



BATCH EMAIL DISTRIBUTION

[1.0]

Crimsen

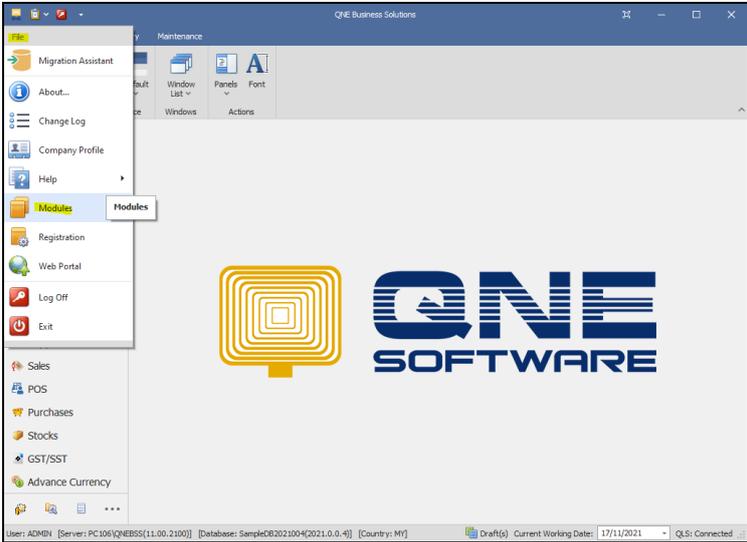
[24/11/2021]

SCENARIO

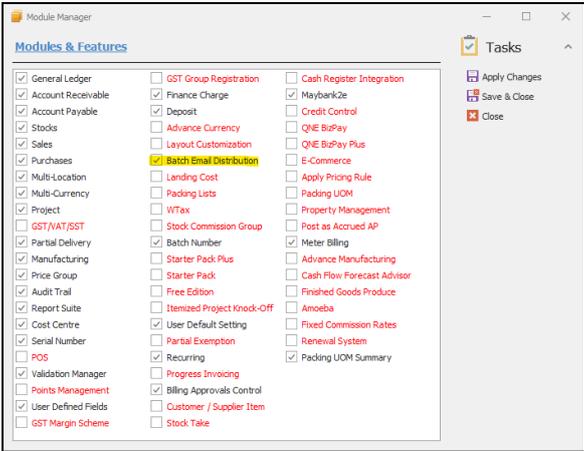
User requests to sending statement of account every end of month to all customers. Instead of generate the statement and send out the email 1 by 1, user is looking for a function which can send the statement by batch via email.

