



Employee Email Suite

User Guide

For Microsoft Dynamics® GP (2018)

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Installation Overview

Installation instructions are covered in the Installation Guide. The items below however, are specific to the Employee E-mail Suite or are general notes worth mentioning.

Prerequisite

The Employee E-mail Suite consists of two modules that provide additional capabilities for an existing Microsoft Dynamics GP installation: Employee Email Suite and E-Mail W-2 Statements.

The prerequisites for the Employee E-mail Suite:

- Microsoft Dynamics GP Payroll
- Direct Deposit
- .NET Framework 4.8 or above
- PDF Creation-
 - ID PDF Print Manager Print Driver - Free installation can be found at Integrity-Data.com
 - Adobe Acrobat Standard XI or DC
- E-Mail Sending Options
 - Microsoft Outlook 2013 or 2016
Requires installing Integrity Email Addin and Visual Studio Tools for Office
 - SMTP Server – Outlook 365 and Outlook 2016 supported via SMTP setups

Install Notes

Prior to installing, validate the steps:

- Confirm all users are logged out of Microsoft Dynamics GP
- Complete all payroll runs and confirm no payroll runs are in process
- Make a backup of the company and Dynamics databases

Files Installed

The files installed for Employee Email Suite are:

GP Folder is under C:\Program Files (x86)\Microsoft Dynamics\ The folder name varies based on when it was installed.

Email Suite Program Files	EES.cnk or EES.dic
Email Suite Files	Application.EmployeeEMailSuite.dll
	Integrity.Email.Addin.dll
	Integrity.Email.Addin.Smtp.exe
OAuth files	BouncyCastle.Crypto.dll
	Google.Apis.Auth.dll
	Google.Apis.Auth.PlatformServices.dll
	Google.Apis.Core.dll
	Google.Apis.dll
	Google.Apis.PlatformServices.dll
	MailKit.dll
	Microsoft.Identity.Client.dll
	Microsoft.IdentityModel.Abstractions.dll
	MimeKit.dll
	System Buffers.dll
	System.Memory.dll
	System.Numerics.Vectors.dll
	System.Runtime.CompilerServices.Unsafe.dll
	System.Text.Encoding.CodePages.dll
	System.Threading.Tasks.Extensions.dll

Documentation Folder is under the GP Folder

- Employee E-mail Suite User Guide.pdf

W2-Attach Folder is under the GP Folder sub-folder Data\W2-Attach

- W-2 Instruction.pdf

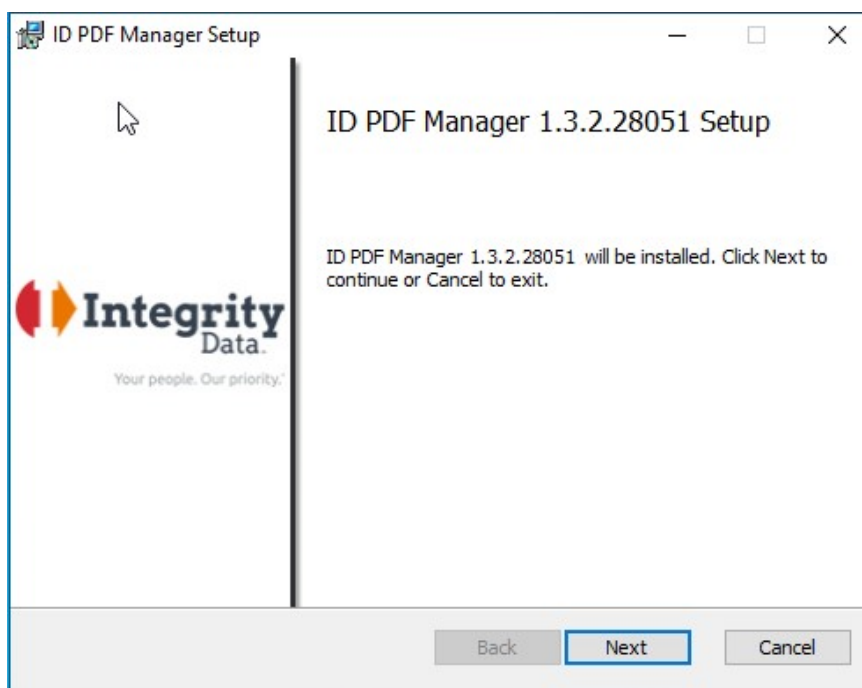
ID PDF Print Manager

The Installer for this print driver can be found in the Employee Email Suite section of the GP Downloads page at Integrity-Data.com. This Print Driver is required to use the ID PDF Print Manager Adobe replacement.

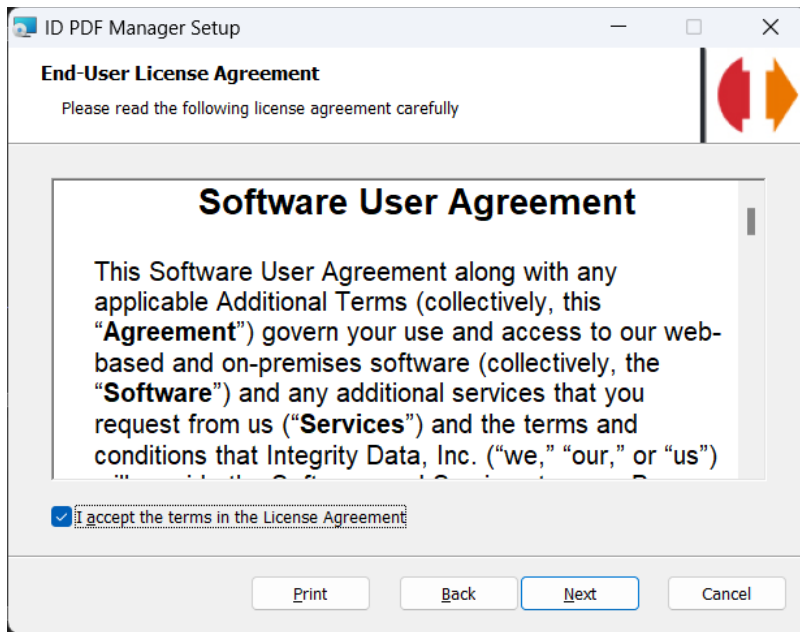
.Net Framework 4.8 or higher is required to use and Install this Print Driver,

Integrity ID PDF Print Manager Install

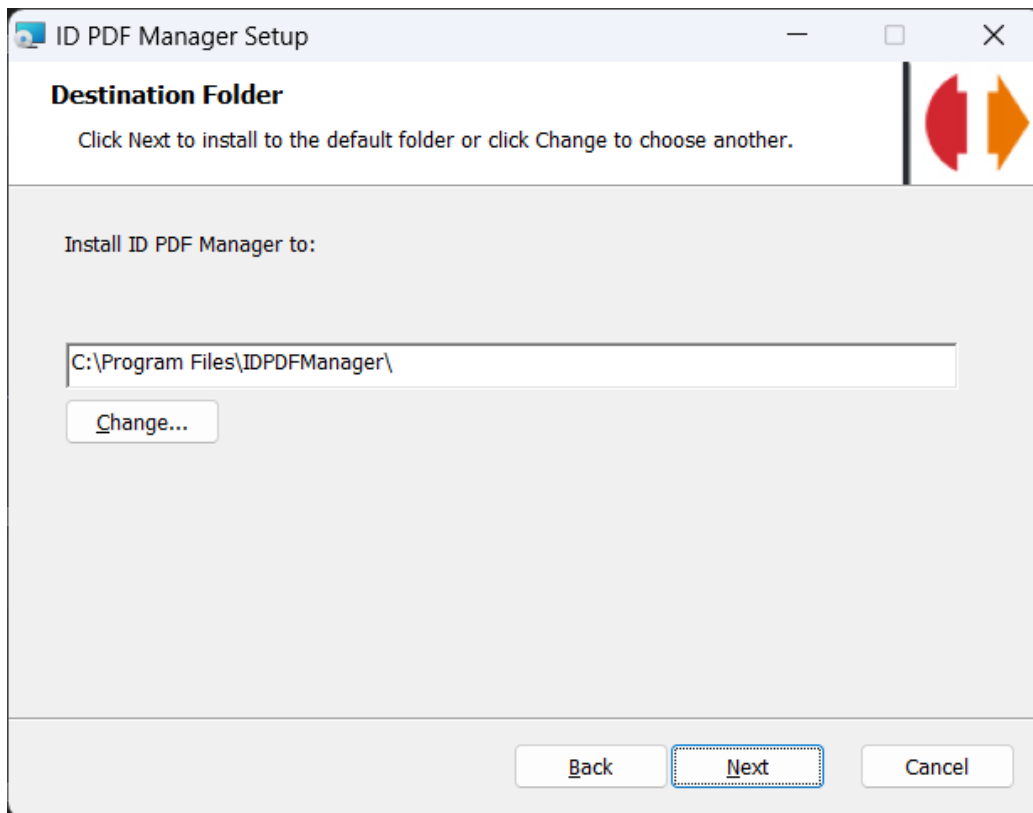
1. Download the ID PDF Print Manager Installer from Integrity-Data.com
2. Run the Installer as Administrator
3. Click Next



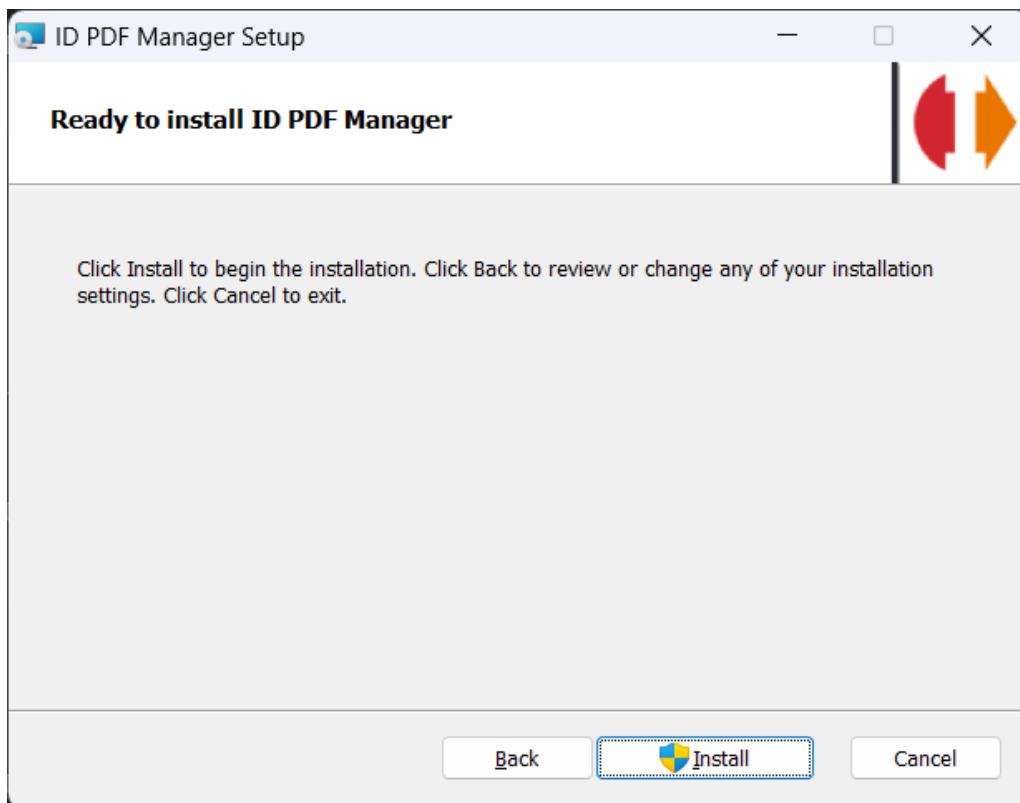
4. Accept the terms in the License Agreement and click next



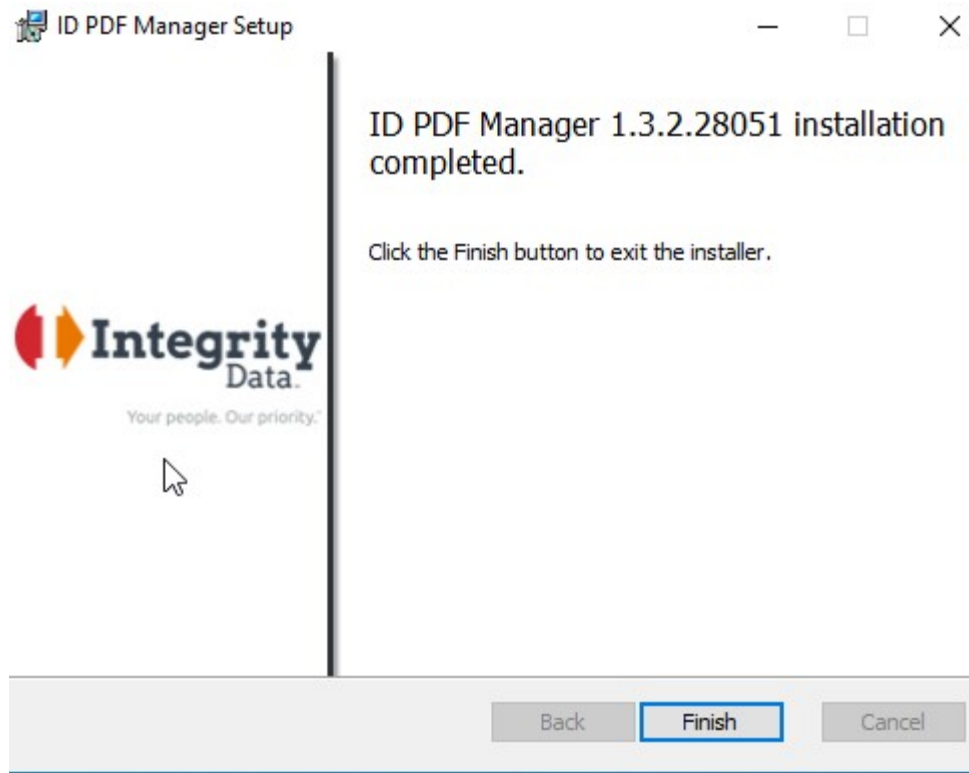
5. Click Next



6. Click Install



7. Click Finish



Note: This will put a new Printer onto your device's Printers and Scanners list named "ID PDF Manager"
Do not remove this printer as this is what the system uses to create the PDFs for EES.

Microsoft Outlook

If Microsoft Outlook will be used to send the Employee Email Suite or the E-Mail W-2 Statements file to employees and track returned e-mails. The Integrity E-Mail AddIn must be installed. See further information below for installing [Integrity E-Mail AddIn Install](#).

If the company would like the statement(s) to be sent from a 'general payroll' Outlook account and not from a payroll clerk's personal Outlook account it is recommended to set up Multiple Outlook profiles.

Multiple Outlook Profile

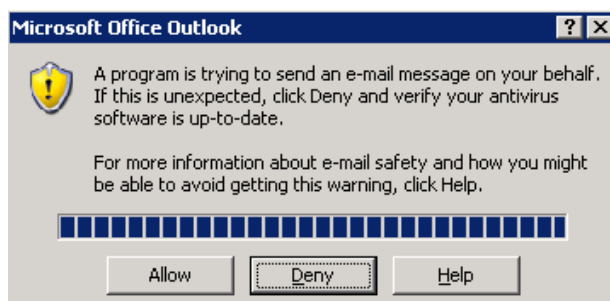
Setting up a separate Network account and Outlook profile allows the company to send Employee Email Suite or E-Mail W-2 Statements through a 'general payroll' Outlook account instead of using the payroll clerk's personal Network account and Outlook profile. Contact your IT Department for details on setting up a separate Network account and Outlook profile. Integrity Data does not support Microsoft Outlook functionality.

