

1. This is the page when you will click on Bulk email. It will have two options viz, VAT and Bank Statement but I request you to let me know more modules for which you want to send bulk email. After that the screen will appear on click of VAT. You will search for the clients based on the search criteria and then send email to multiple clients by clicking on send email button.

DashboardClientsAccountantsBulk UploadBulk EmailConfigurationTerms & Conditions

Send Email

VATBank Statement

SearchReset

VAT Type:Account DueReturn DueVAT Due

Days:Next 30 DaysNext 30 to 60 Days60 Days above

Quarters:Next 30 DaysQ1Q2Q3Q4

Add Template

<input type="checkbox"/>	Company Name	Client Name	Company Reg No.	Year End Date	Action
<input checked="" type="checkbox"/>	ABC Company	Micheal	98715454	22-06-2017	Not Filled
<input type="checkbox"/>	XYZ Company	Jonson	78945621	30-06-2017	Filled

Send Email

2. This is the screen which will appear after clicking on Send Email. Here you select the existing template or can create new one. If you have selected template created by us then some of the content will come up dynamically and some you will enter.

Email Template

Select Email Template

Subject

Description

Send

Save & Send

Cancel

3 If you clicked on bank statement tab and want to send email asking clients to submit bank statement from this date to this date, then below screen will appear.

Dashboard

Clients

Accountants

Bulk Upload

Bulk Email

Configuration

Terms & Conditions

Send Email

VAT

Bank Statement

Search

Reset

Start Date:

20/06/2015

End Date

30/06/2015

Year End Date

30/06/2015

Add Template

<input type="checkbox"/>	Company Name	Client Name	Company Reg No.	Year End Date	Action
<input checked="" type="checkbox"/>	ABC Company	Micheal	98715454	22-06-2017	Not Filled
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