

How HR letters work

HR Letters produces the formal letters an organisation sends its people: offer, appointment, confirmation, appraisal, promotion, bonus, transfer, warning, termination, experience, relieving and NOC letters. It also holds the letter templates, the letterhead, employees' requests for letters, and a library of company policies that people acknowledge.

Several actions here send e-mail to a real person or remove a real document, so this page is a map of the screens and of what each action does. Nothing was issued, sent, revoked or discarded while writing it.

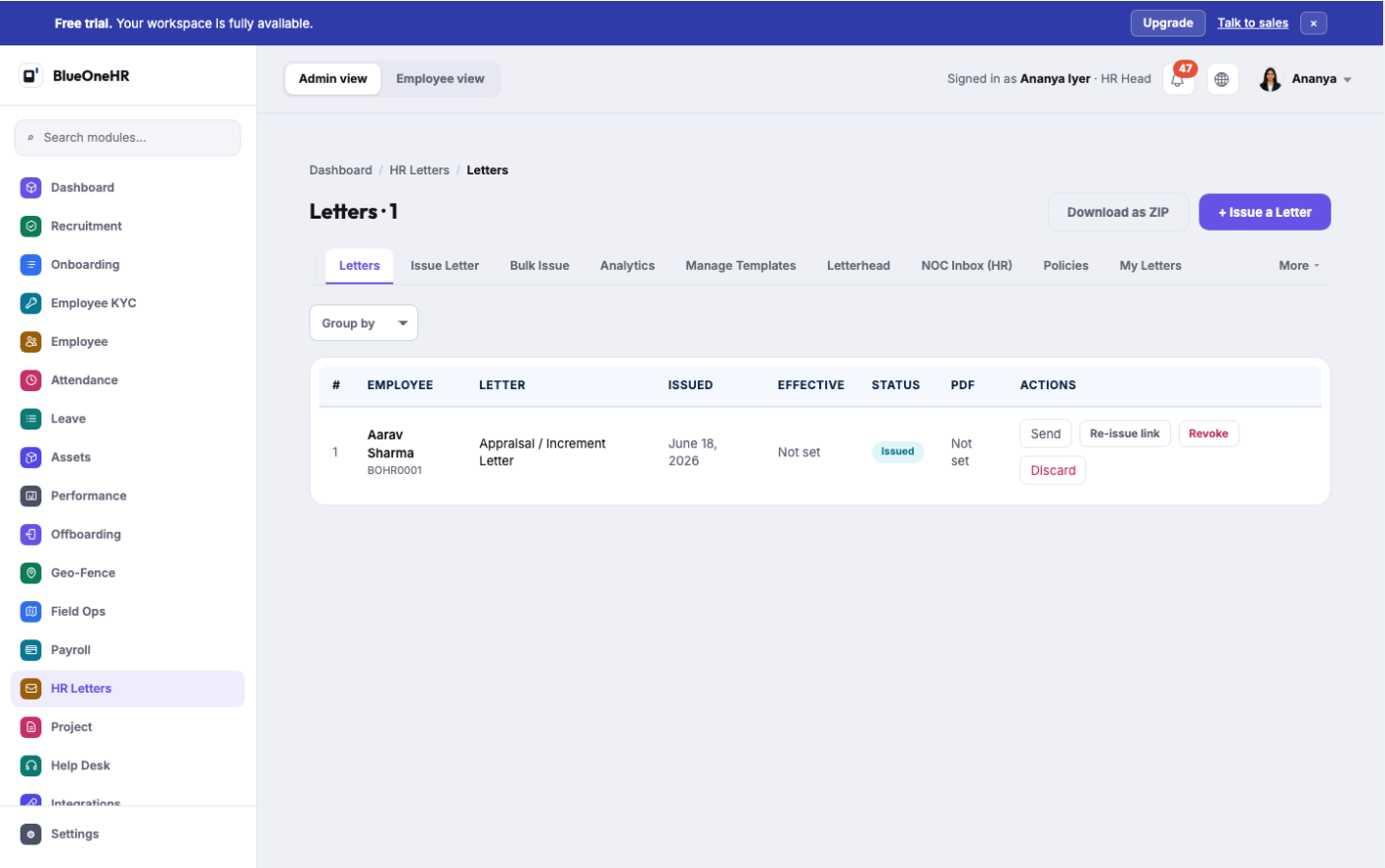
Before you start

- Each screen needs its own permission: viewing letters, issuing them, changing or sending them, deleting them, and managing templates, the letterhead and policies are separate. The tab row shows the full set to someone who holds them; other people see fewer.
- **Warning and termination letters are restricted.** A person can issue them only if they also hold the permission for the related area (adding a disciplinary action for warnings, adding an offboarding employee for terminations). Templates of those types are left out of the picker for everyone else.
- **Issuing does not send.** The Issue screen says: "The letter will not be sent automatically. After issuing, use 'Send' from the Letters list once reviewed."

The screens

The tab row reads **Letters**, **Issue Letter**, **Bulk Issue**, **Analytics**, **Manage Templates**, **Letterhead**, **NOC Inbox (HR)**, **Policies**, **My Letters** and **More**. What sits under **More** was not opened.

Letters



Every letter, newest first, with its number, the employee, the letter type, the issued and effective dates, its status and whether a PDF exists. **+ Issue a Letter** starts a new one, **Download as ZIP** downloads letters as an archive, and **Group by** offers **Status** and **Letter Type**. A letter's status is **Draft, Issued, Signed, Delivered** or **Revoked**.

The four actions on a letter:

Action	What it does
Send	E-mails the letter's PDF to the employee. It refuses if the letter is revoked, has already been delivered, or has no PDF ("has no rendered PDF; cannot send").
Re-issue link	Makes a verification link for the letter, so that someone outside can check it is genuine. The link is shown once. Making a new one breaks the old one : a link already given to a bank or landlord stops working. The confirmation page for a letter that already has a link says so and asks you to confirm.
