



Welcome to the secure-send
step-by-step user guide for
Sage 50 Accounts & Sage 50 Payroll

Version: 0.16

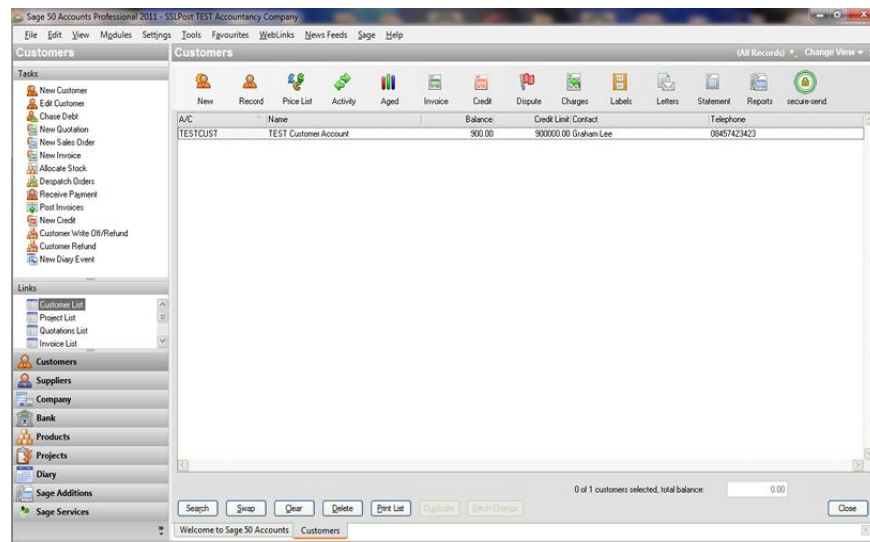
Date: 02/09/2011

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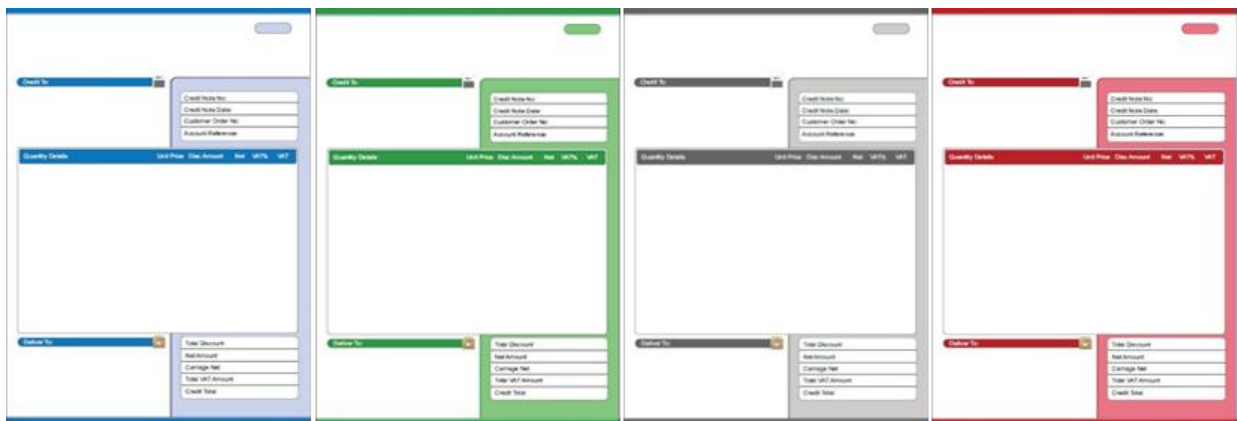
1. User Guide for Sage 50 Accounts

Log into your Sage 50 Accounts product and you should now see the secure-send icon in the top right hand side of the screen.



(a) Setting up document types in secure-send:

Secure-send comes preconfigured with six Sage compatible document types, each with a choice of four colours; Blue, Green, Grey or Red:



Alternatively, if you have your own house style, which accommodates the Sage data output, you can select your own as your default setting.

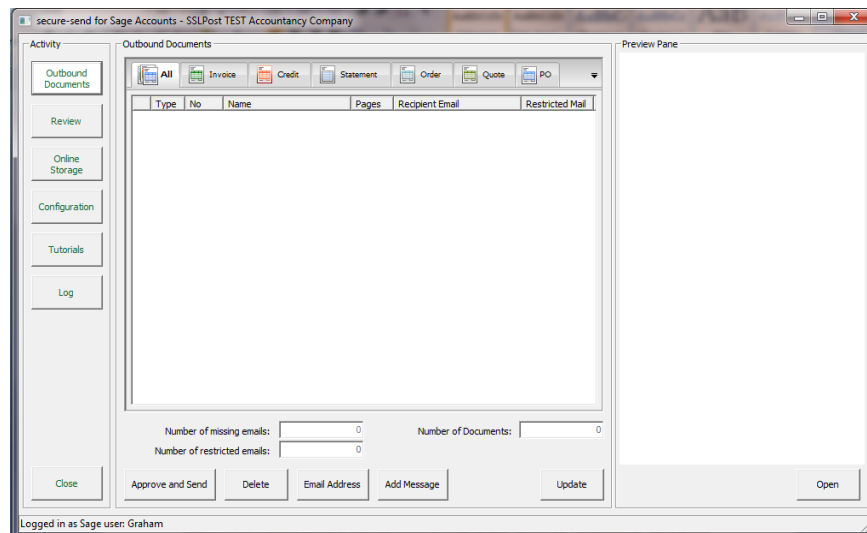
For further information contact your business partner or the SSLPost Customer Services team for further advice.

The six document templates included in secure-send are:

- ✓ **Invoices**
- ✓ **Statements**
- ✓ **Sales Orders**
- ✓ **Credit Notes**
- ✓ **Purchase Order**
- ✓ **Quotes**

To set up default document types you will need to click on the secure-send icon within your Sage 50 Accounts.

This will then prompt you for your “**Sage**” logon name and Password. Once logged in you will be taken to the secure-send dashboard:



Under the **Activity** column on the left hand side click “**Configuration**”.

This will open a window displaying the following information fields.

Document Type: Here you can choose from the drop down menu showing the 6 different document types in secure-send (Credit Notes, Invoices, Statements, Purchase Orders, Sales Orders and Quotes).

Message Subject: This relates to the message subject that will appear in a secure email message that is sent out with the document, currently set to default (which can be overwritten), e.g.

Credit note number <no> has been delivered to you securely via secure-send

The word <no> will be replaced by a document number when documents are sent out by secure-send

e.g. ***“Credit note number 625 has been delivered to you securely via secure-send”***.

