

BATCH EMAIL DISTRIBUTION

[1.0]

Crimsen

[24/11/2021]



QNE
SOFTWARE

QNE TIPS

Product : QNE Optimum


Version: 1.00

Doc No : 1

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REV. No	Nature of Change	Prepared By	Prepared Date	Reviewed & Approved by
1.0	Creation	Crimsen	24/11/2021	

Amendment Record

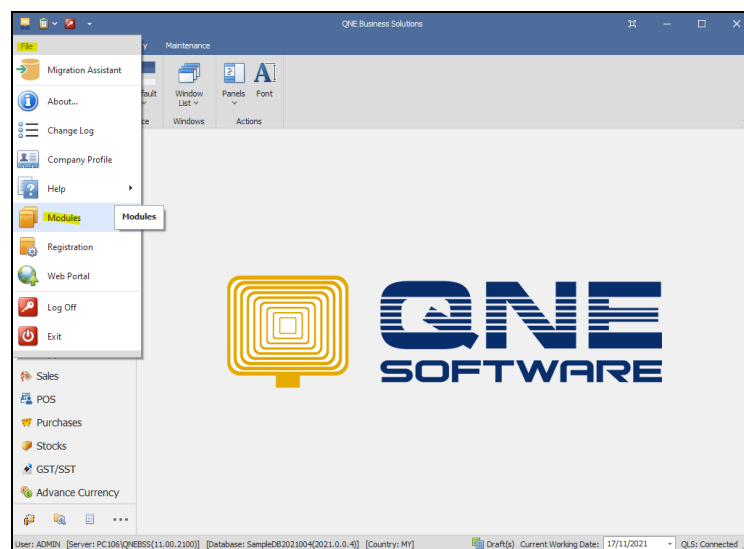
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SCENARIO

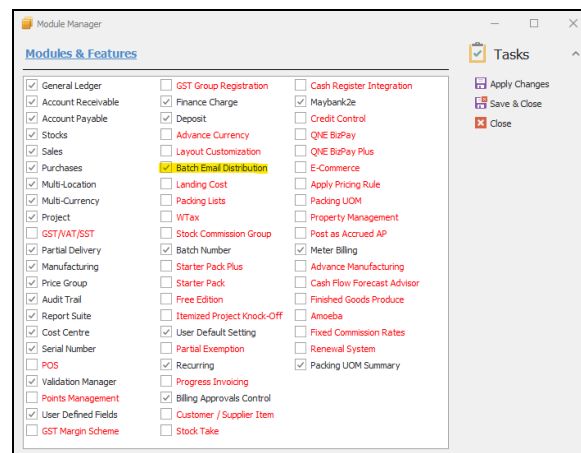
User requests to sending statement of account every end of month to all customers. Instead of generate the statement and send out the email 1 by 1, user is looking for a function which can send the statement by batch via email.

