

Send letters efficiently.  
Payment reminders, automatically.



**SMAILD**

**bexio**

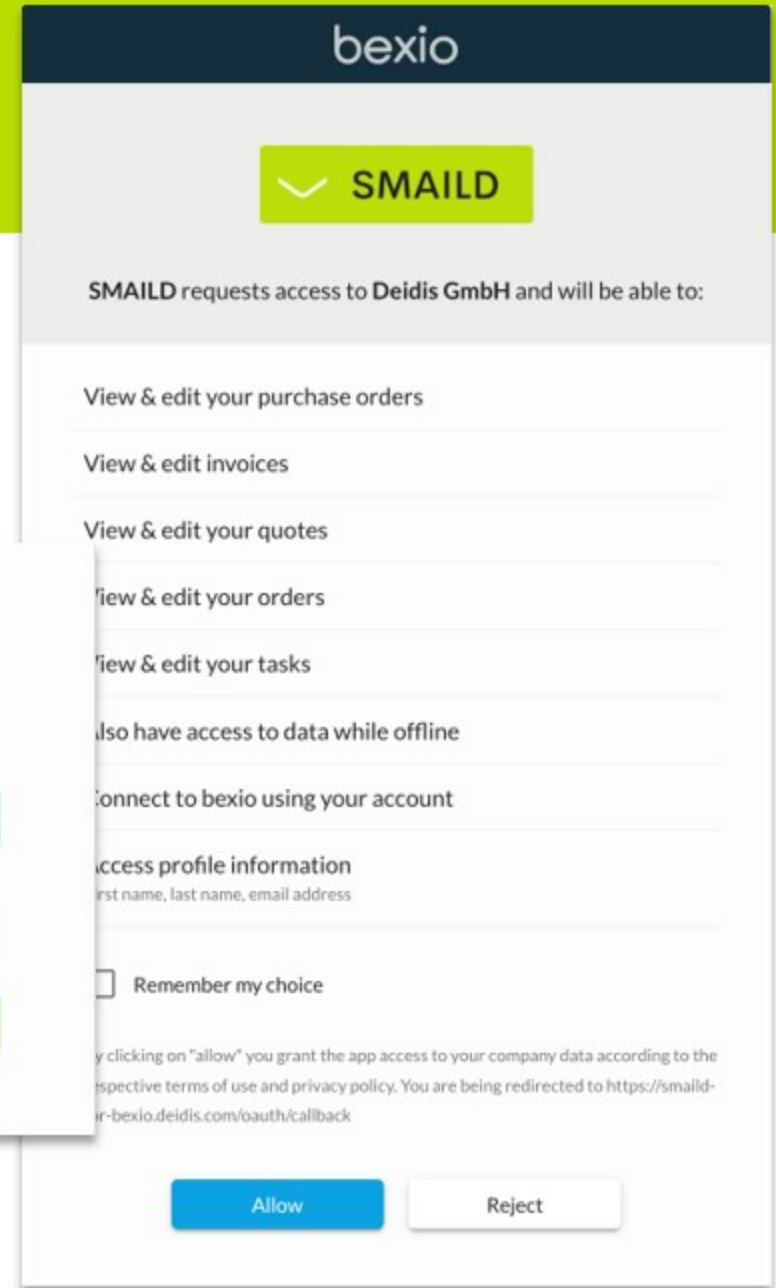
# Install the app to Bexio

- Start the installation process
- Login with your Bexio account
- Allow SMAILD to access Bexio on your behalf

**NOTE:** You don't need to create a new account with SMAILD, simply login with Bexio.



The image shows a login form for Bexio. At the top is the Bexio logo. Below it are two input fields: 'Email address' with the placeholder 'example@my-company.com' and 'Password' with a masked password '\*\*\*\*\*'. A green 'Login' button is positioned below the password field. At the bottom of the form is a blue link that says 'Forgot password?'.



