

**WhatsApp Smart Pay+
Plugin**

Private & Confidential

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Submitted by:



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AutoCount Accounting Special Plugin- WhatsApp Smart Pay+ Plugin

1.0 Prerequisites

- Ensure you have a valid account for :
 - ✓ **Onsend** [Registration Guide](#)
 - ✓ **Billplz**
 - ✓ Live account: [Registration Guide](#)
 - ✓ Testing account: [Registration Guide](#) (only if want to do testing)

- After installing the plugin, grant user access at **General Maintenance > Access Right Maintenance**

- For the first time, user must :
 - ✓ **AC_Whatsapp > Settings** : Must click Save for the first time. [Guide](#).
 - ✓ **AC_Whatsapp > Billplz Payment Methods**: Map the Billplz payment methods to the desired payment methods in AutoCount Accounting. [Guide](#).

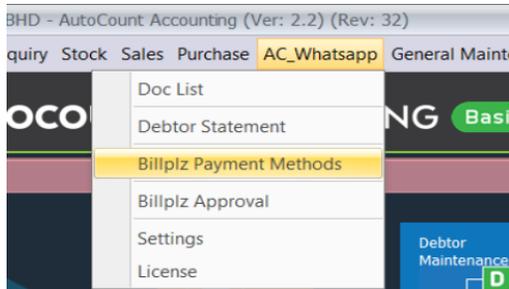
- Ensure you have the following Report Style Name

Doctype	Report Style Name
Quotation	Quotation WebAPI
Invoice	Invoice WebAPI
Sales Order	Sales Order WebAPI
Debtor Statement	Debtor Statement WebAPI

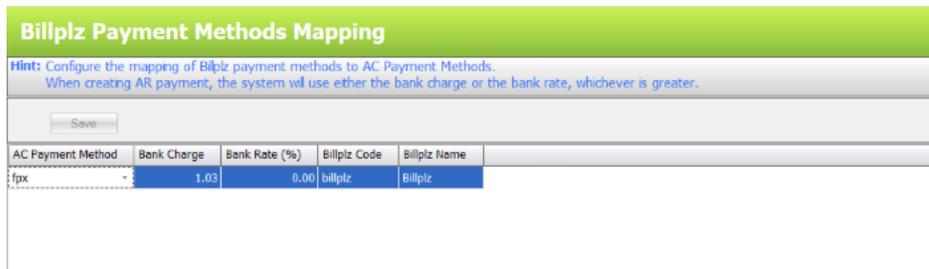
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2.0 Steps to use

- Map Billplz payment methods in AC.
 - Go to **AC_Whatsapp > Billplz Payment Methods**.



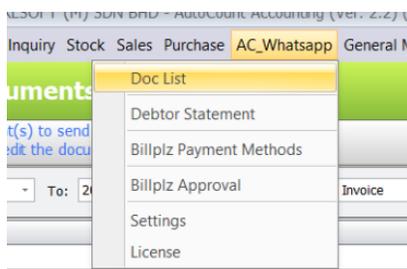
- This page will fetch available payment methods from your Billplz account.



- Enter AC Payment Method, Bank Charge and Bank Rate for each row.
- Click "Save" button.

- Send WhatsApp message with payment link for IV/SO/QT

- Go to **AC_Whatsapp > Doc List**.



- Select filter options and press "Query" button to fetch data.



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3. Select rows and click "Send WhatsApp" button.

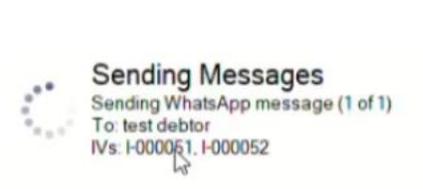
List of Documents

Hint: Select document(s) to send WhatsApp with payment link.
Double click to edit the document

From: 01-Nov-25 To: 20-Nov-25 Document Type: Invoice Query Consolidate messages for some customer

Document No	Date	Customer Code	Customer Name	Phone	Mobile	Status
I-000074	20-11-2025	300-T001	test debtor			Completed
I-000073	17-11-2025	300-T001	test debtor			Completed
I-000070	14-11-2025	300-0001	test vehicle			
I-000071	14-11-2025	300-0001	test vehicle			

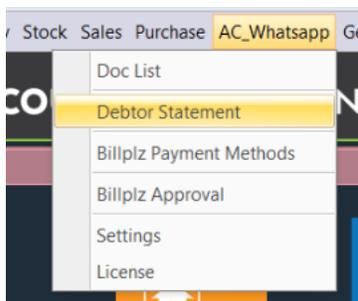
4. Wait for the messaging process to complete.



