



WORKFORCE RETENTION PLATFORM

Quick Reference Guide

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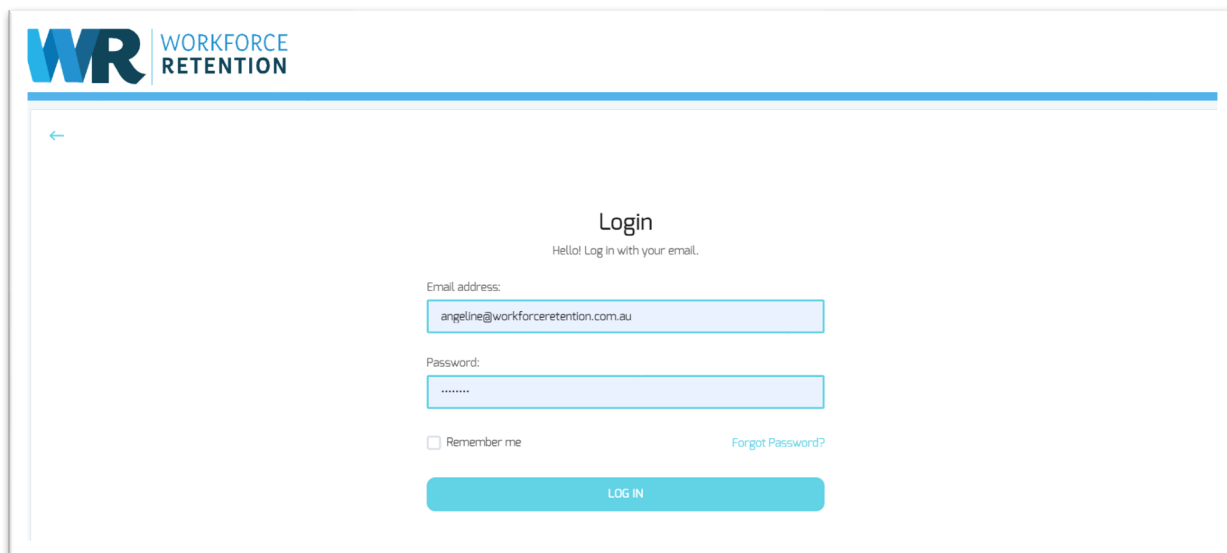
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1. Logging in to the WR Platform

1.1 Click on the link in your invitation email to go to:

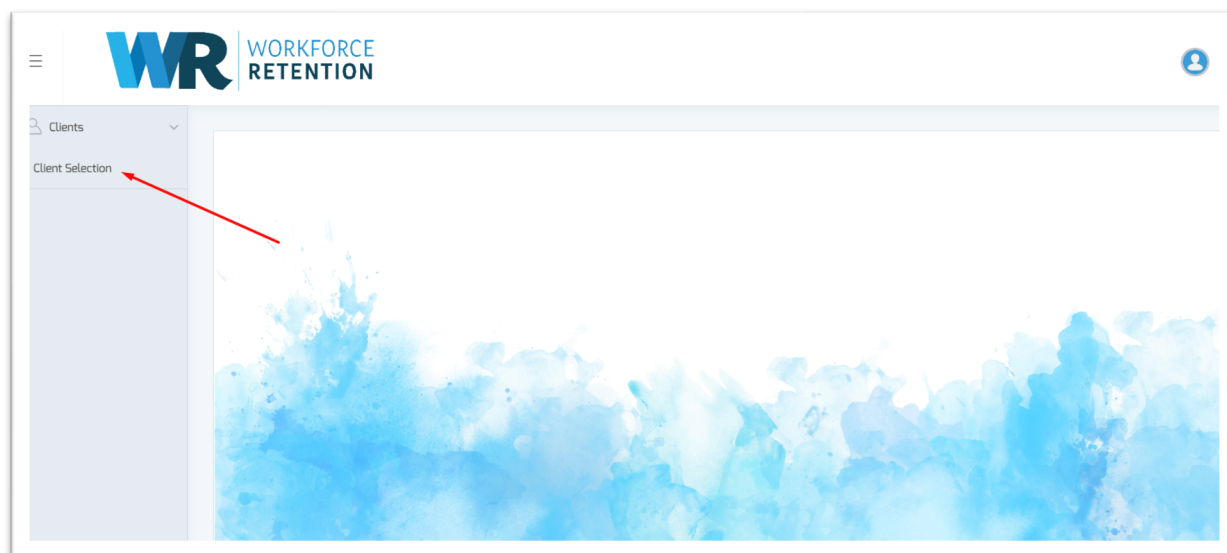
<https://www.workforceretention.com.au/auth/login> .