The image shows a mobile app authorization screen for SMAILD. At the top is the Bexio logo. Below it is a green button with a white checkmark and the text 'SMAILD'. Underneath, it states 'SMAILD requests access to Deidis GmbH and will be able to:'. A list of permissions follows: 'View & edit your purchase orders', 'View & edit invoices', 'View & edit your quotes', 'View & edit your orders', and 'View & edit your tasks'. Below the list, it says 'You will also have access to data while offline'. A section titled 'Connect to bexio using your account' includes 'Access profile information' (first name, last name, email address) and a checkbox for 'Remember my choice'. At the bottom, there are two buttons: 'Allow' (blue) and 'Reject' (white).

# SMAILD installation wizard

INSTALLATION WIZARD

## Welcome to SMAILD

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SMAILD has been created in collaboration with [Bexio](#) and [Pingen](#), who guarantees fast mail delivery and the lowest prices for sending worldwide.

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Cancel

Continue →

# Do you have your own Pingen account?


With SMAILD you don't need to have your own Pingen account.


However, if you do have it, feel free to connect it - then you will pay for postage directly to Pingen.


STEP 1 OF 3


## Mail Handling Settings

Let's configure how your letters should be processed

Connection to Pingen (optional) 

Use your own Pingen account   [Connect](#)

*optional* 

 To use SMAILD you do not need a Pingen account. However, if you already have it, feel free to use it. [> Show more information](#)

# Basic settings

Make sure that the envelope window coincides with your Bexio templates.

## Printing and dispatching

[Price list](#)

### Print in color

Colored printing is a bit more expensive, and normally not necessary



### Print on both sides

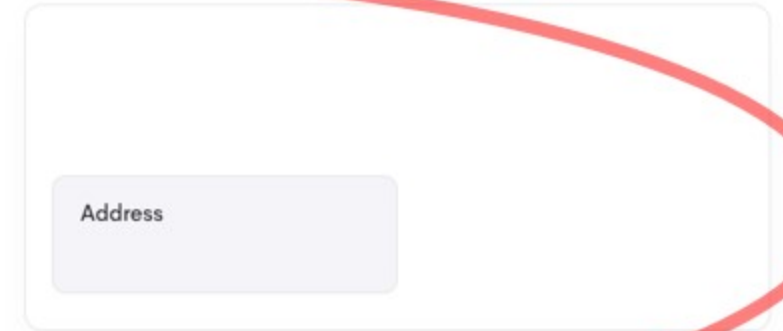
Printing on both sides is not very usual



### Envelope window

On which side of the letter the recipient address is located. You have it configured in your Bexio [document templates](#)

Left  Right



### Delivery method

When sending letters abroad, independently of your choice, DHL Priority will be used

A Mail (priority)  B Mail (economy)

# Postage costs

If you do not use your own Pingen account we will charge 0.10 per letter on top of standard Pingen pricing.

## Example:

Sending a QR bill made of 2 pages by A Mail to a Swiss customer, printed in black/white.

**CHF 2.17 (incl. VAT)**

COST ITEM	UNIT	PRICE (EXCL. VAT)
Envelope	letter	CHF 0.4
Simple blank paper	sheet	CHF 0.05
Special paper (e.g. QR, ESR, ESR+)	sheet	CHF 0.15
Printing in grayscale	page	CHF 0.1
Printing in color	page	CHF 0.2
<u>Dispatching to Pingen</u>	letter	CHF 0.1
DELIVERY COSTS		
B Mail (economy) in Switzerland	letter (1-16 sheets)	CHF 0.83
A Mail (priority) in Switzerland	letter (1-16 sheets)	CHF 1.02
A Mail Plus (track & trace) in Switzerland	letter (1-16 sheets)	CHF 2.23
Registered mail in Switzerland	letter (1-16 sheets)	CHF 4.95

# Subscription plans

- Send letters directly from Bexio
- Get letter status notifications
- Use B Mail, A Mail, A Mail Plus, Registered mail
- Send payment reminders per post automatically
- 14 days FREE trial