Message Body: The message body of the email is currently set to a standard default setting as follows:



The default message body has secure-send branding and is delivered as rich HTML content for optimum presentation. It is possible to change this default branding to include your own company logo and/or bespoke wording. Please contact our Customer Service team to discuss your requirements by Tel: 08456 425 425 or email: customerservice@sslpost.com

Alternatively, you can provide a text based message body in the configuration of the document type.

Attachment Name: The default for the credit note example is:

secure_credit_note_number_<no>

The <no> instruction will pick up the number of the document out of Sage. This too can be changed by simply overwriting the default.

Recipient Password Required: This tick box is currently set so no password is required by the recipient to open any documents that you send to them in an electronic format.

By leaving this tick box blank the documents you have sent will have been delivered by the equivalent of electronic recorded delivery, with the date and time the document was sent being recorded in an 'audit trail'.

By ticking the Recipient Password Required box, the recipient will be required to create their own SSLPost account password (they will automatically receive an introductory welcome email explaining how they create their own password), yet there is no requirement for them to download or install any software.

Add Document Status Buttons: This feature may be turned on or off. Invoice and Credits are set to show the status buttons by default, other document types will not show the status buttons by default.

The Document Status Button allows the recipient of a document to send an electronic message back into the secure-send product indicating whether the document is **CLEARED**, **QUERY** or **PENDING**. This feature is helpful to assist in the early resolution of any disputes that may result in payments being delayed or postponed:

By clicking on one of these buttons an electronic notification will be returned to the sender.

CLEARED
accepted / cleared for payment

QUERY
under query / dispute

PENDING
awaiting approval / authorisation

SSLPost Accountancy Company
 1 Test Street
 Jesmond
 Newcastle upon Tyne
 Tyne and Wear
 NE3 2ER
 VAT Reg No:

Page 1

Invoice To:

SSLPost Test Customer
 1 Test Street
 Jesmond
 Newcastle upon Tyne
 Tyne and Wear
 NE7WYT
 VAT Reg No:

Invoice No:	1
Invoice Date:	26/05/2011
Customer Order No:	TEST
Account Reference:	SSLPOSTT

Quantity Details	Unit Price	Disc Amount	Net	VAT%	VAT
1.00 TEST	3.00	0.00	3.00	0.00	0.00
TEST					
TEST					
Deposit Paid 69.00		Amount Due 434.00			

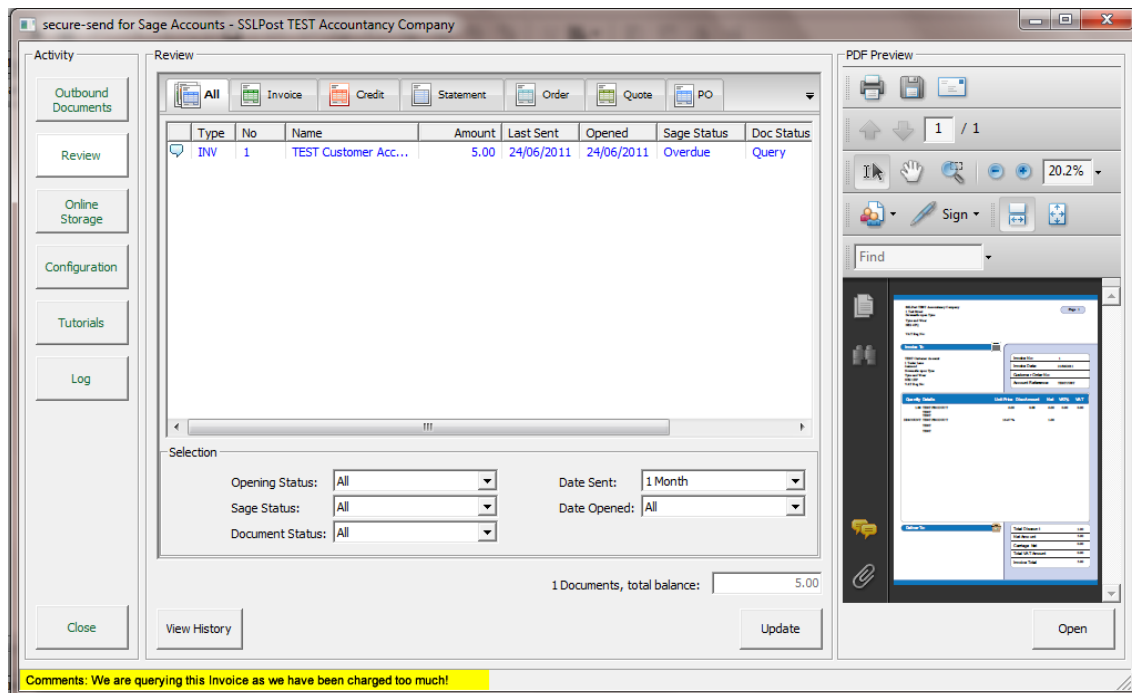
Deliver To:

TEST
 TEST
 TEST
 TEST

JUST THE
JOB

Total Discount	0.00
Net Amount	3.00
Carriage Net	500.00
Total VAT Amount	0.00
Invoice Total	503.00

Once a recipient clicks on one of the buttons, they are prompted to add feedback to explain the status of the document; this feedback is displayed at the foot of the REVIEW Page of the secure-send dashboard:



Important Note

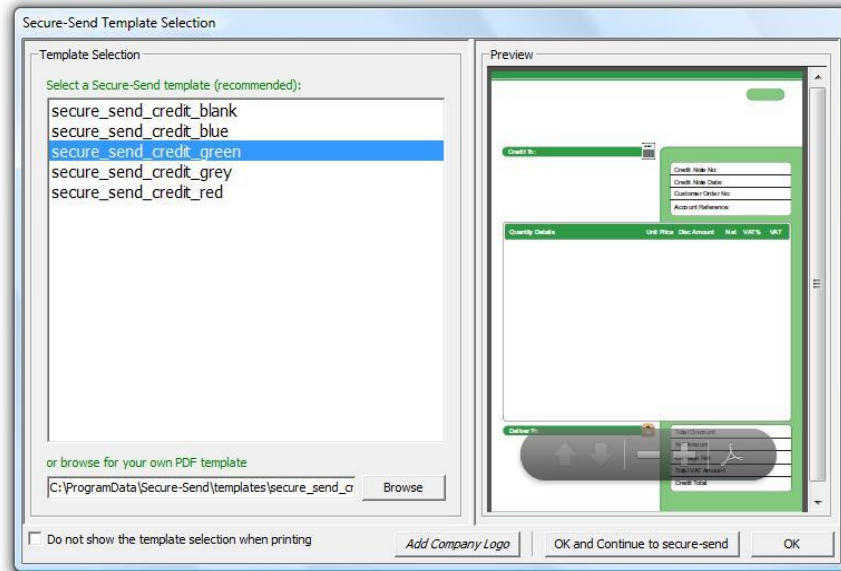
If you do make changes to any of the fields described above you must save these settings by clicking the update button in the bottom right of the screen. Failure to do so will result in any of the changes you have made not being saved.