SOLUTION

1. Go to File > **Module**

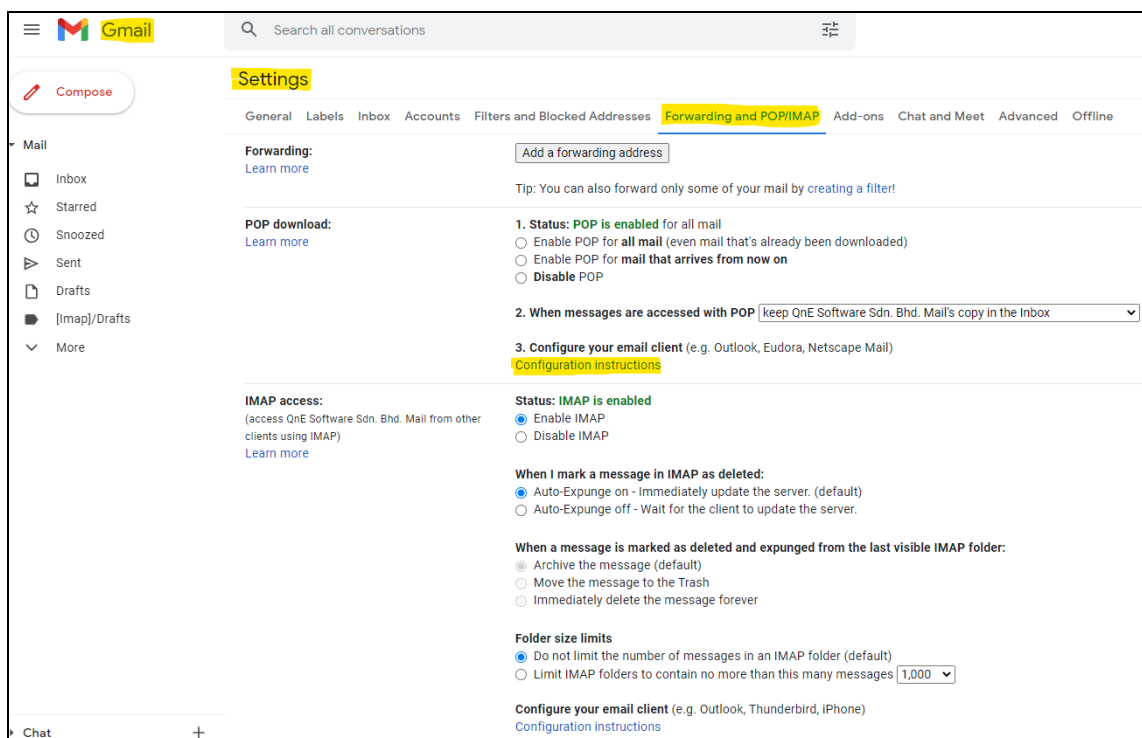


2. Tick **Batch Email Distribution**. Save & Close




EMAIL ACCOUNT USER CONFIGURATION

1. Get Gmail information from Settings > Forwarding and POP/IMAP > Configuration instructions

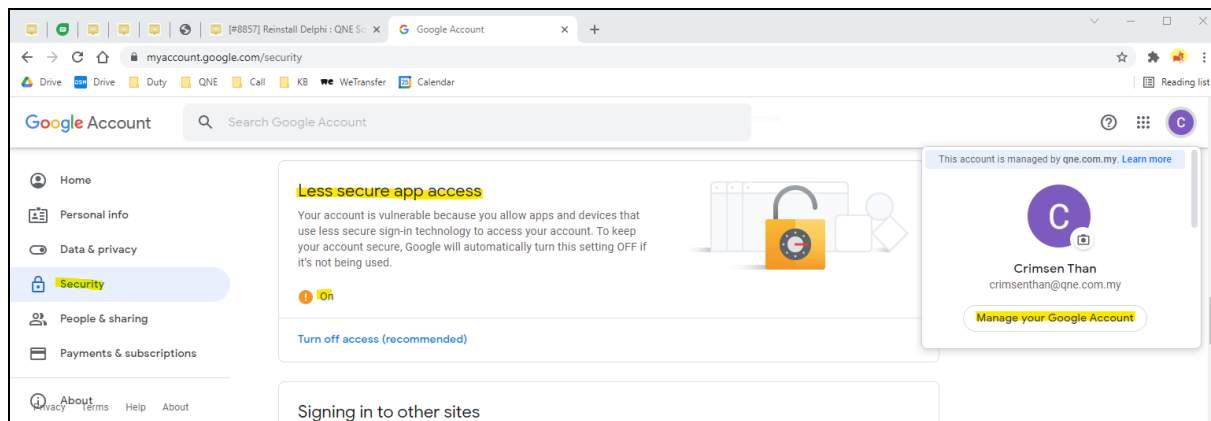


Write down the Outgoing Mail (SMTP) Server and Port Number
[Picture A]

Next, make changes on your email client	
Go to your client, like Microsoft Outlook, and check these settings.	
Incoming Mail (POP) Server	pop.gmail.com Requires SSL: Yes Port: 995
Outgoing Mail (SMTP) Server	smtp.gmail.com Requires SSL: Yes Requires TLS: Yes (if available) Requires Authentication: Yes Port for TLS/STARTTLS: 587 If you use Gmail with your work or school account, check with your administrator for the correct SMTP configuration.
Server timeouts	Greater than 1 minute (5 is recommended)
Full Name or Display Name	Your name
Account Name, User Name, or Email address	Your email address
Password	Your Gmail password

