



## TABLE OF CONTENTS

INTRODUCTION .....	2
OVERVIEW .....	2
INSTALLATION.....	2
Requirements for installation .....	2
Installation Instructions .....	3
SETTINGS .....	7
General .....	7
Module Settings .....	9
Module Settings: <i>Student Billing</i> .....	9
Module Settings: <i>Registrar's Office</i> .....	11
SB/RO Email Settings .....	13
Email Templates .....	15
<i>The Template Editor</i> .....	16
PROCESSING EMAILS .....	18
IMPORTING DIAMOND MIND PAYMENT FILES.....	21

Create Deposit .....	22
Import transactions .....	22
APPENDIX A: Defining EE/FE Mail Parameters for use with Bill-O-Matic .....	24
Report Parameters and Recipient Query.....	24
APPENDIX B: REVISION HISTORY .....	26

## INTRODUCTION

This document serves as a basic instruction and informational guide to Bill-O-Matic™ for Schools. It covers the general working and processing of the application at the user level and is directed at a general audience of end users or those looking to better understand the application interface.

## OVERVIEW

The Bill-O-Matic Plug-In for The Financial Edge and The Education Edge is a convenient, efficient solution for distributing statements, receipts, report cards, infraction reports, and other correspondence electronically without leaving the Student Billing or Registrar's Office. It enables users to import existing tuition payment batches for electronic distribution and requires no pre-printed paper forms or forms software. Statements are distributed by Bill-O-Matic in PDF format along with a fully-customizable email message with mail merge features. Bill-O-Matic also takes advantage of tracking features in The Financial Edge/The Education Edge by recording an action to each recipient's record describing the distribution.

## INSTALLATION

### REQUIREMENTS FOR INSTALLATION

Bill-O-Matic is compatible with The Financial Edge/The Education Edge version 7.82 or higher. To verify your version, log into The Financial Edge/The Education Edge and select *Help→About The Financial Edge/About The Education Edge* from the toolbar. If you need to update your version, please contact Blackbaud Customer Support at 1-800-468-8996 or <http://www.blackbaud.com>

If your utilizes Blackbaud's Application Hosting Services, the Bill-O-Matic plugin must be installed by Blackbaud's Hosting Support team. For more information on Blackbaud's Application Hosting Services, please contact Blackbaud Customer Support at 1-800-468-8996 or <https://www.blackbaud.com/application-hosting/>.

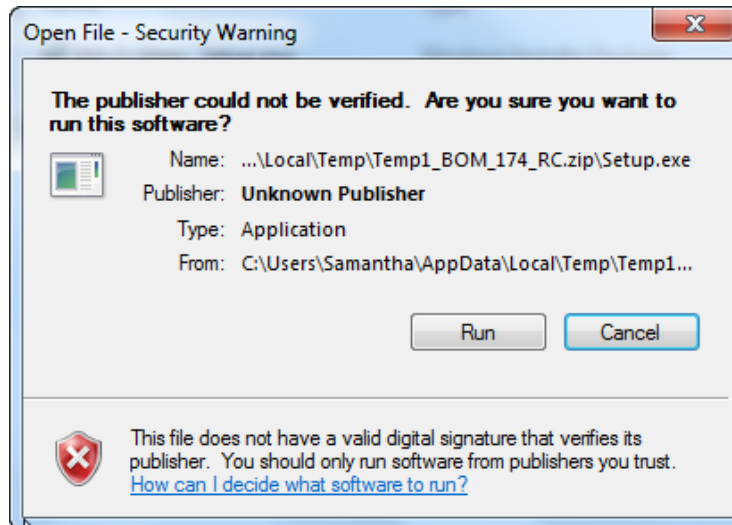
Bill-O-Matic must be installed on each workstation that will run the plugin, but the settings and configuration are shared between all installed workstations. If you do not have sufficient rights to install

programs on your workstation, please see your system administrator for assistance. Please note: the *same* version of Bill-O-Matic must be used on all workstations that connect to the *same* Financial Edge or Education Edge database. If updating or installing Bill-O-Matic on a workstation, ensure that any previous installations on other workstations are also updated, or those workstations may not be able to run the application. Always review and save the Bill-O-Matic settings whenever updating to a new version.

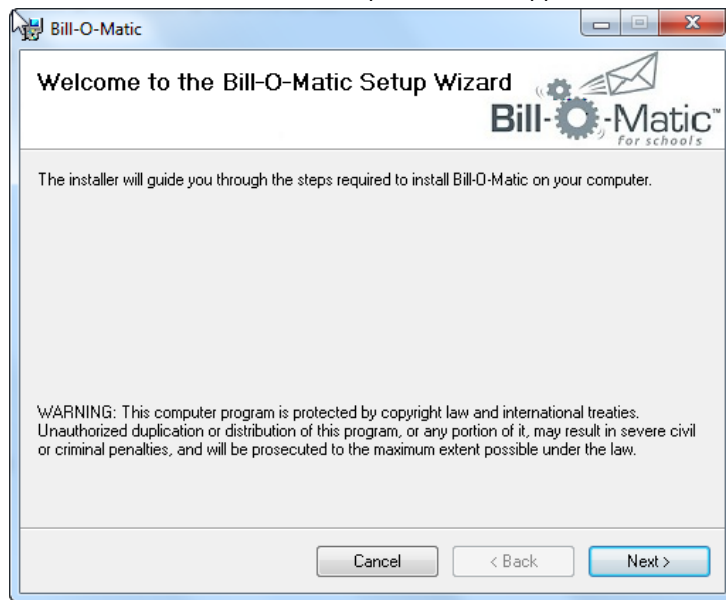
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## INSTALLATION INSTRUCTIONS

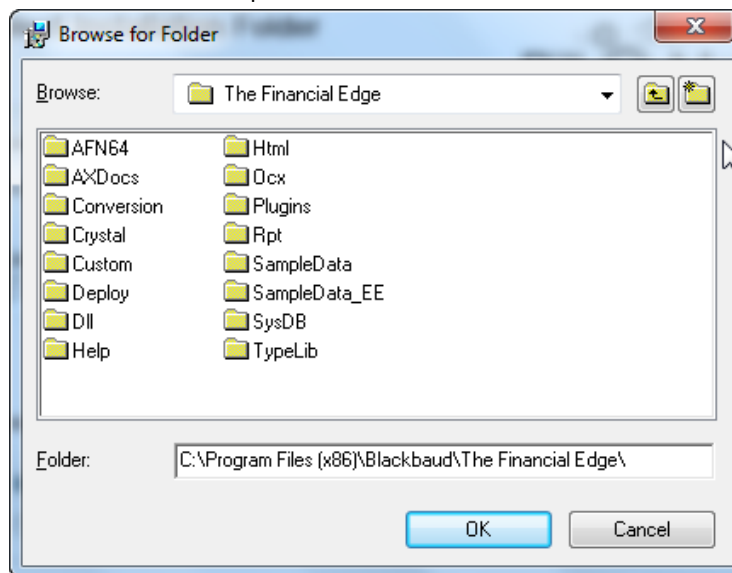
1. Exit and Sign-out of all Blackbaud products
2. Download the latest version of the BOM installer from O-matic Software's [Bill-O-Matic Updates forum](http://omaticsoftware.com/Forums/tabid/108/aff/17/Default.aspx)  
<http://omaticsoftware.com/Forums/tabid/108/aff/17/Default.aspx>
3. Extract the contents of the .zip file
4. Double-click the setup.exe file
5. Click *Run* to launch the installer