STEP 2 OF 3

## Subscription Plan

You can modify or cancel the subscription at any time

14 DAYS FREE TRIAL

ESSENTIAL

CHF **20.-**  
PER MONTH

Send directly from Bexio

Letter status notifications in Bexio

Auto-send payment reminders

ESSENTIAL + CHF 5.-  
PER MONTH

A Mail Plus, Registered mail

14 DAYS FREE TRIAL

PRO

CHF **30.-**  
PER MONTH

Send directly from Bexio

Letter status notifications in Bexio

Auto-send payment reminders

PRO + CHF 5.-  
PER MONTH

A Mail Plus, Registered mail

# Subscription is required

We need you credit card for:

1. Postage fees  
(automatic top-up)
2. Subscription fee  
(monthly invoice)

**NOTE:** if you're using your own Pingen account, SMAILD will not charge you for postage.

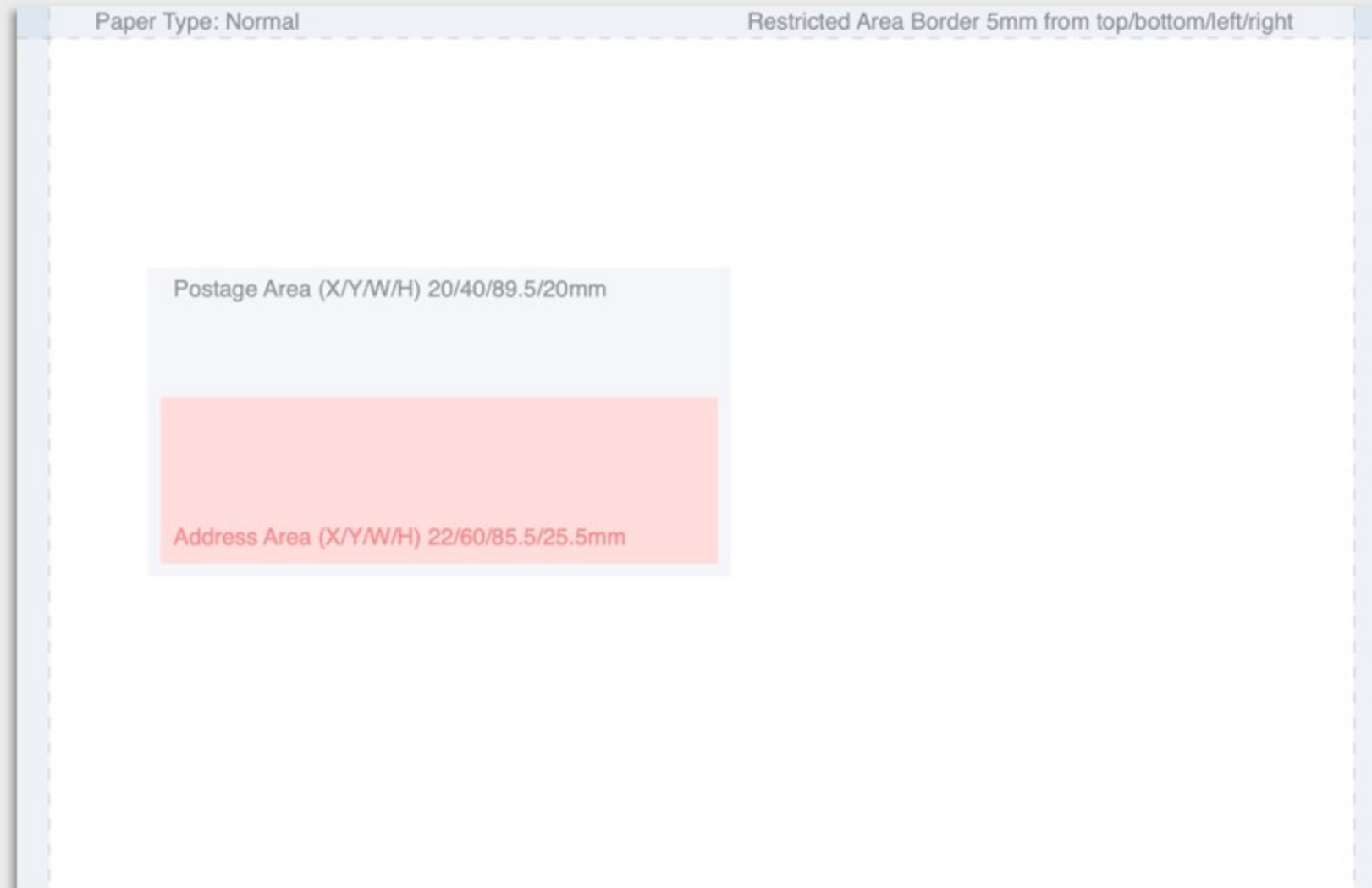
### Available credit for sending letters

