

PayBiz – Email

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Mass Communications

The mass communications module includes printing to PDF 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 > System > Email Settings

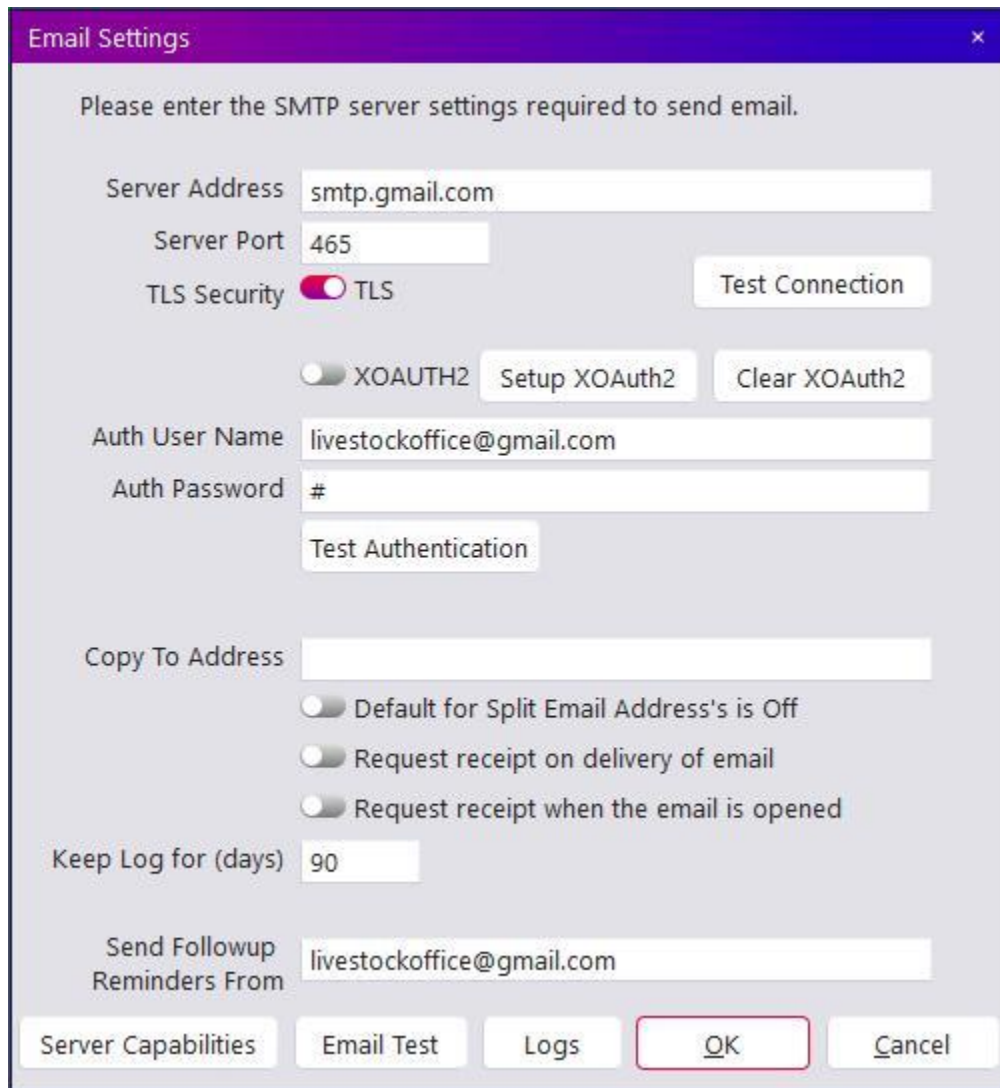


Figure 1: Email Settings

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.
TLS Security	Set if the connection uses TLS security.
Test Connection	Click to test the connection settings.

Continued...

Field	Description
XOAuth2 Auth User Name Auth Password Test Authentication Copy To Address Default for Split... Request receipt... Keep Log for (days)	Set if the connection uses OAuth 2.0 authentication. Use the buttons to configure or clear the settings. The username for the account. The password for the account. Click the Test button to test the authentication. Click to test the authentication settings. Enter a valid email address to send copies of all emails to. Not used in PayBiz. Set the appropriate options to request receipts when the email is delivered or opened. 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.
Server Capabilities Email Test Logs OK Cancel	Click to test the Server entered. Click to send a test email using the current settings. Opens the Email Log. Save settings and Exit. Exit the window without saving any changes.
Send Followup Reminders From	Enter the email address to use when sending followup reminders. If not set then email reminders for followups will not be sent

Email Log

PayBiz main menu > File > Company > 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.

