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Easy Mail Plug-In

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1.0 Introduction

The AutoCount Easy Mail Plugin is a feature that allows users to send emails directly from any AutoCount Accounting Preview screen. It includes tools such as EasyEmail, EasyStatement, and Advanced BatchMail, which make it easier to send and receive emails and send statements. The plugin is designed to enhance the functionality of the AutoCount Accounting software, offering advanced email capabilities for specific modules within AutoCount Accounting, such as the AR, AP, and Sales modules. Additionally, the Easy Mail Plugin can merge invoices and payment statements into a single PDF file and send them to customers, making it a convenient tool for businesses that need to send emails and bills quickly.



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2.0 Installing the Plug-In

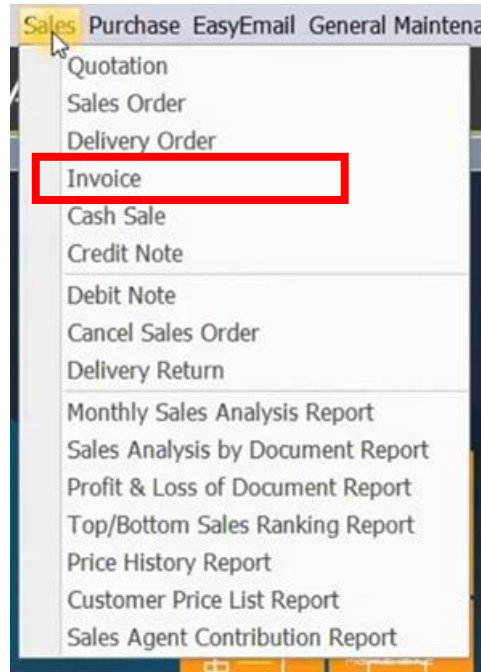
1. Go to **Tools > Plug-In Manager**
2. Click on the **“Install”** button.
3. Browse for the related **.app file** (*EasyEmail plugin*)
4. A new window will prompt with some basic information of this plug-in.
5. Click on the **“Install”** button again to proceed.
6. A confirmation message will be prompted after that.
7. Click **“Yes”** to confirm the installation.
8. A success message will appear after the plug-in is installed correctly.



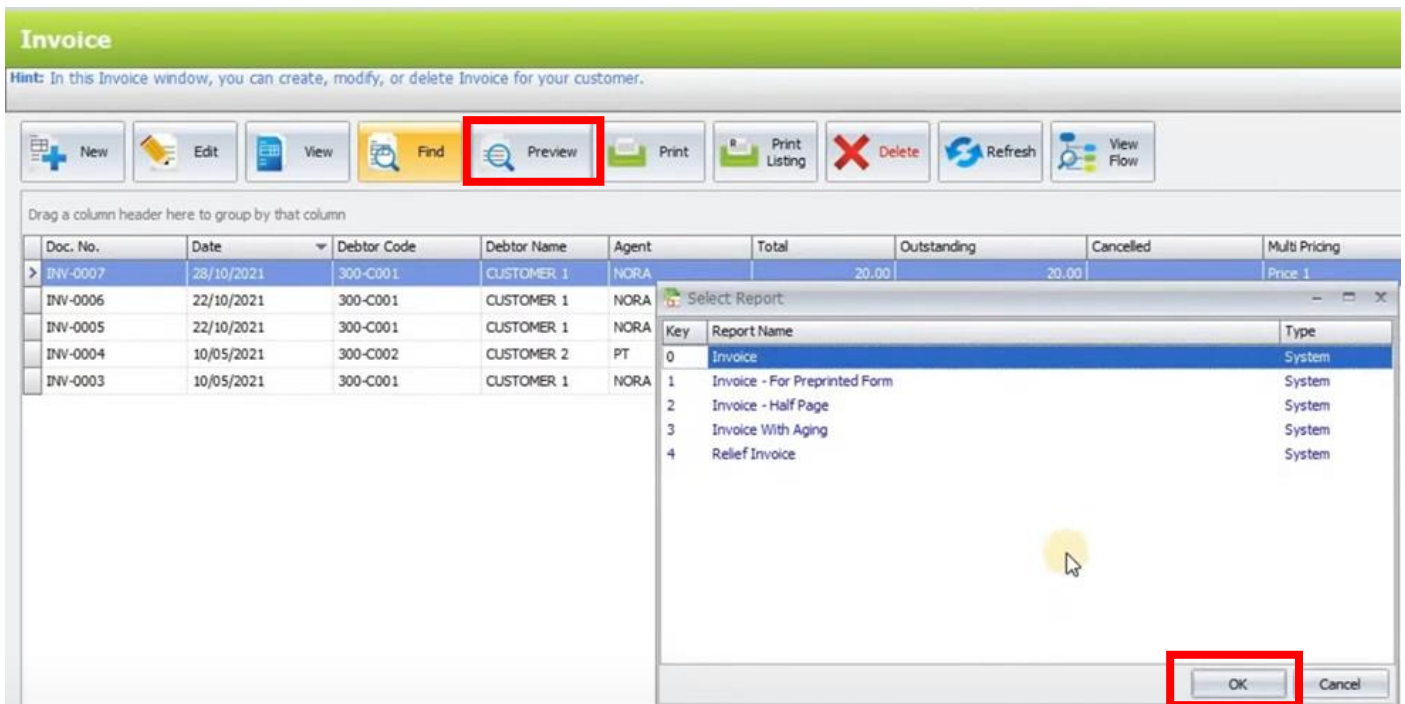
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3.0 Email Template

