



# How to Customize Email Notifications.

Learn how to customize email notifications sent to users who submit forms through Kim Webform Links.

# This Video

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Kim's "Webform Submit Create and Update" setting allows you to customize the email notification that users receive after submitting a Kim Webform Link.

To make the emails more relevant, you can add any content control "Tag" data. If you don't configure these changes, the system will send the standard Kim message.

This setting also lets you define who receives notifications upon form submission (e.g. who and how many people are notified of a legal (could be any function) support request).

Create your Application in the normal way.

## HR Update Form

Description HR Update Record

### Update Your HR Record

As we transition to a new HR system, we want to make sure that there is no interruption to your salary being paid to your account. We are also taking the opportunity to make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact details in case of an emergency. Please provide the details below. This information is treated by Kim as sensitive and strictly confidential. It is managed in line with our data security and privacy policies (please see the company handbook). If you have any questions, please contact [hrsystems@kimtechnologies.com](mailto:hrsystems@kimtechnologies.com)

#### 1. Your Name

(i) First Name

(ii) Middle Name or Initial

(iii) Last Name

#### 2. Your Address

(i) House No, / Name

(ii) Street

(iii) City

(iv) Zip / Post Code

Submit

Cancel

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Help Tegan Phillips

Get Started  
Examples  
Applications  
Select an Application from the category and fill out the form.

HR Forms

HR Update Form

Welcome

Assigned 0 Records Draft

Search

Subject Activity Note Attachment Version Action

Clone  
Delete  
Download  
Properties  
Publish Webform Link  
Update  
Version  
Wizard

kim New Appli...  
Settings

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Select "Properties" in the Application's action menu.

Click on the "Settings" tab.

Application properties (HR Update Form)

**Properties**

Unique reference (A unique reference is generated when the user exports the Application.)

Copy Publish Application Link

Copy to clipboard

**Display Name (the document name that the user will see in the sidebar). \***

HR Update Form

**Display Name Tooltip (a tip to help the User select the right document.) \***

Use this to update your personal HR record details

**Description (the purpose of the document, the creation date or the author's name.) \***

To ensure HR has your correct information

**Default Form Wizard Description (this value displays on the wizard form's description when invoked)**

HR Update Record

Use your email account to access Kim Document to send emails. Note that this feature only works with

Update Cancel



Scroll down to "Webform Submit Create and Update."  
Here, you can customize the notifications sent to users  
who submit Webforms from Kim Webform Links.

### Application Settings (HR Update Form)

Properties

☐ None ☒ PDF ☐ DocX ☐ Both

Settings

Webform Submit Create and Update

API Inbound Integration

Configured emails can be sent automatically to the user who submits and/or updates a form. Select 'email template' below to customize the email, including using tags from the document.

API Outbound Integration

Webform Submit Create	Email Template	Status ⓘ	Inactive
Webform Submit Update	Email Template	Status ⓘ	Inactive

Attachments

Manage Subforms and Subrecords

Document Assembly

Logs

Reference Number

Renewals & Alerts

Return URL for Publish Webform and Send Webform Update Link (Optional).

Specify the URL:

Enable to suppress Document Preview after submit

Update

Cancel

Click "Email Template" on the notification type you want to amend (create or update). Note that the standard Kim message will be sent if you do not configure this.

**Application Settings (HR Update Form)**

**Properties** ☐ None ☒ PDF ☐ DocX ☐ Both

**Settings**

Webform Submit Create and Update

Configured emails can be sent automatically to the user who submits and/or updates a form. Select 'email template' below to customize the email, including using tags from the document.

Webform Submit Create	Email Template	Status ⓘ <input type="checkbox"/> Inactive
Webform Submit Update	Email Template	Status ⓘ <input type="checkbox"/> Inactive

Return URL for Publish Webform and Send Webform Update Link (Optional).

Specify the URL:

Enable to suppress Document Preview after submit

**Update** **Cancel**

Enter your name under "Name" (note that this data will not appear in the email notification—it is an audit trail to record who drafted the email).

The screenshot shows the 'Kim Document' web application interface. A modal window titled 'HR Update Form' is open, displaying settings for an email template. A yellow callout box with an arrow points to the 'Name' field, which contains the text 'Tegan Phillips'. The modal includes the following fields and elements:

- Name \***: A text input field containing 'Tegan Phillips'.
- Description**: A text input field containing 'HR Update Form - Webform Submission Email Template'.
- To**: A dropdown menu with the selected option 'User who submits the form.'.
- Subject \***: A text input field.
- E-mail Preview**: A button with an envelope icon.
- Buttons**: 'Save & Close' and 'Close' buttons at the bottom right.

Background text in the modal: 'The two fields below, 'Name' and 'Description', are required for reporting only **and will not appear as part of the email**. Enter a name to identify the Email Template. Enter a description to help identify the recipients, purpose and/or reason for the template.'



Add the email "Description" (note this data will not appear as part of the email notification).

