What's New on Release 25 Update

Welcome to Eagle Release 25 Update (server Level 37). This document summarizes the new features and enhancements. Use the red links below to take you to a particular section of this document (POS enhancements, Inventory enhancements, etc.). For full-featured help for a particular new feature or enhancement, click its blue underlined text. *Note:* It is highly recommended that Eagle Analytics users upgrade to Compass 14 when upgrading to Eagle Release 25 Update.

Eagle N Series Enhancements

- Physical Inventory Streamlining – details are covered in the 9th entry in the Windows Inventory Enhancements section below.
- Eagle N Series – launching Eagle N Series applications should be noticeable faster. See 1st entry in Miscellaneous Enhancements below for more info.
- Eagle N Series – we have made a set of changes to support the windows 125% display. See 2nd entry in Miscellaneous Enhancements below for more info.

- Streamlined Prepaid Voucher entry in ATMU – details is covered in the 2nd entry in the Accounts Payable/General Ledger enhancements section below.
- Purchasing & Receiving (MPO) – New <Transmit> button on the Ribbon or Toolbar. Please see the Windows Purchasing & Receiving Enhancements section below.

POS Enhancements

- The existing "Subtotals on Invoices" capability which allows printing subtotals by department, or class, or fineline for POS transactions, has been enhanced to allow you to select which transaction types will include subtotals, and you can now print subtotals for not only dollars but also units and/or weight.
  - New option 9266 "Subtotals on Invoices - print on these transaction types" allows the user to print subtotals on transaction types of their choice..
  - New option 9267 "Subtotals on Invoices - print subtotals for?" allows choices of printing subtotals for dollars, units or weight (any combination of the 3)
- Enhancement to the Deposit Activity Viewer -- the system now records the bankcard, in the form of a token, used to pay for a deposit in 3 new columns:
  - Bankcard Used – token for the bankcard
  - Bankcard Type – the type of card
  - Bankcard Exp – expiration MM/YY
- Refunds can now be credited to the original bankcard used for the sale – The new E4W option 9439 "Refund using same bankcard when original payment is prepaid deposit" can be used to issue the credit for a customer refund to the original credit card which paid for the deposit.
- New License Information in the Customer Returns Viewer – if you are using Flexible Consumer Information collection at Point Of Sale (Option 1498 "Flexible Consumer Information collection enabled?" is set to Yes), there are 2 new columns in this viewer populated for the DL and license issuer (i.e. State) entered in the Flexible Consumer Information dialog which comes up in totals for returns.
  - Driver's License
  - Issuer ID
- The Customer Number is now recorded in the serial number field when using Dynamic Coupons – if you are using Dynamic Coupon's (Option 9871 "Dynamic Coupons on System" is set to Yes), serialized coupons will now include the customer the coupon was issued to. For coupons which are serialized, the system now records the customer number along with the serial number at the time the coupon is issued and printed in POS. When looking at the available serial numbers in Inventory Maintenance's "Serial Number Maintenance" you will see the customer's account number in the new column "Coupon Customer".
- Loyalty ID Number can now be entered/changed in Point of Sale's Customer QuickAdd. Previously this was display-only. (Do It Best Rewards loyalty users)
- New Header Level field Post Components at POS – A new flag has been added in Modify Bill of Materials called "Post Components at POS". When this flag is checked in Modify Bill of Materials, and the Bill of Materials is posted into Point of Sale from the Bill of Materials Posting window, the components will post as normal skus into the body of the transaction instead of the single header Bill of Materials sku.
- Enhancement to Tax Free Holiday – This feature has been enhanced to support states where clothing/footwear is tax exempt on a portion of the selling price and taxable on the amount over that threshold. Currently, there are two states with this type of exemption: Massachusetts and Rhode Island
- Modification to feature "Adding, Viewing, and Modifying Notes on Saved Transactions" – Entering document notes or delivery instructions on a saved POS transaction has been changed to archive the note into the invoice archive once the order has been fully invoiced.

Previously once the order (or special order) was fully invoiced, you could no longer refer back to the note – it was not saved.

- <u>Enhancement to "Service & Repair"</u> – For users who have option 1093 "Service and Repair on System" set to 'Yes', and option 9242 "Field Label for Service Order Identifier" set to 'S' (serial number) you can now change the service order's serial number after the order has been created.

