

Acclaim - How to setup E-Delivery

Steps 1- Employee Setup

Prior to opening a new payroll period perform the following steps.

- Go to Setup -> Employees then double click on an employee's name
- From here click on the 'Miscellaneous' tab, select "Receive Payslips by Email" and then enter the employees email address and a unique password. The employee will be prompted for the password entered here when they attempt to open the PDF document containing their paystub. The password must be 4 to 10 characters in length and you may consider using the last 6 digits of the employees SIN number to make it easy to remember.
- Click save and then repeat the above process for each employee that would like to receive their paystub by email.

Step 2- Generate to Database OR Export to Zip File

After you have completed your payroll but prior to posting perform the following steps.

- From the home screen click payroll, process payroll, print and then cheques & payslips
- Click the "Layout" tab and then select the "Cheques & Payslips (8 ½ by 11")" option. PDF Slip is active Only for this selection
- Click the "Payslips Export Options" tab and enter a "Master Password" **This is not mandatory..** This password should be kept confidential as it will allow whoever has it to open all employee pay stubs.
- Export Method – Here you can either select 'Generate to Database' OR 'Export to Zip File'. if you select 'Export to Zip File' then specify path by clicking on browse button and enter file name. **(Note down filename and location you require this information in next step for E-delivery)**
- Ensure select the Use charset from drop down list :

The screenshot shows the 'Cheques & Payslips' dialog box with the 'Payslip Export Options' tab selected. The 'PDF File Settings' section includes a 'Master Password' text field, an 'Encrypt Password' checkbox (checked), and a 'Use charset' dropdown menu set to 'EASTEUROPE_CHARSET'. The 'Method' section has two radio buttons: 'Generate to Database' (selected) and 'Export to Zip File'. The bottom toolbar contains buttons for 'PDF Slips', 'Setup' (highlighted with a blue border), 'Sample', 'Preview', 'Print', 'Close', and 'Help'.

If you select 'Generate to Database' then software will remember it

- Go to tab Parameters and enter 'Starting Cheque/Voucher #' and click on '**Preview**', verify paystub and click on 'Close'. Now click on button 'PDF Slips' and this will create a payslip package

Step 3 – E-Delivery

In the previous step you have create the Zip file 'Export to Zip file' or Database 'Generate to database', which has the pay slips of each employee but it has not been sent out yet. You can choose to send this

- Go to Utilities -> eDelivery and select e-mail connection method 'Connect using my Microsoft Outlook' if Microsoft Outlook install on computer **Or** you can select 'Connect directly to an e-mail server (SMTP)
- Select source of PDF file – In step 2 if you selected export method 'Generate to Database' then select 'Generated pay stubs in database' or select 'Delivery zip file' and specify location from zip file
- Click on button 'Next'
- If you have selected 'Connect using My Microsoft Outlook' then enter E-mail subject and E-mail body and click on button 'Save settings' and click on button 'Send a test email' to verify it.
- If you have selected 'Connect directly to an e-mail server (SMTP)' then enter require information (you can obtain this information from Technician or from IT dept). Now click on button 'Save settings' and then click on button 'send a test email' to verify it.
- Click on button 'Next'
- You can click on button 'Select all' to select all employees or you can manual select it by click on box just beside emp Number
- Click on button 'Send Emails' to send out an email

- **"Host name /Server Address"**: The host or IP address of your SMTP server (e.g. smtp.mycompany.com)
- **"Server Port"**: Depending on your company security, this number can be different.
- **"Sender's Name"**: The name of the person who will be sending your emails. This can be a real person in your company, but can also be something generic, such as your company name.
- **"Sender's Email address"**: The email of which will be sending the emails on behalf of. Similar to the sender's name, this can be the email address of one particular person (e.g. johndoe@paymatesoftware.com), or something more generic (e.g. info@paymatesoftware.com). Ensure that the email address is a valid email address using your identified server address and port above.
- **"Mail server's user name"**: This field is required if **"Use TLS"** is unchecked. This will be your actual email address. Ensure that this email address is a valid email address using your identified server address and port above.
- **"Mail server's password"**: This field is required if **"Use TLS"** is unchecked. This will be the password to your email address.
- **"Use TLS"**: Transport Layer Security; cryptographic protocols designed to provide communications security over a computer network. Ask your IT department if this should be checked.

1. Click the **"Save settings"** button to save your changes.

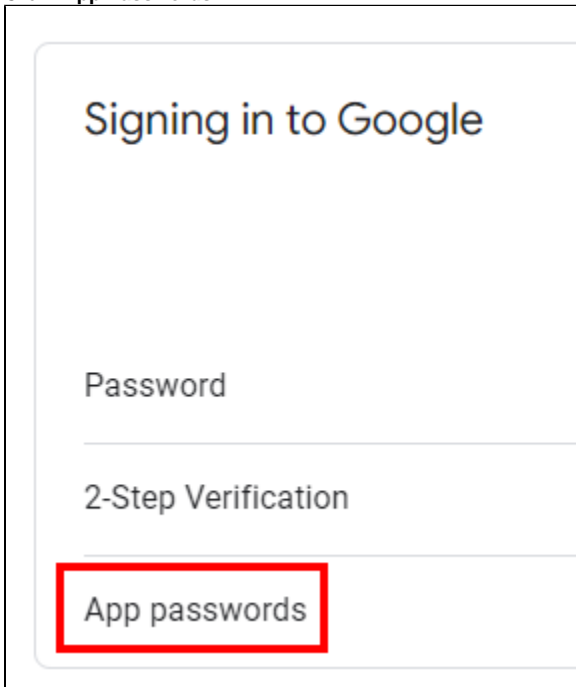
NOTE: We recommend you click the **"Send Test Email"** button prior to sending real emails to ensure that your connection and email settings are set up properly. After sending a test email, ensure that you received the test email before going live with your email setup.