We would recommend that you spend some time talking to your partner about how this feature can be used and introduced to your customers.

(b) Selecting templates when setting up document types:

By choosing the select template button whilst in Configuration section of the secure-send dashboard, you are able to select the colour of the document you wish to associate with each of the 6 document styles.

Select the colour document you wish to set as your default by clicking/highlighting it and you will see it previewed in the right hand display panel.

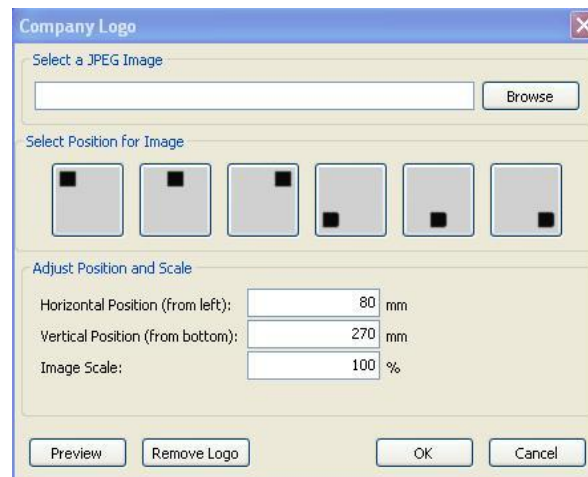


(c) Adding your company logo:

At this stage you can add a company logo to the PDF template by clicking “**Add Company Logo**”.

We recommend a JPG image of about 100 x 100 pixels. However our solution will deal with any image size. On selecting the logo using the Browse function you should select the location on the document you want the logo to appear. There are 6 default positions to choose from.

After selecting a default position you can make fine adjustments to the logo placement by updating the horizontal and vertical positions. The image size can be adjusted with the “Image Scale” option which defaults to 100% - which is full size:



Click **'Preview'** and this will open a new window displaying the company logo in the relevant position on the document you have selected.

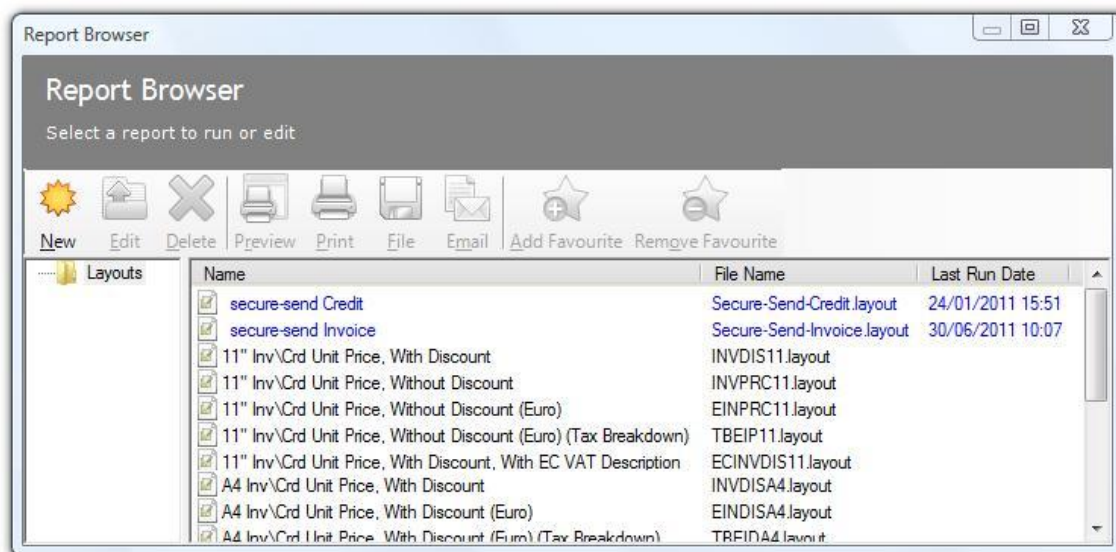
Finally click **"OK"** and secure-send will remember these settings on each subsequent occasion you select this document type.

We recommend that you spend some time setting up each of the 6 document types by following the steps above so that in future sending electronic documents becomes a simple and easy process.

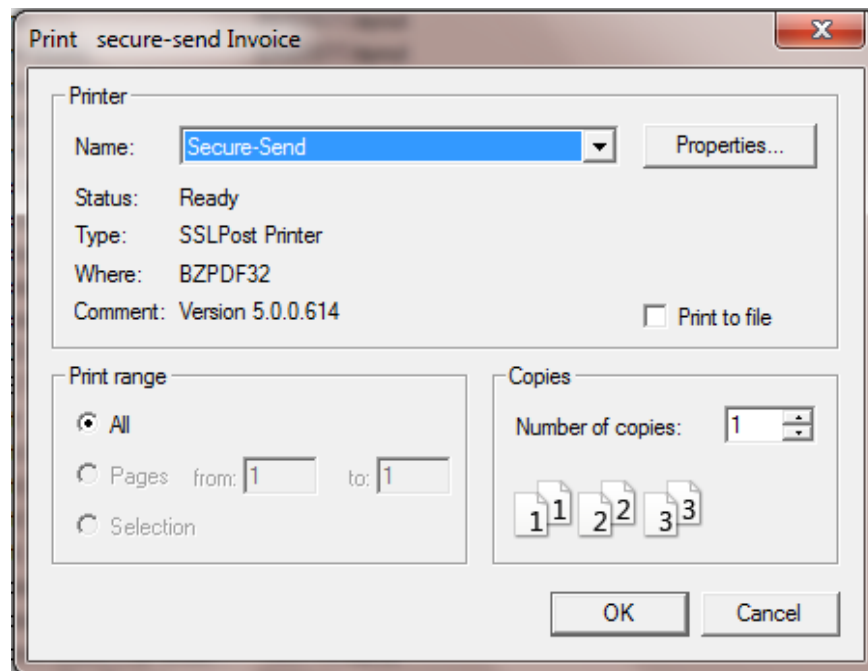
(d) Sending documents from Sage 50 via secure-send:

