Email Payslips from Superpay

1. Features

Superpay can connect to your email server to send payslips to employees. The payslips is sent as a PDF file attached to an email. You can choose the subject line and the body of the email.

The email subject can be one of the following:

Payslip
Payslip for [tax period]
Payslip from [company name]
Payslip from [company name] for [tax period]

The email body can be fixed text generated by Superpay, which reads:

Your payslip from [company name] is attached

If you prefer you can use a Microsoft Word document as the body of the email. We include some fields that can be mail merged into the document.

2. Using a Word document as the email body

You can use Microsoft Word to create a document that will be used as the body of the email sent to employees. Store this in the Superpay folder within your Windows Documents folder.

Superpay can mail merge some fields into this document before it is sent. These are the field codes you can use:

S - Date	Current system date in Superpay
C - Name	Company name
C - Number	Company number
E – Number	Employee number
E - Name – Title	Title
E - Name - Forename 1	First name
E - Name - Forename 2	Second name
E - Name – Surname	Last name
E - Name – Full	Full name
E - Last run period	The run period of the payslip
E - Last run date	The date of the payslip

The file to use for the email body is set in System settings or Company record, see below for details.

3. Setup

3.1 Email services

You must set up the details of the email service that Superpay will use. This can be Microsoft Exchange, Gmail, Amazon Simple Email Service (SES), or some other SMTP service. Superpay can't use Microsoft Outlook to send mail; instead it connects directly to your mail server.

From the Main menu choose 8 (Utilities), then 7 (Email accounts). Press F2 and choose Add.

In the wizard, choose the following:

- The service type.
- Give it a name (this is just used to identify the service in this list).
- Choose whether you want to send plain text or HTML emails.
- Enter the address the emails will be sent from. Usually this has to be the login name of the mail service.

Press the Page down key to move on. The next screen depends on the service type you selected.

Microsoft Exchange

Enter the user name and password for the Exchange account.

If you have auto discovery set via DNS you can omit the server name, otherwise enter the name of the server.

If you don't want the emails Superpay sends to appear in your Sent items folder, change 'Save in Sent items' to N for no.

Gmail

Enter the user name and password for the Gmail account.

If the Gmail account is set to use two factor authentication (i.e. you have to enter a code from a mobile phone to access Gmail), then you will need to log on to Gmail and get a password to use in Superpay. Enter this password rather than your normal Gmail sign on password.

SMTP

Enter the user name and password for the SMTP account, and the name of the SMTP server.

SMTP with default user or anonymous user

Enter the name of the SMTP server.

Then press the Page down key to store the details. If you wish you can add details of additional email services.

3.2 Message settings

If you will be using the same email service for all or most of your Superpay companies, identify the service in Company/Send email/Default message settings.

Go to Utilities, System settings, and select the Account field in the box headed Email setup. Press F7 and the email service(s) you set up in the previous step will be displayed. Pick the one you want to use and press Enter.

In the Subject and Body fields, press F7 and select your choices for the email subject and body.

If you're using a document as the email body, enter the name of the document in the 'Body document' field. You can press F7 on this field to browse for a file.

If you want different settings for a particular company, go to Company/Send email/Company message settings and fill in these fields in the same way as above.

Press F2 to store the settings.

3.3 Company message settings

Go to Company, then Company record, and page down to the second company record screen.

Near the top left of the screen is a field called 'Default payslip types'. If you want all employees to receive email payslips, press F7 on this field and set the Email option to Y. Store this choice and the company record.

3.4 Employee record

At the bottom left of each employee record screen there is a box headed Contact.

Here you set up:

- The employee email address.
- The password to be used for the PDF attached to the email. If this is blank the PDF will not be password protected.
- The payslip types for this employee. If this field is set to 'Default' it means that the payslip types for this employee will be as set in the company record. Press F7 if you'd like to override the defaults.

4. Operation

Payslips are emailed from the Company menu. Once you've set up the email service, the employee email addresses, and set the payslip type to email, go to Company, then Send email payslips.

After entering the tax period and employee range (just like printing payslips), Superpay will display the number of emails to be sent and the address they will be sent from. If this is what you expect press Space to continue.

A progress message will be displayed while payslips are created and sent, followed by a completion message.