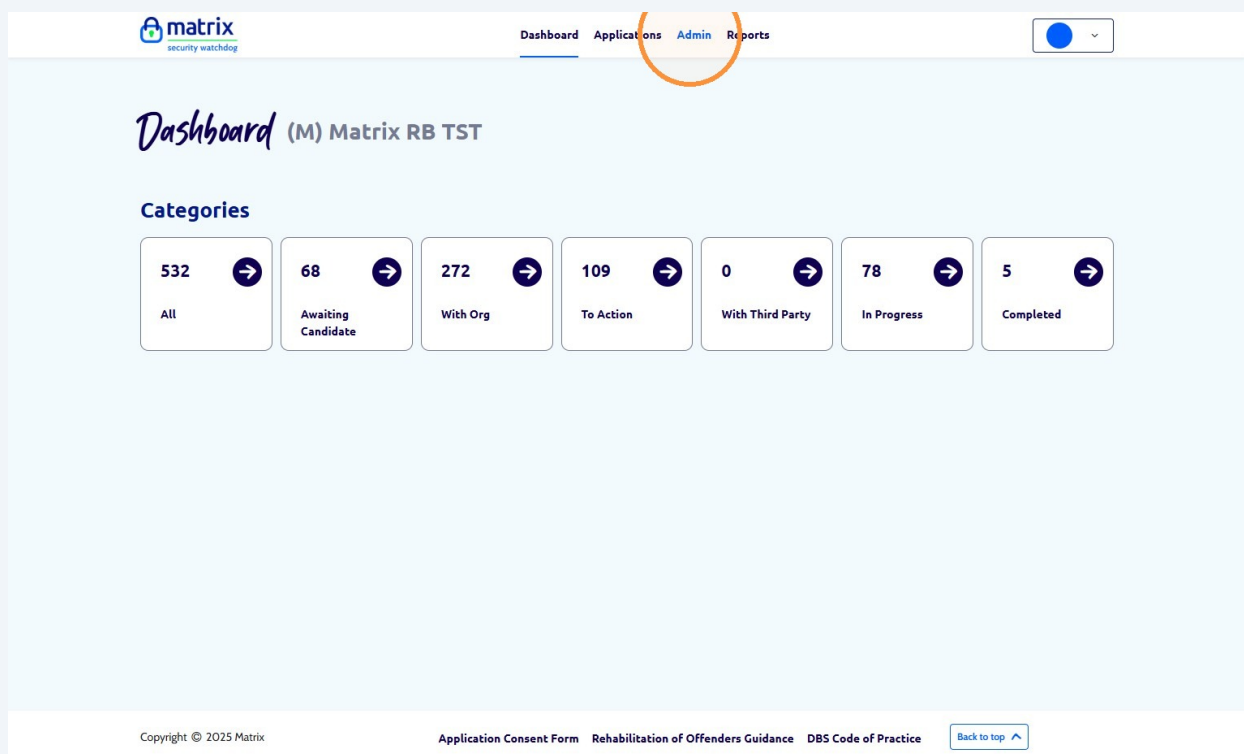


How To Edit Default Comms Templates

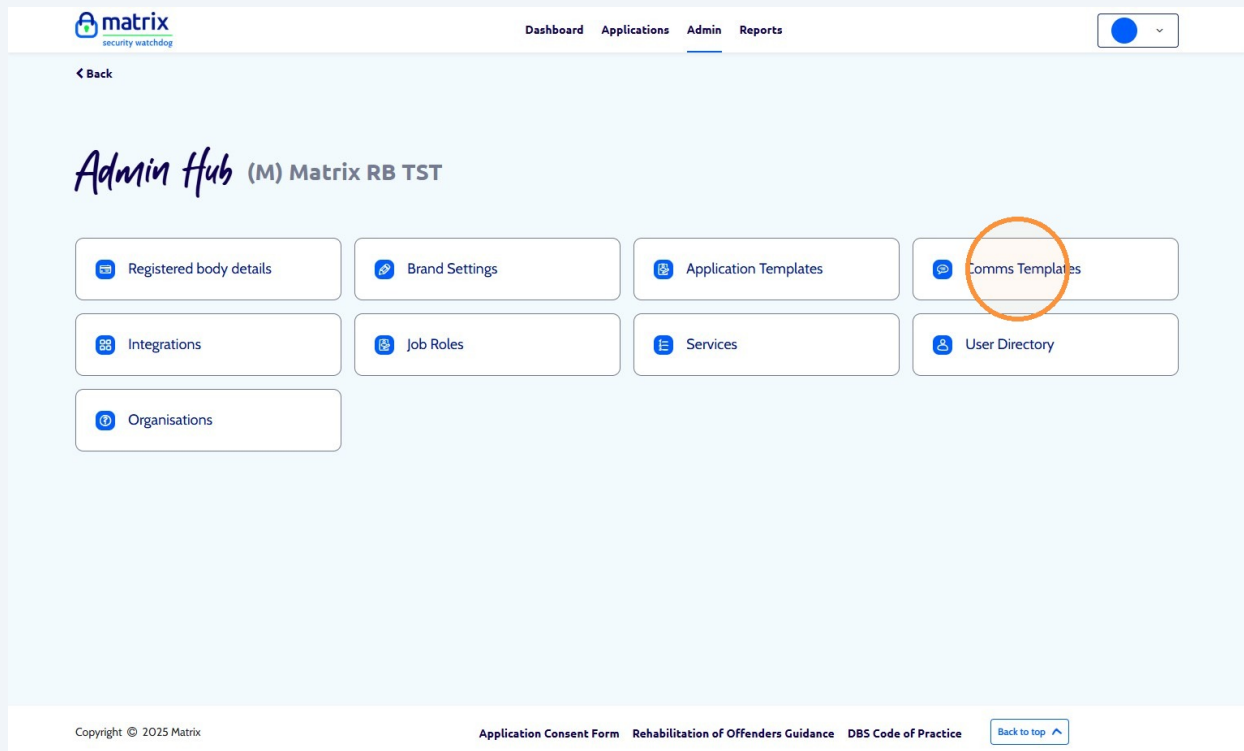


This guide provides a straightforward process for editing default communication templates, ensuring that your messaging aligns with your brand's voice and style. By following the steps outlined, users can easily customize various elements, from subject lines to branding colors, enhancing the overall effectiveness of their communications. Whether you're looking to improve engagement or maintain consistency, this guide is an essential resource for optimizing your templates.

1 Click **Admin** in the toolbar