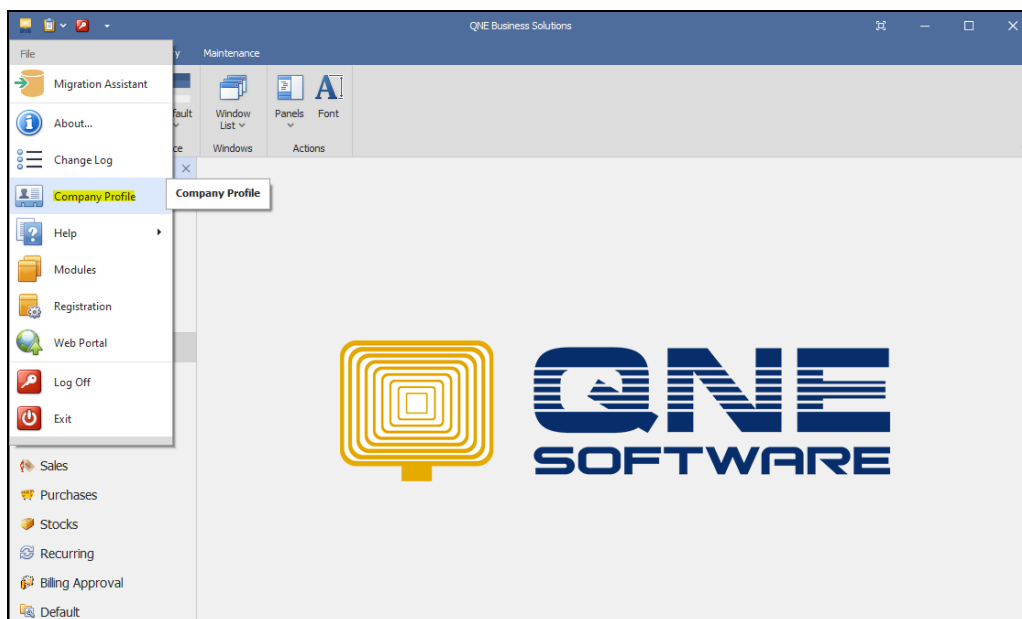
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2. In Security, kindly switch on **Less secure apps access**



SETUP EMAIL

1. If you want to send email by **company** account, Go to **Company Profile** to setup email address



Click **Email Setting**. Enter SMTP Server and Port found in picture A (Page 3)

Most common used port for email:

Port: **465 – SSL**

Port: **587 – TLS**



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Navigation: Dashboard, Overview, General Ledger, Customer, Supplier, Sales, Purchases, Stocks, Recurring, Billing Approval, Default.

Company Profile

Company Name: QNE Software Sdn Bhd

Reg No.:

GST Approval No.:

Sales Tax Reg No.:

Address 1:

Address 2:

Address 3:

Address 4:

Zip Code:

User Email Settings

Email: admin@qne.com.my

SMTP Server: smtp.gmail.com

SMTP Port: 587

User Name: admin@qne.com.my

Password: *****

☐ This server requires an encrypted connection (SSL)

OK Cancel

If you want to send email by **personal** account, Go to **Maintenance > Users** to setup email address

Navigation: My Details, User Roles, Users, Projects, Cost Centres, Financial Period, Valid Posting Periods, Default Interface, Accounts, Currencies, Terms, Areas, System Options, Running Numbers, Meter Billing, Account Setup, Posting, Account Groups, User Default Form Format.

Security System User

User Name: ADMIN ☒ Active ☐ Change Password On First Logon

Full Name:


Email: crimsenthan@qne.com.my **Email Setting**

Remarks:

Signature: Double click to open sele...

Roles

Name	Administrative	Can Edit Model
Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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crimsenthan@qne.com.my - User Email Settings

Email: crimsenthan@qne.com.my

SMTP Server: smtp.gmail.com

SMTP Port: 587

User Name: crimsenthan@qne.com.my

Password: *****

☐ This server requires an encrypted connection (SSL)

OK Cancel

2. Key in customer email address

700-C001 - Customers - QNE Business Solutions

File Home Edit Task Info View Tools Inquiry Maintenance

New Save Save and Close Save and New Audit Trail Online Help Reset View Settings View Variants Previous Record Next Record Credit Search Info Close

Records Creation Save View Records Navigation Close

Navigation Statement of A ABC - Company Customers 700-C001 - Cust

Customer

Customers

Customer Name: CARE SOFTWARE SOLUTIONS

☐ Group Company: CARE SOFTWARE SOLUTIONS

Control Account: 700-0000

Customer #: 700-C001 Auto Code

Registration #: 323545-A

Sales Tax Reg No. Service Tax Reg No.