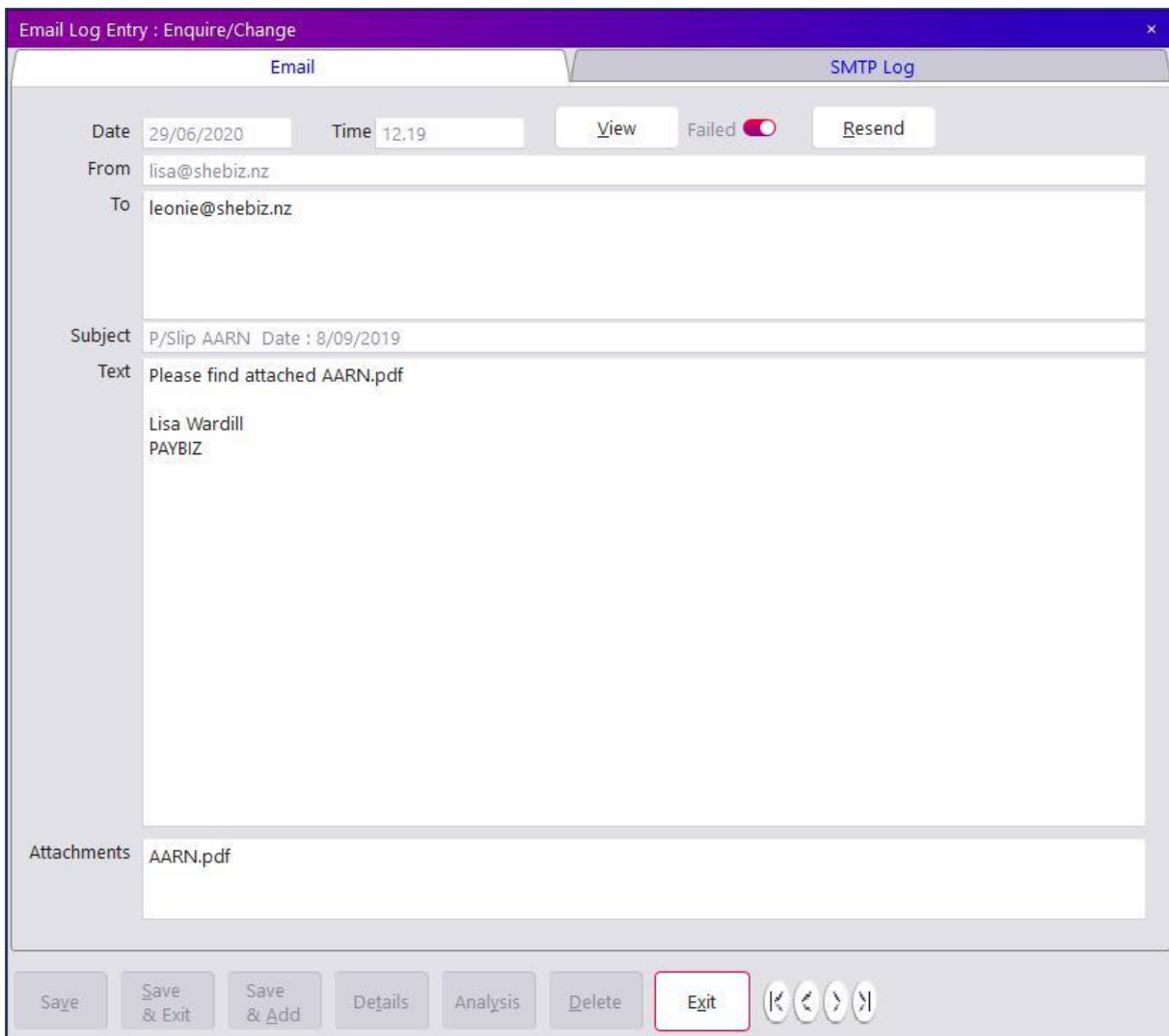
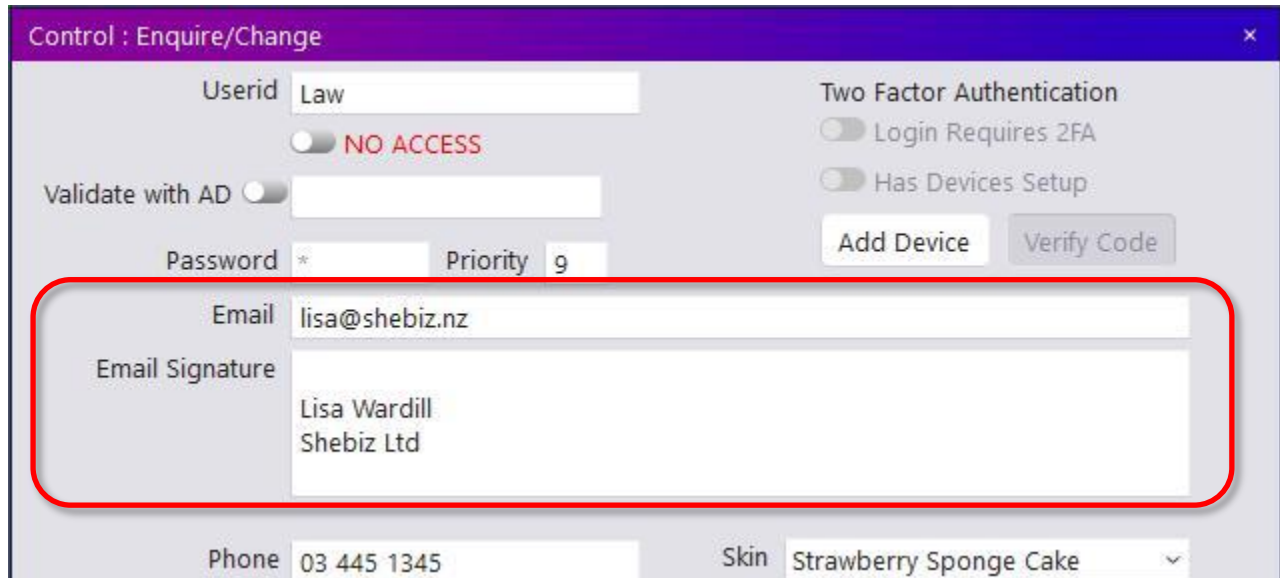


