BATCH EMAIL DISTRIBUTION

[1.0]

Crimsen [24/11/2021]



Doc No : 1

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

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User: ADMIN [Server: PC 106\QNEBSS	(11.00.2100)] [Da	atabase: SampleDB2	021004(2021.0.0.4)]	[Country: MY]	🛅 Draft(s) Current Working Da	te: 17/11/2021	- Q	S: Connec	ted

2. Tick Batch Email Distribution. Save & Close





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GMAIL ACCOUNT USER CONFIGURATION

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

≡	M Gmail	Q Search all conversations	크는
1	Compose	Settings	
		General Labels Inbox Accounts Filter	rs and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat and Meet Advanced Offline
 Mail 		Forwarding:	Add a forwarding address
	Inbox	Learn more	Tip: You can also forward only some of your mail by creating a filter!
☆	Starred		· · · · · · · · · · · · · · · · · · ·
()	Snoozed	POP download: Learn more	 Status: POP is enabled for all mail Enable POP for all mail (even mail that's already been downloaded)
⊳	Sent		Enable POP for mail that arrives from now on
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	[Imap]/Drafts		2. When messages are accessed with POP keep QnE Software Sdn. Bhd. Mail's copy in the Inbox 🔹
~	More		 Configure your email client (e.g. Outlook, Eudora, Netscape Mail) Configuration Instructiona
		IMAP access: (access QnE Software Sdn. Bhd. Mail from other clients using IMAP) Learn more	Status: IMAP is enabled Enable IMAP Disable IMAP
			When I mark a message in IMAP as deleted: Auto-Expunge on - Immediately update the server. (default) Auto-Expunge off - Wait for the client to update the server.
			When a message is marked as deleted and expunged from the last visible IMAP folder: Archive the message (default) Move the message to the Trash Immediately delete the message forever
			Folder size limits ● Do not limit the number of messages in an IMAP folder (default) ○ Limit IMAP folders to contain no more than this many messages 1,000 ✓
 Cha 	t +		Configure your email client (e.g. Outlook, Thunderbird, iPhone) Configuration instructions

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

Next, make changes on your email client						
Incoming Mail (POP) Server						
3	Popularia SCL Van					
	Requires SSL. Tes					
	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

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Personal info	Your account is vulnerable because you allow apps and devices that		C					
	use less secure sign-in technology to access your account. To keep							
Data & privacy	it's not being used.		Crimsen Than					
Security	0.00		crimsenthan@qne.com.my					
• People & sharing	V		Manage your Google Account					
_	Turn off access (recommended)							
Payments & subscriptions								
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Product : QNE Optimum

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SETUP EMAIL

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

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S	Recurring									
ø	Billing Approval									
3	Default									

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

Most common used port for email:

Port: <mark>465 – SSL</mark>

Port: <mark>587 – TLS</mark>

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	Sales Tax Reg No	Email	admin@qne.com.my					
Dashboard		SMTP Server	smtp.gmaii.com	507				
A General Ledger		Serie Port	admin@one.com.mv	307				
	Address 1	Password	*********	-1				
Customer	Address 2		This server requires an encrypted connection (SSL)					
🛹 Supplier	Address 3							
🎨 Sales	Address 4						Email Sett	ting
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If you want to send email by personal account, Go to Maintenance > Users to setup email address

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My Details User Roles Users Proje	Ets Cost Centres Financial Valid Posting Default Interface Currencies Terms Areas System Running Meter Billing Posting User Def Maintenance	ault mat
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Default	Security System User	
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User Default Form Formats	Email crimsenthan@qne.com.my Email Setting	
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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

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Past Invoices		Homepage												
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& Customer		Zip Code				Fax #	03-6188 3	023		Price Group				-
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🛒 Purchases						Expiry Date								
Stocks														
Recurring														
Uetault														
[Server: PC106\QNEBS	S_TEST(14.00.100	00)] [Database: A	ABC(2021.1.0.	3)] [Country: MY] [Lang	uage: en-MY] [Com	npany: ABC] User:	ADMIN			Draft(s) Current	Working Da	te: 18/11/2021	- QLS: Cor	nnected:



3. Go to View > Reports > Customer Reports > Batch Reports > Statement of Account

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Sales Reports	Provide the second s			
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📁 Stock Reports	Customer Debit Note			
🥟 Project Reports	Statement Of Account			
😬 Dash 🥟 Cost Centre Reports	Overdue Warning Letters Statement of Account with Running Number			
Graph Reports	Customer Mail Merge Statement of Account With Details			
🚜 General Leager	Mailing Label Statement of Account With Matching Details			
Customer	🗉 Customer Deposit	-		
🚚 Supplier	Meter Billing			
(Sales	SOFTWAR			
🛒 Purchases		_		

4. 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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Customer	Statemen	t of Account								
Customers	Options Inquiry									
😹 Customer Categories										
Agents	Date From	01/11/2021					• Date To 25	/11/2021		
🔐 Agent Budget	Statement Type	Default	💂 Batc	h Email					- 🗆 ×	forward
Invoices	Statement Type									
Customer Debit Notes	G Filters Selecti	ons	Send b	Y	Company	🔾 User			Send Email	
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🛹 Supplier	Indude PDChe	que								
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Stocks	Account code									1
S Recurring									Cancel	
Biling Approval										



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

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0	Compose	÷		
▼ Mail			Statement of Account [CARE SOFTWARE SOLUTIONS] D	Inbox ×
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~	More		TOO-COO1.pdf	
			← Reply ← Forward	

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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QNE TIPS

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