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**Automatic top-up**  
When your credit falls below the defined threshold, we will automatically top up the specified amount

Threshold		Amount to be topped up	
CHF	10	CHF	50

# Prepare for sending



1

## SETTINGS

## Mail handling

General   Auto-send payment reminders   Allowed PDF senders

2

Validate letters →

- Navigate to letter validation
- Upload a PDF from Bexio (e.g. invoice or reminder)
- See if it passes the validation

## SUPPORT

## Validate letters

Upload your PDF

[Address placement instructions](#) ↓

Choose file

No file chosen

3

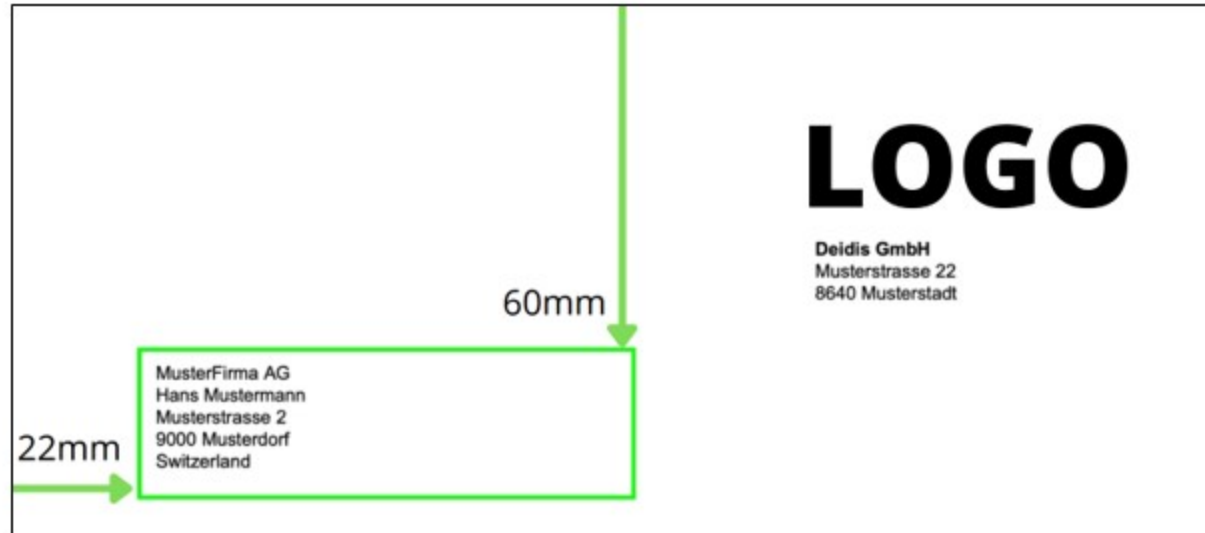
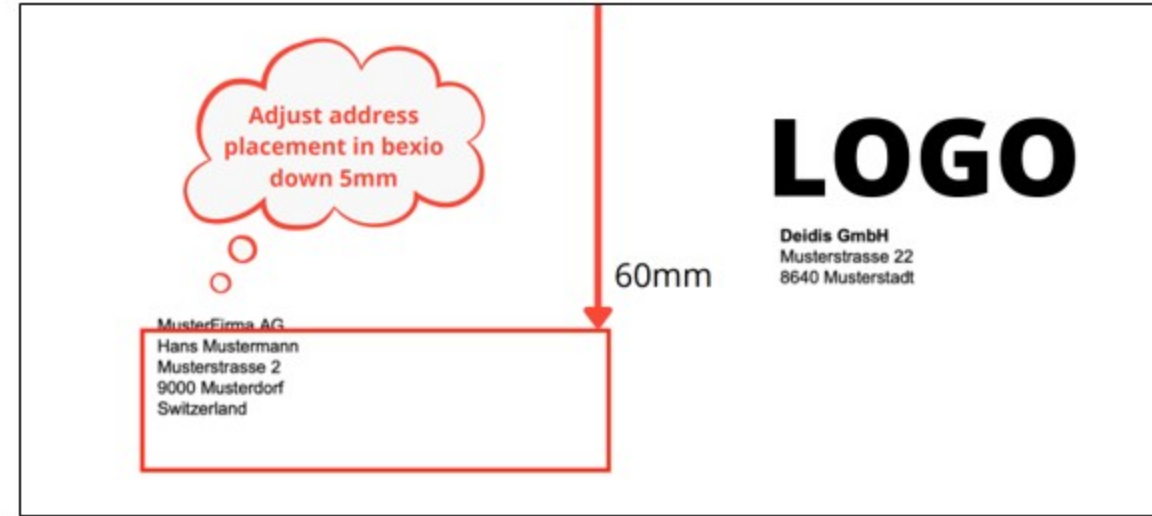
Make sure the recipient address on the first page of your PDF fits into the 'Address Area' box.