SOLUTION

1. Go to File > **Module**

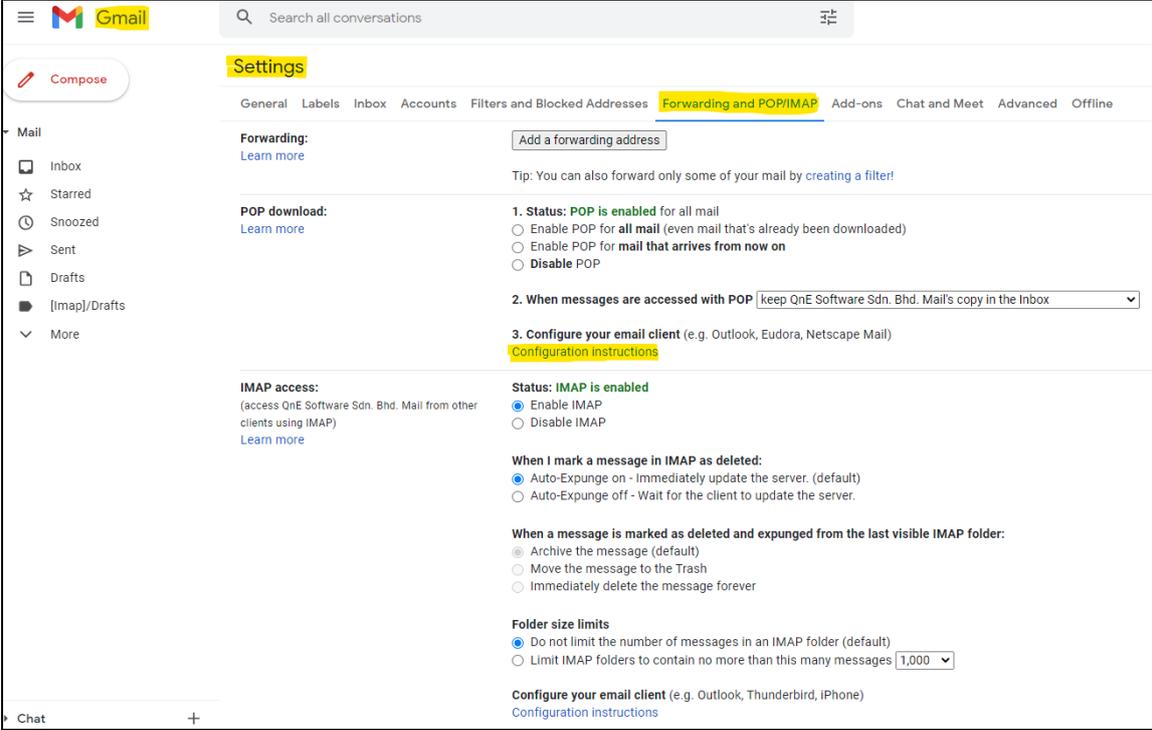


2. Tick **Batch Email Distribution**. Save & Close



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]