1. Go to **"Sales > Invoice."**



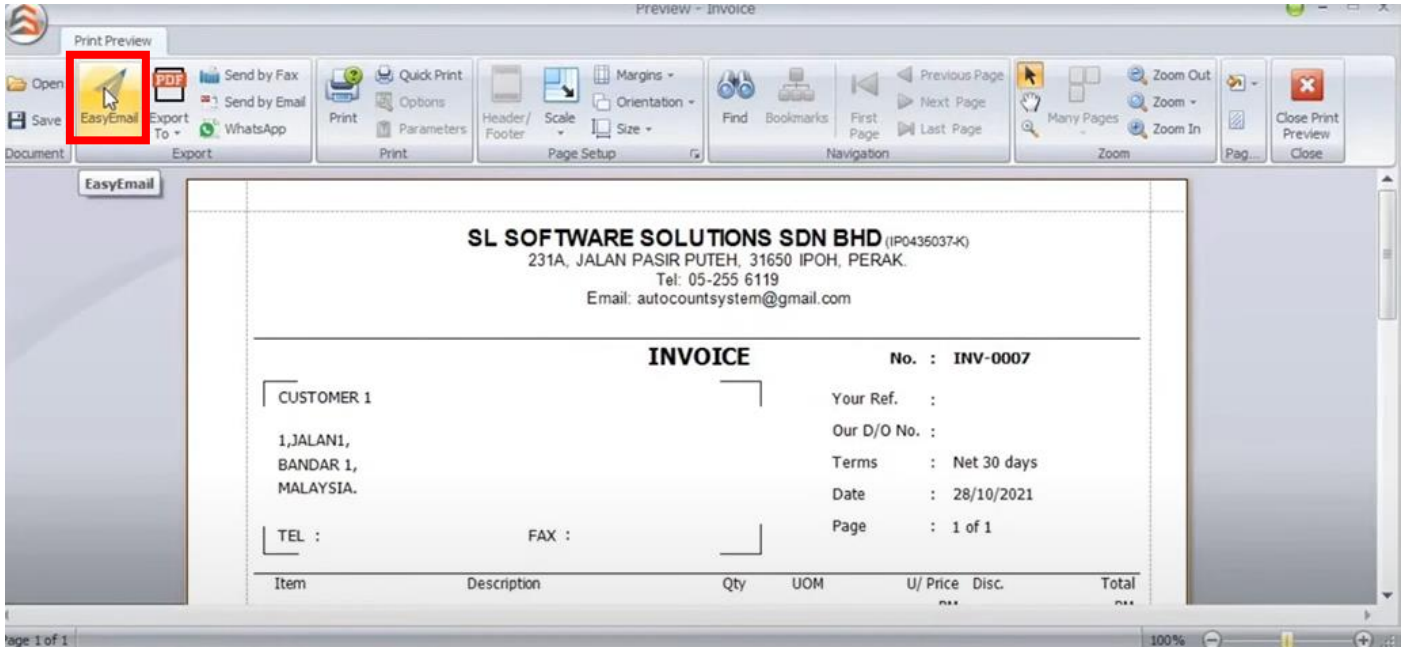
2. Click on **"Preview"** to view the report.



