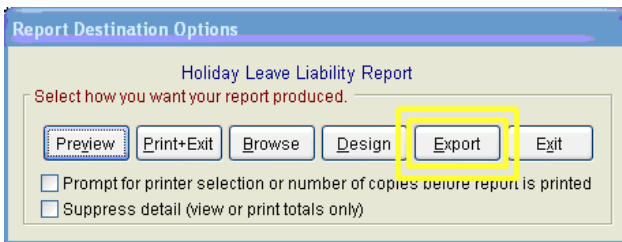


SmoothPay provides the means to *Export* any payslip or report as a PDF (Acrobat reader format), as well as many other formats (such as Excel, Word etc), and to optionally send the file produced as an email attachment – to employees, managers, HelpDesk etc.

This is accomplished using the “Export” option on the Report Destination Options dialog displayed when any report is produced.

In addition, your data can easily be sent to the HelpDesk (or any other email address) directly from the Backup screen (older backup images can also be emailed directly from the Restore screen).

## Create PDF documents from any report (& optionally email)



The Export facility also provides an option to email the resulting file, and intelligently applies rules to determine who the report should go to (a report for a single employee will typically use the employee’s email address if there is one, otherwise it’ll use the company email address). You have the option to change the email address before it is sent, and have control over how reports are sent (via your email client or direct using SMTP) in the email configuration screen (see below).

Note that Word DOC and Excel XLS files will only work properly if these applications are installed on your computer. If they are not installed, you can still generate compatible files (using the RTF option for word processing docs, and Raw XLS option for spreadsheet docs). In general though, the default PDF option should be used for the best presentation and portability (as the Acrobat Reader software is freely available, and is supplied on the SmoothPay CD under the utilities section, or can be installed free from the Adobe website).

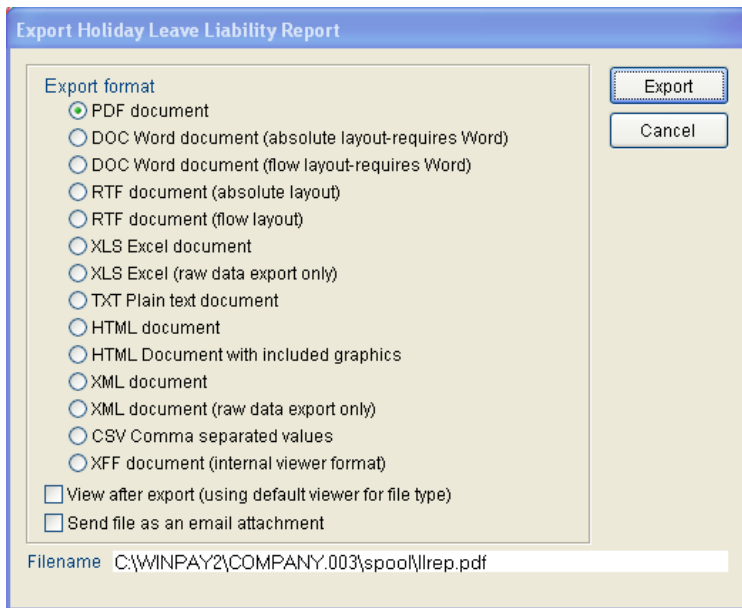
It’s also really handy if an employee needs an earnings certificate urgently – just email it.

### How do I create a PDF report and email it?

Run the report you want in the usual way – in this example we’ve selected a Leave Liability Report from Reports..Leave Reports. The Report Destination Options dialog is displayed:

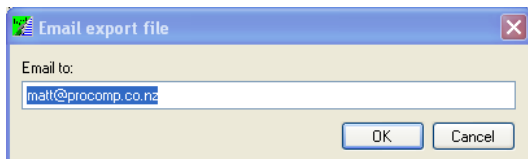


Choose Export and the following screen will be displayed:



