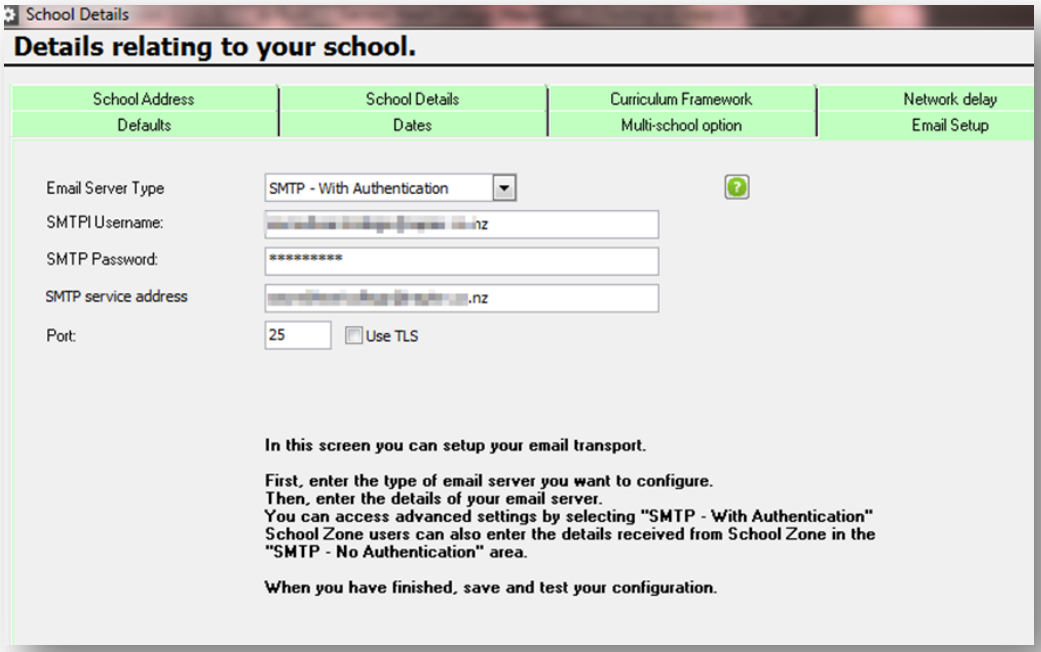
ClassRoom Manager and Student Manager
Setup for Emailing Statements to Caregivers

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).



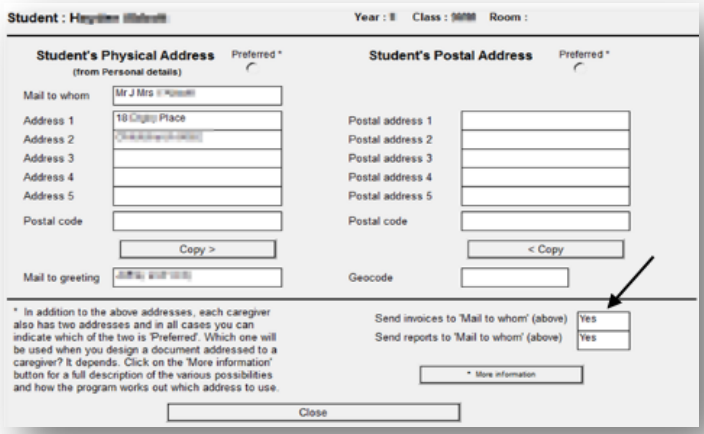
Open Student Manager

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'

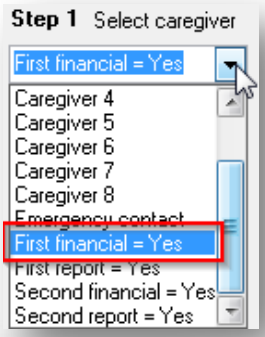


Set up one statement with the Caregiver address

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

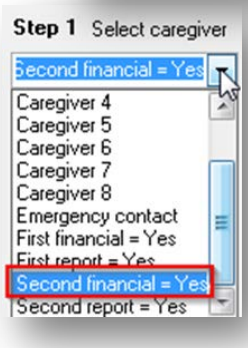
Set up a second statement with the Caregiver address

"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.