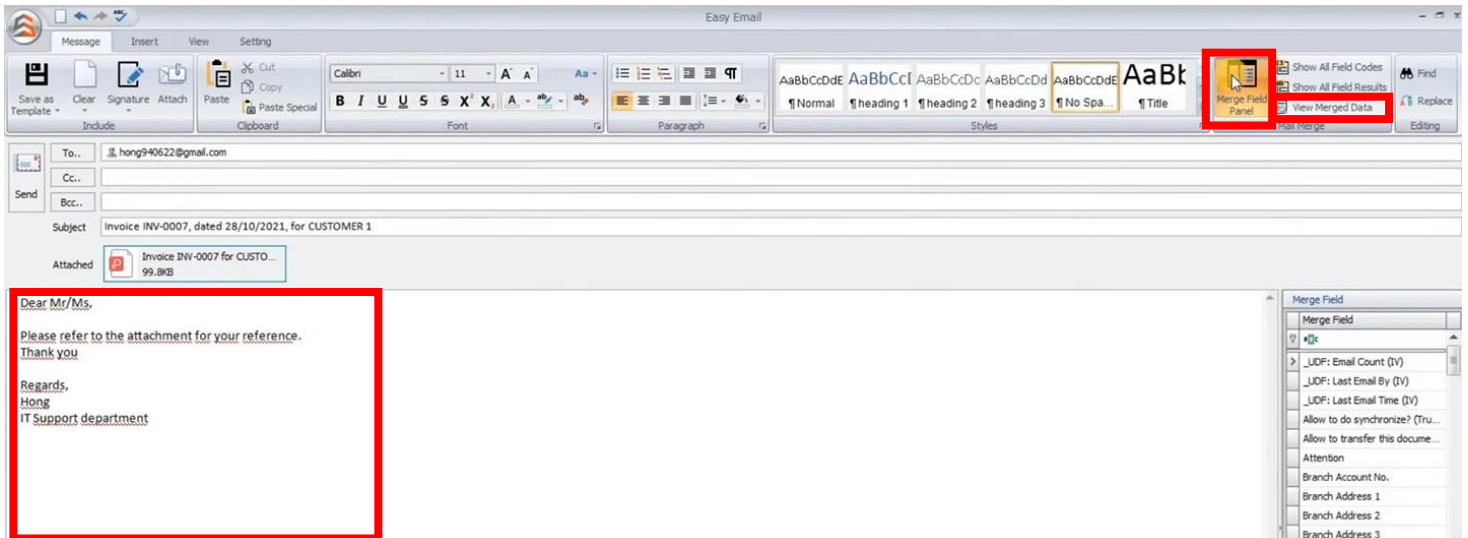


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3. Click on "Easy Email."



- 4. Enter your message.
- 5. For the subject, click on "Merge Field Panel" to set the format.
- 6. Once formatting is complete, click on "View Merged Data" to verify the correctness of the format.





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7. Click on **"Save on Template."**
8. Enter the template code and description.
9. Click **"Save."**

The screenshot shows an email client interface. The 'Save as Template' button in the top-left toolbar is highlighted with a red box. Below the email header, a 'Saving Email Template...' dialog box is open. The dialog box contains the following information:

- Document Type: Invoice Document
- Report Type: Invoice Document Template for EasyEmail
- Template Code: INV1
- Description: INV1
- Is Default
- Buttons: Save, Cancel

10. Click under **"Clear"** options the arrow to select template.

The screenshot shows a close-up of the 'Clear' button in the email client toolbar, which is highlighted with a red box. A dropdown menu is open, showing the following options:

- INV
- INV1
- IV
- Invoice for Dealer

11. If changes are needed after saving, click under **"Save as Template"** options the arrow.
12. Click on **"Email Template Maintenance"**

The screenshot shows the email client interface. The 'Save as Template' button in the top-left toolbar is highlighted with a red box. A dropdown menu is open, showing the following options:

- Clear
- Signature
- Attach
- Paste
- Copy
- Paste Special
- Is Default
- Save
- Cancel
- Email Template Maintenance



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4.0 To Manage Templates.