If the user creates a 'general payroll' Outlook profile it is important to verify Microsoft Dynamics GP is connected to the correct Outlook profile. The Employee Email Suite or E-Mail W-2 Statements will be sent from the Outlook profile connected to Microsoft Dynamics GP.

Integrity E-Mail Addin Install

If Microsoft Outlook will be used to send the Employee Email Suite or the E-Mail W-2 Statements file to employees and track returned e-mails then the Integrity E-Mail AddIn is required for Employee E-mail Suite.

The AddIn file must be installed on the client machine sending the e-mails. This file enables the Trust Center Programmatic Access Security within Microsoft Outlook to function under the recommended settings. The user will no longer receive the message: A program is trying to send an e-mail message on your behalf. If this is unexpected, click Deny and verify your antivirus software is up-to-date. If this is unexpected, click Deny and verify your antivirus software is up-to-date.



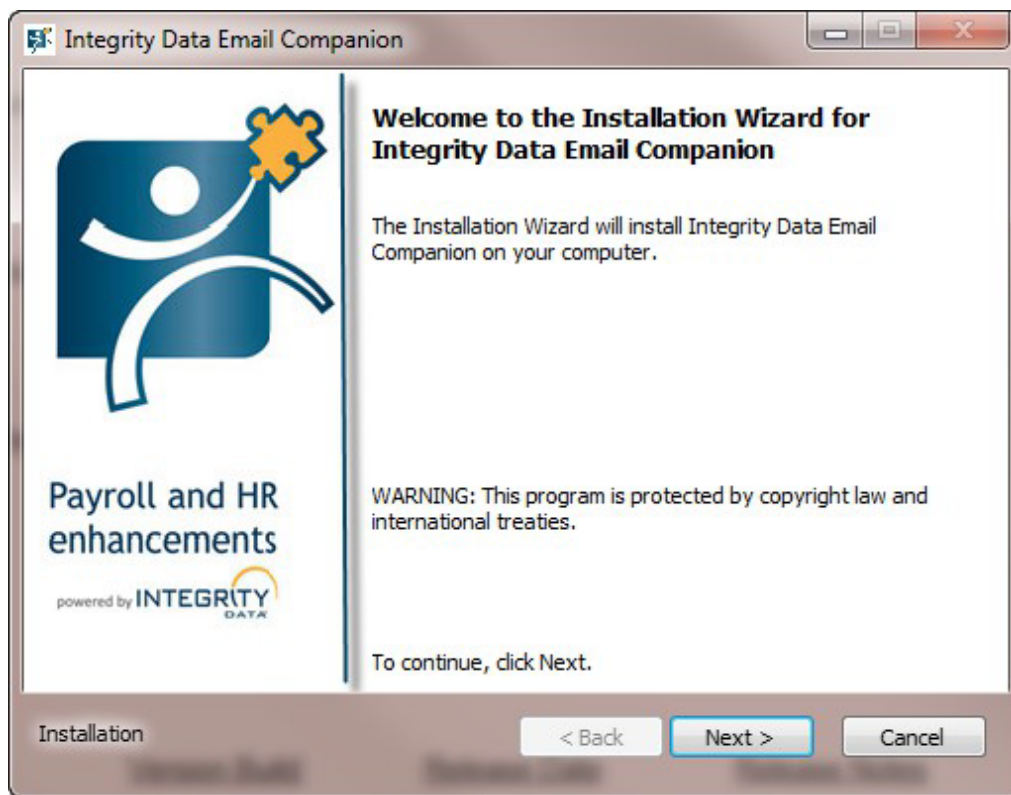
Install Notes

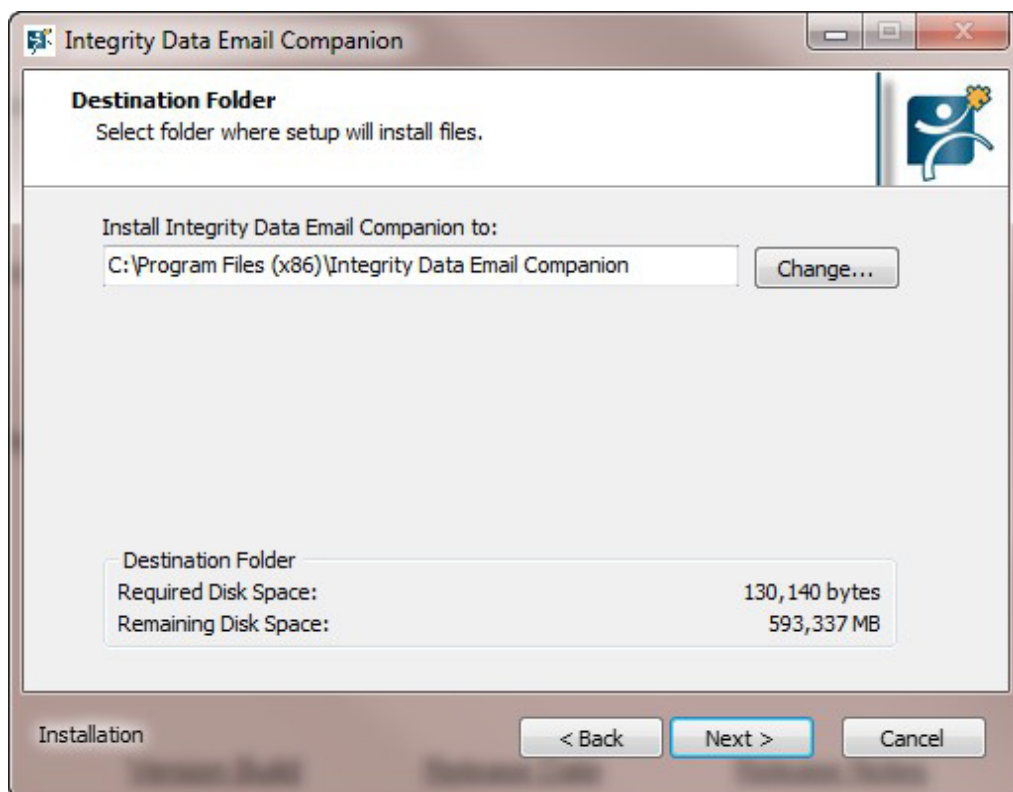
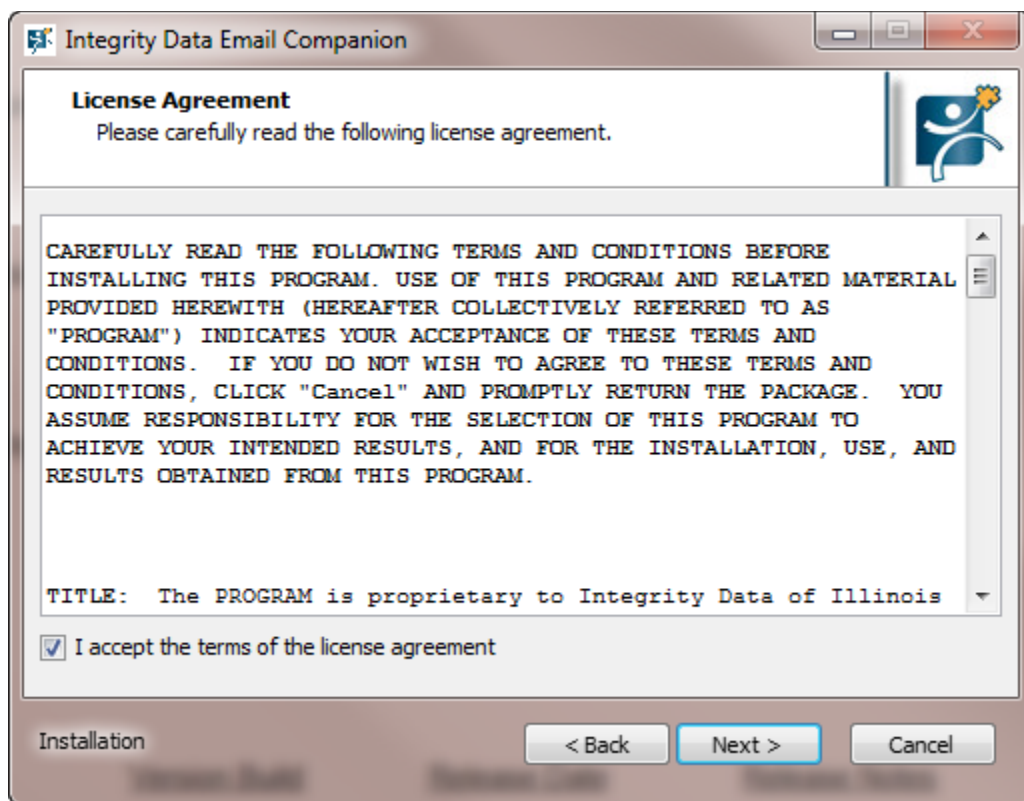
Prior to installing:

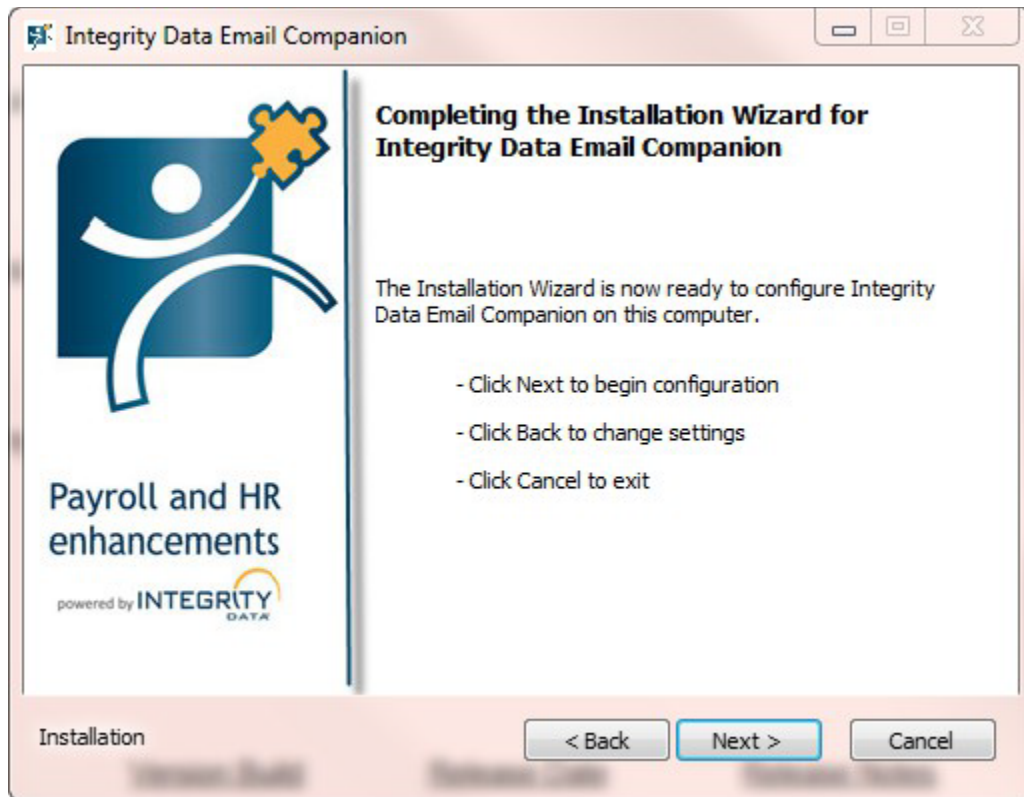
- Confirm users are logged out of Microsoft Outlook
- The install can be run as the administrator or as the user by right clicking and selecting run as administrator.

To install the Integrity E-Mail Addin the Addin must be downloaded from our [website](#) and installs processed on the Machine(s) sending e-mails.

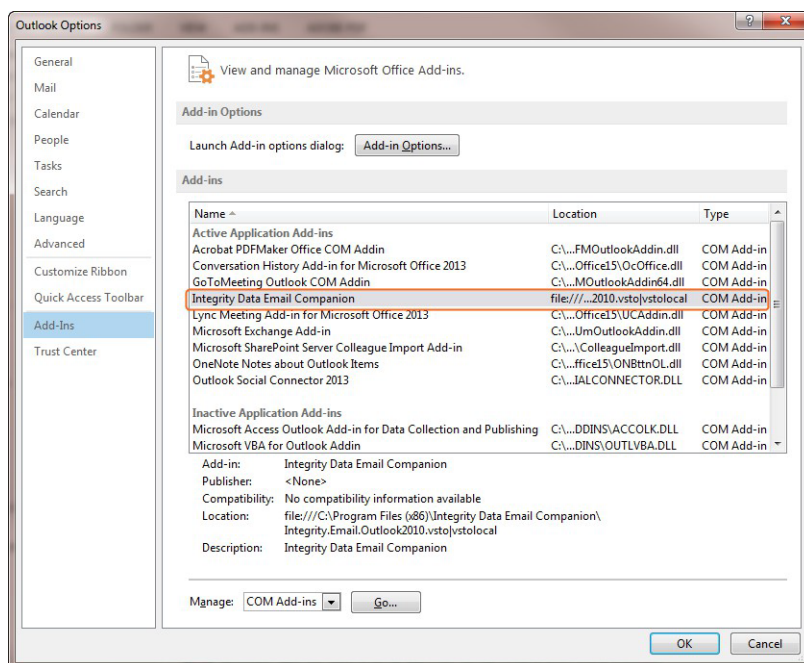
1. Right click the Outlook Setup.exe file and select run as Administrator.
2. Complete the steps in the wizard.







3. Launch Microsoft Outlook.
4. Select File > Options > Addin
5. Validate the Integrity Email Companion Add-In is displayed under the Active Application Add-Ins.



Mail Server Setup

Employee E-mail Suite is designed to send mass amounts of e-mails. Ensure the mail sever will allow the client to send the maximum number of e-mails for the payroll process.

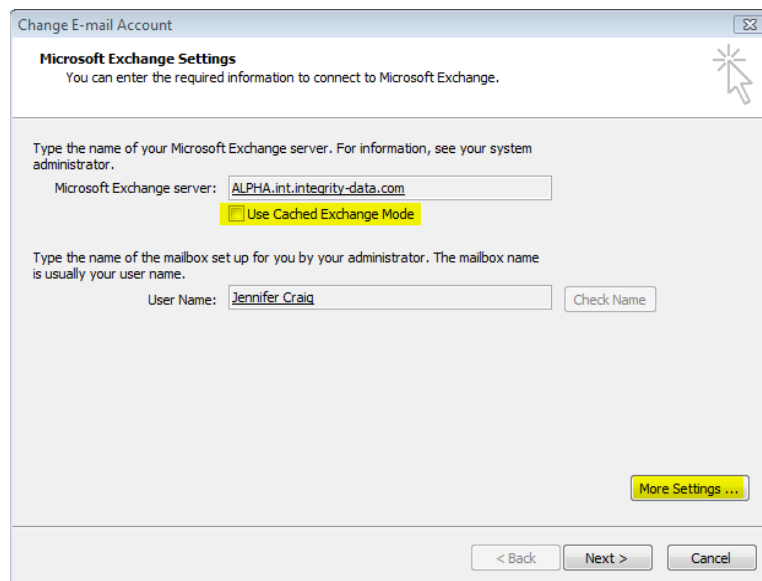
Microsoft Exchange Setups for Employee E-mail Suite

Employee E-mail Suite is designed to send mass amounts of e-mail. If the user is running Microsoft Outlook connected to a Microsoft Exchange Server, then certain settings to the client Microsoft Outlook are needed to ensure all the desired e-mails are sent. Keep in mind that turning the cache off, the user cannot use the client junk mail filter for their anti-spam and the user will need to rely on their centralized network anti-spam application.