- <u>New E4W Option 1626 "Price override policy used in Point of Sale"</u> gives you an alternative method for controlling a clerk's flexibility when overriding an item's price in Point of Sale. If your business profile is such that using promotion prices is not always practical, then this method may be a good fit for you. To learn more contact your Epicor representative to arrange a review with a senior business consultant.
  - Option 1 -- Minimum GP %
  - Option 2 -- Maximum $'s Off -- the price override will be allowed in the $'s off the normal selling price does not exceed one of the two maximum $'s off

- <u>Point of Sale 'Special Fee' Enhancement</u> – Special Fee can now be set up so that it will not be applied for certain transaction types such as Transfers. To set up a transaction type exclusion for an existing special fee in Inventory Maintenance (IMU), click on the Special Fee Code hyperlink on the Misc tab. Select the code and click <Change>. Use 'Do Not Apply On' to check the transaction types you do not want that special fee to be applied to and click <OK> to save the change.

- <u>Charitable Donations</u> – As more consumers move to electronic payments, the idea of dropping change into a donation jar at the register is fading. Consumers and retailers want to make donations to charities at the point of purchase. Incorporating a "roundup" or "donate a dollar" feature into their Eagle will reduce overhead for retailers and increase charitable donations.

- <u>New Option 9134 "Immediately Post when item's UPC is scanned?"</u> allows you to configure POS to immediately post the item when it is scanned if you are using the existing option 9133 "Increment posting quantity by UPC package quantity?"

- Ace Retailers – For stores that are participating in the Ace Customer Segmentation program and have option 1611 "Prompt for Ace customer segment type in MCR?" set to "Y": When adding a customer in POS using Customer QuickAdd, after entering all customer info such as name, address, etc., and clicking on "OK", the cashier will be prompted to choose if the customer is a business. If they are a business, the cashier chooses "Y"; otherwise they choose "N".

- EMV Card Support—These are smart cards (also called chip cards or IC cards) which store their data on integrated circuits rather than magnetic stripes (although many EMV cards also have stripes for backward compatibility). For more information, please visit: <u>www.epicor.com/emv</u>

Windows Inventory Enhancements

- Ace Retailers –The five Ace Discovery Codes have been added as new columns to the Inventory Viewer. You must set Option 8287 "Display the Inventory Viewer in expanded format?" to the new choice "A=HWHC for ACE". The new columns are the following and they are initially hidden:
  - Ace Disc Express
  - Ace Disc Conv
  - Ace Disc Core
  - Ace Disc Super
  - Ace Disc Other

- <u>Printing labels for a single item in Inventory Maintenance</u> -- "Starting Column" and "Starting Row" are now available when printing a label using Miscellaneous function "Print a Label". If you use sheet stock you can use the new fields to indicate the column and row for the next label to print.

- New Columns have been added in the Purchase History Viewer (Accessed by clicking on the Date of Last Receipt hyperlink or using Goto Menu "Item Purchase History Viewer").
  - Type – the PO's Order Type for example Credit, Normal, Generated, Future

- Mfg Part # – the item's current Manufacturer Part Number from IMU
- Alt Part # – the item's current Vendor Part # for the PO's vendor from IMU
- Adder Type – PO Adder Type if one was used on that PO
- Cost Discount Code (only applies to customers with Option 1054 "Mid-states special on system"=Y – the item's Cost Discount Code entered in MPO)
- Discount Percentage (only applies to customers with Option 1054 "Mid-states special on system"=Y – the item's cost discount percentage entered in MPO)

- Enhancement to Product Analysis Report (RPA) – the following Sales Periods have been added to the RPA report when analyzing by Units Sold:
  - A – Last 2 periods
  - B – Last 3 periods
  - C – Last 4 periods
  - D – Last 5 periods
  - E – Last 6 periods
  - F – Last 7 periods
  - G – Last 8 periods
  - H – Last 9 periods
  - I – Last 10 periods
  - J – Last 11 periods

- New "Alternate Vendor Changes Viewer" – New viewer available on the Misc Menu of the Inventory Maintenance Changes Viewer. Use 'View Alternate Vendor Changes' to see all alternate vendor additions, changes, and deletions by SKU/Vendor as well as by Date. Requires MSY option 808 "Inventory Maintenance Changes Viewer on system."

