P11D

MANAGER

How to send e-mails and store a default message

From the Employer List screen

- Select EDIT next to the employer record that you wish to send your e-mails on
- Select the 4th TAB called E-mails
- Enter your chosen 'From' e-mail address in the top box
- Enter the body of the e-mail message in the larger box – this message must not include a 'Dear ….' As the software will automatically include this and will select the first forename set up on the system
- Select SAVE

To send the e-mails:

- Select REPORTS
- Select the 3rd option – FILE BY INTERNET AND E-MAIL
- A list of further options will appear at the bottom of the screen. Select the 3rd option for E-mail
- You will also be given the option to include worksheets. Please select the box if applicable
- Select NEXT
- Select the employer record and select NEXT
- Your default message, if saved using the above instructions, will now appear.
- If you have not saved a default message then you can edit the message box at this point.
- Select the employees that you wish to e-mail and then select GENERATE

All e-mail activity is logged in the E-mail Activity screen. You can view this by visiting your employer record and selecting VIEW MORE OPTIONS and then choosing the E-mail Activity button.

TAXSHIELD
the accountants choice

Password Protecting the e-mails

P11D Manager includes the facility to password protect the P11Ds when they are sent by e-mail.

The password on the e-mails is controlled by the check boxes in the Edit Employer screen.

- From the EMPLOYER LIST screen Select EDIT next to the Trust Ford record
- This will open the 'Edit Employer' screen
- Scroll to the bottom and you will see 4 check boxes
- Select the 3rd one to initially set up the password protection feature for the P11Ds. This will also set the password as the employee's NI Number
- If you would prefer the password to be set as their date of birth then you must also select the 4th checkbox as well.
- Select SAVE
- When the e-mails are sent, we include a sentence which explains that the P11D will be password protected and the format of the password.

Further guidance

All of the e-mails are sent from our mail box which is noreply@taxshield.co.uk

By entering your e-mail address in the box provided the recipients will see your e-mail as the sender instead of our e-mail address. This is therefore useful should the recipient wish to reply to their P11D e-mail they will be able to reply directly to the 'sender e-mail' instead of responding to our 'noreply' mailbox.

Our software does not interact with your outlook contacts.

All e-mails are monitored using Sendgrid and therefore if you have any queries with a particular recipient not receiving their e-mails then please let us know and we will be able to investigate for you.