

Setup Guide - How to Distribute Emails with Direct Deposit Information to Employees using Evermap

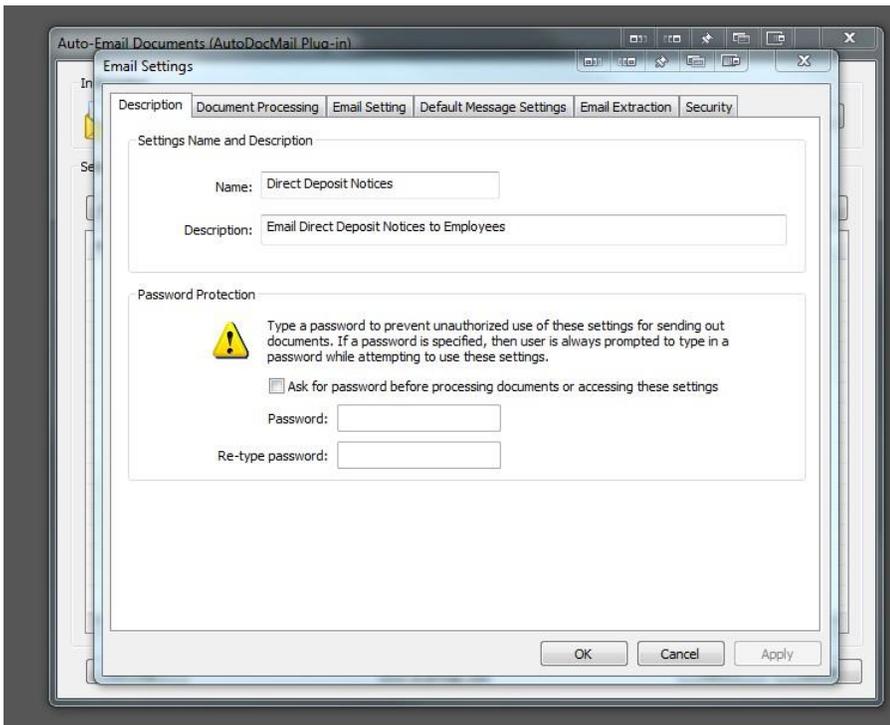
(This is a suggested guide on how to use a 3rd party tool to mass distribute email pdf's to employees with Direct Deposit once payroll is processed in Spectrum)

- Employees should have a home email address and bank account
- Setup separate email address for paycheck stub. Use Notes section in Employee record.
- Modify crystal report to have email address added on report preceded mby "MailTo".
- Make the text color of the email address as white so it doesn't show on the report.
- Purchase Evermap <http://www.evermap.com/autodocmail.asp> (Will require Adobe Std or Professional installed)

ADOBE PLUG-IN SET-UP

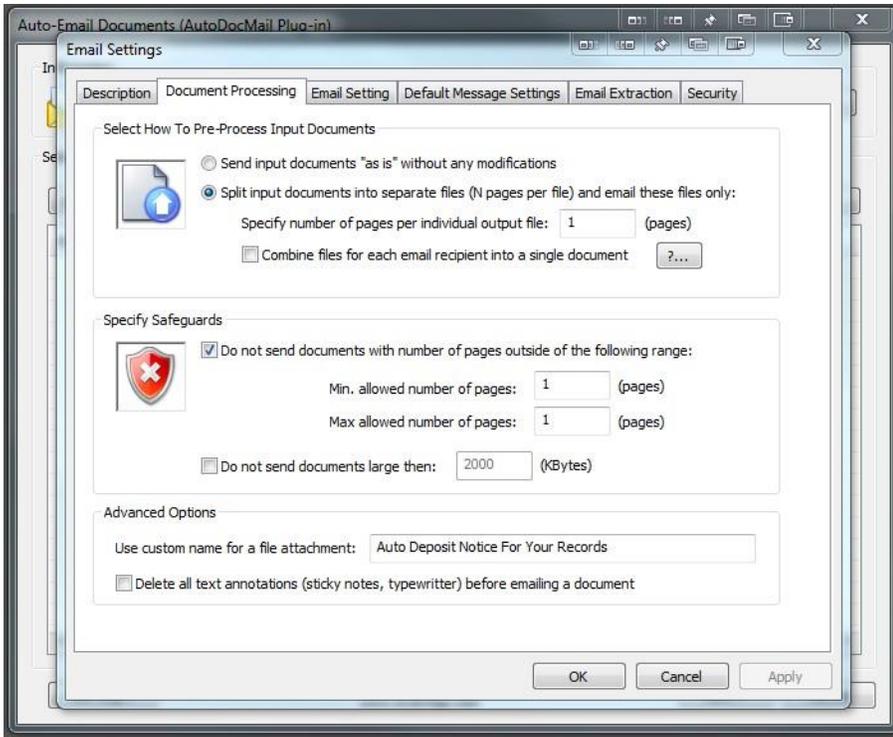
Step # 1.