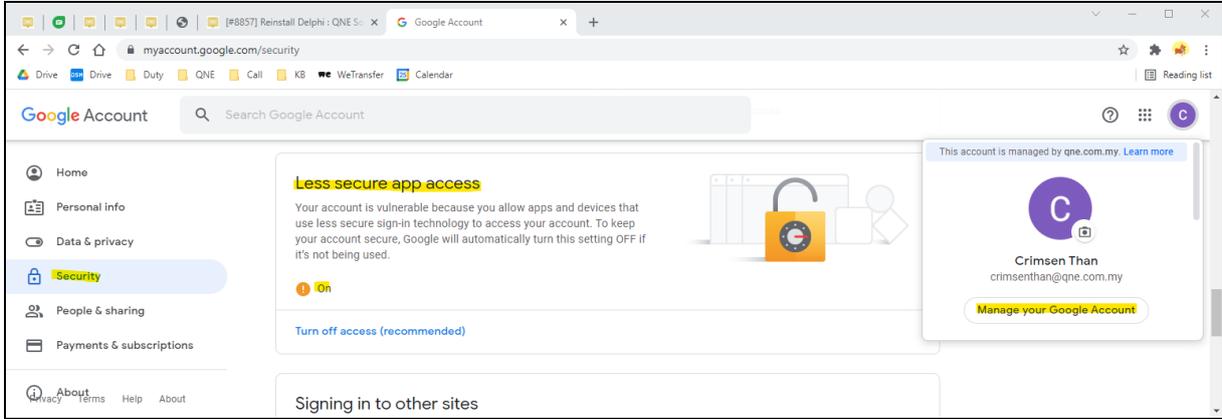
Next, make changes on your email client

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

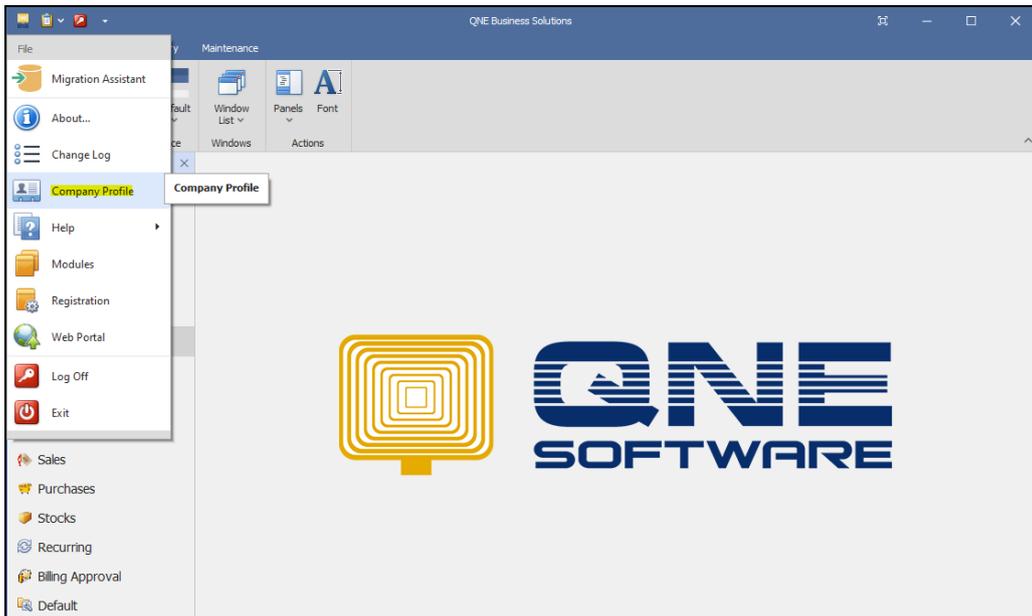
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2. In Security, kindly switch on **Less secure apps access**



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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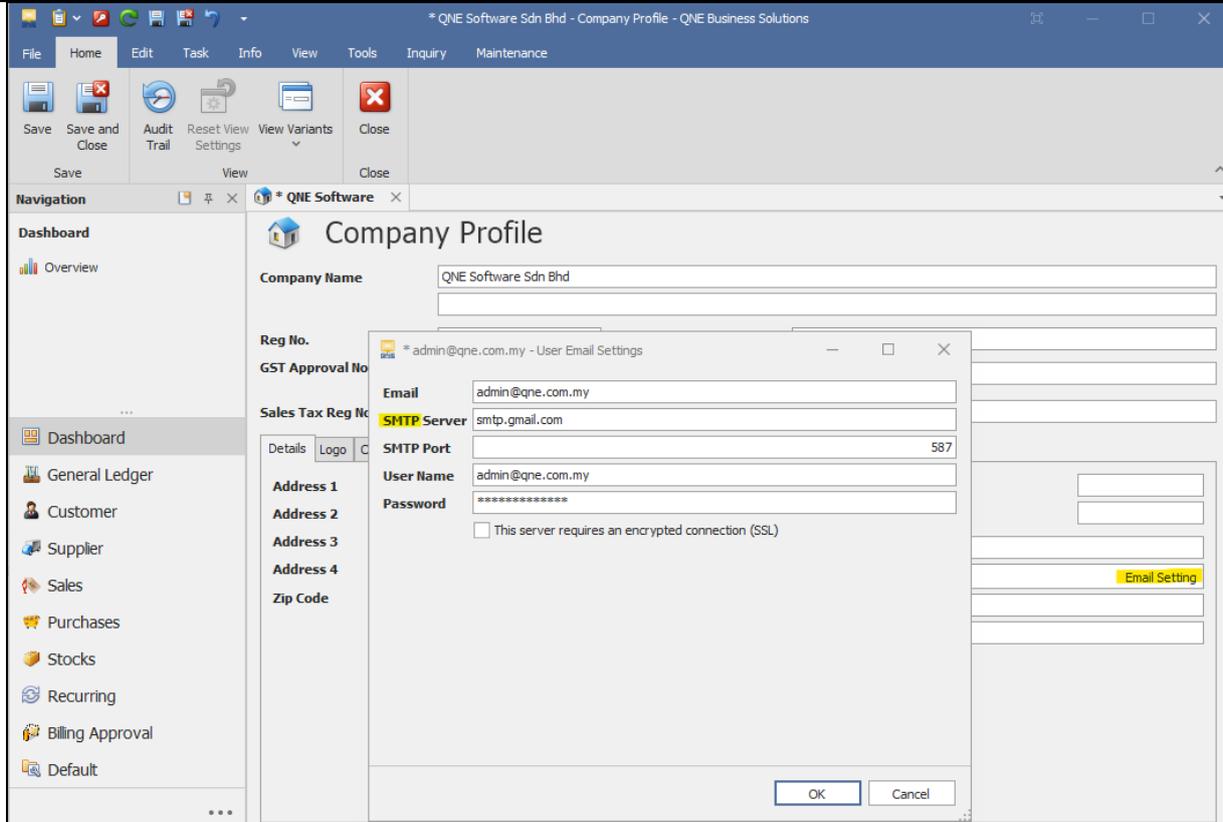
QNE TIPS

