



regipay manual

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INTRODUCTION

This document helps you on daily working with regipay. The target audience are people who send regipay payslips and handle employee accounts.

ACCOUNTS

WHAT IS A REGIFY ACCOUNT?

A regify account is an account registered at your regify provider. It is assigned to at least one email address. Additionally, another four email addresses may also get assigned to this regify account, allowing you to open regify messages sent to one of these addresses with the same regify account.

In regify terms, a regify account is regimail private by default. If someone wants to use other regify products like regimail professional, regibox or sending regipay payslips, the product must get activated. For sending regipays, your regify provider is activating the ability to send regipays in his provider administration.

SENDING ACCOUNT

In order to send regipay emails using regipay desktop or the regify Client-SDK, you need a sending regify account. It is used to register regify messages in the regify system and needs to be entered in regipay desktop.

This account must be enabled to send regipay messages and must be authenticated with at least level 3. This is done by your regify provider. He will also provide you with the unlock-code needed during setup of regipay desktop.

MANAGEMENT ACCOUNT / GROUP ADMINISTRATOR

This is the regify account you use to login at your regify provider and manage the users of your group. **In most cases, this is the same as the Sending Account.** At least, this makes things more easy but it is not necessary. The sending account may also be another regify account than the management account. It's up on you.

EMPLOYEE ACCOUNTS

This are the regify accounts of your employees. If an employee receives a regipay message from you, he needs a regify account in order to open it. For regipay, the generic process is that you invite them to get a regify account.

By default, there is only one regify product enabled for such employee accounts: regimail private. This allows your users to open regipay messages. By this, your employees are also able to send up to ten regimails per month free of charge. This may be useful for payslip or tax related communication with the employers HR department.

GROUPS

A regify group is a virtual band around a group of accounts. It allows you to better organize and manage your employees regify accounts. And it allows regify to manage your employees and accounts for accounting.

There are a few limitations about groups you need to know:

1. A group is only having one group administrator (management account!).
2. The group administrator is always a member of his group.
3. A regify account can only be a member of one group (not multiple groups).

As a result, if you want to manage more than one group, you need multiple regify accounts with individual email addresses. Every regify account is assigned to one of the groups and may become the group administrator (management account). Ask regify support for creation of groups and assigning group administrators.

MANAGE GROUP

You enter the group administration by logging in to your regify provider using the management account.

There, please go to "My account" → "Account overview" and click the "Manage group" button in the overview. Alternatively, use the left navigation to enter "My account" → "Settings" → "Manage group".

FIND USER

In this dialogue you get a list of all group members. On top, there is a "Quick search" field. Enter parts of the user name or email address you're looking for to get a reduced list quickly:

Members of this group

Quick search:

Name:	E-mail address:	Action:
Administrator	admin@host.com	



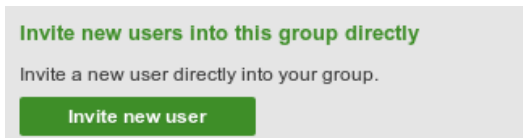
On the right, you will find other group related options.

EMPLOYEE MANAGEMENT

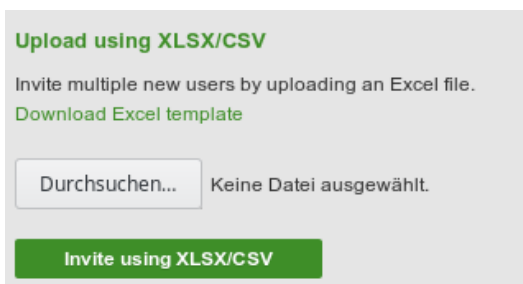
WAYS TO INVITE EMPLOYEES

As a group administrator, you have two possible options to invite new employees to get a regify account. Please go to the group administration dialogue and use the options there:

1. Invite single user using "Invite new user" option



2. Invite a bunch of new users using "Invite using XLSX/CSV" option



The first option only makes sense if you are to invite only a few users. The second option is much better as it allows you to invite users using an Excel file which you may simply update and re-upload.

INVITE NEW EMPLOYEES

SINGLE USERS

If you invite using the "Invite new user" option, please also enter some value to the "Organisation" fields. By this, you are able to later identify such people or even allow re-assignment. If you do not enter something here, the user may be hard to find later.

The "Mobile number" is optional and does not need to be entered. The same is for the "Personal message".

EXCEL UPLOAD

This is the preferred method if you have more than 40 employees to handle. You can download a template with help directly from the dialog by clicking the link "Download Excel template". Have a look at the annotations and help inside this template. It is also the best start if it is your first upload.

There are three important rules about the Excel file:

1. Do not change the number or order of the columns! If you do not need them, simply enter nothing but leave it where it is.
2. Always save the Excel file as XLSX file (default Excel file format since Office 2010). If you prefer CSV, please note the hints in the template.
3. The first line is always ignored. Please keep the headers in there.

For the Excel upload you enter your employee information line by line. One line for every person. During processing, it will create a regify account and an invitation email for all users in your file.

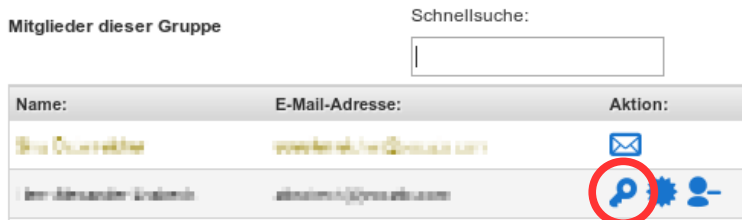
The best about the Excel file is, that the system first checks if the email address of the user is already having a regify account. If so, it simply skips this entry. By this, you can always use the same Excel file and add new users/employees if needed. You can re-upload this file at any time. It will only send invitations for the new entries.