Figure 2: Email Log

- 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 > User File



Control : Enquire/Change

Userid Two Factor Authentication

NO ACCESS Login Requires 2FA

Validate with AD Has Devices Setup

Password * Priority

Email

Email Signature

Lisa Wardill
Shebiz Ltd

Phone Skin

Figure 3: Email settings on User file

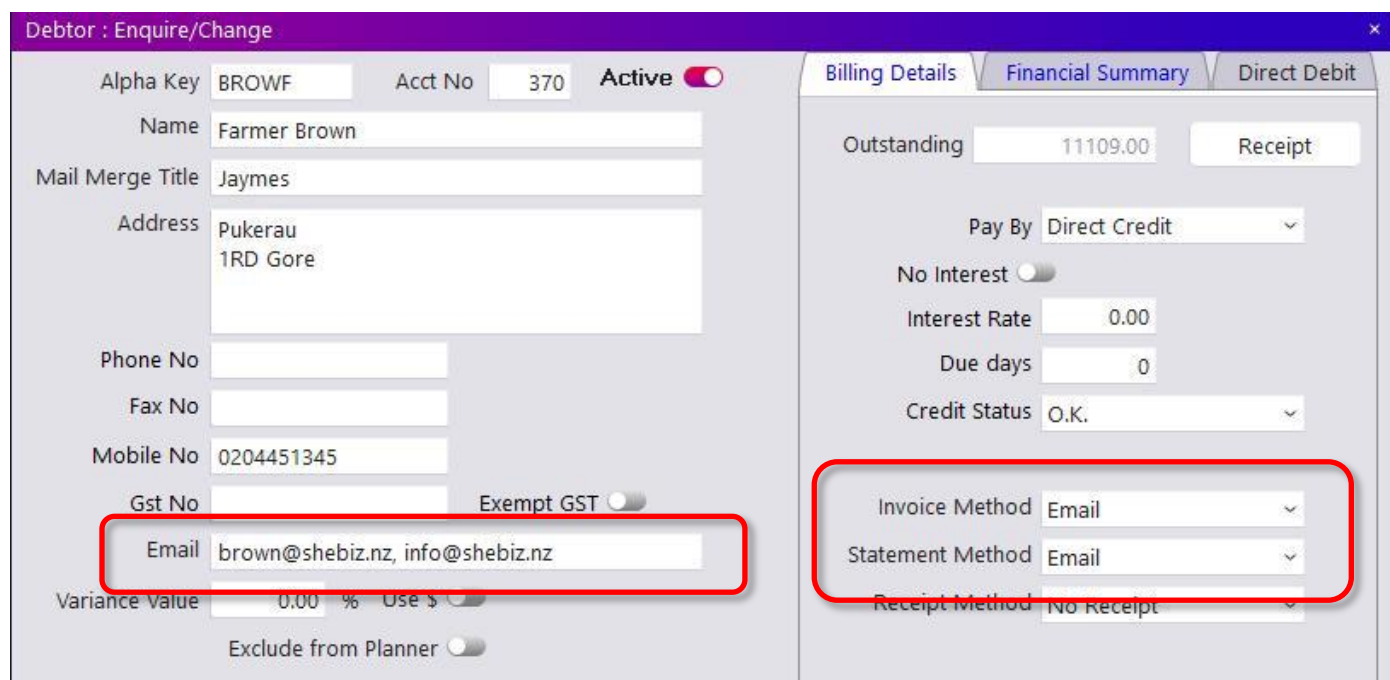
- Enter a valid email address for each user of the system. This will be the default From address used for emails sent by this user.
- Enter a signature. If entered, this will print at the bottom of the email.