Product : QNE Optimum

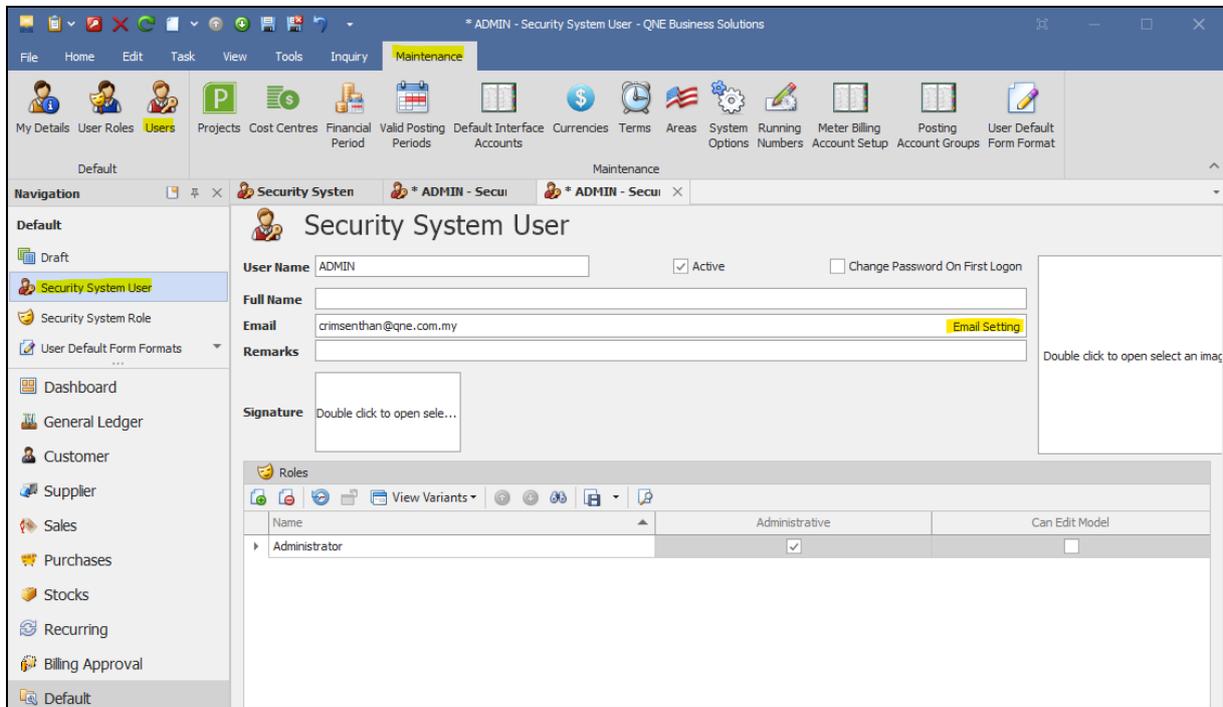
Version: 1.00

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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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crimsenthan@qne.com.my - User Email Settings