1.2 Use the login credentials provided in the email to sign in.

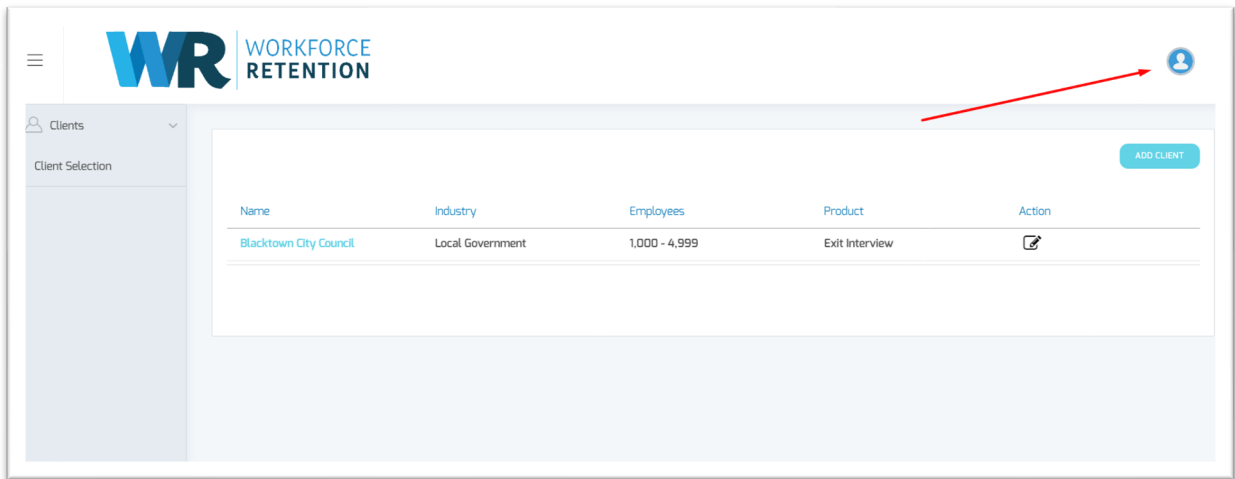


The screenshot shows the login page for the Workforce Retention Platform. At the top left is the logo with 'WR' in large blue letters and 'WORKFORCE RETENTION' in smaller blue letters to its right. Below the logo is a blue horizontal line. The main content area is white and contains the following elements: a back arrow icon in the top left; the title 'Login' in bold black text; a subtitle 'Hello! Log in with your email.'; a label 'Email address:' followed by a text input field containing 'angelina@workforceretention.com.au'; a label 'Password:' followed by a password input field with dots; a checkbox labeled 'Remember me' and a link 'Forgot Password?'; and a large blue button labeled 'LOG IN' at the bottom.

1.3 Once logged in, click on the **Client Selection** link (as shown below)



1.4 You are now logged into the Workforce Retention Platform. To change your password, click the profile circle and follow the instructions.



1.5 Click on your Client name in blue font to open up the menus.

2. Setting Up an Employee Profile

2.1 Navigate to the 'Employees' menu and click 'Add Employee' as shown below:

Client → Abbott

Client Details Organizations **Employees** Surveys Emails Report Data

[Click here to download employee upload template](#)

First Name	Last Name	Position	Manager	Active	Surveys	Completed	Exit	Action
Caroline	Catalano	Executive Assistant to GM	x	☑	☑	x	Oct 22 2024	✎ 🗑
Shweta	Mago	Customer Service Manager	x	☑	☑	☑	Oct 10 2024	✎ 🗑
Edwin	Sharma	Commercial Account Manager	x	☑	☑	☑	Oct 01 2024	✎ 🗑
Michelle	Solomon	Customer Service Representative	x	☑	☑	x	Sep 30 2024	✎ 🗑
Sarah	Wanat	Remote	x	☑	☑	☑	Sen 26 2024	✎ 🗑

