What's New on Release 27.1

Welcome to Eagle Release 27.1 (server Level 39). 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 blue underlined text.

Note: It is highly recommended that Eagle Analytics users upgrade to Compass 14.0.0.3535 or higher when upgrading to Eagle Release 27.1.

eConnect 3 users – if you use eConnect 3 to install software on your clients, they must be on version 3.371 or higher before you can do the upgrade to Release 27.1. If you receive patches automatically (Vista Bedcheck) and are on Release 27, 26.1, 26 or Release 25.1, this upgrade has occurred automatically via Patch. Confirm your clients are on this version of eConnect and re-establish the PC that will be your eConnect Manager Console. If you do NOT receive patches automatically or are NOT on Release 27, 26.1, 26 or 25.1, install the eConnect.msi on the Release 27.1 Eagle Client Applications CD. Access the eConnect 3 User Guide at http://www.epicor.com/eaglerelease/ .

FFL Compliance Manager Integration Enhancements

- The FFL Compliance Manager (FFLCM) is a stand-alone software solution for FFLs of all sizes and is available to Eagle and non-Eagle users. You can simplify your Serial Number Tracking of firearms, A&D / Bound Book reporting, and ATF compliance. You can easily acquire firearms, dispose firearms, run reports, simplify the work required for an ATF audit, and perform Trace Requests. In addition, the FFL Compliance Manager Agent automates local downloads of acquisition and disposition records in compliance with 2016-1.

- FFL Compliance Manager integrates with the Eagle POS system. This integration allows business workflows to be seamless, less time consuming, and provide for a better customer experience. Release 27.1 improves this integration by adding the ability for Eagle to special order a firearm, place a firearm on a Layaway, and transfer firearms from one store's bound book to another store's bound book. Contact your account manager for more details about Epicor FFL Compliance Manager.

Release 27.1 Integration Enhancements

- Special Ordering a Firearm - You can now use existing special order capabilities to post a firearm on a special order (or order) and automatically create a purchase order (PO). Once the firearm has been received, recall the customer's order and select it from the list of firearms available for sale.

- Creating a Layaway for a Firearm - You can now use existing POS layaway functionality to place a firearm on a layaway. During the final payment select the appropriate firearm from the list of firearms available for sale.

- Transferring Firearms between Stores (between bound books) - You can now use existing POS transfer functionality to transfer a firearm(s) from one store to another store.

  Notes:

  - Because the firearm won't exist yet in FFLCM, posting the firearm on a Special Order, Layaway, or Transfer will not present the list of 'firearms available for sale' to the clerk, and the clerk will instead select TBD (To Be Determined) in the selection dialog.
  - For the above new capabilities to function properly option 1788 "Serial # required before invoicing" must be set to Yes, and security bit 1143 "(MO) Invoice a POS transaction with serialized item(s) without a serial #" should be set to No.
  - Refer to the corresponding online help topics for more details.

Range Management Integration

- Range Management is a stand-alone software solution available to Eagle and non-Eagle users. An integration for Eagle POS is completed in Release 27. A couple of enhancements for Range Management integration have been made on Release 27.1:
- New Security Bit 1144 "Ability to take a deposit for On Range transaction" controls the ability to take a deposit on a transaction which has a shooter / party assigned to a lane. When set to Yes, totaling an On Range transaction will allow the clerk to select <Deposit> in the "On Range Lane" dialog. Once the deposit is tendered the transaction will be suspended.

  Note: Applies when option 1763 "Range Management Integration on System" is set to Yes.

- New Option 1791 "Range Management Waiting List Allowed" allows you to place a party on a Waiting List in Range Management when the type of lane they want has no availability. When set to N, a party can only be placed on an available range lane.

  Notes:

  - Eagle POS can NOT be used to move a party from the Waiting List to an available lane. This is done in the Range Management application.
  - Taking a party 'off range' in Eagle transaction removes them from assigned lanes as well as from any waiting lists.

Serial Number Tracking Enhancements

A number of enhancements have been made on Release 27.1 to improve the accuracy of Serial Number Tracking functionality and give you controls to ensure the following:

  - accurate serial numbers are captured during Receiving

    - serialized inventory's available numbers accurately represent the number of units on hand
    - selling a serialized item is done using the trackable serial number of the unit being sold
    - you can match a given serial number to its receiver, the invoice and customer it was sold to, the trade-in SKU and value if taken in for trade-in, the original purchase for returns, and if taken in for repair the customer and repair order
    - only employees with the proper security can add, change, and delete serial numbers.