Give this Workflow a Name & Description:



Step # 2,

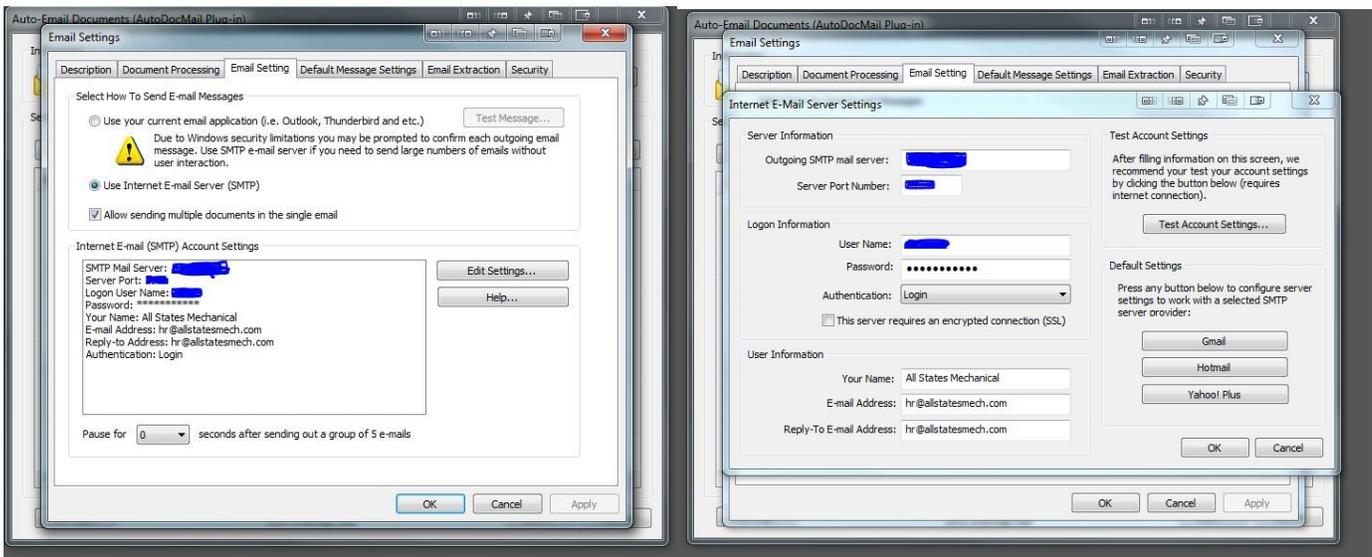
Set up how the documents will be handled and set up a few safety nets.



Step #3,

Set up your email settings.

This will vary depending on how your organization has their email server set up. If you want to keep it simple, you can select the “Use your current email application” and the emails will be sent through your outlook or other default email application, but others can be used such as Gmail, Hotmail and Yahoo.



Step # 4.

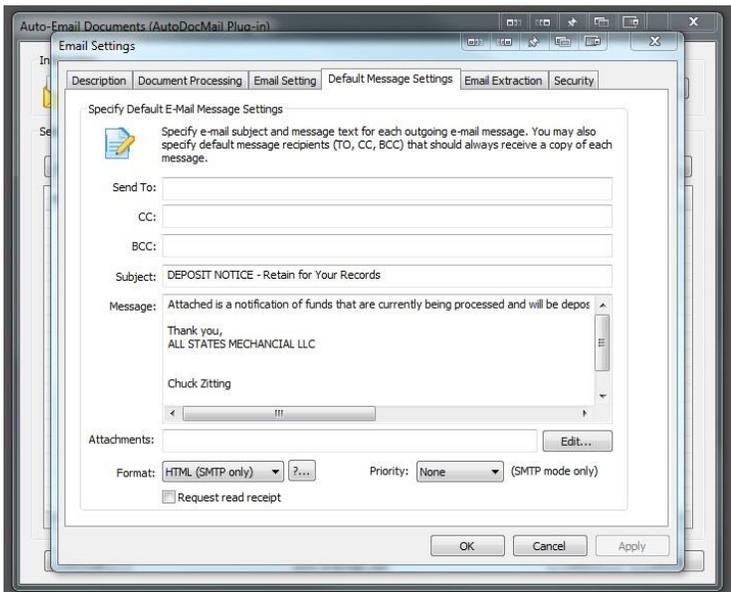
Set up your default email message. Under this tab is the email message that will be sent out with each pay-check stub.

NOTE: Recommend including a link to adobes website so that you don't get calls of people not being able to view the document. Here is the format of the message that I use.

Attached is a notification of funds that are currently being processed and will be deposited into your account. Please allow a minimum of Two (2) business days for processing.