2 Navigate to **Comms Templates**



The screenshot shows the Matrix Admin Hub interface. The header includes the Matrix logo, navigation tabs (Dashboard, Applications, Admin, Reports), and a user profile dropdown. The main content area is titled 'Admin Hub (M) Matrix RB TST' and contains a grid of buttons for various administrative functions. The 'Comms Templates' button is circled in orange.

matrix security watchdog

Dashboard Applications Admin Reports

< Back

Admin Hub (M) Matrix RB TST

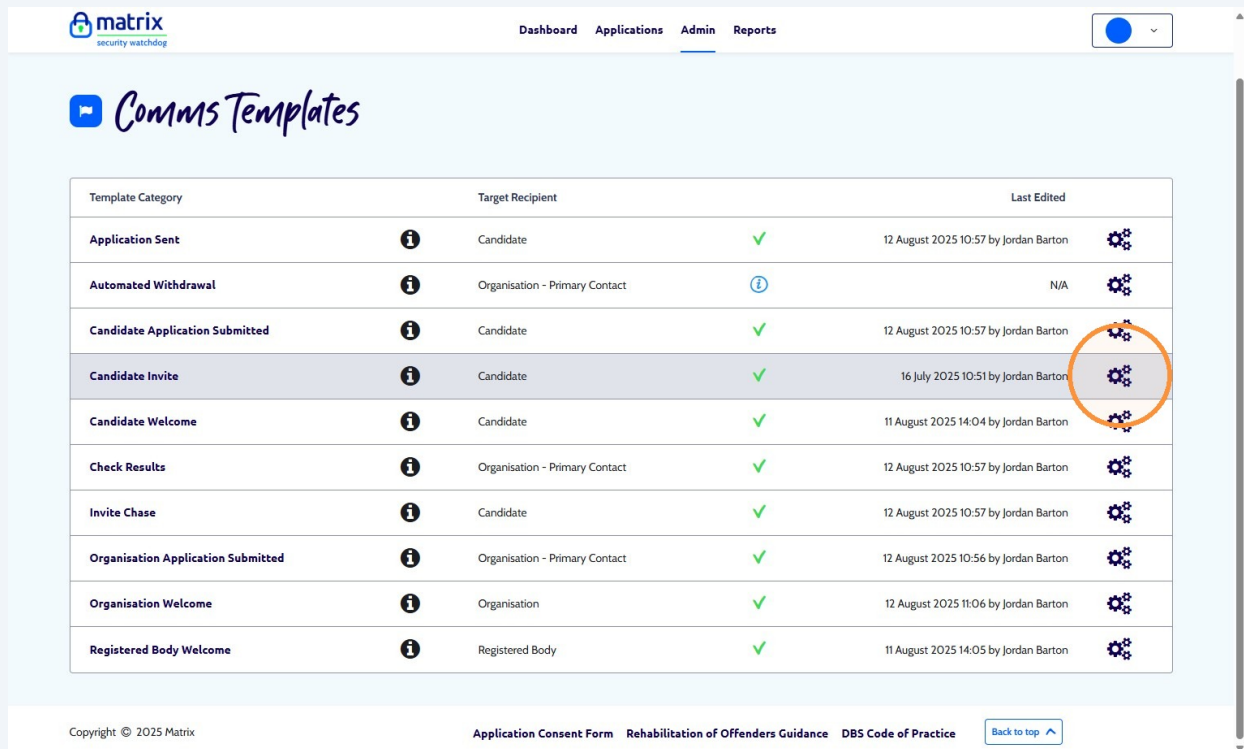
Registered body details Brand Settings Application Templates **Comms Templates**

