To begin transmitting Accounts Receivable statements from your Eagle system you will need to confirm a few settings and processes.

In this course we will review how to determine that the File Transfer Manager is up and running [pause] and then we will take a look at the required and optional email settings found in Customer Maintenance.

When you e-mail documents from your Eagle system, you are actually transferring a file to an Epicor host server that will e-mail directly to your customer on your behalf.

For security reasons, this keeps your Eagle server safely behind your firewall or sonicwall and prevents any unnecessary exposure of your system.

From Eagle Browser select ‘Secure Access’.

At the prompt, type ‘OSPREY’ in capital letters in the ‘Login ID’ field.

Tab to the ‘Password’ field and type ’AVATAR’.

Click ‘OK’ or press Enter,

Log in with your Eagle Name and Password to open the Osprey Main Menu.

From the ‘Selection:’ prompt, type the letters ‘FTMGR’ and then press the enter key.

From the ‘Select Transfer Manager Option’ prompt we will select “-Enable” by simply typing the letter ‘E’.

The cursor moves to the bottom of the screen where you are prompted to take an ‘Action’.

Type the letter ‘E’ again to ‘-Execute’ and press Enter.

The system will now enable the File Transfer Manager by stopping it then automatically starting it.

When it is done, you will be prompted to press the Enter key to continue and return to the main menu.

To confirm that the File Transfer Manager is truly enabled type the letters ‘SSM’ at the ‘Selection:’ prompt.

The ‘Start/Stop System Managers’ menu appears.

Use the Down Arrow key to highlight the ‘File Transfer Manager option.

Check to be sure it displays the word ‘Started’ in the Status column.

If you see the word ‘Stopped’ here, press the F3 or ‘Run’ key to start it again.

When you are done, press the ‘Escape’ key to return to the Osprey Menu.

With the File Transfer Manager enabled, the final set-up step is to test the system’s e-mailing capabilities.

From the Osprey Menu type ‘TESTMAIL’ and then press the Enter key.

Enter a valid ‘To Email Address’.

You can enter your own address for testing and then press ‘Enter’.

Enter a ‘From Email Address’.

This is the sending e-mail address.

Since this is a test, the e-mail address does not have to be real, however the domain address, (everything after the @ sign), does need to be valid.

Press the enter key and the cursor moves to the ‘Action’ field. Type the letter ‘E’ to Execute and then press ‘Enter’.

The system prompts you to check your inbox for the test e-mail.

Press the Enter key again to return to the Osprey Menu.

Type ‘Exit’ to close Secure Access.

To enable your customers to receive e-mail statements some set-up needs to be done on both the Misc. [pause] and the Names or Contacts tabs of Customer Maintenance.

On the Miscellaneous tab there are two primary flags to review.

The ‘Statement/Format’ drop down indicates if and how your customers receive their statement via email.

Set the option to ‘N’ if you do not want to email them a statement.

Set this to ‘Y’ if you wish to send it without dunning messages. These are the past due notices that can print at the bottom of statements.

Choose Option ‘X’ to transmit the email with Dunning Messages.

E-mailed statements can be sent out in one of two formats: as an embedded HTML file or as a separate, attached HTML file.

With embedded HTML, you can see the information in the body of the email without having to open the attachment.

The ‘Job’s Email Address’ option is only relevant if this customer account has Jobs.

You can select whether the system should send e-mailed copies of invoices, credits and statements to a job-specific email address [pause] or if they should be emailed to the main account’s e-mail address.

Starting on Eagle Release 24.1, e-mail addresses are maintained on the ‘Names’ tab.

If you have enabled N-Series, then this tab has been renamed to the ‘Contacts’ tab.

For each customer, you can enter a contact who will receive e-mailed information.

When entering or editing the contact information, towards the bottom of the screen you can choose whether this contact will receive e-mailed statements and whether the information will be sent to them [pause], copied to them [pause] or blind copied to them.

For Eagle users on a version below Release 24.1, e-mail addresses for eStatements are maintained on the 'Notes' tab of Customer Maintenance.

From the Notes tab, press the 'Type' dropdown and select 'Note Type 10'.

Enter the customer's e-mail address in the Message area.

To enter multiple e-mail addresses, hold the CTRL key down and press enter. This creates a new line in the Message box. Enter the next e-mail address.

Only one e-mail address can be entered per line.

The out-going message that accompanies eStatements that are sent as HTML attachments can be customized.

Refer to the On-Line Help document titled 'Customizing Your e-Statement Message'.

This document is also located in the course materials section of this class.

iNet eStatement Set-Up and Configuration is easy to complete and once set up, you are ready to begin saving money on postage and payroll.

Your customers, your staff and your bottom line will appreciate this time saving method of processing your monthly Accounts Receivable Statements.

Be sure to watch the course titled 'Using iNet eStatements' to complete this Training on Demand agenda.