1. Under **"Email Template Maintenance,"** you can see all templates.
2. For editing, click **"Edit,"** make the necessary changes, and save.
3. To set a default template, select the template and click **"Default."**

Email Template Maintenance

Categories: All Reports

- Stock
- A/R
- Sales
- Purchase
- G/L
- A/P
- General Maintenance
- Inquiry
- Tools
- Business Flow

Drag a column header here to group by that column

Template Code	Doc. Type	Report Type	Description	Is Default	Is Batch Mail	Created Time Stamp	Created User ID	Last Modified	Last Modified User ID
Debtor Statement1		Debtor Statement	Debtor Statement1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	19/10/2021 09:41	ADMIN	28/10/2021 15:20	ADMIN
INV	IV	Invoice Document	INV	<input type="checkbox"/>	<input type="checkbox"/>	20/10/2021 18:15	ADMIN	28/10/2021 12:33	ADMIN
INV 1	IV	Invoice Document	INV 1	<input type="checkbox"/>	<input type="checkbox"/>	28/10/2021 12:39	ADMIN	28/10/2021 12:39	ADMIN
INVOICE B	IV	Invoice Document	INV B	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20/10/2021 18:16	ADMIN	20/10/2021 18:16	ADMIN
INVOICE BATCH	IV	Invoice Document	INVOICE BATCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20/10/2021 15:03	ADMIN	20/10/2021 15:03	ADMIN
INVOICE C	IV	Invoice Document	INV C	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	22/10/2021 15:14	ADMIN	22/10/2021 15:14	ADMIN
IV	IV	Invoice Document	IV	<input type="checkbox"/>	<input type="checkbox"/>	01/10/2021 00:51	ADMIN	20/10/2021 17:52	ADMIN
IVD	IV	Invoice Document	Invoice for Dealer	<input type="checkbox"/>	<input type="checkbox"/>	01/10/2021 00:53	ADMIN	19/10/2021 09:46	ADMIN
OR	RP	Official Receipt	OFFICIAL RECEIPT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2021 01:12	ADMIN	19/10/2021 09:48	ADMIN
OR BATCH MAIL	RP	Official Receipt	OFFICIAL RECEIPT BATCH MAIL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2021 01:15	ADMIN	19/10/2021 09:48	ADMIN
OR BATCH MAIL 1	RP	Official Receipt	OFFICIAL RECEIPT BATCH MAIL 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	20/10/2021 18:20	ADMIN	20/10/2021 18:20	ADMIN
PO	PO	Purchase Order Document	PO	<input type="checkbox"/>	<input type="checkbox"/>	01/10/2021 01:16	ADMIN	19/10/2021 09:49	ADMIN
AQ AUTOCOUNT SUPPORT	QT	Quotation Document	AUTOCOUNT QUOTATION RENEWAL SERVICE CONTRACT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	01/10/2021 01:10	ADMIN	28/10/2021 15:24	ADMIN
QUOTATION	QT	Quotation Document	QUOTATION	<input checked="" type="checkbox"/>	<input type="checkbox"/>	01/10/2021 00:47	ADMIN	19/10/2021 09:50	ADMIN
QUOTATION2	QT	Quotation Document	QUOTATION2	<input type="checkbox"/>	<input type="checkbox"/>	01/10/2021 00:50	ADMIN	19/10/2021 09:51	ADMIN



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5.0 Advanced Batch Mail

1. Go to **"Sales > Invoice."**
2. Click on **"Print Listing"** and select **"Batch Print Invoice."**

Invoice

Hint: In this Invoice window, you can create, modify, or delete Invoice for your customer.