Email	<input type="text" value="crimsenthan@qne.com.my"/>
SMTP Server	<input type="text" value="smtp.gmail.com"/>
SMTP Port	<input type="text" value="587"/>
User Name	<input type="text" value="crimsenthan@qne.com.my"/>
Password	<input type="password" value="*****"/>

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 Info Search Close

Records Creation Save View Records Navigation Close

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

Customers

Customer Name: CARE SOFTWARE SOLUTIONS
 Group Company: CARE SOFTWARE SOLUTIONS

Control Account: 700-0000
Customer #: 700-C001 Auto Code
Registration #: 323545-A

Status: ACTIVE
Start Date: 04/10/2021
Category:
Group:
Group Company:

Sales Tax Reg No. Service Tax Reg No.

Details Picture Customer Price Others Member Delivery Addresses Notes Files

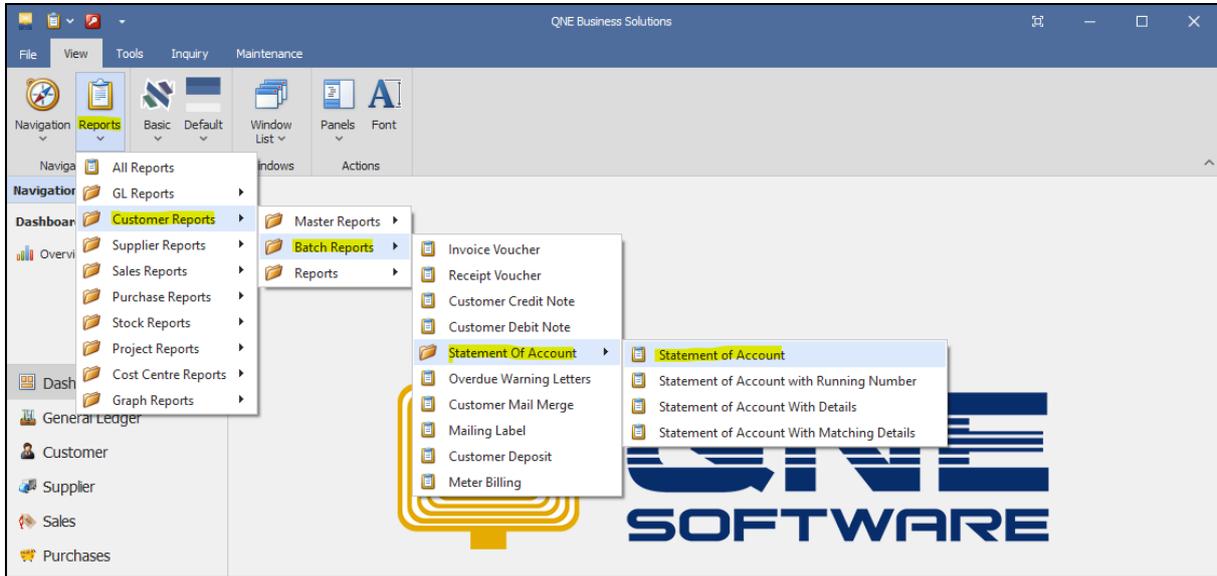
Homepage

Address	Contact	Misc
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:	Business Nature: SOFTWARE RESELLER Area: Term: 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