Paper Type: Normal

Restricted Area Border 5mm from top/bottom/left/right

# Positioning the address correctly (left side)

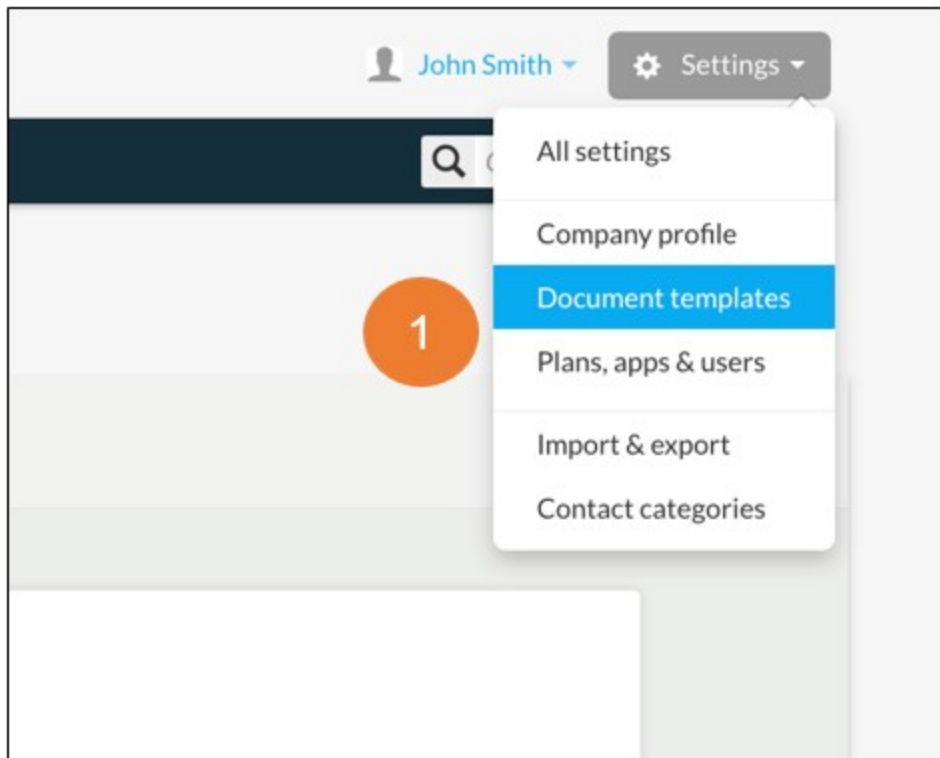
Default settings in Bexio have the address box 5mm too high. You might need to adjust that.