5. Debtor will receive the message with payment link and file.

- Send WhatsApp message with payment link for Debtor Statement

1. Go to **AC_Whatsapp > Debtor Statement**.



2. Select filter options and press "Inquiry" button to fetch data.

Debtor Statement With WhatsApp function

Hint: Select debtor invoices to send WhatsApp with payment link and debtor statement.
Only Outstanding balance from Invoices without 'Completed' status will be sent for payment link.

Basic Option

Date: 11-2025 to 20-11-2025
Debtor: No filter

Other Option

Statement Type: Open Item Only
Normal/knockOff: Normal Statement

Report Option

Sort By: Debtor Code Combine debtor statement file with outstanding Invoices?

Only Invoices (24) are displayed in this table

AutoCount Accounting Special Plugin- WhatsApp Smart Pay+ Plugin

3. Select debtors and invoices, and click “Send WhatsApp” button.

Debtor Statement With WhatsApp function

Basic Option
Date: 12-11-2025 To: 20-11-2025
Debtor: No Filter

Other Option
Statement Type: Open Item Only
Normal/KeenOff: Normal Statement

Report Option
Sort By: Debtor Code
 Combine debtor statement file with outstanding Invoices?

Buttons: Inquiry, Preview, **Send WhatsApp**, Close

Only Invoices (30) are displayed in this table

Debtor No.	Company Name	Debtor Agent	Debtor Type	Phone1	Mobile	Currency Code	Balance
360-0001	test vehicle					USD	240

DebtorCode	DocDate	DocNo	Description	ChequeNo	Debit	Credit	Balance	Doc Type	Status	Billplz ID	Outstanding
360-0001	11-Nov-25	1-000044	INV0102		120.00		120.00	IN	Completed	636a005045ad1188	0.00
360-0001	12-Nov-25	1-000046	INV0102		120.00		240.00	IN	Completed	239f4d237acc0307	0.00
360-0001	12-Nov-25	1-000048	INV0102		120.00		360.00	IN	Completed	239f4d237acc0307	0.00
360-0001	12-Nov-25	1-000050	INV0102		120.00		480.00	IN	Completed	63be12e99f4e697	0.00
360-0001	12-Nov-25	1-000058	INV0102		120.00		600.00	IN	Completed	239f4d237acc0307	0.00
360-0001	14-Nov-25	1-000070	INV0102		120.00		720.00	IN		af8b2c96139fac	120.00
360-0001	14-Nov-25	1-000071	INV0102		120.00		840.00	IN		af8b2c96139fac	120.00

4. Wait for the messaging process to complete.
5. Debtor will receive the message with payment link and debtor statement file.

- Approve payments

1. Go to **AC_Whatsapp > Billplz Approval**.

Sales Purchase **AC_Whatsapp**

- Doc List
- Debtor Statement
- Billplz Payment Methods
- Billplz Approval**
- Settings
- License

2. Select filter options and press “Search” button to fetch data.

Billplz Approval

Hint: Approve paid billplz to invoke automated processes

Date From: 01-Nov-25 Date To: 20-Nov-25 Document Type: Invoice

Buttons: Search, Approve Selected

Drag a column header here to group by that column

Action	Billplz ID	Invoice No	Amount (RM)

AutoCount Accounting Special Plugin- WhatsApp Smart Pay+ Plugin

3. Select payments and press “Approve Selected” button to approve.

Billplz Approval

Hint: Approve paid Billplz to invoke automated processes

Date From: 01-Nov-25 Date To: 12-Nov-25 Document Type: Invoice Search Approve Selected

Drag a column header here to group by that column

	Billplz ID	Total Amount (RM)	Customer Name	Payment Date	Status	Doc Number
	6211941475196266	66.00	TEST BIRTHOK	2025-11-12 14:21:18 +0800	completed	1-966953, 1-000032

4. Wait for the processes to finish.

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3.0 Settings

Menu: AC_Whatsapp > Settings

AC_WhatsApp Settings ⓘ

Hint: Configure WhatsApp API settings, notifications, and global preferences.

Company Settings

X-API-Key:

E-invoice auto approve?

