

Emailing Payslips

Disclaimer:

The Knowledge Base is our platform to share information with our customers and provide you with a 'help me, help myself' environment. The guides and documents provide step by step solutions to assist you with your queries based on the acquisition of solutions from previous enquiries.



Important Note

- The information contained in these articles should be treated as guidelines.
- Some articles are version and build specific.
- Articles may not be applicable to all environments.
- If the proposed solution is not successful, please post your comments below or contact the Sage Pastel Payroll and HR Department directly on (011) 304 4300 or support.pastelpayroll@sage.com.

FAQ

Question:

How do I email payslips from Sage Pastel Payroll & HR?

Solution:

Note: Your default email program must be Microsoft Office Outlook

1. Go to **Setup...Company parameters**
2. Select the **Settings** tab
3. Within the **Security** field, insert an **Email Encryption Password**.

The screenshot shows the 'Setup Company Parameters - Sole Access Mode' dialog box with the 'Settings' tab selected. The 'Security' section is highlighted, showing the 'E-mail Encryption Password' field. The 'Amount Format' section shows a table with columns for '1000 Separator', 'Decimal Digits', and 'Currency Symbol'. The 'Date Format' section shows radio buttons for 'DD/MM/YYYY', 'YYYY/MM/DD', and 'MM/DD/YYYY', and a 'Sample' field with the value '31/03/2017'. The 'Employee Codes' section has radio buttons for 'Let Me Use My Own Codes' and 'Automatic Coding'. The 'Payslips' section has a checkbox for 'Suppress Zero Payslips'. The 'Auto Backup' section has a checkbox for 'Process Auto Backup'. The 'Security' section has checkboxes for 'Add Password To Zip Backup', 'Force Strong Passwords', and 'Allow Consolidation', and text boxes for 'E-mail Encryption Password', 'Retype Password', 'Consolidation Password', and 'Retype Password'.

4. Select **OK** to save your password.

The screenshot shows the same 'Setup Company Parameters - Sole Access Mode' dialog box with the 'Settings' tab selected. The 'OK' button is highlighted with a green arrow, and the 'E-mail Encryption Password' field in the 'Security' section is also highlighted with a green arrow. The 'Amount Format' section shows a table with columns for '1000 Separator', 'Decimal Digits', and 'Currency Symbol'. The 'Date Format' section shows radio buttons for 'DD/MM/YYYY', 'YYYY/MM/DD', and 'MM/DD/YYYY', and a 'Sample' field with the value '31/03/2017'. The 'Employee Codes' section has radio buttons for 'Let Me Use My Own Codes' and 'Automatic Coding'. The 'Payslips' section has a checkbox for 'Suppress Zero Payslips'. The 'Auto Backup' section has a checkbox for 'Process Auto Backup'. The 'Security' section has checkboxes for 'Add Password To Zip Backup', 'Force Strong Passwords', and 'Allow Consolidation', and text boxes for 'E-mail Encryption Password', 'Retype Password', 'Consolidation Password', and 'Retype Password'.

5. Go to **Edit...Employee Masterfile**
6. Select the **Personal Tab** of the masterfile.
7. Select **Contacts**.
8. Ensure that the **Email Address** is entered.

Note: The **Password** will default to the employee's ID number.

The screenshot shows the 'Edit Employee Masterfile' window. The 'Basic Details' section includes fields for Code (001), Title (Mr), Surname (Brown), Name (John), and Nickname. The 'Personal' tab is selected, and the 'Contacts' sub-tab is active. The 'Contact Details' section contains fields for Work Phone Number (0113044000), Home Phone, Cell Phone Number (0858527824), Fax Number, Contact/Spouse Name (Lisa Brown), Contact/Spouse No., E-mail Address (John.Brown@democompany.co.za), E-mail Password (9008300133083), and Retype Password (9008300133083). A green arrow points to the E-mail Address field.

