



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, Inventory, etc.).

Note: It is highly recommended that Eagle Analytics users upgrade to Compass 14.0.0.3905 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 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/>.

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Serial Number Tracking

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 part 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 enhancements 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 part. 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. Manufacturers 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 part as well as on the trade-in part.

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 available from the Eagle Browser. Type SNV in the Launch bar, and click Enter (alternatively, you can click the Inventory folder, click Setup and Maintenance and then click Serial Number Viewer). The viewer displays serial numbers for a specific part or for all parts 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 parts 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" dialogue. Set Number of Labels to "Each Serial # received" and click <OK>. One record for each part/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 part/Serial # received will be added to the batch that you can import and print from the Label Manager.
- 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.

Note: If you are multi-store, Option 8990 "Require Store when adding Serial #'s" must be set to Yes and you must have a store number entered on each available serial number. Use the Serial Number Import tool to quickly add the store each serial number exists in.

POS

- 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 view the transaction. Use <Display> to launch the Daily Journal Viewer.

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

- 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.
- Debit transactions can NOT be voided.
- Transactions to branded debit cards (Visa/MC/Discover) work as sale/refund transactions but NOT as debit transactions due to lack of PIN information.
- 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”.

- The Credit Authorization Detail Viewer (CARD) has a new column "Source" instead of the existing column "Offline?" describing the source of transaction. Possible values in this column are: Offline, POS, Renewal (Loyalty Subscription Renewal), and Backoffice.

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.
- As part of the CARD Payment process you can now print a "Back Office Voucher" in case a cardholder or some other party requires evidence of a transaction.

To print a transaction voucher:

- 1) Launch the CARD viewer.
 - 2) Highlight a transaction in the grid.
 - 3) From the Misc menu select Option "R" - Print Back Office Voucher. The list of installed Windows printers (on the PC) display. The default printer is highlighted.
 - 4) Select a printer (if more than one) and press <OK>.
- SAF Issue Notification - The Card Viewer has two new status types: Approved SAF and Rejected SAF which display under the Transaction Status column.
 - The Approved SAF status signifies that the transaction was initially approved and later approved by the processor. No further action is required.
 - The Rejected SAF status signifies that the transaction was initially approved at POS and later declined by the processor similarly to an offline POS transaction. Review the "Credit Auth Transaction Log" and contact your payment processor for more information.
 - 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 part by clerk.

The Bag/Bucket Sale feature has two enhancements:

- You can now define a list of items which will receive a discount overriding the list entered in option 8639 "Default 'Bag/Bucket Sale' Discount Percent". New options 1803-1810 allow defining up to four different discounts and the items eligible for that discount override.

Note: An override discount of 0% can be used.

- You can now enter a Start Date for the next planned Bag/Bucket Sale. Enter the Start Date in new Option 8636 "Start Date for the Bag/Bucket Sale" and the End Date in existing option 8642 "End Date for the Bag/Bucket Sale". Once the current date is equal to or greater than the Start Date entered in option 8636 and less than the End Date entered in option 8642, the ability to post items for a bag or bucket sale will be allowed if Option 8637 "Allow 'Bag/Bucket Sale' feature in POS" is not No (it is A or B).

Note: Entering a Start Date and an End Date for the bag sale/bucket sale is not required, but it is highly recommended.

Inventory

- 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 users 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 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.
- Maintain Dynamic Promotions (MDP) – New Option 1801 “Dynamic Promotions - SKU lookup only displays item-based DP’s” allows you to determine if the part 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 part entered is on the promotion’s Item List.

Purchasing and Receiving

- 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.
- Centralized Distribution – With this release, the system maintains the links to customer special orders on the items being distributed to the remote stores. When the PO is received, the transfers generated for each remote store will carry the special order link which exists in the PO detail line into the transfer’s detail line. Now when the transfer is completed, the customer special orders will be updated as having been received. For these special order items, either on a special order transaction or special order items on an order, the line item detail will display the original PO the special order was linked to, the transfer it was moved to, the transfer status, and the transfer ship date.

Accounts Receivable

- 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.

Accounts Payable/General Ledger

- Vendor Viewer has three new columns:
 - Federal ID Type
 - Federal ID Number
 - 1099 Category

Notes:

- These three fields are on the Accounts Payable tab of MVR.
- Security bit 1106 is required for displaying the columns in the viewer.
- New Option 1811 "Print 2nd Address line on Laser RA99" allows you to print a 2nd address line on your Laser 1099 Forms (RA99). The Address line is from the Main tab of Vendor Maintenance (MVR).