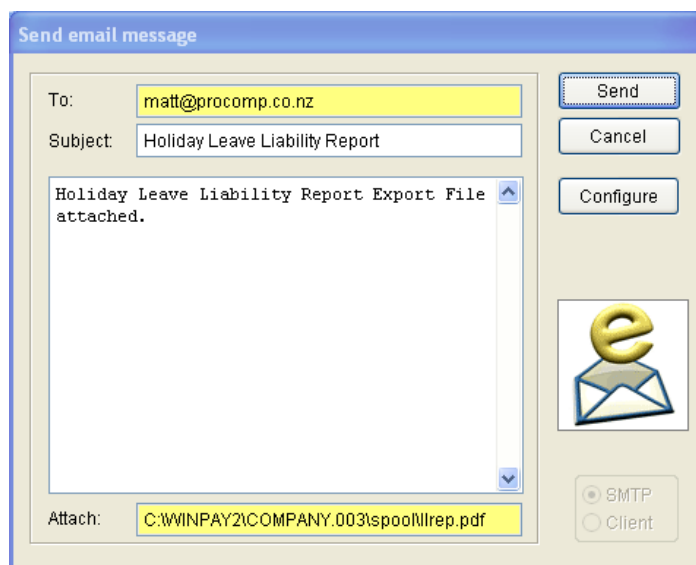
Note the destination of the file that will be created (especially if you are not wanting to email it, but wish to refer to it later).

If you wish to email the file, click the “Send file as an email attachment” option, then choose Export. The report will be converted to PDF (in this example), then the following will be displayed:



You can choose OK to accept the email address displayed (or change it first), or Cancel to prevent the file being emailed anywhere.

Assuming you wish to email the file, choose OK:



You can type any message to go with the default text (report title information), then choose Send or Cancel.

Refer to the Email Setup notes below for configuration options.

## Aggregate Standard reports to PDF (& optionally email)

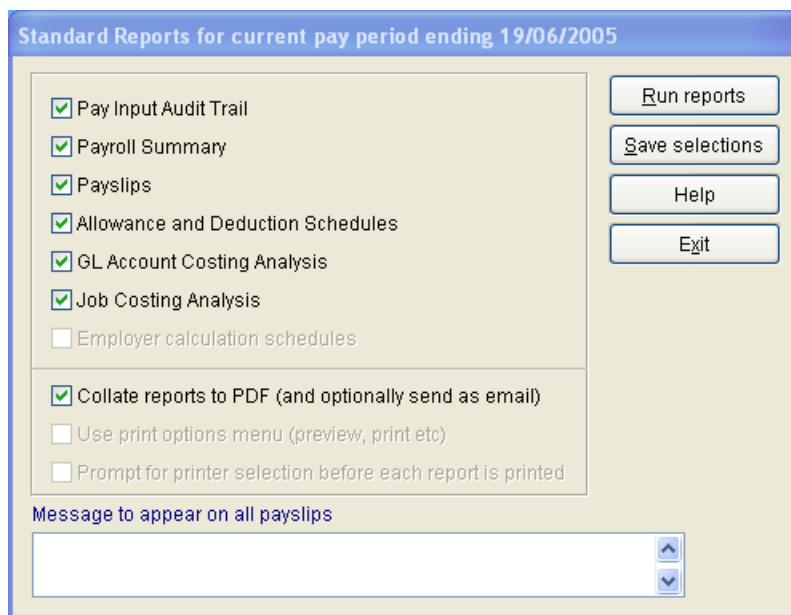
The Standard Reports screen now provides for the aggregation of all selected reports (including payslips) into a single PDF document, and optional emailing of the document to any recipient.

This is particularly useful for sites who are processing payroll on behalf of another company or branch and wish to print payslips and print or check reports at the destination instead of in-house, or simply to provide an archive copy (you'd need to move it somewhere safe so it doesn't get overwritten by the next payroll process).

See below for a worked example.

## How do I aggregate my Standard Reports and send them to someone else for printing/checking?

In the Standard reports screen, after entering or importing all Pay Input for the pay period...

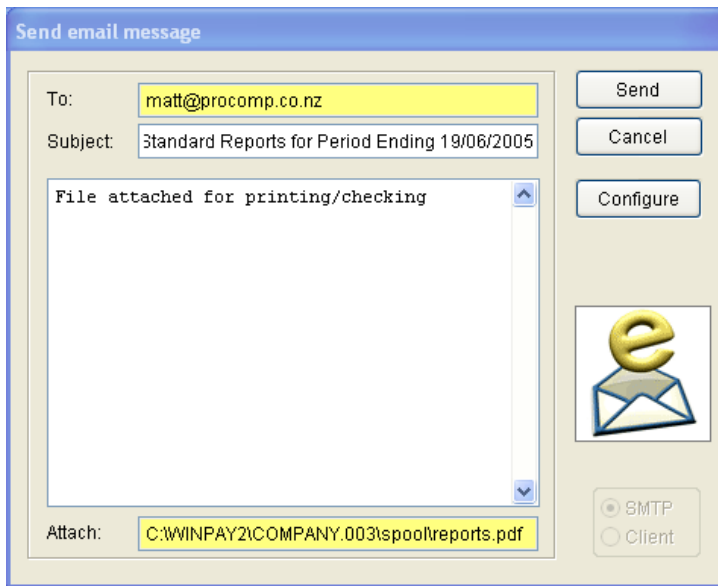


Choose the "Collate reports" option, then Run reports. After all selected reports have been "collated" into a single PDF document, the option to email them is offered:

