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# MYOB IMS Payroll

## Sending Emails

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myob

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# Introduction

MYOB IMS Payroll includes the ability to send the following documents via email from within the application:

- The registration form, when registering a new company.
- Employee payslips, when processing a pay.

In both cases, you must set up details of the SMTP mail server that will be used to send emails from MYOB IMS Payroll.

## Setting up IMS Payroll for Emailing

### SMTP Setup

Before you can email documents, a link must be created between IMS Payroll and your Internet Service Provider. This is done by filling in the SMTP Mail Profile screen that can be opened by selecting **SMTP Setup** from the Tools menu.

**Note:** If you try to email documents without setting up SMTP details, the SMTP Mail Profile screen appears automatically so you can enter the settings.

This screen provides information about your provider and the email account you are sending the documents through.

This information allows the provider to confirm you are who you say you are and have the authority to use their email service.

The screenshot shows a web-based form titled "E-mail - SMTP Mail Profile v1.23". The form is organized into two main columns. The left column contains several input fields and checkboxes: "SMTP Host" (text box), "Port" (text box with "25" entered), "User Name" (text box), "Password" (text box), "Senders E-Mail" (text box), "CC E-Mail" (text box), "Show Report" (checkbox, checked), "Requires Secure Connection? (SSL/TLS)" (checkbox, unchecked), "Authenticate?" (checkbox, unchecked), "Retain Password?" (checkbox, unchecked), and "Email Hosted via Office 365?" (checkbox, unchecked). The right column contains a vertical stack of buttons: "Send" (with a checkmark icon), "Close" (with a red X icon), "Test Settings" (with a gear icon), "Help" (with a question mark icon), "Recipient Report" (with a document icon), and "Show Log" (with a document icon).

Consult with your IT professional or your Internet Service Provider to confirm the information that should go in these fields

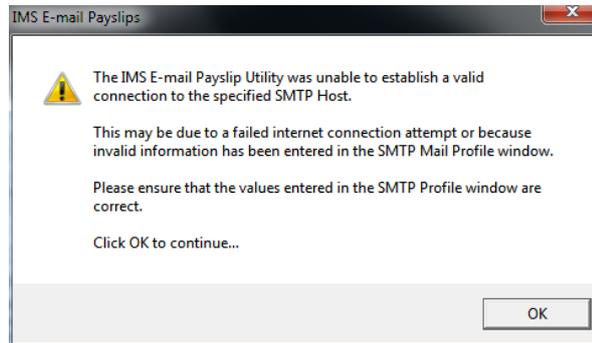
Available fields are:

- **SMTP Host** The address of your SMTP Host mail server (e.g. smtp.host.co.nz). This can be represented by the domain name of the server or by its corresponding IP address.
- **Port** The port on your email server that messages should be sent to. port 25 creates an unsecured connection. Either port 465 or 587 are used when your provider requires a secure connection. As payslips contain personal information it is strongly recommended a secured port be used.
- **Requires Secure Connection? (SSL/TLS)** Tick this box if the SMTP Host mail server specified above requires a secure encrypted connection, either Port 465 or 587 (using SSL or TLS security protocols).
- **User Name** The login name you use to access your email server.
- **Authenticate?** should be selected if the mail server (SMTP Host) requires a valid username and password before the sending emails can be performed or if the SMTP host requires a secure connection.
- **Password** available only after **Authenticate?** Has been ticked.
- **Retain Password?** Tick this box to avoid having to enter the password every time emails are to be sent.
- **Senders E-Mail** The email address that should appear in the "From:" position of the recipients payslip message.
- **CC E-Mail** The E-Mail address of the recipient who should receive copies of all E-Mail payslips that have been sent in the current session. Leave this field blank if this feature is not required.
- **Show Report** This checkbox will only display when emailing payslips - not for emailing Registration Forms. Untick this box if the 'Recipient Listing' is not required to be generated immediately after all E-Mail payslips have been sent. This report lists the names, email addresses and the status of the 'send' for all employees who have been sent an email payslip in the current session. The report will be generated into a preview window immediately after the last payslip has been processed (sent). You can deselect this option prior to clicking on the SEND button if the report is not required.
- **Email Hosted via Office 365?** Office 365 has a limit of 30 emails sent in one minute as a means to help combat some email spamming methods. If you send more than 30 emails in one session you should tick this box to force a two second delay between each email.

