

PayBiz – Email

20/02/2018

Contents

Mass Communications	2
Email Setup	3
Email Log.....	5
User Setup	6
Email Invoices and Statements	7
Auto-Email Function	7
Manual Email Function	7
Email Payslips	8
Email via Print Options.....	10
Email via Export.....	11
Sample Emails	13

Mass Communications

The mass communications module includes printing to PDF, Faxing and Emailing from within PayBiz.

- Debtors and Creditors can be set to receive their invoices and statements by email and these are sent automatically when invoice or statement batches are printed.
- Multiple email addresses can be entered so that a copy is automatically sent to say the Accountant or Manager as well as the client.
- Individual Invoices and Statements can be emailed even if the Debtor/Creditor is not setup for automatic emailing.
- All reports, including invoices, system reports, and custom reports etc can be saved to a PDF file or emailed.
- An email signature can be set up for each user of the system. This will be included at the bottom of emails sent from PayBiz.
- Emailed Invoices and Statements use the logo and company details defined in the company details in their header even if your normal printed invoices do not have these details shown.
- A log is kept of all emails sent from within PayBiz so you can quickly check that the correct emails have been sent and to assist with any troubleshooting.

Email Setup

PayBiz main menu > File > Email Settings

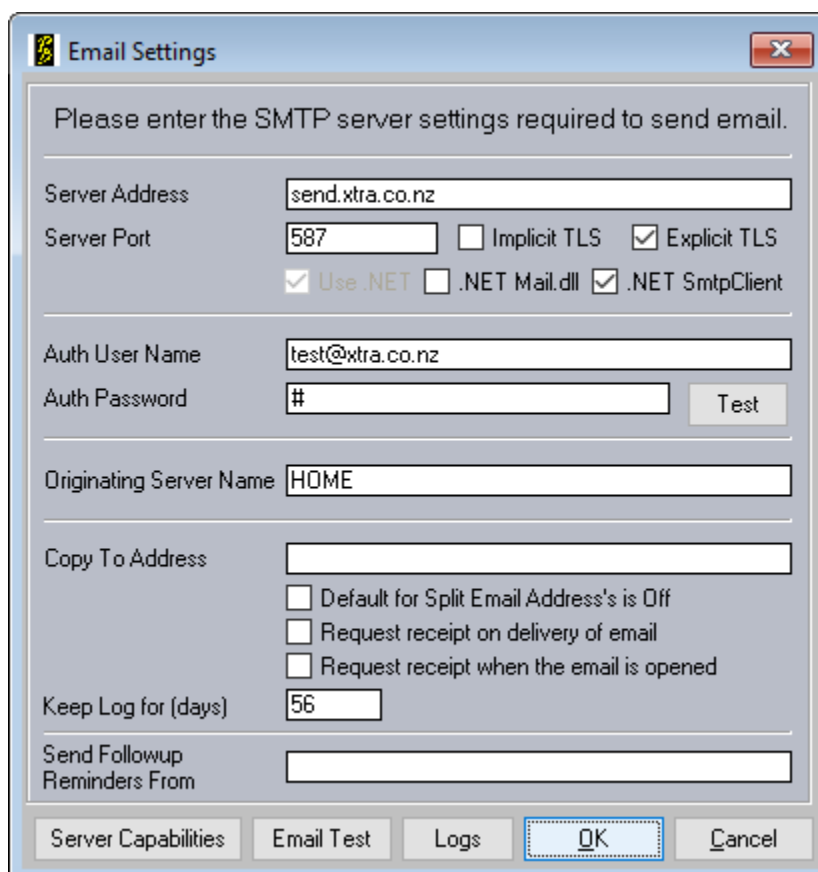
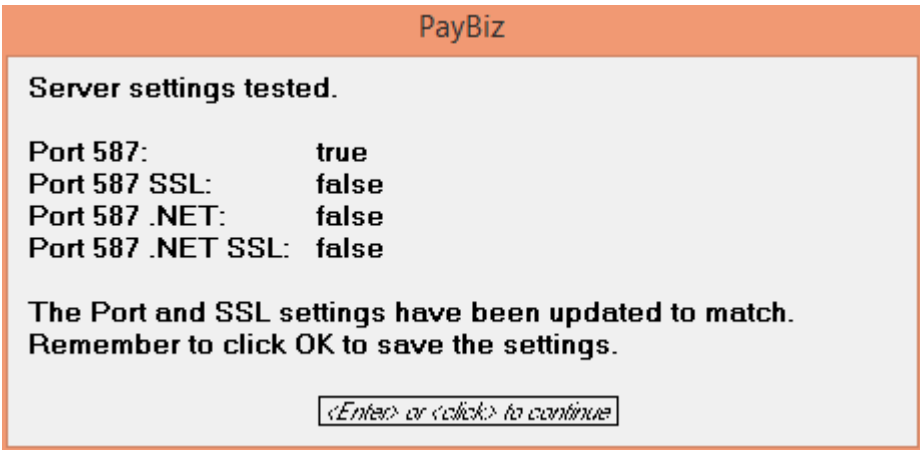


