Text Messaging Overview

If you are an Eagle N Series customer, the Text Messaging feature will give you the ability to send text messages on demand from Accounts Receivable functions and in Point of Sale. This product is available on software release 26 and higher.

You can also notify customers when a Rain Check or Special Order item has been received, alert customers that a Service/Repair order has had a status change and verify your message was transmitted through the SHOWLOGS application.

Let’s take a look at how this works.

You can transmit a text message at any time from MCR, MOI, ROA, or POS.

From Point of Sale, enter the customer number and press ‘Display’.

Click the ‘Send Text’ button.

Enter the customer’s Mobile Phone number or use a number from the drop down list.

Type your message and press ‘Ok’.

The customer will receive the text message with a greeting based on your Options Configuration.

You can also open the Customer Viewer anywhere it is available and highlight the customer you wish to send a text.

Press ‘Display’.

Choose ‘Send Text’ and then enter or select the correct Mobile Phone number.

Your message can contain up to 100 characters.

When creating a new transaction or recalling an existing transaction, from the ‘Total’ screen, click the ‘Miscellaneous’ button.

Choose option ‘N’, to ‘Text Customer Now’ tol display the dialog window.

The text will contain the transaction’s Document Number.

You can also text on demand when creating a Credit Memo, Layaway, Order, Special Order, Estimate, Transfer and Received on Account.

Additionally, Orders, Special Orders, Estimates, and Layaways will now display option ‘G’ on the Finish Menu.

Select ‘T’, ‘Text Customer Now’.

On Epicor Eagle software release 26.1 and higher, these four applications have the new Text button on the toolbar.

Select a mobile number from the dropdown or type in the phone number.

Non-specific texts are recorded to the customer’s activity notes.

If you are using the features of ‘Advanced Rainchecks’ you can now offer the customer a text notification when the item is back in stock.

In Point of Sale, the existing rain check dialog will have a new field labeled ‘Text Message?’.

Enter the cell number as 10 digits, without dashes or parentheses if it is not displayed.

When an item that has outstanding rain checks is received by the Receiving Report or RRP, the system will send a text message to the customer.

A text will be sent to each customer that has a rain check on file for that item.

The Receiving Report has also been updated to identify when a text notification has been sent.

If a customer receives notification that the item is back in-stock but fails to redeem the rain check, no other notifications will be sent on subsequent receipts of that item.

When creating a Special Order, choice ‘G’ is available on the ‘Finish Special Order Menu’.

On the ‘Fax, Email, Text’ Menu, select ‘S’ to ‘Request Text when Special Orders Received’.

Enter or select the customer’s Mobile Phone number.

Set ‘Send Text?’ to ‘Yes’.

Click ‘OK’ and complete the transaction as you normally would.

When the item is received using the RRP Receiving Report with Update Option ‘F’ to finalize, the system will generate a text message notification to the customer.

Backordered items that are not sourced to a specific Purchase Order will receive a text if you use the Receiving Report Option ‘P’ to ‘Allocate Uncommitted Receipts to POS Backorders’.

If multiple special order items have been received for a customer order, only one text will be sent.

Instead of showing the item’s description, the text will display the verbiage ‘Multiple Items Received’.

The Receiving Report has also been updated to document when a text notification has been sent.

On software release 26.1 and higher, texts that are specific to a POS transaction are recorded in the Document Notes.

Display the transaction in POS.

From the header Menu button, select ‘Enter Document Notes or Delivery Instructions’.

When an order is fully invoiced it can be viewed in QuickRecall.

In Point Of Sale, when a service order’s status is changed this dialog will appear.

Enter the cell number as 10 digits, without dashes or parentheses if it is not displayed.

Set ‘Send Text?’ to Yes.

Clicking OK, generate a text to the customer.

You can verify text messages were sent by reviewing the related document in SHOWLOG.

Open the ‘Text Message Log’.

The date, time and mobile phone number are identified.

Be sure to review the attached documentation located in the Course Materials to set up the required Options and default information before you begin using Eagle Text Messaging.

Then you can be on your way to sending texts on demand, when raincheck and special orders are received, and when service repairs change status.

You can also easily track the transmission of these messages using the SHOWLOGS function.

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