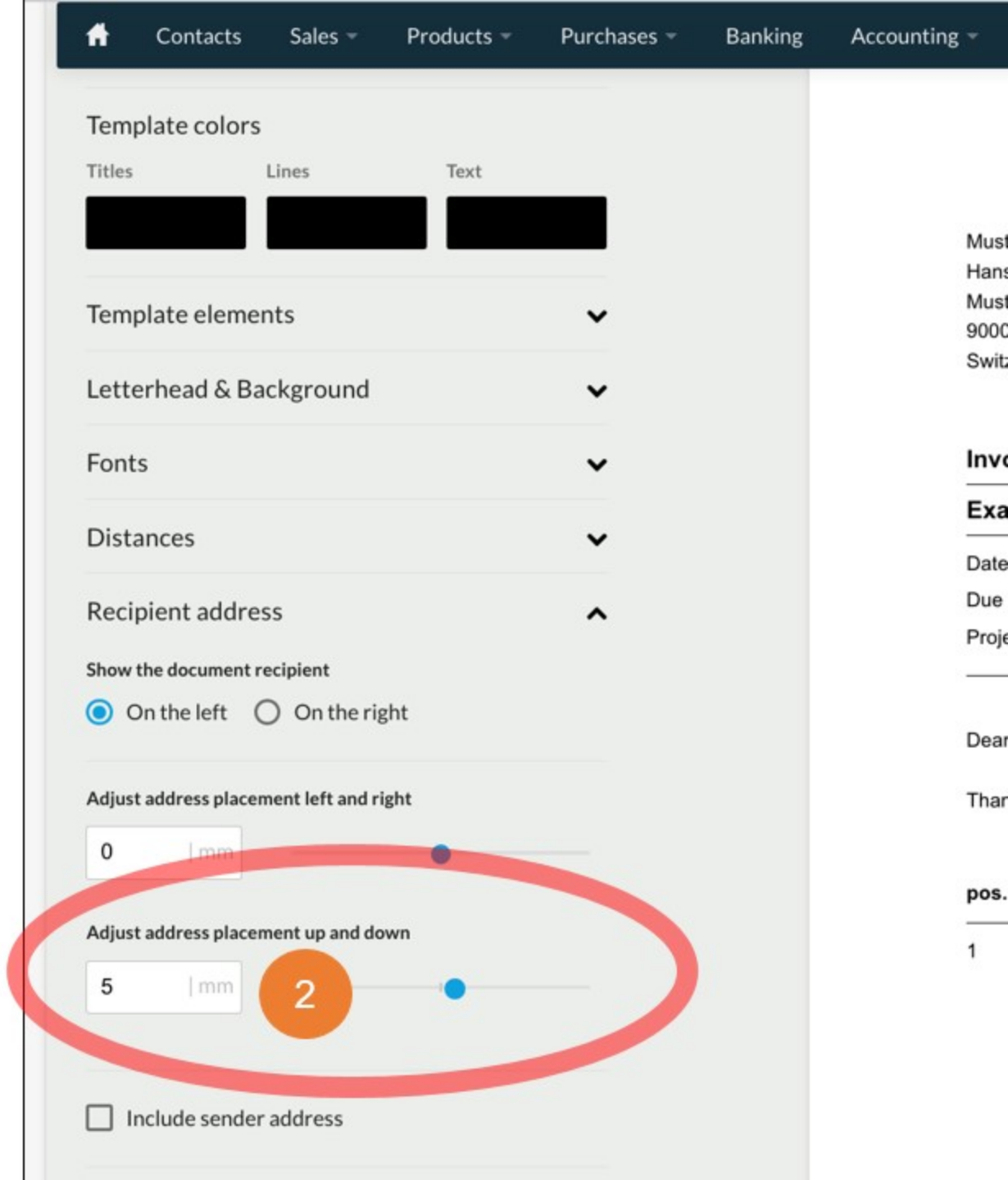
# Positioning the address correctly (right side)

Default settings in Bexio have the address box 5mm too high. You might need to adjust that.