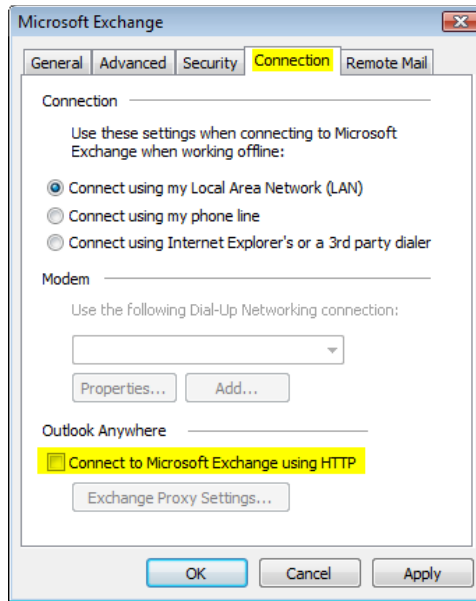
The user is not required to use Microsoft Exchange Server.

To adjust the settings within Microsoft Outlook:

1. Navigate to Tools > Account Settings
2. Double-click the Microsoft Exchange Name on the E-mail tab
3. Within the Change E-mail Account window unmark the “Use Cached Exchange Mode”
4. Select the More Settings... button



5. Within the Microsoft Exchange window, select the Connection tab
6. Unmark “Connect to Microsoft Exchange using HTTP” checkbox



7. Click OK to close the Microsoft Exchange window
8. Close the Change E-mail Account and Account Settings windows
9. Restart Microsoft Outlook

SMTP (Simple Mail Transfer Protocol) and OAuth (Open Authorization)

If Earnings Statements and W-2s are going to be delivered using SMTP configuration the required configuration will need to be completed on E-Mail Suite Setup.

Setting up OAuth may require your IT Provider to grant access and because applications you are authorizing can take some time to “roll down” that access, Integrity Data highly recommends that you set up your SMTP and click the Verify button well in advance of Emailing Earning Statements or W-2s.

This section outlines how to set up Open Authorization (OAuth) for Microsoft or Google apps within Employee E-Mail Suite. It does not include instructions to set up the apps being authorized; however, there are some links below that may help you with that.

NOTE: Free Gmail and Microsoft accounts are ‘throttled down’ so if you are sending many emails, it might be necessary to get a paid account instead. For example, exceeding thirty emails per minute may fail. The number that causes throttling is determined by Google and/or Microsoft.

Microsoft OAuth

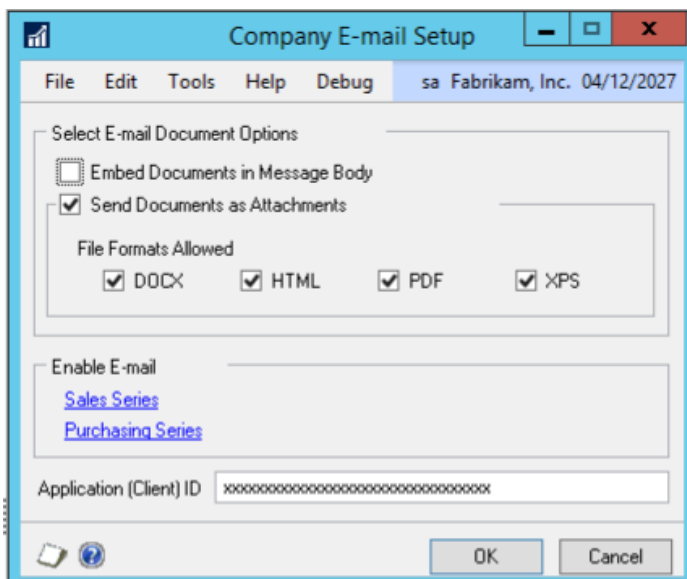
From the E-Mail Suite Setup window, select the E-Mail Method of SMTP. Choose Microsoft OAuth for the authentication method and click the blue arrow to the right of the Application (Client) ID field, to open the Company E-mail Setup window.

Tools>Setup>Payroll>E-Mail Suite Setup

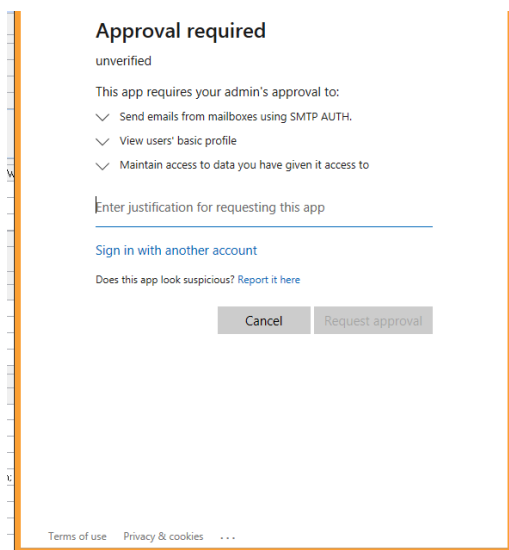
The screenshot shows the 'E-Mail Suite Setup' window with the following details:

- Product Option:** E-Mail Earnings Statements
- Activate:** ☒
- E-Mail Method:** SMTP
- Subject Line:** Earnings Statement
- Blind Carbon Copy:** (empty field)
- E-Mail Body:**
 - Please see the attached for your current earnings statement.
 - Password to open this document is the last 4 digits of your SSN.
 - Thank you for all you do for us.
 - Regards,
 - Payroll
- SMTP Settings:**
 - Outgoing Server: smtp.office365.com
 - Outgoing Port: 587 ☐ Enable SSL/TLS
 - Authentication: Microsoft OAuth
- Application (Client) ID:** (empty field) with a blue arrow pointing right.
- Client Secret:** (empty field)
- Username:** (empty field)
- Password:** (empty field)
- Reply-To Address:** payroll@company.com
- Reply Name:** Payroll
- Verify SMTP:** (empty field)
- Options:**
 - Password:** Last 4 of SS Number
 - Employee PDF File Location:** C:\Earm Stmt 2022\
 - ☐ Include E-Mailed Earnings Statements when printing
 - ☒ Archive E-Mailed Earnings Statements
- Buttons:** Missing E-Mail List, Employee Exception List, OK, Cancel

Enter the Client ID from the app you are authorizing and click OK.



Depending on your setup, you may get a window requesting that you select an account and then see something like this:



Helpful info and links from Microsoft for setup:

1. This article [Multi-Factor Authentication - Dynamics GP | Microsoft Docs](#) has information to utilize Azure Active Directory App Registration for use in Microsoft Dynamics GP. Employee Email Suite (EES) also uses this setup. The last step - "Click on Overview on the left side pane. The Application (client) ID can be used in Microsoft Dynamics GP" - is what you need for EES as well.
2. Basic Authentication to Modern Authentication - [Dynamics GP and Modern Authentication](#)

3. Dynamics GP Email Setup Guide
[Dynamics GP Email Troubleshooting Guide - Dynamics GP | Microsoft Docs](#)
4. This is the link on limitations of email.
[Exchange Online limits - Service Descriptions | Microsoft Docs](#)

Google OAuth

From the E-Mail Suite Setup window, select the E-Mail Method of SMTP. Choose Google OAuth for the authentication method and paste in your ID and Client Secret.

Google offers services that you may need to purchase for effective email throughput. See documentation on those services for instructions to get a Client ID and Secret for your production environment.

Tools>Setup>Payroll>E-Mail Suite Setup

The screenshot shows the 'E-Mail Suite Setup' window with the following configuration:

- Product Option:** E-Mail Earnings Statements
- Activate:** ☒
- E-Mail Method:** SMTP
- Subject Line:** TEST00B-G-OAUTH
- Blind Carbon Copy:** (empty)
- E-Mail Body:** Google OAuth test
- SMTP Settings:**
 - Outgoing Server:** smtp.gmail.com
 - Outgoing Port:** 587
 - Enable SSL/TLS:** ☐
 - Authentication:** Google OAuth
 - Application (Client) ID:** 170227964226-j75s6ut1de72uficim66git5oek
 - Client Secret:** (masked with dots)
 - Username:** (empty)
 - Password:** (empty)
 - Reply-To Address:** test@test.com
 - Reply Name:** TESTING123
 - Verify SMTP:** (button)
- Options:**
 - Password:** Last 4 of SS Number
 - Employee PDF File Location:** C:\Dextr\EES PDF Files\
 - Include E-Mailed Earnings Statements when printing:** ☐
 - Archive E-Mailed Earnings Statements:** ☐
- Buttons:** Missing E-Mail List, Employee Exception List, OK, Cancel

Set Up Adobe Writer for Employee E-Mail Suite

In order for the system to create the e-mail statements PDF file, the “Rely on system fonts only; do not use document fonts” option must be unchecked on the Adobe PDF Printing Preferences window. If the option is checked, the user will receive error messages and will *not* be able to send the e-mail statement PDF file. For steps to unmark this option, review our Knowledge Base article: [How do I prevent a PostScript error message? - Integrity Data \(integrity-data.com\)](https://integrity-data.com/knowledge-base/how-do-i-prevent-a-postscript-error-message/)

Citrix and Adobe Acrobat

It must be noted that Adobe has a special deployment method for Citrix servers. If you are on a Citrix server verify with Adobe that it is correctly installed on your server. If it is not correctly installed, the product will not function properly. Please contact Adobe with any questions regarding the deployment on a Citrix server.

<https://www.adobe.com/devnet-docs/acrobatetk/tools/AdminGuide/citrix.html>

Security Settings

Network User Security Settings

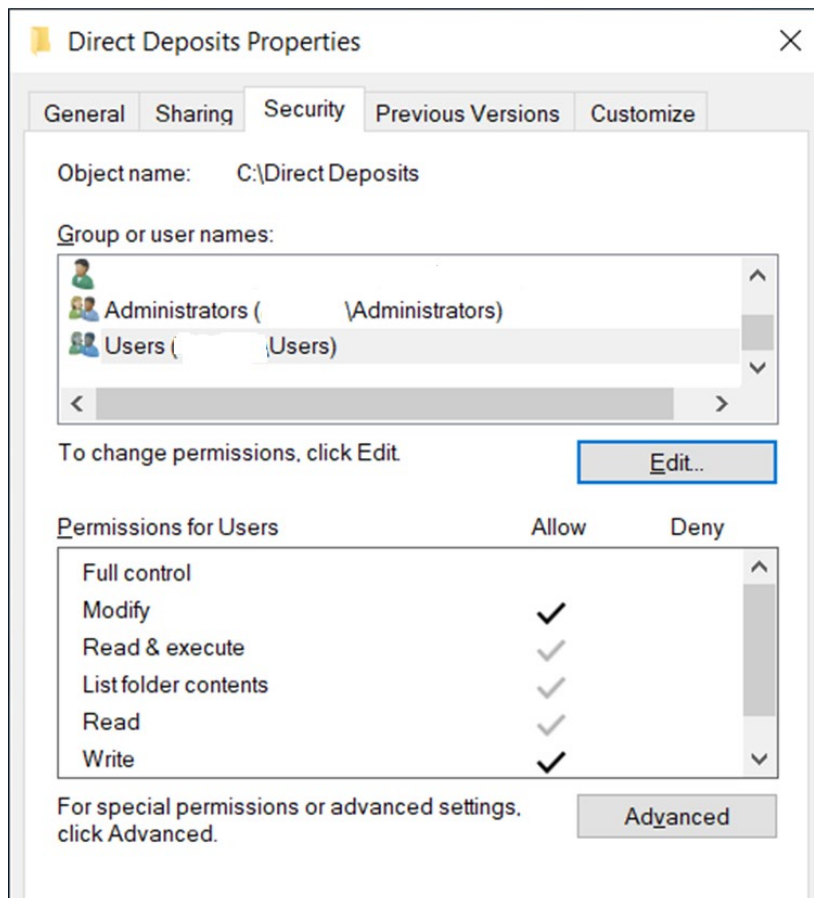
For the Email Earning Statement process to create, secure, and send the Earning Statements, the User will have to have system permissions to be able to read, write, and modify the folder that the Earning Statement PDFs are being created. (The location of this folder is set in the Employee Email Suite Setup window.)

NOTE: If you are using a RTS or Citrix style server to log into GP, then these permissions may also need to be added to the GP Runtime folder as well (C:\Program Files (x86)\Microsoft Dynamics\GP)

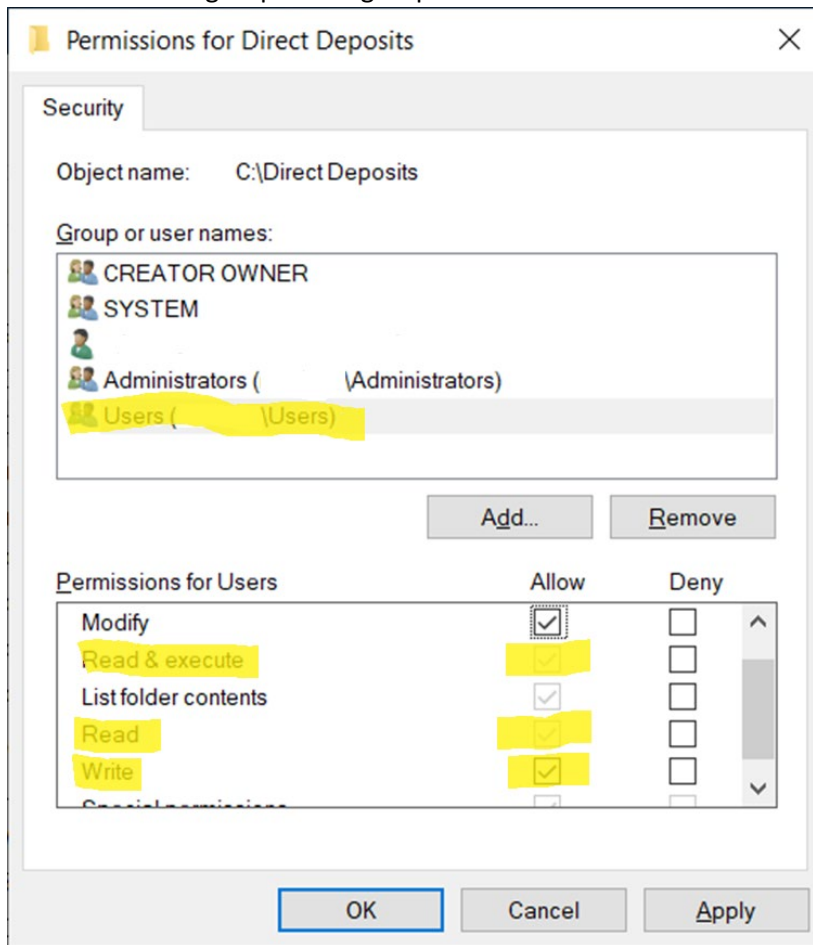
These steps may need to be set up by your system Admin or IT department.