Figure 1: Email Settings

Field	Description
Server Address	Enter the smtp address for your email provider.
Server Port	Enter the port number. Your email provider will be able to give this to you.
Implicit TLS	Where the SMTP client immediately connects using a secure channel.
Explicit TLS	Where the SMTP client immediately connects on an unsecure channel first then secures the connection by issuing STARTTLS command. This mode is sometimes called TLS.
Use .NET	Uses the .NET sockets to send the email.
.NET Mail.dll	Uses the Mail.dll component to send the email.
.NET Smtplib	Uses the built-in Smtplib to send the email.
Auth User Name	The username for the account.
Auth Password	The password for the account. Click the Test button to test the authentication.
Originating Server Name	This name is used by mail servers to track the origin of mail. The name of your server or domain name is appropriate.

Continued...

Field	Description
Copy To Address	Enter a valid email address to send copies of all emails to.
Default for Split...	Not used in PayBiz.
Request receipt...	Tick the appropriate options to request receipts when the email is delivered or opened.
Keep Log for (days)	Enter the number of days to keep the email log. The minimum value is 7 days. Documents (invoices, statements, payslips etc) are emailed in PDF format. Consideration should be given to disk space capacity if choosing to keep the email log for a long period.
Send Followup...	Not used in PayBiz
Server Capabilities	<p>Click to test the Server entered. The Ports and SSL settings available for the server will be tested, the results displayed and the settings updated if required.</p> 
Email Test	Click to send a test email using the current settings.
Logs	Opens the Email Log.
OK	Save settings and Exit.
Cancel	Exit the window without saving any changes.

Email Log

PayBiz main menu > File > Email Log

The first screen lists all the emails initiated from within PayBiz.
Emails that have failed to send are displayed in **Red**.

Click on any line to view the details of a specific email.

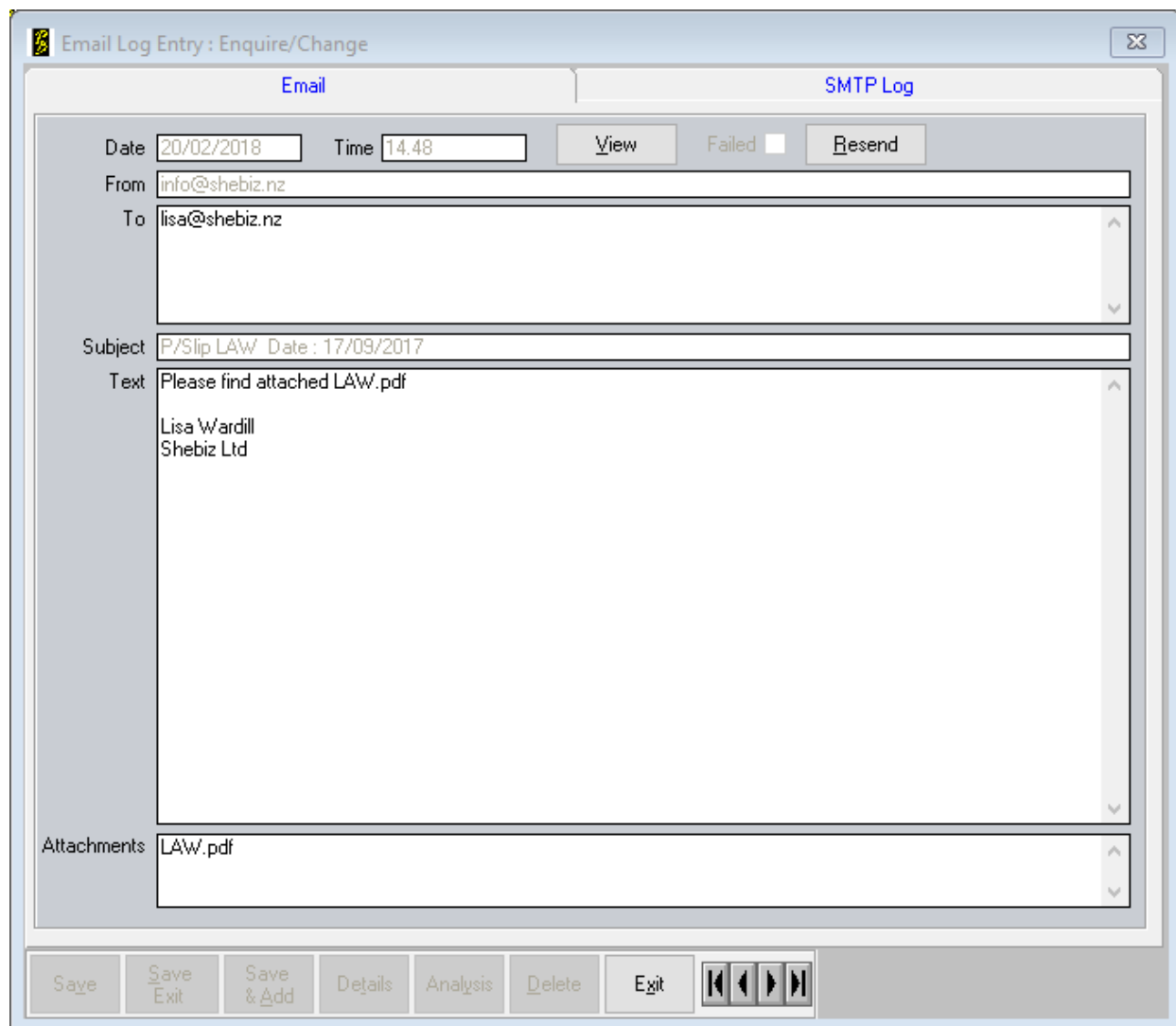
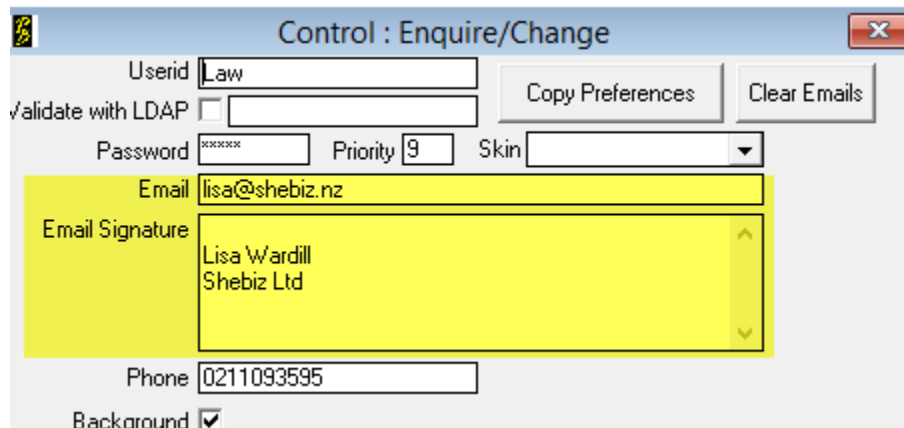