Sending a document from Sage is simple. To do this, follow these simple steps;

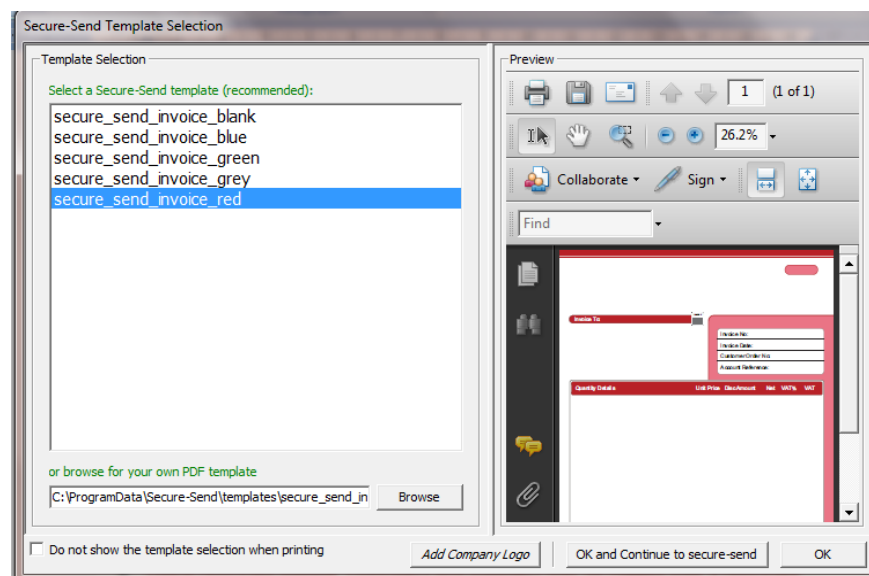
- ✓ Ensure that you have set up your documents correctly as described previously.
- ✓ Select the document or documents you want to send, for example highlight an invoice from the invoice list.
- ✓ Select **"Print"** from the menu toolbar.
- ✓ In Report Browser select the document style (Under Invoicing you could choose between a Credit and an Invoice). There are some new layouts that now appear at the top of the list for use with secure-send:



- ✓ Now press the **"Print"** button from the Report Browser tool bar and the secure-send Virtual Printer should be selected, press **"OK"**:

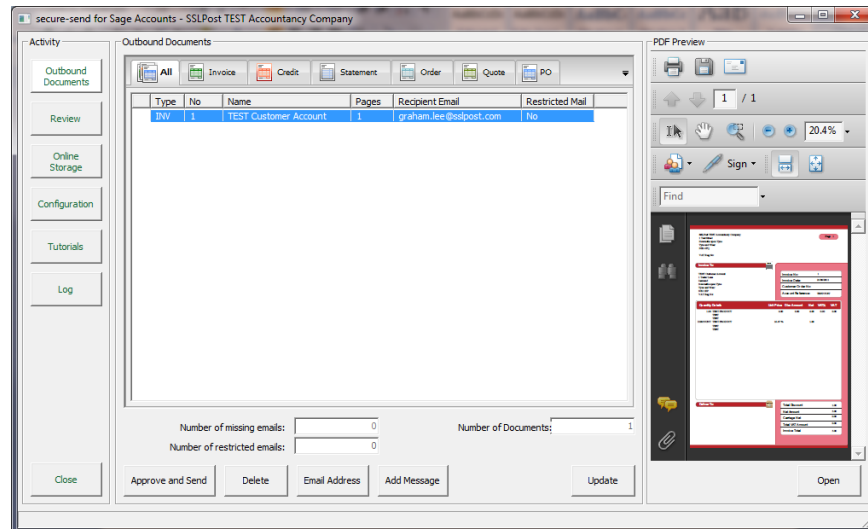


- ✓ Using the secure-send template selection, you can now choose the colour of your document (Assuming all the default settings are pre determined and appropriate) click “OK” and Continue to secure-send. You can prevent this box from appearing again (for this document type) by ticking the checkbox at the bottom-left, entitled “Do not show the template selection when printing”.



- ✓ You will now be taken to the secure-send dashboard; within the **Outbound Documents** section you will see all unsent documents.

In order to **Preview** any document highlight the document and it will appear in the PDF Preview window to the right:



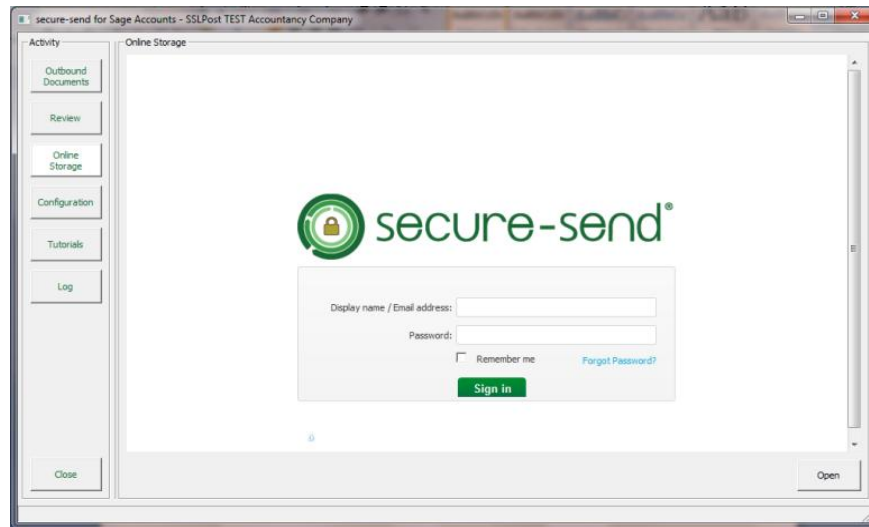
- ✓ Check the email address is ok and if necessary you can change the recipient email address by clicking the **"Email Address"** button and amending it from here.
- ✓ Check restricted mailing. Customers and suppliers may be flagged with a restricted mail setting in the Sage Accounts application. As a precaution, secure-send will not allow you to send documents to these accounts unless the restricted mail setting is cleared.

The restrict mail setting can be found in Sage under the **"Credit Control"** tab of the customer record.