To set these permissions you need to do the following –

1. Navigate to the folder location using File Explorer
2. Right Click on the folder and select Properties
3. Click on the Security Tab of the Properties Window and Click Edit



4. Select the Users group or the group that contains the User that will be running the Email Suite process.



5. Check the Allow Check Boxes for the Read, Write, and Read & execute, Click Apply and OK.

This will set the necessary permissions to the folder for the Employee Email Suite Process to run to completion.

Dynamics GP Security Settings

The Security Task Setup window may be used to grant or restrict access to the Employee E-mail Suite windows. To open the window, select the Microsoft Dynamics GP menu, select Tools, select Setup, select System, select Security Tasks and enter the system password.

1. Select the appropriate Task items. To identify the appropriate task item complete the steps below:
 - Open the User Security Setup window (Microsoft Dynamics GP > Tools > Setup > System > User Security), select the appropriate user and make a note of the Security Role ID assigned to the user.
 - Open the Security Role Setup window (Microsoft Dynamics GP > Tools > Setup > System > Security Roles), select the Role ID that has been assigned to the user and make note of the Security Task ID assigned to the Role. Use this Task ID to grant security to the Employee Email Suite.
NOTE: The most common Task ID used is TRX_PAYRL_004 – Print Payroll Checks
2. Select Employee E-mail Suite for the Product.
3. Select Windows for the Type and select 3rd Party for the Series.

4. Use the Access List to grant or restrict access to individual items.
 - To grant or restrict access to an item for this Task ID, click the checkbox to mark or unmark the item.
 - Click the Mark All button to grant access to all items in the list or click the Unmark All button to restrict access to all items in the list.
5. Click File > Print to print the Security Task Setup Report for the selected Task ID.
6. Choose OK to save your changes.

Employee E-mail Suite > Windows > 3rd Party > Access List

- E-Mail Earnings Statements
- E-Mail Suite Setup
- Password Setup
- Registration – EES
- APR Main Menu
- E-Mail W-2 Statements
- Manage W-2 Recipients

Employee E-mail Suite > Reports > 3rd Party > Access List

- Earnings Statement Exceptions
- EES Error Report
- EES Missing Email Report
- E-Mail W2 Recipients
- E-Mail W2 Statements
- W-2 Employee Copy 2
- W-2 Employee Copy B
- W-2 Employee Copy C
- W-2 Employee Copy D

Direct Deposit Setup

Microsoft Dynamics GP > Tools > Setup > Payroll > Direct Deposit

The Earnings Statement Print option on the Direct Deposit Setup window needs to be set to “Separate From Checks” in order for E-Mail Earnings Statements to function properly.

Direct Deposit Setup - TWO (sa)

OK

Cancel

File

Tools

Help

Add Note

Actions

File

Tools

Help

Direct Deposit

☐ Inactive
 ☒ Active

Earnings Statement Print:

Separate From Checks

Next Earnings Statement Number

DD00000000000000000000199

Default Prenote Count

1

Days From Pay to Post

0

Check for Exceptions

☐ Insufficient Funds
 ☐ Amount Deducted, Not Deposited
 ☐ Other

Visual Indicators for Voided Checks

☐ Mask Dollar Amount
 ☐ VOID Due to DD Stamp

Update Bank Reconciliation With

☒ Individual Employee Earnings Statements
 ☐ One Total Amount for all Employee Earnings Statements

ACH Fields

Headers/Footers

Links

Introduction to Employee Email Suite

Organizations are increasingly moving toward payroll processing using Direct Deposit. The E-Mail Earnings Statements extends the payroll process functionality of Microsoft Dynamics GP to support the e-mailing of Earnings Statements as an added option during the print checks portion of the payroll process.

The system will allow the user to:

- Specify setup options for employees to receive e-mail earnings statements;
- Add employees to an E-Mail Exceptions Report;
- Password protect the e-mailed earnings statements (up to 15 characters);
- Validate employees address ID on the Missing E-Mail List Report;
- Generate individual earnings statements for employees and
- E-Mail the statements to employees.

The user will complete the following setup options:

- E-Mail Configuration information
 - E-Mail Method
 - Subject Line
 - E-Mail Body
 - Blind Carbon Copy
 - Password
 - PDF file location
- Employee Exceptions
 - Employee ID
 - Employee Name
 - E-Mail Address

E-Mail Earnings Statements will process if the following conditions are met:

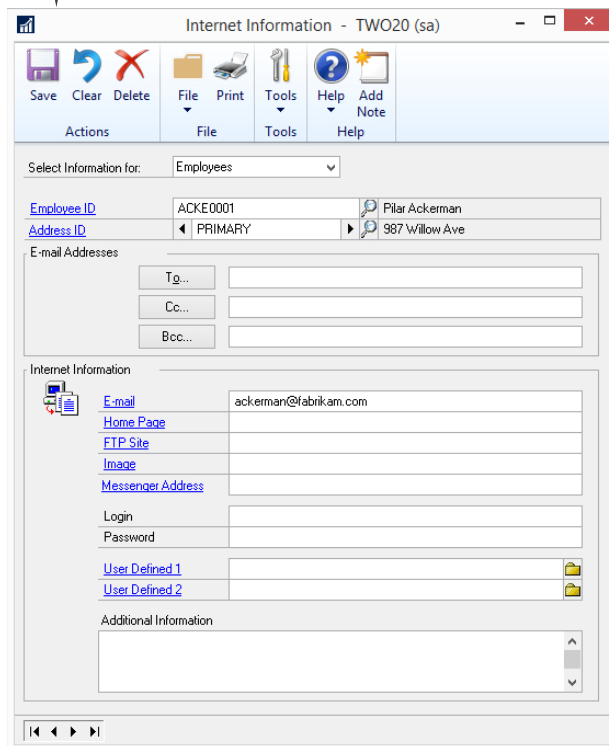
- The Employee E-Mail Suite is installed and registered;
- The user has selected the Activate E-Mail Earnings Statements checkbox;
- The employee has an e-mail address assigned on the Internet Information window;
- Direct deposit must be active and setup for the employee and
- The employee must be included in the payroll run and not appear on the Exception List Report.

Internet Information Window

Cards > Payroll > Employee > Select Employee > Address ID field > Internet Addresses button 

The Internet Information window allows the user to enter one or more e-mail addresses for each employee based on an address ID. Employee E-mail Suite will only use the e-mail address that is associated to the address ID code that is in the Address ID field on the Employee Maintenance window.

If the Address ID on the Employee Maintenance window is not associated with an e-mail address on the Internet Information window, the employee will appear on the Missing E-Mail List Report.



Internet Information - TWO20 (sa)

Save Clear Delete File Print Tools Help Add Note

Select Information for: Employees

Employee ID: ACKE0001
Address ID: PRIMARY
Pilar Ackerman
987 Willow Ave

E-mail Addresses

To...
Cc...
Bcc...

Internet Information

E-mail: ackerman@fabrikam.com
Home Page
FTP Site
Image
Messenger Address
Login
Password
User Defined 1
User Defined 2
Additional Information

Assign an E-Mail Address to an Address ID

- Select the Internet Addresses button  on the Employee Maintenance window
- Enter the E-mail address in the E-mail field, within the Internet Information section
- Save and validate the Address ID on the Employee Maintenance window

Assign Multiple E-Mail Addresses to an Employee

If an employee has more than one e-mail address, the E-Mail Earnings Statement will only be e-mailed to the address ID defined on the Employee Maintenance window. The following is specifics on how multi e-mail addresses process.

Employee Maintenance - TWO20 (sa)

Save Clear Delete Write Letters Go To File Print Tools Help Add Note

Employee ID: ACKE0001 Class ID: SUPP Inactive

Last Name: Ackerman First: Pilar Middle: Suffix: Soc Sec Number: 917-23-9833

Seniority Date: 0/0/0000 Hire Date: 8/3/2023 Adjusted Hire Date: 8/3/2023 Last Day Worked: Date Inactivated: 0/0/0000 Reason: Secondary Status: SUTA State: IL Workers' Comp: ILWC01 Employment Type: Full Time Regular Use Add-On

Address ID: PRIMARY Address: 987 Willow Ave City: Winnetka State: IL ZIP Code: 98272 County: Country: USA Phone 1: (312) 555-0115 Ext. 0000 Phone 2: (312) 555-0150 Ext. 0000 Phone 3: (312) 555-0151 Ext. 0000 Division: MAIN Department: SPTS Position: CSP Location: PRIMARY Supervisor: SUPMGR

Additional Positions Human Resources Address Additional Information Vac/Sick

by Employee ID

For example, Ackerman has two address IDs, one PRIMARY and one SECONDARY. Within the [Internet Information window](#), the address IDs are as follows:

PRIMARY Address ID = e-mail address ackerman@fabrikam.com

SECONDARY Address ID = e-mail address pilarackerman@testcompany.com

In the above Employee Maintenance window, Ackerman has the PRIMARY Address ID selected. At the time the E-Mail Earnings Statements sends the e-mail, the system will use the e-mail Address associated to the PRIMARY Address ID that is ackerman@fabrikam.com.

If the employee wants the E-Mail Earnings Statements sent to pilarackerman@testcompany.com, the user must change the Address ID to SECONDARY on the Employee Maintenance window, *NOT* on Internet Information window.

When using Microsoft Outlook as your e-mail method, if the employee wants their Earnings Statement sent to multiple e-mail addresses, it is an option to enter both addresses into the e-mail field separated by a semi-colon. An example of this would be packerman@fabrikam.com;packerman@live.com.

E-Mail Suite Setup Window

Microsoft Dynamics GP > Tools > Setup > Payroll > E-Mail Suite Setup

Use the E-Mail Suite Setup window to complete the settings for E-Mail Earnings Statements. Use the Product Option drop-down list to select E-Mail Earnings Statements. This window also gives the user capability to enable or disable the selected product.

The screenshot shows the 'E-Mail Suite Setup' window. The 'Product Option' is set to 'E-Mail Earnings Statements'. The 'Activate' checkbox is checked. The 'E-Mail Method' is set to 'SMTP'. The 'Subject Line' is 'Direct Deposit Statement'. The 'Blind Carbon Copy' is empty. The 'E-Mail Body' contains the text: 'Attached is your direct deposit statement of earnings. Please contact the payroll department if you have any questions.' The 'SMTP Settings' section includes: 'Outgoing Server' (server name), 'Outgoing Port' (25), 'Authentication' (Basic), 'Application (Client) ID', 'Client Secret', 'Username' (fabrikam\administrator), 'Password' (masked), 'Reply-To Address' (payroll@fabrikam.com), 'Reply Name' (Payroll Supervisor), and a 'Verify SMTP' button. The 'Options' section includes: 'PDF Creation Method' (PDF Print Driver), 'Password' (Last 4 of SS Number), 'Employee PDF File Location' (C:\Program Files (x86)\Microsoft Dynamics\GP\Data\Email Statements\), and checkboxes for 'Include E-Mailed Earnings Statements when printing' and 'Archive E-Mailed Earnings Statements'. There are buttons for 'Missing E-Mail List' and 'Employee Exception List'. The window ends with 'OK' and 'Cancel' buttons.

Activate

Use the Activate checkbox to enable or disable the selected product. If the Activate checkbox is not marked the user will not be able to process E-Mail Earnings Statements.

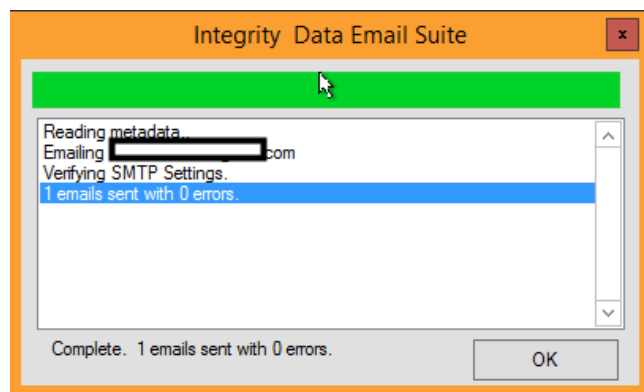
E-Mail Method

Use the E-Mail Method drop-down list to select the e-mail method. The options are Outlook or SMTP.

- If Outlook is selected the system will use the Microsoft Outlook profile as defined on the payroll user's machine.
- If SMTP is selected the user does not have to use a Microsoft Outlook account to send the e-mails. Rather, the system will connect directly to an SMTP server for sending e-mails. The user must complete the SMTP Settings section.

SMTP Settings

- Outgoing Server – specify the SMTP server the system will use to send the e-mails, this is a required field.
- Outgoing Port – specify the Port the system will use to send the e-mails, this is a required field. For SSL use port 587 and select the Enable SSL/TLS checkbox.
- Authentication – select the appropriate option from the drop-down list:
 - None – a user can connect to the SMTP server without credentials.
 - Current User – the system will use the credentials of the user currently logged into Windows to connect to the SMTP server.
 - Custom – the system will use the user name and password specified on the [E-Mail Suite Setup window](#) to connect to the server. If Custom is the option selected for Authentication, enter a Username and Password.
 - Microsoft OAuth – the system will use the credentials as defined in the Microsoft OAuth setup
 - Google OAuth – the system will use the credentials as defined in the Google OAuth setup
- Reply-To Address – enter an address that can be a general payroll e-mail account that is setup on the server, this is a required field.
- Reply Name – enter a name that can be a general name such as Payroll Administrator, this is a required field.
- Verify SMTP – Select to send a test email to the reply to address. If the SMTP settings are correct the email address in the Reply To Address will receive the test email and the Verify SMTP message will state successful. This is confirmed with the Integrity Data Email Suite progress window:



E-Mail Configuration section

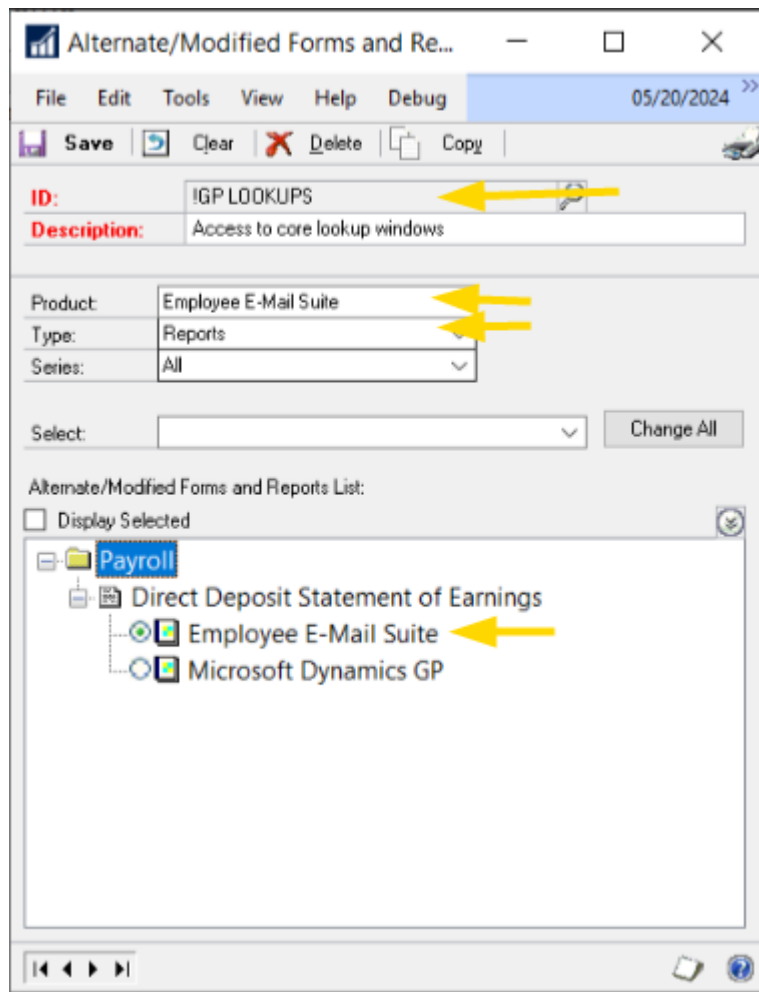
The system will generate an e-mail using the default profile settings in Microsoft Outlook or using the SMTP setup options on the [E-Mail Suite Setup window](#).