- Edit document templates on Bexio
- Adjust the positioning 5mm from the top



# Validation passed!

Only valid letters are sent by post:

- You will be charged only when the letter is sent
- If the delivery fails, and the letter is returned – it will be destroyed without opening (but not refunded)

**NOTE:** you'll receive a notification whenever something significant is happening to the letter.

SMAILD Installed

SUPPORT

## Validate letters

Upload your PDF [Address placement instructions](#)

Choose file Default template.pdf

✓ PDF is valid for sending

Make sure the recipient address on the first page of your PDF fits into the 'Address Area' box.

Paper Type: Normal Restricted Area Border 5mm from top/bottom/left/right

**deidis.**

Deidis GmbH  
Musterstrasse 22  
8640 Musterstadt

Address Area (X/Y/W/H) 22/60/85.5/25.5mm

MusterFirma AG  
Hans Mustermann  
Musterstrasse 2  
9000 Musterdorf  
Switzerland

Invoice RE-00001

Example invoice

Date:	05.10.2016	Contact person:	Hauschild Leonardo
Due date:	03.11.2016	Order number:	AU-00003

# Sending letters

Accounting ▾ Apps ▾ Payroll ↗ Quick find

New invoice ⋮

**Credit notes**  
0.00 CHF

**Pending amount**  
3'769.50 CHF

Reminders Address Texts Document flow Settings

Quantity	Individual price	Discount	Price in CHF
1.00	3'500.00 <small>(UN77 - Revenue (NS) 7.70%)</small>		3'500.00 <small>Sonstige Erlöse</small>
			3'500.00
			269.50
			<b>3'769.50</b>

STATUS  
**Pending** 🗑️ 🔔

STATUS ACTIONS

- 📧 Invoice is paid
- 📄 Create credit note
- ✎ Edit invoice again
- ✖ Cancel invoice

SEND

- 📧 Email invoice ▾
- ✉ **Send by post** ←

ACTIONS

- 🖨 Print invoice (PDF) ▾
- 🌐 View in bexio network
- 📄 Duplicate invoice

# Use the browser extension

The image shows a screenshot of the SMAILD web interface. At the top left, there is a green header with a checkmark icon, the text 'SMAILD', and a green 'Running' status badge. Below this, a yellow banner contains a notification: 'For the ultimate convenience, please install the SMAILD browser extension. It will let you...'. A red circle highlights this notification, and a red arrow points to a blue link that says 'Download for Google Chrome' with an external link icon. A red circle with the number '1' is placed next to the link. Below the notification, the page shows an 'OVERVIEW' section with the heading 'Activity' and a sub-section 'General' with the text 'Automatic payment reminders'. On the right side, a dropdown menu is open, showing various actions for an invoice. The menu items are: 'STATUS' (Pending), 'STATUS ACTIONS' (Invoice is paid, Create credit note, Edit invoice again, Cancel invoice), 'SEND' (Email invoice, Send by post), and 'ACTIONS' (Print invoice (PDF), View in bexio network, Duplicate invoice). A red arrow points to the 'Send by post' option, and a red circle with the number '2' is placed next to it.

1

2

When you install the browser extension, the “Send by post” button will appear

# (Alternatively) Use the magic inbox

If you want to send letters without the browser extension, you can send the PDF to:

[bexio@smaild.deidis.com](mailto:bexio@smaild.deidis.com)

All users in your company can do it (even if they are not using Bexio)

**NOTE:** if you have multiple Bexio accounts your magic inbox will be different. Find it on the settings page.

320223416

To: customer@example.com X CC BCC

BCC: bexio@smaild.deidis.com X

Reply to: Finance (Deidis GmbH) (finance@deidis.com)

Subject: Invoice

Send copy to finance@deidis.com Apply template

Dear Sir or Madam

We thank you for your order.