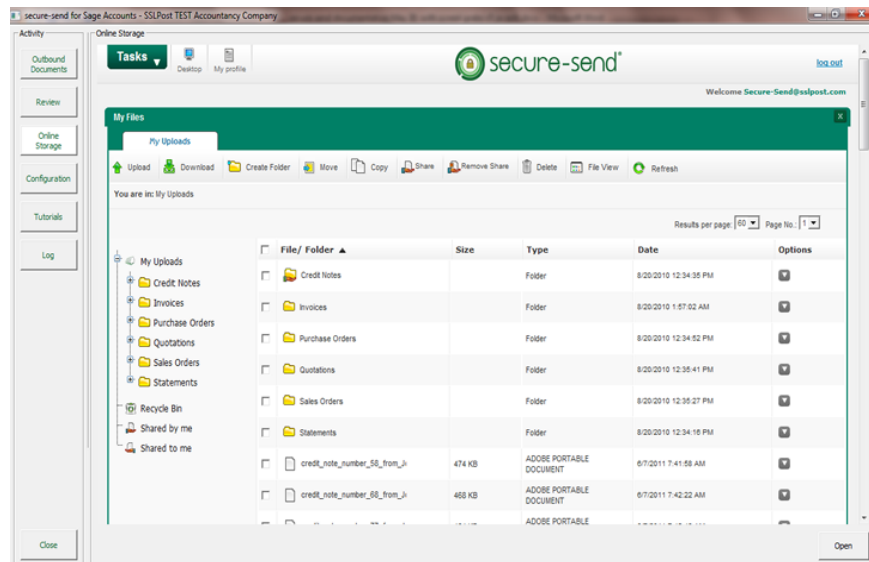
- ✓ To send all documents in the Outbound Documents Window press **"Approve and Send"**

(e) Online storage:

Any document sent via secure-send will be stored for reference. You can log into the storage feature by clicking **"Online Storage"** in the secure-send dashboard and entering in your SSLPost Account details:



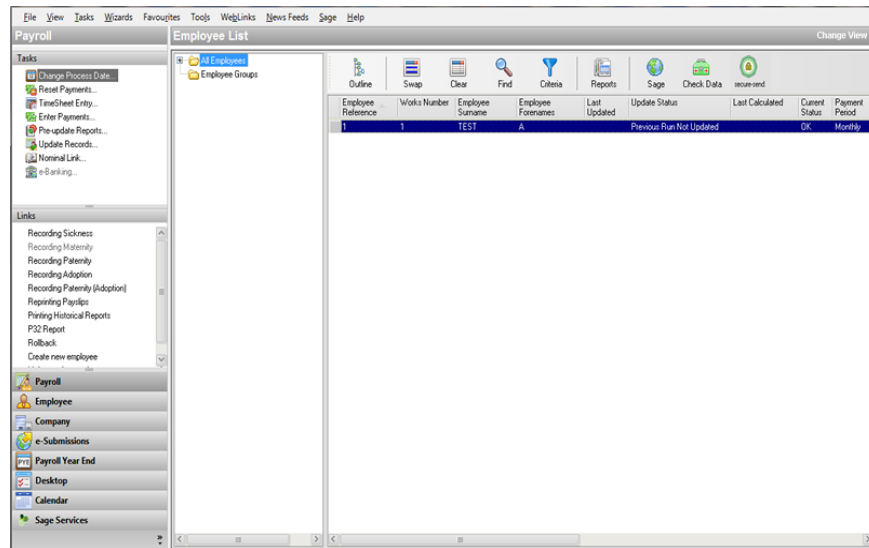
Once into the Storage facility you have the ability to view any past documents:



Documents from Sage 50 are auto routed into folders for Invoices, Statements, and Orders etc.

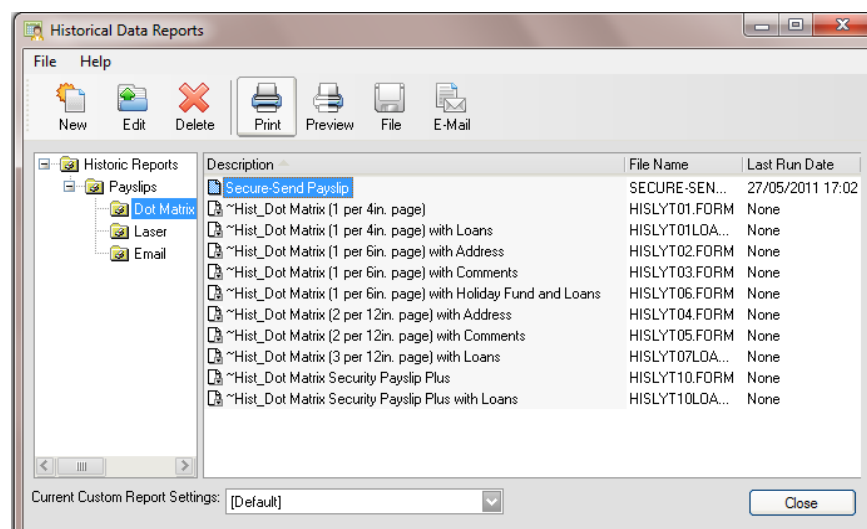
2. User Guide for Sage 50 Payroll

Log into your Sage 50 Payroll product and you should now see the secure-send icon in the top right hand side of the screen.

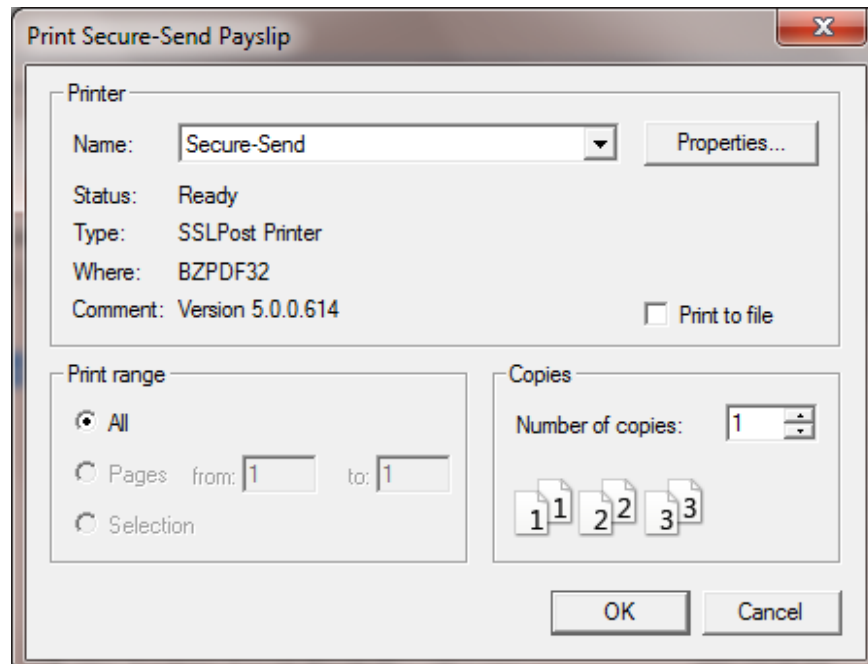


(a) Printing an e-payslip:

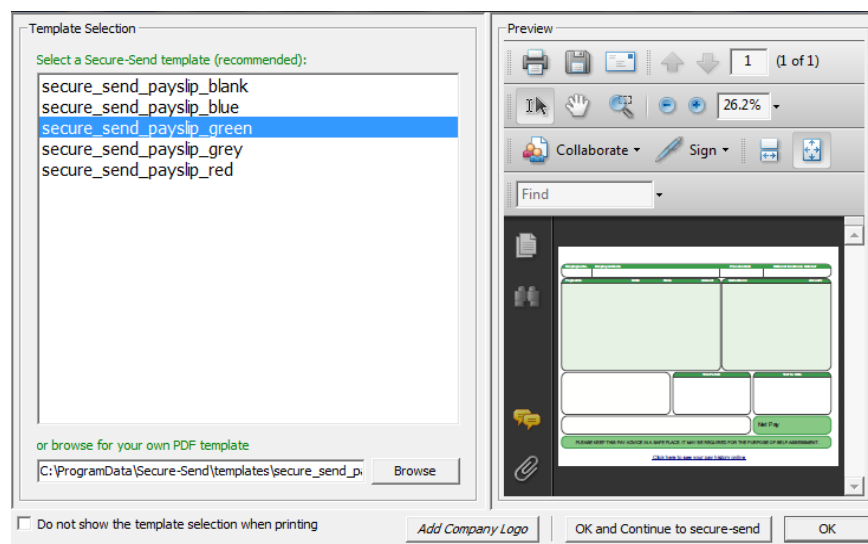
You firstly need to click on “**Reprinting Payslips**” on the left hand side of your Sage 50 Payroll screen. A Historical Data box now appears and you need to highlight “**Dot Matrix**” underneath the “**Payslips**” folder on the left hand side - Highlight “**secure-send Payslip**” at the top of the list and click the “**Print**” button:



A new screen will appear where you will see that the Printer selected will already be “**secure-send**”, so all you need to do is click the “**OK**” button:

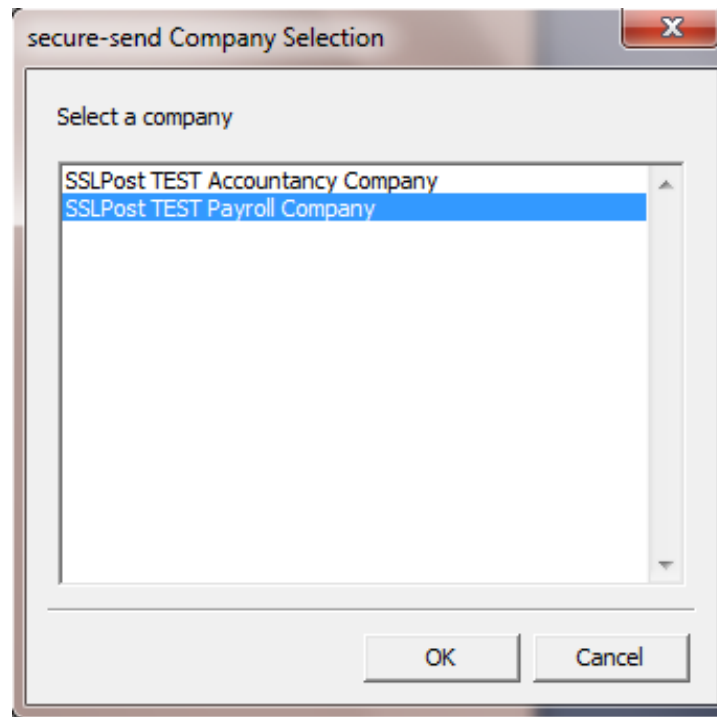


As mentioned in the Sage 50 Accounts section previously, the secure-send Template Selection screen will appear. By choosing the relevant template whilst in this section, you are able to select the colour of the e-payslip you wish to send:

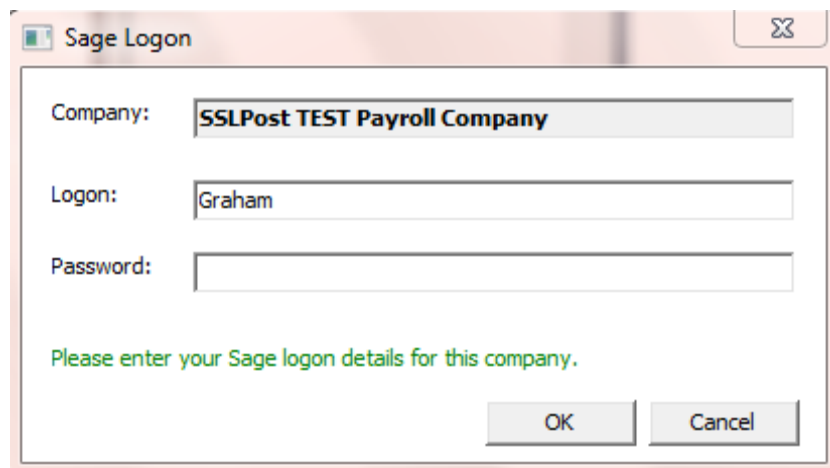


Now you can click “**OK and Continue to secure-send**”.