- Subject line – enter a subject for the e-mail not exceeding 100 characters, this is a required field.
- Blind Carbon Copy – enter a blind carbon copy if desired. This allows the user to keep a copy of the e-mail.
 - When using Microsoft Outlook as your E-Mail method, if there is a need to set multiple e-mail addresses, it is an option to enter both addresses into the Blind Carbon Copy field separated by a semi-colon. An example of this would be packerman@fabrikam.com;packerman@live.com.
- E-Mail Body – enter an e-mail body not exceeding 253 characters.

Here is a KB article on other considerations for Employee E-Mail Suite setup. [Employee Email Suite Setups considerations to improve processing speed - Integrity Data \(integrity-data.com\)](#)

Options

- PDF Creation Method – Decide what method will be used to create the PDFs to be sent.
 - PDF Print Driver – This will use the New ID PDF Manager print driver to create the PDFs without the use of Adobe.
 - Note: The Print Driver must first be installed from the installer found at Integrity-Data.com before this option can be used.
 - When using the Print Driver method it will be necessary to use the Alternate/Modified report for the Direct Deposit Statement of Earnings
 - Navigate to Tools>Setup>System>Alternate/Modified Forms and Reports
 - Select the correct Default ID
 - Select Product = Employee Email Suite
 - Select Type = Reports
 - Select Series = All
 - Click on the '+' beside Payroll
 - Select the '+' beside Direct Deposit Statement of Earnings
 - Select Employee Email Suite



- Alternatively, if there is already an existing modified report it will need to be further updated in report writer to add the Legend 1 field to the bottom of the report. This field will provide the file location to where the reports are created. See the short video on our resource center for detailed instructions.
- Adobe – This will use Adobe to create the PDFs.
- Password – the system will assign a password to the earnings statement PDF file attached to the e-mail. During the setup, the user needs to select one of the three options or create a custom password:
 - None – No password will be assigned to the attached earnings statement PDF file.
 - Last 4 of the Employee Social Security Number – The attached earnings statement PDF file will require the employee to enter in the last 4 digits of their Social Security Number to open the attachment.
 - First 5 of the Employee Social Security Number: The attached earnings statement PDF file will require the employee to enter in the first 5 digits of their Social Security Number to open the attachment.

If the user selects a password option within the E-Mail Suite Setup window, they must notify the employee a password will be required to view their e-mail earnings statements PDF file.

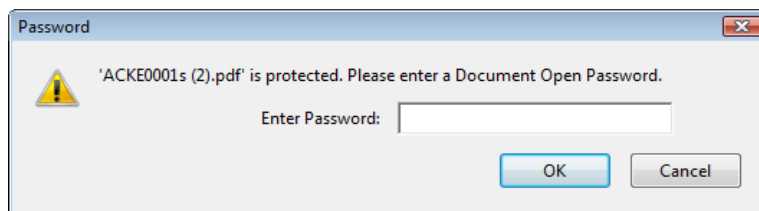
The user can assign a **custom** password for select employees or all employees by using the *Password Setup window*. For more details, see the [Password Setup window](#) section of the user documentation.

When notifying the employee of the password clarify which option has been selected within the password field on the E-Mail Earnings Statement window.

Tips on How to Notify Employees:

- Include the password notification in the e-mail body on the E-Mail Suite Setup Statement window.
- Notify employees prior to sending the e-mail earnings statements.

When the employee opens their E-Mail Earnings Statements PDF file, they will receive a password message asking them to enter their password. *This message does NOT inform the employee the Password option selected.*



Employee PDF File Location – the naming convention for the PDF file will be “XXXX.pdf”, where XXXX is defined as the employee ID. If an invalid path is entered, the system will display an error message stating, “Please select a valid PDF file location path.”

Include E-Mailed Earnings Statements when printing:

- Mark this checkbox if the user would like to have a printed copy of the e-mailed earnings statement. The system will print the e-mailed statements during the Print Earnings Statements process on the Post window.
- Unmark this checkbox if the user does not want the e-mailed earnings statements to print during the Print Earnings Statements process on the Post window.

Archive E-Mailed Earnings Statements:

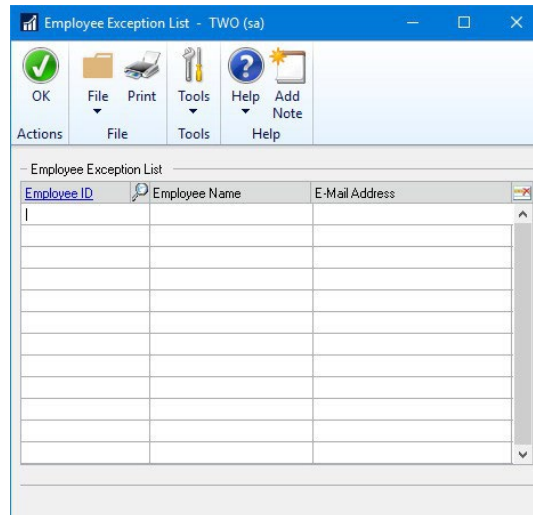
- Mark this checkbox if the user would like to have a copy of the e-mailed earnings statement PDF file saved. The system will create a folder with the Audit Trail Code as the label in the Employee PDF File Location. After sending the PDF Files the system will copy the PDF files into the Audit Trail Code folder before deleting the PDF files from the Employee PDF File Location.
- Unmark this checkbox if the user does not want to have a copy of the e-mailed earnings statements PDF file saved.

Missing E-Mail List Button

The Missing E-Mail List Button allows the user to print the Missing E-Mail List Report which contains the employees who do not have an E-Mail address associated the Address ID on the Employee Maintenance window. The employees on this list will not receive an E-Mail Earnings Statement.

Employee Exception List Button

The Employee Exception List button allows the user the ability to add employees to an exception list. If an employee decides they do not wish to receive e-mailed earnings statements then the user can enter the employee into the exceptions list window. Employees who are added to this list will NOT receive an e-mailed earnings statement.



Enter an Employee ID within the Employee Exception List scrolling window. If an Employee ID is entered into this window and the employee does not exist in the system, the user will be able to add the employee.

The Employee Name and E-Mail Address pre-fills from the Employee Maintenance window when an Employee ID is selected.

To delete an Employee ID from the exception list, select the Employee ID and then click the Delete Row button.

Select the window level printer icon to print the E-Mail Exceptions Report.

E-Mail Earnings Statements Reports

Missing E-Mail List Report

Microsoft Dynamics GP > Tools > Setup > Payroll > E-Mail Suite Setup > Missing E-Mail List

The user can print the Missing E-Mail List Report by selecting the Missing E-Mail List button on the E-Mail Suite Setup window. The Missing E-Mail List Report contains employees who do not have an e-mail address associated with the Address ID on the Employee Maintenance window.

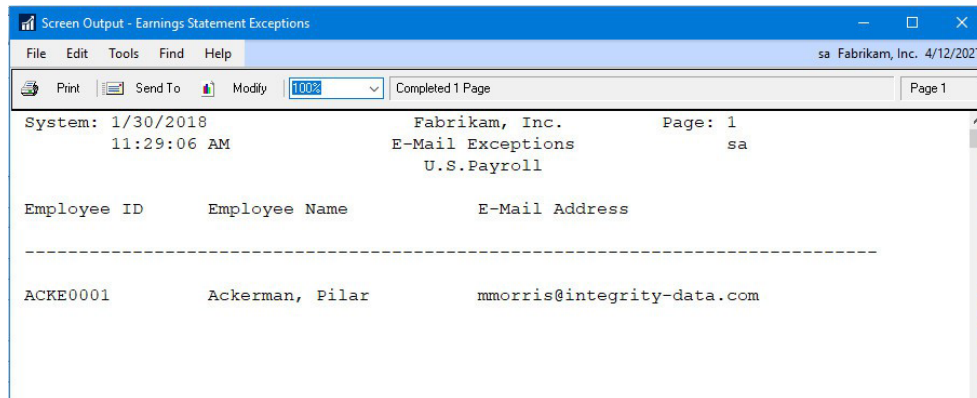
The user may use this report to verify the employees have an e-mail address assigned to the Address ID. If an Employee appears on this list, they do not have an e-mail address for the Address ID listed on the Employee Maintenance window. It is suggested that the payroll clerk prints this report before processing payroll.

Employee ID	Employee Name	Address Code
BARB0001	Barbariol, Angela	PRIMARY
BARR0001	Barr, Adam	PRIMARY
BONI0001	Bonifaz, Luis	PRIMARY
BUCH0001	Buchanan, Nancy	PRIMARY
CHEN0001	Chen, John Y.	PRIMARY
CLAY0001	Clayton, Jane	PRIMARY
DELA0001	Delaney, Aidan	PRIMARY
DIAZ0001	Diaz, Brenda	PRIMARY
DOYL0001	Doyle, Jenny	PRIMARY
ERIC0001	Erickson, Gregory J.	PRIMARY
FLOO0001	Flood, Kathie	PRIMARY
HARU0001	Harui, Roger	PRIMARY

E-Mail Exceptions Report

Microsoft Dynamics GP > Tools > Setup > Payroll > E-Mail Suite Setup > Employee Exception List

The user can print the E-Mail Exceptions Report by selecting the Employee Exception List button on the E-Mail Suite Setup window. This report contains the Employee ID, Employee Name and E-Mail Address for the employees who have been added to the Employee Exceptions List. Employees who are on this report will NOT receive an e-mailed earnings statement.

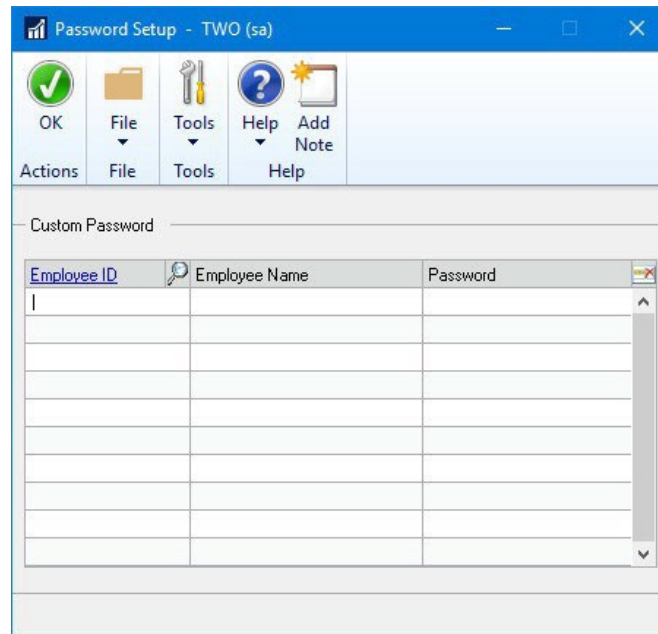


Employee ID	Employee Name	E-Mail Address
ACKE0001	Ackerman, Pilar	mmorris@integrity-data.com

Password Setup

Microsoft Dynamics GP > Tools > Setup > Payroll > E-Mail Suite Setup > Expand button

The user can setup custom passwords for a select few employees or all employees. To access the Password Setup window select the expand button to the right of the Password field on the E-Mail Suite Setup window. If an employee is listed in the Password Setup window, the system will override the option selected for the Password in the drop-down list on the E-Mail Suite Setup window. When the user has E-Mail W-2 Statements and E-Mail Earnings Statements registered, the custom password will be the same across both products.



Employee ID	Employee Name	Password
I		

Select an Employee ID from the lookup or enter an Employee ID in the Custom Password scrolling window. The Employee Name pre-fills from the Employee Maintenance window.

If an Employee ID is entered into this window, which does not yet exist in the system, the user will be able to add the employee.

To delete an Employee ID from the exception list, select the Employee ID and then click the Delete Row button.

Enter a Password not exceeding 15 characters.

E-Mail Earnings Statements Process

Transactions > Payroll > Email Earnings Statements

Once the Post process during payroll has been completed, open the E-Mail Earnings Statements window. The user will select the payroll build and then the system will display the earnings statement details for the build. The user can then mark all or select which employee's need to be e-mailed.

IMPORTANT: Do not set the Employee PDF File Location on the E-Mail Suite Setup window to this folder. The files included in this folder (C:\Program Files (x86)\Microsoft Dynamics\GP2018\Data\EES) will be sent to **ALL** employees!

The system will prevent a user from running a Payroll if E-Mail Earnings Statements are being processed. The system will prevent a user from processing E-Mail Earnings Statements if a Payroll is in process.

If the user has additional company-wide PDF files to send with the employee's e-mail earnings statements, they can include the file(s) in the EES folder located in the C:\Program Files (x86)\Microsoft Dynamics\GP2018\Data folder. These files will be attached to the employee's e-mail and sent to *ALL employees*.

Sending Employee Specific attachments

If the user has employee specific files to send, such as a time sheet, with the employee's e-mail earnings statements, they can include the file(s) in the Employee folder located in the C:\Program Files (x86)\Microsoft Dynamics\GP2018\Data\EES folder. The system will only send a file to an employee if the file is named with the employee ID followed by two single quotes. For example, if an Excel document was named ACKE0001" Timesheet.xlsx and saved in the \Data\EES\Employee folder when the system sends ACKE0001 their earnings statement the system will send this Excel document.

[illegible]

Build Information Scrolling window – displays the Created By user, Audit Control number, Check Date, Build ID and Gross Wages. Select the batch you wish to process and the employees will display in the Employee Detail Scrolling window.

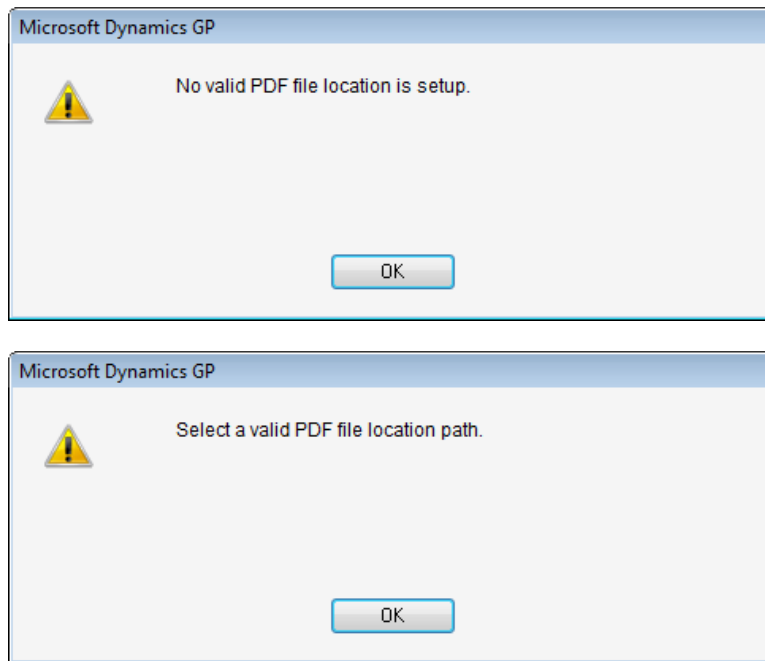
Restrictions – enables the user to restrict the Employee Detail Scrolling window by Employee, Employee Class, Department and Division.