When you have completed the setup requirements on this screen, you can click the **Test Settings** button to check the settings. This will create a dummy message and send it to the address entered in the **Senders E-Mail** field.

## Error Messages

If an internet connection cannot be detected or established, or if the SMTP server connection information provided is invalid, the following message will be displayed:



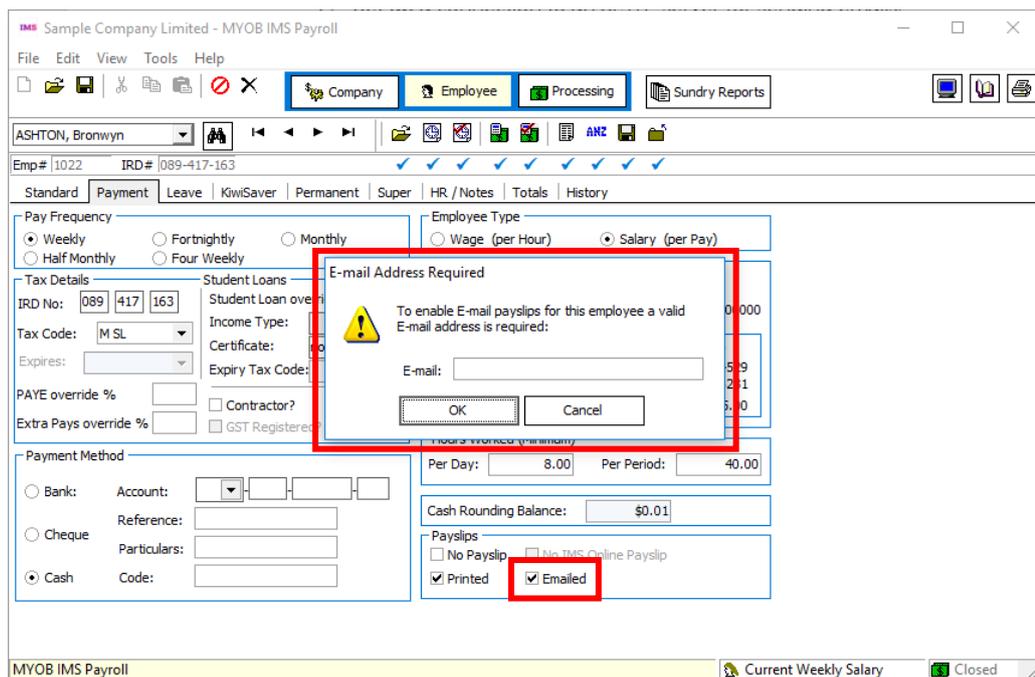
If this message appears, click the **OK** button and the SMTP Profile window will be displayed again. If the failure was due to an unavailable internet connection, establish a connection manually first then click **OK**. Otherwise, if the failure was due to invalid profile information, correct the error and proceed.

You are now ready to send your payslips.

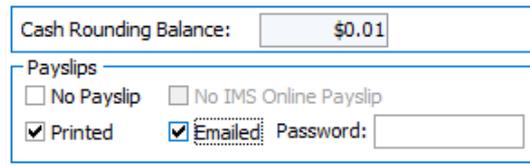
**Note:** It is strongly recommended that you take a copy of your SMTP page, noting what your password is as well as there are occasions when the screen may need to be refreshed.

## Employee Setup

To email payslips, your employees should have a valid email address on their Standard tab. Go to the Payment tab and tick the **Emailed** option. If the employee does not already have an email address on the Standard tab, a window will appear asking for the e-mail address. Enter a valid address and click **OK**.