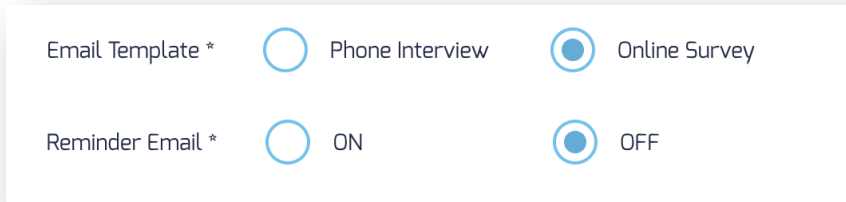
2.2 Enter the employee's profile details.

- Under Email Template, choose the email script to be sent once the profile is saved. See below:

Note: You can update this script of necessary (refer to section 'Updating Email Templates' if email script updates are required).

2.3. Select how the interview will be conducted:

- **Phone Interview** if it will be conducted over the phone.
- **Online Survey** if the interview will be done online.

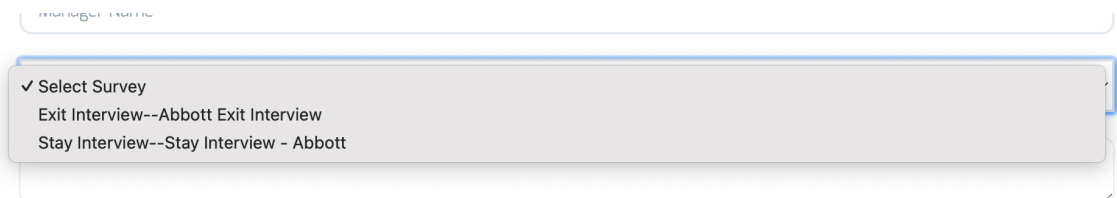


The screenshot shows a form with two rows of radio button options. The first row is for 'Email Template *' with 'Phone Interview' (unselected) and 'Online Survey' (selected). The second row is for 'Reminder Email *' with 'ON' (unselected) and 'OFF' (selected).

2.4 If conducting an Online Survey, decide whether you want it to send a reminder 5 days after the initial email.

2.5. Choose an appropriate survey (as shown).

- **Exit Interview** for an employee leaving the organisation.
- **Stay Interview** for an ongoing employee.



The screenshot shows a dropdown menu with the title 'Select Survey'. The menu is open, showing two options: 'Exit Interview--Abbott Exit Interview' and 'Stay Interview--Stay Interview - Abbott'.

2.6 Review the profile setting and ensure the **Online User** setting is correctly set to trigger the email.

- If you do not want the email to be sent, change the Online User setting to **No**

Employee Active *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Level Manager *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Full Reporting *	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Employee Surveys *	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Online User *	<input checked="" type="radio"/> Yes	<input type="radio"/> No