  Note: With these improvements for best accuracy we recommend setting security bit 655 "Allow adding serial #'s during Receiving or at Point-Of-Sale" to No for your Point-of-Sale clerks.

The following enhancement have been made to Serial Number Tracking:

- Purchasing & Receiving – The existing functionality to add each unit's serial number during receiving now records PO# and Line# on the unit's serial number. You can see the PO#/Line# the serial number was received on in IMU's Serial Number Maintenance as well as in the new Serial Number Viewer.
- New Option 1789 "Allow duplicate serial numbers in Inventory?" allows you to have the same serial number in Eagle more than once if it is assigned to a different SKU. Previously a serial number had to be unique. Set this option to Yes if:
    - You encounter the same serial number being assigned to different items. Manufactures do not have any restrictions when assigning serial numbers, so the same serial number can exist on completely different items.
    - You sell serialized items which you later take in for trade-in. The serial number will need to exist on both the original SKU as well as on the trade-in SKU.

    Note: Refer to Option 8716 "Prefix of template SKU used for trade-ins" and the online help for details on Eagle's existing Trade-In feature.
- New Option 1787 "Allow system to auto generate a Serial # if one does not exist" set to Yes allows you to have the system generate a unique serial number for tracking purposes when an item has no serial number. It applies both to receiving serialized items in MPO and selling serialized items in POS. It also applies when creating a Service Order for an item which has no serial number and option 9242=S to use serial numbers to identify the item being repaired.
- New Option 1788 "Serial # required before invoicing" set to Yes and security bit 1143 "(MO) Invoice a POS transaction with serialized item(s) without a serial #" set to No, allows you to enforce that each serialized item sold in POS has a serial number entered before the sale can be completed. It applies to selling, returning, ordering, special ordering, and transferring serialized items. If the serial number is not known at the time of posting, select "TBD". Then once it is known use line item change and Menu E "Assign Serial #" to enter it before invoicing.
- QuickRecall Viewer – The Change Serial Number dialog of the QuickRecall Viewer now allows you to indicate, at the time of changing the serial number, whether the serial number being replaced will be available for a future sale (Requires security bit 584 "Change Serial Number in Quick Recall for Tally-S items).

Notes:

- To change the serial number of an item on an archived transaction, display the transaction, click the line with the serial number, click Misc, and select Change Serial Number.
- If the serial number of an item is not available before it is invoiced, you can use “NSN (No Serial Number)” to have the system automatically generate a serial number so that the sale can be completed.

- New security bits 1003 “Ability to change serial numbers” and 1004 “Ability to delete serial numbers” and existing bits 219 "View and add serial numbers” and 231 “Allow UPC/alternate part number report (RAP)” are available to ensure only employees with the proper security can add, change, and delete serial numbers.

- Serial Number Viewer (SNV) – This is a new viewer which displays serial numbers for a specific SKU or for all SKUs based on their status: Available, Sold, or All. For multi-store customers with Option 8990 “Require Store when adding Serial #'s” set to Yes, you can see the serial numbers of a specific store or all stores.

Note: Access to this viewer requires security bit 219 “View and add serial numbers”.

- Serial Number Import – You can now update existing serial numbers during the import. Use the change capability to add the Store the serial number (the unit) exists in, or to enter the Location of the unit in the Reference field.

- Windows Labels – If you are entering each unit's serial number during receiving, you can now print a label for each unit received in Purchasing & Receiving (MPO).

Note: Set Option 5818 “Default price label used for printing from Serial # Maintenance” to the required label format when printing labels for serial numbers entered in Receiving.

To print a label for each serial number received:

1. Once you enter the serial numbers of the units received in MPO, select the check boxes next to the serialized SKUs for which you want to print labels.
2. Click the <Labels> button and select 1 of the first 3 choices:

- Print Now - displays the “Label Print Options” dialog. Set Number of Labels to “Each Serial # received” and click <OK>. In the “Print Labels” dialog the Label Format defaults to the new choice “Serial # Label per Option 5818”. Click <OK> to print a label for each serial number received to the printer entered in the Printer field.
- Add to Label Manager - displays the “Save to Label Manager” dialog. Set Number of Labels to “Each Serial # received” and click <OK>. One record for each SKU/Serial # received will be added to the Label Manager from where you can print the labels.
- Save to new batch - displays the “Save to Batch Options” dialog. Set Number of Labels to “Each Serial # received”, enter the description of the batch and click <OK>. One record for each SKU/Serial # received will be added to the batch that you can import and print from the Label Manager.