Please use the following link to view and pay the invoice:  
[Network Link]

Please pay by means of one of the available payment methods.  
If you have any questions concerning this invoice, please do not hesitate to contact us at any time.

Files

re-22010.pdf 103 kB X

Send Invoice Cancel

# Automatic payment reminders

✓ SMAILD Installed ⚙️ ? 👤 🏠 Dashboard →

SETTINGS

## Mail handling

General Auto-send payment reminders Allowed PDF senders

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**Auto-send payment reminders** [Payment reminders in Bexio ↗](#)

Send payment reminders by post automatically

When a payment reminder is created in Bexio, SMAILD will send a dunning letter by post

- Navigate to the settings
- Enable the automatic payment reminder sending

**NOTE:** you need the PRO subscription plan for this.

## SETTINGS

## Mail handling

General

Auto-send payment reminders

Allowed PDF senders

### Auto-send payment reminders

[Payment reminders in Bexio](#) 

### Send payment reminders by post automatically

When a payment reminder is created in Bexio, SMAILD will send a dunning letter by post

2



# Configure the auto-sending of payment reminders

- Define how you want your payment reminders to be sent
- SMAILD will only send reminders that appear in Bexio after you enabled this feature
- You'll have 1h to cancel the sending

## Auto-send payment reminders [Payment reminders in Bexio](#)

**Send payment reminders by post automatically**  
When a payment reminder is created in Bexio, SMAILD will send a dunning letter by post

Valid from 31.01.2023

Every payment reminder created on Bexio will be processed automatically by SMAILD every hour. You can use manual payment reminder runs as well as automatic payment reminders in Bexio.

Reminder level 1	Don't send by post	▼
Reminder level 2	Send by post - B Mail (economy)	▼
Reminder level 3	Send by post - A Mail (priority)	▼

[+](#) Please note that adding a configuration for a payment reminder level here, does not affect your [dunning settings in Bexio](#)

# Notifications

SMAILD will add a comment for offers, quotes, invoices and payment reminders.

As documents are associated with a contact partner, Bexio will additionally send an email notification.

**NOTE:** when you send non-Bexio documents per email to SMAILD, the communication will happen via email.

The screenshot displays the Bexio software interface. At the top, there is a navigation bar with tabs for Contacts, Sales, Projects, Products, Purchases, and Banking. Below this, the 'Quotes' section is active, showing a quote titled 'Quote AN-22001 - deidis'. The quote details include a title 'test quote' and a table with one item: 'Services' with a quantity of 1.0. Below the table, there is a section for 'Amount tax exempt' and an 'Add item' button. A comment section is visible, with a comment that reads 'an-22001.pdf is sent out by post' dated '30.01.2023 05:36 - SMAILD'. A red circle highlights this comment. To the right, a 'Preview' window shows 'DOCUMENT INFORMATION' with 'Internal contact partner: Johan Smith' and 'Date: 25.10.2022', also circled in red. The 'Last edited on' date is '31.01.2023 14:39'.

Contacts Sales Projects Products Purchases Banking

Quotes >  
Quote AN-22001 - deidis

Title: test quote

Items Conditions Address Texts Document flow Settings

Add standard position Add product + More items

Type	Item	Description	Quantity
	1	Services	1.0

Amount tax exempt

+ Add item

Internal Public This comment is only visible to...

Write a comment ...

an-22001.pdf is sent out by post  
30.01.2023 05:36 - SMAILD

Preview  
Edit template

DOCUMENT INFORMATION  
Internal contact partner:  
Johan Smith  
Date:  
25.10.2022  
Last edited on:  
31.01.2023 14:39



Send letters efficiently.  
Payment reminders, automatically.

<https://smaild.com>

Thank you!