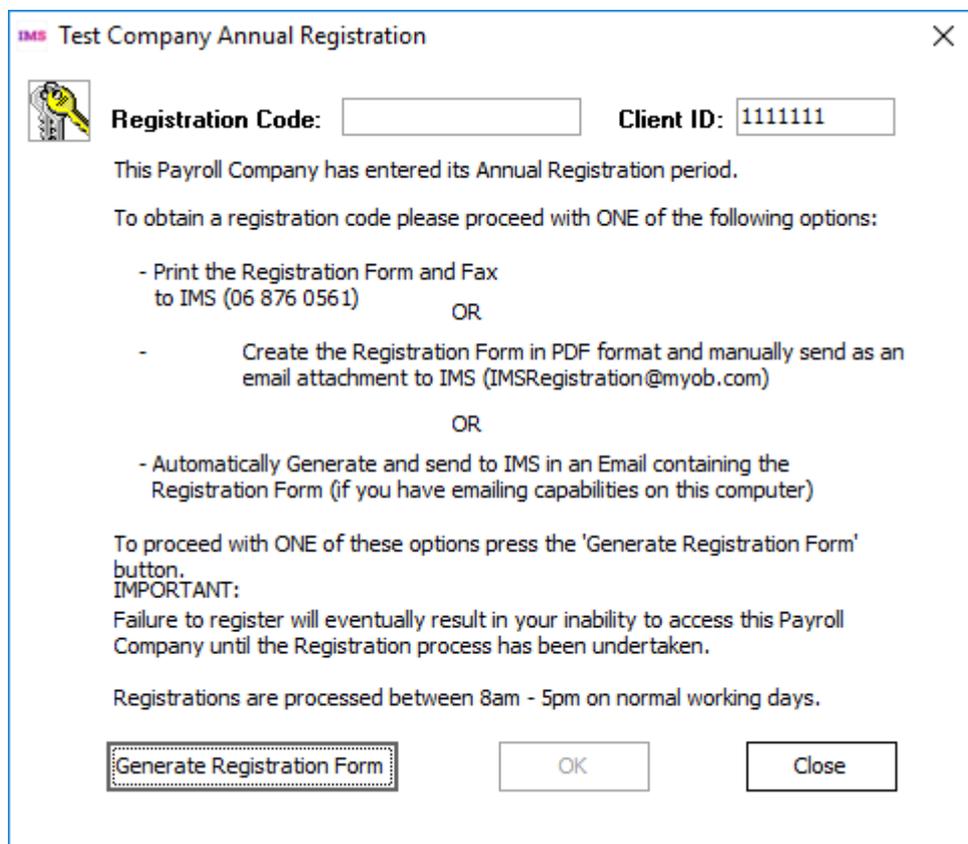
After the **Emailed** option is ticked, a **Password** field becomes available next to it. If you want to place additional security on the payslip, enter a password protect the payslip into this field.



**Note:** If you want to print a copy as well, leave the **Printed** option ticked. Untick this option if you don't want to print a payslip.

## Emailing the Registration Form

Once you create a new company, the Registration window will appear on opening the company or running a pay:



This window lets you generate a registration form to be sent to MYOB—you can email the form directly from the Registration window. Click **Generate Registration Form** to enter your customer details and create the registration form.

**IMS Test Company Annual Registration** ✕

**Customer Profile:**

Customer Name: \*  Client ID: 1111111

Postal Address: \*   
  
 Street Address: \*

Business Type: \*

Telephone: \*  Mobile:

Fax Number:

Contact Name: \*  Operator Name:

Email Address: \*

**\* required fields**

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**Note:** This profile is in regards to the Company or organisation registered with MYOB IMS Payroll as the valid LICENCE holder for the MYOB IMS Payroll Application.  
Once this profile has been completed it will be available for future maintenance and registration processing.

Once you have entered all of the required details, click Email to create the registration form an email it to MYOB automatically.

If SMTP settings haven't been entered, the SMTP Mail Profile window appears.

**Note:** If you don't want to enter SMTP settings at this time, return to the Registration window and click **Create PDF** instead. This will create the registration form as a PDF document, which you can email to MYOB using your preferred email client.

