

Eagle Loyalty Setup

Epicor Eagle Release 26.1 contains some great new features and options for growing your business.

In this course we will review some new functionality within Point of Sale, Inventory, and Purchasing and Receiving,

We will also see innovations in Accounts Payable and General Ledger, along with some Pharmacy enhancements and a few other miscellaneous items.

Be sure to provide Epicor with your feedback on this course by using the new link located in the upper right corner.

All documentation supporting Eagle Software Release 26.1 is available on the Course Detail page.

Simply click any link to open the PDF file.

From there it can be printed or saved.

Within Point of Sale, Dynamic Promotions Types 7 and 8 now have the ability to calculate a prorated return price for each item that contributed to the transaction total.

Setting Option 1732 to yes will calculate the return price of an item based on its percentage of the original transaction total.

With Eagle Software Release 26.1, a credit SKU issued with Dynamic Promotions type 4, 5, 6, or 13, will have a 'DP Return Price' calculated and stored in QuickRecall.

If the item is returned and validated to the original sale, the DP Return Price from QuickRecall is the amount the customer will be refunded.

Now your customers only receive credit for the actual amount they originally paid.

The Text Messaging feature released previously just got even better!

3 new options allow the user to define their own 'end of text' message for Rainchecks, Special Orders, and Service Orders.

Texts for Rain Check items, those sent from the Customer Viewer, and messages sent using the 'Send Text' button will now be recorded to the customer's activity notes.

The 'SMS Text' button is easily accessible within MCR, ROA, MOI, and CANV

Texts that are specific to a POS transaction are recorded to that transaction's Document Notes.

The POS Email Receipt dialog enhancement prompts clerks to inquire if customers would like to have their receipts emailed to them.

They can then take one of three actions.

Enter the email address and their account will be flagged to transmit all future receipts.

Press Escape or Cancel to decline this time, but ask again the next time they shop.

Or they can choose Never to have the flag set to not receive receipts by email.

You can Print Location Codes on a Loading Ticket 40-column Receipt.

Set this option to Yes to print up to 6 locations.

This can apply to not only the pickup receipt but also the return receipt.

Option ID 8414 "Prompt for return reason?" has a new choice, 'D' "Defect Description too".

This will require a clerk to enter a text description when an item is returned or exchanged defective.

The description entered will print on the defective returns receipt when Option ID 9499 is set to Yes.

The line item display on the Ingenico PIN Pad as well as the Consumer Digital Display monitor has the ability to redisplay the adjusted pricing. Set Option ID 1494 to 'R'.

Additionally, voiding or changing a line on the transaction will now indicate the item has been 'Voided'.

Eagle Local Loyalty users who use the Subscription Renewal Option 9867, will now see the customer's subscription expiration date in the Loyalty Summary dialog.

If you have your own local loyalty program, you can set the new Option ID 1723 "Prompt for Loyalty Account on PIN Pad" to Yes.

This will give your loyalty customers the ability to link the transaction to their loyalty account by entering their phone number on the PIN Pad.

26.1 includes an enhancement to the Credit Authorization process.

Setting Option 1728 to Yes triggers the verification of manually entered authorization codes.

These codes will need conform to specific rules when an on-line POS transaction approval is forced or when taking a credit card payment in off-line Point of Sale.

The codes must be six characters in length and only consist of characters 0-9 and/or A-Z.

If the code does not conform to this format, the clerk will receive a warning and be required to enter a string that meets these requirements.

And finally, new Options ID 1738 gives you the ability to indicate which Point of Sale messages your clerk can dismiss.

They will be required to enter the random character shown on the screen to move past the message and continue with the transaction.

Epicor Eagle's latest software release includes a few new features to help manage your inventory.

The Item Bin Labels Report, or RBL, now offers a 'From/To Date Created' criteria to further refine the output.

And the Inventory Import tool has quite a few new fields that are updated directly without the need to run FIL or RFL.

These include the Decimal Quantity Allowed, POS No Charge SKU, Special Order SKU, Sellable in this Store, the Hazardous Code and Signature Required Note.

There have been a few features added to the Advanced Receiving function.

On Eagle Software Release 26.1 and higher you can utilize the new Miscellaneous Menu choice “Scanned PO Documents” to view the scanned documents related to the Purchase Order currently displayed in MRV.

Multi-Store users have access to new Option ID 9476.

This can be set to update to the value entered in the ‘Billing Store’ field for all stores at once.

Option ID 8958 “Lookups forced to” has a new choice, number 6, which dictates that contacts are stored in all upper case letters.

This will prevent accounts from listing the same name more than once as in this example:

After pressing ‘Change’ a utility will automatically run and convert all existing contact names to upper case.

Users can now update these fields on a manually added journal transaction:

Once the transaction has been added, simply click the field in the grid and enter the new value.

Once all changes have been made, press the ‘Change’ button to apply them.

Epicor Eagle Software release 26.1 has another new Options ID, 1731.

When this option is set to Yes, APP will create the Accounts Payable voucher with the User ID of the person who ran the RRP report.

For example, if user MIKE ran RRP with option F, the AP voucher created by APP will have the User ID set to MIKE.

To increase control within the Pharmacy program, this release offers several new security bits.

1135 and 1136 can be set to require a manager’s override to clear pharmacy adjudication messages.

And 1137 and 1138 can oversee a user's ability to cancel or submit an incomplete controlled substance tracking ID on several pharmacy interfaces.

Weblinks are URL's that can be attached to individual Eagle Business Objects.

The Inventory Viewer has a new column (Weblink+) which will indicate if item has one or more links.

Clicking on the link will display the weblink(s) for that item.

You can also click on the toolbar's Weblink button to display the URL in your browser.

The Customer Viewer and the Vendor Viewer also have the new Weblink+ column.

Clicking here will display the URL address or you can use the Weblink button.

Weblinks can now be added and maintained right in their applicable viewer.

In the Inventory Viewer use the new Miscellaneous Menu choice "Add Weblink" or use "Maintain Item Weblinks" to access the Item Weblink Maintenance Viewer.

The same two comparable functions are available in the Customer and Vendor Viewers.

There have been several Co-Op specific enhancements added to Epicor Eagle Release 26.1.

If you would like more information, please contact your Co-Operative Representative or access your internal website for details.

We would like to Thank you for watching the 'What's New' Release 26.1 Training on Demand course.

This software contains some amazing new features and settings designed to help you Grow Your Business.

You should receive your copy of the software in about 2 to 3 weeks.

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