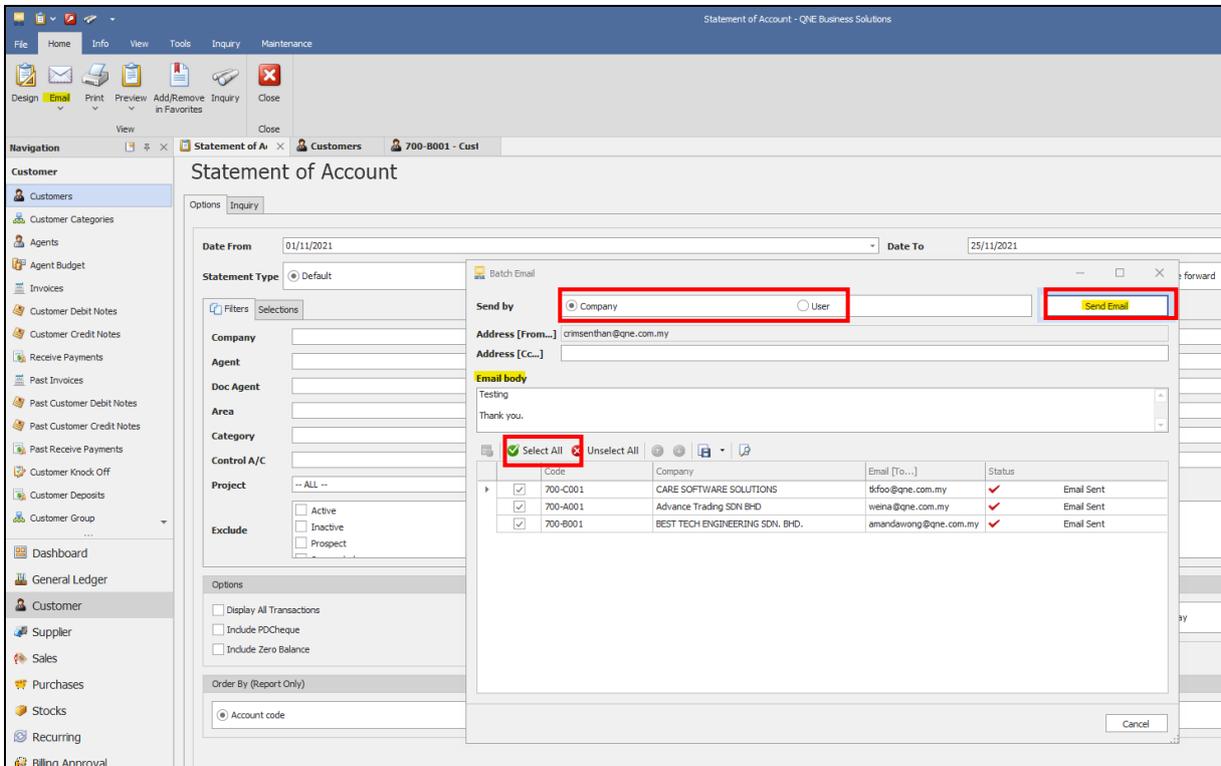
3. Go to View > Reports > Customer Reports > Batch Reports > **Statement of Account**



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

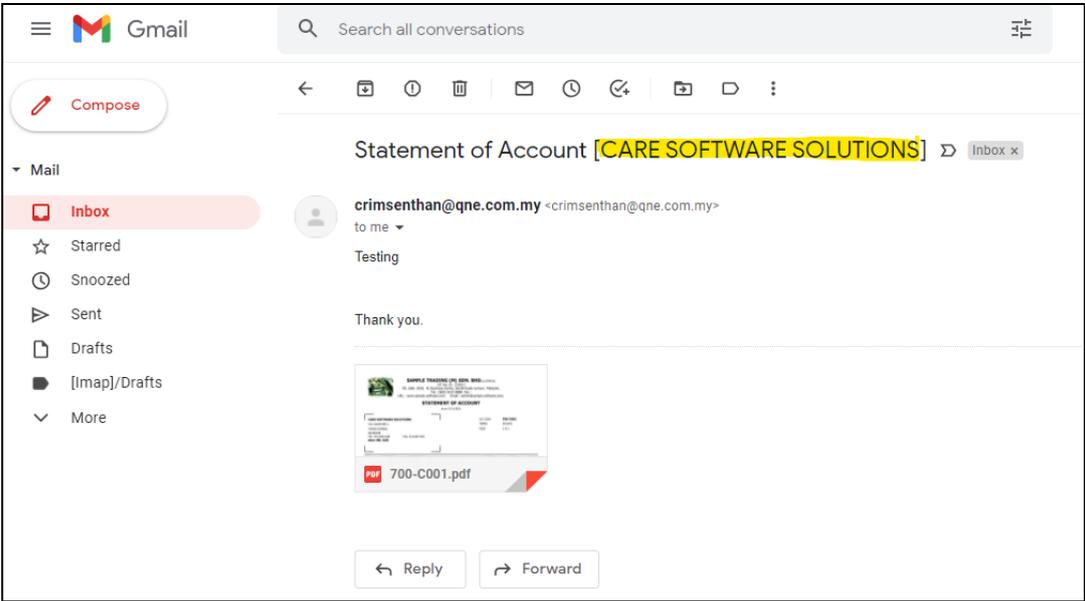
Select Sent by Company or User. Amend Email Body if you want