Onsend API (Whatsapp)

Onsend Token:

Template:

The accepted placeholders for template are:
{CompanyName}, {BillplzLink}, {DebtorName}, {PaymentLinkExpiry}

Billplz Settings (Payment Gateway)

Base URL:

Collection ID:

API Key:

Callback URL:

Save Close

- **X-API-Key:** The API key used for connecting to Presoft's server
- **E-invoice auto approve:** If enabled, once payment is approved, IV will be saved as approved and OR will knock off. If disabled, IV will be saved as draft and OR created without knock off.
- **Onsend Token:** Get the token after device registration at Onsend. Refer to the [steps](#).
- **Template:** Message template for sending WhatsApp messages.
- The supported placeholders are: {CompanyName}, {BillplzLink}, {DebtorName}, {PaymentLinkExpiry}
- {BillplzLink} must be present in the template for payment link.
- **Base URL:** The base URL of Billplz API. Refer to [Billplz Docs](#).
- **Collection ID:** The collection created at Billplz dashboard. Refer to the [Guide](#) to get.
- **API Key:** The API Key for Billplz. Refer to the [Guide](#) to get.
- **Callback URL:** The Presoft's server URL that receive Billplz updates after payment.
- **Save button:** Save the current settings
- **Close button:** Close the current page

4.0 Features Guide

4.1 Payment Methods Mapping for Billplz-AC

Menu: **AC_Whatsapp > Billplz Payment Methods**

AC Payment Method	Bank Charge	Bank Rate (%)	Billplz Code	Billplz Name
fpa	1.02	0.00%	billplz	billplz

AC Payment Method: The payment method used for creating AR Payment in AC.

This payment method must be already created at General Maintenance > Payment Method Maintenance. This field is empty if you never configure the payment method.

Bank Charge: The transaction fee for the payment method in RM.

Bank Rate (%): The transaction fee for the payment method in percentage. Acceptable number is between 0 to 100.

Billplz Code: The payment method code from Billplz. This field is automatically fetched from your Billplz account and not editable.

Billplz Name: The payment method name from Billplz. This field is automatically fetched from your Billplz account and not editable.

Save button: Save the fields

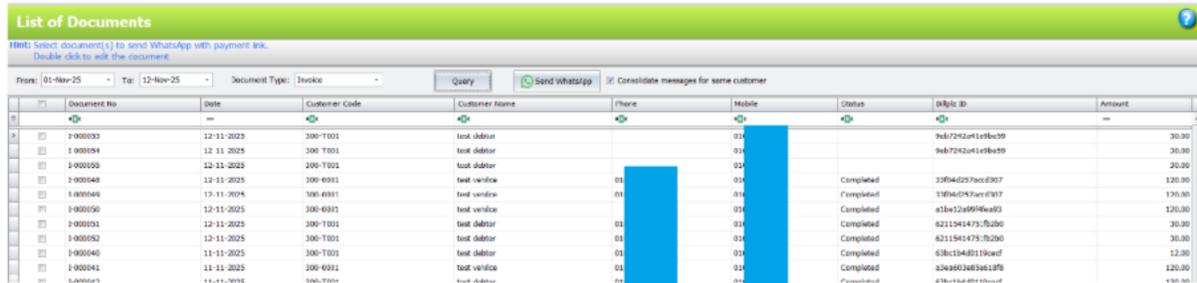
Note:

- This page automatically fetch the payment methods from your Billplz account. To apply for more payment methods in Billplz, refer to the [Guide](#).
- The system will use the AC Payment Method when creating AR Payment, and choose the largest value from Bank Charge and Bank Rate to set as the bank charge.

AutoCount Accounting Special Plugin- WhatsApp Smart Pay+ Plugin

4.2 Send WhatsApp for Document (IV / SO / QT)

Menu: AC_Whatsapp > Doc List



From & To: The date range to fetch docs.

Document Type: The document type to fetch.

Query button: Fetch data based on the document type and date range.

Send WhatsApp button: Send WhatsApp message with payment link and file to Mobile for the selected rows. The Billplz ID field will be automatically filled after sending messages.

Consolidate messages for same customer checkbox: If checked, the selected rows of same debtor will be sent in a single payment link.

