What's New on Release 27

Welcome to Eagle Release 27 (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, Inventory, etc.).

Note: It is highly recommended that Eagle Analytics users upgrade to Compass 14.0.0.3535 or higher when upgrading to Eagle Release 27.

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. If you receive patches automatically (Vista Bedcheck) and are on Release 26.1, 26 or 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 26.1, 26 or 25.1, install the eConnect.msi on the Release 27 Eagle Client Applications CD. Access the eConnect 3 User Guide at http://www.epicor.com/eaglerelease/.

EMV

- Retail Based Application (RBA) version 21.01 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 for these enhancements:

    - EMV Debit Steering – New Option 1777 “EMV Debit Steering enabled” set to Yes and option 5129 "Debit Bin Range / EMV AID Checking in POS" set to Yes allow use of debit steering for EMV. Once enabled, POS will compare the amount entered in Option 5128 "Debit Cards Transaction Threshold" to steer the transaction towards Credit or Debit accordingly. If the transaction amount is at or above the dollar amount indicated in this option the PIN pad will steer the consumer to pay by PIN based debit. Otherwise it will be processed as a credit card. On the pad’s approval screen, if desired the consumer can select “No” (or “Cancel”) which causes the PIN pad to step back to the Select Transaction Type screen. From this screen the consumer can select Credit or Debit.

      Note: When Option 5129 is set to No, the transaction type selection buttons for Credit and Debit will appear for manually directing the transaction.

    - EMV Chip Failures:

        - The PIN pad has a new “Please Swipe” screen indicating that it received a valid technical EMV chip failure and that the transaction is flagged as a technical fallback.

        - Also, if a card fails a chip read three times in a row and none are valid technical EMV chip failures, you can configure your PIN pad so that it will display the "Please Swipe" screen and flag the transaction as a technical fallback. To enable this functionality, go to Device Configuration for the PIN pad and check the ‘Allow “swipe” after three failed chip card reads’ field. This change meets the guidelines the credit card issuers (Visa, MasterCard, and American Express) have given to POS providers to allow them to flag a transaction as a technical fallback moving the liability back to the issuer rather than the merchant.

    - New E4W Option 1758 “Minimum Transaction amount to allow cash back on debit” allows you to enter the minimum dollar amount the total purchase must be before the PIN Pad will display the prompt for cash back on a debit transaction. Defaults to 0 which means no minimum amount is required. For example, use this option to prevent a consumer from buying that $1.00 pack of gum and asking for $ 20.00 cash back.

POS

- On default cash customer transactions paid by credit or debit card, if the customer's name is present on the payment card, the customer's receipt will print their name. The name on the card will also display in the "Customer Name" column of QuickRecall.

    - Applies to both Debit and Credit cards regardless of how option 9119 "Track data to use for Credit Card Processing" is set.

    - Previously with option 9119 set to "Use track 1 for credit card processing", the card's name was only captured from credit cards. With option 9119 set to "Use track 2 for credit card processing", the card's name was NOT captured from either credit or debit cards.

  Notes:

  - Manually entered cards will display "Manual Entry" and transactions split between multiple cards will use the last card entered.

  - In-Store Gift Cards will display the name you gave the supplier who produced the cards.

  - The Ship To line 1 value on the POS Big Header overrides the card's name.

  - The name entered in the "Cash Customer (or Required Consumer) Information" dialog overrides the card's name.

  - Not applicable to Tender Retail.

- For Warehouse Inquiry, option 1775 "Warehouse Inquiry: Order Quantity set to amount not filled" has been added. Set this option to Yes if you want the Warehouse Inquiry screen to set the order quantity with the quantity not filled by the store's available quantity. For example, POS clerk orders quantity of five and store has two available, then Warehouse Inquiry will set the quantity to be ordered to three when using this option. Set this option to No if you want the Warehouse Inquiry screen to set the order quantity to the most likely amount to order which may be zero (to allow the user to override the quantity or to source elsewhere). For example, POS clerk orders quantity of one and store has none available then Warehouse Inquiry will set the quantity to be ordered to zero.

