Now that you have completed the 'eInvoices Overview' and 'eInvoices Set-Up and Configuration' courses, it is time to address the actual use of eInvoices.

With this purchase option from Eagle you are able to provide a virtual copy of invoices and credits, and other saved transactions through email.

In today's module, we will review the many functions available and discuss how it can be utilized by your Back Office personnel and how it works in conjunction with Point of Sale.

The eInvoice feature allows employees working in the Accounts Receivable department to e-mail a copy of a PDF receipt or an invoice to a customer.

To send a single invoice from Quick Recall, simply double click on the transaction [pause], view the image [pause] and select 'Email Invoice to Customer' from the 'Miscellaneous' menu.

If you are using a receipt printer, then the Miscellaneous menu will offer to 'Email Receipt to Customer'.

Once an option is selected, you can either allow Eagle to use the e-mail address saved in Customer Maintenance and leave the 'Email Address' blank, [pause] or enter another e-mail address here.

Customers do not have to be set up to receive e-mailed invoices. You can enter an e-mail address for this single occurrence. However, be sure to select 'P' for 'PDF only' as the 'Email Format'.

If the customer is already set in Customer Maintenance to receive e-mailed invoices, then you can continue with option 'D', 'Use MCR Email Format'.

If no 'Email Address' is entered, and the customer does not have one saved in Customer Maintenance, pressing the 'OK' button will return the message, 'No email address setup for customer'.

When a valid email address is entered or the customer is set-up properly in MCR, you will receive a confirmation message that your invoice or receipt has been mailed.

Multiple invoices can be selected through the Document Archive Viewer and quickly emailed.

With Eagle Release 25 and higher, the system can be set up to send a single e-mail to your customer with one PDF attachment that includes all of the selected invoices.

To access the Document Archive Viewer enter 'DOC', 'DAV' or 'VIEWDAV' in the Launch bar.

To add checkboxes to your viewer and then save this change permanently, hover your cursor over any heading, right-mouse click and then select 'Checkboxes'.

Checkboxes are added to the far left-hand side of the Document Archive Viewer.

To save this as your default view, click on the 'File' option at the very top left-hand corner of the screen and select 'Save View…'

Choose the 'Save How Much of the View?' option that says 'Grid Layout Only' then press 'OK'.

Choose 'Default View' and press the 'Save' button.

When prompted about replacing the current view, press 'Yes'.

Now that the checkboxes are part of the viewer, identify the customer.

After the customer is entered, use the 'Date' and 'Thru' fields to further filter the grid. Press 'Refresh'. [pause]

Begin clicking on the checkboxes to select the documents.

Press the 'Misc' button on the ribbon menu and select the option 'Email Documents'.

Leave the 'Email Address' field blank to use the one that is set-up in Customer Maintenance.

If no email address exists for this account or you want to send these documents to a different address, enter it here.

For customers on Eagle Release 24.1 or earlier, when multiple transactions are selected, the system will send your customer multiple emails with a single PDF attachment per email that contains the invoice, receipt or credit.

With Eagle Release 25 and higher you can indicate the 'Group By' setting.

If you select 'C' the system will combine all selected documents into a single PDF and email your customer a single file.

If you select 'N' the system will send multiple emails to your customer with a single PDF attachment per email.

Press the 'OK' button. A warning appears letting you know that the customer record should be set to transmit in the PDF format.

Press 'OK' again to send the email.

If a customer is set up within MCR to receive invoices and credits via email, they will automatically receive their invoices and receipts at the time that it prints.

If the customer is set up to receive estimates, orders and special orders, then after the 'Total' key is pressed, you will be prompted to email the transaction. The default response is 'Yes'.

Selecting 'Yes' takes you to the finishing menu where you can choose to save with or without printing the transaction and a copy of the transaction is emailed to your customer.

However, if your customer is not set up to receive emails these transactions can still be emailed on the fly.

Enter the transaction as you normally would, then press the 'Total' key to display the 'Finish Order' screen.

Select 'Totals Menu'.

Next, select 'E-mail This Transaction'.

The ‘From Address’ and ‘From Name’ will automatically populate based on your settings in Options Configuration.

If the customer has an email address saved in Customer Maintenance, that will display in the ‘To Addresses’ area.

Up to 10 email addresses may be entered here.

If multiple email addresses are entered, be sure to enter each address on its own line.

Holding down the ‘CTRL’ key then pressing the ‘Enter’ key will create a new line.

Add anything needed to the ‘Subject’ or ‘Message’ fields.

Press the ‘OK’ button and you are returned to the ‘Finish Order’ menu.

iNet eInvoices helps save you time and money by providing multiple ways to transmit saved documents in Quick Recall and the Document Archive Viewer.

It allows you to transmit your customers Point of Sale receipts in an electronic and easy to manage format.

Review the setup documentation and get started emailing directly from your Eagle system today.