Buttons: New, Edit, View, Find, Preview, Print, **Print Listing**, Delete, Refresh, View Flow

Drag a column header here to group by that column

Doc. No.	Date	Debtor Code	Debtor Name	Agent	Total	Outstanding	Cancelled	Multi Pricing
> INV-0007	28/10/2021	300-C001	CUSTOMER 1	NORA	20.00	20.00		Price 1
INV-0006	22/10/2021	300-C001	CUSTOMER 1	NORA	20.00	20.00		Price 1
INV-0005	22/10/2021	300-C001	CUSTOMER 1	NORA	900.00	900.00		Price 1
INV-0004	10/05/2021	300-C002	CUSTOMER 2	PT				
INV-0003	10/05/2021	300-C001	CUSTOMER 1	NORA				

Select Listing Report Type

Batch Print Invoice / Print Invoice Listing

Print Invoice Detail Listing

Buttons: OK, Cancel



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3. Use **"Inquiry"** to refresh the information.
4. Upon clicking **"Batch Mail,"** the report will automatically pop up.

Print Invoice Listing - SL SOFTWARE SOLUTIONS SDN BHD [EASYEMAIL] - AutoCount Accounting (Ver: 2.0) (Rev: 183)

File G/L A/R A/P Inquiry Stock Sales Purchase EasyEmail General Maintenance Tools Window Help | Report

Print Invoice Listing

Report Type: Batch Print Invoice

Filter Options

Document Date: No filter

Document No: No filter

Debtor: No filter

Debtor Type: No filter

Sales Agent: No filter

Area: No filter

Sales Location: No filter

Cancelled Status: Show Uncancelled

Report Options

Group By: None

Sort By: Date

Show Criteria In Report

Advanced Filter...

Inquiry
Preview
Print
Batch Mail
Hide Options
Criteria
Close

Search Result Keep Search Result

Check All Uncheck All Uncheck All in Selection Clear all unchecked records from the grid

Drag a column header here to group by that column

	Doc. No.	Date	Debtor Code	Debtor ...	Agent	Total	Outstanding	Cancelled	Multi Pricing	Email Count	Last Email By	Last Email Time
<input checked="" type="checkbox"/>	INV-0003	10/05/2021	300-C001	CUSTOM...	NORA	40,778.00	38,952.10		Price 1	0		
<input checked="" type="checkbox"/>	INV-0004	10/05/2021	300-C002	CUSTOM...	PT	9,500.00	9,500.00		Price 1	0		
<input checked="" type="checkbox"/>	INV-0005	22/10/2021	300-C001	CUSTOM...	NORA	900.00	900.00		Price 1	0		
<input checked="" type="checkbox"/>	INV-0006	22/10/2021	300-C001	CUSTOM...	NORA	20.00	20.00		Price 1	0		
<input checked="" type="checkbox"/>	INV-0007	28/10/2021	300-C001	CUSTOM...	NORA	20.00	20.00		Price 1	0		

5. Click on **"Batch Mail"**.

Print Preview - Invoice

Open
Batch Mail
EasyEmail
Export To
Send by Fax
Send by Email
WhatsApp
Quick Print
Options
Parameters
Print
Header/Footer
Scale
Page Setup
Margins
Orientation
Size
Find
Bookmarks
First Page
Navigation
Previous Page
Next Page
Last Page
Many Pages
Zoom
Pag
Close Print Preview

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 231A, JALAN PASIR PUTEH, 31650 IPOH, PERAK.
 Tel: 05-255 6119
 Email: autcountsystem@gmail.com