Employee Detail Scrolling window – displays the employees from a specific build, which would receive e-mail earnings statements. The payroll clerk selects the employees who are to receive the e-mail earnings statements.

The system will leverage the existing Adobe Acrobat Writer software on the local machine to create the PDF files. If a user receives an Adobe error message while processing e-mail earnings statements they will need to contact Adobe directly to troubleshoot the error message.

PDF File Location

The system will confirm whether the value for the PDF file location path as defined in E-Mail Suite Setup window represents a valid path for the current machine. If the path is invalid, the system will display a warning and prevent the user from continuing the E-Mail Earnings Statements process until a valid path is specified.



If the user receives an invalid PDF file location path error message, select ok. Then open the E-Mail Suite Setup window.

Select a valid PDF file location and then click OK on the E-Mail Suite Setup window.

Reselect the Employee ID(s) on the E-Mail Earnings Statements window and click Process.

A PDF will be generated for each employee's earnings statement.

Create E-Mail Earnings History

Microsoft Dynamics GP > Tools > Utilities > Payroll > Create E-Mail Earnings History

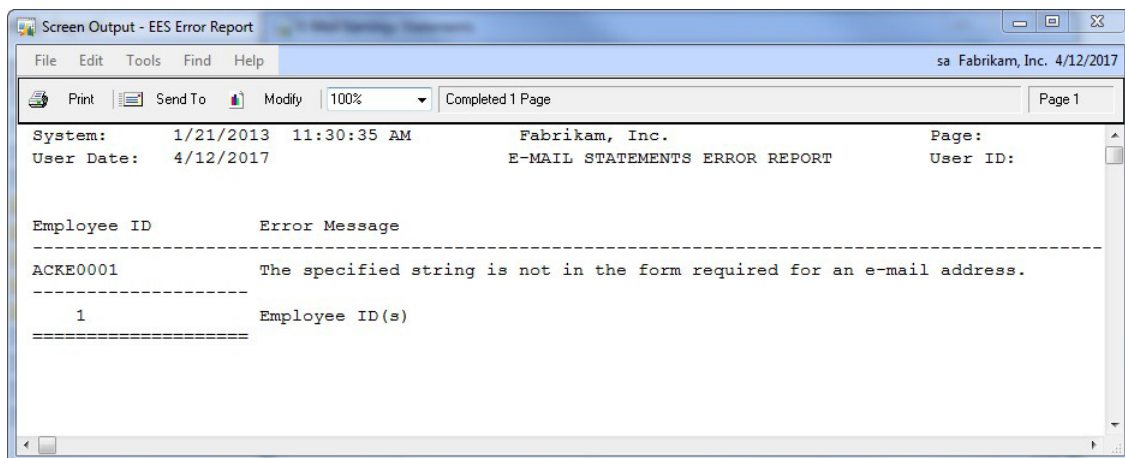
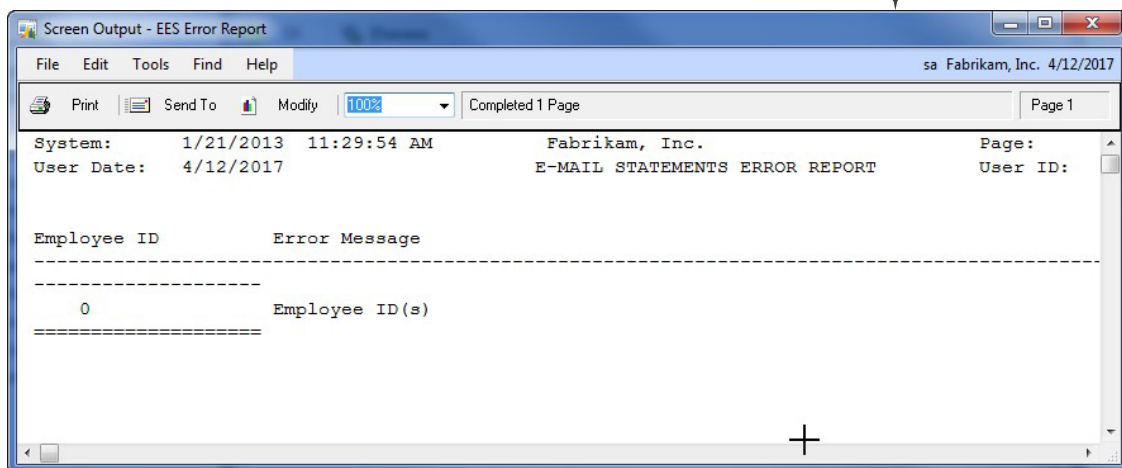
The Create E-Mail Earnings History utility is primarily used to allow the user to send emailed earning statements to employees for payruns that occurred prior to Email Suite being installed, while it was disabled or as a result of posting interruptions. The system will “import” these payruns and make them visible on the Email Earnings Statements window, when the user selects the audit trail code and then clicks the process button. It is recommended that in the case of multiple missing audit trail codes that they be imported one at a time. Once imported, the user can email those past payrolls to employees normally via the Email Earnings statement window. Please note: only employees, which are setup with Direct Deposit and have an email address on the Internet Information window will be included in the imported payrun

	Created By	Audit Trail Code	Gross Wages	Check Date	Posting Date	
☐	sa	UPRCC00000004	\$29,509.91	2/1/2024	2/1/2024	⌵
☐	sa	UPRCC00000005	\$29,910.55	3/1/2024	3/1/2024	
☐	sa	UPRCC00000006	\$27,802.37	4/1/2024	4/1/2024	
☐	sa	UPRCC00000007	\$29,605.14	5/1/2024	5/1/2024	
☐	sa	UPRCC00000008	\$29,665.28	6/1/2024	6/1/2024	
☐	sa	UPRCC00000009	\$29,201.67	7/1/2024	7/1/2024	
☐	sa	UPRCC00000010	\$29,031.84	8/1/2024	8/1/2024	
☐	sa	UPRCC00000011	\$29,910.55	9/1/2024	9/1/2024	
☐	sa	UPRCC00000012	\$29,506.24	10/1/2024	10/1/2024	
☐	sa	UPRCC00000013	\$28,422.44	11/1/2024	11/1/2024	
☐	sa	UPRCC00000014	\$29,500.48	12/1/2024	12/1/2024	
☐	sa	UPRCC00000015	\$29,458.73	1/1/2025	1/1/2025	⌶

E-Mail Statements Error Report

The system will generate a report after processing the earnings statements. The report will specify if there was an error or if the system sent the e-mails successfully. *Only errors reported back to Microsoft Dynamics GP will be included on the report.* The report contains the Employee ID and Error Message.

Depending on the number of statements the user is trying to e-mail and the speed of the system processing the e-mail, the process may run for an extended period of time.



The user will need to manually track errors such as returned e-mails within Microsoft Outlook from the system that processed the E-Mailed Earnings Statements. This information can then be updated in Microsoft Dynamics GP and the statements can be resent from the E-Mail Earnings Statements window.

Introduction to E-Mail W-2 Statements

Organizations are increasingly moving towards electronic communication. A new benefit a company can implement is the option to receive the Form W-2 electronically.

The E-Mail W-2s product:

- Provides access to W-2 statements earlier than traditional mail;
- Greatly reduces the chance that a W-2 statement will get lost, misdirected or delayed during delivery or misplaced after the employee receives it;
- Ensures employees can receive W-2 statements even while traveling or away from their mailing address;
- Allows employees to retrieve their W-2 statements at any time of day and on weekends;
- Allows employees to print multiple copies of their W-2 statement and
- Helps employees contribute to their employer's cost savings (forms, printing and postage expenses).

The system will allow the user to:

- Specify setup options for employees to receive e-mail W-2 statements;
- Generate individual W-2 statements for employees;
- E-Mail W-2 statements to employees and
- Archive W-2 statements for employees.

The user will complete the following setup options:

- E-Mail Configuration information
 - E-Mail Method
 - Subject Line
 - Blind Carbon Copy
 - E-Mail Body
 - Password
 - Employee PDF file location
 - Employer PDF file location
 - Enable archiving for W-2s
- Manage W-2 Recipients

- Employee ID
- Employee Name
- Alternate E-Mail Address
- E-Mail W-2

E-Mail W-2 statements will process if the following conditions are met:

- The Employee E-Mail Suite is installed and registered.
- The user has selected the Activate E-Mail W-2 Statements option.
- The employee has an e-mail address assigned on the [Internet Information window](#).
- The employee is marked to receive an e-mail on the [Manage W-2 Recipients window](#).
- The system has at least one Year-End Wage File.

E-Mail W-2 statements will process in the following order:

- Perform a pre-check operation.
- Create a distinct W-2 statement for each employee designated to receive e-mail W-2s.
- Generate the W-2 form as a password protected PDF file.
- E-Mail the W-2's to employees who are setup to receive them.

Timeline for Electronic W-2 Statement Delivery

Please note that employers must furnish electronic Forms W-2 by the same due date as paper Forms W-2. For more information on furnishing Form W-2 to employees electronically, see Regulations section 31.6051-1(j).

Regulations Surrounding Electronic Delivery of W-2 Statements

E-Mail W-2 statements for Microsoft Dynamics GP creates Electronic W-2s according to the requirements set forth in IRS Publication 1141 Section 2, titled, *Requirements for Substitute Forms Furnished to Employees (copies B, C, and 2)*.

According to IRS Publication 15a, *Employers Supplemental Tax Guide*, in order to e-mail W-2 Statements:

- Each employee participating must consent electronically (or receive confirmation of any consent made using a paper document);
- Employers must notify employees of all hardware and software requirements to receive the forms;
- Employers may not send a Form W-2 electronically to any employee who does not consent or who has revoked consent previously provided; and
- Employers must meet the following disclosure requirements and provide a clear and conspicuous statement of each of them to employees:

1. The employee must be informed that he or she may receive a paper Form W-2 if consent is not given to receive it electronically.
2. The employee must be informed of the scope and duration of the consent.
3. The employee must be informed of any procedure for obtaining a paper copy of any Form W-2 (and whether or not the request for a paper statement is treated as a withdrawal of his or her consent) after giving consent.
4. The employee must be notified about how to withdraw consent and the effective date and manner by which the employer will confirm the withdrawn consent. The employee must also be notified that the withdrawn consent does not apply to the previously issued Forms W-2.
5. The employee must be informed about any conditions under which electronic Forms W-2 will no longer be furnished (for example, termination of employment).
6. The employee must be informed of any procedures for updating his or her contact information that enables the employer to provide electronic Forms W-2.
7. The employer must notify the employee of any changes to the employer's contact information.

E-Mail Suite Setup Window

Microsoft Dynamics GP > Tools > Setup > Payroll > E-Mail Suite Setup

Use the E-Mail Suite Setup window to complete the settings for E-Mail W-2 Statements. Use the Product Option drop-down list to select E-Mail W-2 Statements option. This window also gives the user capability to activate or inactivate the selected product.

The screenshot shows the 'E-Mail Suite Setup - TWO18 (sa)' window. The 'Product Option' dropdown is set to 'E-Mail W-2 Statements'. The 'Activate' checkbox is checked. The 'E-Mail Method' is set to 'Outlook'. The 'Subject Line' is 'Attached is W2'. The 'Blind Carbon Copy' checkbox is unchecked. The 'E-Mail Body' is a large text area. The 'SMTP Settings' section includes fields for 'Outgoing Server', 'Outgoing Port' (25), 'Authentication' (None), 'Application (Client) ID', 'Client Secret', 'Username', 'Password', 'Reply-To Address', 'Reply Name', and a 'Verify SMTP' button. The 'Options' section includes 'PDF Creation Method' (PDF Print Driver), 'Password' (None), 'Employee PDF File Location' (C:\Users\JLester\Documents\), 'Employer PDF File Location' (C:\Users\JLester\Desktop\), and a checked 'Archive W-2's' checkbox. There are buttons for 'Missing E-Mail List' and 'Manage W-2 Recipients'.

Activate

Use the Activate checkbox to enable or disable the selected product. If the Activate checkbox is not marked, the user will not be able to process E-Mail W-2 Statements.

E-Mail Method

Use the E-Mail Method drop-down list to select the E-Mail method. The options are Outlook and SMTP.

- If Outlook is selected the system will use the Microsoft Outlook profile as defined on the payroll user's machine.
- If SMTP is selected the system will not use the Outlook profile as defined on the payroll user's machine to send the E-Mails. The system will connect directly to an SMTP server for sending E-Mails. The user must complete the SMTP Settings fields. For SSL use port 587 and select the Enable SSL/TLS checkbox.

SMTP Settings

- Outgoing Server – specify the SMTP server the system will use to send the E-Mails, this is a required field.
- Outgoing Port – specify the port the system will use to send the E-Mails, this is a required field.
- Authentication – select the appropriate option from the drop-down list.
- None – a user can connect to the SMTP server without credentials.
- Current User – the system will use the credentials of the user currently logged into Windows to connect to the SMTP server.
- Custom – the system will use the user name and password specified on the E-Mail Suite setup window to connect to the server. If Custom is the option selected for authentication, enter a username and password.
- Reply-To Address – enter an address which can be a general payroll e-mail account which is setup on the server, this is a required field.
- Reply Name – enter a name that can be a general name such as payroll administrator, this is a required field.
- Verify SMTP – Select to send a test email to the reply to address. If the SMTP settings are correct the email address in the Reply To Address will receive the test email and the Verify SMTP message will state successful.

E-Mail Configuration section

The system will generate an e-mail using the default profile settings in Microsoft Outlook or the SMTP Settings on the [E-Mail Suite Setup window](#).

- Subject Line – enter a Subject Line not exceeding 100 characters; this is a required field.
- Blind Carbon Copy – enter a Blind Carbon Copy if desired. This allows the user to keep a copy of the e-mail to resend, if necessary.
- E-Mail Body – enter an e-mail body not exceeding 253 characters.

Options

- PDF Creation Method – Decide what method will be used to create the PDFs to be sent.
 - PDF Print Driver – This will use the New ID PDF Manager print driver to create the PDFs without the use of Adobe.
 - Note: The Print Driver must first be installed from the installer found at Integrity-Data.com before this option can be used.
 - Adobe – This will use Adobe to create the PDFs.
- Password – the system will assign a password to the W-2 Statement PDF file attached to the e-mail.

During the setup, the user needs to select one of the three options or create a custom password:

- None – No password will be assigned to the attached W-2 Statement PDF file.
- Last 4 of the Employee Social Security Number – The attached W-2 Statement PDF file will require the employee to enter in the last 4 digits of his or her Social Security Number to open the W-2 Statement PDF file.
- First 5 of the Employee Social Security Number – The attached W-2 Statement PDF file will require the employee to enter in the first 5 digits of his or her Social Security Number to open the W-2 Statement PDF file.
- Custom: The user can assign a custom password for select employees or all employees by using the [Password Setup window](#). For more details see the Password Setup window section of this user documentation.