Gmail: How can I create an app password that lets me set up my emails?

If you are using Gmail, google considers most applications as non-trusted apps. You can create and set up an app password that lets you bypass Google's security settings to allow Acclaim to send emails on your behalf. **Note: You'll need to have enabled two-step verification first.**

1. Go to your Google account settings.
2. Navigate to Security.
3. Scroll down until you see the *Signing into Google* section.

4. Click "**App Passwords**".



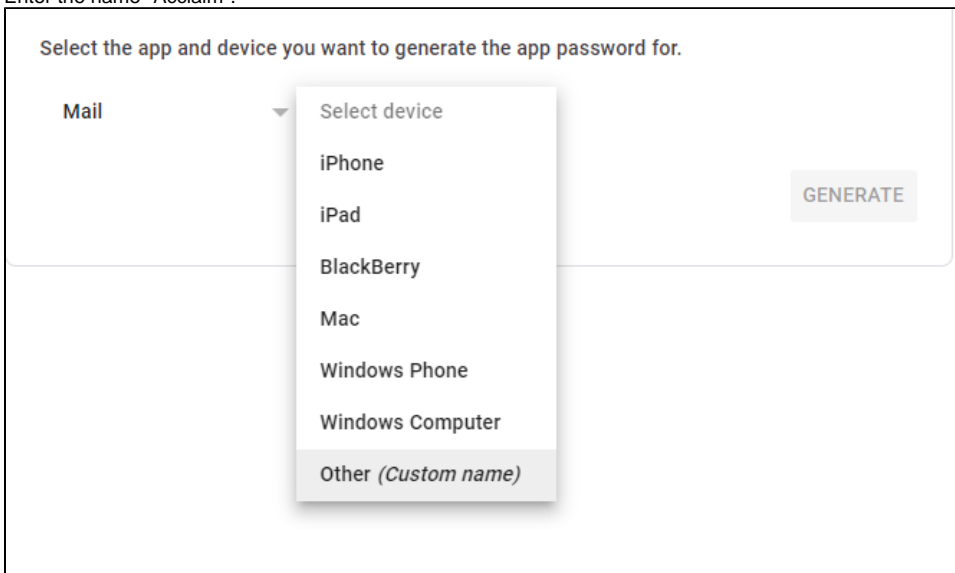
Signing in to Google

Password

2-Step Verification

App passwords

5. In "Select App", select '**Mail**'.
6. In "Select Device", select '**Other (Custom Name)**'.
7. Enter the name "Acclaim".



Select the app and device you want to generate the app password for.

Mail

Select device

- iPhone
- iPad
- BlackBerry
- Mac
- Windows Phone
- Windows Computer
- Other (Custom name)

GENERATE

8. Click on "**Generate**". An app password will be generated for you. Use this password in Acclaim as the "Password".

Microsoft Office 365: How can I set up my emails if I use multi-factor authentication?

If you are using Microsoft Office 365, it is possible that you have multi-factor authentication enabled. If so, below are additional steps that you will need to take to allow access to your email address in order to send emails out. If you're not sure, please verify with your IT person or whomever is in charge of your emails.

1. Sign into the Microsoft 365 Admin Center. If you do not have access to the Admin Center, navigate to <https://admin.protection.outlook.com/ecp/> and skip to step 4.
2. In Microsoft 365, select "**Admin**".
3. Click "**Exchange**" to go to the Exchange Admin Center (EAC).

4. In EAC, navigate to Mail Flow > Connectors.

Status ↑	Name
Off	Inbound to China
Off	SJC Test
<input type="radio"/> Off	Test Inbound Partner Connector
Off	partner test
Off	O365_To_SignatureContoso
Off	Test_Route_To_Internet

5. Click "+ Add a Connector". A wizard to add a connector will open.

New connector

Specify your mail flow scenario, and we'll let you know what to do next.

Connection from

☐ Office 365

☒ Your organization's email server

☐ Partner organization

Connection to

☒ Office 365

6. For "Connection From", select "**Your organization's email server**".
7. Click "**Next**".
8. Enter a "Connector Name" for this connection.
9. Click "**Next**".
10. Select "By verifying that the subject name on the certificate that the sending server uses to authenticate with Office 365 matches the domain entered in the text box below (recommended)".

11. Enter your email provider's domain name in the text box. For example, Paymate uses "info@[paymatesoftware.com](mailto:info@paymatesoftware.com)", so Paymate's domain name will be "paymatesoftware.com". If you use Eastlink or Sasktel, your domain name will be Eastlink or Sasktel respectively.

The screenshot shows the 'Add a connector' wizard in Office 365. On the left, a progress bar indicates the steps: 'New connector' (checked), 'Name' (checked), 'Authenticating sent email' (current step, highlighted with a blue dot), and 'Review connector' (unchecked). The main content area is titled 'Authenticating sent email'. It asks 'How should Office 365 identify email from your email server?' and provides two options. The first option, 'By verifying that the subject name on the certificate that the sending server uses to authenticate with Office 365 matches the domain entered in the text box below (recommended)', is selected with a radio button. Below this option is a text box containing 'youremaildomain.com'. The second option, 'By verifying that the IP address of the sending server matches one of the following IP addresses, which belong exclusively to your organization', is not selected.

12. Click "Create Connector".

Helpful Tips

Refer to your email service provider's forums or support for helpful articles.

- Microsoft Outlook: <https://support.office.com/en-us/article/pop-and-imap-email-settings-for-outlook-8361e398-8af4-4e97-b147-6c6c4ac95353>
- Gmail: <https://support.google.com/mail/answer/7104828?hl=en>