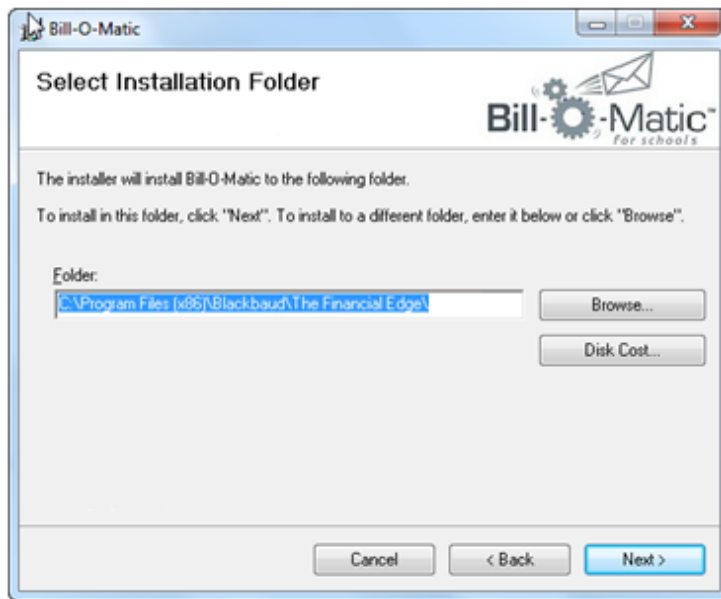


6. The *Welcome to Bill-O-Matic Setup Wizard* will appear, select next to begin the installation



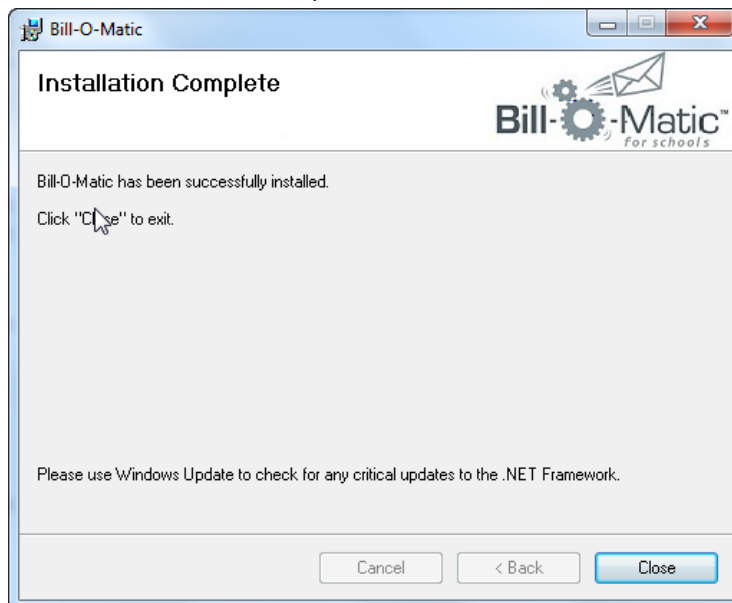
7. Click the *Next* button to continue the installation
8. Choose an installation path. **Bill-O-Matic must be installed in same location as The Financial Edge**





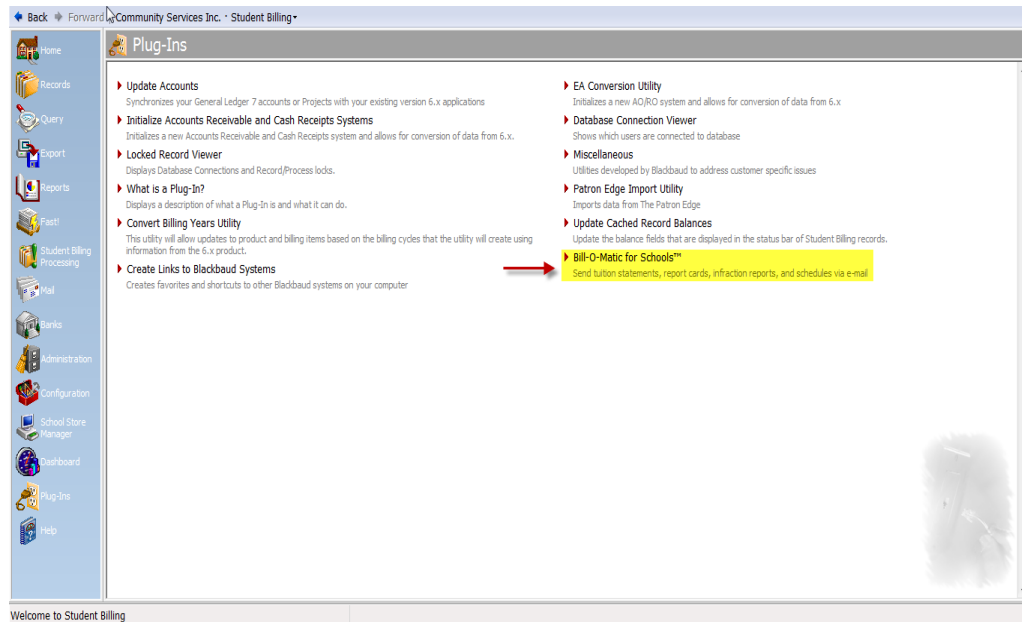
*If you are unable to locate the folder for The Financial Edge/Education Edge, please contact your system administrator*

Once the installation is complete, choose Close.

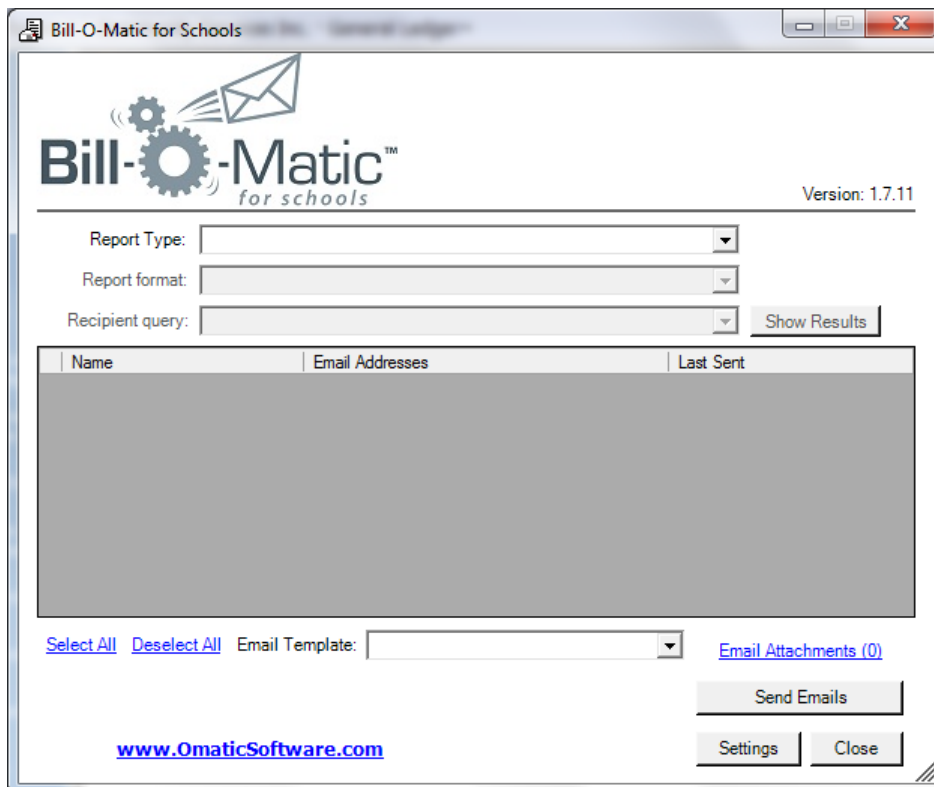


9. Log in to The Financial Edge/Education Edge.

10. Go to the Plug-Ins screen.



11. Click on the *Bill-O-Matic For Schools* link. The Bill-O-Matic processing screen will appear.



Prior to sending emails, Bill-O-Matic must be configured by clicking on the Settings button.