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.



The screenshot shows the 'Debtor : Enquire/Change' window. On the left, the 'Email' field is highlighted with a red box and contains the text 'brown@shebiz.nz, info@shebiz.nz'. On the right, under the 'Billing Details' tab, the 'Invoice Method', 'Statement Method', and 'Receipt Method' dropdown menus are also highlighted with a red box. The 'Invoice Method' and 'Statement Method' are set to 'Email', and the 'Receipt Method' is set to 'No Receipt'.

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 set. The Debtor not set to Email will print normally.

Note:

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

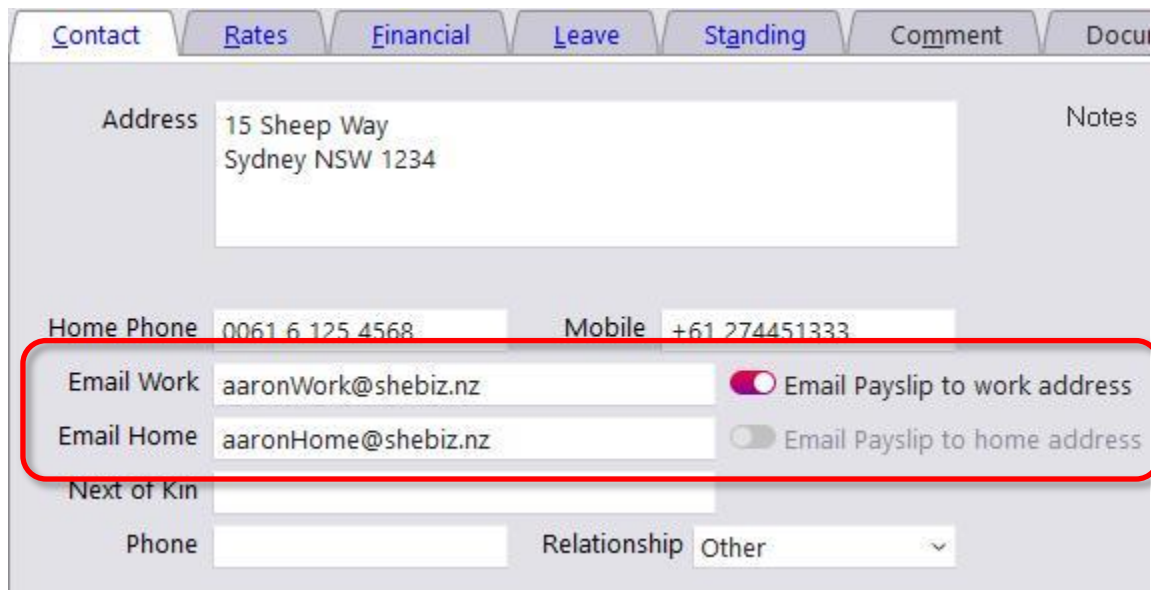
Manual Email Function

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 'Contact' tab of an employee's profile. The 'Address' field contains '15 Sheep Way, Sydney NSW 1234'. The 'Home Phone' is '0061 6 125 4568' and the 'Mobile' is '+61 274451333'. The 'Email Work' field is 'aaronWork@shebiz.nz' with a checked 'Email Payslip to work address' checkbox. The 'Email Home' field is 'aaronHome@shebiz.nz' with an unchecked 'Email Payslip to home address' checkbox. Other fields include 'Next of Kin', 'Phone', and 'Relationship' (set to 'Other').