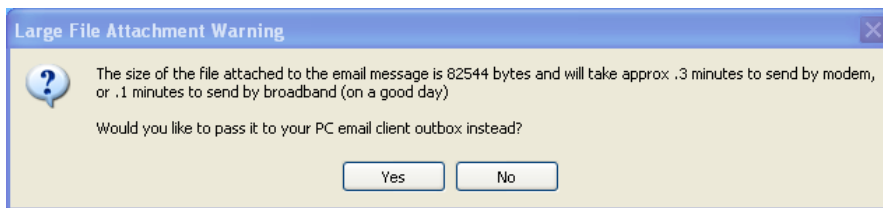


You can choose OK to accept the email address displayed (or change it first), or Cancel to prevent the file being emailed anywhere.

Assuming you wish to email the file, choose OK:



If the file exceeds a certain threshold, and your preferred method of delivery is via SMTP rather than your workstation email client, the following message would be displayed:

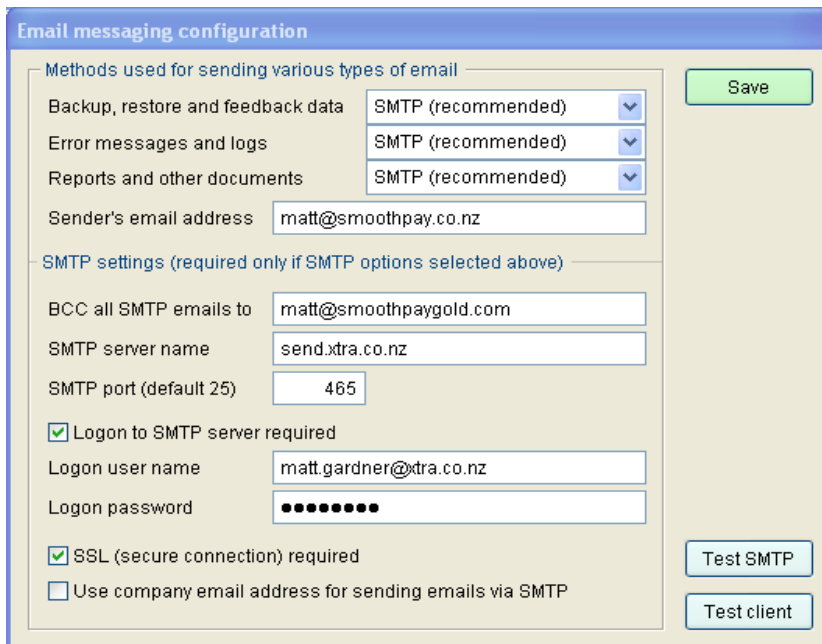


In this case, I'd answer No, but you could pass the file to your workstation email client if you wish - especially if the file is very large (more than 3MB).

## Email Setup

In order for SmoothPay to send reports, data and feedback etc by email, you need to make sure that your computer has a working internet connection and optionally a working email client installed such as Outlook, Outlook Express, Thunderbird, IncrediMail etc (SmoothPay uses your email client by default, but if you don't have email installed, or it's not configured properly, it won't work).

If you don't have a working email client but still have an internet connection, don't worry. As long as your computer is connected to the internet, either directly or via a network, then you can configure SmoothPay's email options to send emails without having to worry about an email client by setting the SmoothPay email options (Company Setup..Email Setup..Configure, or the Configure option on the email screen accessed via Export Report) to use the SMTP option. The associated settings such as SMTP server depends on who provides your internet services (Xtra, TelstraClear, InspireNet, Wave etc). If you need help setting these up you should contact your technical support person.



From here you can also test that the selected options actually work (an email will be sent to the helpdesk, and you can check with them to make sure the test was successful – if the helpdesk receives your test email, they'll respond with "Got that." In a reply email).

## Troubleshooting email from SmoothPay

The most likely and common causes of failure are:

- no internet connection available
- an incorrectly configured email client on your workstation (outlook etc)
- incorrectly configured SMTP server name (if using SMTP which bypasses your email client), or
- internet security software (firewall) is preventing communication via SMTP port 25 (or other secure port) from your workstation

These problems should be easily rectified by your technical support person.