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Help Tegan Phillips

Get Started  
Examples  
Applications  
Select an Application from the list and fill out the form.

HR Forms

HR Update Form

Welcome

Settings

API Inbound  
API Outbound  
Attachments  
Manage Subrecords  
Documents  
Logs  
Reference  
Renewals

The two fields below, 'Name' and 'Description', are required for reporting only **and will not appear as part of the email**. Enter a name to identify the Email Template. Enter a description to help identify the recipients, purpose and/or reason for the template.

Name \*

Tegan Phillips

Description \*

HR Update Form - Webform Submission Email Template

Notification E-mail

To

User who submits the form.

Subject \*

E-mail Preview

Save & Close Close

Update Cancel

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Add the subject of the email notification. You can also insert any content control "Tag" data by selecting it from the "Insert Content Controls" list.

Settings

To: ① User who submits the form.

Subject \*

Insert Content Controls + ☒ Include label when inserting

IR Update Form Submission Received

E-mail Preview

Save & Close | Close

Write the body of the email notification and optionally add any content control "Tags" you want to include.

### Email Template - Webform Submit Create (HR Forms - H...

Status ☐ Inactive

**B** **I** U ~~S~~ " " [List Icons] [Link Icon] [Image Icon] Normal [Undo] [Redo]

Insert Content Controls + ☒ Include label when inserting

Dear [#FullName]  
Thank you for your submission of the [#ApplicationName].  
Please find attached a copy of the record for your records.

Save & Close

Close

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Get Started  
Examples  
Applications  
Select an Application from the category and fill out the form.

HR Forms  
HR Update Form

Welcome

Properties  
Settings  
API Inbou  
API Outbo  
Attachme  
Manage S  
Subrecor  
Document  
Logs  
Reference  
Renewals

Click "E-mail Preview" to preview the email.

Email Body

Dear [#FullName]

Thank you for your submission of the [#ApplicationName].

Please find attached a copy of the record for your records.