For firearms you can print a trigger tag using one of these new formats, or create your own:

- Trigger Tag Avery 22802
- Trigger Tag Avery 22802 UPC
- Trigger Tag Avery 22802 UPC SERIAL

- Physical Inventory by Serial Number – Set new Option 3074 “Physical Inventory - Count serialized items by Serial Number” to Yes if you want cycle counts and inventory adjustments in the Physical Inventory subsystem to be done by serial number instead of by a unit count.

POS Enhancements

- Contactless Payments (Option 1347=Y) – If Option 9537 “Returns Validation with Original Receipt or Credit Card” is set to B (both) or C (credit card), the PIN Pad’s contactless reader is now enabled after the clerk selects “Return with Bank Card” for applying a return. The PIN Pad’s “Please swipe card” screen now allows contactless as well as swipe and insert.

- Contactless Payments (Option 1347=Y) – EMV Contactless is now available. To enable this functionality, in Device Configuration double-click the Credit/Debit Pad row, then select <Options>, and in the PIN Pad Options set Contactless Mode to E (EMV Contactless).

- Secure Card Entry – With this release the manual entry of credit card numbers is more secure for Point to Point Encryption, aka Transactional Security (Option 1345=Y). POS stations now have the ability to launch a secure card entry dialog that communicates directly to the Epicor Gateway in order to retrieve a token for use in card processing functions. This applies to bankcard entry on the POS Totals screen, stored credit card entry in Customer Maintenance (MCR’s Go To Menu A), and when adding a payment transaction in Credit Authorization Detail Viewer (CARD).

- Manual Card Entry from PIN Pad - New Totals Menu selection Y “Allow manual card entry on PIN pad” has been added to the POS Totals screen. This new functionality allows on-demand card entry on the station’s PIN pad that can only be initiated by a Cashier with proper security (bit 577 “(MO) Manually enter a bankcard number”) to protect against misuse.

- Phone Number Lookup on PIN Pad - New Option 1790 “Mask address displayed on PIN Pad for account confirmation” set to Yes protects the customers' privacy by masking their street address if options 1723 “Prompt for Loyalty Account on PIN Pad” is set to Yes and 1724 "Loyalty Account lookup confirmation on PIN Pad" is set to S (Street Address).

- Manager Override Viewer (MOV) – This is a new viewer available from the Eagle Browser, type MOV in the Launch bar, and click Enter (alternatively, you can click the Sales Review Menu then Manager Override Viewer). Like the existing Manager Override Log, this viewer displays the manager authorizations given in POS for restricted actions. It allows you to view the overrides for a range of dates, a specific manager, a specific clerk, or a specific terminal. If the approval applies to a completed sale or return, use <Drill> to display the transaction in QuickRecall.

  Note: Access to this new viewer requires security bit 1142 “Access Manager Override Viewer (MOV)” which defaults to No.

- Andersen Windows Import users – This is an existing purchase option that allows you to import the orders you create in Andersen's Intelligent Quote application into the *Epicor Eagle™* POS for Windows application. Release 27.1 now has the ability to automatically add the window and accessories to inventory if they do not already exist in IMU. You can have the system use the Andersen SKU or generate the SKU number.

  Configure the system to automatically add Andersen windows and accessories to IMU:

  1. Make sure existing Options 5200 thru 5206 have the appropriate SKU entered for each type of window unit you expect to import. The settings of the SKU entered in the option which corresponds to the type of unit being imported are used when adding the new window unit to IMU.
  2. Make sure existing Option 5219 “Andersen - Cost Multiplier” has the multiplier used to calculate the window unit’s cost.
  3. Make sure existing Option 5207 has the appropriate SKU entered for accessories. The settings of this SKU are used when adding the window accessories to IMU (if Post Separately is set to Yes).
  4. Make sure existing Option 5220 “Andersen - Accessory Cost Multiplier” has the multiplier used to calculate the cost of window accessories.
  5. Decide if you want the window unit to be added to IMU with the Andersen SKU, in which case the SKU need only be added if it doesn’t already exist in IMU, or with a system generated SKU unique to each customer order. Refer to option 5281’s extended description for details on the format of the system generated SKU. Once you have decided, set the new Option 5281 “Andersen Windows Quick Add” accordingly – A to use the Andersen SKU, or G to use a system generated SKU.

     Regardless of using A or G, the window unit will be added to IMU using the settings of the corresponding window unit SKU entered in options 5200 thru 5206, the Price and Description from the import, and the cost determined by the multiplier entered in Option 5219 “Andersen - Cost Multiplier”. If option 5281 is set to G, the Andersen SKU will be placed in the SKUs Manufacture Part # for use in Purchasing and Receiving.

