always send a test email to yourself by clicking the **Preview** button before sending to all to ensure formatting, links, and personalization fields appear correctly.

□ **Quick Steps:** Go to Promotions → New or Edit Template → Insert personalization → Update From Email, Subject & Message → Add/remove login instructions → Save → Preview test email