Integrations Job Roles Services User Directory

Organisations

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3 Click the **Settings** icon of the template you want to amend



The screenshot shows the Matrix Comms Templates page. The header includes the Matrix logo, navigation tabs (Dashboard, Applications, Admin, Reports), and a user profile dropdown. The main content area is titled 'Comms Templates' and contains a table of templates. The 'Candidate Invite' row is highlighted, and its settings icon is circled in orange.

matrix security watchdog

Dashboard Applications Admin Reports

Comms Templates

Template Category		Target Recipient		Last Edited	
Application Sent	i	Candidate	✓	12 August 2025 10:57 by Jordan Barton	⚙️
Automated Withdrawal	i	Organisation - Primary Contact	i	N/A	⚙️
Candidate Application Submitted	i	Candidate	✓	12 August 2025 10:57 by Jordan Barton	⚙️
Candidate Invite	i	Candidate	✓	16 July 2025 10:51 by Jordan Barton	⚙️
Candidate Welcome	i	Candidate	✓	11 August 2025 14:04 by Jordan Barton	⚙️
Check Results	i	Organisation - Primary Contact	✓	12 August 2025 10:57 by Jordan Barton	⚙️
Invite Chase	i	Candidate	✓	12 August 2025 10:57 by Jordan Barton	⚙️
Organisation Application Submitted	i	Organisation - Primary Contact	✓	12 August 2025 10:56 by Jordan Barton	⚙️
Organisation Welcome	i	Organisation	✓	12 August 2025 11:06 by Jordan Barton	⚙️
Registered Body Welcome	i	Registered Body	✓	11 August 2025 14:05 by Jordan Barton	⚙️

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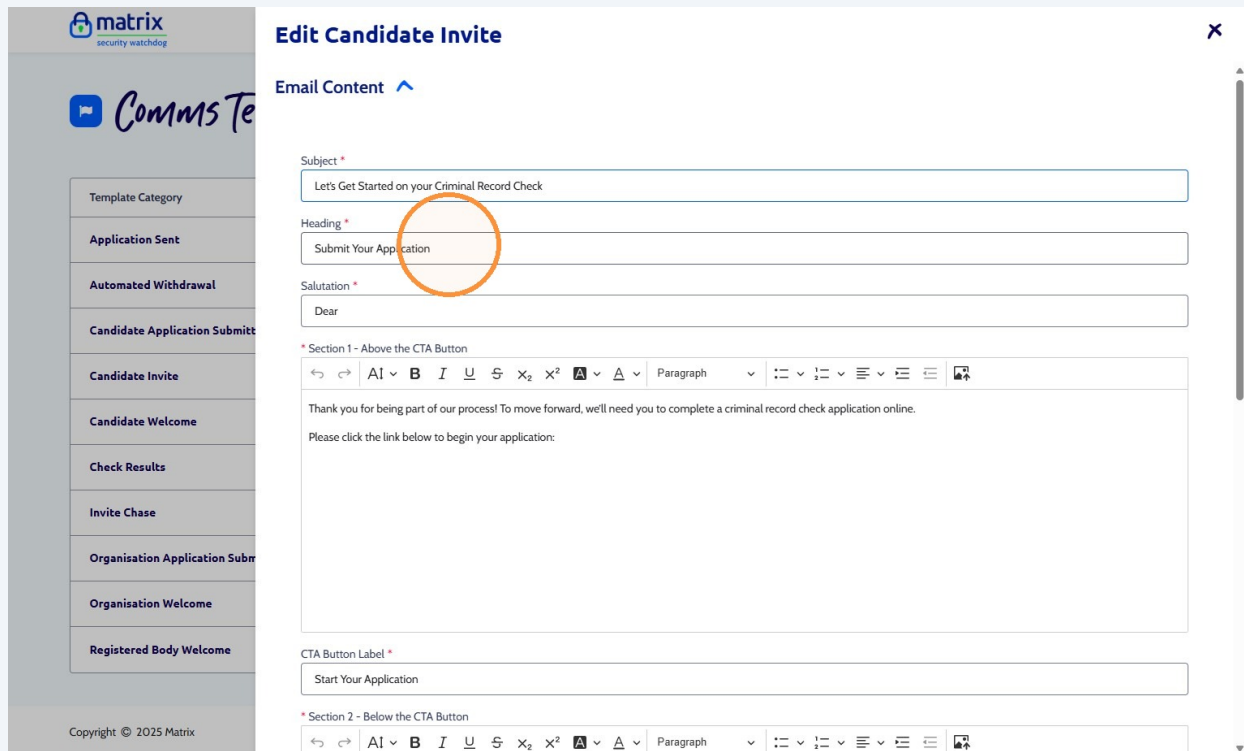
4 The subject line of the email can be changed by amending the 'Subject' field