2.7 Once saved, the employee will receive the selected phone or online interview email.

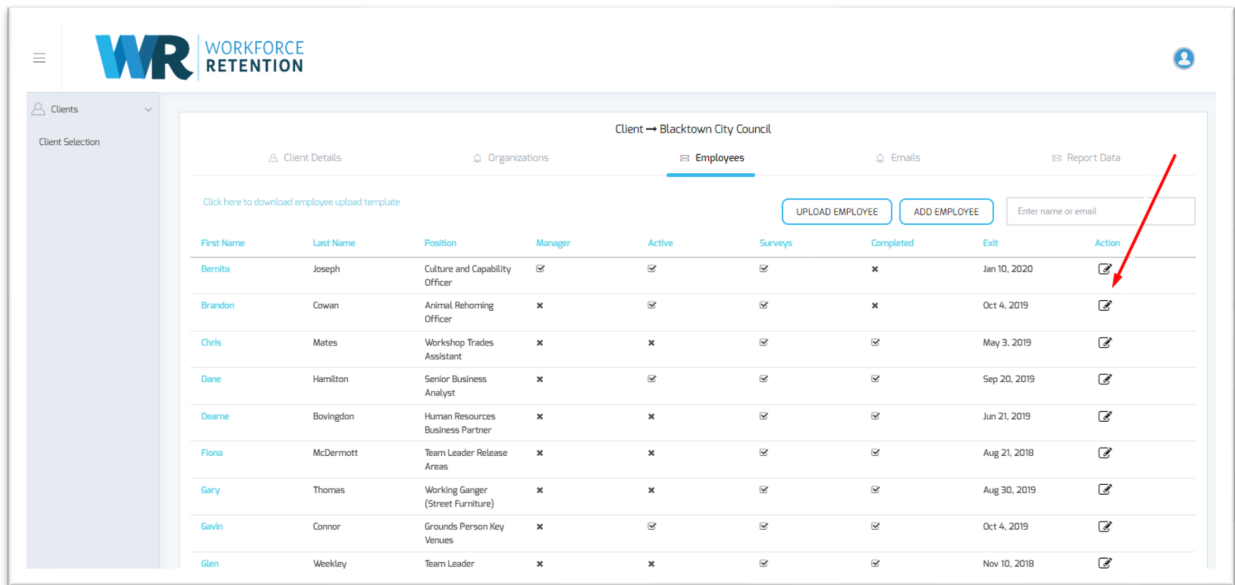
2 Deleting an Employee

To delete an employee, email : admin@workforceretention.com.au with the employees first and last name.

3 Resetting a User Password

If an employee forgets their password, you can reset it:

3.1 Navigate to **Employees** menu.



3.2 Find the employee's profile and click **Resend Email** at the bottom of the profile.

- This will resend the email template with a newly generated password.

Employee Active * Yes No

Level Manager * Yes No

Full Reporting * Yes No

Employee Surveys * Yes No

Online User * Yes No

RESEND EMAIL UPDATE

4 Extracting All Exit or Stay Interview Data

Generating CSV Data Reports

To generate a CSV file containing Exit or Stay Interview data:

- 4.1 Go to the **Report Data** tab.
- 4.2 Select the **Survey Type** from the dropdown menu.
- 4.3 Optionally, set a Start Date and End Date for a specific data range, or leave the dates blank to download all data.
- 4.4 Click **Generate Report** to download the CSV file.

The report will appear in your **Downloads** folder or at the bottom of your screen.

Generate Data Report

✓ Select a Survey
Exit Interview-Abbott Exit Interview
Stay Interview-Stay Interview - Abbott

From Exit Date

To Exit Date

GENERATE REPORT

5 Setting Up a User to View Charts

5.1 To set up a user to login as a manager and view chart reports, email : admin@workforeretention.com.au with :

Company Name

First name

Last Name

Email Address

Position Title

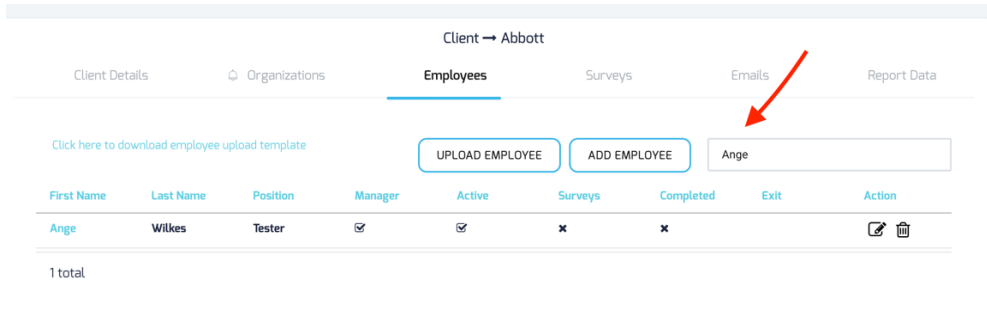
Organisation Level (where they sit in the organisation)