Figure 2: Email Log

- Shows the details of sent messages.
- Click the **View** button to view the actual message in your default email program.
- Click the **Resend** button to resend the email.
- Click on the SMTP Log to see a full log of the transmission. This can be useful for troubleshooting if the email has Failed.

User Setup

PayBiz main menu > File > User File



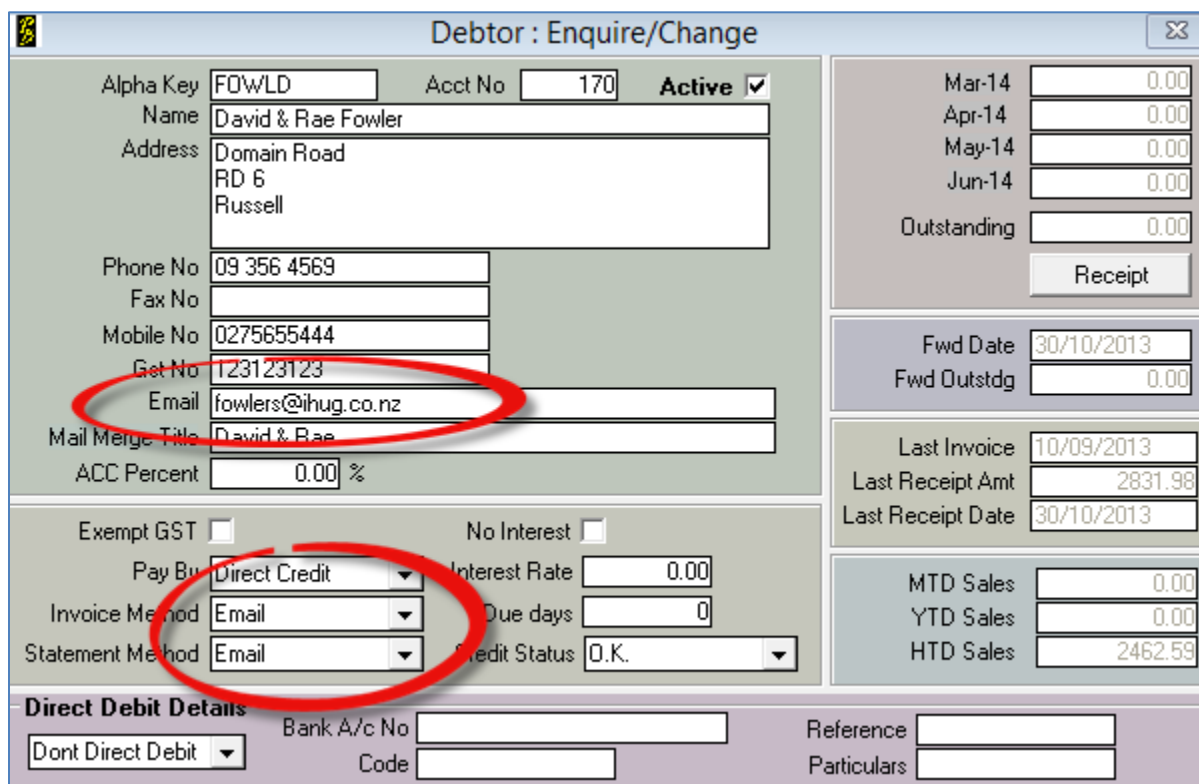
The screenshot shows a window titled "Control : Enquire/Change" with a close button (X) in the top right corner. The window contains several input fields and buttons. The "Userid" field is set to "Law". There is a "validate with LDAP" checkbox which is unchecked. The "Password" field is masked with "xxxxxx". The "Priority" field is set to "9". The "Skin" field is a dropdown menu. The "Email" field is set to "lisa@shebiz.nz". The "Email Signature" field is a text area containing "Lisa Wardill" and "Shebiz Ltd". The "Phone" field is set to "0211093595". The "Background" checkbox is checked. There are two buttons: "Copy Preferences" and "Clear Emails".