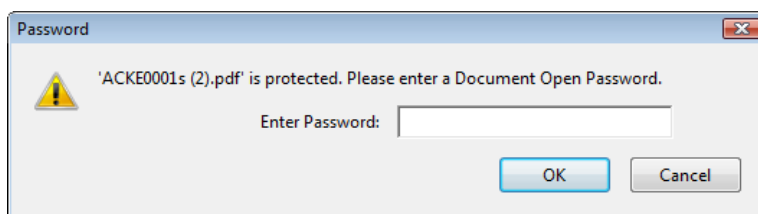
When the user has E-Mail W-2 Statements and E-Mail Earnings Statements registered, the custom password will be the same for both products.

If the user selects a password option within the E-Mail Suite Setup window, he must notify the employee a password will be required to view his e-mail W-2 Statement PDF file. When notifying the employee of the password, clarify which option has been selected within the Password field on the E-Mail Suite Setup window.

Tips on How to Notify Employees:

- Include the password notification in the E-Mail body on the E-Mail Suite Setup Statement window.
- Notify employees prior to sending the E-Mail W-2 Statements.

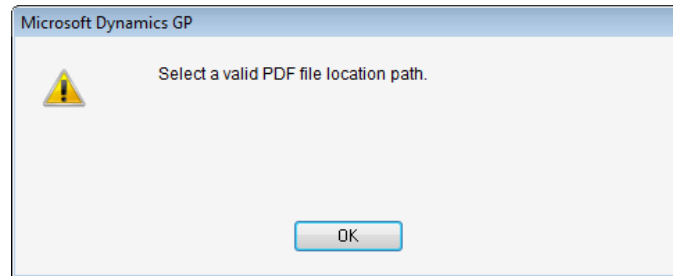
When the employee opens the E-Mail W-2 Statements PDF file, the system will prompt a password message asking to enter the password. *This message does NOT inform the employee which password option was used to protect the document.*



- Employee PDF File Location – the naming convention for the PDF file will be “XXXX-Copy-W2.pdf”, where XXXX is defined as the Employee ID. This file will contain the forms that were selected in the Options section on the E-Mail W-2 Statements window. If an invalid path is entered, the system will display an error message:

It is best practice to empty the PDF file location once the e-mails have been sent. The user may select the archive option to store the PDF W-2 Statements. Clearing out this PDF file location will prevent the previous W-2 Statements from being unintentionally sent again the following year.

- Employer PDF File Location – the naming convention for the PDF file will be “XXXX-W2.pdf”, where XXXX is defined as the Year. If an invalid path is entered, the system will display an error message:



Archive W-2's

Use the Archive W-2's checkbox to automatically create an archive folder for the selected year on the E-Mail W-2 Statements window. The folder will be created in the Employee PDF file location. This folder will contain the most current PDF file for the selected year.

Missing E-Mail List Button

The Missing E-Mail List Button allows the user to print the Missing E-Mail List Report which contains the employees who do not have an e-mail address associated the Address ID on the Employee Maintenance window. The employees on this list will not receive an E-Mail W-2 Statement.

Manage W-2 Recipients

The Manage W-2 Recipients button opens the Manage W-2 Recipients window and allows the user to select which employees are to receive the e-mailed W-2 Statements. If the user has received permission from an employee to e-mail the W-2 statement, the user will mark the E-Mail W-2 checkbox. If the user has NOT received permission from an employee to e-mail the W-2 statement, the user will NOT mark the E-Mail W-2 checkbox.

Employee ID	Employee Name	Alternate E-Mail Address	E-Mail W-2
ACKE0001	Ackerman, Pilar		☐
BARB0001	Barbariol, Angela		☐
BARR0001	Barr, Adam		☐
BONI0001	Bonifaz, Luis		☐
BUCH0001	Buchanan, Nancy		☐
CHEN0001	Chen, John Y.		☐
CLAY0001	Clayton, Jane		☐
DELA0001	Delaney, Aidan		☐
DIAZ0001	Diaz, Brenda		☐
DOYL0001	Doyle, Jenny		☐
ERIC0001	Erickson, Gregory J.		☐

The user has three options to populate the scrolling window with employees:

1. Click the Redisplay button to populate the scrolling window with ALL employees.
2. Use the Restrictions to define by Employee ID, Employee Class, and/or Department. You can also display only active or inactive employees. You can also exclude employees who do not have an email address in the Internet Information window.
3. Enter or select an Employee ID within the Employee ID field.

The Employee Name pre-fills from the Employee Maintenance window.

The Alternate E-Mail Address field allows the user to enter an alternate e-mail address for the employee.

Use E-Mail W-2 checkbox to select which employees are to receive the E-Mailed W-2 Statement.

Select the window level printer icon to print the E-Mail W-2 Recipients Report.

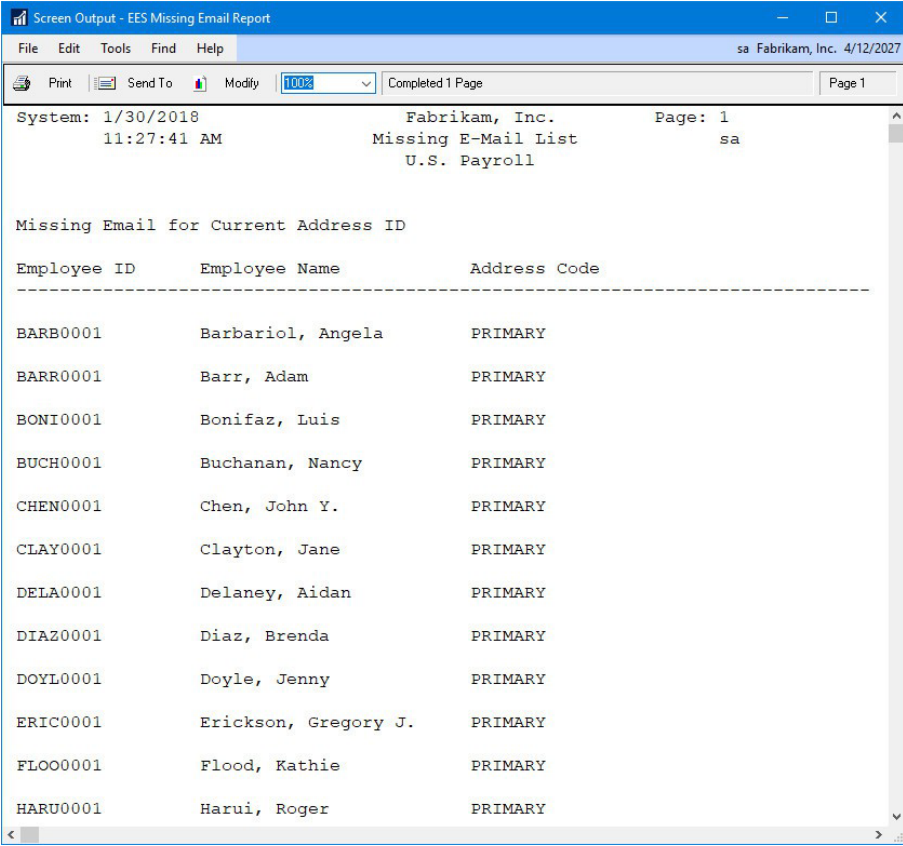
E-Mail W-2 Statement Reports

Missing E-Mail List Report

Microsoft Dynamics GP > Tools > Setup > Payroll > E-Mail Suite Setup > Missing E-Mail List

The user can print the Missing E-Mail List Report by selecting the Missing E-Mail List button on the E-Mail Suite Setup window. The Missing E-Mail List Report contains employees who do not have an e-mail address associated with the Address ID on the Employee Maintenance window.

The user may utilize this report to verify the employee has an e-mail address assigned to the Address ID. If an employee appears on this list, they do not have an e-mail address for the Address ID listed on the Employee Maintenance window. It is suggested that the user prints this report before processing the W-2 Statements.



Employee ID	Employee Name	Address Code
BARB0001	Barbariol, Angela	PRIMARY
BARR0001	Barr, Adam	PRIMARY
BONI0001	Bonifaz, Luis	PRIMARY
BUCH0001	Buchanan, Nancy	PRIMARY
CHEN0001	Chen, John Y.	PRIMARY
CLAY0001	Clayton, Jane	PRIMARY
DELA0001	Delaney, Aidan	PRIMARY
DIAZ0001	Diaz, Brenda	PRIMARY
DOYL0001	Doyle, Jenny	PRIMARY
ERIC0001	Erickson, Gregory J.	PRIMARY
FLOO0001	Flood, Kathie	PRIMARY
HARU0001	Harui, Roger	PRIMARY

E-Mail W-2 Recipients Report

Cards > Payroll > Manage W-2 Recipients

The user can print the E-Mail W-2 Recipients Report by selecting the window level printer icon on the Manage W-2 Recipients window. The E-Mail W-2 Recipients Report contains the details from the Manage W-2 Recipients window.

The user may utilize this report to verify that all employees who elected to have the E-Mail W-2 Statement e-mailed to them have the E-Mail W-2 checkbox marked. It is suggested that the user prints this report before sending the E-Mail W-2 Statements.

Screen Output - E-Mail W2 Recipients					
File Edit Tools Find Help					
sa Fabrikam, Inc. 4/12/2027					
Print Send To Modify 000% Completed 1 Page Page 1					
System: 1/30/2018 2:46:59 PM			Fabrikam, Inc.		Page: 1
User Date: 4/12/2027			E-Mail W-2 Recipients		User ID: sa
Employee ID	Last Name	First Name	Middle Name	E-Mail W-2	E-Mail Address
ACKE0001	Ackerman	Pilar		X	mmorris@integrity-data.com
BARB0001	Barbariol	Angela		X	
BARR0001	Barr	Adam		X	
BONI0001	Bonifaz	Luis		X	
BUCH0001	Buchanan	Nancy		X	
CHEN0001	Chen	John	Y.	X	
CLAY0001	Clayton	Jane		X	
DELA0001	Delaney	Aidan		X	
DIAZ0001	Diaz	Brenda		X	
DOYL0001	Doyle	Jenny		X	
ERIC0001	Erickson	Gregory	J.	X	
FLOO0001	Flood	Kathie		X	
HARU0001	Harui	Roger		X	
JAMI0001	Jamison	Jay		X	
KAHN0001	Kahn	Wendy	Beth	X	
KENN0001	Kennedy	Kevin		X	
LEVY0001	Levy	Steven	B.	X	
LYON0001	Lyon	Robert		X	
LYSA0001	Lysaker	Jenny		X	
MART0001	Martinez	Sandra	I.	X	
MUGH0001	Mughal	Salmon		X	
NAGA0001	Nagata	Suanne		X	
PHIL0001	Philips	Carol		X	
REEV0001	Reeves	Randy		X	
STEW0001	Stewart	Jim		X	
TIAN0001	Tiano	Mike		X	
TIBB0001	Tibbott	Diane		X	
WEST0001	West	Paul		X	
YOUN0001	Young	Rob		X	

E-Mail W-2 Statements Window

Microsoft Dynamics GP > Tools > Routines > Payroll > E-Mail W-2 Statements

The user will have the ability to e-mail W-2 Copy B, W-2 Copy C and W-2 Copy 2 Forms for a specific year-end wage file. The system will display the employees who will receive an E-Mail W-2 Statement within the scrolling window.

If the user has additional company-wide PDF files to send with the employee's E-Mail W-2 Statement, they can include the PDF file(s) in the W2-Attach folder located in the C:\Program Files (x86)\Microsoft Dynamics\GP2018\Data folder. These files will be attached to the employee's email and sent to *ALL employees*.

The E-Mail W-2 Statements product automatically places the W-2 Instruction File.pdf file in the W2-Attach folder. Once the system sends the e-mail, the W-2 Instructions.pdf file will be attached to the e-mail along with the W-2 Form(s).

IMPORTANT: Do not set the Employee PDF File Location on the E-Mail Suite Setup window to this folder. The files included in this folder (C:\Program Files (x86)\Microsoft Dynamics\GP2018\Data\W2-Attach) will be sent to ALL employees!

Employee ID	Employee Name	E-Mail Address
ACE0001	Ackerman, Pilar	ackerman@wilmet.com
BARB0001	Barbariol, Angela	
BARR0001	Barr, Adam	
BONI0001	Bonifaz, Luis	
BUCH0001	Buchanan, Nancy	
CHEN0001	Chen, John Y.	
CLAY0001	Clayton, Jane	
DELA0001	Delaney, Aidan	
DIAZ0001	Diaz, Brenda	

29 Records

Year – select the year for which W-2s will be printed. The drop-down list is populated with the same years that are available to the system from the Print W-2s form process. The W-2 report is now automatically updated with the year from the Year Drop Down list. If the IRS releases a substantially different W-2 form for a given year then an

update to Email Earning Statement will be needed. Contact Integrity Data for more information. Also, you can make sure your instructions are up to date by downloading the latest ones from the link provided next to the Year Drop Down List. "Get W-2 instructions online". This will take you to an Integrity Data site populated with the most recent file as well as instructions on what to do with it.

Company, Address ID, Address, City, State, ZIP Code – displays from the Company Setup window. The user may change the Address ID if needed.

Subject Line – displays from the E-Mail Suite Setup window. If a change is needed to the Subject Line, select the E-Mail Setup button to open the E-Mail Suite Setup window.

E-Mail Body – displays from the E-Mail Suite Setup window. If a change is needed to the E-Mail Body, select the E-Mail Setup button to open the E-Mail Suite Setup window.

Blind Carbon Copy – displays the Blind Carbon Copy specified on the E-Mail Suite Setup window. If a change is needed to the Blind Carbon Copy field, select the E-Mail Setup button.

Employer Identification Number – displays the company's employer ID for which wages were reported during the year. This number is assigned by the federal government and is the number entered using the Payroll Tax Identification Setup window. Changes may be made, if necessary.

Options – when the user processes E-Mail W-2 Statements, they have the option to create one PDF file which contains only the e-mailed W-2 Statements or create one PDF file which includes both the e-mailed W-2 Statements and the hardcopy W-2 Statements.

Save an employer copy – mark this checkbox to create one employer copy PDF file for the employees receiving E-Mail W-2 Statements. Marking this checkbox enables the "Include printed W-2 employees" checkbox.

Include printed W-2 employees – mark this checkbox to create one employer copy PDF file including all employees receiving a W-2 Statement via e-mail or hardcopy.

Forms – allows the user to select which W-2 forms will be processed during the E-Mail W-2 Statements process.

- W-2 Copy B
- W-2 Copy C
- W-2 Copy 2

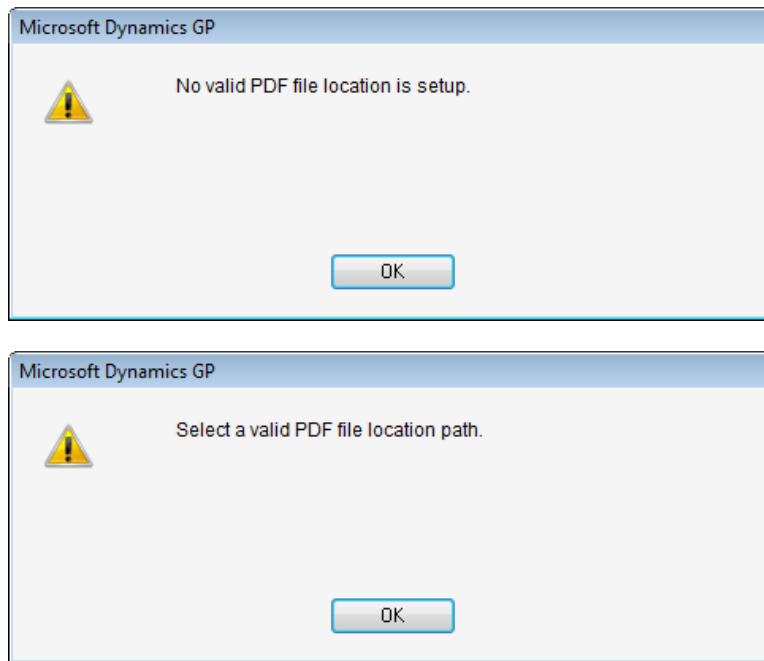
Employee Detail Scrolling window – displays all the employees or the specified employees from the From/To fields. The Employee ID, Employee Name and E-Mail Address displays from the Employee Maintenance window or the Manage W-2 Recipients window.