Note: If the 2nd Address line begins with "DBA:" then it will print directly beneath the Vendor's Name, otherwise the 2nd Address Line will print beneath the 1st Address Line on the Laser 1099 Report (RA99).

Defective Inventory G/L Management

- POS Defective Returns and Defective Purchase Orders can now post to the Defective Inventory G/L Account instead of the regular Inventory G/L Account for Inventory Transaction Register (ITR) and G/L users. GLSET contains a Store Level and Department Level Defective Inventory Type that should be setup with the desired G/L Account for Defective Inventory. Once GLSET has been updated, the following options should be enabled:
 - Option 3060 "Create G/L trx's from ITR record for defective inventory returned at POS" set to E = Eligible or N = Not eligible but can be changed to allow GLP for ITR Passoff to G/L for items returned and marked as defective in POS. When an item is returned defective or exchanged defective in POS, an ITR record will display with the G/L Passoff cell as either E or N, depending on how option 3060 is set. If the ITR record is set to E, GLP for ITR Passoff will pass this record to the General Ledger that will credit the regular inventory G/L account and debit the defective inventory G/L account.
 - Option 9937 "Create G/L trx's from ITR record for Defective Purchase Orders" set to E = Eligible or N = Not eligible but can be changed to allow GLP for ITR Passoff to G/L for items returned on a defective purchase order. When a defective purchase order is finalized and received by RRP-F, an ITR record will display for each line item received with the G/L Passoff cell as either E or N, depending on how option 9937 is set. If the ITR record is set to E, GLP for ITR Passoff will pass this record to the General Ledger that will debit the regular inventory G/L account and credit the defective inventory G/L account.

Bill of Material and Kit Record Inventory G/L Management for POS Transactions

- Bill of Material (BOM) components and Kit Record components can now post to their respective inventory G/L account(s) instead of the BOM Header or Kit Header inventory G/L account for ITR and G/L users. The following options are added for this feature:
 - Option 3065 “Create G/L trx’s from ITR records for BOM”. Set this option to E = Eligible or N = Not eligible but can be changed to allow GLP for ITR Passoff to G/L for BOM Headers and Components sold or returned in POS. When a BOM is sold in POS, an ITR record will display with the G/L Passoff cell as either E or N, depending on how Option 3065 is set. If the ITR record is set to E, GLP for ITR Passoff will pass this record to the General Ledger that will debit the BOM Header part’s department G/L account and credit the BOM Component part’s department G/L account(s).
 - Option 3066 “Create G/L trx’s from ITR records for kits”. Set this option to E = Eligible or N = Not eligible but can be changed to allow GLP for ITR Passoff to G/L for Kit Headers and Components sold or returned in POS. When a Kit is sold in POS, an ITR record will display with the G/L Passoff cell as either E or N, depending on how Option 3066 is set. If the ITR record is set to E, GLP for ITR Passoff will pass this record to the General Ledger that will debit the Kit Header part’s department G/L account and credit the Kit Component part’s department G/L account(s).

Note: ITR is controlled by option 43 “Inventory Transaction Register on System.”

Advanced Receiving

- Option 9400 “Create MRV records for transfers at the to-store” allows you to consider completed transfers in average cost calculations in Advanced Receiving. When a transfer is received in a store from another store between the time a PO was received to when a PO is modified and/or invoiced in Advanced Receiving, the received quantity and cost of the transfer is considered when the average cost is recalculated at the time RRV with option F is run.

Note: Option 8628 “Windows Advanced Receiving on System” must be set to Y.

Miscellaneous

- Reminders - You can now email and/or text a user their Reminders. To use Reminders the alert option "Record 'Allow user-defined reminders' alerts" must be set to Yes in Options Configuration, and the user must have security bit 675 “Ability to add Eagle reminder Alerts”. Each user will then go into their Alert User Profile and on the “Reminder” row set Receive Alert? to M (Only show if for me), set Receive Email? to Yes if they want the reminder emailed to them, and set Receive Text? to Yes if they want the reminder texted to them (requires entry of Text Phone number in their Alert User Profile).

Notes:

- To receive Reminders by Email or by Texting requires running report Send Reminder

Alerts (RSRA). Add report RSRA to a daily queue which runs in the morning. Any Reminders due that day will be emailed and/or texted once this report runs.

- Refer to these help topics for more information on Reminders:
 - "Entering a Customer Reminder" - Reminders for a customer
 - "Entering a Vendor Reminder" – Reminders for a vendor
 - "Scheduling Reminders in Eagle Alerts" – General Reminders
 - "Customer Activity Notes: Add Notes" – Customer Activity Notes can send a reminder.

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 #"
- 1145 "(MO)Allow cancelling, voiding, and account lookup for BlueTarp"
- 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"