Figure 3: Email settings on User file

- Enter a valid email address for each user of the system. This will be the default From address used for emails sent by this user.
- Enter a signature. If entered, this will print at the bottom of the email.
Note:
 - This example has a blank line first (hold Shift key and press Enter). This is to separate the signature from the rest of the email text.

Email Invoices and Statements

Debtors and Creditors can be set up to receive their invoices and statements via email.



Debtor : Enquire/Change

Alpha Key	FDWLD	Acct No	170	Active	<input checked="" type="checkbox"/>
Name	David & Rae Fowler				
Address	Domain Road RD 6 Russell				
Phone No	09 356 4569				
Fax No					
Mobile No	0275655444				
Get No	123123123				
Email	fowlers@ihug.co.nz				
Mail Merge Title	David & Rae				
ACC Percent	0.00 %				

Mar-14	0.00
Apr-14	0.00
May-14	0.00
Jun-14	0.00
Outstanding	0.00
Receipt	

Fwd Date	30/10/2013
Fwd Outstdg	0.00

Last Invoice	10/09/2013
Last Receipt Amt	2831.98
Last Receipt Date	30/10/2013

MTD Sales	0.00
YTD Sales	0.00
HTD Sales	2462.59

Exempt GST	<input type="checkbox"/>	No Interest	<input type="checkbox"/>
Pay By	Direct Credit	Interest Rate	0.00
Invoice Method	Email	Due days	0
Statement Method	Email	Credit Status	O.K.

Direct Debit Details	
Dont Direct Debit	<input type="checkbox"/>
Bank A/c No	
Code	
Reference	
Particulars	

Figure 4: Email settings on Debtor screen

Auto-Email Function

- Invoices printed via **Reports > Batch Print Invoices**
- Statements printed via **Debtors > Debtor Statements**
- Multiple email addresses can be entered in the **Email** field, separated with a comma. Copies of the invoices/statements will be sent to all the valid email addresses entered.
- Debtors set to Email will be automatically emailed when **Print** is clicked if the **Preview** is NOT ticked. The Debtor not set to Email will print normally.

Note:

- *This will only work if Preview is NOT ticked.*

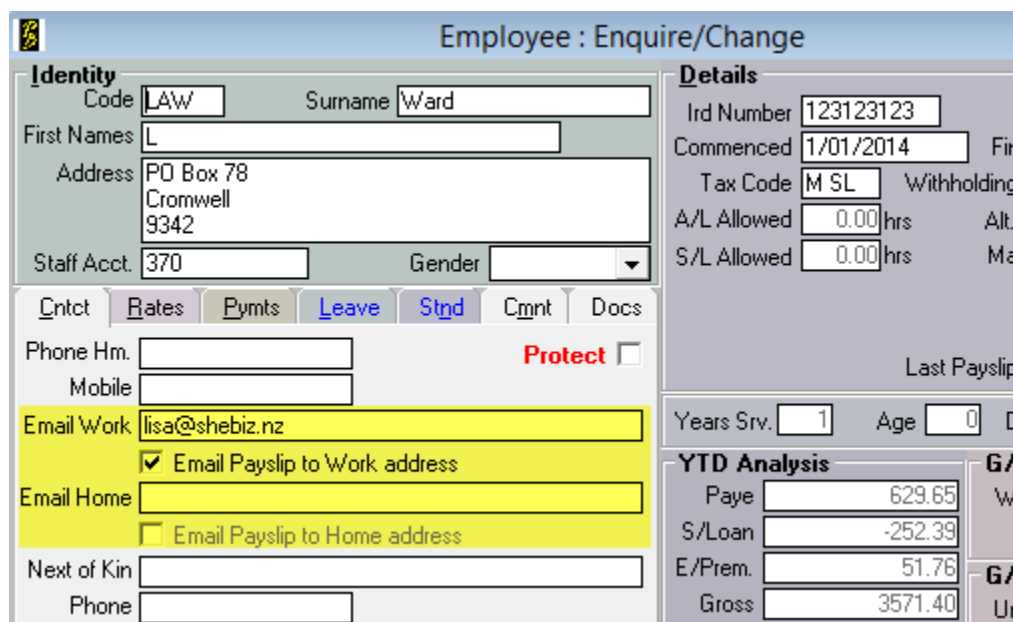
Manual Email Function

Open the **Print Options** from an Invoice screen, check the Email To and From addresses, add a message if desired and click on **Email**.

For full details see **Email via Print Options** later in this document.

Email Payslips

PayBiz main menu > Employees > Contact tab

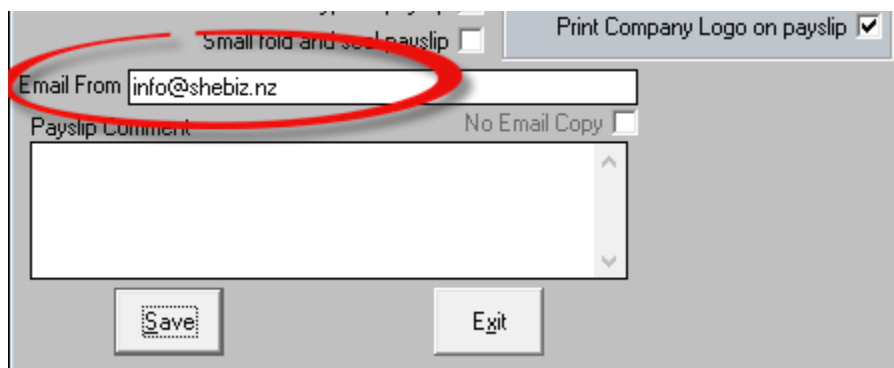


The screenshot shows the 'Employee : Enquire/Change' form. The 'Identity' tab is selected, showing fields for Code (LAW), Surname (Ward), First Names (L), Address (PO Box 78, Cromwell, 9342), Staff Acct. (370), and Gender. The 'Details' tab is also visible, showing Ird Number (123123123), Commenced (1/01/2014), Tax Code (M SL), and A/L Allowed (0.00 hrs). The 'Email Work' field is highlighted in yellow, showing the email address lisa@shebiz.nz. The 'Email Home' field is also highlighted in yellow, showing the email address lisa@shebiz.nz. The 'Email Payslip to Work address' checkbox is checked, and the 'Email Payslip to Home address' checkbox is unchecked. The 'Protect' checkbox is unchecked. The 'YTD Analysis' section shows Paye (629.65), S/Loan (-252.39), E/Prem. (51.76), and Gross (3571.40).

Figure 5: Email settings on Employee

- If there is a valid email address entered, tick the appropriate checkbox to set this employee to have their payslips emailed to either the Work or Home address.

PayBiz main menu > Payroll > Payslip Setup

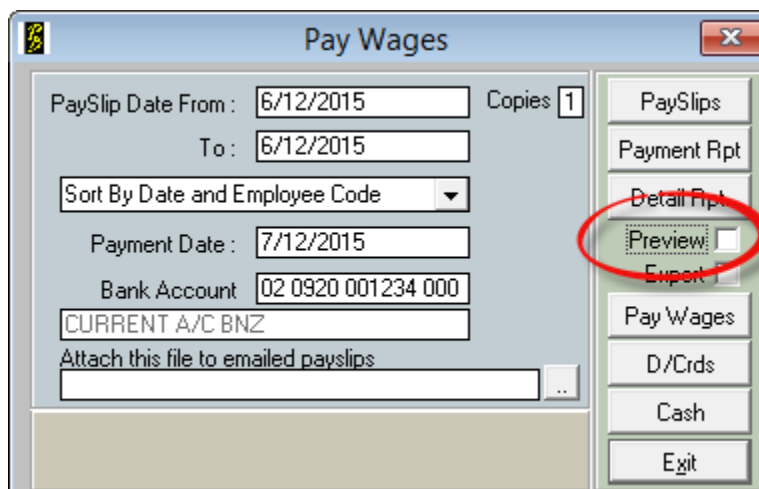


The screenshot shows the 'Payslip Setup' form. The 'Email From' field is highlighted with a red circle, showing the email address info@shebiz.nz. The 'Print Company Logo on payslip' checkbox is checked. The 'Payslip Comment' field is empty. The 'Save' and 'Exit' buttons are visible at the bottom.