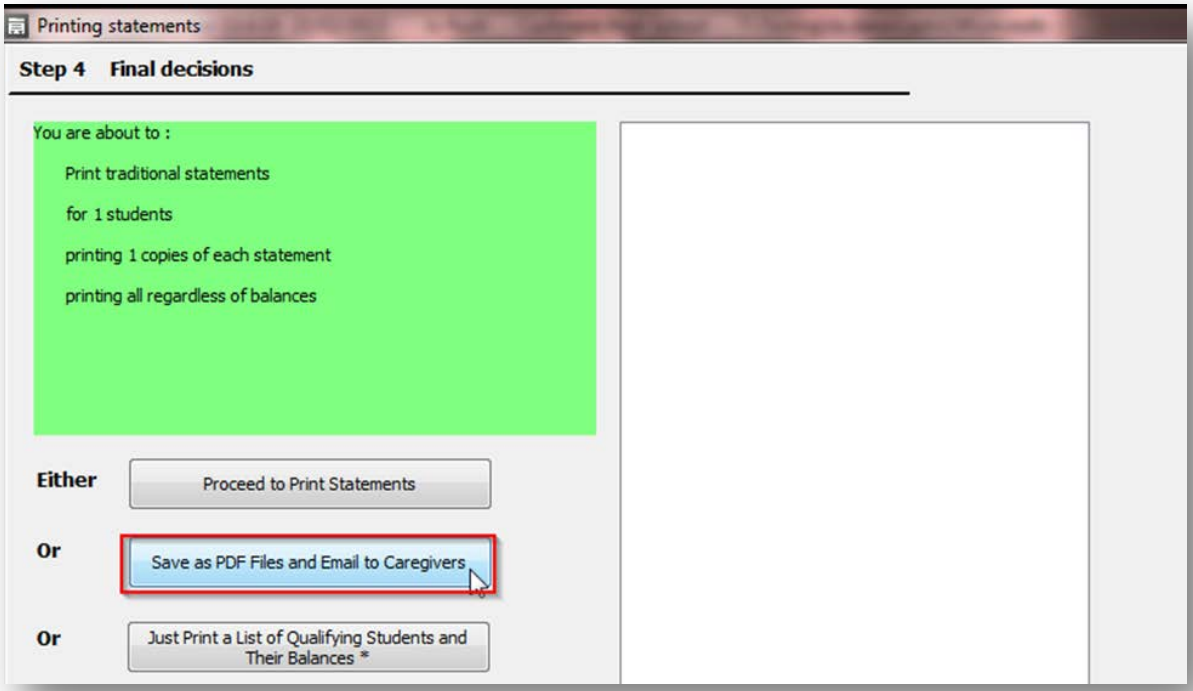
The statements are saved to file as a PDF and stored in `drive/cm/financial documents/statements/ PDF` - from here they are named with the '`statement name and date`'.
Inside this folder the PDF are named with the `student ID, date and time`.