Figure 5: Email settings on Employee

- If there is a valid email address entered, set 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' screen. It features several toggle switches: 'Show Entitlement not Accrued' (unchecked), 'Show Ytd Gross and Paye' (checked), 'Use NZ Payday Filing' (checked), and 'Use AU STP Filing' (unchecked). The 'Email From' field is highlighted with a red box and contains the email address 'lisa@shebiz.nz'. There is also a 'No Email Copy' toggle switch at the bottom right.

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

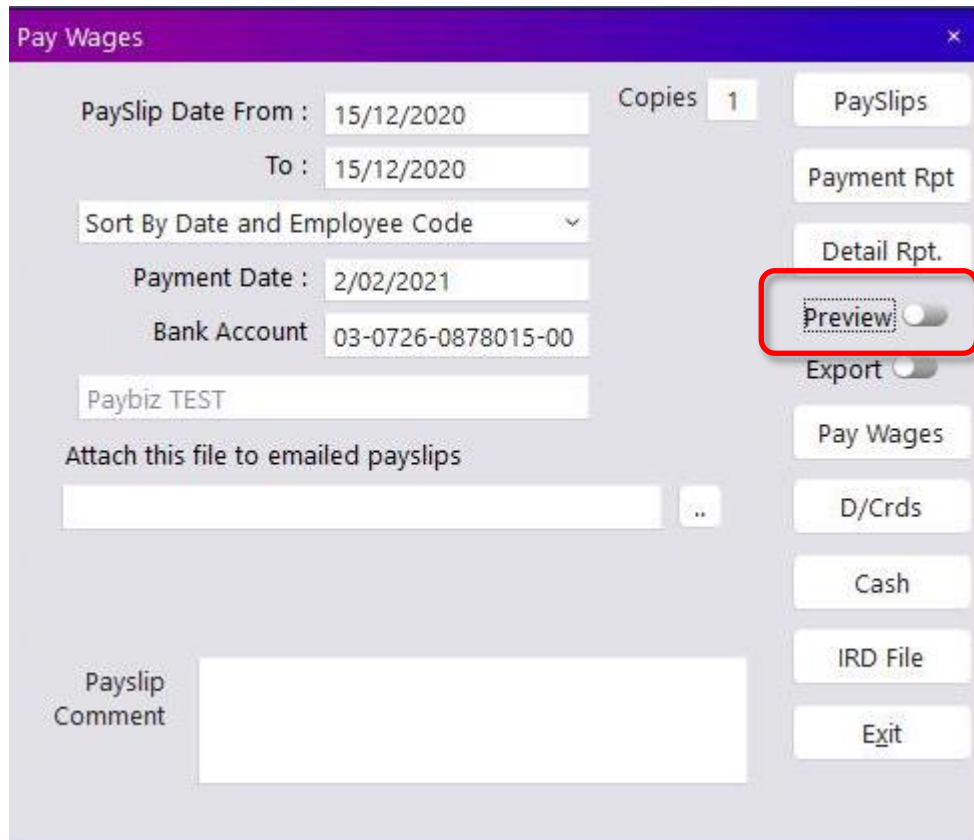


Figure 7: Email Payslips

- Ensure Preview is NOT set, 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.