- Physical Inventory Streamlining – the focus of streamlining the Physical Inventory subsystem has been to:
  - Make the process easier by centralizing the workflow into one application, Physical Inventory Posting (PIP).
    - New PIP toolbar button <Count> which provides several new functions:
      - Create a count list using the Inventory Viewer where the user has imported a list created with a Compass query, or use filters in the inventory viewer to isolate the items to count.
      - Load initial QOH snapshot and print count sheets from PIP for itemsparts on an ItemPart List – optionally using a new laser count sheet format (only applies to counts where Eagle Mobile Physical Inventory is being used)
      - If you use Eagle Mobile and have option 1155 "Mobile Use Physical Inventory with Count List" set to Yes, once the list has been created click 'Assign List to Mobile User.' The list will in appear in that user's Mobile device when they use 'Count from List.'
      - Print count sheets from PIP for 'un-posted' or 'variances only' itemsparts from an ItemPart List.
    - New PIP toolbar button <Finalize> – Use this button to finalize counts from PIP
      - All counts or zero variance itemsparts only
  - Add more flexibility to how you select the itemsparts to be counted and manage those itemsparts as a discrete set through the counting, reviewing, and finalizing workflow.
  - Additional changes/enhancements:
    - PIP – four additional columns have been added: UPC, Date Last Sale, Avg Cost Variance (Average Cost * Variance), Stk U/M, Replacement Cost, and Repl Cost Variance (Replacement Cost * Variance).
    - RPI/PIP – Using Item Lists to manage counts was previously part of Eagle Mobile PI (Option 1100 "Eagle Mobile Inventory on System" = Yes) and is now also available for Eagle N Series (Option 8888 "Eagle N Series on System" = Yes).

- RPI – In addition to finalizing counts for an Item List you can now also load and print count sheets for items in an ItemPart List
- RPI – New Count Sheet option V "Print Variances Only" which allows you to print count sheets for itemsparts which have been counted and show a variance, and you want to have re-counted.
- RPI – Count Sheet and Reconcile options each have a new choice L = Exclude items on Item Lists. When running RPI using standard selection criteria (not using an Item List) you need to use Option L to ensure that items on Physical Inventory type items lists are not included.
- RPI – Laser Count Sheets can be printed. The benefits of the laser count sheets over the existing count sheets are:
  - Prints UPC Barcode – if an item doesn't have a UPC, the barcode representation of the sku will print.
    - Updated look, easier to read.
- Enhancements to Item Lists -- these enhancements have been made to Item Lists (option 9585 "Inventory Item Lists Enabled" set to "Yes")
  - Multi-store users can assign a store to a list (required on Physical Inventory lists)
  - 4 new security bits to control the ability to add, display, change, and delete each type of item list in the LISTS function:
    - 1111 "Ability to access Physical Inventory Item Lists"
    - 1112 "Ability to access Dynamic Promotion Item Lists"
    - 1113 "Ability to access Ordering Item Lists"
    - 1114 "Ability to access Label Item Lists"
  - Item List Header Viewer – access this new viewer from the Misc Menu of the LISTS function. Use "Maintain All Item Lists" to bring up this new viewer that displays the existing item lists -- see all lists, or all lists for a specific type (B = Dynamic Promotions, L = Label, O = Ordering, P = Physical Inventory. Use this viewer to quickly select and delete old item lists.
  - Enter the list's purpose or instructions for that list in the new Comment field.

Maintain Dynamic Promotions (MDP) Enhancements

- Dynamic Promotions -- 3 new types have been added:
  - Buy $t of 'x' get 'y' free or discounted (i.e. Spend $50 on boots, get $20 off socks)
  - Buy $t of 'x' get an immediate credit (i.e. Spend $150 on bulbs, get a $10 credit)
  - Buy $t of 'x' get a gift card (i.e. Spend $100 on tools, get a $10 gift card)
- In Maintain Dynamic Promotions (MDP) you can now enter SKU and Store (All or specific store) to see the list of Dynamic Promotions where that item is either a qualifier and/or a recipient. This only applies to Dynamic Promotions which have an item list. Set 'Show Past Promotions' to 'No' so that only current and future promotions are displayed.
- New <Dynamic Promotions> button in Inventory Maintenance's 'Quantity Break and Promotion Pricing' dialog -- Accessed through the Misc button of Inventory Maintenance, this dialog has a new button <Dynamic Promotions> available if option 1081 "Dynamic Promotions on System" is set to Yes. When pressed, it will show a list of current and upcoming Dynamic Promotions where the SKU is either a qualifier and/or a recipient.
- Creating an item list in the LISTS function allows you to create an item list for all items in a department, class, fineline, manufacturer, or primary vendor.