Figure 6: Email settings on Employee

- Enter a valid email address in the **Email From** field. This should be the email employees can reply to if they have any queries.

PayBiz main menu > Payroll > Pay / Check Wages



The screenshot shows a 'Pay Wages' dialog box with the following fields and buttons:

- PaySlip Date From: 6/12/2015
- To: 6/12/2015
- Copies: 1
- Sort By: Date and Employee Code (dropdown menu)
- Payment Date: 7/12/2015
- Bank Account: 02 0920 001234 000
- CURRENT A/C BNZ
- Attach this file to emailed payslips (with a browse button ...)
- Buttons on the right: PaySlips, Payment Rpt, Detail Rpt, Preview (checkbox, circled in red), Export, Pay Wages, D/Crds, Cash, Exit.

Figure 7: Email Payslips

- Ensure Preview is NOT ticked, then click **PaySlips**.
- Payslips for employees set to Email will be automatically emailed to their selected email address. The remaining payslips will print on the printer.
- To attach an additional file to the emails, click on the ... button to browse your computer for the file and click **Open** in the browse window to add it.

Email via Print Options

Individual Invoices and Payslips can be emailed via the Print Options screen.

Click on the **Print Options** button on the Debtor Invoice, Creditor Invoice or Payslip screen.

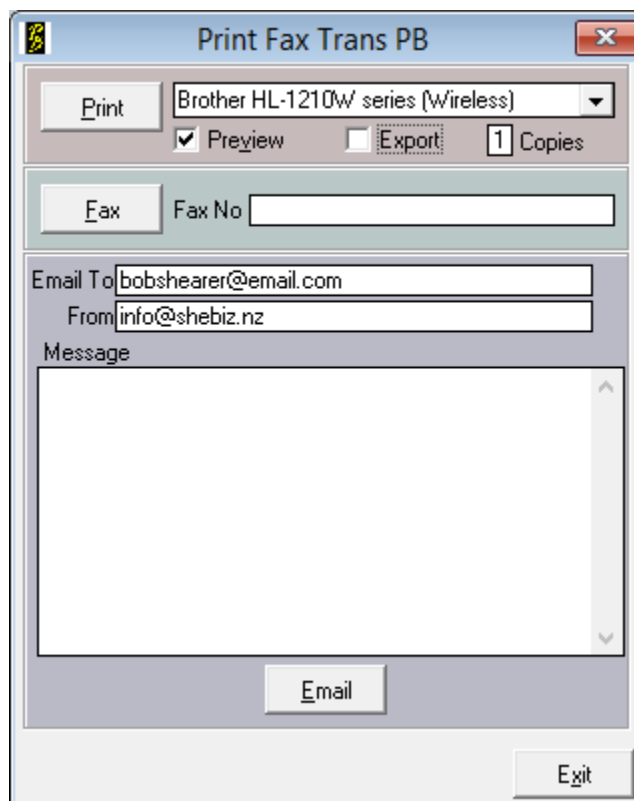


Figure 8: Print Options

Field	Description
Email To	Enter the email address to send the invoice or payslip to. Defaults to the email address entered for the Debtor, Creditor or Employee, but can be overwritten. Separate multiple email addresses with a comma.
From	Enter the email address to send from. Defaults to the email address for the current user logged in, but can be overwritten.
Message	Optional. Free text field to enter any message you wish to appear in the body of the email.
Email	Click to send the email.

Email via Export

Payslips and Reports can also be emailed.

Most reports have an **Export** option.

This is displayed as a checkbox, sometimes near to the Preview checkbox, or just under the Set Up button.

