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	na dia kaodimina dia kaodimina amin'ny fisiana amin'ny fisiana amin'ny fisiana amin'ny fisiana amin'ny fisiana		
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.	u want to configure. erver. y selecting "SMTP - With Authentica details received from School Zone	
	When you have finished, save and te	st 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'

	Physical Address Preferred *	Student's Po	ostal Address Preferred *
Mail to whom	Mr J Mrs II Russill		
Address 1	18 Citylin Place	Postal address 1	
Address 2	Charles and select	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) (0.1	Geocode	
to has two addrest ficate which of the used when you or regiver? It dependent tton for a full dest	above addresses, each caregiver sees 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.		to "Mail to whorn' (above) Yes o "Mail to whorn' (above) Yes • More information
		Clase	-

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'

u are about	to :			
Print tradit	tional statements			
for 1 stude	ents			
printing 1	copies of each statement			
anishing all	regardless of balances			
printing all	regulaters of salaries			
printing all				
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printing all				
	(4) Configuration of the state of the sta			
her	Proceed to Print Statements]		
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Step 1 Select caregiv	er
First financial = Yes	┓
Caregiver 4 Caregiver 5 Caregiver 6 Caregiver 7 Caregiver 8 Emergency contact	
First financial = Yes	
First report = Yes Second financial = Yes Second report = Yes	-



Second financial = Yes	N
Caregiver 4	NS
Caregiver 5	
Caregiver 6	
Caregiver 7	
Caregiver 8	
Emergency contact	=
First financial = Yes	
First report = Yes	
Second financial = Yes	
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.

Student		Caregiver	eMail address	Se	nd 🔺
Aa Ba	alance : -(25.00) Dr		m	■@hotmail.com ✓	
Return Email Add	ress			Select No	ne
Financial and p	astoral default addre	ss selected.			
	oastoral default addre	ss selected.			
maintenantia					

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

Student		Caregiver	eMail	address	Send	
, Is aina Ba	lance : -(25.00) Dr	Arma in America	m	e e ille e e l@hotmail.com	1	
				_		-
Return Email Addr	ess astoral default addre	ss selected		S	elect None	
	.com		-			
<u>Change fina</u>	ncial and pastoral	return address		MUSAC Classic 2013		×
Email message		ed your statement for 2013. gh any queries you may have or 33	give me a call	To : Amana	A nter : se	ent successfully
	Thank you.					ОК
	Executive Officer					



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