Status: ACTIVE

Start Date: 04/10/2021

Category: Group: Group Company:

Details Picture Customer Price Others Member Delivery Addresses Notes Files

Homepage

Address: 123, JALAN SBC 1, TAMAN GOMBAK, SELANGOR, Zip Code:

Contact Person: MR. SIM

Email: tkfoo@qne.com.my

Phone #: 03-6188 6188

Phone 2 #: 03-6188 6085

Fax #: 03-6188 3023

Fax 2 #:

Sales Tax Exemption No. Expiry Date:

Misc

Business Nature: SOFTWARE RESELLER

Area: C.O.D.

Agent: Price Group: Account Group: Currency: MYR Current Balance: 3,360.00

[Server: PC106\QNESS_TEST(14.00.1000)] [Database: ABC(2021.1.0.3)] [Country: MY] [Language: en-MY] [Company: ABC] User: ADMIN

Draft(s) Current Working Date: 18/11/2021 QLS: Connected



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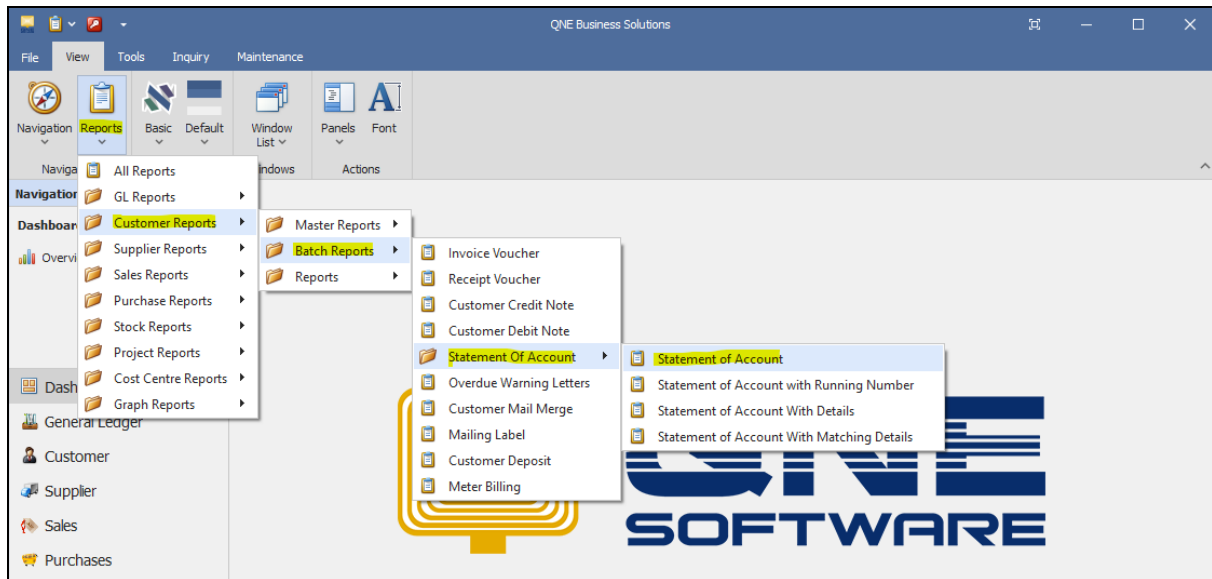
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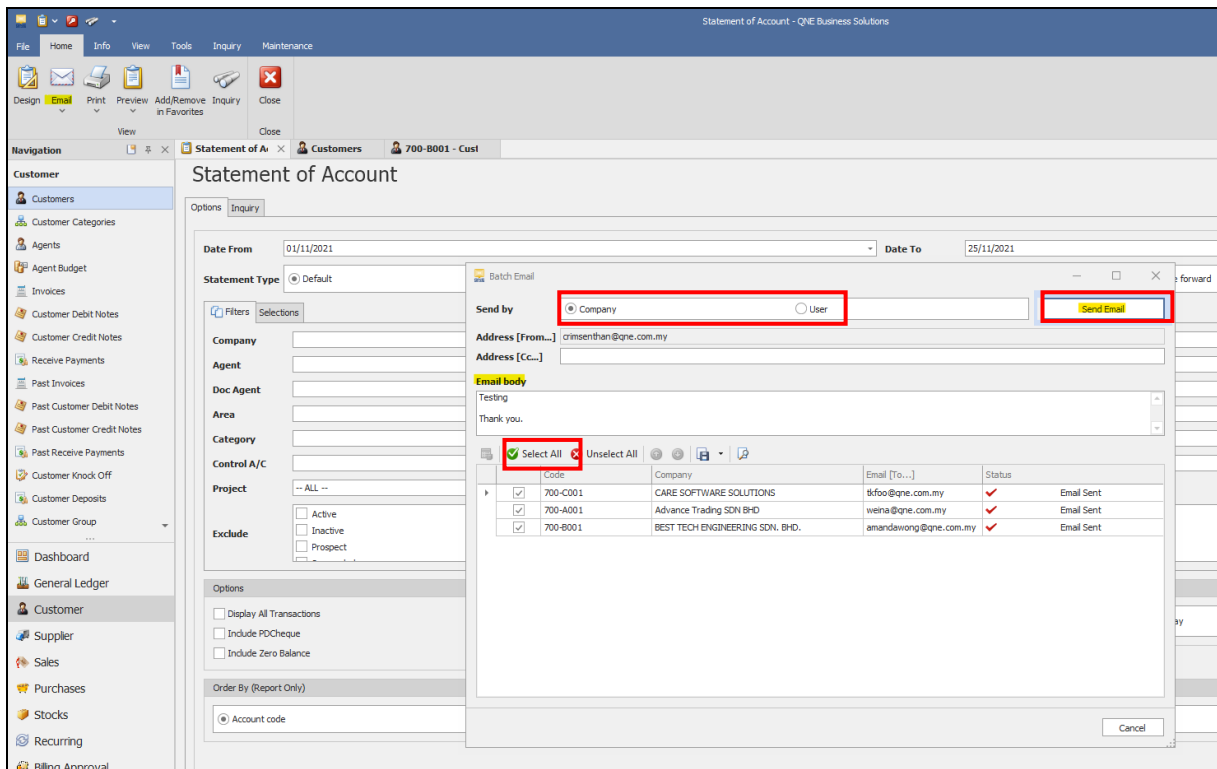
- Go to View > Reports > Customer Reports > Batch Reports > **Statement of Account**