Windows Purchasing & Receiving Enhancements

- "Posting Cost" column is available in Purchasing and Receiving posting when using the Inventory Viewer to add multiple items to a PO. When <Select> is pressed to paste back and add the items with a quantity in the Posting Quantity column, the cost entered in Posting Cost will be entered as the PO cost for that item. Additionally using "Export PO to Worksheet" to quickly edit and paste back the suggested quantities of a PO now also exports the item's cost to make changes to it as well.
  - Limitations of Posting Cost:
  - For customers using Buyer's Purchasing (Option 1051 "Buyer's Purchasing on System" = Yes) using the Inventory Viewer in the PO Worksheet does not support Posting Cost.
  - Not supported on a status R (in receiving) purchase order.
  - Posting Cost is ignored if a Posting Quantity is not entered.
  - Posting Cost has not been added to the High Performance inventory viewer (which does have Posting Quantity).
  - Posting Cost is not available in Custom SKU Lists.
- Suggested order Report (RSO) – New choice 'A' "Abbreviated Report Format (Large Format only)" has been added to the list of Other Options. Option A was added for Large Format users who are finding the font-size too small, making the RSO difficult to read. When the RSO is run with Option A the report detail line prints: Line #, Store, SKU, Description, Mfg Part No, New Order qty, Stk U/M, QOH, QOO, Order Point, Max Stock Level, Std Pk, Order Multiple, Current Month sales units, Last Month sales units, YTD sales units, and last 12 months sales units.
- Purchasing & Receiving (MPO) – New <Transmit> button on the Ribbon or Toolbar. If the displayed PO's vendor matches your catalog's MTCC vendor, EPO will display with that PO entered in the from/to. Just press <Run> to transmit. If the displayed PO's vendor has a Network ID and Code entered in MVR, EDIPO will display with that PO entered in the form/to. So just press <Run>. Otherwise, RPO will come up for you to either fax or email the PO to the vendor.

Windows Accounts Receivable Enhancements

- New "Ace Customer Segment" Column in the Customer Viewer for Ace Retailers shows the value of the "Segment Type" field that appears on the Additional Fields dialog of the Customer Maintenance Misc tab.
  - Values are:
    - C = Homeowner/DIY
    - D = Contractor
    - E = Religious Organization
    - F = Retail Business
    - G = Non-Profit Organization
    - H = Property Management
    - I = Service Industry
    - J = Restaurant
    - K = School/Education
    - L = Municipality/Government
    - M = Manufacturer
    - N = Other Business
- Customer Contacts Changes Viewer – New viewer available from the Customer Maintenance Changes Viewer. Click on the Customer Contact Changes hyperlink or use Misc Menu 'View Customer Contact Changes' to see all customer contact additions, changes and deletions by Customer as well as By Date. Requires MSY option 802 "Customer Maintenance Changes Viewer on system".

Accounts Payable/General Ledger Enhancements

- New option reduces the number of keystrokes in New A/P Transaction (ATMU) when adding a prepaid voucher. Set new Option 437 "Allow streamlined Prepaid Voucher entry in ATMU?" to Yes in Options Configuration. Prior to this enhancement, you added a prepaid voucher on the Main tab of ATMU using tab or enter to move to and fill in the 5 fields relevant to a prepaid. With Option 437 set to Yes, simply click on the ribbon's <Prepaid> button which displays the Add Prepaid dialog with the required fields: Vendor, Vendor Ref No, Check Number, Check Date, and Check Amount. After clicking <Add> the clerk is prompted to enter the G/L distribution.
- New Great Plains Integration – General Ledger, Accounts Payable, and Accounts Receivable transactions can now pass to Microsoft® Dynamics GP.