  6. If you post Andersen windows with the accessories as individual SKUs on the POS transaction (when the Post Separate flag is Yes) then decide if you want the accessories to be added to IMU with the Andersen SKU or with a system generated SKU. Refer to option 5282’s extended description for details on the format of the system generated SKU. Once you have decided, set the new Option 5282 “Andersen Accessory Quick Add” accordingly – A to use the Andersen SKU, or G to use a system generated SKU.

     Regardless of using A or G, the accessory will be added to IMU using the settings of the SKU entered in option 5207 “Andersen default SKU for "Andersen Accessory”, the Price and Description from the import, and the cost determined by the multiplier entered in Option 5220 “Andersen - Accessory Cost Multiplier”.

     Notes:

     - If you have set option 5281 or 5282 to have the system generate the SKU, enter the 2-character prefix of this generated SKU in the new Option 5283 “Andersen Windows Generated SKU Prefix”.

    - Make sure existing Option 5218 “Andersen - Use Andersen SKU” is set to Yes, if you have set option 5281 or 5282 to A.

- New Option 5001 “Stay on Big Header after using Customer QuickAdd” applies to terminals which start transactions on the POS Big Header screen. Set this option to Yes to remain in the Big Header screen after adding or updating a customer in Customer QuickAdd (using Header Menu 8). Set this option to No if you want to automatically go to posting after adding or updating a customer in Customer QuickAdd (using Header Menu 8).

- CARD Payments Processing - This functionality allows you to review the daily batch as well as perform back office transactions such as voids and reversals, refunds and sales. These transactions are typically adjustments and therefore have no impact to Eagle End-of-Day reporting or General Ledger passoff (Option 1345 "Point to Point Encryption on System" must be set to Y).

  Notes:

    - It does not work with any private label, gift cards, or in-store gift cards.
    - This feature requires the new security bit 1156 “Access CARD Payments Dialog in CARD Viewer “ and existing security bit 573 “Controls access to VIEWCAD, RCAD, TRSTL, AMSTL”.

  To void an existing Credit or Sale transaction:

  1. Display the Credit Authorization Detail Viewer (enter Card in Ebrowser’s Launch bar).
  2. Use the lookup criteria to find the transaction.
  3. Highlight the transaction in the grid and double-click. A dialog box displays.
  4. The Transaction Type defaults to V (Void) and the transactions information displays.
  5. If this is the correct transaction Click <OK> to proceed with the void. You will receive a response from the processor within a few seconds.
  6. Click <Refresh> in the viewer and you should see the Transaction Status column changed to “Voided”.

  Note: Depending on the processor voiding a transaction must occur within x hours of its creation (refer to your processor). Outside of this time limit use the steps below to issue a Credit transaction.

  To add a Credit for an existing Sale transaction:

  1. Display the Credit Authorization Detail Viewer (enter Card in Ebrowser’s Launch bar).
  2. Use the lookup criteria to find the transaction.
  3. Highlight the transaction in the grid and double-click. A dialog box displays.
  4. If this is the correct transaction change the Transaction Type to R and Click <OK> to create the credit. You will receive a response from the processor within a few seconds.
  5. Click <Refresh> in the viewer and the new Credit transaction will appear.

To add a Sale for an existing Credit transaction:

1. Display the Credit Authorization Detail Viewer (enter Card in Ebrowser's Launch bar).
2. Use the lookup criteria to find the transaction.
3. Highlight the transaction in the grid and double-click. A dialog box displays.
4. If this is the correct transaction change the Transaction Type to S and Click <OK> to create the Sale. You will receive a response from the processor within a few seconds.
5. Click <Refresh> in the viewer and the new Sale transaction will appear.

To add a Sale or a Credit:

1. Display the Credit Authorization Detail Viewer (enter Card in Ebrowser's Launch bar).
2. In the Misc Menu select P "CARD Payments".
3. Select either R (to create a Credit) or S (to create a Sale) and fill in the required information. Entering the card number will launch this secure card entry dialog that communicates directly to the Epicor Gateway to return a token for the card.

   Note: Zip Code and Security Code (CVV) are not required but may reduce processing fees if included.

4. Click <OK> to create the transaction. You will receive a response from the processor within a few seconds.
5. Click <Refresh> in the viewer and the new transaction will appear.

- The existing Loyalty by Clerk Report (RLC) report has been renamed to "Loyalty/Donations/Sales by Clerk Report (RLC)". In addition to reporting loyalty sales by clerk, this report can now report charitable donations by clerk, or sales of a specific SKU by clerk.

Inventory Enhancements

- New Option 1783 "IMU - Default view for Inventory Viewer" allows you to define the saved view to use when launching the Inventory Viewer from Inventory Maintenance (IMU).

