What's New on Release 26

Welcome to Eagle Release 26 (server Level 38). 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 14.00.1405 or higher when upgrading to Eagle Release 26.

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EMV Enhancements

- Retail Based Application (RBA) version 17 is available for the Ingenico isc250 signature capture pads. To download this new version, please refer to the job aid "Download New Software to Signature Capture/Debit Pads." This new version will be required in order to use:

  - Quick Payment which is controlled by Option 4901 "Minimum Amount to prompt for Signature on Credit Card approvals"

  - This new version resolves some outstanding issues with EMV when customer inserts their chip card prior to <Total>.

- EMV/Chip cards now support Option 4901 "Minimum Amount to prompt for Signature on Credit Card approvals" (also known as "Quick Payment").

POS Enhancements

- When you select Header Menu 8 "Add/Change Customer on Job" the customer's Name, Address, Phone Number, or Loyalty ID will automatically populate the matching fields in the Customer Add/Change window if the customer on the transaction matches the Default Cash Customer defined in Option 330 "Default Cash Customer on Transaction?"

- Existing option 9137 "Build reverse sort name in POS Customer QuickAdd" has 2 additional choices which allow suppression of spaces:

  - B = As entered, but without spaces (same as existing choice A "As entered", but without spaces)

  - Z = Yes, but without spaces (same as existing choice Y "Reverse Order" but without spaces)

    - A = JOHN DOE

    - B = JOHNDOE

    - Y = DOE JOHN

    - Z = DOEJOHN

- The filter selection on the "Type" column in QuickRecall now includes "Estimate" so you can see a list of archived estimate transactions.

- The Point of Sale Order Viewer will retain the last lookup, sort, and filters if Option 9340 "Retain POS Order Viewer lookup and keep it visible after F4 Select" is set to Yes. When enabled, this option allows you to create a "Work list" of Orders, maintain a desired transaction, and instantly go back to that list without losing your search criteria. If this option is set to No, the viewer is closed after a transaction is selected.

- Dynamic Promotions types 11 "Punch Card - Buy 'n' over time" and 13 "Buy 'n' of 'x' for $t" formerly only allowed a quantity of 24 and 99 respectively. They both now allow a quantity up to 9999.

- The limit for adding a payment in Point of Sale ROA (Start Menu "Payment/ROA") has been increased to 30. The previous limit was 10.

- The following enhancements have been made to give POS clerks more accurate balance information for a customer's charge account:

  - The RSM report screen has the new option B "Always Update Statement Balance and Statement Discount". Even if a monthly statement does not print for a customer because the customer has a zero balance or a credit balance, using Option B will make sure the customer's Statement Balance and Statement Discount are set to zero so the old balance is cleared out.

  - The RSM report screen has the new option 1 "Do Not Allow Terms Discount on Past Due Accounts". Existing option X's description has been revised to "Allow Terms Discount on Past Due Accounts But Do Not Print It". The terms discount is calculated for a past due account but it does not print on the statement.

  - Customer Detail dialog has the new field "Balance Due". This is the dialog that displays in POS after you have selected the customer.

    - If customer balance information displays in this dialog (option 360 is not N) the new "Balance Due" amount has been added to this dialog (below Running Balance). The value of this new field is determined by the setting of the new Option 1693 "Calculation for POS ROA Balance Due (or DUE) field", and its label is entered in the new Option 1695 "User-defined label for POS ROA Balance Due field". You will see this new Balance Due field in all 3 variations of the

Customer Detail dialog which has balance information (based on the 3 choices in option 9059).

- Four new E4W Options have been added to improve POS customer balance information:

  1. Option 1692 "Format of POS ROA customer balance information". This option supports all domains, defaulting to "by System". Set this option to "Simple" to get a clearer presentation of the balance information at the bottom of the Point of Sale ROA screen. A new second line of balances for 'All jobs' will display if the ROA's customer is a main account with jobs, or is a job.

  2. Option 1693 "Calculation for POS ROA Balance Due (or DUE) field". This option's domain is System. Set this option to N and option 1695 "Ignore Statement Disc in Balance Due after Terms Disc Date" to Y for POS to display Balance Due based on the last statement balance inclusive of the statement terms discount if it is still eligible. If you want the Balance Due to reflect activity (charges/payments) made since the last statement, then you will want to set this option to B and 1695 to Y (make sure you are running a daily RAG with options FR).