Telecommunications/National Account Enhancements

- The Five Discovery Codes have been added as new columns to the Inventory Viewer. You must set Option 8287 "Display the Inventory Viewer in expanded format?" to the new choice "A=HWHC for ACE". The new columns are the following and they are initially hidden: (For Ace Retailers)
    - Ace Disc Express
    - Ace Disc Conv
    - Ace Disc Core
    - Ace Disc Super
    - Ace Disc Other
- Ace new Member Signup (NMSU) enhancements in Point of Sale:
    - After scanning a new rewards card and submitting the phone number, the customer information returned from Ace will now include an email address if it is available. The cashier can verify and, if need be, edit the email in the New Member Signup screen. The revised email will be sent to and updated for the customer at Ace Corporate.
    - The new field "Business" has been added to the Sign-Up dialog. It defaults to N to indicate the customer is Homeowner/DIY, but should be changed to Y if the account is for a Business. This information will be sent along with the application to Ace.
- New "Ace Customer Segment" Column in the Customer Viewer for Ace Retailers shows the value of the "Segment Type" field that appears on the Additional Fields dialog of the Customer Maintenance Misc tab.
    - Values are:
        - C = Homeowner/DIY
        - D = Contractor
        - E = Religious Organization
        - F = Retail Business
        - G = Non-Profit Organization
        - H = Property Management
        - I = Service Industry
        - J = Restaurant
        - K = School/Education
        - L = Municipality/Government
        - M = Manufacturer
        - N = Other Business
- Do It Best Rewards Loyalty enhancement -- users can now enter/change the Loyalty ID number in Point of Sale's Customer QuickAdd.(Previously it was display-only)

- Do It Best Members – When processing order confirmations from DIB using ERP, you can choose to use PO's provided in the order confirmation by DIB instead of appending to a target PO. To do this, on the ERP From/To tab, for the 'use incoming PO numbers' prompt, select "Y - Reconcile to P.O. #'s in incoming invoices'. When selected, this will use the incoming PO number in the order confirmation instead of appending to the target PO.

Miscellaneous Enhancements

- Eagle N Series – Launching Eagle N Series applications should be noticeable faster. Although all cases should be faster the results will vary based on usage profile. For example: things like using the Ribbon versus toolbar, using Compass tabs, using Special Security add seconds to the launch.
- Eagle N Series – We have made a set of changes to improve the user-interface of Eagle N Series when the windows display is set to 125%. But note that some aspects of Eagle applications may not fit on the screens or dropdowns. These refinements will be evaluated and may be addressed on a future release. Epicor recommends using 125% display on non-POS stations.
- New Online Help – The online help in Eagle for Windows and Eagle N Series will now display from the cloud which is a live help file accessed over the internet. There are 12 versions of help files in the cloud and "Cloud Help" will pick the right version per the system configuration: based on English or French, then based on Eagle N Series or Eagle, then based on Eagle or SSE (small store edition) or Auto Eagle.
    - Starting with Level 25 a very minimal help file is included on the E4W client CD/setup. The Level 25 Advance will set option 260 "Eagle Client Help File Location" to C=Cloud (Internet), and the default is C for new customers.
    - A local help file is available for stations that cannot access Cloud Help. For each terminal needing a local help file, the user can download and install a Windows Installer (MSI) file using the procedure which is documented in the minimal help file that displays when Option 260 is set to L=Local.
- Enhancement to E4W Option 560 "Terminal Timeout on System." This existing option which controls closing all Eagle for Windows applications after a period of inactivity has the new choice: "E=Except Ebrowser". Setting this option to E is just like setting it to Y with the exception that Ebrowser will not be closed when the timeout defined in Option 561 is reached. Instead, Ebrowser remains open after an automatic signed off to reset security to the default user.
- New viewer "Printers & Channels" is the replacement for a legacy function MPS(Modify Printer Status). This viewer can be accessed by typing MPS in the Eagle Browser's launch bar or selecting "Printers & Channels" on the System Management Menu. Within the viewer, you have the ability to view, add, change, and delete printer configurations based on current security bits
    - 168 -- Access
    - 169 -- Change
    - 170 -- Delete
    - 171 -- Add
- Enhancements to streamline emailing or faxing Point of Sale documents -- Document Archive Viewer (DOC or DAV)
    - New columns have been added: "Codes" -- Customer account codes 1 - 4 from Customer Maintenance (MCR), and also as individual columns "Code 1", "Code 2", "Code 3", and "Code 4".
    - When emailing multiple invoices to a customer, the system can now send just one email with one PDF attachment where all selected documents are appended into one document.