Note:

- To edit Mobile, please find the debtor at A/R > Debtor Maintenance
- Please ensure you have the following Report Name:

Doctype	Report Name
Quotation	Quotation WebAPI
Invoice	Invoice WebAPI
Sales Order	Sales Order WebAPI

AutoCount Accounting Special Plugin- WhatsApp Smart Pay+ Plugin

4.3 Send WhatsApp for Debtor Statement

Menu: AC_Whatsapp > Debtor Statement

Debtor Statement With WhatsApp function

Hint: Select debtor invoices to send WhatsApp with payment link and debtor statement.
Only Invoices without "Completed" status will be sent for payment link.

Basic Option
Date: 12-11-2025 to 14-11-2025
Debtor: No filter

Other Option
Statement Type: Open Item Only
Normal/TrackOFF: Normal Statement

Report Option
Sort By: Debtor Code
 Combine debtor statement file with outstanding Invoices?

Buttons: Inquiry, Preview, Send WhatsApp, Close

Table:

Debtor No.	Company Name	Debtor Agent	Debtor Type	Phone1	Mobile	Currency Code	Balance
300-0001	test debtor					MYR	240.00

Detail	DebtorCode	DocDate	DocNo	Description	ChequeNo	Debit	Credit	Balance	Doc Type	Status	Billplz ID	Outstanding
<input type="checkbox"/>	300-0001	11-11-2025	F-000041	INV/ICE		120.00		120.00	IN	Completed	1396422574ec2007	0.00
<input type="checkbox"/>	300-0001	12-11-2025	F-000044	INV/ICE		120.00		240.00	IN	Completed	1396422574ec2007	0.00
<input type="checkbox"/>	300-0001	12-11-2025	F-000044	INV/ICE		120.00		360.00	IN	Completed	1396422574ec2007	0.00
<input type="checkbox"/>	300-0001	12-11-2025	F-000050	INV/ICE		120.00		480.00	IN	Completed	413e12a39f9fae93	0.00
<input type="checkbox"/>	300-0001	12-11-2025	F-000058	INV/ICE		120.00		600.00	IN	Completed	239f20c9b46a35	0.00
<input type="checkbox"/>	300-0001	14-11-2025	F-000070	INV/ICE		120.00		720.00	IN		1396422574ec2007	120.00
<input type="checkbox"/>	300-0001	14-11-2025	F-000071	INV/ICE		120.00		840.00	IN		1396422574ec2007	240.00

Inquiry button: Fetch debtor statement based on the filter options. Only Invoices will be displayed.

Preview button: Preview debtor statement

Send WhatsApp button: Send WhatsApp message with payment link and statement file. Only the ticked invoices without "Completed" status will be used for payment link.

Combine debtor statement with outstanding invoice: If checked, the outstanding invoices will be appended after debtor statement in a single PDF for sending WhatsApp.

Close Button: Close the page

Note:

- After ticking a debtor, all associated invoices will be ticked automatically.
- User can untick the invoices but only outstanding amount from invoices without "Completed" status will be used for payment amount calculation.
- The debtor's Mobile will be used for sending WhatsApp. To edit Mobile, please find the debtor at A/R > Debtor Maintenance
- Once payment is made, please proceed to AC_Whatsapp > Billplz Approval and select "Invoice" for Document Type, to approve the payment.
- Please ensure you have the following Report Name:

Doctype	Report Name
Debtor Statement	Debtor Statement WebAPI

AutoCount Accounting Special Plugin- WhatsApp Smart Pay+ Plugin

4.4 Approve Payment from Billplz

Menu: AC_Whatsapp > Billplz Approval

Date From & To: The date range to fetch

Document Type: The document type to fetch

Search button: Fetch data based on the document type and date range

Approve Selected: Approve the selected payments and invoke the automation processes.

Below are the summary of the processes after approval for each doctype:

Invoice	<ul style="list-style-type: none"> Set the UDF_Status to "Completed". If auto knock off enabled, the invoice will be approved. Create AR Payment. Knock off if enabled auto knock off.
Sales Order	<ul style="list-style-type: none"> Set the UDF_Status to "Completed" Transfer to Invoice with "Completed" status and Billplz ID. One SO to one IV. If auto knock off enabled, the invoice will be approved, otherwise keep as draft. Create AR Payment. Knock off if enabled auto knock off.
Quotation	<ul style="list-style-type: none"> Set the UDF_Status to "Completed". Transfer to Invoice with "Completed" status and Billplz ID. One QT to one IV. If auto knock off enabled, the invoice will be approved, otherwise keep as draft. Create AR Payment. Knock off if enabled auto knock off.