  3. Option 1696 "User defined label for POS ROA Balance Due field". This option's domain is System. Enter an alternate description for the customer's Balance Due field which displays at the bottom of the POS ROA posting screen. It also displays in the Customer Detail dialog when option 360 "Display Customer Balances in the POS Customer Details dialog? (Y/N/R)" is <u>not</u> N.

  4. Option 1695 "Ignore Statement Disc in Balance Due after Terms Disc Date". This option's domain is System. This option applies to customer accounts which can take advantage of a terms discount if they pay off their statement balance by a specific date within the month.

- Field labels in the Customer Detail Information dialogs have been modified for consistency and accuracy. When <Display> is pressed in the Customer Viewer or POS Header, the following fields will be affected:

  - "Current Balance" has been renamed to "Running Balance"

  - The total running balance for accounts "Main Account/Jobs Balance" has been renamed to "All Jobs Running Balance".

- If you try to invoice an order in which the deposit exceeded the order amount, you must first refund the deposit and then invoice the order. Option 1478 "Automatically invoice order after refunding excess deposit" allows you to automatically refund the deposit at the time the order is invoiced.

  - Set this option to Yes if you want the system to automatically invoice the order once the deposit has been refunded. Set this option to Prompt (P or X) if you want your clerk to be asked if they want to automatically invoice the order once the deposit has been refunded.

  - Set this option to No if you do not want the system to automatically invoice the order once the deposit has been refunded. In this case the clerk will need to refund the deposit and then recall the order to invoice it.

  - If Option 5093 "Terminal used when updating POS Orders from outside of POS" is not already configured with a terminal, you must enter a terminal the system will use to automatically invoice the order once the deposit has been refunded. Make sure this terminal's signed-on user and store have full POS security.

- When posting a Bill of Materials in Point of Sale you may now use a template SKU if adding a component that is not in your inventory.

  - In the Point of Sale Bill of Materials posting screen press <Add> and enter the template SKU. This will bring up the "Add SKU" dialog for the clerk.

  - Fill out the item information needed to add this non-stock item to inventory.

  - Once <Enter> is pressed, the system will add the special order SKU to inventory and then to the current BOM being sold on this transaction with the quantity, cost, and price entered in the Add SKU

dialog.

- Special Order Option 114 "Adv S/O Receiving - Update POS Order Cost" now applies to Bill of Materials so the Customer Order can reflect an accurate Cost of Goods Sold. If a Bill of Materials component is sourced to a Purchase Order via the Buyer's List and the PO is finalized, a cost change made to that item on the PO will update the component on the POS Order with the new cost.

- Multi-store customers who are using Customer Order Management (COM) to source items on customer orders to transfers can maintain the item link to the order when using the Consolidated Transfers function. This allows the system to update the backorder quantity on the customer's order once the consolidated transfer has shipped.

- If you have option 5111 "Use Ship Via's in Order Entry" enabled, you can use the Go To Menu (option S) in Customer Maintenance (MCR) to assign a <u>default</u> Ship Via code in Multiple Ship To Maintenance.

- You may now enter up to 8 bin ranges for In Store Gift Cards plus a description for each (up to 30 characters) in Option Configuration's Misc Menu "Maintain Custom Card Bin Ranges". Currently the description is only for your reference.

Loyalty Enhancements

- If you do not want to issue a physical loyalty ID and/or dollar rewards card, two new options will enable you to assign these card types when adding a customer via Customer QuickAdd. These options can be used together or separately and apply when using Maintain Customer Accounts (MCR) loyalty hyperlink, MCR GoTo 9, "Customer QuickAdd", or Point of Sale Customer QuickAdd (header Misc Menu 8).

  - Option 5016 "Auto-assign Loyalty ID in Customer QuickAdd". Set to A for auto-assign or B for manual entry.

  - Option 1700 "Auto-assign Loyalty Dollars ID in Customer QuickAdd". Set to A for auto-assign or B for manual entry.