  Note: Epicor recommends that this option's Kept By method be set to user, so that each user can define their own view (to access an option's Kept By method, in Options Configuration click Misc and select K).

- Label Manager – These additional fields are available to print on labels:
  - Type 8 Extended Description
  - Type 14 Extended Description
- Physical Inventory Posting (PIP) - The PIP grid now populates an item's locations regardless of whether or not a count has been entered for that location. Previously, each location only displayed

in the grid if a count was entered for it. Now the employee auditing counts in PIP has a visual clue that a location hasn't yet been counted.

Note: Make sure option 1136 "Number of Locations Per Item" reflects the maximum number of locations you use in your store.

- Vendor Import – This new import tool allows you to add or update Vendors. Prerequisite is Inventory Import (MSY Option 73). To enable this import set Option 1798 "Vendor Import" to Yes. Use security bit 1151 "Access Vendor Import Designer" to control access to the designer. Use security bit 1152 "Access Vendor Import" to control use of the import. The designer and import are available on Eagle Browser's Data Import menu.

- Inventory Supporting Files Import –This new import tool allows you to add or update departments, classes, and finelines. Prerequisite is Inventory Import (MSY Option 73). To enable this import set Option 1800 "Inventory Supporting Files Import" to Yes. Use security bit 1155 "Access Inventory Supporting Files Imports and Designers" to control access to the designer and import for these supporting files. The designer and import are available on Eagle Browser's Data Import menu.

- UPC Import – This new import tool allows you to add or update multiple UPCs for an item. Prerequisite is Inventory Import (MSY Option 73). To enable this import set Option 1799 "UPC Import" to Yes. Use security bit 1154 "Access UPC Import and Designer" to control access to the designer and import for UPCs. The designer and import are available on Eagle Browser's Data Import menu.

- Maintain Dynamic Promotions (MDP) – New Option 1801 "Dynamic Promotions - SKU lookup only displays item-based DP's" allows you to determine if the SKU lookup in MDP displays only active item-based promotions or displays all active promotions (both item-based and totals-based active promotions). Set to Yes, to show only active dynamic promotions where the SKU entered is on the promotion's Item List.

Purchasing & Receiving Enhancements

- Receiving Report (RRP) – Update Prices V "Do Not Update Alternate Vendor Cost" and W "Do Not Update Mfg Vendor Cost" are available for any customer to use.

Accounts Receivable Enhancements

- Customer Import – This new import tool allows you to add or update customers. To enable this import set Option 1796 "A/R Customer Import" to Yes. Use security bit 1149 "Access Customer Import Designer" to control access to the designer. Use security bit 1150 "Access Customer Import" to control use of the import. The designer and import are available on Eagle Browser's Data Import menu.

Note: Use the Customer Contacts Import on the Eagle Browser's Data Import menu to add or change customer contacts.

Telecommunications/National Account Enhancements

Ace Hardware

- New EFM Option 3224 “Ace EFM - add promotion price which is same as retail?” applies to 'specific price' promotions added to MIP where Ace’s promotion price is the same as the item's retail price. Set to Yes if you want a promotion price which is the same as retail to be added to MIP. Otherwise set this option to No.

  Note: Ace's best business practice is to set this option to Yes as it will allow Minimum Advertised Price items, such as grills, to be included in the qualifying totals for type 7 Dynamic Promotions.

Pharmacy Enhancements

- New Option 9778 “Pharmacy Allow posting same Prescription to transaction more than once” set to Yes allows you to post the same RX record multiple times in a single transaction.

- Security Bit 1053 “Ability to delete pharmacy Prescription Record Management records” now controls the ability to change the Status of RX records via VIEWRX/MISC as well as to delete the RX records from the Eagle system.

New/Changed Security Bits

All of these new security bits default to No, except 1003 and 1004 which default to Yes to preserve existing behavior.

- 1003 “Ability to change serial numbers”
- 1004 “Ability to delete serial numbers”
- 1142 “(MO) Access Manager Override Viewer”
- 1143 “(MO)Invoice a POS transaction with serialized item(s) without a serial #”
- 1144 “Ability to take a deposit for On Range transaction”
- 1145 “(MO)Allow cancelling, voiding, and account lookup for BlueTarp”
- 1146 “Access Acehardware.com Viewer”
- 1147 “Ability to delete transactions from Acehardware.com Viewer”

- 1149 “Access Customer Import Designer”
- 1150 “Access Customer Import”
- 1151 “Access Vendor Import Designer”
- 1152 “Access Vendor Import”
- 1155 “Access Inventory Supporting Files Imports and Designers” .

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