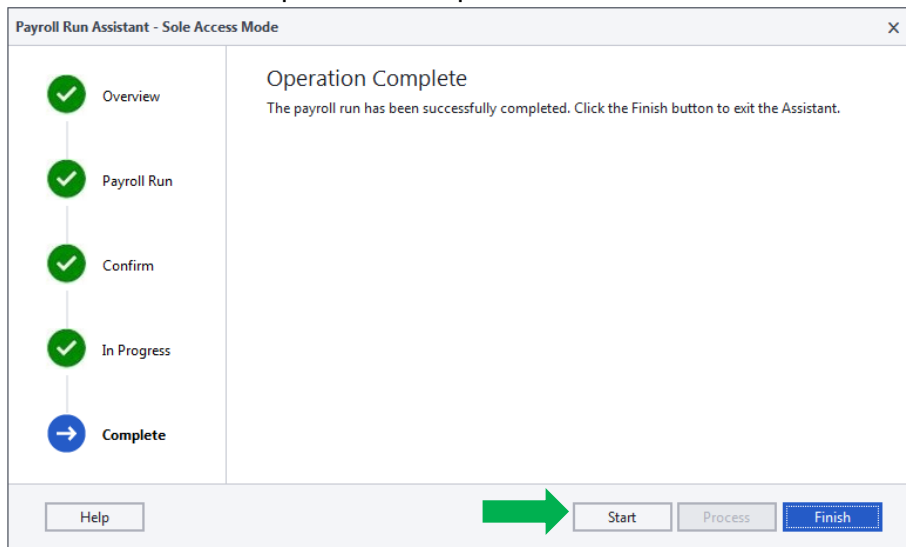
9. **Save** the Masterfile.
10. **Close** the Masterfile
11. Make a backup of your data by going to **File...Backup**
12. Select the directory on your computer where Pastel Payroll must save the backup.

The screenshot shows the 'File Backup - Sole Access Mode' dialog box. The 'Images' section has a checked box for 'Backup Images'. The 'File Name' field contains '_DEMOP(20171218_1132_31032011_20183).zip'. The 'Where To Backup To' dropdown is set to 'c:', and the 'BACKUPS' folder is selected in the file list. The 'Process' button is highlighted.

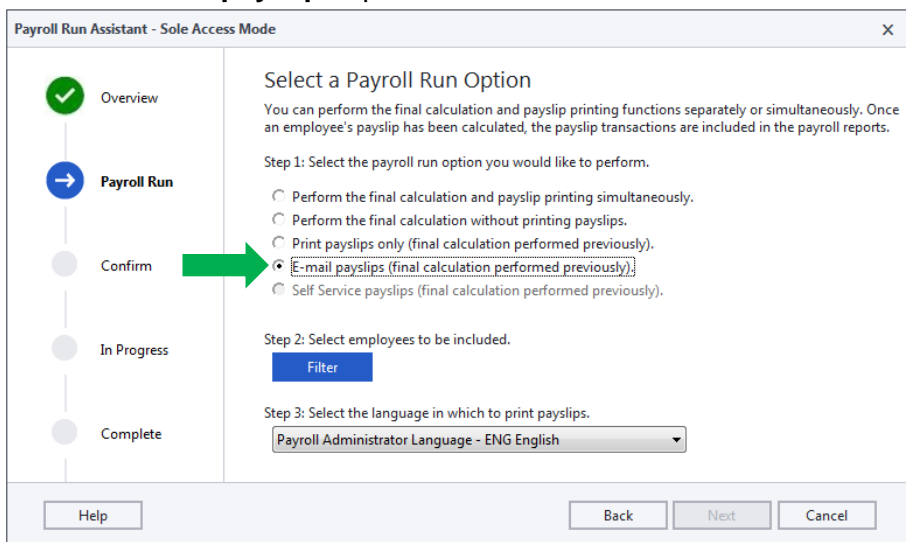
13. Select **Process**.

Note: Do not make Backups in your Company folder, always Backup to a separate folder.

14. Once you have completed the capture of the payslips, you will need to perform a **Payroll Run**.
15. Go to **Process... Payroll Run**
16. Select **Next** on the Payroll Run Overview screen
17. On the Select a Payroll Run Option screen, select to **Perform the final calculation without printing payslips**.
18. Select **Filter**
19. On the Employee Filter, ensure that all the relevant employees are reflecting under **Employees to Process** field.
20. Select **OK** and **Next**
21. Select **Process** on the Confirm Operation screen
22. Select **Start** on the Operation Complete Screen