The screenshot shows the 'Edit Candidate Invite' interface. On the left is a sidebar with a 'matrix security watchdog' logo and a 'Comms Te' logo. Below these are several menu items: 'Template Category', 'Application Sent', 'Automated Withdrawal', 'Candidate Application Submitt', 'Candidate Invite' (which is highlighted), 'Candidate Welcome', 'Check Results', 'Invite Chase', 'Organisation Application Subm', 'Organisation Welcome', and 'Registered Body Welcome'. At the bottom of the sidebar is 'Copyright © 2025 Matrix'.

The main area is titled 'Edit Candidate Invite' and contains an 'Email Content' section. This section has several input fields: 'Subject *' (containing 'Let's Get Started on your Criminal Record Check'), 'Heading *' (containing 'Submit Your Application'), and 'Salutation *' (containing 'Dear'). Below these is a rich text editor for 'Section 1 - Above the CTA Button'. The editor contains the text: 'Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online. Please click the link below to begin your application:'. Below the editor is a 'CTA Button Label *' field containing 'Start Your Application'. At the bottom is another rich text editor for 'Section 2 - Below the CTA Button', which is currently empty. The 'Subject' field is circled in orange.

5

The heading at the top of the email can be changed by amending the 'Heading' field



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Comms Te

Template Category

Application Sent

Automated Withdrawal

Candidate Application Submitt

Candidate Invite

Candidate Welcome

Check Results

Invite Chase

Organisation Application Subm

Organisation Welcome

Registered Body Welcome

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Edit Candidate Invite

Email Content ^

Subject *

Let's Get Started on your Criminal Record Check

Heading *

Submit Your Application

Salutation *

Dear

* Section 1 - Above the CTA Button

Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online.

Please click the link below to begin your application:

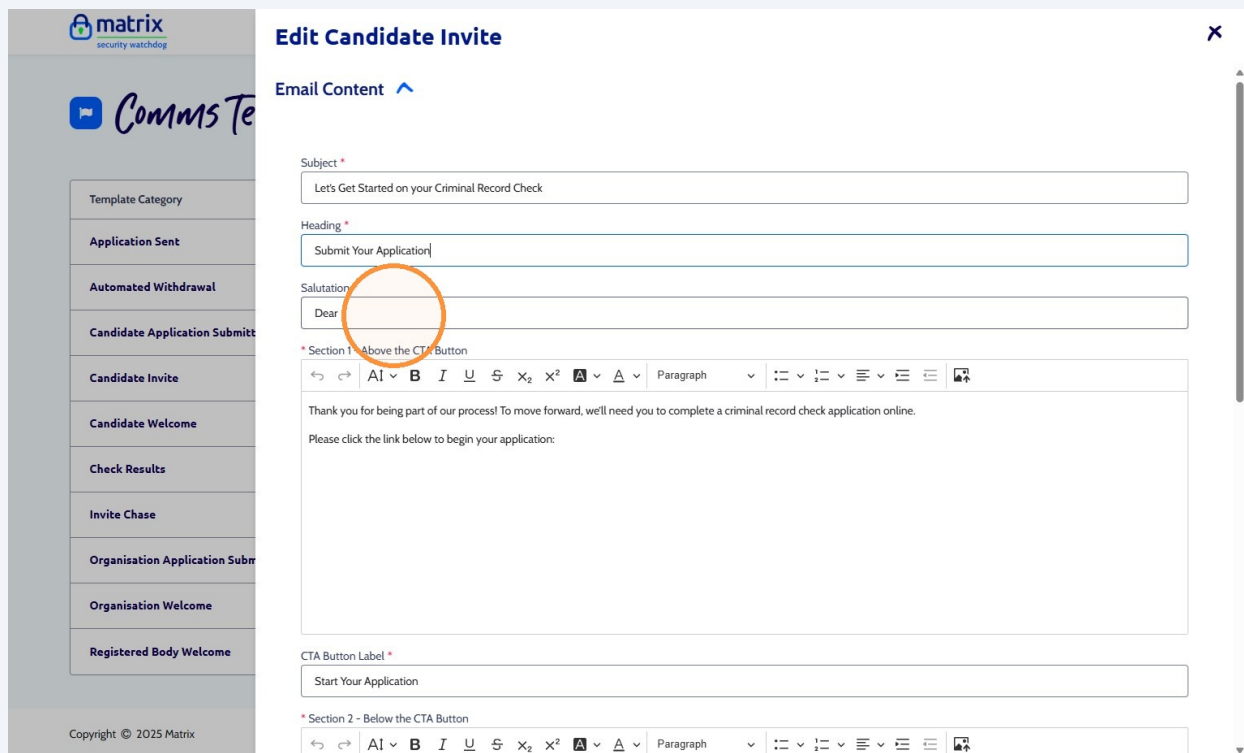
CTA Button Label *

Start Your Application

* Section 2 - Below the CTA Button

6

You can change how the recipient is addressed in the email by amending the 'Salutation' field