## SETTINGS

Click the Settings button on the main processing screen to configure the program. Bill-O-Matic settings are automatically shared between all workstations that utilize Bill-O-Matic. Configuration changes made on one BOM workstation will affect all other BOM users in your organization. Please carefully review all configuration values and preview all emails prior to processing.

### GENERAL

This tab contains settings common to both Student Billing and Registrar's Office correspondences. It will allow users to specify which email address contact type to use in mailings as well test emails prior to processing.

The screenshot shows the 'Bill-O-Matic Configuration' window with the 'General' tab selected. The window has a title bar with a close button. Below the title bar is a tabbed interface with tabs for 'General', 'Module Settings', 'SB Email Settings', 'RO Email Settings', 'Email Templates', and 'Advanced'. The 'General Settings' section is active and contains the following options:

- Contact Type for email address:** A list of checkboxes with 'Email' and 'Billing email' selected.
  - ☐ Home
  - ☐ Business
  - ☐ Cell
  - ☐ Fax
  - ☐ Beeper
  - ☒ Email
  - ☐ Web Address
  - ☐ Emergency
  - ☒ Billing email
- ☐ Use primary address only
- ☐ Restrict these settings to users with Supervisor rights
- ☐ Run in test mode (all emails are sent to sender)
- ☐ BCC sender's email address on every email sent
- ☐ Output diagnostic/performance log to file.
  - Performance file name and location: C:\Users\steves\Desktop\Performance.txt
- ☐ Continue sending emails when an error occurs and log exceptions to file.
  - Exception file name and location: C:\Users\steves\Desktop\Exceptions.txt
- Template and report folder (optional): C:\Program Files (x86)\Blackbaud\The Financial
- License key: 3f15096b9ddcb186a7235f675e470510

At the bottom right are 'Save Settings' and 'Cancel' buttons.

#### Contact Type for email address

Use this checkbox list to specify which Financial Edge/Education Edge contact type(s) should be used to determine the recipient email address(es). Contact Types are defined in the *Configuration* module of The Financial Edge/Education Edge.

#### Use primary address only

Select this option to only use email addresses that are on the recipient's primary address.

#### **Restrict these settings to users with Supervisor rights**

Selecting this option will restrict changes to Bill-O-Matic Setting to users with Supervisor rights in The Financial Edge/Education Edge.

#### **Run in test mode (all statements are sent to the sender)**

Use this option to run Bill-O-Matic in test mode. In test mode, all email statements that are generated are sent to the email address specified on the "SB Email Settings" or "RO Email Settings" tabs within BOM. It is strongly recommended that you test your mailings prior to sending.

#### **BCC sender's email address on every email sent**

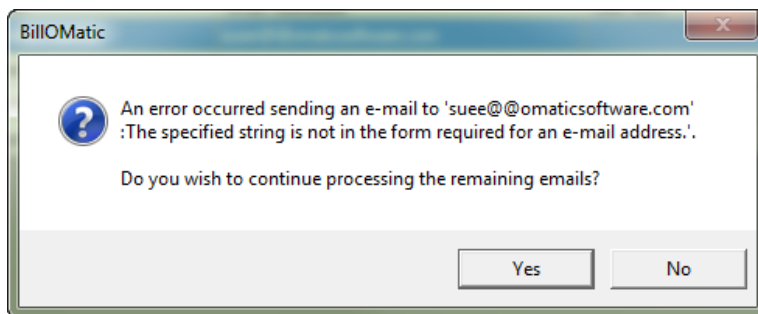
If selected, this will send a blind carbon copy of every email to the "From Address" specified under the **Mail Server and Account Settings For Student Billing/Registrar's Office** of the "[SB/RO Email Settings](#)" tab of BOM.

#### **Output diagnostic/performance log to desktop**

Selecting this option will produce a performance log for use in troubleshooting potential performance issues with Bill-O-Matic. This should only be run under the guidance of O-matic Customer Support.

#### **Continue sending emails when an error occurs and log exceptions to file**

Select this option to have Bill-O-Matic continue processing emails automatically if one or more of the emails being sent should encounter an error. If selected, no warning alert will appear until after all emails have been processed and all exceptions will be logged to a file. If this option is not selected and an email cannot be sent, a popup window will alert the user to the error each time and ask whether they wish to continue. Bill-O-Matic will not continue processing emails until the user specifies whether or not they would like to continue.



#### **Template and report folder**

If your organization is using custom templates, use the ... button to browse for the folder location. This is not necessary if the templates are in the *Financial Edge/Plugins* folder.

If your organization is using custom reports, you must specify the folder location. Use the same folder for both custom templates and custom reports.



## License Key

Activate Bill-O-Matic by entering your license key in the License key field. If you have not received your license key, please contact O-matic Software Support at (888) OMATIC-ME, option 2. The license key must be supplied prior to running any emails.

## MODULE SETTINGS

Module Settings will allow users to specify if an action should be added to the record for the recipient of mailing. Organizations can create a specific action type in the *Configuration* section of The Financial Edge/Education Edge to denote whether a general email, statement, receipt, report card, etc was sent. Additionally, Organizations can decide whether they would like to password protect report cards and statements.

Bill-O-Matic Configuration

General | **Module Settings** | SB Email Settings | RO Email Settings | Email Templates | Advanced

**Student Billing**

Add this action type to recipient record for general emails: Email

Add this action type to recipient record for statements: Email

Add this action type to recipient record for receipts: Email

☒ Password protect statements Password: Password field on Bio 1 tab

☒ Include records marked as 'Requests no email'

Custom Statement Text: STATEMENT Font Size: 13

Online Payment URL: <https://tuition.diamondmindinc.com/TuitionPortal3Step/Introduction.aspx>

**Registrar's Office**

Add this action type to recipient record for general emails: E-mail

Add this action type to recipient record for Report Cards: E-mail

Add this action type to recipient record for Infraction Reports: E-mail

Add this action type to recipient record for Schedules: E-mail

Get email addresses from student, relations, or both: Relation records

☒ Password protect report cards Password: Birth year + Last 4 of SSN

☒ Include records marked as 'Requests no email'

Save Settings Cancel

### MODULE SETTINGS: *STUDENT BILLING*

The following settings apply to Student Billing-related emails only.

**Add this action type to recipient record for general emails**

Select the appropriate action type if you wish to add a new action to each recipient's record when sending a Student Billing general email through Bill-O-Matic. Action Types are created and defined in the *Configuration* section of The Financial Edge/Education Edge. An action type must be selected from the drop-down list in order to have the action added to the recipients' record. The resulting action records the date and time the email was sent, as well as user name, email template used, and all recipient email addresses.

Leave this field blank if you do not wish to create an action.

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*For more information on how to create or modify action types in The Financial Edge or Education Edge, visit <http://www.blackbaud.com/support>*

#### **Add this action type to recipient record for statements**

Select the appropriate action type if you wish to add a new action to each recipient's record when sending a Student Billing statement or projected statement through Bill-O-Matic. Action Types are created and defined in the *Configuration* section of The Financial Edge/Education Edge. An action type must be selected from the drop-down list in order to have the action added to the recipients' record. The resulting action records the date and time the email was sent, as well as user name, email template used, and all recipient email addresses.

Leave this field blank if you do not wish to create an action.

---

*Statement recipients are pulled based how the Send Statements to column on the Statements tab of the Student Billing record. If there is more than one individual or organization marked to receive statements, then multiple emails will be generated for that particular student.*

#### **Add this action type to recipient record for receipt**

Select the appropriate action type if you wish to add a new action to each recipient's record when sending a Student Billing receipt through Bill-O-Matic. Action Types are created and defined in the *Configuration* section of The Financial Edge/Education Edge. An action type must be selected from the drop-down list in order to have the action added to the recipients' record. The resulting action records the date and time the email was sent, as well as user name, email template used, and all recipient email addresses.

