



Now that you have reviewed the Training on Demand courses that gave you an overview of eStatements and provided instruction on the required set-up, let's put it all together.

This segment will discuss how eStatements are run and how they can be implemented in your place of business.

We will go over the available eStatement email formats, running the A/R Statement Report and some recommended Best Practices.

Emailed statements can be sent in one of two formats dependent on your setting on each account in Customer Maintenance.

Embedded HTML statements send just the statement to your customer from your predetermined 'From email address'.

No message is sent along here with the statement.

When your customer opens their email from you, just the statement archived version will appear in the body of the email.

Emailed statements can also be sent as an attached HTML document.

With the attached HTML format, when your customer opens their email from you, they will see the following message:

Refer to the instructions in the previous Training on Demand course, 'eStatement Setup and Configuration' to alter this message.

The statement archived version of the customer's statement is attached to this email for your customer to double-click on and view.

Just like paper statements, you generate eStatements by running the Statement Report or RSM.

Customers can have statements just e-mailed, or both printed and emailed during a single statement run.



As long as the customer's 'Email & Fax Information' 'Statement' flag is set to 'Y' or 'X', statements will be transmitted.

For users that have Enhanced Fax capabilities, statements can also be faxed in the same run.

If you are printing statements and sending statements via email, be sure to use your designated Statement Printer identified in MPS.

For more information on printing Accounts Receivable statements, see the Training on Demand course titled, 'End of Month Statements'.

If you are emailing all statements simply spool them by selecting 'S', 'Spooler Only' in the 'Print To' field.

Set all the other desired RSM options, as you normally would.

On the 'From/To' page set the 'Email Statements' field to 'Y'.

Click 'Run'.

Save this RSM report to use each month.

The system creates a file containing all the statements to be emailed.

This file is compressed and placed in the file transfer manager directory.

The File Transfer Manager checks this directory every 15 seconds for new files to send.

When finished, it sends a summary email to the 'From Email Address' you set up in Options Configuration, containing a list of all the accounts to which statements were successfully emailed. And also sends a list of any accounts to which statements could not be emailed.

Any accounts in the latter group may not have a valid email address entered in the 'Contacts' tab of Customer Maintenance.



It is important to note that when statements are e-mailed, tiled invoices are not simultaneously e-mailed.

If you want invoices e-mailed to your customer, you will need to utilize iNet eInvoices. Contact your Epicor Customer Account Manager for any questions on adding that module.

Our recommended 'Best Practices' include configuring the Misc. tab in Customer Maintenance to point to Option 'A', 'HTML attachment'.

The included message creates a more personal experience as opposed to your customer opening their e-mail and only seeing their electronic statement.

Although you can both e-mail and print a single customer's statement simultaneously, it's recommended that you do not.

This can be potentially confusing to your customer.

If you set the 'Statements' flag to 'Y', set the 'Print Statements' flag on the 'Main' tab of Customer Maintenance to 'N'.

If you have available Account Codes located on the 'Misc' tab in MCR, you could use them to identify customers that are receiving statements via email versus a printed format.

The Customer Viewer within MCR can be filtered to identify those still receiving printed copies and those accounts could be encouraged to move on to electronic statements.

This move will eventually save you both time and money.

eStatements can assist you in reducing the use of labor, postage, statement forms and ink in your business.

You are able to provide a virtual copy of statements to your customers whenever one is requested and no more time will be wasted stuffing envelopes.

This function easy to use. After some initial setup you will be ready to begin sending statements by just clicking run.