- New "Fax Documents" choice on the Misc Menu. This requires option 5039 "Enhanced Fax Capabilities" and 5046 "Enhanced Fax setup is completed". It allows faxing of Point of Sale invoices, credit memos and PDF receipts. Like the new email "Group By" feature, PDF documents for the same customer and store are combined into a single fax request.
- Barcode Scanning is now available in non-Point of Sale applications. Barcode Scanning is now available to perform SKU lookup in Inventory Maintenance, Purchasing/Receiving, Customer Maintenance, and Vendor Maintenance.
- Point of Rental Enterprise Integration is now available for the Eagle system (Cloud Point of Rental not Supported).
    - More fixed asset maintenance and use tracking
    - More depreciation schedules
    - Commission reporting options
    - Mobile App available
- Vendor Report Card – Manage vendor relationships by measuring vendor performance
    - Vendor Report Card is vendor performance analytics
    - Output of vendor data in Excel
    - Vendor Market Basket
    - Over 100 new fields of data in Vendor Maintenance (MVR) – mapped to Compass
- Gift and List Registry – Engage consumers by providing an online tool to manage their gift and project lists
    - Online in-store or out-of-store, inventory searchable registry that does not require iNet, but works with iNet
    - Registrants can pre-populate 'Projects Lists' to aid the registrant.
    - Items can be decremented from the list when they are purchased.
    - Registries can be communicated – may be public or private.
    - Consumers can find registries/lists in the store or online.
    - Consumers can purchase through iNet or Phone. Information about the retailer is available, so the consumer can contact the store to make a purchase.
- Weblinks – URL's that can be attached to individual Eagle Business Objects. Currently links can be attached to items, customers, and vendors. The links (URL's) can be to websites, images, PDF files, etc. as long as it has an accessible URL.

Security Enhancements

- The L37 Advance will set new bits 1111 thru 1114 to Yes if bit 954 "Ability to access Item List Maintenance" is Yes.
- 1111 "Ability to access Physical Inventory Item Lists"
- 1112 "Ability to access Dynamic Promotion Item Lists"
- 1113 "Ability to access Ordering Item Lists"
- 1114 "Ability to access Label Item Lists"
- 1115 "Ability to stop the pharmacy listener"
- 1116 "PIP - Ability to add or delete on a count list which is locked"
- 1117 "Manager Override (MO) -- Allow price override if maximum $'s off exceeded"

Pharmacy Enhancements

- Pseudoephedrine Tracking (option 9421 "Over the Counter Controlled Substance Tracking on System" = Yes) – Besides tracking over-the-counter (OTC) products containing pseudoephedrine, you can now define and track the sale of other types of OTC items. Just as

with items containing pseudoephedrine, the sale of these other types of OTC items will require consumer ID.

- All PMS interfaces:
  - New security bit 1115 "Ability to stop the pharmacy listener" controls the ability to stop the pharmacy listener.
  - Prescription Record Management Viewer (VIEWRX) – these additional fields have been added to the RX file and are new columns in this viewer (collumns are initially hidden):
    - NDC Number – the NDC number will also print on AR statements when RSM is run with Option K "Print RX information"
    - Relationship
    - HIPAA
    - Safety Caps
    - Consult
  - New Pharmacy Pet Medication feature which is enabled with option 9772 "Pharmacy Pet Medication support on System".
- For PDX users (option 9171 "Pharmacy Integration on System" set to P):
  - At POS, the PDX interface now prompts for multiple HIPAA signatures if RX are sold for multiple patients on a single POS transaction (assuming they are flagged to capture a HIPAA signature).
  - If option 9767 "Pharmacy Prompt Clerk to Ask for Relationship to Patient" is Yes, the PDX interface now only prompts for HIPAA if the customer's relationship to the patient is Parent, POA, Self, or Guardian.