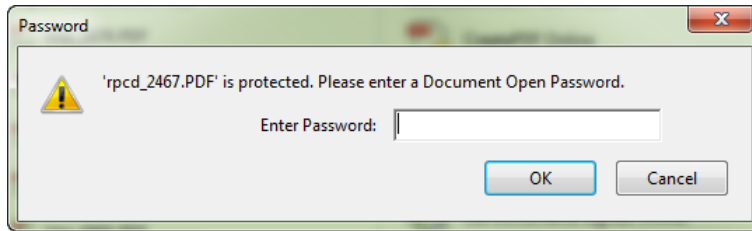
Leave this field blank if you do not wish to create an action.

#### **Password protect statements**

Selecting this option will allow organizations to password protect statement attachments. The email recipient must enter the password when opening the .pdf file email attachment. If a password can not be assigned to the statement, the email will not be sent.

---

*Passwords are created from the **recipient's** record, who may or may not be the student.*



Options are:

- Recipient's 5 digit ZIP code + first 2 lowercase letters of last name or company name (*this is the default selection*)
- Password field from the recipient's Bio 1 tab
- Contract ID field for the recipient as entered in the grid on the Statements tab

#### **Include records marked as 'Requests no email'**

Select this option to ignore the 'Requests no email' setting and send emails to these recipients.

#### **Custom Statement Text and Font Size**

This function allows users to change the "STATEMENT" heading that prints at the top of each statement.

#### **Online Payment URL**

Enter the URL of the website where recipients can click to apply payment to their account. This URL can be included in the email template.

---

*If you are using online payment processing services provided by Diamond Mind, enter the URL provided to you as is. When you save the Settings, BOM will modify the URL to incorporate the correct mail-merge fields into the URL so that each recipient is sent their own unique payment URL.*

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#### **MODULE SETTINGS: REGISTRAR'S OFFICE**

The following settings apply to Registrar's Office emails only.

#### **Add this action type to recipient record for general emails**

Select the appropriate action type if you wish to add a new action to each recipient's record when sending a Registrar's Office general email through Bill-O-Matic. Action Types are created and defined in the *Configuration* section of The Financial Edge/Education Edge. An action type must be selected from the drop-down list in order to have the action added to the recipients' record. The resulting action records the date and time the email was sent, as well as user name, email template used, and all recipient email addresses.

Leave this field blank if you do not wish to create an action.

---

*For more information on how to create or modify action types in The Financial Edge or Education Edge, visit <http://www.blackbaud.com/support>*

#### **Add this action type to recipient record for report cards**

Select the appropriate action type if you wish to add a new action to each recipient's record when sending a Registrar's Office Report Card through Bill-O-Matic. Action Types are created and defined in the *Configuration* section of The Financial Edge/Education Edge. An action type must be selected from the drop-down list in order to have the action added to the recipients' record. The resulting action records the date and time the email was sent, as well as user name, email template used, and all recipient email addresses.

Leave this field blank if you do not wish to create an action.

#### **Add this action type to recipient record for infraction reports**

Select the appropriate action type if you wish to add a new action to each recipient's record when sending a Registrar's Office Infraction Report through Bill-O-Matic. Action Types are created and defined in the *Configuration* section of The Financial Edge/Education Edge. An action type must be selected from the drop-down list in order to have the action added to the recipients' record. The resulting action records the date and time the email was sent, as well as user name, email template used, and all recipient email addresses.

Leave this field blank if you do not wish to create an action.

#### **Add this action type to recipient record for schedules**

Select the appropriate action type if you wish to add a new action to each recipient's record when sending a Registrar's Office Schedule through Bill-O-Matic. Action Types are created and defined in the *Configuration* section of The Financial Edge/Education Edge. An action type must be selected from the drop-down list in order to have the action added to the recipients' record. The resulting action records the date and time the email was sent, as well as user name, email template used, and all recipient email addresses.

Leave this field blank if you do not wish to create an action.

#### **Get email addresses from student, relations, or both**

When sending Report Cards this option allows you to choose whether Bill-O-Matic sends the emails to the student only, sends the emails to all of the individual, organization, and faculty relationships on student records that are marked "Receives Report Cards", or sends the emails to both the student and the relationships.

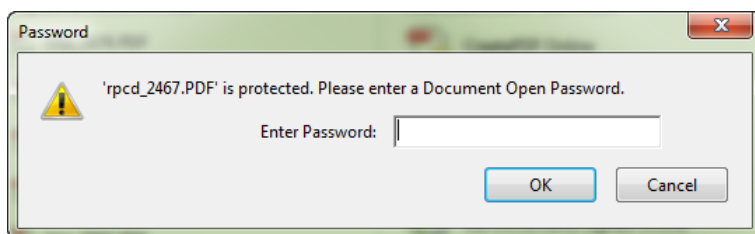
If mailing other items such as infraction reports or general emails, this feature will use relationships that are marked "View NetClassroom." If NetClassroom is not installed, Bill-O-Matic will use those relationships marked as "Receives Report Cards" for all emailing functions.

Add Relationship   Open Relation's Record   Remove Relationship...   Add New Record							
Name	Relationship	Reciprocal Relationship	Emergency Contact	Receives Report Cards	Lives with Student	Show on Transcripts	View NetClassroom
<input type="checkbox"/> Dennis Martin	Father	Daughter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Password protect report cards

Selecting this option will allow organizations to password protect report card attachments. The email recipient must enter the password when opening the .pdf file. If a password can not be assigned to the report card, the email will not be sent.

*Passwords are created from the **student's** record, who may or may not be the recipient.*



Options are:

- Birth year + Last 4 digits of SSN (*this is the default selection*)
  - If either field is blank, ##### is used (eg, 1997##### or #####0961)
  - If both are blank, the email will not be sent
- Birth year only, based on the birth date field
- Choose a specific attribute and the description will be used

## SB/RO EMAIL SETTINGS

These tabs contain the email configuration settings for Student Billing and Registrar's Office correspondences. Although the screens shown here are for SB, the options for RO are the same.

*Whether you are sending a Student Billing email or a Registrar's Office email is determined by the Report Type selection on the main Bill-O-Matic screen.*

Bill-O-Matic Configuration

General | Module Settings | SB Email Settings | RO Email Settings | Email Templates

**Mail Server and Account Settings for Student Billing**

Enter the SMTP credentials and details for the email account from which you wish to have Student Billing statements sent.

'From' email address: Billing@dayschool.org

'Reply To' email address: (optional)

'From' name: School Business Office

SMTP server: mail.authsmtp.com

SMTP user name: dayschooloffice

SMTP password: \*\*\*\*\*

SMTP port number: 2525 (optional)

☐ This mail server requires a secure connection (SSL)

☐ Request a read receipt for all emails

☐ If an email has multiple recipients add them all as BCC recipients (not recommended as this increases chances of email being identified as junk mail)

Send Test E-mail

Save Settings Cancel

#### **'From' email address**

Specify the email address that should appear in the "From" portion of the outgoing email. This should be a valid address with the school's email system. It may be helpful to use a "role" account such as "billing@xxx.edu".

#### **'Reply To' email address**

Optionally designate a different email address than the 'From' address for replies to emails sent from Bill-O-Matic. If used, this should be a valid address within the school's email system.

#### **'From name'**

Specify the name or department that is associated with the 'From' email address – such as "Jane Doe" or "Business Office".

#### **SMTP server**

Enter the name or IP address of the SMTP server that will be used to send emails.

---

*SMTP information is set up and by provided by your system administrator. It is strongly recommended that you contact your administrator prior to entering information in these fields.*

#### **SMTP user name/SMTP Password**

Specify a valid SMTP user name and password for the corresponding SMTP server

#### **SMTP port number**

Enter the SMTP port number to be used on the SMTP server entered above. *This field is optional.*

**This mail server requires a secure connection (SSL)**

Check this option if the SMTP server requires a connection secured with SSL.

**Request a read receipt for all emails**

If this option is selected, the “From” email address specified may receive a read receipt when an email is read depending on the email program being utilized.