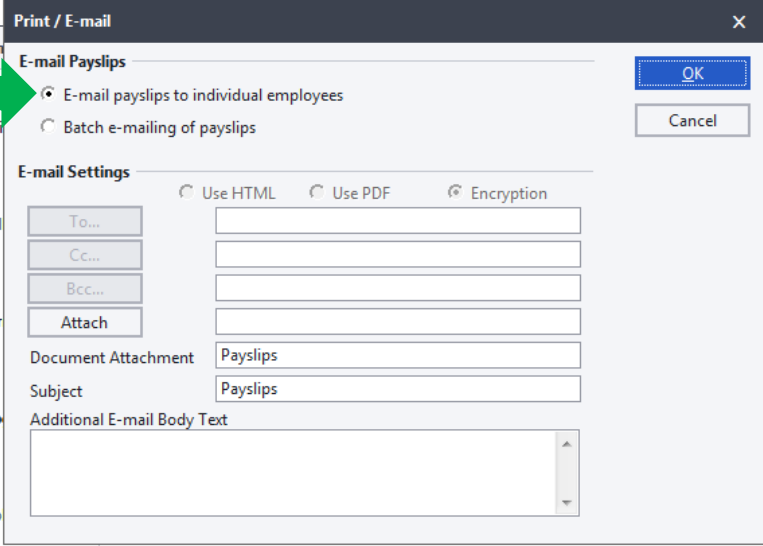
23. Select **Next** on the Payroll Run Overview screen:
24. Select the **Email payslips** option



25. Select **Filter**
26. On the Employee Filter, ensure that all the relevant employees are reflecting under **Employees to Process** field.

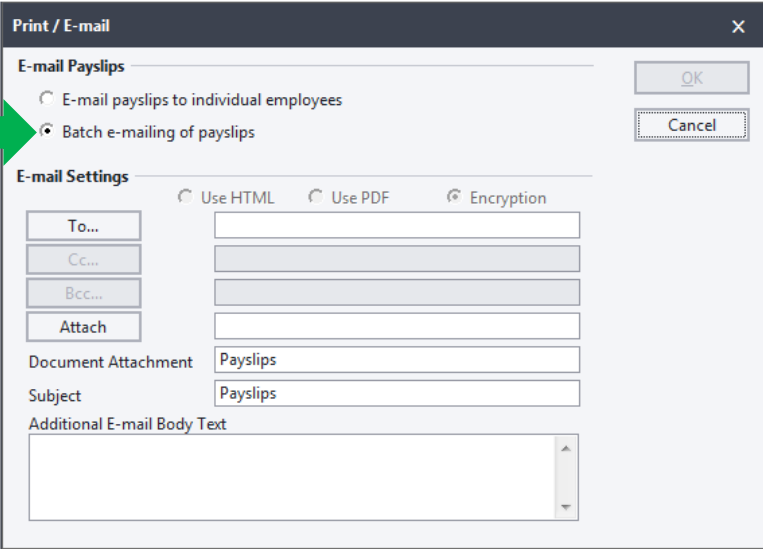
27. Select **OK** and **Next**
28. Select **Process** on the Confirm Operation screen
29. The following screen is displayed:

Note: Select to send the payslips to the individual employees by selecting **Individual**.



The screenshot shows a dialog box titled "Print / E-mail". Under the "E-mail Payslips" section, the radio button for "E-mail payslips to individual employees" is selected, indicated by a green arrow. The "Batch e-mailing of payslips" option is unselected. In the "E-mail Settings" section, "Use HTML" and "Use PDF" are unselected, while "Encryption" is selected. The "To...", "Cc...", and "Bcc..." fields are empty. The "Attach" button is visible. The "Document Attachment" field contains "Payslips", and the "Subject" field also contains "Payslips". There is an empty text area for "Additional E-mail Body Text". "OK" and "Cancel" buttons are in the top right corner.

Note: If you wish to send the payslips to an Administrator for printing, select **Batch**



The screenshot shows the same "Print / E-mail" dialog box, but now the radio button for "Batch e-mailing of payslips" is selected, indicated by a green arrow. The "E-mail payslips to individual employees" option is unselected. All other settings, including "Encryption", "Document Attachment", and "Subject", remain the same as in the previous screenshot.

30. Select **OK**
31. Select **Allow** to allow the Payroll access to your Outlook
32. Within Outlook, you will note the email/ emails in your Outbox.