E-Mail W-2 Statements Process

When the user selects the Process button, the system will leverage the existing Adobe Acrobat Writer software on the local machine to create the PDF files. If a user receives an Adobe error message while processing E-Mail W-2 Statements they will need to contact Adobe directly to troubleshoot the error message.

PDF File Location

The system will confirm whether the value for the PDF File Location path as defined in E-Mail Suite Setup window represents a valid path for the current machine. If the path is invalid, the system will display a warning and prevent the user from continuing the E-Mail W-2 Statements process until a valid path is specified.



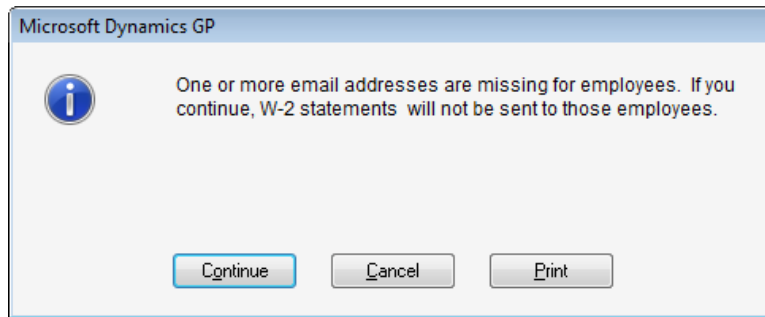
If the user receives an invalid PDF file location path error message, select ok. Then open the E-Mail Suite Setup window.

1. Select a valid PDF file location and then click OK on the E-Mail Suite Setup window.
2. Reselect the Process button on the E-Mail W-2 Statements window.

A PDF will be generated for each employee's W-2 statement and placed in the directory specified in E-Mail Suite Setup window. The PDF will remain in this directory until removed or overwritten when the E-Mail W-2 Statements is processed again the following year. It is best practice to clear this out when finished for the year. You can always archive them using the archive feature for future reference.

E-Mail Validation

The system will confirm that each employee has a valid e-mail address. If one or more e-mail addresses are missing for an employee, the system will prompt message, "One or more email addresses are missing for employees. If you continue, W-2 statements will not be sent to those employees." The user may choose Continue, Cancel or Print.



Click Continue to proceed with the E-Mail W-2 Statement process. Keeping in mind that the E-Mail W-2 Statements cannot be sent to the employee who does NOT have an e-mail address; however, if a blind carbon copy is setup for this employee, the file will be sent to the e-mail address specified in the blind carbon copy field.

Click Cancel to close the message and the user may update the employee e-mail address.

Click Print to print the Missing E-Mail List Report. The user may utilize this report to update the employee e-mail address.

E-Mail Statements Error Report

The system will generate an E-Mail Statements Error Report after processing the E-Mail W-2 Statements. The report will specify if there was an error or if the system sent the e-mails successfully. *Only errors reported back to Microsoft Dynamics GP will be included on the report.* The report contains the Employee ID and Error Message.

Depending on the number of W-2 forms the user is trying to e-mail and the speed of the system processing the e-mail, the process may run for an extended period of time.

Screen Output - EES Error Report

File Edit Tools Find Help sa Fabrikam, Inc. 4/12/2017

Print Send To Modify 100% Completed 1 Page Page 1

System: 1/21/2013 11:29:54 AM Fabrikam, Inc. Page:
User Date: 4/12/2017 E-MAIL STATEMENTS ERROR REPORT User ID:

Employee ID	Error Message
0	Employee ID(s)

Screen Output - EES Error Report

File Edit Tools Find Help sa Fabrikam, Inc. 4/12/2017

Print Send To Modify 100% Completed 1 Page Page 1

System: 1/21/2013 11:30:35 AM Fabrikam, Inc. Page:
User Date: 4/12/2017 E-MAIL STATEMENTS ERROR REPORT User ID:

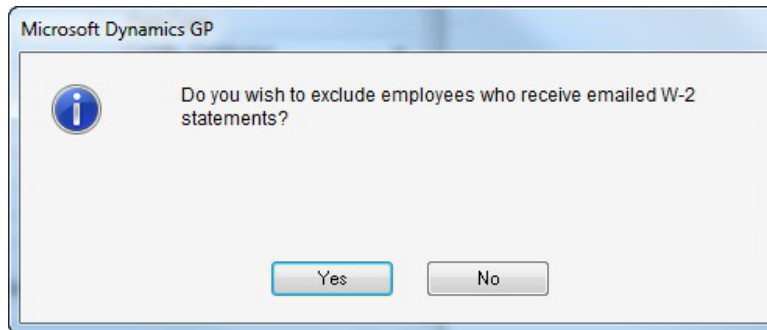
Employee ID	Error Message
ACKE0001	The specified string is not in the form required for an e-mail address.
1	Employee ID(s)

The user will need to manually track errors such as returned e-mails within the system that processed the E-Mailed W-2 Statements. This information can then be updated in Microsoft Dynamics GP and the W-2 forms can be reprocessed from the E-Mail W-2 Statements window.

Print W-2 Statements Window

Microsoft Dynamics GP > Tools > Routines > Payroll > Print W-2s

The user will be able to print the W-2 statements before or after e-mailing the W-2 statements. The system will allow the user to decide to either print all W-2 statements or print only the employees who elected to not receive an e-mail W-2 statement. Once the user selects the print button on the Print W-2 Forms window the system will prompt message, “Do you wish to exclude employees who receive emailed W-2 statements?” The user may choose Yes or No.



Click No to print all employees including the ones who elected to receive an E-Mail W-2 Statement.

Click Yes to print only employees who elected to receive a printed W-2 Statement.

Sample Employee E-Mail and PDF Consent Form

Sample E-Mail

The following e-mail is an example only and uses the disclosure requirements set forth in IRS Publication 15a and Treasury Regulations Sub Chapter C. Sec 31.6051-1(j).

Email Subject: IMPORTANT TAX RETURN DOCUMENT AVAILABLE

Email Body:

Fabrikam is pleased to offer W-2 statements via e-mail this year instead of the traditional paper copy! Benefits to receiving your W-2 by e-mail are:

(List all benefits – link to list of benefits below).

Please read the attached PDF file for instructions on how to consent to this process and for important information regarding electronic delivery of your W-2. If you are unable to read the attached PDF file, please contact ... or download ... (with link)

You may decline the electronic W-2 and continue to receive a paper copy of your W-2 by either not replying or by replying and stating:

“I do not want to receive my W-2 electronically.”

Sample PDF Consent Form

The following text is an example only for a PDF consent form.

If you would like to receive your W-2 by e-mail, you must reply to this message and place the following text in your reply:

“I agree to accept my W-2 statement electronically at this e-mail address.” (Or, you may specify a different e-mail address).

You may decline the electronic W-2 and continue to receive a paper copy of your W-2 by either not replying or by replying and stating:

“I do not want to receive my W-2 electronically.”

Please note you will receive a paper copy of your W-2 unless you specify differently prior to 01/15/2016. Consent is for one year only and consent will be required again next year.

You may revoke your consent for an electronic W-2 delivery prior to January 15, 2016 by contacting the payroll department at w2consent@fabrikam.com or at 555-555-5555, ext. 555. Withdrawing consent by January 15, 2016 will be for this year only and does not apply to any W-2 documents you have already received.

Conditions under which W-2s will no longer be furnished electronically may include:

(List all reasons - for example, termination of employment).

E-Mail addresses used for electronic delivery may be changed prior to January 15, 2065 by contacting the payroll department at w2consent@fabrikam.com or at 555-555-5555, ext. 555.

When you receive your W-2 electronically, it will be attached to an e-mail as a PDF file – much like the one you are currently reading. You will need PDF reading software (such as Adobe Acrobat Reader) and the hardware necessary to run the PDF reader software. If you are reading this on your own computer after having opened this attached via your e-mail then you meet the hardware and software requirements for receiving your electronic W-2.

Hints, Essentials and FAQs

What are the system requirements Employee E-Mail Suite?

1. Microsoft Dynamics GP Payroll
2. Direct Deposit must be registered, setup and active
3. .NET Framework 4.8
4. Adobe Acrobat version XI or DC installed on the machine processing E-Mail Earnings Statements
5. Microsoft Outlook 2010, 2013, 2016, and 2019, or SMTP Server

Will Employee E-Mail Suite work with a Terminal Server?

Yes, E-Mail Earnings Statements will work on a Terminal Server.

Can the e-mail earnings statements and W-2 statements be sent to multiple e-mail addresses?

Yes, e-mail earnings statements and W-2 statements can be sent to multiple e-mail address. See the [Assign Multiple E-Mail Addresses to an Employee](#) section of this user guide.

Are the PDF statements secure while it is stored on a drive?

Yes, once the e-mail process is complete the PDF file is secure. Are any e-mails produced if a payment is voided?

No, an e-mail is not produced if a payment is voided. However, you do not have to send the e-mails until the payroll information has been corrected and verified. If a earnings statement is voided before the e-mails are sent the employee will be removed from the e-mail list.

Can the E-Mailed Earnings Statements be resent and will it still be secure?

Yes, navigate to the [E-Mail Earnings Statements window](#) select the appropriate payroll run and employee.

Will an employee need to have Adobe Reader to open the e-mailed statements?

Yes, the employee will need to have Adobe Reader installed on their personal computer in order to open the earnings statement or W-2 statement. In the e-mail body you can manage notifying the employee that they would need Adobe Reader. You can also include a link to a website where the employee can download Adobe Reader.

How do I prevent this error message? "When you create a PostScript file you must rely on system fonts and use document fonts. Please go to the printer properties, "Adobe PDF Settings" page and turn OFF the option "Rely on system fonts only; do not use document fonts".

Unmark the "Rely on system fonts only; do not use document fonts" option:

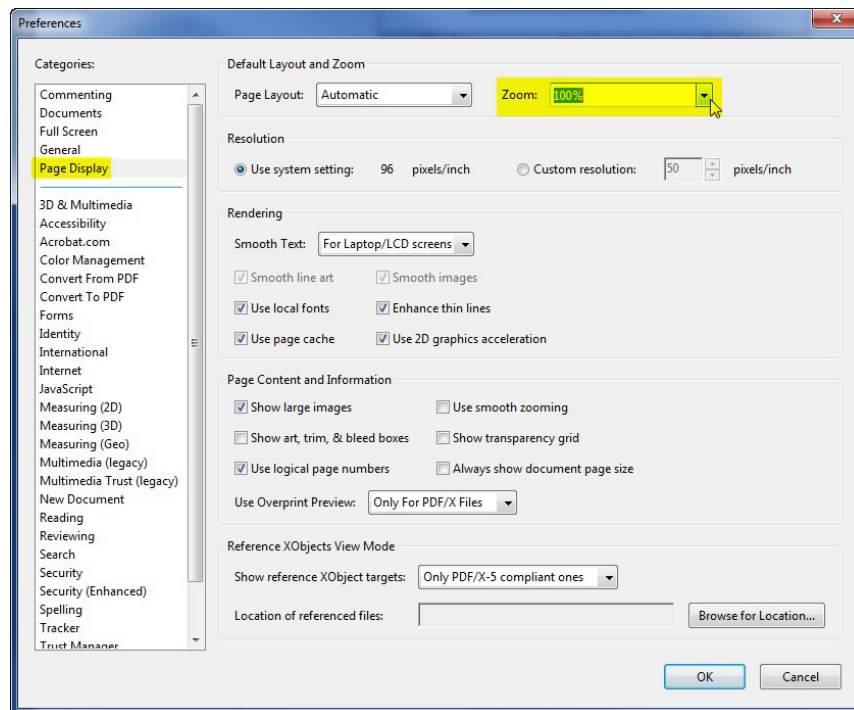
1. Click the Start button
2. Click Control Panel
3. Click Printers and faxes

4. Right click on the Adobe Printer
5. Select Printing Preferences
6. Unmark “Rely on system fonts only; do not use document fonts”
7. Select Apply
8. Close the Adobe PDF Printing Preferences window

Can I change the default zoom option within Adobe?

Yes, to change the default zoom option within Adobe:

1. Click Edit from the menu and then select Preferences
2. Within the Preferences window, choose the Page Display from the Categories section
3. Under the heading labeled “Default Layout and Zoom,” find Zoom. Choose the desired default zoom option from the menu (100%)
4. Click OK to close the Preferences window



Does the E-Mail W-2 Statements product print a copy for the employer to retain for their records?

Yes. E-Mail W-2 Statements product does print a copy for the employer to retain for their records.

Does the E-Mail W-2 Statements product print the W-3 Transmittal form that needs to be submitted to the government?

No. The W-3 Transmittal form still needs to be completed for the government within Microsoft Dynamics GP under the HR and Payroll pane select Routines > Payroll > Print W-2s.

Does the E-Mail W-2 Statements product complete the W-2 electronic filing?

No. The W-2 electronic filing still needs to be completed within Microsoft Dynamics GP under the HR and Payroll pane select Routines > Payroll > W-2 Electronic Filing.

Can the user reprint the W-2 statement after filing?

Yes. W-2 statements can be reprinted after filing. Within Microsoft Dynamics GP, open the E-Mail W-2 Statements window under the HR and Payroll pane select Routines > Payroll > E-Mail W-2 Statements, filter to the employee and click Process.

Can the E-Mailed W-2 Statements be resent and will it still be secure?

Yes, you can navigate to the drive/folder where the PDF files are stored and attach the secure PDF file to an e-mail and resend the secure earnings statement.

Contact Information

Get quick answers to your questions

[Browse our convenient Knowledge Base](#) for up-to-date answers to the most common questions. For additional questions, please contact your authorized Value Added Reseller (VAR) for support on this product (if you have one) or contact Integrity Data by emailing support@integrity-data.com or calling 888.786.6162.

If you have registered your product, Technical Customer Service is available for any customers with a current Enhancement Plan or subscription. Please have your Company or Site Name available. Your first line of support should always be your VAR (if you have one).

Rate us and our products

Are you pleased with your experience with us and our products? We'd love to hear from you. Fill out the [form on our contact page](#) and leave your quote in the comment section, you may be eligible for a special gift from us.

Suggest new features or improvements

User input into improving this product and constructive feedback are appreciated. We would love to hear from you. Technical and functional improvements to our products are highly encouraged. At Integrity Data, we want to hear your input, so drop us your thoughts on our [product feedback portal](#) !

Browse our solutions

The Integrity Data website is a great place to get additional information on products and services. The following information is available on our website:

- Integrity Data's [HR & Payroll software pages](#) include Demos, Features and Benefits, and ROI Calculators
- Visit our [Services page](#) to learn more about our additional customization services

If you would like to discuss your needs with a Sales Account Executive, please call 888.786.6162 or e-mail sales@integrity-data.com.