---

*Most email client programs do not support or are not configured to use read receipt functionality, so this is not a reliable method to determine that emails were received.*

**If an email has multiple recipients add them all as BCC recipients (not recommended as this increases the chances of email being identified as junk mail)**

Selecting this option will place all email addresses of recipients for a particular student or family into BCC section of the email if there are multiple addresses.

---

*Example: Parents are divorced or separated: the mother, father, step-father and step-mother are all to receive statements. Parents do not want to share their email addresses with their ex'es. Selecting this option will place all email addresses in email BCC address.*

**Send test email**

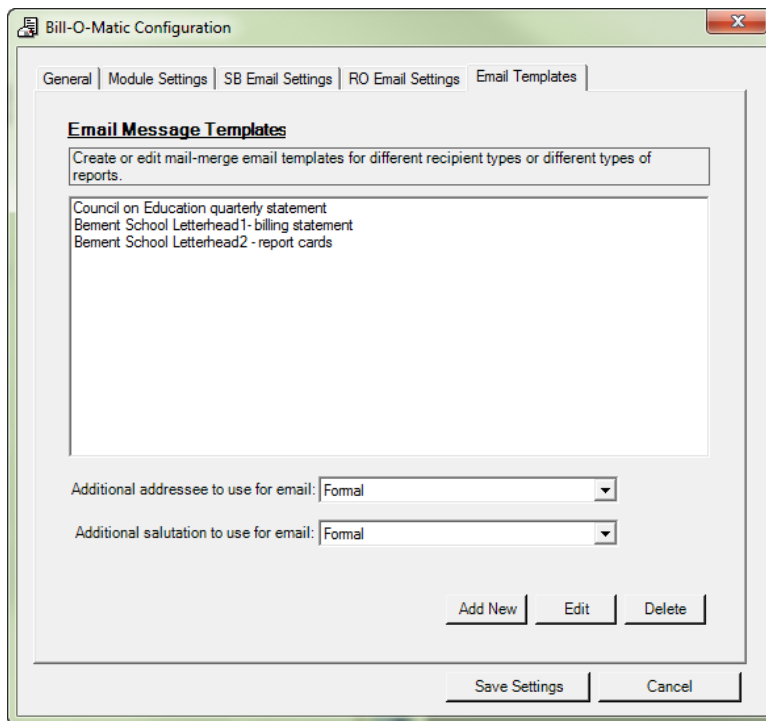
Will send a test email to the address specified in the “From” email address field. A popup window will confirm whether or not the email was successfully sent.

## EMAIL TEMPLATES

This tab gives the user the ability to create, edit and delete rich-text templates for the email message that the report PDF file (the statement, receipt, report card, etc) is attached to. Emails can include a link to the payment portal for statements or school website as well as insert images such as school logo. Multiple email templates may be created for each school or department.

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*The specific email template used for a mailing is selected on the main Bill-O-Matic screen.*



#### **Additional addressee to use for email**

Specify what addressee from the recipient record to substitute for the "" {%ADDITIONAL\_ADDRESSEE%} merge fields of the email. If no addressee is designated, the system will use the Primary Addressee.

#### **Additional salutation to use for email**

Specify what salutation from the recipient record to substitute for the " {%ADDITIONAL\_SALUTATION%}" merge fields of the email. If no salutation is designated, the system will use the Primary Salutation.

#### **Add New**

Selecting the *Add New* option will launch the Template Editor so a new email message template can be designed for use with Bill-O-Matic.

#### **Edit**

Select a template and click the *Edit* button to modify an existing email message in the Template Editor.

#### **Delete**

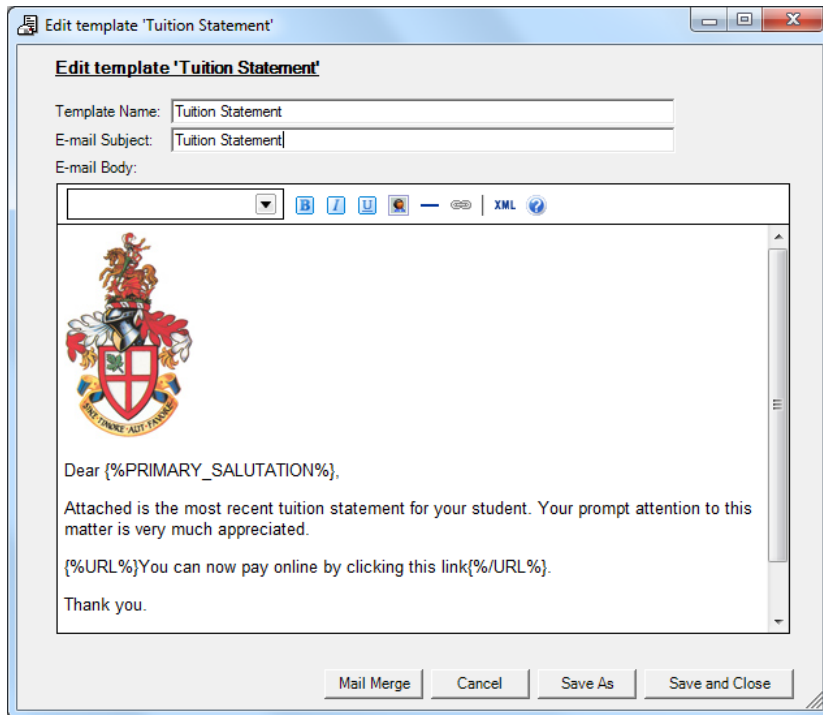
Select a template and click the *Delete* button to delete an existing email template.

---

### **THE TEMPLATE EDITOR**



Access the Template Editor by selecting either *Add New* to create a new email message template or *Edit* to modify an existing email message template. Note: these templates will eliminate the need to leave The Financial Edge/Education to create and send emails .



### Template Name

The Template Name entered here will appear on the list of templates on the Email Templates tab. This feature will not appear in the context of the email.

### Email Subject

Information entered here will appear in the subject line of the email when sent from Bill-O-Matic.

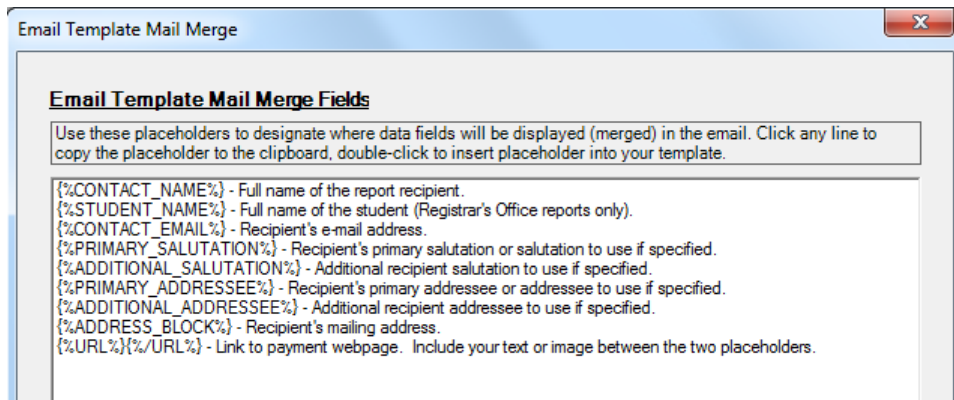
### Email Body

The email body is where the email content will be constructed. This is similar to a text and merge file – images, URL links and merge fields can be entered here.

Use the dropdown or the buttons to add effects such as bolding, italicizing, and underlining text, add images, draw a line, and define hyperlinks. Click the *XML* button to edit the raw HTML.

### Mail Merge

Clicking this option will display the Email Template Mail Merge Fields. Use these placeholders to designate where data fields will be displayed (merged) in the email. Click a field to copy it to your clipboard, double-click a field to insert the merge field into the email body. A mail merge field may be used more than once in an email template.



Click **OK** to return to the Email Template Editor.