Service and Repair Enhancements

- Multiple Repair Types – You can now define multiple Repair Types for the clerk to select from when creating a Service Order in POS. With this enhancement, you can add multiple Repair Types (up to 46). Each Repair Type has its own set of Equipment Description prompts (three user-defined prompts) and Additional Info prompts (four user-defined prompts). You can indicate if an answer is required or not for each of these prompts. You can also specify the department which contains the pre-defined repair packages you have created for each repair type. You also indicate for the Repair Type if you want the answers to the user-defined additional prompts to print or not print on the printed order and invoice.

  Note: Refer to the "Service and Repair: Set Up Repair Types" topic for more details on how to set up Repair Types.

- The Service Order Viewer (SOV) has the new columns: "Repair Type", "Repair Description", "Equipment Description", and "Addtl Info".

- The Service Order History Viewer (Compass Viewer) has the new columns: "Repair Type", "Addtl Info 1", "Addtl Info 2", "Addtl Info 3", "Addtl Info 4", "Firearm Repair Acq Created".

Note: Current users who only do one repair type do NOT need to add a Repair Type – the values of options 9301-9307, 9308, and 9324 will continue to be used. But if they would like the Repair Type's flexibility for indicating if an answer to one of the prompts is required, they set up a single Repair Type.

- New "Starting Service Order" event allows you to specify the customer information which is required when creating a new Service Order. To configure this new event use the Flexible Consumer Information setup utility on the Configure page of Eagle Browser ribbon's File tab. Also available on the Tools menu of Ebrowser toolbar (access requires security bit 446). This is applicable to customers who use the Flexible Consumer Information feature of POS (option 1498 "Flexible Consumer Information collection enabled?").

- Maintain Dynamic Promotions (MDP) – You can now change the schedule for multiple Dynamic Promotions at once. To use this feature all selected promotions must have a non-blank Promotion Type. Display the check box column in the MDP grid and place a check mark in the box for each promotion whose schedule you want to change. Click Schedule and then update the Start and End Dates, the Start and End Times and the Activate status.

- Offline POS Enhancement – When Transactional Security users (Option 1345 "Point To Point Encryption on system" set to Y) create an Offline POS transaction, the card number stored in QuickRecall will now be a masked card number instead of the encrypted card number. This change makes returns for an offline transaction easier by prompting the user to insert or swipe the original card. Previously, a return against an Offline transaction paid by credit card failed because the original card number could not be decrypted.

- Voided Items Viewer (VIV) – This is a new viewer available from the Eagle Browser, type VIV in the Launch bar, and click Enter (alternatively, you can click the Sales Review Menu then Voided Items Viewer). This viewer displays voided items for a range of dates (newest to oldest), a specific customer, a specific part, or a specific clerk:

  - Parts added and then voided on completed Sales and Credit Memos.

  - Parts added and then voided on a Sale which gets Suspended.

  - Parts on voided Sales and Credit Memos.

  - Parts on transactions created when using training mode.

  - Parts added and then voided from a new Order, Special Order, Estimate, Service Order, Layaway, or Transfer prior to it being saved.

- Parts on new Order, Special Order, Estimate, Service Order, Layaway, or Transfer where the transaction gets voided before being saved.

- To get started enable Option 1752 “Record POS Voided Transactions and Voided Items" and assign security bit 1141 "Access Voided Items Viewer (VIV)" to the roles you want to have access to this information.

- Review the number of days entered in option 108 “Days to keep Voided POS Transactions” if you want to increase the period of time than the default of 120 days (four months).

Notes:

  - This viewer will NOT display voided parts on existing Orders, Special Orders, Estimates, Service Orders, Layaways, or Transfers which are subsequently deleted.

  - The information in the Voided Items Viewer is mapped in Compass giving you the ability to share this information with a 3rd party loss prevention company.

  - Neither RICU nor CCN/CCJ update the voided item’s part nor Customer/Job since it is historical data.

  - Existing report RVT (Void Transaction Detail Report) continues to be available for use. But unlike this viewer it does NOT report on items which are added and then deleted from a completed or saved transaction.