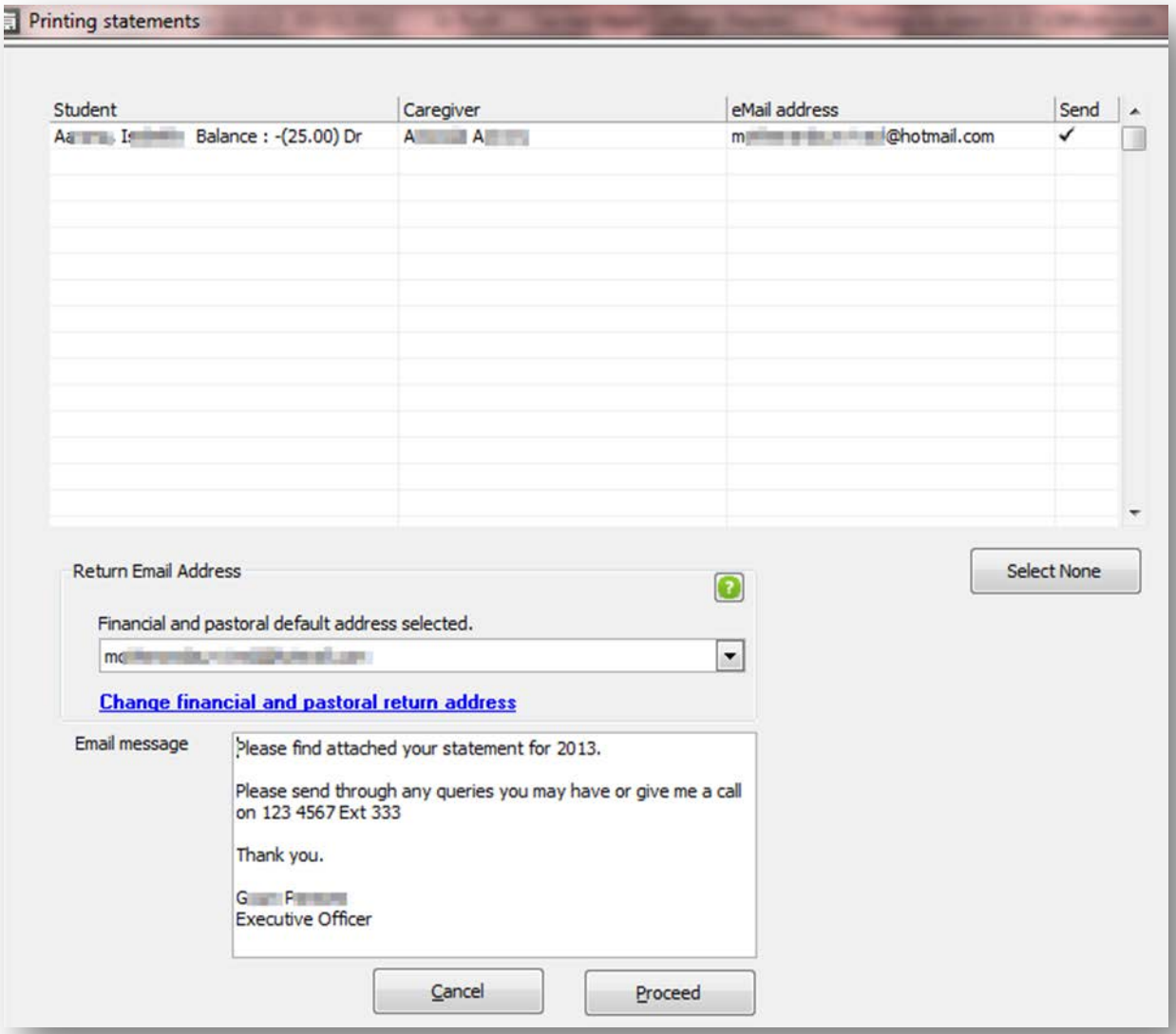
2 How to email statements

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'

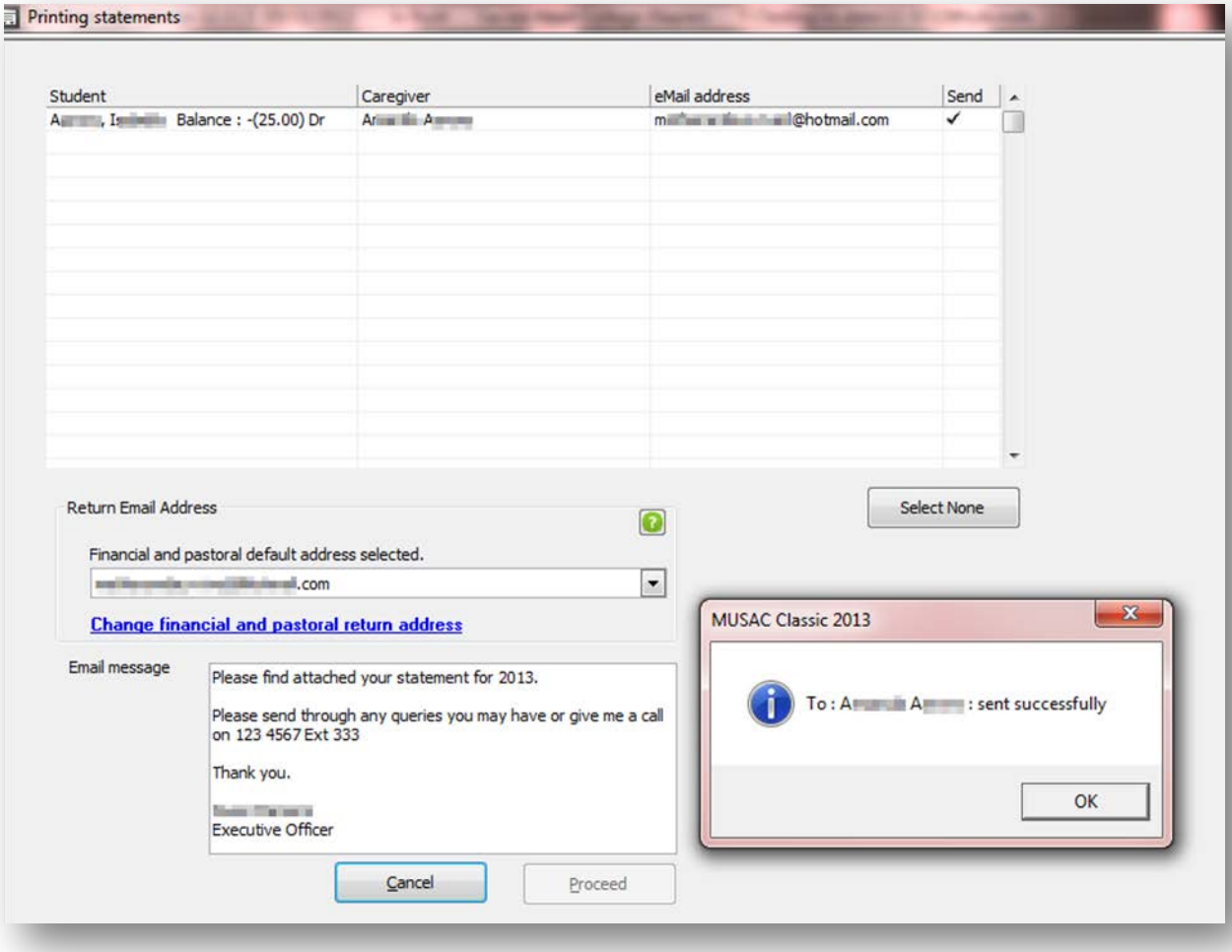


The next screen displays the Student, Caregiver, Email address and Send columns. Under „Send“ column – tick the email addresses you want to send the statement to. You also have the choice of “Select All”. If the Caregiver does not have an address you are not able to tick Send.



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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