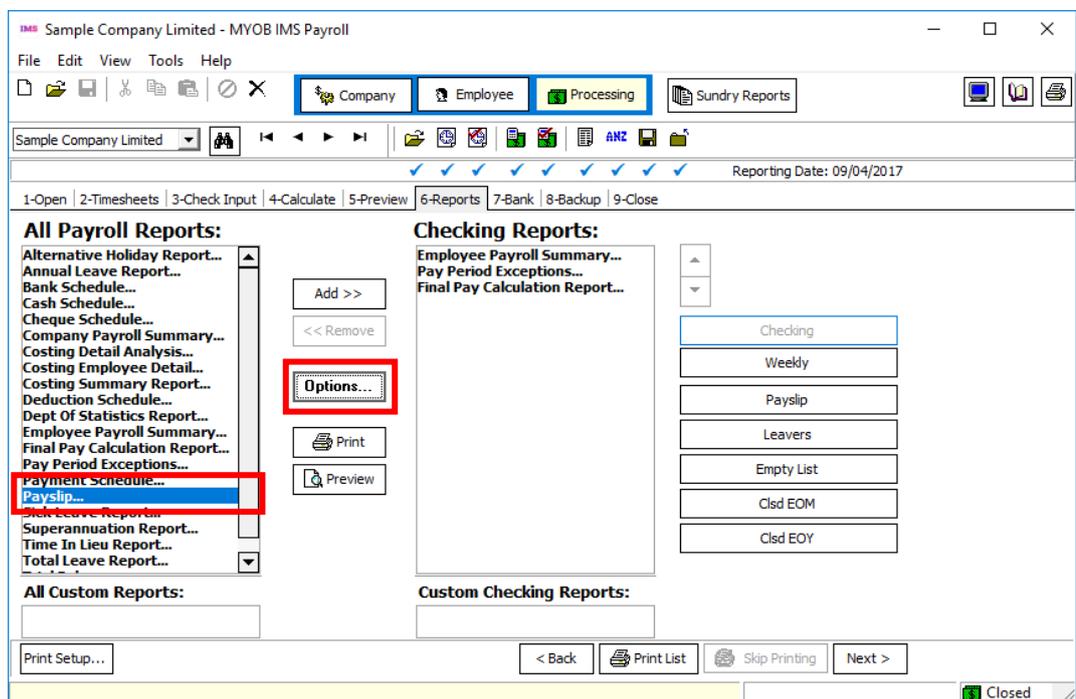
# Emailing Employee Payslips

The process for emailing payslips is:

1. Set up a connection to an SMTP server for sending emails.
2. Set up employee records for emailed payslips.
3. Generate payslips for emailing as part of a pay run.
4. Send the generated payslips to employees.

## Generating Email Payslips

Process your pay as normal. When you get to Step 6-Reports, select the Payslip report under the All Payroll Reports list on the left of the screen, then click **Options**.



On the Payslip – Report Options window, select all Figures you want to show. To email payslips, tick the **E-mail Payslips?** option.

The screenshot shows the 'Payslip - Report Options' dialog box with the following settings:

- Sort Order:**  Employee Name,  Employee Number,  Pay Point then Employee Name,  Pay Point then Employee Number
- Print Range:**  All,  Range: From: Pay Point: [dropdown], Employee: [dropdown]; To: Pay Point: [dropdown], Employee: [dropdown]
- Show Figures for:**
  - Annual Leave Outstanding?  Time in Lieu?  KiwiSaver Employer Contribution?
  - Annual Leave Accrued?  Apprentice Hours?
  - Annual Leave Balance?  Outstanding Deduction Balances?  Company Super Employer Contribution?
  - AL Cash Up Balance?
  - Sick Leave Outstanding?
  - DV Leave Balance?
  - Alternative Holidays?
- Payslip Type:**  Standard,  A4,  IMS Laser,  A4 IMS Laser,  Impact
- Printing Options:**
  - Window Envelope?  Only if Net Different?  Tax Code?
  - E-mail Payslips?  Bank Account Details?  Transaction Dates?
  - Insert Logo in Header?  Annual Salary?  Transaction Comments?
  - Zero Rated Leave?
  - Zero Rated Ord. Hours?
  - Zero Rated Allowances?
  - Preferred Name?
- Image File:** C:\Temp\Logo\_right.bmp [Browse]
- Payslip Message (15 lines maximum):** [Text area with instructions and a 'Clear Message' button]

Close

Click on either the **Standard** or **A4** print type and set any other Printing Options.

To send payslips as a PDF attached to the email, tick the **Send All as PDF** option.