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



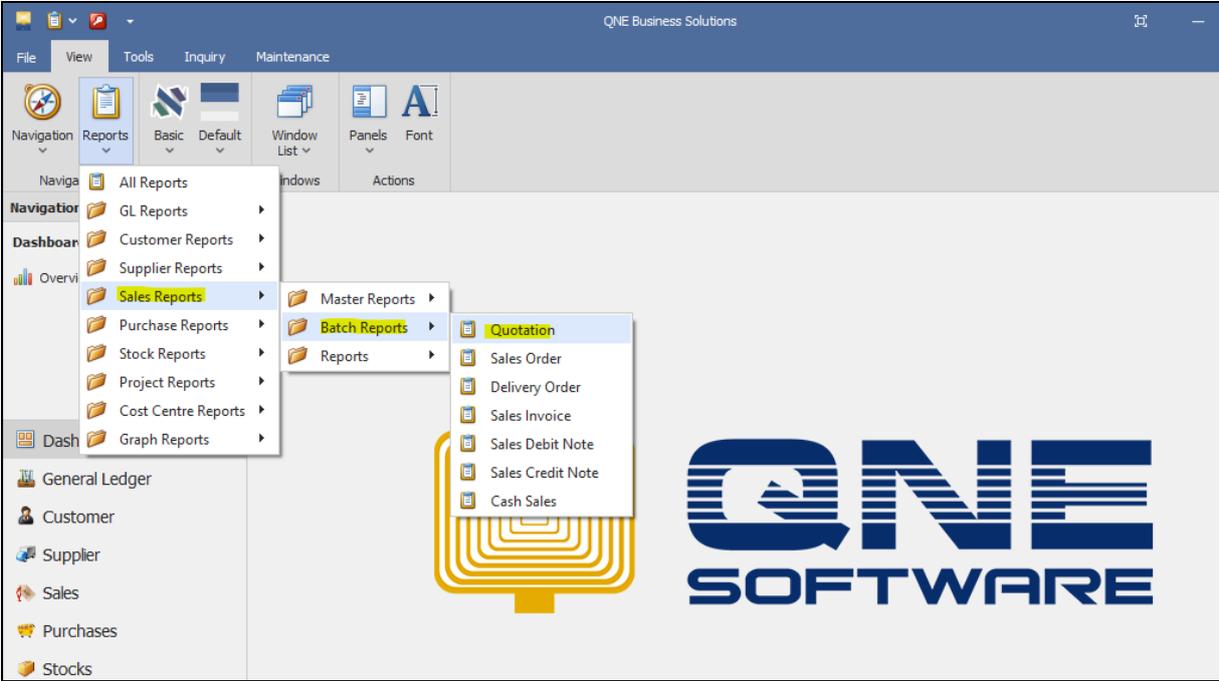
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5. Customer will receive the email as below together with Statement of Account



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