- Click **Email** at upper left corner.

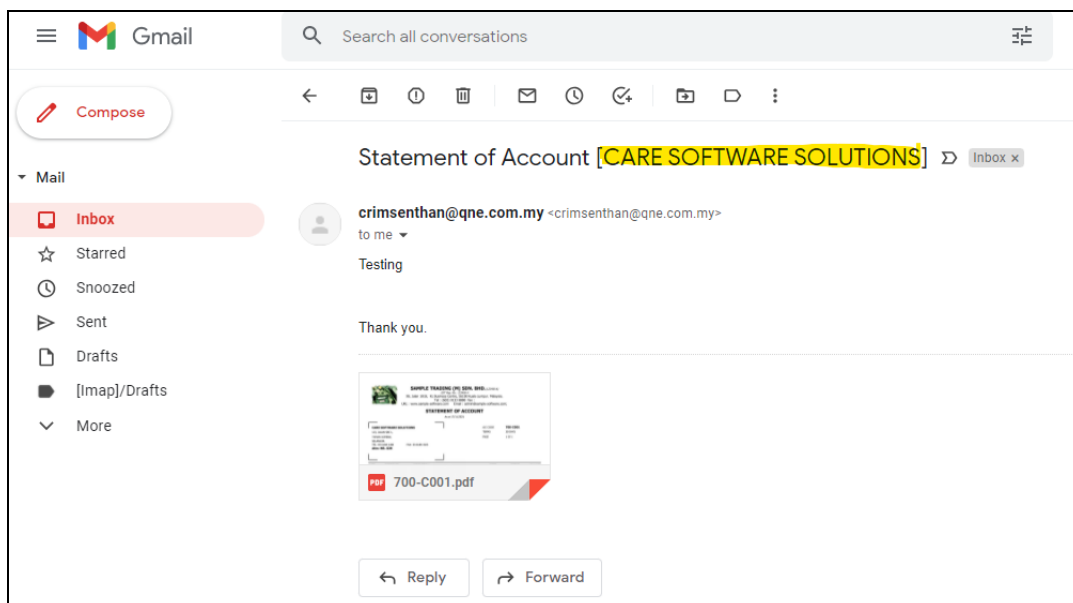
Select Sent by Company or User. Amend Email Body if you want

Select multiple customers. Click **Send Email**.