Revoke	Opens a form with a reason and a choice whether to notify the employee, then marks the letter Revoked .
Discard	Deletes the letter and its PDF. It is not a revoke; nothing is kept.

Issue Letter

Two required choices: **Employee** (active employees) and **Letter template** (active templates, each shown with its type and company). Selecting **Issue Letter** creates the letter, adds it to the Letters list as **Issued** and does not send it. Whether a PDF is produced was not confirmed: the one existing letter had none.

Bulk Issue

Step 1 is **Filter Cohort**: a **Template**, and optional **Department**, **Designation** and **Hired on or after**, and an optional CSV file. The CSV needs a `badge_id` column plus any extras (for example a new CTC, an increment percentage or a bonus amount), which are merged into each person's letter. **Find Cohort** lists the matching people. The next step takes the chosen people, an effective date and two options, **sign** and **send e-mail**; with e-mail on, the letters are sent as they are issued. The result is summarised as issued, skipped and failed. Only step 1 was opened.

Analytics

Counts of **Total letters**, **Issued last 30 days**, **Issued last 7 days** and **Revoked total**, the average days from offboarding to relieving letter ("Not enough data" when there is too little), a month-by-month table for the last 12 months, the **Status Distribution** and **Top Issuers**.

Manage Templates

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Help Desk

Integrations

Settings

Admin viewEmployee view

Signed in as Ananya Iyer · HR Head47

Ananya

Dashboard / HR Letters / Letters / HR Letter Templates

HR Letter Templates · 1

+ New Template

LettersIssue LetterBulk IssueAnalyticsManage TemplatesLetterheadNOC Inbox (HR)PoliciesMy LettersMore

Offer LetterAllClear all

Letter Type Offer

Letter Type	Title	Company	Signatory	Active	Sign?	Updated	Actions
Offer Letter	Default Offer Letter	BlueOneHR	HR Operations Head of Human Resources	Active	Yes	07 Sep 2026 16:03	PreviewEditDelete

One template per letter type ships as a default, and you can add more. Filter by **All types** and by active state. **Preview**, **Edit** and **Delete** are on each row, and **+ New Template** opens a form with **Title**, **Letter type**, **Company** (leave empty for a master template every company can adopt), **Subject**, **Body**, **Signatory name**, **Signatory title**, **Signatory signature** (an image), **Requires signature** and **Is active**.