  - When set to B, press <Misc> in the QuickAdd dialog and select the appropriate of either "Enter card's Loyalty ID" or "Enter card's Loyalty Dollars ID".

  - If the existing customer's Loyalty ID is blank and option 5016 is Yes, pressing <Change> will automatically assign a Loyalty ID. The same applies to Loyalty Dollars ID if option 1700 is Yes.

    - *Note*: If you want to clear out an existing customer's Loyalty ID or Loyalty Dollars ID this can be done in MCR.

- New Option 9867 "Loyalty subscription renewal on system" can be set to Yes in MSY if you would like to charge your customers an annual fee to participate in your local loyalty program.

- The new Loyalty Summary window in Point of Sale gives a summary of the customer's loyalty status including their reward history.

  - Access this window by first selecting H "Enter Loyalty#/View Loyalty Summary" in Point of Sale's Misc Menu and then clicking on the Summary button.

  - The loyalty summary window displays the customer's name, address, phone number (dependent on option 9198), email (dependent on option 9199), loyalty level (dependent on option 9996), loyalty dollars and reward/redemption history (dependent on options 9067 & 9068 both being > 0), points information (dependent on option 9061), and Frequent Buyer promotion status (dependent on option 9811 "Punch Card Dynamic Promotions on System"=Yes)

  - You may also include user-defined text at the top of the window that can be used to answer questions about the information in this window, or advertise an upcoming loyalty promotion. Enter the desired text in Option Configuration's Misc Menu Z "Maintain user-defined notes/text", then enter the code you assigned in Option 1702 "Note/Text to display in Loyalty Summary".

- Improvements have been made to the loyalty information which displays in the Customer Detail dialog in Point Of Sale.

  - The labels used for points information have been changed to make them more descriptive and less confusing.

    - Points (PTD) => Points Last Calculated

    - Points (YTD) => Points Current Balance

    - Points $ => Points Future $'s when converted

  - New E4W Option 1698 "Display Loyalty Points in Customer Details window?". Choices are:

    - Yes - displays these lines: Last Calculated, Current Balance and Future $'s when converted

    - Points – which displays these lines: Last Calculated and Current Balance

    - No – when no these 3 lines do not appear

  - Use New E4W Option 1699 "Label to use for Loyalty Dollars" to define the label you would like for this reward. The amount of loyalty dollars always displays if you convert points to Loyalty $'s on a stored card.

  - Eagle for Windows now only displays the "Loyalty Dollars" line if you issue your rewards as dollars added to a stored In-Store Gift Card. If your reward is something other than a store card (such as a dynamic coupon) you'll no longer confuse your clerks with this line.

Windows Inventory Enhancements

- The following fields have been added to Inventory Import. These fields are updated directly, meaning they do not get processed with Flexible Inventory Load (FIL) and the Inventory Load Report (RFL).

  - Prime Vendor Part Number (immediate update) – on IMU's Vendor tab this field is the Vendor Part # in the Prime column.

  - Mfg Vendor Part Number (immediate update) - on IMU's Vendor tab this field is the Vendor Part # in the Manufacturing column.

- New E4W Option 5393 "Keep Bill of Materials (BOM) the same in all stores?" allows you to make changes to a Bill of Materials and have the system update all stores with the same data. Before enabling this option, please review the limitations documented in this option's extended description. If you already have BOMs enabled in multiple stores, you must run the "Rebuild Bill-of-Materials" utility after setting this option to Yes. Instructions on how to run this utility also exist in the extended description of option 5393.

- A new viewer for Multiple Selling Units has been added which requires the new security bit 1128 "View Multiple Selling Units (MSU)". Launch this viewer by clicking on the IMU Code tab's Multiple Selling Unit hyperlink, use the Go To Menu "Maintain Multiple Selling Unit Codes", or enter "MSU" in the Eagle Browser's launch bar to see all MSU Codes and their selling units. The new security bit 1127 "Add/Change/Delete Multiple Selling Units (MSU)" controls the use of <Add>, <Change>, and <Delete> as well as being able to use these Misc Menu functions which allow you to quickly change that field for all checked rows:

  - Change Selling Unit Description

  - Change Quantity Factor

  - Change Price Factor

  - Change Specific Price

Windows Purchasing & Receiving Enhancements

- In the Suggested Orders (RSO) report there is a new Order Calc option R "Use Negative QOO in Order Calculation". In the past a negative QOO was always considered zero, and this new option allows you to use a negative QOO in the suggested order calculation (as long as you are not using Option Q "Do Not use QOO in order calculation"). Below is an example scenario in which you may want to use this option:

    - You are required to receive a product even if shorted or damaged and then append it to a credit PO until you get credit. (The issue would be under the case where an item had one on hand, 5 on order and an order point of 5.) The PO is received, you are shorted these five, but they must be received and placed on a credit PO. Therefore the item ends up with 6 on hand, -5 on order, and still has an OP of 5. Using the quantity on order of -5 as a zero would cause the item not to be ordered, but you actually do need to order 5 to cover the short. When option R is used the -5 would be used in the calculation an 5 would be ordered.

- Purchasing & Receiving (MPO) now supports "PO Line Level Discounts":

    - MPO's posting screen now contains a hyperlink that allows the user to discount individual detail lines of a purchase order. To discount an item, enter the item in the posting area and click on the Cost Stk hyperlink, or use Misc Menu "Enter Item Discount Percent". You can enter a cost discount when adding an item to the PO or changing an item already on the PO. *Note:* On a change the discount entered is always applied to the original cost. This is not intended for 'chain discounts'.

        - When this window is displayed, enter the discount percent (or dollars off) and click <Calculate> to see the new discounted cost. You will also see the actual dollars off if a percent was entered, or the percent discount if a "Dollars Off" was entered. Click <OK> to post that discounted cost to the PO.

- The Buyer's List has these new columns which are initially hidden and need to be selected in 'Select Columns to View' in order to display.

    - Class #

    - Fineline #

    - All 20 item user codes Code1 thru CodeD4

- Printing, Emailing, and Faxing a purchase order with reports RPO and RRB now supports the use of a custom enhanced form similar to forms used for POS invoices. You can use either plain paper or pre-printed forms which allows you to customize your purchase order and/or receiver to meet your specific business requirements. To purchase a custom Enhanced Form for Purchase Orders or Receivers, contact Business Products at 1-800-837-4273.

Windows Accounts Receivable Enhancements

- If a monthly statement doesn't print for a customer because they have a zero balance or a credit balance, new option B "Always Update Statement Balance and Statement Discount" will make sure the balance and discount are set to zero so the old balance is erased.

- The Frequent Buyer Punch Cards are a special type of promotion only available to customers participating in your loyalty program (your own local loyalty or your national account's loyalty). There are 2 types of punch cards available in MDP: Type 11 "Buy 'n' over time" and type 12 "Spend $t over time" where the reward is 'one free', one at a $ discount, one at a % discount, or a coupon (which you create in MDC). The Punch Cards Viewer (PUNCH) keeps track of the consumer's punches and when the punches have been converted to the reward.

    - In the Punch viewer you can now 'add a punch to' or 'subtract a punch from' a customer for a specific punch card promotion. This requires security bit 1124 "Ability to make a Punch Card Adjustment".

- Use the <Add> button on the toolbar to display the 'Add Punch Card Adjustment' dialog. The Customer and Promotion ID fields are carried in from the highlighted row, or they can be manually entered. The Promotion ID combo will list only Punch promotions (DP types 11 and 12) that exist in Modify Dynamic Promotions (MDP). Select either Credit to add a punch, or Debit to subtract a punch. Once you select <OK> based on the type of promotion you will be asked to enter the Quantity (if type 11) or the $ Amount (if type 12) you want to add or subtract.

Accounts Payable/General Ledger Enhancements

- A number of A/P and G/L reports required more than one security bit, one of which was often a bit that made no sense for that report. These reports now only require one single security bit - the Level 26 Advance has logic to ensure the 'surviving' security bit is set appropriately:

  - RGJG – corrected the unrelated bit 447 "Allow changing of how options are kept" incorrectly being used to control the use of <RUN> in RGJG. Now RGJG only requires bit 374 "Allow Post G/L Recurring Journal Transactions Report (RGJG) " for both accessing and running this report. The advance will set bit 374 to Yes if bit 447 is yes.

