

e-Statements Setup and Configuration

You can get A/R statements to your customers faster and with a lot less cost by emailing them. In this course, we will introduce you to setting up e-Statements and configuring email addresses.

Choose a topic to learn more.

Objectives

- Setting Up e-Statements
- Configuring Email Addresses

Setting Up e-Statements

e-Statements can be configured only if you have e-Statements and iNet Connect enabled. From the Home page, enter "OPT" in the Launch bar. Enter 5780 in the Search field. The ID displays if the iNet e-Statements is enabled or disabled.

In the Options window, if you do not see the Subsystem field, tap change lookup. From the Subsystem drop-down field, scroll down to select INET. Make sure All Options is selected and tap Display.

Scroll down to find the option From email address for email purchase orders. Enter the address that you use to email statements to your customers in the Current Value column. If you are an iNet user and looking to include your site with the statement, find the option iNet Server and Site Name for Store. Enter your server's name followed by a comma and then your site name in the Current Value column. For example, if your store's iNet site is <http://op1.myinet.com/mysite>. Your server name is op1. The site name is mysite. Tap Change to save the changes.

Using the GL Transaction Viewer

From the Subsystem dropdown, choose A/R and E4W – Eagle for Windows from the Options drop-down. Tap Display to view the available options.

Locate iNet default value for Windows MCR email statements format. Tap the Current Value column and select the Down Arrow. Do you want to email the statements as an HTML attachment or as an embedded HTML? Tap Ok.

Tap ID and enter 8980 in the Option ID field. Tap Ok. Determine what email address to use when emailing to a job account. Tap Job's email address and select the Down Arrow.

J uses the job's email address.

M uses the main account's email address.

B includes both the main and the job's email addresses.

E uses the job's email address but if there are none found, it uses the main account's email address.

Tap Ok and tap Change. Click the right arrow icon to view the course recap.

Recap

Send your customers e-statements as an HTML attachment or embed them in the email. In this course, we showed how to set up e-Statements and configure the related email addresses.

Commented [KS1]: Lets add the exact ID numbers they need to check.

Commented [KS2]: There is no PDF option anymore?

Commented [AM3R2]: The current help says "Note that E-Statements does not include collated invoices in the email, and only an HTML statement is attached."

Commented [AM4R2]:

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