The body is HTML. A panel beside the form lists the variables you can use, such as the employee's name and badge ID, their work information, the company, dates and the values supplied per letter. It warns that a name that is not on the list renders as nothing at all and does not raise an error, so check the list rather than guess.

Letterhead

The company's logo and the text printed at the top of every letter: **Company name on letters**, **CIN / Registration no.** (optional), **Contact e-mail**, **Website**, **Phone** (optional) and **Address**, with a **Live Preview** of the header. It is saved with **Save Letterhead Settings**.

NOC Inbox (HR) and My Letter Requests

An employee asks for a letter (in practice a NOC) from **My Letter Requests** → **+ New Request**, giving the **Letter type**, **Purpose** (**Visa Application**, **Passport Application / Renewal**, **Bank Loan / Credit Card**, **Rental Agreement**, **Higher Studies**, **Travel** or **Other**), a **Needed by** date and **Details**. HR sees these in the **NOC Inbox**, filtered by status (**Pending HR Approval**, **Approved — Letter Issued**, **Rejected**, **Cancelled by Employee**) and purpose. Approving a request issues the letter from the requested template with the purpose filled in and links it to the request; rejecting records the decision and a note. Both need permission to change letters.

Policies

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Signed in as Ananya Iyer · HR Head

47

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HR Letters

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Help Desk

Integrations

Settings

Dashboard / HR Letters / Policies

Policies · 38

+ New Policy

LettersIssue LetterBulk IssueAnalyticsManage TemplatesLetterheadNOC Inbox (HR)PoliciesMy LettersMore

CATEGORY

All categories

ApplyClear

POLICY	CATEGORY	PUBLISHED VERSION	EFFECTIVE	DRAFTS	STATE	ACTIONS
Background Verification Policy	Statutory & Compliance	None published	—	1	Active	Open Acknowledgements
Child Care and Creche Facility Policy Unreviewed platform template — not legal advice	Statutory & Compliance	v1	Sept. 7, 2026	0	Active	Open Acknowledgements
Maternity Benefit Policy	Statutory & Compliance	None published	—	1	Active	Open Acknowledgements
Parenthood Policy (Paternity, Adoption and Surrogacy)	Statutory & Compliance	None published	—	1	Active	Open Acknowledgements
Personnel Data Privacy Policy	Statutory & Compliance	None published	—	1	Active	Open Acknowledgements

A library of company policies, filterable by category (**HR & People, Code of Conduct, IT & Security, Finance & Expenses, Health & Safety, Statutory & Compliance, Employment Lifecycle, Workplace & Wellbeing, Other**). Each row shows the policy, its category, the **Published version**, when it takes effect, how many **Drafts** it has and its state. **Open** shows the policy and its versions, and **Acknowledgements** shows who has acknowledged it. **+ New Policy** adds one.

A policy that has not been published shows **None published**, with its draft counted under **Drafts**. Some policies are labelled **Unreviewed platform template — not legal advice**, and that is the product's own wording: a starting text to review with your own advisers, not an approved policy.

My Letters and My Policies

An employee's own page. **My Letters** lists the letters issued to them with their status, the PDF and a **My response** column. The page explains the two responses: "I have seen this" is a receipt, and "I agree to these terms" is assent, each recorded once against the exact document shown, with the date and network address. **My Policies** lists the published policies for them to acknowledge in the same way. **My Letters** had nothing for the HR Head on the stage workspace.

What you should see

Each action returns to the Letters list with a message such as "Issued [type] #[number] for [name]. Use 'Send' in the Letters list when ready to dispatch." or "Letter #[number] revoked." . A letter that has been sent shows **Delivered**.

If it does not work

- **Send says the letter has no PDF.** A letter with **Not set** under **PDF** cannot be sent.
- **A variable in a letter comes out blank.** The name is not on the variables list. Correct it in the template.
- **You cannot issue a warning or termination letter.** See the restriction above.

Not confirmed

- **Issuing, sending, bulk-issuing, revoking, discarding or re-issuing a link** was not tried live, and no template, policy or letterhead was saved. The PDFs themselves were not seen.
- **The signing flow** for templates that require a signature, and what **Signed** looks like, were not tried.
- **The policy publish and acknowledgement workflow** was not tried beyond the list.
- **What is under More** in the tab row.

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