### **XTRA! Is very likely to cause a few issues, so use the following guide to help resolve them:**

If your domain or email is hosted by XTRA then your settings require much more attention to detail. XTRA have recently changed the way their servers work, rejecting emails sent using email addresses that don't match their list of known addresses for you. You simply need to register each additional email address you use with XTRA using the instructions at:

<http://www.xtra.co.nz/help/0,,4155-8603572,00.html#pro>

(you would need to register yourname@yourdomain if the name being used to send the emails from SmoothPay is not the same as your XTRA email account name.

Once you have done that, the recommended settings areas follows:

For SMTP (the recommended settings):

SMTP on all options  
SMTP server name: send.xtra.co.nz (NOT smtp.xtra.co.nz)  
SMTP Port: 465 (not 25)  
Logon to SMTP Server: Tick  
Requires your XTRA username and password  
SSL: Tick

We would suggest that you also use the BCC setting so that copies of all emails sent from Smoothpay are also sent to yourself (for instance) so that you can be sure that what was sent has actually worked.

**If you're using an in-house email server**, then we suggest it be bypassed completely (we can't advise on the settings you would need to use in order to use it - you'd have to contact your IT person and do a bit of experimenting). If bypassing, then you need the company's XTRA email settings to make everything work correctly (the same account name and password required for accessing your company's webmail account at XTRA)

## Emailing your data to the HelpDesk

If you have a question related to pay input or leave, then generally the HelpDesk will require a copy of your data for examination in order to assist with resolving any problems.

This can be easily achieved from the Backup screen, by ticking the option "Email data to HelpDesk", and this is the preferred option, as we then see the same data you're seeing:

SmoothPay Backup Utility

Backup options

Backup to

- Diskette Drive A:
- Diskette Drive B:
- Other Drive letter
- Other folder

Erase each diskette (applies only to diskettes)

Email copy of data to SmoothPay HelpDesk (or other recipient)

Internet Backup (FTP) to SmoothPay offsite storage

Begin Backup

Exit

Backup protects your payroll data by recording a complete copy to an internal archive (for fast and reliable recovery if needed) as well as to alternate media (for offsite data protection).

TIP: It is recommended that you use a set of at least five backup diskettes to be used in rotation (different disk each pay period) in case of diskette failure. You can also use any other media written via drive letter access (such as USB, CD/RW or DVD)

Please note that if you choose to backup to other drive letters or folders that are not on external media, you are responsible for implementing appropriate system backups

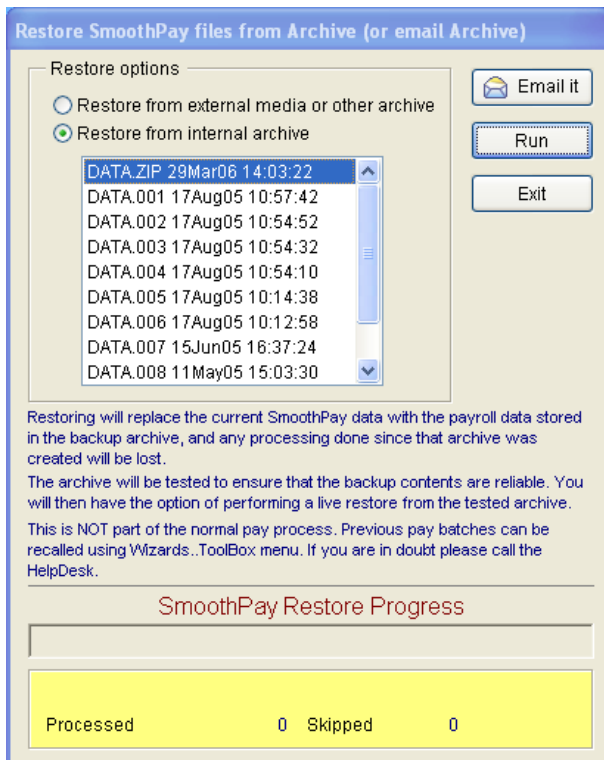
SmoothPay Backup Progress

Processed 0 Skipped 0

Then, complete the backup. The email address and message dialogs (as above for emailing reports) will be displayed so you can add any specific information about the problem that you want looked at.

NOTE: You can also use the free Internet backup option for safekeeping of your data offsite (on our webserver).

Similarly, the Restore screen provides for the direct emailing of existing payroll archive images:



Just select the archive you have been requested to send, then click "Email it".

*Feel free to contact our HelpDesk if you have any questions or suggestions for improving this HelpNote.*