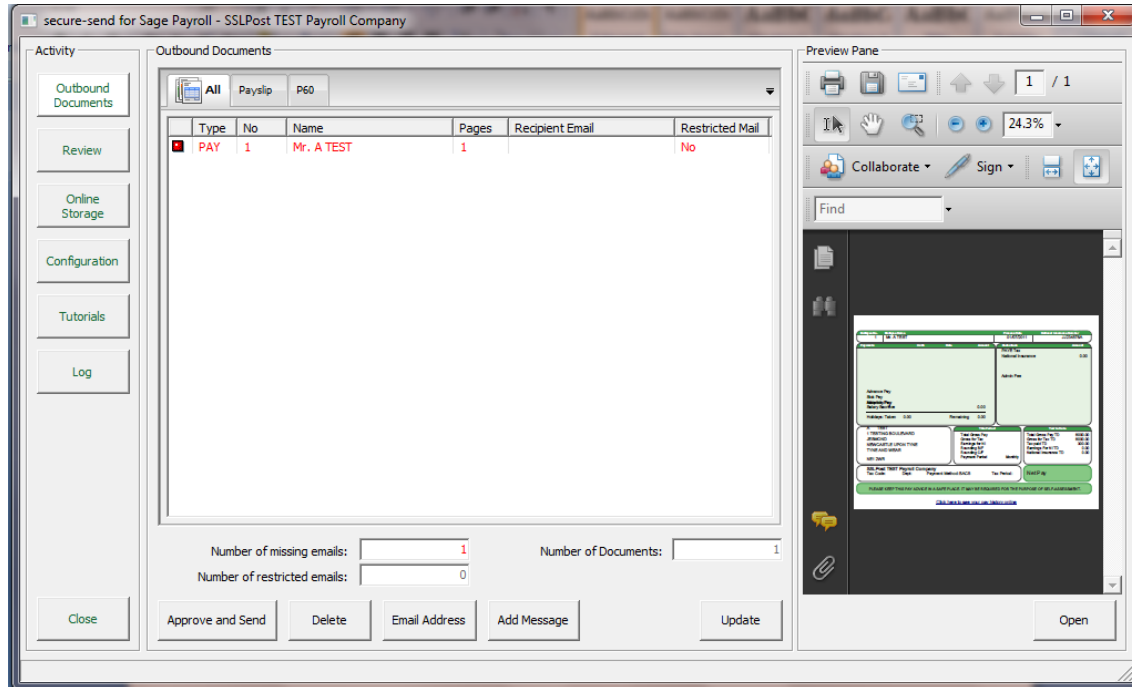
You will be prompted with a secure-send Company Selection screen. You will need to select the relevant company you are sending your e-payslips from and then click “**OK**”:



Now you will need to log into secure-send with your relevant Username and password that you created:

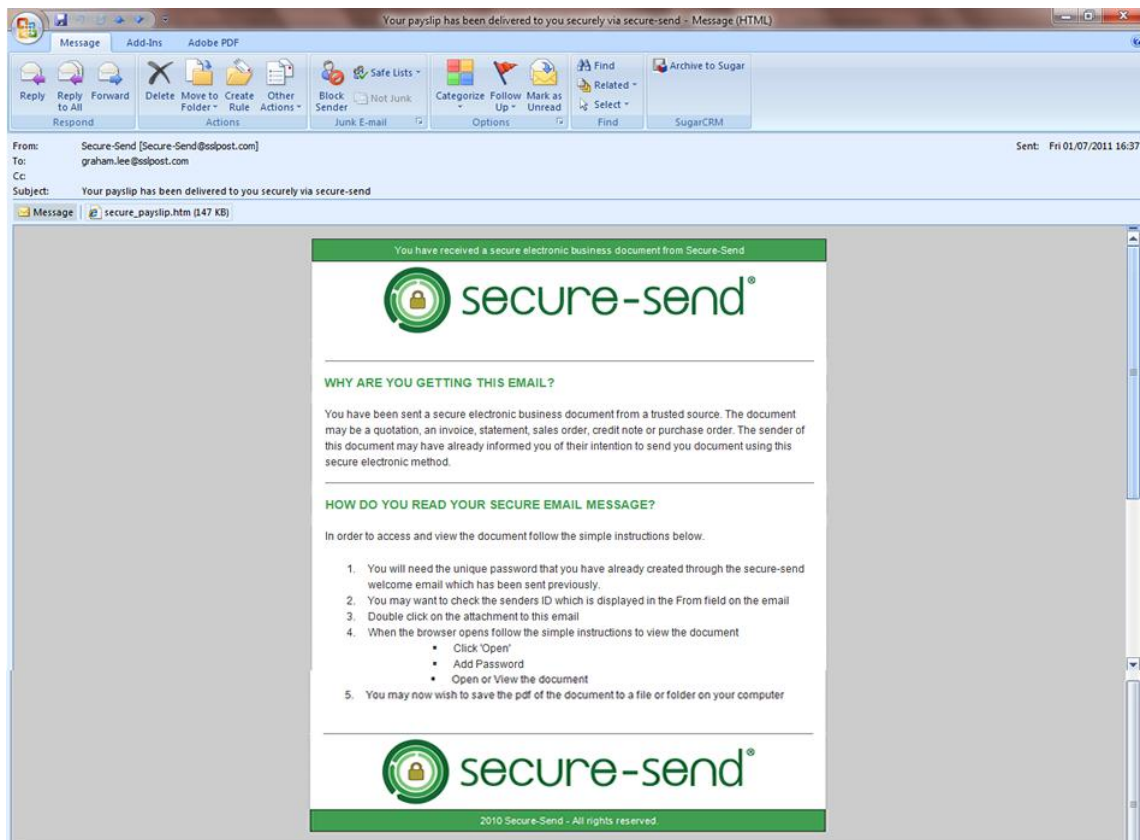


You will now be taken to the secure-send dashboard, where you will see the e-payslip waiting to be sent in Outbound Documents:

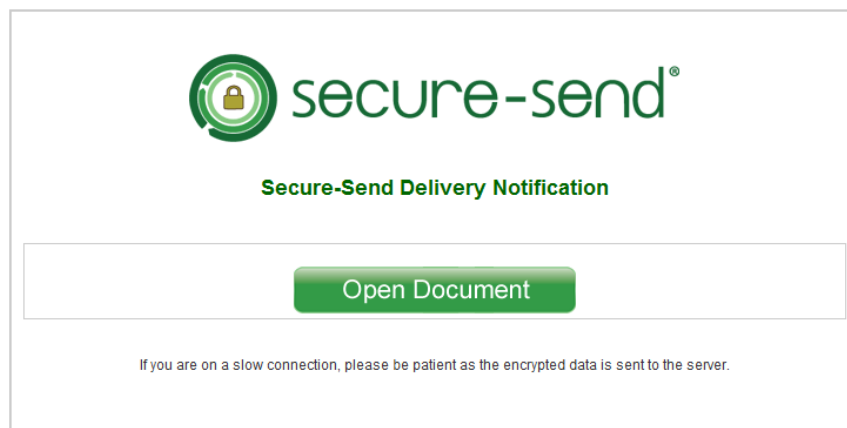


As you can see in the above screenshot, the e-payslip is highlighted in red. This means there is no email address entered for our system to acknowledge. This can be rectified by clicking on the **“Email Address”** button and manually entering the email address of the recipient you wish to send the e-payslip too.