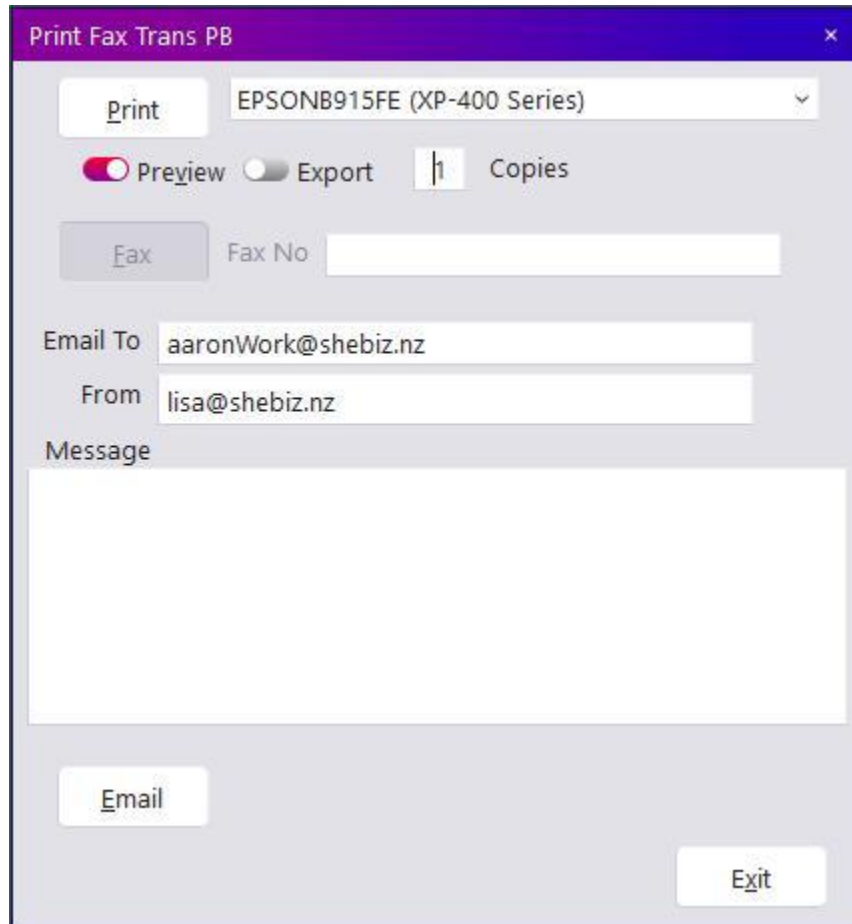


Figure 8: Print Options

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.

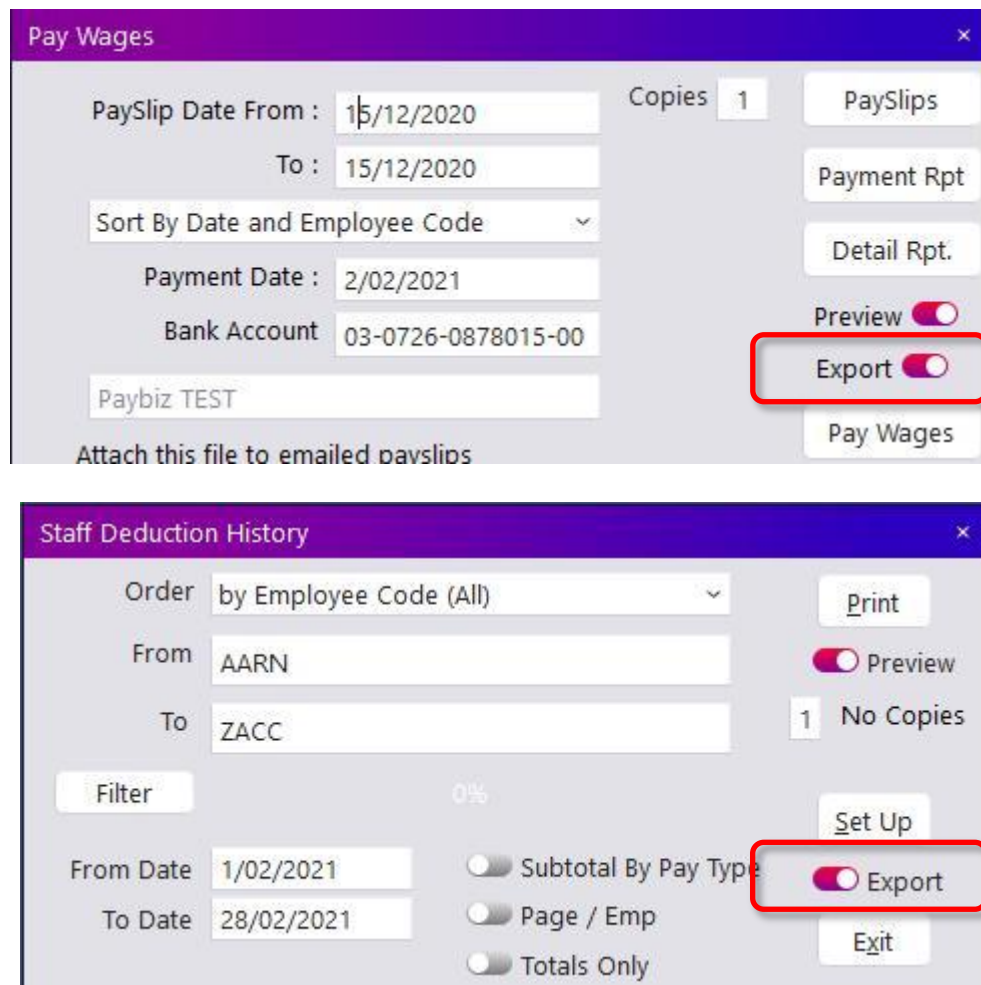


Figure 9: Export Checkbox examples

Set 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.