Kind Regards,

Your HR Team

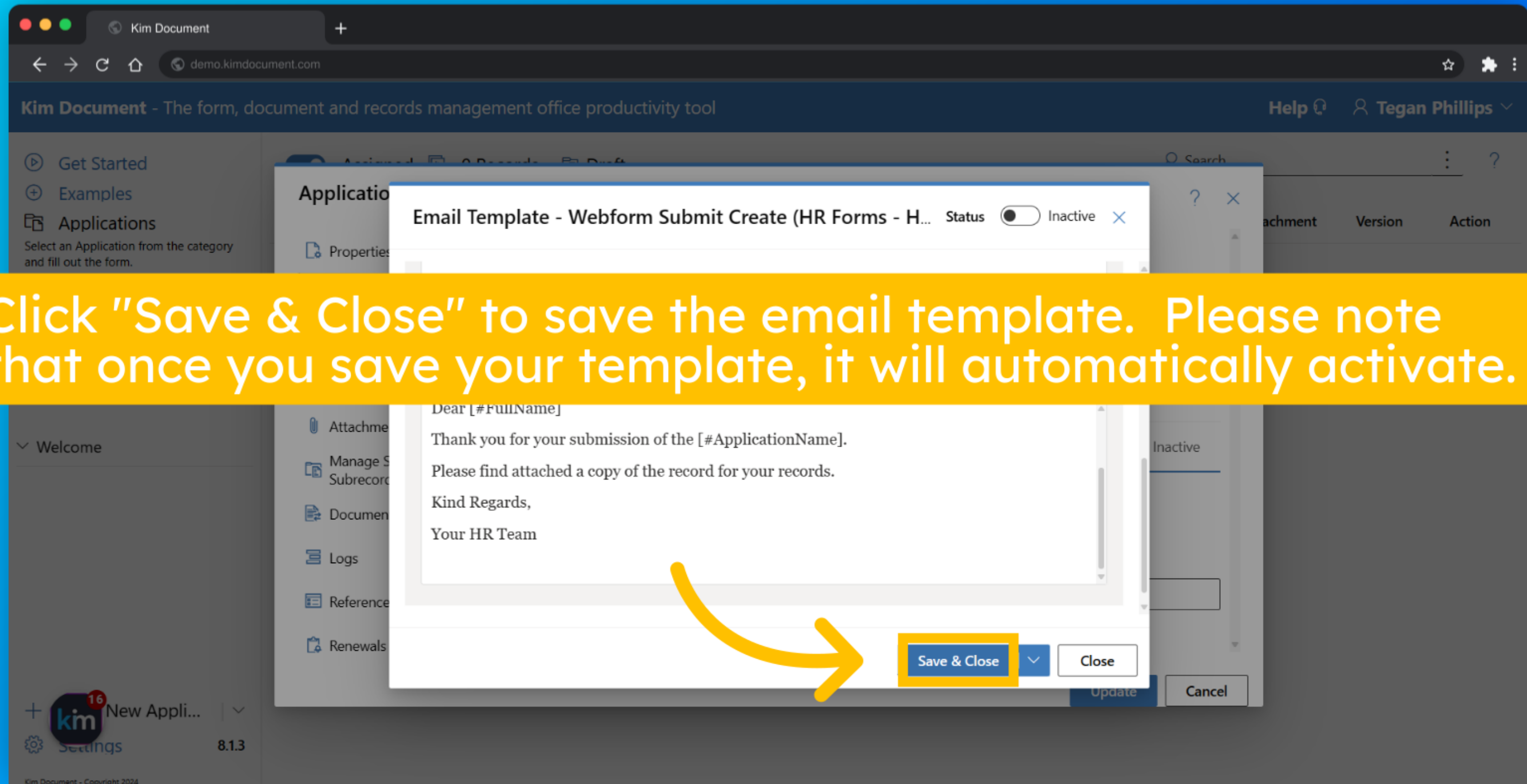
E-mail Preview

Save & Close Close

kim 14 New Appli...  
Settings 8.1.3

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Click "Save & Close" to save the email template. Please note that once you save your template, it will automatically activate.





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Get Started  
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Select an Application from the category and fill out the form.

HR Forms

HR Update Form

Welcome

Manage Subforms and Subrecords  
Document Assembly  
Logs  
Reference Number  
Renewals & Alerts

### Application Settings (HR Update Form)

Properties ☐ None ☒ PDF ☐ DocX ☐ Both

Who submits and/or updates a form. Select 'email' using links from the document.

Email Template	Status
Email Template	<input checked="" type="checkbox"/> Active
Email Template	<input type="checkbox"/> Inactive

Webform Submit Update

Return URL for Publish Webform and Send Webform Update Link (Optional).

Specify the URL:

Enable to suppress Document Preview after submit

Update Cancel

To deactivate or activate the email notification template, toggle here.

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Help Tegan Phillips

Assigned 0 Records Draft

### Application Settings (HR Update Form)

**Properties**

**Settings**

API Inbound Integration

API Outbound Integration

Attachments

Message Subform and

When an audience owner needs these notifications to go to more than just him or herself, the owner must setup an email rule to send to other users.

<input type="checkbox"/> Document Creation	Email Template	Status ⓘ	<input type="checkbox"/> Inactive
<input type="checkbox"/> Document Update	Email Template	Status ⓘ	<input type="checkbox"/> Inactive
<input type="checkbox"/> Application Remove (Co-Owner/Document Creation)			

Update Cancel

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Within the same "Settings" tab, other system-generated notifications can be amended in the same way. To enable the various other notifications, tick this box.

Select the notification types you would like to apply and select "Email Template."

**Properties**

**Settings**

API Inbound Integration

API Outbound Integration

Attachment

Manage Subforms and Subrecords

Document Assembly

Logs

Reference Number

Renewals & Alerts

☒ Enable Notifications. Application audience owner will be notified each time the following selected events occur. For Document Update, the notifications will go to all members of the application audience and any additional users added to the record.

When an audience owner needs these notifications to go to more than just him or herself, the owner must setup an email rule to send to other users.

<input checked="" type="checkbox"/> Document Creation	Email Template	Status ⓘ	<input type="checkbox"/> Inactive
<input type="checkbox"/> Document Update	Email Template	Status ⓘ	<input type="checkbox"/> Inactive
<input checked="" type="checkbox"/> Document Delete	Email Template	Status ⓘ	<input type="checkbox"/> Inactive
<input type="checkbox"/> Document Share	Email Template	Status ⓘ	<input type="checkbox"/> Inactive
<input type="checkbox"/> Application Edit			
<input type="checkbox"/> Application Delete (Owner)			
<input type="checkbox"/> Application Remove (Co-Owner/Document Creation)			

**Update** **Cancel**

Here you can configure your email template in the same way.

## Application

Properties

Settings

API Inbound

API Outbound

Attachments

Manage Subrecords

Document

Logs

Reference

Renewals

### Email Template - Document Creation (HR Forms - HR Update Form)

Status ☒ Active

The two fields below, 'Name' and 'Description', are required for reporting only **and will not appear as part of the email**. Enter a name to identify the Email Template. Enter a description to help identify the recipients, purpose and/or reason for the template.

Name \*

Name

Description \*

Description

Notification E-mail

To \*

☐ Audience

☐ Creator (the audience member that created the record)

☒ Personalized recipients

Select or enter recipient email addresses.

Suggested Audience Contacts

TP Tegan Phillips  
tegan.phillips@kimtechn

Save & Close

Close

Cancel

There is an additional and powerful option to specify who the notifications will be sent to (e.g. you can specify multiple recipients), such as who will receive notifications for a legal support request form (or any other function).



**To \***

☐ Audience

☐ Creator (the audience member that created the record)

☒ Personalized recipients

Select or enter recipient email addresses.

Suggested Audience Contacts

TP Tegan Phillips  
tegan.phillips@kimtechn...

Save & Close | Close



kim