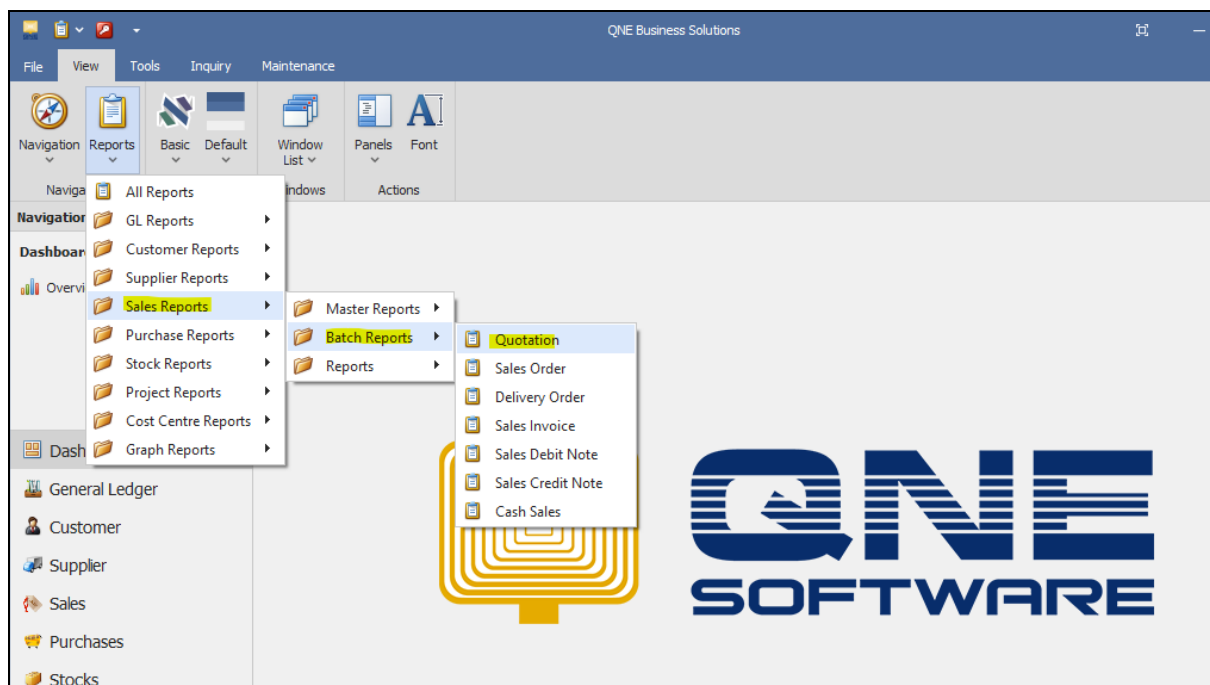
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5. Customer will receive the email as below together with Statement of Account



Remark:

Batch Email Distribution applies not only on Customer module, but also **Sales, Purchase** and **Supplier** modules. For example, View > Reports > Sales Reports > Batch Reports > Quotation





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Quotation - QNE Business Solutions

File Home Info View Tools Inquiry Maintenance

Design Email Print Preview Add/Remove in Favorites Inquiry Close

View Close

Quotation

Options Inquiry

<input checked="" type="checkbox"/> Doc Date	Between	01/11/2021	And	25/11/2021
<input checked="" type="checkbox"/> Doc Code	Between	N/A	And	N/A
<input checked="" type="checkbox"/> Company Code	Between	N/A	And	N/A
<input checked="" type="checkbox"/> Customer Agent	Between	N/A	And	N/A
<input checked="" type="checkbox"/> Document Agent	Between	N/A	And	N/A
<input checked="" type="checkbox"/> Area Code	Between	N/A	And	N/A
<input checked="" type="checkbox"/> Category Code	Between	N/A	And	N/A
<input checked="" type="checkbox"/> Control A/C Code	Between	N/A	And	N/A
<input checked="" type="checkbox"/> Location Code	Between	N/A	And	N/A
<input checked="" type="checkbox"/> Project	Between	N/A	And	N/A
<input checked="" type="checkbox"/> CostCentre	Between	N/A	And	N/A