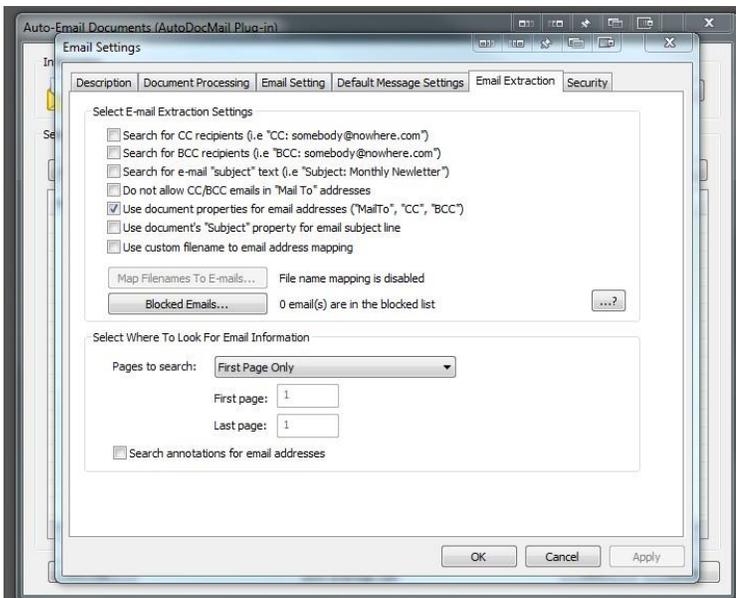
*Thank you,
YOUR COMPANY NAME*

Having problems viewing the attachment? Click on the link to download the latest version of Adobe Reader - <http://get.adobe.com/reader/>



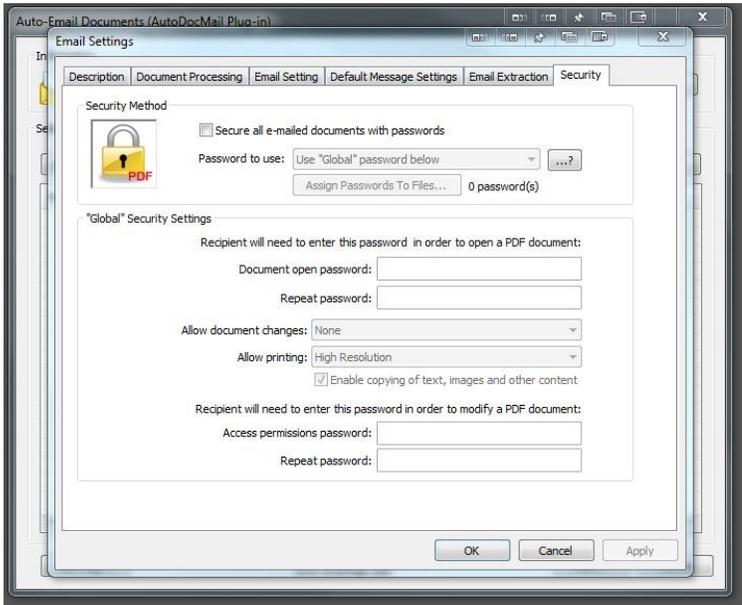
Step #5.

Check the box under the "Email Extraction" tab that says "Use document properties for email addresses" make sure all the other tick boxes are not checked.



Step #6,

Chose if you want to require a password to open the PDF files. This would have to be given out to your employees so that they can view the report.



Setup of add-in is complete.

TEST THOROUGHLY with sample data to ensure that the document is going to the right email address.

RUNNING PAYROLL:

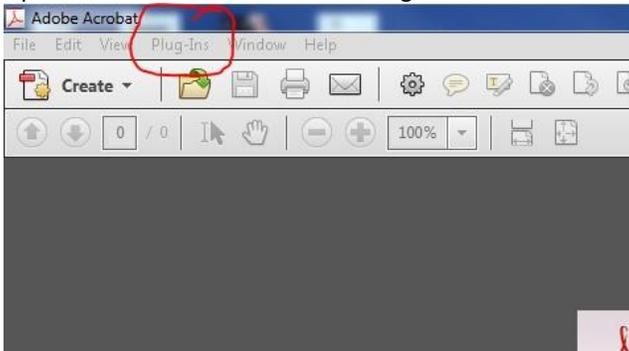
When payroll is run from Spectrum, under “Check Print” instead of printing the file, save the file as a PDF to your desktop or other easily accessible location, obviously, you will need to make sure you are printing from your modified Crystal Report and not the standard one. You can also change the Modified report to be used as the default.

NOTE: Make sure you save an archive copy in case you need to resend a check stub and for other record keeping.

Below is the workflow that we use to send out the paycheck stubs when payroll is run. It only takes a few seconds as you can see.