If you get any errors during Excel file processing, please have a look and fix the entries in your Excel file (eg invalid email address, empty line etc). Then upload again. If errors stay, please contact us at support@regify.com for further help and assistance.

GENERAL PROBLEMS AND ISSUES

EMPLOYEE FORGOT PASSWORD

If a user does not know his password any more, please tell him to go to your regify provider homepage and use the "forgot password" function below the password field. If you like to, you can also use the "send a new password" icon from group administration.



In both cases he will get an email to his known email account. By pressing the link inside, the web-browser will open up to show him his new password.

EMPLOYEE DID NOT RECEIVE THE INVITATION EMAIL

In most cases, the invitation email was simply ignored or it was filtered as Spam/Junk. Because of this, please first ask your employee to check his Spam and Junk folders. Sometimes, if users are using outlook, the Spam is filtered on their email providers and therefore is not in a local Spam folder but can be found on the web-mailer (eg gmail, yahoo etc).

If the email really is lost and the entry is still visible in your group administration, you can click the envelope to re-send the invitation.

If the user is no longer visible (for example, if the invitation has already expired), you can re-invite directly.

EMPLOYEE USES A NEW E-MAIL ADDRESS

In this case, you have to do two things:





1. The employee must log in to his regify account (via the portal page or the home button in his client software). There he must add the new address under "My account" → "My e-mail addresses". He then receives an e-mail to this address in which he must confirm with a click.
2. You must enter the new e-mail address in your payroll software so that it will appear on the PDF in the future.

EMPLOYEE LEFT THE COMPANY

In this case, please use the quick search to identify the user in your group administration. Now click the "remove from this group" icon:

Mitglieder dieser Gruppe

Schnellsuche:

Name:	E-Mail-Adresse:	Aktion:
Wolfgang Müller	wolfgang.mueller@regify.com	
Wolfgang Müller	wolfgang.mueller@regify.com	  

This does not delete the users regify account! It simply removes it from your group. By this, your group is cleaned up but the former employee is still able to use his account to open up his payslips from his in-box.

SENDING WITH REGIPAY DESKTOP

GENERAL INFORMATION

The regipay desktop examines the given input folder and tries to process every PDF file inside. For this, it extracts the content and tries to find the employees email address. In addition, regipay desktop is able to extract further information like the payslip date or numbers from the payslip. Please read the regipay desktop manual to find out about the options. The manual is available in the regipay desktop menu on top.

Every PDF is then encrypted and registered at the regify infrastructure. Upon this, the encrypted file is sent, together with some default message body, by email. This means, the emails are not sent using regify infrastructure. The emails will leave your regipay desktop directly using your sending email account to be delivered to the employee. Regify does not forward, store or handle your payslip emails. The regify service is making sure that your employees are getting the software, account and keys to open up the payslip. In other words, we split the transaction from the transport.

The default message body for the payslip emails is defined in your regipay desktop configuration. You can use HTML and any text and combinations you like. It's upon you to define and adapt this template to your individual needs.

USING PROFILES

Usually you have a setting that also reads the date (REGEX) from the payslip and uses it in the e-mail template. To be able to send other types of documents as well, the regipay Desktop offers profiles (read the manual under "Help" -> "Open manual"). Here is a quick tutorial for creating a new profile for a different document type like income-tax statements:

1. Go to "Program" -> "Profile Manager..." and duplicate the profile.
 1. For example, the name of the profile copy could be "income tax statement".
 2. Enter a suitable description.
 3. Save the new profile.
2. Open the new profile and go to the normal configuration.
3. Under "Messages", adjust the message template and subject in such a way that it matches the desired message type (for income tax statements).
 1. If necessary, remove references to REGEXn, which usually contain the date or other extracted values.
4. Under "Documents", uncheck "Required" behind the REGEX for the date. You can leave the values as they are.

In future, you can use this profile to send the income-tax statements, and with the original profile you can send payslips. This saves you a lot of time the next time you want to send your income tax statements. Of course, you can also use some REGEX to search for values (for example, the year from the income tax statement) and then use these specifications in the message text.

For sure, this can also be used to send on behalf of another regify account, for employees of other companies or any other use. The number of profiles in regipay desktop is not limited.

TRANSFER SETTINGS TO ANOTHER/NEW PC

If you install regipay Desktop on a new PC, the settings such as the message template, regular expressions, paths etc. are no longer available. You have to save these settings on the old PC and then import them into the new one.

To do this, open the regipay desktop on the old PC and go to "Program" -> "Profile Manager...". There you select all profiles one after the other and click on "Export...". Save the profiles to a location from which you can access them later.

Note that the saved profiles may contain confidential information such as passwords. So make sure that these profiles do not become public or accessed by unauthorised persons.

On the new PC, you can press the „Import...“ button at the bottom left of the Setup Assistant when you start for the first time and import the first profile. You can then add all other profiles later in the profile manager with the "Import..." button.

FURTHER HELP

We created some additional help documents and information on our homepage:

<https://www.regify.com/index.php?PageID=FAQregipay>

There is some help document for employees together with some FAQ and help for regipay senders like you. Please have a look.

If you have problems or issues, please contact regify support at support@regify.com.