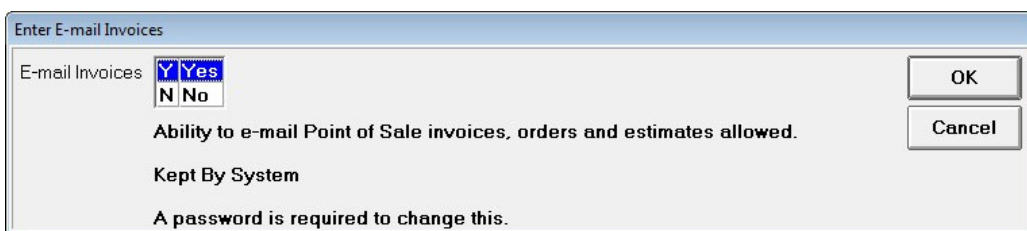In order to e-mail POS transactions and invoices/credits, you must have the following system options enabled on your system:

1. E-mail Invoices on System
2. PDF Invoice & Receipt Archiving on System
3. Eagle for Windows Document Imaging on System

If you are unsure about your system configuration, contact your Epicor Customer Account Manager

Options ID# 5784: 'iNet e-mail POS invoices on system' will need to be set to Yes.

Enter E-mail Invoices	
E-mail Invoices **Y Yes** / N No	OK / Cancel
Ability to e-mail Point of Sale invoices, orders and estimates allowed.	
Kept By System	
A password is required to change this.	

Options ID# 852: 'PDF Invoice & Receipt Archiving on system' will need to be set to Yes.
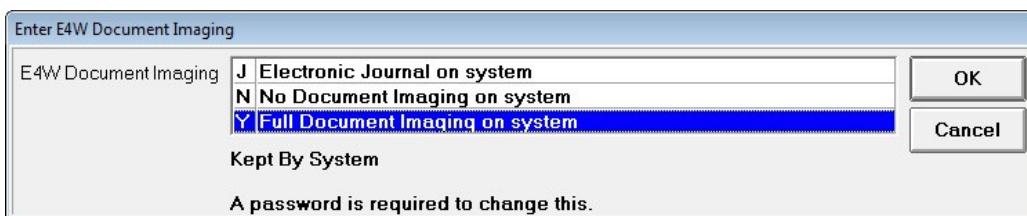
Enter Archive PDF Invc & Rcpts	
Archive PDF Invc & Rcpts **Y Yes** / N No	OK / Cancel
Kept By System	
A password is required to change this.	

Options ID# 3350: 'Eagle For Windows Document Imaging on system', will need to be set to Yes.

Enter E4W Document Imaging	
E4W Document Imaging	J Electronic Journal on system
	N No Document Imaging on system
	Y Full Document Imaging on system
	OK / Cancel
Kept By System	
A password is required to change this.	

Other options to set-up include the following:

Options ID# 9: 'User e-mail address': This option is used to override Option ID# 5786 listed above for POS transactions that are NOT invoices or credits. Thus, any other POS transactions that get e-mailed to customers (such as orders, special orders, estimates, etc.) can reflect the user's e-mail who logs into POS. If this option is blank, then the system will default to the e-mail address entered in Option ID# 5786 (From e-mail address for e-mail invoices).

Options ID# 5786: 'From e-mail address for e-mail invoices': This option determines the "sending e-mail address" so when your customers receive an e-mailed invoice or credit, then this will display as the "sender" of the e-mail in your customer's e-mail inbox.

Options ID#8114: 'Default for "Group By" when emailing from Document Archive Viewer'.

Set to 'C' to send one email when multiple documents are selected for transmission. 'N' will send a separate email to the customer for each document.

Enter Default "Group By"

Default "Group By"	C	Customer
	N	None

Applies when using Misc Menu "Email Documents" in the Document Archive Viewer (DOC).

This is the default choice for the "Group By" field in the Email Documents dialog.

Set to C to send one email with documents combined into one PDF attachment.

Set to N to send one email per document.

Kept By System (can be changed)

OK   Cancel

Options ID# 8707: 'Default Email Domain': Enter your e-mail domain (anything after the '@' sign in the e-mail address). By entering your e-mail domain here, throughout the options where an e-mail address is requested, anything PRIOR to the '@' sign just needs to be entered.

Enter Default Email Domain

Default Email Domain [   ]

Specify the default domain to use with any store email addresses set with other options where you do not explicitly include an email domain. For example, if you specify 'joe.smith' for your store's email address without including the domain name in the address and specify 'my.domain.com' as your default email domain, then joe.smith@my.domain.com will be used as your store's email address. This option can be used with the store email address and the from email addresses for statements, invoices, and purchase orders.

Kept By System (can be changed)

OK   Cancel

Options ID# 8980: 'Email address used by Job Accounts': If you use jobs, this option determines who receives e-mailed invoices and statements: the main account (Job 0) or the individual jobs

Enter Job Email address

Job Email address

B	Both Main Account's plus Job's email address	
E	Exception. Job's email address or if blank use Main Account's	
J	Job's email address	
M	Main Account's email address	

Emailed POS documents and A/R statements use this option to determine what email address(es) are used when emailing to a job account.

Set to J to use the email address(es) for the job.
Set to M to use the email address(es) for the main account.
Set to E to use the email address(es) for the job and if none, then use the main account's.
Set to B to use the email address(es) for the main account plus the job's.

Use the "Job's Email Address" flag in Customer Maintenance to override this option.
If the "Job's Email Address" is blank, how this option is set will determine what email address(es) are used.
Otherwise, it will use the email address(es) based upon how this flag is set for the job in Customer Maintenance.

Note: This flag only applies to jobs. A transaction for the main account will always use the email address(es) entered for the main account.

Kept By System

Options ID# 9784: 'Prompt to Email Invoices/Credits' gives you the option to have a prompt display at POS. You can have the selection default to a Yes or No response.

Enter Prompt to email?

Prompt to email?	N	Do Not Prompt		OK
	Y	Prompt with a default of Yes		
	Z	Prompt with a default of No		Cancel

This option only applies to customer's which are setup to receive their invoices/credits by email. (Customer Maintenance Misc tab's Email Invoice/Credit is not set to N or blank.)

This option determines if the clerk is prompted asking if the customer's invoice/credit should be emailed.

When set to N there will be no prompt. The customer's invoice/credit will be emailed with no intervention.

When set to Y POS displays a prompt asking if email should be sent and it defaults the answer to Yes.

When set to Z POS displays a prompt asking if email should be sent and it defaults the answer to No.

Kept By System (can be changed)

Maintenance of contact email addresses and Customer Maintenance flags are driven by several security bits. Be sure to review the following Security Bits prior to using einvoices.

Number	Sub System	Program	Capability
733	A/R	CUS MNT	Ability to add/change/delete customer contacts (names)
1104	A/R	CUS MNT	View MCR Contacts tab
131	A/R	CUS MNT	Access Customer Maintenance (MCR)
733	A/R	CUS MNT	Ability to add/change/delete customer contacts (names)
895	A/R	CUS MNT	Ability to make changes on the Misc tab of Customer Maintenance