- Charitable Donations – New Option 1776 “Allow clerk to make donation selection for the customer” allows the clerk to make the customer's Charitable Donation selection for them. When set to Yes, if the clerk sees the customer is confused by the donation prompt on the PIN Pad, they can ask the customer if they wish to donate. If the customer agrees the clerk can enter the selection for the customer in the 'Waiting for Customer's Selection' dialog on their POS screen. If the customer refuses to donate, the clerk types "D" to NOT donate. The existing behavior is unchanged when option 1776 is set to No, where the clerk's only choice to help the customer is to not donate.
- Commercial Card Interchange Fees reduced – Now ROA payments on account as well as sales paid by a commercial credit card will process at the lowest possible interchange rates in POS. The system will pass a tax amount in the authorization record (for ROAs the tax amount is based on the payment amount and store’s tax rate). A tax amount is required to qualify for the lowest interchange rates possible.

  Note: This tax amount will NOT be passed or recorded anywhere else in Eagle; only in the outgoing authorization request.

- POS Receipts – New E4W Option 1778 “Print Frequent Buyer promotion status on customer receipt” set to Yes allows you to print the status of up to five frequent buyer promotions if you have a loyalty program and use Frequent Buyer promotions. The receipt will print the promotion description, the # of units purchased so far, and the # of units left to buy before they receive the benefit of that promotion (a free or discounted purchase).

Note: This status does NOT reflect items bought on the current purchase.

- POS Digital Consumer Display – The consumer display now supports using a monitor with an aspect ratio of 16:9.

Inventory

- Flexible Inventory Load (FIL) and Inventory Import – The Flexible Inventory Loading workflow's existing option 1651 "Flexible Inventory Loading allows setting fields to blank" now applies to all fields which are allowed to be blank, or 0 if numeric (previously, this capability existed for only a subset of the fields these functions update). You can control which fields you want to set to blank by entering a "?" (question mark) in the field.

- Inventory Maintenance (IMU) – The new Note Type 14 is available on the Notes tab. If you have been using Note Type 3 for additional word indexes, consider using Note Type 14 for non - POS information such as special notes for merchandising or ordering.

  Note: For Compass users, this new note type requires the new version of Compass 14.0.0.3535.

- Inventory Maintenance (IMU) – You can now enter your own description for each inventory Note Type you use on the Notes tab of IMU. See options 1768 thru 1773.

- Build Description Index (BDI) – If you are using the new Note Type 14 for additional words to identify items, you can add it to the BDI in your EOD queue.

- Inventory Import now supports the ability to import Note Type 14.

- Copy Inventory to New Store (COPYRECS) – Existing option 9488 "Keep vendor contacts the same in all stores?" set to Yes allows you to keep vendor contacts when you use Copy Supporting Files V (Vendor) functionality while copying vendors from one store to another.

Purchasing and Receiving

- The Buyer's List - The Buyer's List has the new "Popularity Code" column which is initially hidden and needs to be selected in 'Select Columns to View' (column heading is Pop Code).

- MPO & Buyer's List – The PO# drop-down list now contains the PO's Due Date.

Accounts Receivable

- A/R Statements (RSM) – New option 2 “Print Credit Limit and Credit Available” is available for this report. If RSM Option ‘2’ is selected, the customer’s credit limit and credit available will print at the bottom of the statement.

- Importing Customer Contacts – With this new functionality you can quickly add a list of customer contacts to Customer Maintenance if option 3509 “Allow access to customer contact fields in Customer Maintenance” and security bit 733 “Ability to add/change/delete customer contacts (names)” are set to "Yes". The customer number and contact name must be in a comma separated value file (CSV file-usually an Excel file).

Miscellaneous

- Weblinks enhancements – Weblinks were added on Release 25 as a feature of Eagle N Series. They are 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. We have made the following enhancements on Release 27 for Weblinks:

    - A Weblink can now be a PDF stored on the local network. To link to images stored locally on your network, use the "file://" prefix (i.e. "file://x:\images\image123.jpg") and files in either of these formats: “jpg”, “png”, “gif”, or “pdf”.

    - Inventory Import now supports importing up to five Weblinks for an item at one time. The import only adds Weblinks, up to the maximum of five. It does NOT change or delete existing Weblinks. Continue to use the Weblink Maintenance Viewer for those processes.

- Text Messaging (Purchase Option) – If existing option 1673 “Text Messaging (SMS) available on System” is set to Y", you can now send Eagle Alerts to your employee’s cell phones in one-way text messages.

New/Changed Security Bits

- 1140 “(MO) Allow entry of Air Miles promotion code 9915”.

- 1141 “Access Voided Items Viewer (VIV)”.