*To use the Online Payment URL from Module Settings - Student Billing, add the URL placeholder tags and add the text you wish to become the hyperlink in between them. For example:*

*{%URL%}Click here to pay online{%/URL%}*

#### **Cancel**

Click the *Cancel* button to cancel template creation or editing without saving changes.

#### **Save As**

Selecting this option will allow a user to save a copy of the email template with a different name.

#### **Save and Close**

This will save a newly created or edited template will return to the Bill-O-Matic Settings.

#### **Save Settings**

Once all BOM configuration settings have been defined, select Save Settings to return to the main Bill-O-Matic processing screen.

#### **Cancel**

Selecting this option will close out of the Settings without saving changes.

## **PROCESSING EMAILS**

Once you have configured the Bill-O-Matic Settings, you are ready to generate and send emails.

#### **Record Type**

Select the type of correspondence you are sending:

- Student Billing: Statements
- Student Billing: Projected Statements
- Student Billing: Receipts
- Student Billing: General Email
- Registrar's Office: Report Cards
- Registrar's Office: Infraction Reports
- Registrar's Office: Schedules
- Registrar's Office: General Email

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*If your organization uses custom reports, they will be listed following the related reports – ie, custom Student Billing reports are listed after the standard SB reports and custom Registrar's Office reports are listed after the standard RO reports.*

Selecting one of the Student Billing report types causes Bill-O-Matic to use the settings you entered in the Student Billing section of the Module Settings tab in *Settings*, as well as the email configurations in the SB Email Settings tab in *Settings*. Settings for Registrar's Office are ignored.

Selecting one of the Registrar's Office report types causes Bill-O-Matic to use the settings you entered in the Registrar's Office section of the Module Settings tab in *Settings*, as well as the email configurations in the RO Email Settings tab in *Settings*. Settings for Student Billing are ignored.

### **Report Format**

Select the desired format (report parameters files, configured in Mail → Forms) for the report type selected (report formats are not available for General Email). Reports are sent as PDF email attachments. See [APPENDIX A: Defining EE/FE Mail Parameters for use with Bill-O-Matic](#) for more information on configuring report parameters in FE/EE for use with Bill-O-Matic.

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*To access the report parameters on the fly, right click on the selected report format and select View Report Parameters.*

### **Recipient Query**

Select a record query from the *Recipient Query* drop-down list. While any record query can be used as the Recipient Query, only queries created by previewing the report and generating a query of recipients are supported by O-matic Software for Bill-O-Matic. See [APPENDIX A: Defining EE/FE Mail Parameters for use with Bill-O-Matic](#) for more information on generating a recipient query from the report parameters.

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*To access the report parameters and generate a query on the fly, right click on the selected report format and select View Report Parameters.*

### **Email Template**

Select the desired template for the body of the outgoing emails.

## Email Attachment

If you wish to include additional email attachments, click the *Email Attachments* link to select files.

## Show Results

Clicking the *Show Results* button displays the selected recipients based on the recipient query. Recipients without a valid email address are grayed out. Recipients with valid emails but with other invalid information, such as no valid password, are displayed in red.

The columns in the results list are:

1. **Name** – this is the name of the email recipient
2. **Email Address** - this is the email address of the recipient

Statement recipients are pulled based on the “Send Statements to” column on the Statements tab of the Student Billing record. If there is more than one individual or organization marked to receive statements, then multiple emails are generated for that particular student.

When running report cards or transcripts for Registrar’s Office, if the option “Get email address from relationships record” in Module Settings - Registrar’s Office is selected then the recipients are the students’ relationships. If not checked, the students’ names and corresponding email addresses will appear.

3. **Last Sent** -This will show the date of the last action generated from Bill-O-Matic if that option is configured in Bill-O-Matic *Settings*. If the action feature is not being used, this column will be blank.

Right-click on a recipient row to perform the following tasks:

Student	Recipient	Email Addresses	Last Sent
<input type="checkbox"/> Stephanie Davis	Mr. Carl Davis	carldavis@email.com	
<input checked="" type="checkbox"/> Stephanie Davis	Mrs. Ellen Carter		
<input type="checkbox"/> Stephanie Davis	Mr. Edward Davis		
<input type="checkbox"/> Douglas Baldwin	Bruce Baldwin		
<input type="checkbox"/> Douglas Baldwin	Sharon Baldwin		
<input type="checkbox"/> Douglas Baldwin	Donald Baldwin		
<input type="checkbox"/> Drew Ash Abemethy	Mary Jane Abemethy		
<input type="checkbox"/> Michael Richard An...	Mr. Alex Edward Andrews	alex.andrews@pepperworth.org	
<input type="checkbox"/> Michael Richard An...	Mrs. Elizabeth Andrews		

### ***View recipient***

Select this option to open the recipient record in The Financial Edge/The Education Edge where you may edit and save the record before returning to Bill-O-Matic. Changes to the email address will appear in the grid.

### ***Preview email***

Select this option to preview a copy of the email message that will be sent. The preview email uses the selected email template and incorporates the recipient information from the selected record including any placeholders used.

---

*At least one email must be previewed before emails can be sent*

**Preview <report type>**

The prompt for this option will reflect the report type selected, such as “Preview Statement” or “Preview Report Card”. Select this option to preview a copy of the report that will be sent. The preview report uses the selected report type and incorporates the recipient information from the selected record.

---

*It is highly recommend that you preview reports to ensure accuracy before sending emails*

**Export grid to Excel**

Select this option to export the recipient list to a CSV file.

**Send Emails**

Select the recipients you wish to send emails to by checking the checkboxes next to their names. Use the *Select All* and *Deselect All* links to select/deselect all recipients with valid email addresses at once. Then click the *Send Emails* button to send to the selected recipients.

---

*Before you can send emails, you must first preview at least one email. Previewing reports is highly recommended. Preview emails or reports by right-clicking on a recipient.*

During this process reports are generated in PDF format and attached to email messages based on the selected email template. Because reports are generated individually, sending to a large number of recipients may take some time. A status window is displayed during statement generation and transmission to your email server.

---

*It is highly recommended that you first send a few emails in test mode. Test emails are sent to the ‘From’ email address as defined in the SB Settings or RO Settings tabs in Settings instead of to the recipients. Select **Run in test mode** on the General tab in Settings.*

## IMPORTING DIAMOND MIND PAYMENT FILES

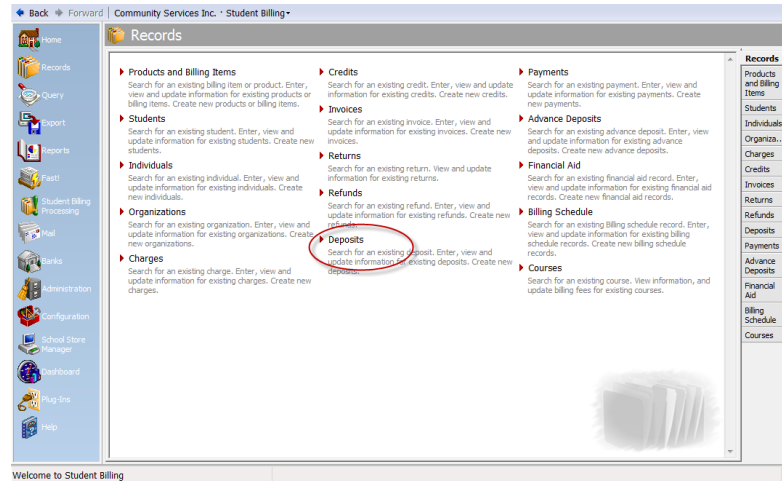
If you are using online payment processing services provided by Diamond Mind, you can download transaction files from the Diamond Mind Portal that you can import into The Financial Edge/The Education Edge.

Follow these steps to import Diamond Mind transactions into The Financial Edge/The Education Edge.