INVOICE No. : INV-0003

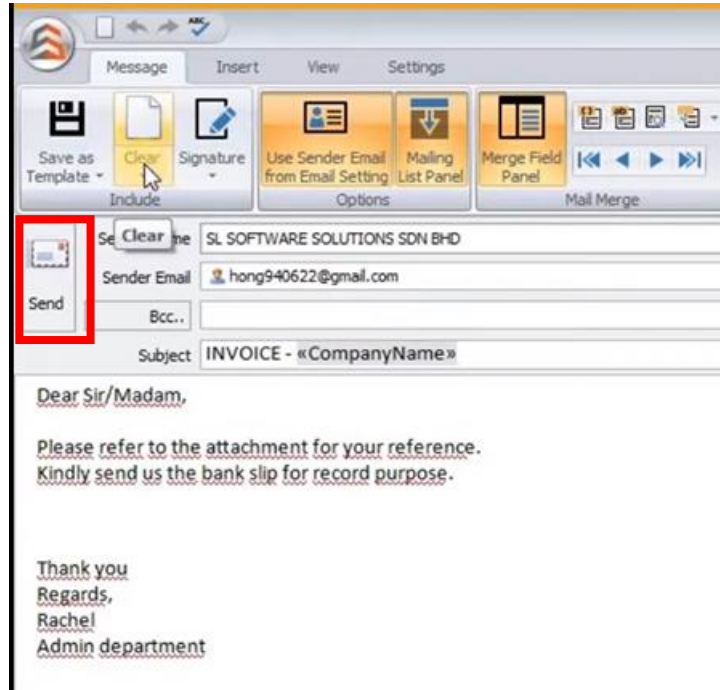
<p>CUSTOMER 1</p> <p>1, JALANI, BANDAR 1, MALAYSIA.</p> <p>TEL : FAX :</p>	<p>Your Ref. : :</p> <p>Our D/O No. : DO-000001</p> <p>Terms : Net 30 days</p> <p>Date : 10/05/2021</p> <p>Page : 1 of 1</p>
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Item	Description	Qty	UOM	U/ Price	Disc.	Total