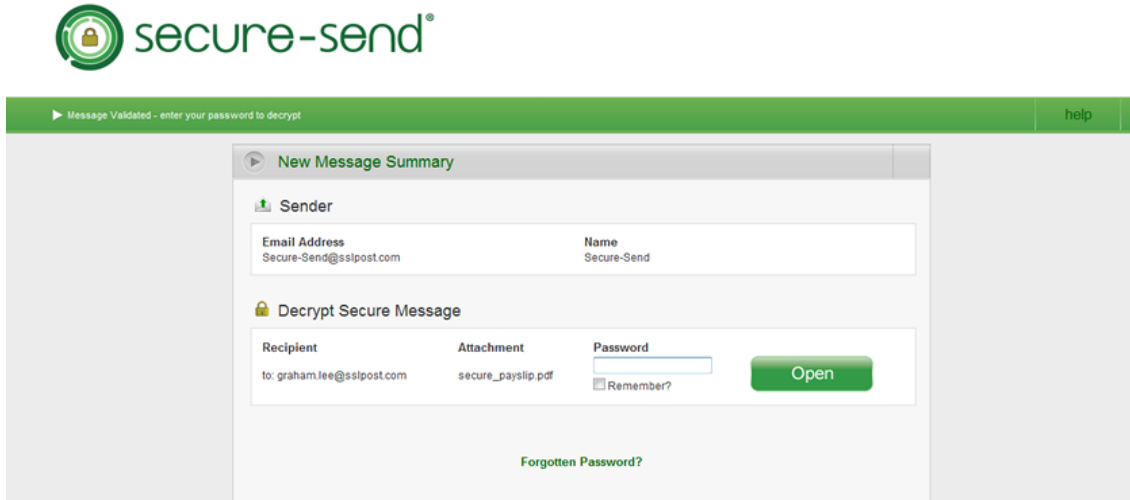
When you are ready, you can now click **“Approve and Send”** and the recipient should then receive the below html email:



If the recipient then clicks on the .htm attachment of the email, this will open up the below screen in his web browser. They will then need to click the **“Open Document”** button:



They will now need to enter in their SSLPost password and click the “Open” button:



Message Validated - enter your password to decrypt help

New Message Summary

Sender

Email Address	Name
Secure-Send@sslpost.com	Secure-Send

Decrypt Secure Message

Recipient	Attachment	Password	<input type="button" value="Open"/>
to: graham.lee@sslpost.com	secure_pay slip.pdf	<input type="text"/>	

Remember?

[Forgotten Password?](#)

If they have Adobe Reader installed, then they will then be presented with their e-payslip:

Employee No.	Employee Name	Process Date	National Insurance Number
1	Mr. A TEST	01/07/2011	JJ234576A

Payments	Units	Rate	Amount	Deductions	Amount
Advance Pay				PAYE Tax	
Sick Pay				National Insurance	0.00
Maternity Pay				Admin Fee	
Salary Sacrifice			0.00		
Holidays: Taken	0.00	Remaining	0.00		

A TEST 1 TESTING BOULEVARD JESMOND NEWCASTLE UPON TYNE TYNE AND WEAR NE1 2WR	This Period Total Gross Pay Gross for Tax Earnings for NI Rounding B/F Rounding C/F Payment Period Monthly	Year to Date Total Gross Pay TD 8000.00 Gross for Tax TD 8000.00 Tax paid TD 300.00 Earnings For NI TD 0.00 National Insurance TD 0.00
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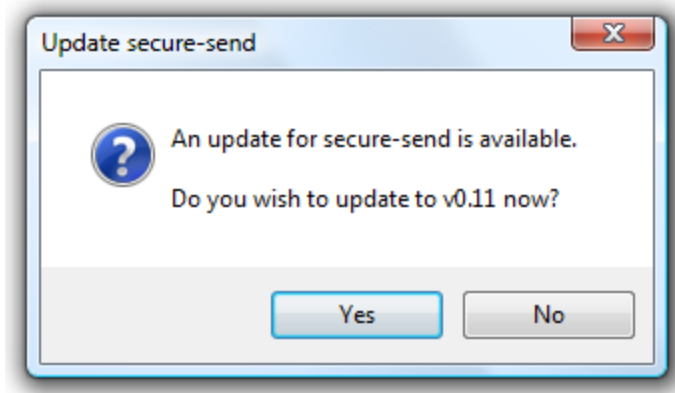
SSLPost TEST Payroll Company
 Tax Code: Dept: Payment Method: BACS Tax Period:

PLEASE KEEP THIS PAY ADVICE IN A SAFE PLACE. IT MAY BE REQUIRED FOR THE PURPOSE OF SELF-ASSESSMENT.

[Click here to see your pay history online](#)

3. Updating secure-send

Secure-send will update automatically when new versions are released. This will ensure that you can benefit from any new functionality that is introduced or any new template designs that are made available.



In order to accept the update, please select “Yes”.

4. secure-send FAQs for Sage 50

Can I send more than one document at once?

Yes, secure-send lets you send entire print runs as a bulk job, as long as you have the email address set up for the contact. Alternatively, you can send documents one at a time until you are confident with the system.

Can I add additional security?

In secure-send you can send documents by the equivalent of electronic recorded delivery (by unchecking the password required box in Configuration) otherwise check this box to ensure your documents are sent by secure email where your recipient will require a password to open the document.

How do I know if someone has opened a document?

You can see this in the Review window on secure-send. Here you will be able to see when the document was first sent and when it was opened.

What is the view history button view for?

This is to allow you to see when an individual document was last sent and also monitor any subsequent sending history.

What do my customers or my suppliers see when they receive a document?

They receive either an html or plain email with an attachment containing a link to the electronic document you have sent. This will be either a secure email or the equivalent of electronic recorded delivery.

How can I inform my customers or suppliers that I am going to send them electronic documents?

We'd suggest you communicate with them by normal email explaining that you intend to use secure-send alongside your Sage package to send electronic documentation. Take the opportunity to develop your customer and supplier relationships further by introducing them to this innovative technology.

Can I quickly see which of my documents have been sent and opened?

In the Review Window you can re order the presentation of documents by clicking on the headers such as Type, Number, Name, Amount, Last Sent, Opened, Sage Status, and Document Status. You can filter the list to show only those documents that have been successfully opened by the recipient.

5. Contact Us

For any queries or advice, please contact our Customer Services team on **08456 425 425** or email them on customerservice@sslpost.com between the hours of Monday to Friday 9am – 5pm.