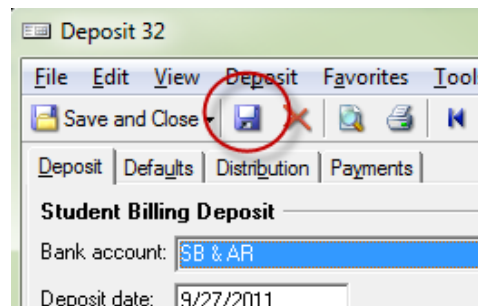
## CREATE DEPOSIT

Diamond Mind transactions are imported into a Deposit.

1. In the Student Billing module, go to Records, Deposits.



2. Add a new deposit and click **Save**. The deposit record must be saved before an import can be performed.



## IMPORT TRANSACTIONS

1. In the deposit record's macros menu, select *Import Payments*.

2. Browse for and select the transaction file provided to you by DiamondMind.

Select the "Use transaction date from file as payment date" option to use the transaction dates in the file as the payment dates in the deposit.

Select the "Add payer name to comments field" to include the payer name in the transaction comments field.

3. Click the *Import* button to begin the import.

If the recipient clicked the payment link containing the DiamondMind URL that was provided in your email, the transaction has the student's unique ID and the payment is imported automatically.

If the recipient navigated to the payment webpage without using the DiamondMind URL that was provided in your email, Bill-O-Matic displays transaction information and attempts to search for any matches. The user confirms each match by clicking *Open* in the search window or searches for and selects an alternate match and clicks *Open*.

Record type	Record name	Record ID	Billing status	SSN/CFDA #
Student	Greg Jacobson	0003	Active	555-12-1111

- Imported transactions write to the deposit's Payments tab. They can now be processed normally.

*The payment records will contain comments if defined in one of 3 sources: first BOM uses comments contained in the Diamond Mind file, if none then BOM uses comments on the Deposit record's Defaults tab, if none then BOM uses the Student Billing → Configuration → Business Rules → Payment → Default statement description field*

## APPENDIX A: DEFINING EE/FE MAIL PARAMETERS FOR USE WITH BILL-O-MATIC

### REPORT PARAMETERS AND RECIPIENT QUERY

In order to use Bill-O-Matic for generating statements, receipts, or projected statements from Student Billing or report cards, infraction reports, or schedules from Registrar's Office, you must define the report parameters in the Mail → Forms area of The Financial Edge/The Education Edge. This is also where the output query of the records to use in Bill-O-Matic is created. While any record query can be used as the Recipient Query, only queries created by previewing the report and generating a query of recipients are supported by O-matic Software for Bill-O-Matic.

This document serves as basic guide to show users how to use existing mail parameters in conjunction with Bill-O-Matic.

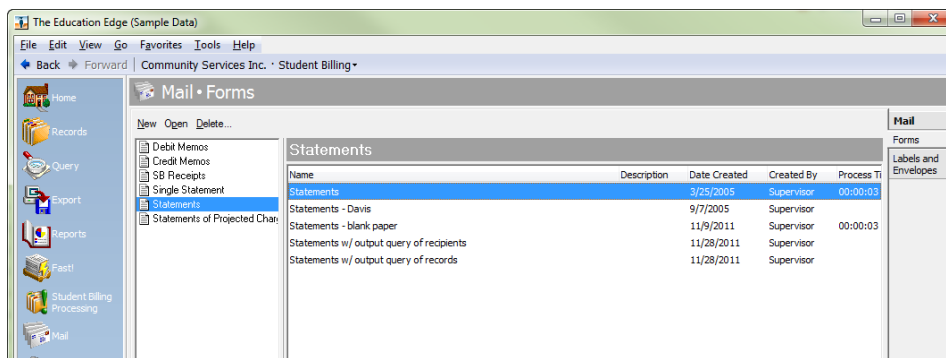


For detailed instructions on how to create mailings from The Financial Edge or The Education Edge, please visit [www.blackbaud.com/howto](http://www.blackbaud.com/howto) or call 1-800-468-8996 to speak to a Blackbaud Customer Service representative.

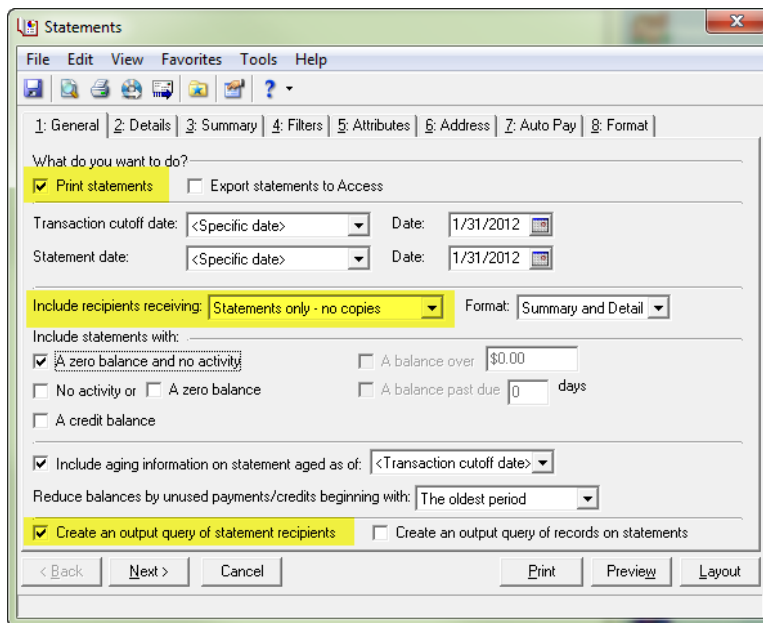
In this example, we would like to generate statements.

The steps below detail the mail parameters for statements in Student Billing. The process is similar for generating emails from Registrar's Office.

1. In the Student Billing Module, open or create a statement template under Mail → Forms → Statements



2. On the *General* tab define the parameters to generate your statements.

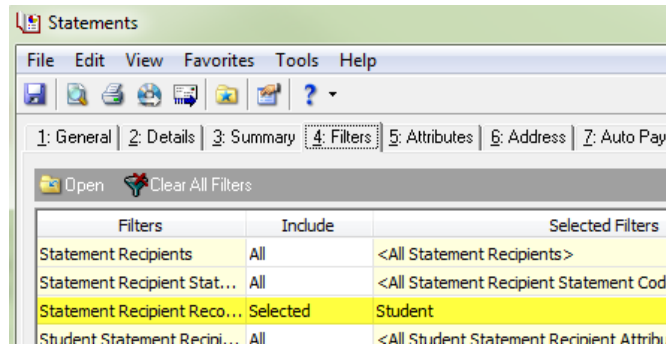


**Print Statements** - select this option to tell the system that statements will be printed

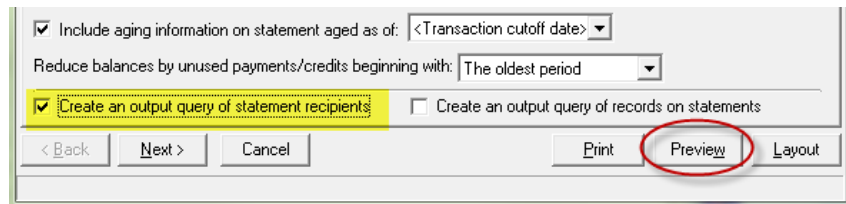
**Include recipients receiving** – set this option to generate Statements only – no copies.

**Create an output query of all statement recipients** - select this option to create a static query of those records that will receive a statement. This query is based on the parameters of the mailing and will be used in Bill-O-Matic to generate the list of email recipients.

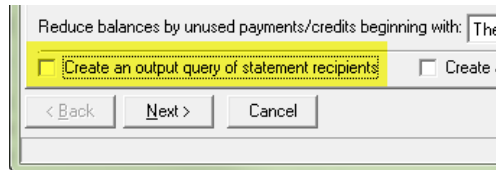
3. On the "Filters" tab, set "Statement Recipient Record Types" to either "Selected" and choose "Student", "Individual", and/or "Organization", depending on which record type(s) has the email address you wish to send to.