6 Toggling Between Stay & Exit Interview Chart Results

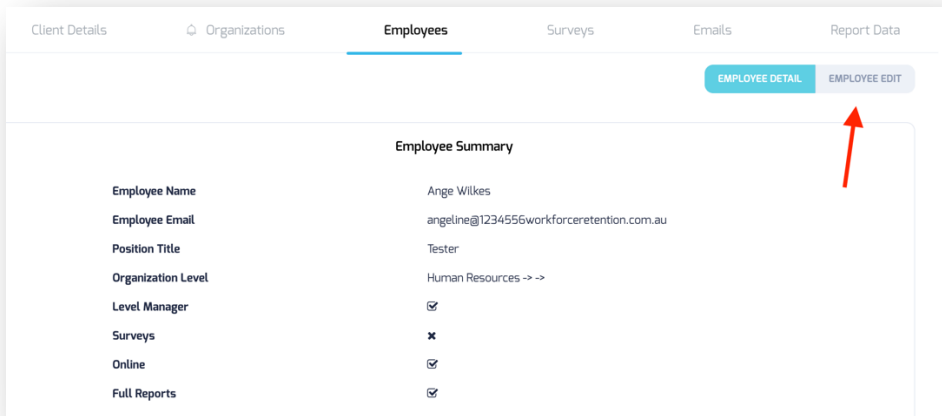
To switch between Exit and Stay Interview charts:

6.1 Log in to the Admin Portal and go to the **Employees** menu.

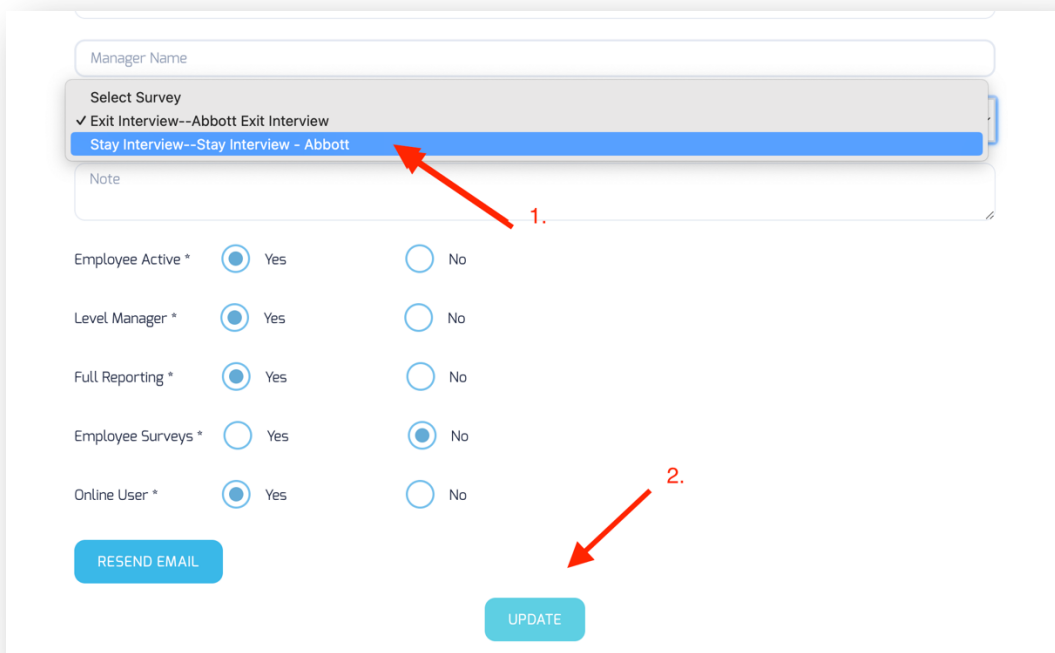
6.2 Find the user whose charts you want to modify and click their first name to open the profile.