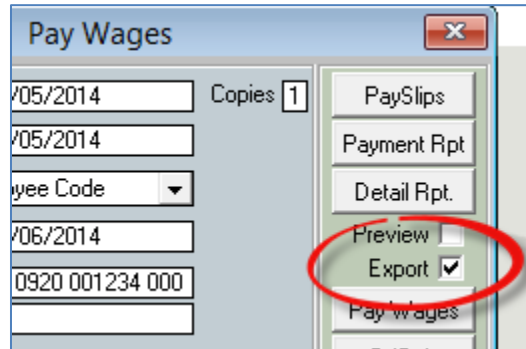
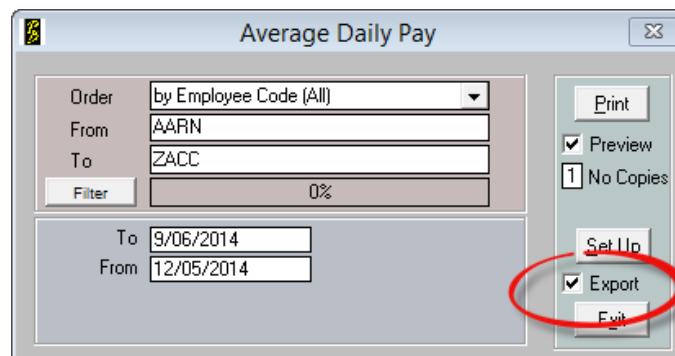



Figure 9: Export Checkbox examples

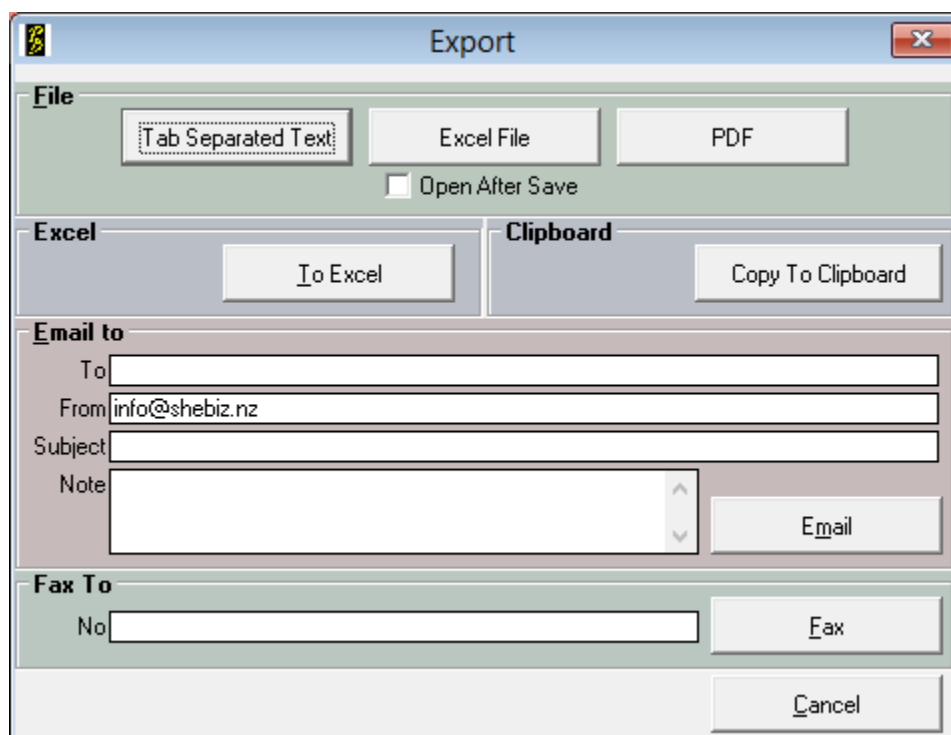
Tick the **Export** checkbox, then click the appropriate report button or click **Print**.

This will open the **Export** window.

This provides a variety of export options, but this document will only detail the email options.

Note:

- When exporting a batch of reports, such as PaySlips, Batch Invoices or Statements, all of the individual documents will be grouped together into a single PDF document and emailed to a single email address.



The screenshot shows an 'Export' dialog box with the following sections:

- File:** Contains three buttons: 'Tab Separated Text' (highlighted with a dashed border), 'Excel File', and 'PDF'. Below these is a checkbox labeled 'Open After Save' which is currently unchecked.
- Excel:** Contains a button labeled 'To Excel'.
- Clipboard:** Contains a button labeled 'Copy To Clipboard'.
- Email to:** Contains four text input fields: 'To', 'From' (pre-filled with 'info@shebiz.nz'), 'Subject', and 'Note'. To the right of the 'Note' field is an 'Email' button.
- Fax To:** Contains a text input field labeled 'No' and a 'Fax' button.
- Cancel:** A large button at the bottom right of the dialog.

Figure 10: Export window

Field	Description
To	Enter the email address to send the report to.
From	Enter the email address to send from. Separate multiple email addresses with a comma. Defaults to the email address for the current user logged in, but can be overwritten.
Subject	Optional. Enter a subject for the email.
Message	Optional. Free text field to enter any message you wish to appear in the body of the email.
Email	Click to send the email.

Sample Emails

A default subject and message are applied to all emails relevant to the document or report being emailed. The email signature for the current user logged in is appended to the bottom of the email.