4. Set other parameters if desired, such as attributes.
5. On the General tab, click *Preview* and name the query when prompted. Confirm that all needed recipients are in the resulting preview. This is the query that you will select when sending emails using this report format.



6. Clear the "Create an output query of statement recipients" option and save the parameters.



## APPENDIX B: REVISION HISTORY

### V1.8.9 20JUN2012

- Added support for custom reports
- Added option to include records marked as 'Requests no email' for both RO and SB
- Added check for record ID of zero in query results for Student Billing, it was already in for Registrars Office

### V1.7.30 04MAY2012

- Removed check for the number of fields in the DM file due to DM decision to add coulms as needed w/o notice

#### V 1.7.29 29MAR2012

- Fixed issue when sending emails to organization recipients

#### V 1.7.28 21MAR2012

- When running statements, if the Student Recipient Attributes filter is set to Exclude, then each recipient receives statements for all recipients.
- On windows XP, Clicking the Add File button on the attachments form would cause a "Method not found" error

#### V 1.7.27 08MAR2012

- Added custom background support for STMSBUS1BP00? statement formats. The template file needs to be named SBSTATEMENTBP00?.pdf.
- Added support for a central location for custom template and report files, BOM will check there first, then the Plugins folder.
- Registrar's Office Only: Changed "Get email address from relationship record(s)" to a drop down with options of Student, Relationship, or both.

#### V 1.7.26 06FEB2012

- Removed support for Omatic's built-in background for Receipts, the only thing we can add for receipts is a signature

#### V 1.7.25 03FEB2012

- Change made to use the same source for the ID in the DM payment link for for both SB and RO
- Added a log entry to indicate the template file and path being searched for
- Fixed a type-o in 'send emails' message box

#### V 1.7.19 24JAN2012

- Added option in settings to restrict search for contact email type to Primary addresses only
- When searching for contact email types, addresses with a Valid To date less than current date are now excluded
- Fixed bug on the RO results grid that was causing the wrong record to open from the right click menu
- Added password option of 'Birth year only' to Report Cards
- Fixed bug when the option 'Get email addresses from relationships' was checked, no passwords were generated
- Reset the prompt to preview email after clicking Show Results rather than reloading the email template list
- Added tooltip to the RO password label in settings

#### V 1.7.14 05JAN2012

- Fixed issue with grid that caused emails to not be sent and the Select All button to not function

#### V 1.7.12 21DEC2011

- Import Payments: Fixed issue with message "Default comment from deposit not showing on payment"
- Import Payments: Use payment type in DiamondMind file (cc = Credit Card or ck = Received EFT) instead of defaulting to CC
- Import Payments: Payment comment set in this order: In file, Default on Deposit record, Default from SB->Config->Biz Rules->Payment->Default statement description
- Import Payments: Use transaction date from file unless field is read only due to the GL->Config->Biz Rules->Transaction->Do not allow post dates to be different from transaction dates
- Import Payments: Added option to include payer name in the comments field

- Import Payments: Added code to disable the auto-select single match search results
- Import Payments: Added functionality to open search form if the ID in the file doesn't match a record in the database
- Fixed bug "File not found" when previewing statements or receipts
- Added support for multiple attachments when sending emails
- Added option to BCC all recipients to hide emails from recipients
- Added Save As option to email templates
- Added report type of Projected Statements for SB
- Default Statements and Projected Statements "Include Recipients receiving" option to "Statements Only - no copies"
- Removed check box for Include Grid Lines on Statement, this will happen automatically by design
- Fixed bug with email template drop down not refreshing after adding/removing templates
- Added support for additional blank page formats on Statements and Projected Statements
- Reduced the need to reload the grid when making changes to settings or recipients
- Improved error handling when fetching records from query (Show Results button)
- Fixed bug: Actions were not added to recipients for RO emails when the "Get email address from relationship record(s)" option was NOT checked
- Fixed bug: Action type for SB Statements was not saving
- Added functionality to replace "AccountID=#&StudentFirst=#&StudentLast=#" with "AccountID={%ACCT%}&StudentFirst={%FIRST\_NAME%}&StudentLast={%LAST\_NAME%}" when entering a Payment URL, Replace occurs when leaving the field and during save
- Changed text on email template Help button to "Mail Merge"
- BillOMatic.tlb will now automatically copy to the Custom folder during the installation
- Fixed bug: loading template dropdown after the selected item was deleted in settings
- If "Create Output Query" option is selected in the report parameters it will now be ignored in BOM for all reports
- New statement and receipt background files added as defaults, improved support for custom receipt backgrounds
- Added code to suppress the printing of report criteria on RO Schedules and Infraction reports
- Added code to remove commas and colons from the name added to payment link when sending statements
- Improved performance while loading results grid for all report types
- Added password protection option for statements and projected statements
- Enhanced grid to reflect the password status when running password protected reports, it will now display red text on a grey background if a password cannot be generated.
- Added tooltips to indicated why rows are disabled in the grid (no email, or no password)
- Added mail merge fields for both RO and SB passwords
- Added new report formats to improve cleanup of temp files
- Reversed positions of the query and report format drop down lists
- Added Query Search to right click menu on Query drop down list

#### V 1.6.6 (27SEP2011)

- Added Reply To email on SB and RO email settings tab
- Added auto continue option when email errors are encountered, exceptions written to desktop file
- Added Send Receipts functionality
- Added additional Addressee and Salutations to use in email templates
- Now ignores email addresses that do not have an @
- Added right-click functionality to query drop down and report format drop down to show config forms

- Fixed bug: Actions not being added when sending general emails
- Fixed bug: Action type in settings didn't save for general emails after exiting FE
- Added check/prompt for at least one contact type select for email
- Fixed bug: Adding a blank rectangle for custom statement text not specified
- Added ability to specify paths for output files

#### V 1.6.5 (19SEP2011)

- Improved error handling for importing payments
- Importing payments now applies deposit defaults (except comments)

#### V 1.6.4 (14SEP2011)

- Payment date when importing payments now defaults to deposit date

#### V 1.6.3 (27JUN2011)

- Update to not overwrite custom statement backgrounds with updates
- Fix for DiamondMind import when student detail column is missing final comma

#### V 1.6.2 (9JUN2011)

- Added ability to send an email without a report attached
- Added ability to sort recipient list by last name

#### V 1.6.1 (06APR2011)

- Updated for online tuition payment import into deposits

#### V 1.6.0.1 (18JAN2011)

- Fixed issue saving updated Diamond Mind URL

#### V 1.6.0 (05JAN2011)

- Added DiamondMind integration for online bill payments
- Added utility to import online transactions into payment deposits

#### V 1.5.3 (09NOV2010)

- Fixed port number setting for RO reports email settings not being saved
- Fixed preview report link on email preview form not working for RO reports
- Fixed SB "from email" showing on email preview form instead of RO "from email"

#### V 1.5.2 (13SEP2010)

- Added "Content-disposition" tags to email attachment headers (necessary for some email encryption services)

#### V 1.5.1 (13SEP2010)

- Added ability to add an attachment to outgoing emails
- Added ability to send report cards, infraction reports, and schedules from Registrar's Office (optional upgrade)
- Added option to create a performance log for diagnostics

#### V 1.1.2 (08JUN10)

- Added SSL encryption option for SMTP settings

V 1.1.1 (08DEC09)

- Added multi-select list for multiple email (contact) types
- Added function to request read receipts from recipients
- Added option to apply grid lines to statements
- Added option to replace label "STATEMENT" with custom text

V 1.0.2 beta (MAY09)

- Fixed PDF template file location
- Fixed .NET Framework 3.5 dependency
- Fixed AxXStandard wrapper class issue

V 1.0.0 beta (MAY09)

- Initial beta release