Eagle Loyalty Options and Security Checklist

You will need to review the following Eagle Options settings prior to utilizing Eagle Loyalty. These options require a password and must be enabled by the Epicor Licensing Department. Please contact your Customer Account Manager for assistance.

ID	Description	Current Value	Edit?
1182	Loyalty Program	Local Loyalty	Pwd
9061	Loyalty Points on System	Yes	Pwd
9070	In-Store gift card on System	Yes	Pwd
9867	Loyalty subscription renewal on system	Yes	Pwd
9871	Dynamic Coupons on System	Yes	Pwd

The following options also need to be reviewed and set prior to beginning an Eagle Loyalty program. Use this checklist to make sure you address each ID.

ID	Sub	Description	Verified
100	POS	Vendor Code	
110	POS	Next Cash Customer Number	
120	POS	Next House Customer Number	
130	POS	Coupon SKU	
140	POS	POS Link Window	
150	POS	Link to Cash Customer	
1494	POS	Enable redisplay of adjusted pricing on checkout's consumer display	
1634	POS	Print Loyalty Points New Balance on Receipts	
1700	A/R	Auto-assign Loyalty Dollars ID in Customer QuickAdd	
1701	A/R	ISGC bin range to use for auto-assigned Loyalty Dollars ID	
3509	A/R	Allow access to customer contact fields in Customer Maintenance	
3530	A/R	Customer Loyalty - Use code position to identify non-asterisk accounts	
3531	A/R	Customer Loyalty - Code value that identifies non-asterisk accounts	
3533	A/R	Include the loyalty number in the alternate customer ID lookup (=)?	
3534	A/R	Inactive days to purge Loyalty Dollars	
3541	POS	Email format for cash/loyalty customers	
3565	A/R	Keep customer credit cards on system	
5010	POS	Change customer when entering loyalty # at end of transaction	
5011	POS	Prompt for loyalty ID at 'end' should display when?	
5012	POS	Allow loyalty account in all stores even if "Cross Store Charges" = No	

ID	Sub	Description	Verified
5013	A/R	Local Loyalty Auto-Assign Starting ID	
5014	A/R	Local Loyalty Auto-Assign Ending ID	
5015	POS	Local Loyalty - allow 11 or 12 digit loyalty # for customer lookup	
5432	POS	Allow quick add of customers/jobs in POS	
8705	POS	Allow cash back if loyalty coupon(s) exceed purchases	
9062	A/R	Sales value to use for Loyalty Points calculation	
9063	A/R	Multiplier to use for Loyalty Points calculation	
9064	A/R	Print Loyalty Points on Statements	
9065	A/R	Label to use for Loyalty Points	
9066	POS	Print Loyalty Points Previous Balance on receipts	
9067	A/R	# of Loyalty Points to Convert to Loyalty Dollars	
9068	A/R	$'s added to Loyalty Dollars when converting points to dollars	
9069	POS	Calculate Loyalty Points using Department Sales Values	
9074	POS	Check the balance of stored In-Store Gift Card	
9092	POS	Print Loyalty Points Earned from current transaction on the cash receipt	
9783	POS	Ask cash/loyalty customers if they want receipts emailed?	
9868	POS	Loyalty subscription SKU	
9869	POS	Prior days to warn of loyalty account expiration	
9894	G/L	Enable separate GL accounts for In-Store Gift Cards	
9996	POS	Display Loyalty Level in POS	

Review the following Security Bits and assign according to your defined Security Roles.

Security Bit	Capability	Verified
10	View Customer Loyalty constants	
11	Change Customer Loyalty constants	
17	View the Accounts Receivable (A/R) sub-menu	
314	View Customer Loyalty information (ARCM, TVR, CLI)	
315	Add/Change/Delete Customer Loyalty information (ARCM, TVR, CLI)	
688	(MO) Access customer credit card list	
689	View full customer credit card number	
690	Access to customer credit card maintenance (encrypted mode)	
691	View full customer credit card number (decrypted mode)	
692	Add, change, delete customer credit card number	
756	Allow Loyalty by Clerk Report	
854	Allow Access to Loyalty Points Calculation Report CALCPNT	
881	Access to the Loyalty Points Conversion and Gift Card Import	
900	Access to the Set Loyalty Dollars to Zero utility	

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