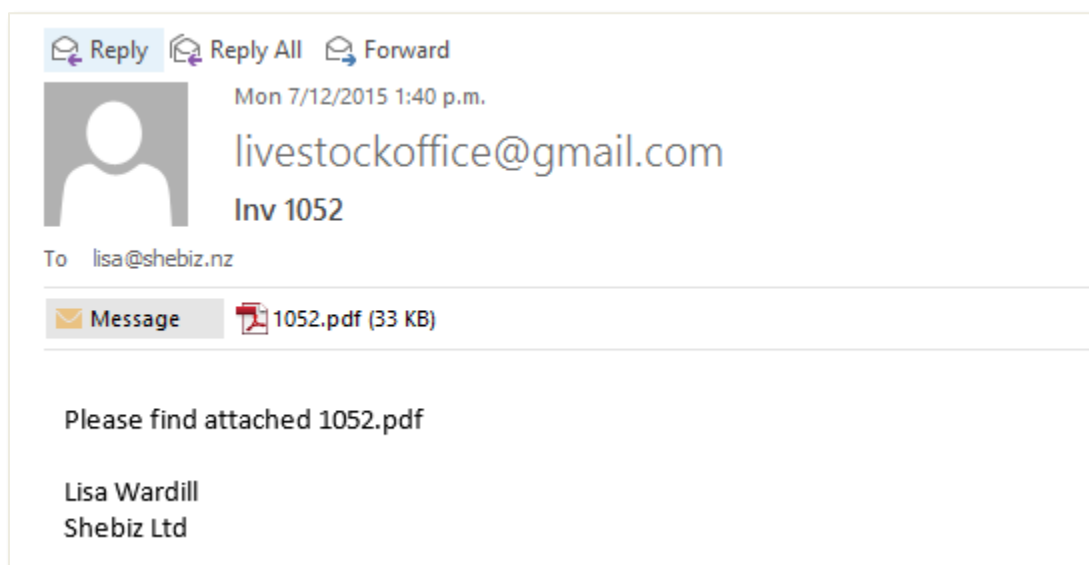


Figure 11: Default Invoice Email

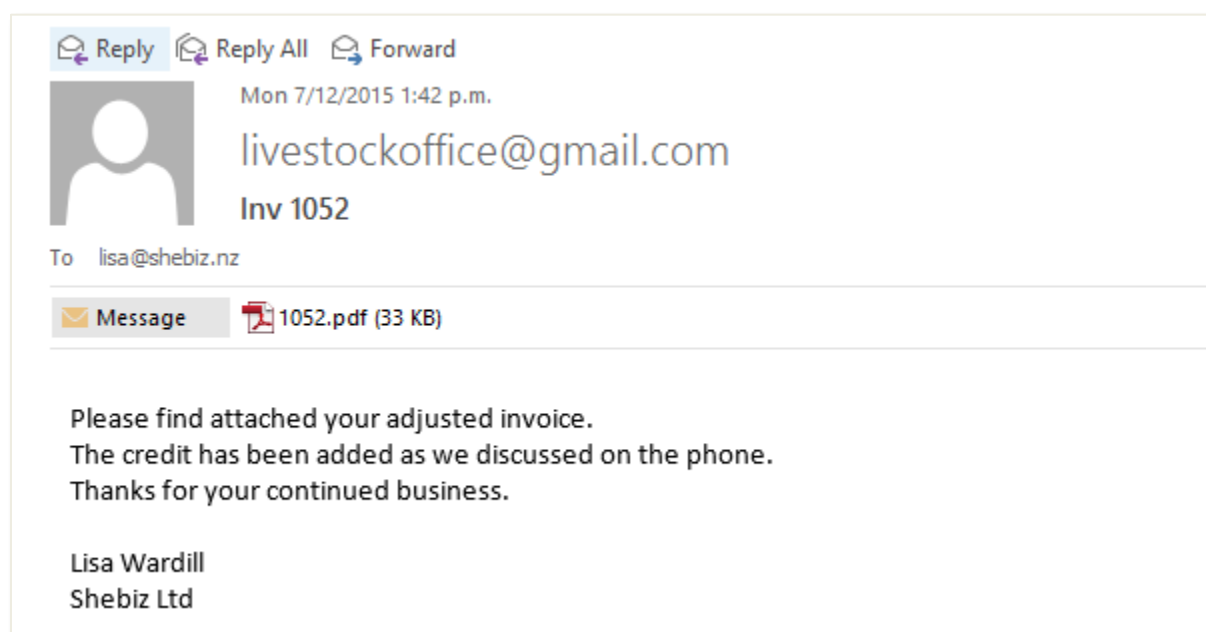


Figure 12: Email with custom message added