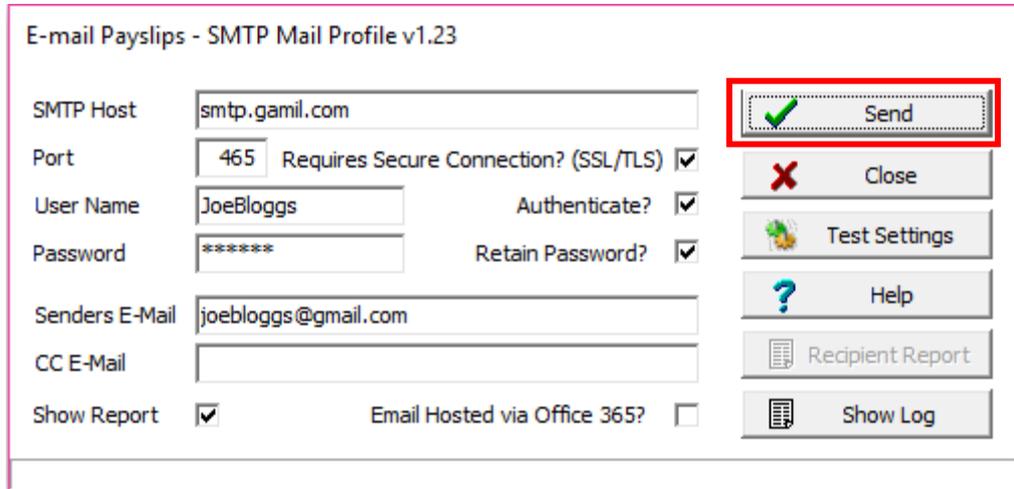
To embed a logo in payslips, click the **Browse** button next to **Image File** to select a BMP image to use.

**Note:** See the “Payslip Logo” document for detailed information on adding a logo image to payslips.

Close the Options screen, then click on the **Add >>** button on the 6-Reports tab to move the Payslip report into your standard reports.

## Sending Payslips

Sending Payslips is generally done as part of the pay run process during Step 6-Reports, although they can also be sent by selecting **Historical Payslips** on the Sundry Reports window. Click the **Print** button on the 6-Reports tab—the payslips will generate and your SMTP screen will display. Click the **Send** button.



When delivery begins, the SMTP Mail Profile window will display the progress and once successfully completed you will get the following message:

```
#####  
Email Payslip Session Finished Successfully.  
Payslips sent = 1  
#####
```

If the email session was successful, click the **Close** button and continue with your pay run.

## Sending Payslips via Office 365

If your company requires two-factor authentication (2FA), you can still use Office 365 to send payslips. To do so, the Office 365 administrator needs to set up app-specific passwords.

For more details, see Microsoft's instructions on [managing app passwords for two-step verification](#).

Depending on your company's security policies, it's possible to set 2FA for individual mailboxes. This means you could create an account for use exclusively on IMS, which doesn't use 2FA. See Microsoft's instructions on [securing authenticated SMTP in Exchange Online](#).

# Troubleshooting

## SMTP Connection Failure

If a connection to the SMTP server fails, a message will be displayed on the screen stating this or an exception error will be shown. Possible connection errors are discussed below.

### External SMTP Host

Where the SMTP Host is an external ISP or internal SMTP server:

- **Invalid SMTP Mail Profile settings.** Ensure these parameters are correct. The user should be getting this information from their Outlook mail account settings (or whatever email client they currently use).
- **Incorrect port.** Port 25 is the default port for sending email using the SMTP protocol—this should only be different if the user is connecting to an internal Exchange server that has been configured to use a different port, or if a secure connection to the SMTP server is required.
- **Security software on local PC.** If firewall software is present on the PC, a rule should be added to the firewall to allow **IMSPayrollPartner.exe** to bypass it. Some virus-scan software can also have firewall type functions that will block emailed payslips, which will also require **IMSPayrollPartner.exe** to be added to an exception list. It is important that Payroll Partner be allowed to communicate freely on the default port 25.
- **Different ISP from SMTP Server.** When using an external ISP's SMTP server, most ISPs won't allow logging on to their SMTP server for sending emails if the user is using a different ISP's broadband connection, unless you use a secure connection.
- **Secure connection settings.** If the SMTP server you are attempting to connect to requires a secure connection, ensure the options **Requires Secure Connection?** and **Authenticate?** have been ticked and that the **User Name** and **Password** fields have valid entries. The most common port numbers to use are 465 and 587 for secure servers, although these values should be obtained from the online documentation associated with the email provider or the Exchange Server administrator. For Exchange Server, the mixture of authentication and security settings can be configured to each organisation's needs, therefore the connection to one of these should be performed by your Exchange Server administrator.