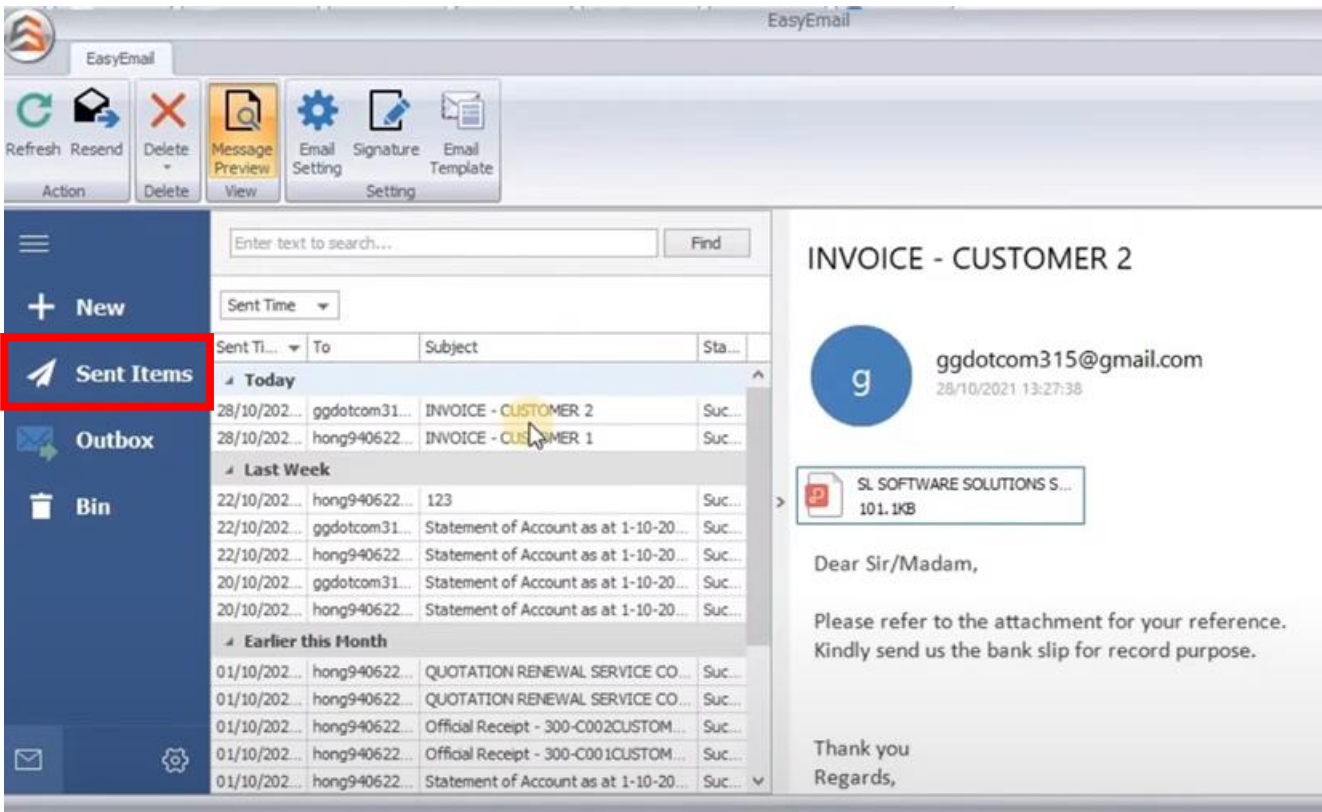


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6. then click "Send" will pop out EasyEmail.



7. Click "Sent Items" to select.

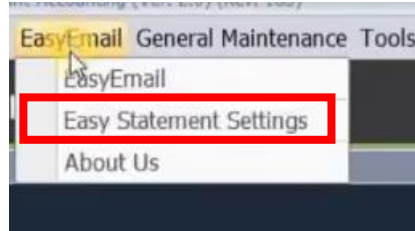




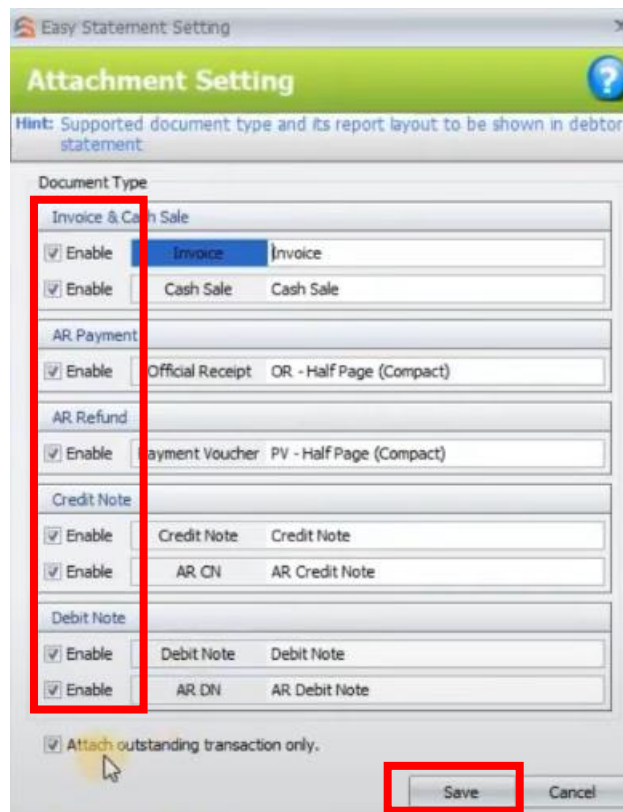
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6.0 Easy Statement

1. Go to **EasyEmail > Easy Statement Setting**.



2. Tick **"Enables"** to set the format.
3. Select format.
4. Click on **"Save."**



The screenshot shows the 'Easy Statement Setting' dialog box with the 'Attachment Setting' tab selected. A red box highlights the 'Document Type' section, which contains the following items:

Document Type	Enable	Format	Report Layout
Invoice & Cash Sale			
Invoice	<input checked="" type="checkbox"/>	Invoice	Invoice
Cash Sale	<input checked="" type="checkbox"/>	Cash Sale	Cash Sale
AR Payment			
Official Receipt	<input checked="" type="checkbox"/>	OR - Half Page (Compact)	
AR Refund			
Payment Voucher	<input checked="" type="checkbox"/>	PV - Half Page (Compact)	
Credit Note			
Credit Note	<input checked="" type="checkbox"/>	Credit Note	Credit Note
AR CN	<input checked="" type="checkbox"/>	AR CN	AR Credit Note
Debit Note			
Debit Note	<input checked="" type="checkbox"/>	Debit Note	Debit Note
AR DN	<input checked="" type="checkbox"/>	AR DN	AR Debit Note