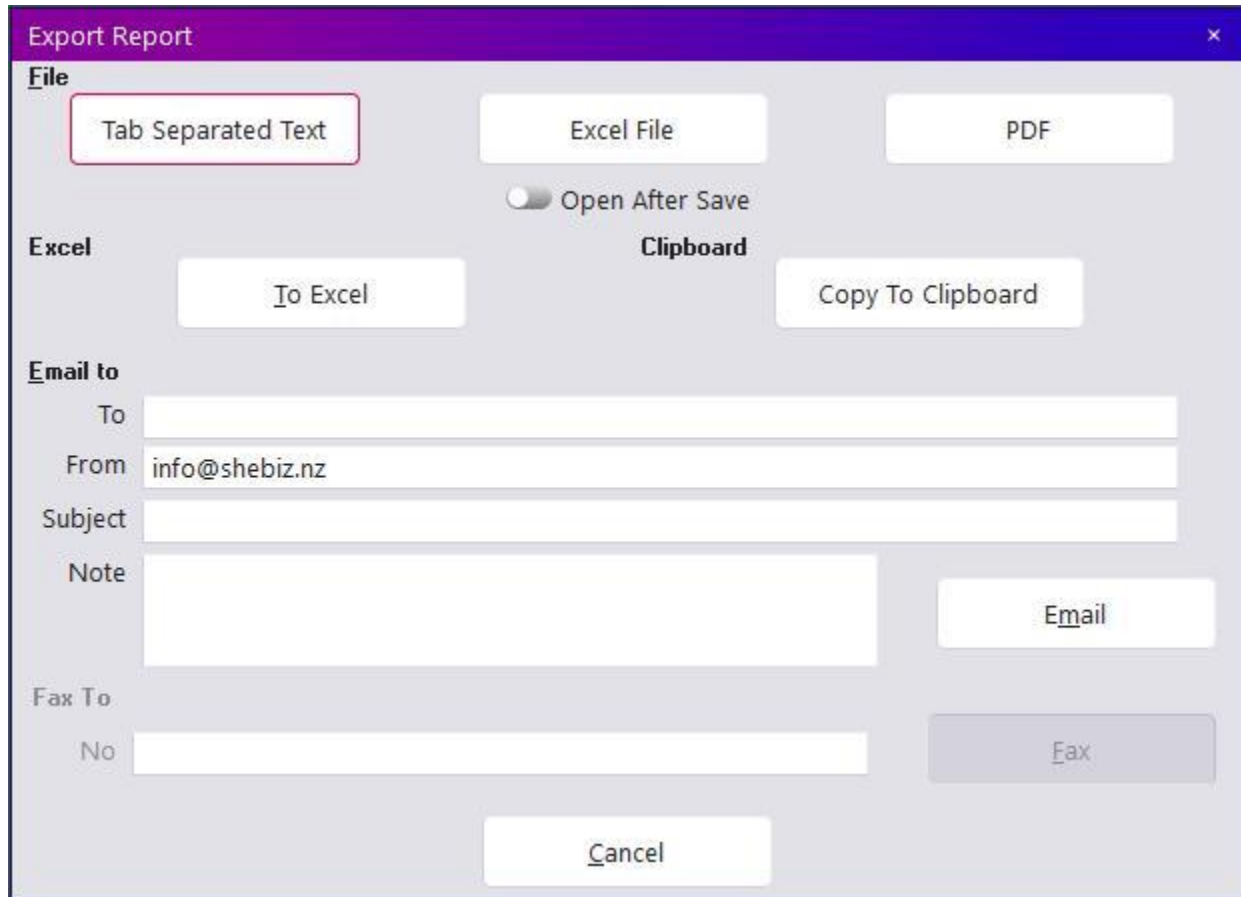


Figure 10: Export window

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.