6.3 Click on 'Employee Edit' (as shown)



6.4 Scroll to the bottom and select the desired survey type from the dropdown menu.



6.5 Click **Update** to apply the changes.

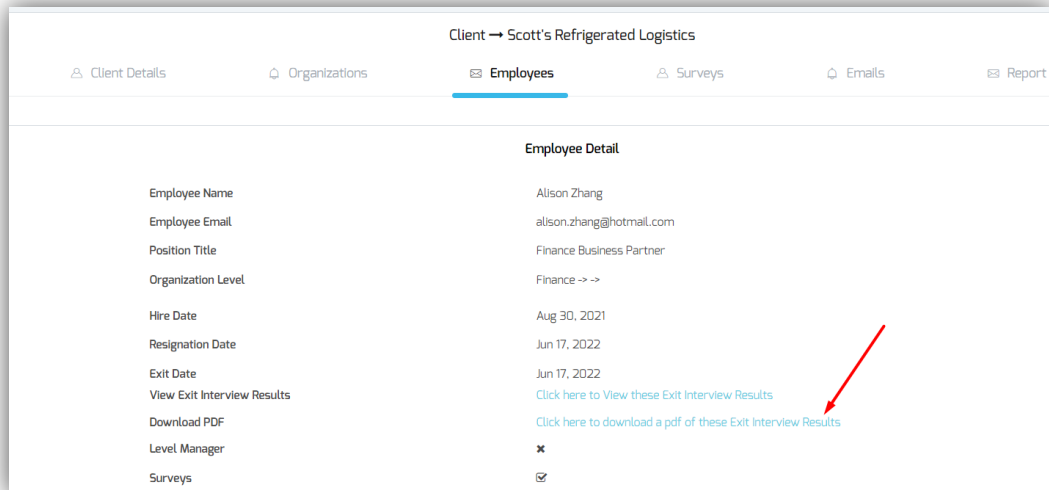
7 Downloading an Exit or Stay Interview

To download an Exit or Stay Interview in PDF format.

7.1 Navigate to **Employees** menu.

7.2 Locate the employee and click their first name to open their profile.

7.3 Click the 'Download PDF' link, and the fill will appear in your Downloads folder.

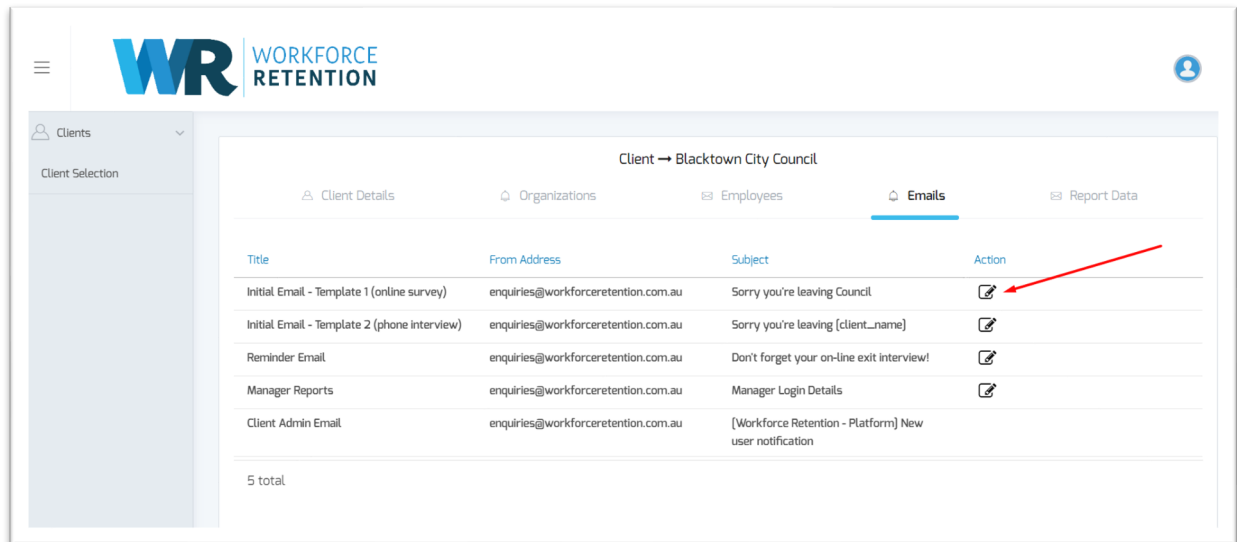


8 Updating Email Templates for Exit or Stay Interviews

You can update the email templates for Exit and Stay Interviews.

8.1 Go to the **Emails Menu** and find the relevant email (e.g., Initial Email – Template for online survey or phone interview).

8.2 Click the **Action** button next to the email template to edit it.



Update the following fields if needed.

From Address: This is the email address that will appear in the FROM and REPLY TO fields of the received email.

Subject Line: This is the text that will appear in the SUBJECT field of the received email.

Body Text: This is the main text as it will appear in the received email. In addition to the above fields, certain variables are available to be placed within the Subject Line and Body Text fields.