**Note:** If the **Requires Secure Connection?** option is selected and the Email process freezes, it may be that the free Microsoft Visual C++ 2008 Redistributables need to be downloaded from the Microsoft website and installed. Most desktop workstations will have this installed by default, but some server workstations may not.

**Note:** Most ISPs require that the **Senders E-Mail** address is a valid email address [provided by that ISP.](#)

## IMS Payroll in the Cloud

When running MYOB IMS Payroll from the cloud environment it is important to realise that the payroll is actually being run on a remote server outside of your organisation. What this means in terms of emailing payslips/registration forms is that in order to connect to an ISP's SMTP server you will need to use a secure connection (using SSL and port 465 or 587 as detailed above). Email providers such as Gmail and Hotmail always require a secure connection, so should not be affected. At the time of this document there are still a small number of ISPs that don't support emailing through their SMTP servers from outside of their network (as IMS Cloud is being operated on a remote server, it will always be outside of your ISP's network); in these cases we recommend setting up a Gmail or Hotmail account.

**Note:** When connecting to an internal Exchange Server, the server will need to be configured to accept an SMTP connection from the internet. Any firewalls/spam filters/virus-scan software may also need to be configured to allow access to the Exchange Server from the internet.

## Message Delivery Failure

Emails may fail to send for a number of reasons either for individual recipients or for your company as a whole.

### Individual Failure

If an individual document fails to send, check the recipient's information including their email address. If you get a message saying the document was sent successfully ask them to check that their email box is not full and to check their junk mail. It is also suggested that your employees place the sender's email address in their trusted contacts list, as most email providers are doing their best to minimise spam.

### Total Failure

If all emails fail to send, check your SMTP settings with your IT people or provider. Most providers are doing their utmost to prevent spam so it could be that while the payslips have been produced your employees are not receiving them. In this scenario asking your provider to white list your email account/senders address may resolve the issue.

## Message Receipt Failure

If emails are sent successfully, but some recipients don't receive them, check the following for possible causes:

- The email address for the recipient has been entered incorrectly in MYOB IMS Payroll.
- The recipient's inbox on their ISP's mail servers are full—some ISPs will reject incoming email if the mailbox is full. This can be difficult to ascertain, as depending on the recipient email server an error message may or may not be returned to the sender.
- If the connection to the SMTP server is dropped during sending of email payslips, e.g. six are sent then the rest come up with an error message, this

indicates that either virus-scan software is killing the connection to the server because it sees the mailing of multiple messages of similar size as spam OR the SMTP Server itself has been configured to disconnect the connection for the same reasons as the virus-scan software. Disabling the email scanner function of the software fixes this issue. If disabling email scanning is not an option, you must configure the software to allow traffic initiated by **IMSPayrollPartner.exe** to access the SMTP server unconditionally. To determine if either of these scenarios is the cause try selecting ranges of employees from the Payslip Options to email, e.g. select names starting from “A” to “M” and then select names starting from “N” to “Z”. If all emails are sent, it is likely that there is some other application (virus-scan, firewall, spam filter) interfering with the email process.

- Microsoft Office 365 has a limit of sending a maximum of 30 emails per minute. An **Email Hosted via Office 365?** option is available on the SMTP Mail Profile screen to get around this limitation by putting a two second delay between each recipient’s email message—this option should only be used if you send more than 30 email payslips in a session via Office 365. Some Office 365 plans may also have other limitations for the number of emails which can be sent in a day, though the limit for this is 500+.
- Where an internal mail server is used, e.g. Microsoft Exchange Server, a common problem is that all the emails addressed to internal email addresses are sent but none of the email addresses hosted by external ISPs are. Exchange has a “relaying” function that allows messages destined for external email addresses to be “relayed” to the outside world via the Exchange Server; however, most IT staff are reluctant to do this as it can potentially open up their server to be used by spammers. ISPs will blacklist servers that produce spam, i.e. they will automatically block any messages originating from that server. There are ways to enable relaying for specific users on the LAN but this should only be done by the IT personnel who maintain the exchange server.