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Comms Te

Template Category

Application Sent

Automated Withdrawal

Candidate Application Submitt

Candidate Invite

Candidate Welcome

Check Results

Invite Chase

Organisation Application Subm

Organisation Welcome

Registered Body Welcome

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Edit Candidate Invite

Email Content ^

Subject *

Let's Get Started on your Criminal Record Check

Heading *

Submit Your Application

Salutation *

Dear

* Section 1 - Above the CTA Button

Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online.

Please click the link below to begin your application:

CTA Button Label *

Start Your Application

* Section 2 - Below the CTA Button

7

The content of the email that will appear above the button link can be changed by amending the details in 'Section 1'

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Comms Te

Template Category

Application Sent

Automated Withdrawal

Candidate Application Submit

Candidate Invite

Candidate Welcome

Check Results

Invite Chase

Organisation Application Subm

Organisation Welcome

Registered Body Welcome

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Edit Candidate Invite

Email Content

Subject *

Let's Get Started on your Criminal Record Check

Heading *

Submit Your Application

Salutation *

Dear

* Section 1 - Above the CTA Button

Paragraph

Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online.
Please click the link below to begin your application:

CTA Button Label *

Start Your Application

* Section 2 - Below the CTA Button

Paragraph

8

The wording in the button link can be changed by amending the 'CTA Button Label' field

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Comms Te

Template Category

Application Sent

Automated Withdrawal

Candidate Application Submit

Candidate Invite

Candidate Welcome

Check Results

Invite Chase

Organisation Application Sub

Organisation Welcome

Registered Body Welcome

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Edit Candidate Invite

Dear

* Section 1 - Above the CTA Button

Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online.
Please click the link below to begin your application

CTA Button Label *

Start Your Application

* Section 2 - Below the CTA Button

Before you start, please have the following information ready:

- Your National Insurance number
- Your address history for the past 5 years

What happens next?
Once your application is submitted, you'll receive a confirmation email with the next steps for the criminal record checking process.

Got questions?
If you need assistance or have any questions, feel free to contact us. We're happy to help!

POWERED BY Ckeditor

9

The content of the email that will appear below the button link can be changed by amending the details in 'Section 2'

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Comms Te

Template Category

Application Sent

Automated Withdrawal

Candidate Application Submit

Candidate Invite

Candidate Welcome

Check Results

Invite Chase

Organisation Application Sub

Organisation Welcome

Registered Body Welcome

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Edit Candidate Invite

CTA Button Label *

Start Your Application

* Section 2 - Below the CTA Button

Before you start, please have the following information ready:

- Your National Insurance number
- Your address history for the past 5 years

What happens next?
Once your application is submitted, you'll receive a confirmation email with the next steps for the criminal record checking process.

Got questions?
If you need assistance or have any questions, feel free to contact us. We're happy to help!

Closing Wishes

Kind regards,

Branding

Branding Heading Color (HEX color format)

10

The closing wishes at the bottom of the email can be changed by amending the 'Closing Wishes' field

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security watchdog

Comms Te

Template Category

Application Sent

Automated Withdrawal

Candidate Application Submit

Candidate Invite

Candidate Welcome

Check Results

Invite Chase

Organisation Application Subm

Organisation Welcome

Registered Body Welcome

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Edit Candidate Invite

* Section 2 - Below the CTA Button

Before you start, please have the following information ready:

- Your National Insurance number
- Your address history for the past 5 years

What happens next?
Once your application is submitted, you'll receive a confirmation email with the next steps for the criminal record checking process.

Got questions?
If you need assistance or have any questions, feel free to contact us. We're happy to help!