Upon sending of the email, these variables are replaced with the relevant data extracted directly from the site's database:

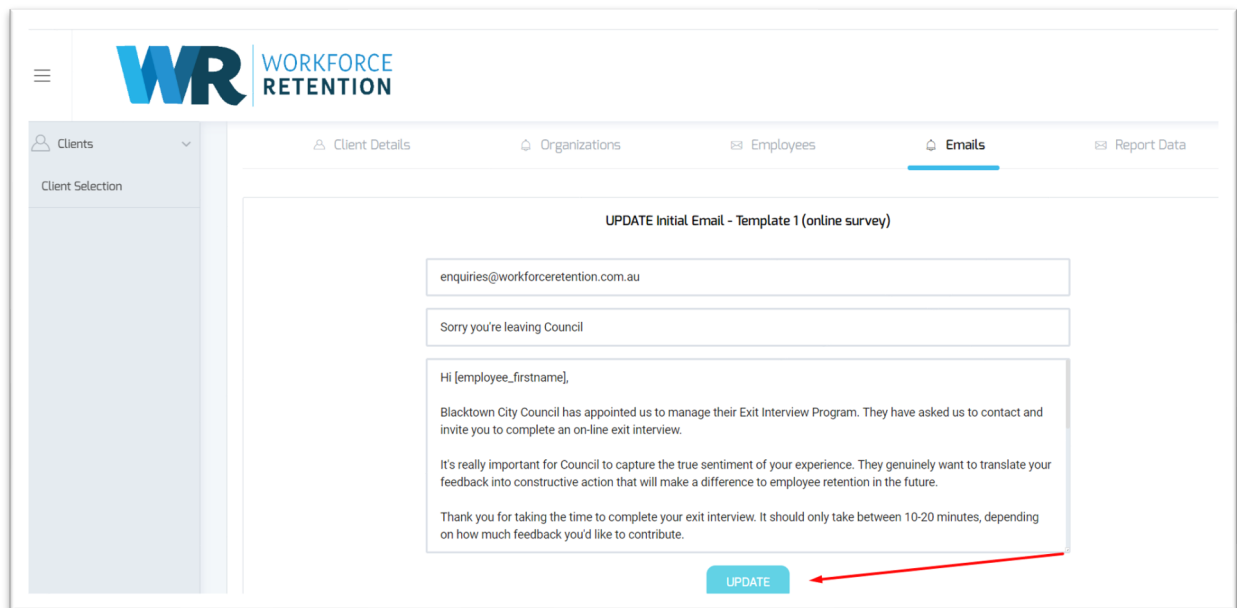
[employee_firstname] - This variable is replaced with the First Name of the Employee to whom the email will be sent

[employee_username] - This variable is replaced with the registered User Name of the Employee to whom the email will be sent

[employee_password] - This is the Password of the Employee to whom the email will be sent.

Note: the Online Survey script should include the [employee_username] and [employee_password] so that the user will be able to log in.

When the relevant form fields have been included and you are satisfied with the script, click the 'Update' button to return to the main 'Emails' screen. (see image below)



Why is it sometimes useful not to send an email?

There may be scenarios where you don't want to send an automated email:

- You plan to notify the employee of the interview internally via corporate email or phone.
- You need to update the employee profile and send the email later. To do this:
 - Set the **Online User** setting to **No** when creating the profile.
 - Later, update the setting to **Yes** and click **Resend Email** when you're ready to send it.





9. Updating email templates for Stay Interviews

9.1 Go to **Page 2** of the **Emails Menu** and find the Stay Interview templates.

9.2 Follow the same steps as outlined for Exit Interview templates to customize the email.

Client → Abbott

Client Details Organizations Employees Surveys **Emails** Report Data

Product	Title	From Address	Subject	Action
Exit Interview	Reminder Email	enquiries@workforceretention.cc	Don't forget your on-line exit interview!	
Exit Interview	Initial Email - Template 2 (phone interview)	enquiries@workforceretention.cc	Sorry you're leaving (client_name)	
Exit Interview	Manager Reports	enquiries@workforceretention.cc	Manager Login Details	
Exit Interview	Initial Email - Template 1 (online survey)	enquiries@workforceretention.cc	Your Online Exit Interview	
	Client Admin Email	enquiries@workforceretention.cc	[Workforce Retention - Platform] New user notification	

8 total

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