Now that you have had a chance to review the pre-requisite training video, ‘eInvoices Overview’ you have seen how this product can benefit your business.

In today’s module, we’ll take a much more detailed look at each step in the configuration and set up process of your Eagle system.

We will verify that the File Transfer Manager is up and running and then take a look at the available email settings found in Customer Maintenance.

The first thing we will set up is the File Transfer Manager.

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 allow your customers to receive e-mail invoices there is some set-up required on both the ‘Miscellaneous’ and ‘Names’ or ‘Contacts’ tabs of Customer Maintenance.

On the ‘Misc’ tab the Email Information settings appear here.

The ‘Invoice/Credit’ drop down offers choices for the PDF invoice, PDF receipt and Text Detail options.

The ‘Text Detail’ types, (choices B, T or S), list out full invoice detail in the body of the e-mail that your customer receives.

Best Practice is to send a PDF of the customer’s invoice or receipt using option P or R.

The ‘Orders/Sp Ord/Estimate’ option allows you to choose whether the system will prompt your clerks to e-mail an order, special order or estimate for this customer upon pressing the total button at POS.

With a ‘Y’ value here, the system will default the answer to ‘Yes’ so the clerk can simply press the ‘Enter’ key to send.

With a value of ‘N’ here, the clerk will not be prompted to e-mail the document.

However, Cashiers can still forward an invoice or receipt via email on a transaction-by-transaction basis from the POS ‘Totals’ menu.

Finally, the ‘Job’s Email Address’ option only pertains to this customer if they are using Job Accounts.

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

On Eagle Release 24.1 and higher, 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.

Highlight the name from the list and click 'Change' to launch the Customer Contact dialog box.

Here, you can indicate if this is the Primary contact or if this person should be excluded from email lists.

The 'Statements' drop down gives you the ability to send files to recipients as a 'Carbon Copy' or a 'Blind Carbon Copy'.

You can also designate this contact to receive selected types of POS transactions.

Press 'OK' to save your changes.

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

From the Notes tab, activate the 'Type' dropdown and select 'Note Type 11'.

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.

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

iNet eInvoices Set-Up requires you to verify that the File Transfer Manager is enabled and running.

You will need to modify those Customer records that you wish to receive documents via email. By reviewing the various options available on the Miscellaneous and Contacts tabs you can customize exactly what is transmitted to your clients.

Be sure to watch the next course in this Training on Demand Agenda for step by step instructions on e-mailing POS transactions as well as historical saved images.