ClassRoom Manager and Student Manager Setup for Emailing Statements to Caregivers

To configure email settings to enable emailing caregivers from Classic modules, open CM Administrator.

School Details > Configure email settings > Email setup tab

Instructions for completing the email settings are included in the screen (below).

School Address	School Details	Curriculum Framework	Network delay		
Defaults	Dates	Multi-school option	Email Setup		
Email Server Type	SMTP - With Authentication	2			
SMTPI Username:	nz				
SMTP Password:	******				
SMTP service address	.nz				
Port:	25 Use TLS				
	In this screen you can setup your ema First, enter the type of email server yo Then, enter the details of your email s You can access advanced settings by School Zone users can also enter the "SMTP - No Authentication" area.	ail transport. ou want to configure. server. y selecting "SMTP - With Authentica details received from School Zone i	tion" in the		
	When you have finished, save and test your configuration.				

Open Student Manager

Select student > Personal Details > Mailing details

1 Setup for Emailing Statement Caregivers

From the student's details screen click 'Mailing Details'.

'Send invoices to 'Mail to whom' MUST be set to 'No'

Student's F (from P	Physical Address Preferred * ersonal details)	Student's Po	stal Address Preferred
Mail to whom	Mr J Mrs II Rommi		
Address 1	18 Citylin Place	Postal address 1	
Address 2	Charlenge of Delay	Postal address 2	
Address 3		Postal address 3	
Address 4		Postal address 4	
Address 5		Postal address 5	
Postal code		Postal code	
	Copy >		< Copy
Mail to greeting	2016 (2017) (C)	Geocode	
n addition to the io has two addre licate which of th used when you regiver? It depen tton for a full des d how the progra	above addresses, each caregiver ses and in all cases you can e two is 'Preferred'. Which one will design a document addressed to a ds. Click on the 'More information' cription of the various possibilities m works out which address to use.	Send invoices t Send reports to	o 'Mail to whom' (above) Ves 'Mail to whom' (above) Ves • More information
		Class	7

Set up one statement with the Caregiver address

"First Financial = Yes". This will go to the first caregiver who has the tick against "Invoices".

Set up a second statement with the Caregiver address

"Second Financial = Yes". This will go to the second caregiver who has the tick against "Invoices".

Ensure the correct email address is entered on the 'Caregivers' page. The statements are saved to file as a PDF and stored in drive/cm/financial documents/statements/ PDF - from here they are named with the 'statement name and date'. Inside this folder the PDF are named with the student ID, date and time.

2 How to email statements

Go to Student Financial > Print Statements

Step 1 – select your statement and choose the options you require

Step 2 – select the billable items required

Step 3 – select 'students' (or family if using a family statement)

Step 4 – click 'Save as PDF Files and Email to Caregivers'

Print traditional statements for 1 students printing 1 copies of each statement printing all regardless of balances ther Proceed to Print Statements Save as PDF Files and Email to Caregivers	u are abou	t to :		
for 1 students printing 1 copies of each statement printing all regardless of balances ther Proceed to Print Statements Save as PDF Files and Email to Caregivers	Print trac	itional statements		
printing 1 copies of each statement printing all regardless of balances	for 1 stu	lents		
printing all regardless of balances ther Proceed to Print Statements Save as PDF Files and Email to Caregivers	printing 1	copies of each statement		
ther Proceed to Print Statements Save as PDF Files and Email to Caregivers	printing a	ll regardless of balances		
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Save as PDF Files and Email to Caregivers	ither [Proceed to Print Statements		
الإيا	ither [Proceed to Print Statements		
	ither (Proceed to Print Statements Save as PDF Files and Email to Caregivers		
	ither [)r [Proceed to Print Statements Save as PDF Files and Email to Caregivers Just Print a List of Qualifying Students and		

Step 1 Select caregiver	
First financial = Yes	l
Caregiver 4 Caregiver 5 Caregiver 6 Caregiver 7 Caregiver 8 Emergency contact	12
First financial = Yes	
First report = Yes Second financial = Yes Second report = Yes	



Second financial = Yes	T
Caregiver 4	h
Caregiver 5	
Caregiver 6	
Caregiver 7	
Caregiver 8	
Emergency contact	-
First financial = Yes	
First report = Yes	
Second financial = Ye	s
Second report = Yes	-

The next screen displays the Student, Caregiver, Email address and Send columns. Under "Send" column – tick the email addresses you want to send the statement to. You also have the choice of "Select All". If the Caregiver does not have an address you are not able to tick Send.

		Caregiver	eMail address	Ser	nd 🔺
Aa Ba	alance : -(25.00) Dr	A	m	i@hotmail.com ✓	
Return Email Add	ress			Select Nor	Te
Financial and p	astoral default addre	ss selected.			
Financial and p	oastoral default addre	ss selected.	•		
Financial and p mc <u>Change fina</u>	oastoral default addre	ss selected. return address	•		

Check the school email address and school ISP provider are correct.

- Add a message which is automatically inserted into the email
- Click 'Proceed'
- A confirmation message will appear of the emails sent

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, Is aina Ba	lance : -(25.00) Dr	Ar A	million	n liens al @hotmail.com	1	
Return Email Addr	ess			Se	lect None	
Financial and p	astoral default addre	ss selected.				
and the second second	.com		-			
Change fina	ncial and pastoral	return address		MUSAC Classic 2013		
Email message	Please find attache Please send throug on 123 4567 Ext 3	ed your statement for 2013. gh any queries you may have or 33	give me a call	To : A	se	ent successfully
	Thank you.					ОК
	Executive Officer					



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