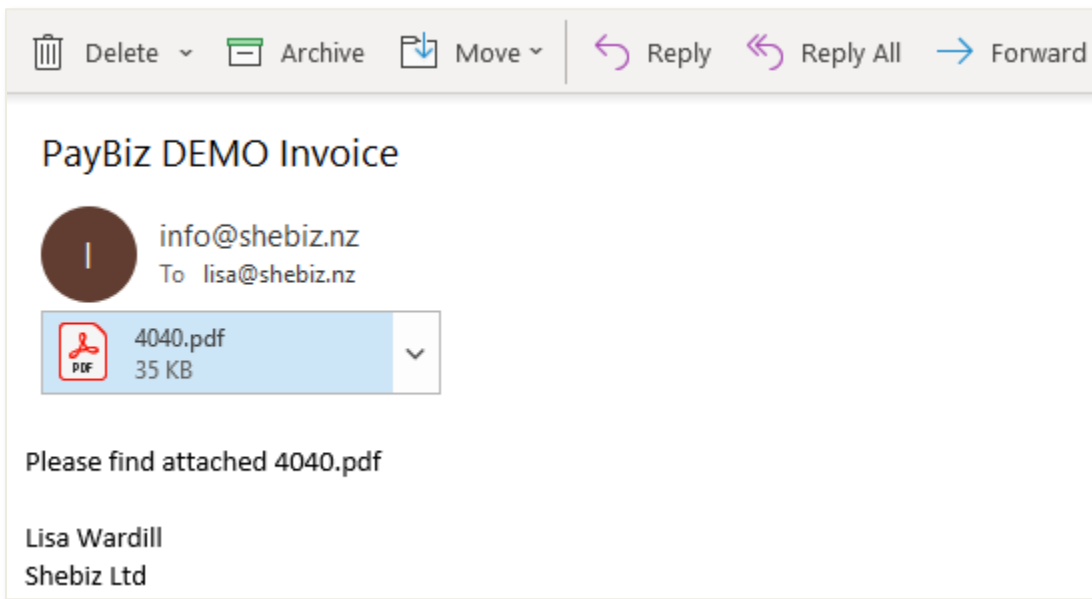


Figure 11: Default Invoice Email

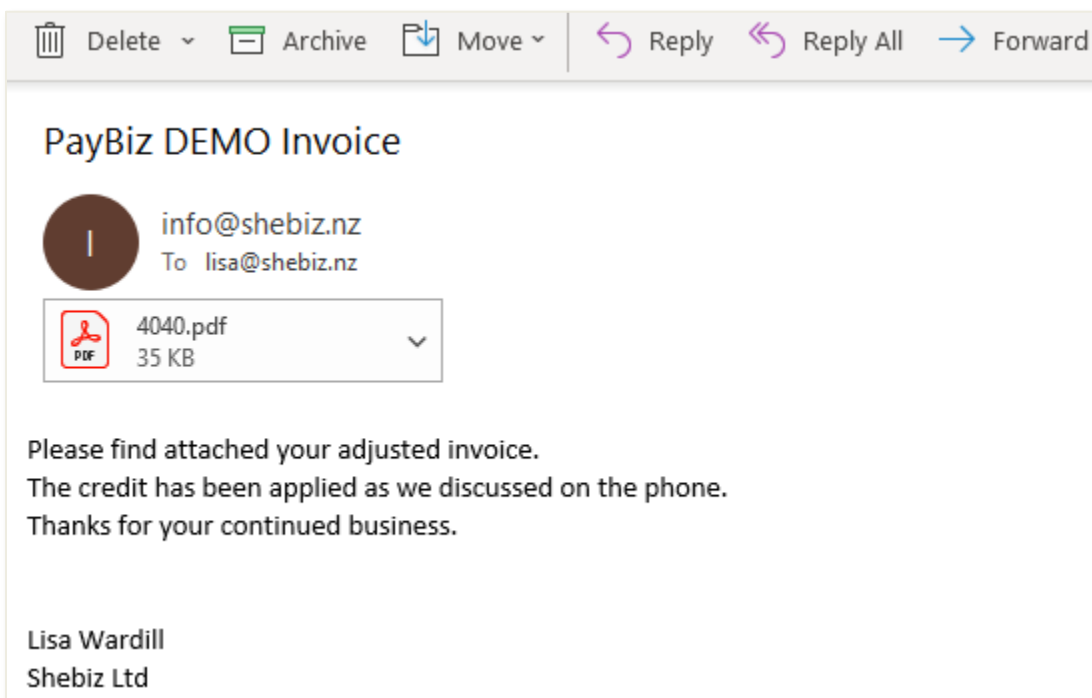


Figure 12: Email with custom message added