

# 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.

## Configuring Email Addresses

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.

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