POWERED BY Creditor

Closing Wishes

Kind regards,

Branding

Branding Heading Color (HEX color format)

#000245

Branding Background Color (HEX color format)

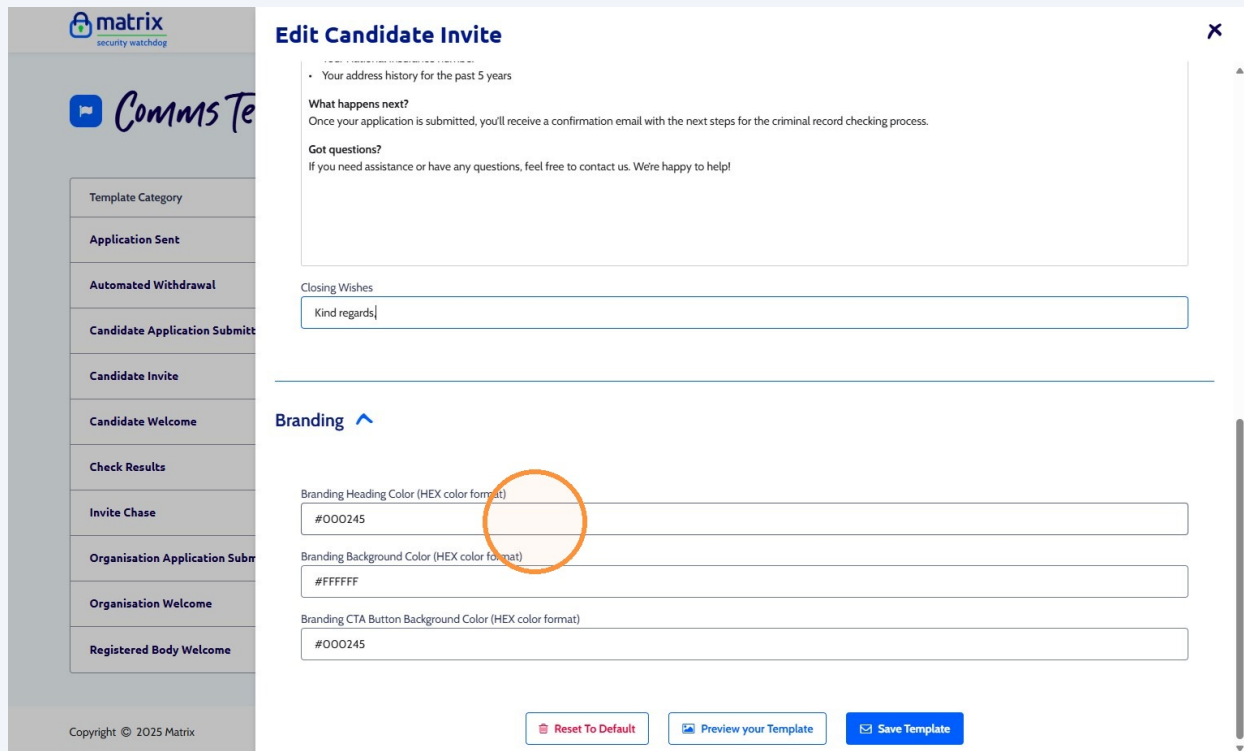
#FFFFFF

Branding CTA Button Background Color (HEX color format)

#000245

11

The branding within the email can be amended in the 'Branding' section. Here you can change the heading and link button colour



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Comms Te

- Template Category
- Application Sent
- Automated Withdrawal
- Candidate Application Submitt
- Candidate Invite
- Candidate Welcome
- Check Results
- Invite Chase
- Organisation Application Subm
- Organisation Welcome
- Registered Body Welcome

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Edit Candidate Invite

- Your address history for the past 5 years

What happens next?
Once your application is submitted, you'll receive a confirmation email with the next steps for the criminal record checking process.

Got questions?
If you need assistance or have any questions, feel free to contact us. We're happy to help!