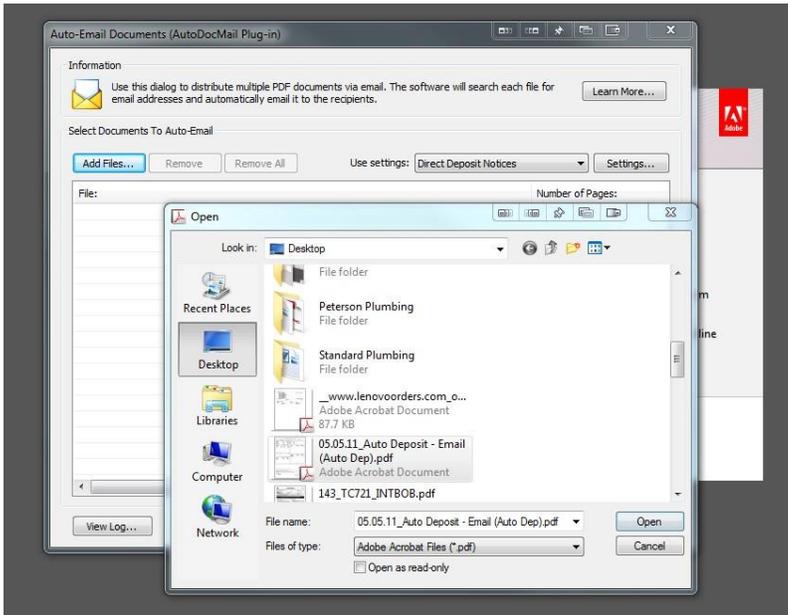
Step #1,

Open Adobe Select and the new “Plug-ins” tab.



Step #2.

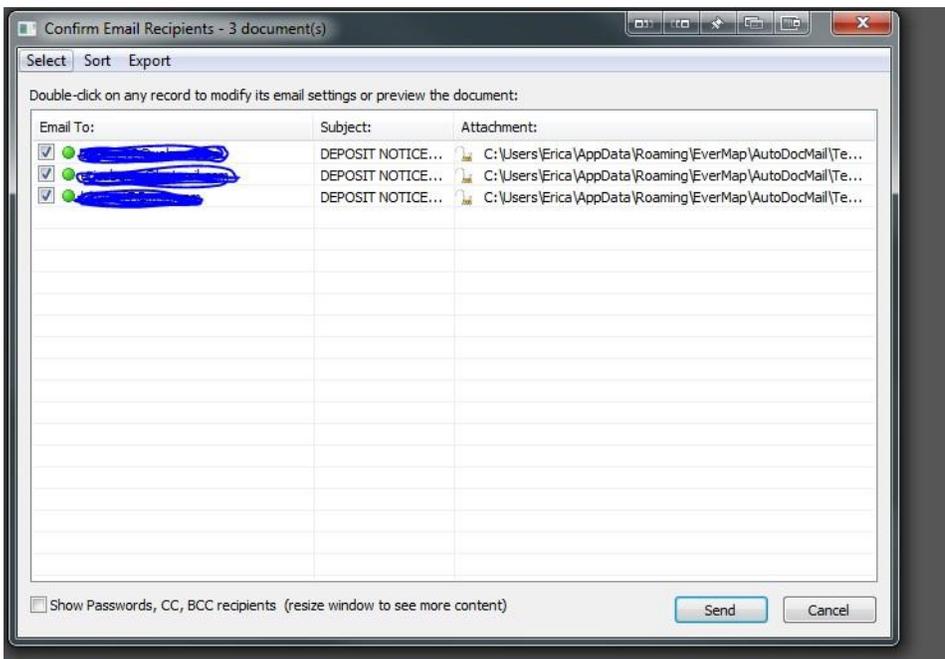
Click on the “Add Files” button and browse to the PDF file that you previously saved on your desktop or other location, Click on the “Open” button to add the file.



Step #3.

After the correct file has been added, click on the “Next” button on the lower right hand corner of the dialog box and the following dialog box will appear. If all is working correctly, the PDF will be separated into individual files and sent to the email address that is showing up on the report.

Make sure there are no red lights to the left of the email addresses as these indicate that you have some type of error. If everything appears in green, you should be good to go. If you are getting a red light, I would check to make sure you have a valid test email address in the employee file and that everything is correct in the PDF generated from your Crystal Report.



Hit the send button if all is clear and a window will shortly pop up confirming that the emails were successfully sent. After the emails are sent, I would recommend deleting the file saved to your desktop to keep it from falling into the wrong hands.

NOTE: If EACH check stub does not contain an email address preceding the word "MailTo" than the check stub will be skipped over and will not be sent. If this is happening un-internally you need to check out the email addresses in the employee file and verify that the Crystal Report is running properly.