  - RGFS – corrected unrelated bit 381 "Allow Run G/L Statement Specification Listing Report (RGST)" incorrectly being used to control the use of <RUN> in RGFS. Now RGFS only requires bit 512 "Allow Run G/L Financial Statements Report (RGFS) " for both accessing and running this report. The advance will set bit 512 to Yes if bit 381 is yes.

  - RGST – corrected unrelated bit 449 "RF - Change RF shelf manager retail price information" incorrectly being used to control the use of <RUN> in RGST. Now RGST only requires bit 381 "Allow Run G/L Statement Specification Listing Report (RGST) " for both accessing and running this report. The advance will set bit 381 to Yes if bit 449 is yes.

  - RGGG – corrected unrelated bit 440 "Allow IFA Limited Change in MCR" incorrectly being used to control the use of <RUN> in RGGG. Now RGGG only requires bit 373 "Allow Post G/L General Journal Transactions (RGGG)" for both accessing and running this report. The advance will set bit 373 to Yes if bit 440 is yes.

  - RAAJ – corrected two bits, 1081 and 346, "Allow A/P invoice adjustments report (RAAJ)" being used to control the use of RAAJ. Now RAAJ only requires bit 346 "Allow A/P invoice adjustments report (RAAJ)" for both accessing and running this report. The advance will set bit 346 to Yes if bit 1081 is yes.

  - RAMP – corrected two bits, 418 and 472, "Allow Post A/P Manual Payments (RAMP)" being used to control the use of RAMP. Now RAMP only requires bit 472 "Allow Post A/P Manual Payments (RAMP)" for both accessing and running this report. The advance will set bit 472 to Yes if bit 418 is yes.

  - RARV – corrected two bits, 357 and 511, "Allow Post A/P Recurring Vouchers (RARV)" being used to control the use of RARV. Now RARV only requires bit 511 "Allow Post A/P Recurring Vouchers (RARV)" for both accessing and running this report. The advance will set bit 511 to Yes if bit 357 is yes.

Weblinks Enhancements

Weblinks were added on Release 25 as a feature of Eagle N Series. They are URL's that can be tied to websites, images, PDF files, etc. Weblinks can be associated with items, customers, and vendors. The following enhancements have been made to Weblinks on Release 26:

- Often times, businesses already have a collection of usable images stored locally, and they would like to use those images in Weblinks. Weblinks now have the ability to link to images that are not stored on the web, but instead are stored on a shared directory in your network. Using the "file://" prefix, Weblinks can now link to images (".jpg", ".png" or ".gif") that are stored on a shared directory.

- Item, Customer and Vendor specific Weblinks are now managed in a viewer instead of using a one-at-a-

time setup dialog. This makes setting up Weblinks quicker and easier since now you can see Weblinks across all items, customers, stores, or vendors.

- Add a weblink - click <Add>.

- Change a weblink for a specific line - highlight that line and click <Change>.

- Remove a weblink - highlight that line and click <Delete>.

- You may now add up to 5 weblinks for a single Item, Customer,or Vendor.

Miscellaneous Enhancements

- Viewers have been added to Eagle Browser:

  - These viewers have been added to the Sales Review Menu:

    - POS Order Viewer (ORD) – requires existing bit 75 "Allow access to POS".

    - POS Order Detail Viewer (ODE) – also requires bit 75

    - POS Order Changes Viewer (OCL) – requires existing bit 787 "Access viewer of Customer Order Changes"

    - Service Order Viewer (SOV) – requires existing bit 911 "Allow Service Orders in POS"

  - These viewers have been added to the Purchasing & Receiving Menu:

    - Purchase Order Viewer (POV), requires existing bit 211 "View purchase orders"

    - Purchase Order Detail Viewer (POD), also requires bit 211

  - This viewer has been added to the Inventory/Setup and Maintenance menu:

    - Multiple Selling Units Viewer (MSU), bit is 1128 "View Multiple Selling Units (MSU)"

- Eagle Browser "My Reports" (multi-store customers), which shows the current signed on user's a list of their 12 most recent reports now includes the Store column that shows the store for which the report was run. If the report was run for 'All Stores' it will show blank in the Store column and if it was run for C (Consolidated), or for a store group, it will show "C" as the Store.

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