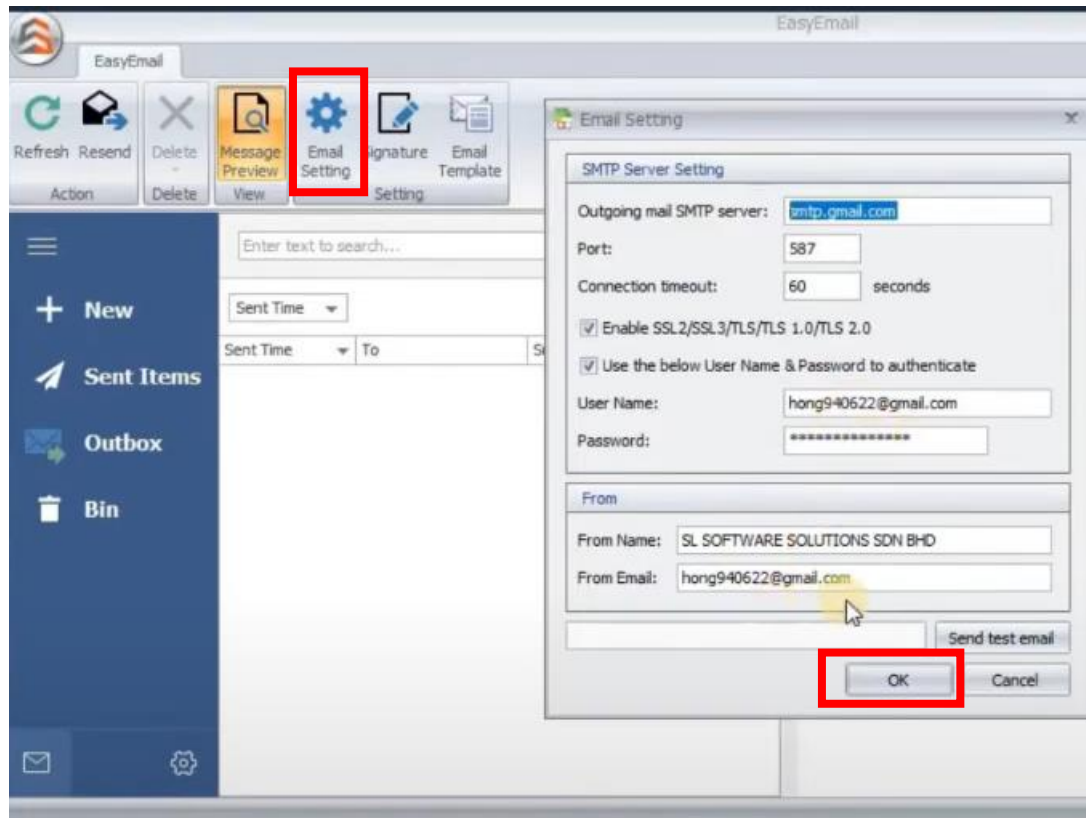
At the bottom, there is a checkbox for 'Attach outstanding transaction only.' and a 'Save' button highlighted with a red box.



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6.1 Easy Email Configuration

1. Go to **Easy Email > Email Setting**.
2. Fill in all the required information.
3. Click **"OK."**





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6.2 A/R Debtor Statement Report

1. Go to “A/R > Debtor Statement Report”.
2. Click on “Inquiry” and “Preview Easy Statement” to verify its correctness, then close.

Debtor Statement

Basic Options
Date Range: 01/01/2021 to 28/10/2021
Debtor: Filter by multi-select - 2 were selected

Other Options
Statement Type: Open Item Only
Normal/KnockOff: KnockOff Statement

Report Options
Sort By: Debtor Code
 Show Criteria In Report

More Options

Inquiry Preview Easy Statement Preview Print Batch Mail Hide Options Criteria Close

Search Result
Check All Uncheck All Uncheck All in Selection Clear all unchecked records from the grid

Drag a column header here to group by that column

To Be Up...	Debtor No.	Company Name	Debtor
<input checked="" type="checkbox"/>	300-C001	CUSTOMER 1	NORA
<input checked="" type="checkbox"/>	300-C002	CUSTOMER 2	PT

Please Wait
Verify Easy S

3. These steps should help you configure Easy Statement and Email settings, as well as verify A/R Debtor Statement Reports.