Sales Enablement Training – Eagle Release 29.1

Eagle Release 29.1 will be generally available soon.

Did you know that Epicor provides complete, secure, user-friendly business solutions to local retailers in nearly 8,000 locations?

Real-time data, robust reporting, and complete omnichannel solutions are among the many features that help drive efficiency and growth.

Customer feedback shapes the foundation of every Epicor Eagle release and extends Epicor's commitment to complete retail for your entire business.

Our focused functional enhancements mean we continuously advance the Epicor Eagle solution forward to meet the evolving needs of retailers and market requirements.

Eagle Release 29.1 delivers enhancements to help retailers simplify and optimize their retail processes, to do more with less, enabling them to better serve their customers and grow their business.

Select the topic buttons to learn more about the enhancements included in Epicor Eagle Release 29.1.

Remember, for a comprehensive review of all Release 29.1 features and enhancements, please review the What's New documentation.

Topics

- Point of Sale and Inventory

- Purchasing and Receiving

- Miscellaneous

- Ace Hardware

- Marketing Communications

Point of Sale and Inventory

We added functionality to adhere to new mandates for keeping customer credit card information on file.

Issuers now have more specific requirements for storage and use of credit card data for future purchases and billing.

Merchants must identify when a card is initially stored and subsequent authorization requests.

In Eagle Release 29.1, the following indicators automatically trigger notifications:

Stored Credit Card Data, Data Conversion, Consumer Initiated Transactions, Miscellaneous Menu Option, and Card Holder Disclosure and Consent.

Point of Sale Adders

We enhanced Maintain Point-of-Sale Adders to include a new adder type, "Q—Flat Amount with Quantity," allowing clerks to add a quantity that is calculated against the flat amount of the adder on the Totals screen.

The flat amount and quantity display on the receipt for the customer.

Point of Sale Punch Promotions

We enhanced Apply DP Pricing When Order and Special Orders are invoiced to include support of punch promotions. When this option is enabled, if an order or special order is invoiced, the punch promotion will be applied.

Inventory Discontinued & Store Closeout Fields

The Discontinued and Store Closeout fields are now visible under the Primary Vendor column in the Vendor Tab of Inventory Maintenance (IMU). When information changes in either field, the system automatically updates these fields in this column.

Purchasing and Receiving

Purchasing and Receiving Enhancements

We added two enhancements to AP Assist.

AP Assist Processing Multiple Purchase Orders

In the AP Assist Processing Viewer (APA), you can process multiple purchase order records at the same time instead of managing them individually.

Simply enable the check boxes for the lines you want to process, and set the flag, OK to Finalize.

AP Assist Processing Viewer

Use F6, Display, from the tool bar to launch Change Vendor Invoice information and edit the following fields in the AP Assist Processing Viewer that have been imported from SPEID:

PO Number,

Invoice Number,

Invoice Date,

Discount Date, and

Net Due Date.

AP Electronic Payment—Multiple Credential Sets

AP Electronic Payments (ACH processing through EFT Networks) now supports the ability to add more than one set of credentials to send to EFT Networks for different stored bank accounts in a multi-store system.

Each store can now have separate bank accounts to pay vendors, requiring different File Codes be set up in the system and multiple AP directories.

AP Electronic Payments—Multiple Email Addresses

In Vendor Maintenance (MVR), you can add more than one email address in the Email Address field on the Maintain ACH information.

Use a semi-colon between emails to list who should receive the ACH information indicated, such as invoice notification.

Vendor Duplicates Viewer

Epicor Eagle Release 29.1 includes a viewer created to display and evaluate vendor records to identify duplicates in your system, based on certain filter criteria.

You can filter by store, vendor, or contact information, such as email, phone, or address.

Miscellaneous

The Email Audit Viewer (EAUD) can be used to view information for new purchase orders and invoice sent emails. This includes Invoices, Special Orders, Orders, Estimates, and Credit Memos. This new viewer helps you save time by sorting sent emails or use Search to find a particular email transaction.

Customer Duplicates Viewer Enhancements

When reviewing customer records, you can use the Acct Opened After date filter in the Customer Duplicates Viewer to limit the accounts opened after the selected date.

This can help filter the display of duplicates in the grid based on when the customer account was opened in the system.

This can be useful if you have already reviewed a list of duplicates and do not want to see them display again.

Epicor FFL Compliance Manager Application Option was added.

We added functionality to the Epicor FFL Compliance Manager Application.

The new option, Acquisitions Per Item to Send to FFLCM Without a Serial Number, limits the number of firearms acquisitions sent to the FFL Compliance Manager application, dependent on business needs.

The default is 100. (As a best practice, Serial Numbers are always sent in an Acquisition Request in Receiving.)

We update the Eagle N Series Chat Messaging System

To connect with Eagle Advice Line even easier, you can now launch Eagle Chat directly from the Eagle Browser.

Ace Hardware

As the exclusive point-of-sale solution endorsed by Ace Hardware, Epicor Eagle Release 29.1 contains many features designed specifically to support Ace retailers. These include:

Maintain PO (MPO) Grid

Use the new Future Normal column to view current and future purchase order items in the Maintain PO (MPO) grid. The column displays "F" for future PO Item or stays blank for current items.

Change Item Number

New columns have been added for Ace Discovery to the Ace Change Item Number (RCIN).

Flexible Inventory Loading (FIL)

New columns have been added for Ace Discovery to the Ace Flexible Inventory Loading (FIL). Fields must be activated using the ACEDISFL program.

Acenet Replacement Item Maintenance

If you reinstate a discontinued item, the system will use the default location from Class Maintenance. However, if the location was attached in the Acenet program, the system will use that location.

Ace Mobile Order Integration

Eagle Point of Sale can now receive orders entered through the Ace Mobile application. Those orders are processed as special orders, and a deposit may be accepted for the transaction. For more information, see Acenet's Ace Way or Retailing section.

California Consumer Privacy Act

For Ace Rewards New Member sign up, consumers can accept or decline the Ace Rewards terms and conditions at POS using the PIN pad. Set the option 1945 for California Consumer Privacy Act in Ace Rewards to Yes to enable this feature.

Marketing Communications

Customer Communications will announce the general availability for Eagle Release 29.1

In addition, there will be several supporting documents available to customers on the Eagle Customer Portal. These will include:

• What's New

• 29.1 Fact Sheet

• Installation Guides

• User Guides

Ace-specific customer communications will also be deployed in collaboration with Ace Corporate.

If you have any questions on Eagle Release 29.1, please contact Tricia Manning, Retail Product Marketing. Thank you.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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