Closing Wishes
Kind regards

Branding ^

Branding Heading Color (HEX color format)
#000245

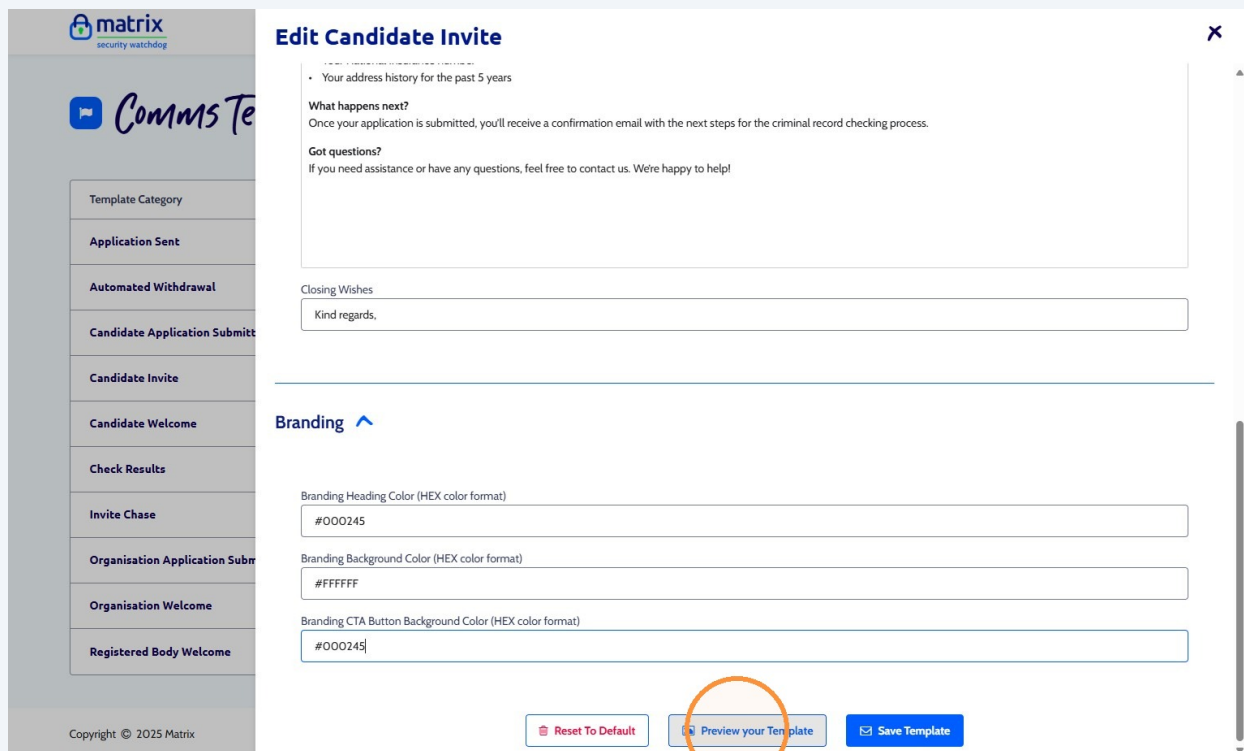
Branding Background Color (HEX color format)
#FFFFFF

Branding CTA Button Background Color (HEX color format)
#000245

[Reset To Default](#) [Preview your Template](#) [Save Template](#)

12

If you wish to preview how the email will render, click the **Preview your Template** button



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Comms Te

- Template Category
- Application Sent
- Automated Withdrawal
- Candidate Application Submitt
- Candidate Invite
- Candidate Welcome
- Check Results
- Invite Chase
- Organisation Application Subm
- Organisation Welcome
- Registered Body Welcome

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Edit Candidate Invite

- Your address history for the past 5 years

What happens next?
Once your application is submitted, you'll receive a confirmation email with the next steps for the criminal record checking process.

Got questions?
If you need assistance or have any questions, feel free to contact us. We're happy to help!

Closing Wishes
Kind regards

Branding ^

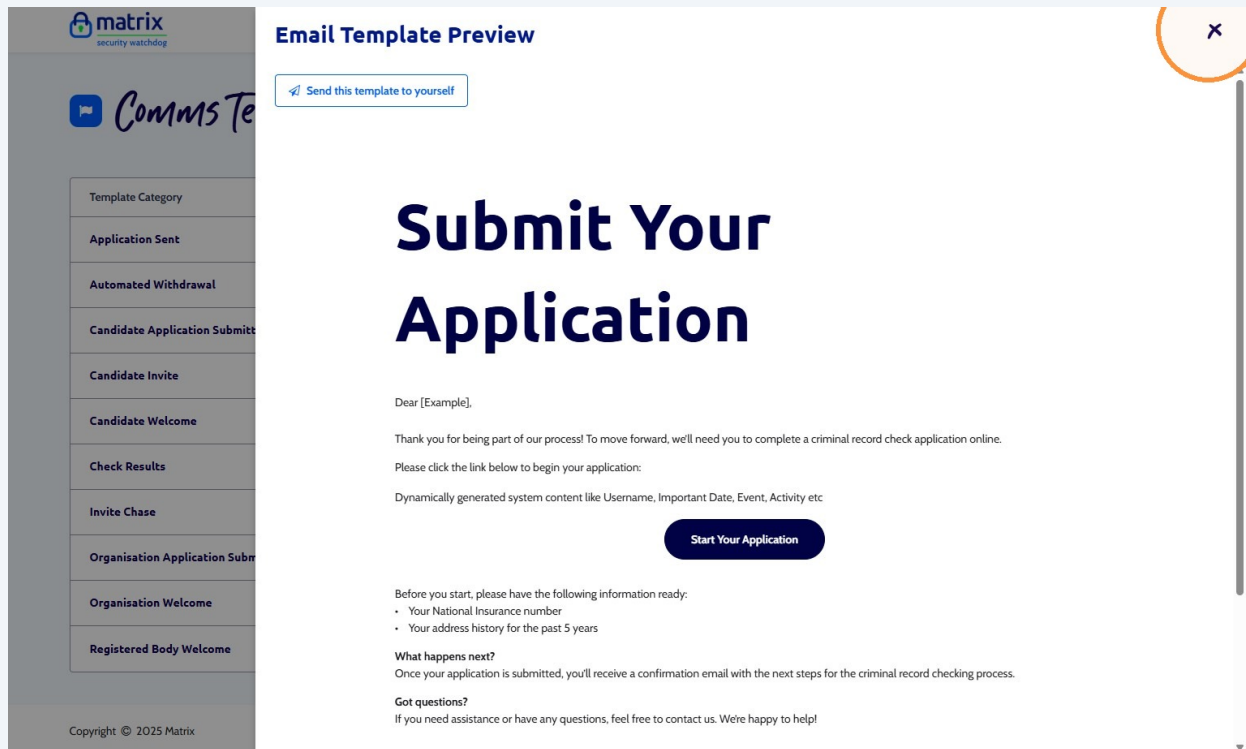
Branding Heading Color (HEX color format)
#000245

Branding Background Color (HEX color format)
#FFFFFF

Branding CTA Button Background Color (HEX color format)
#000245

[Reset To Default](#) [Preview your Template](#) [Save Template](#)

13



Email Template Preview

[Send this template to yourself](#)

Submit Your Application

Dear [Example],

Thank you for being part of our process! To move forward, we'll need you to complete a criminal record check application online.

Please click the link below to begin your application:

Dynamically generated system content like Username, Important Date, Event, Activity etc

[Start Your Application](#)

Before you start, please have the following information ready:

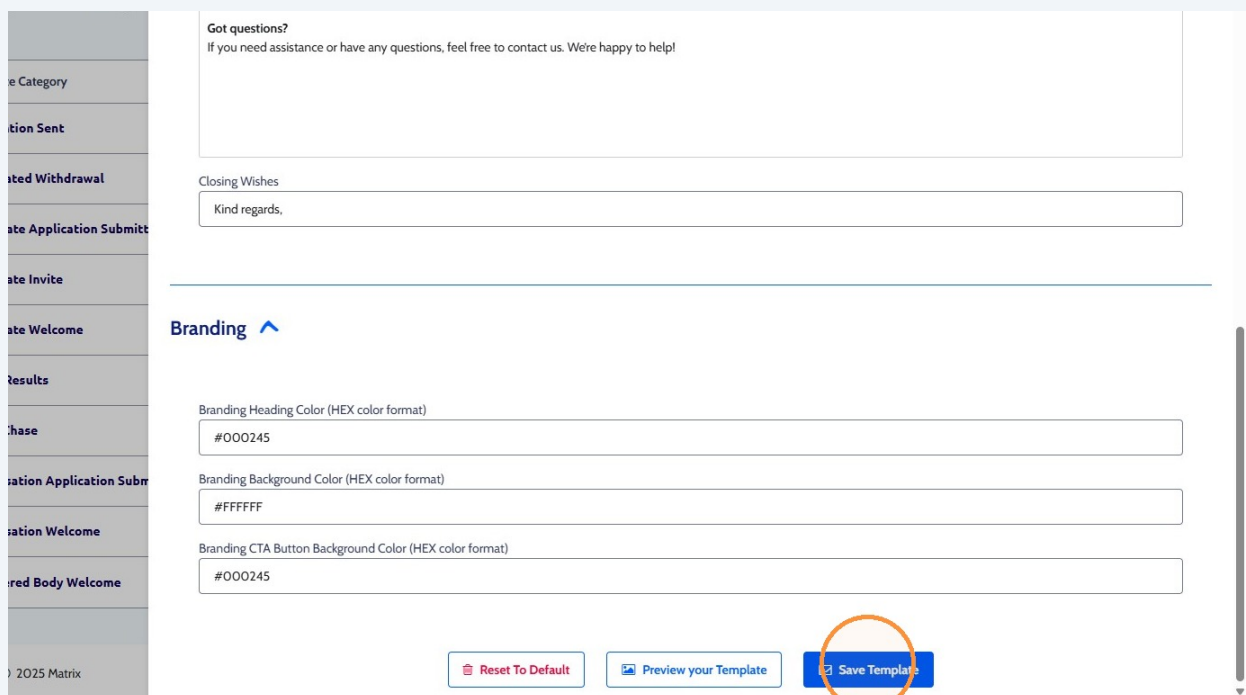
- Your National Insurance number
- Your address history for the past 5 years

What happens next?
Once your application is submitted, you'll receive a confirmation email with the next steps for the criminal record checking process.

Got questions?
If you need assistance or have any questions, feel free to contact us. We're happy to help!

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14 To save your changes, click the **Save Template** button at the bottom of the page



Got questions?
If you need assistance or have any questions, feel free to contact us. We're happy to help!

Closing Wishes
Kind regards,

Branding ^

Branding Heading Color (HEX color format)
#000245

Branding Background Color (HEX color format)
#FFFFFF

Branding CTA Button Background Color (HEX color format)
#000245

[Reset To Default](#) [Preview your Template](#) [Save Template](#)

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