

What's New in Epicor Retail Cloud 2020 R3

Order Points

Epicor Retail Cloud now supports the creation of order points. An order point is a value used for re-ordering stock based on the available quantity on hand. It is used to optimize inventory costs and avoid over stocking. For more information, see [Setting Up Order Points](#).

Availability of POS on Mobile+

POS is now available on Mobile+ providing point-of-service with the same experience as the web application. Mobile+ now provides the following POS features:

- Complete transactions or save them for later use.
- Add and edit customer information.
- Easily review product detail when posting items.

For more information, see <doc link>.

Customer Mass Update

Easily edit your store's customer information in bulk with the mass update function. See [Using Customer Mass Maintenance](#) to learn how to perform the mass update, view related alerts, and track the history of the changes.

Quick Find

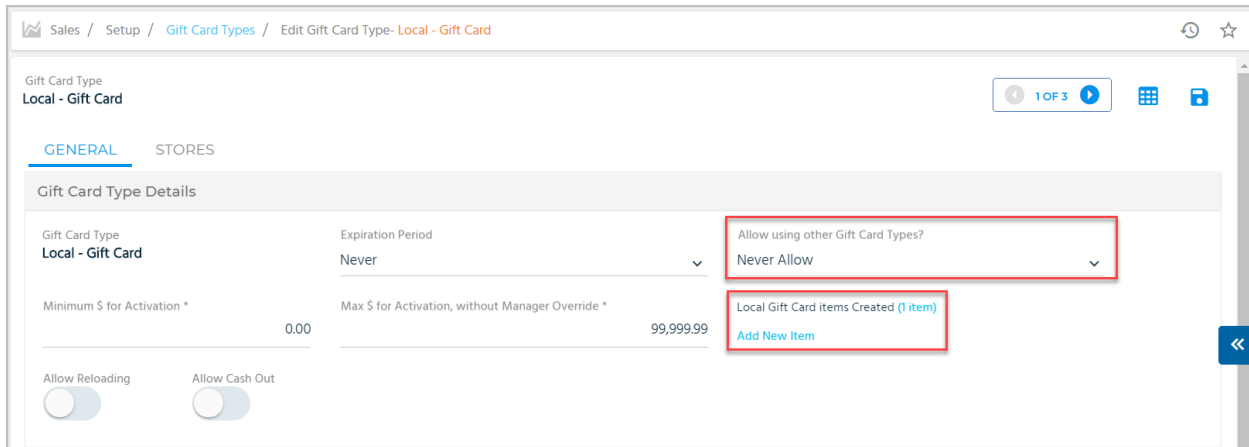
Setting up quick find layouts is made easier with new enhancements to the maintenance screen:

- You can now assign separate layouts to registers within the same store as opposed to assigning one layout per store.
- Multiple items can be added to the layout/group/sub-group at once.
- The **Select All** checkbox or the multi-select option allows you to delete items or assign a color to the items in one go.
- A larger color palette is now available.
- You can sort the groups, sub-groups, and items in a layout according to the price, item name, or location code to get your preferred view at point of sale.

For more information on the entire process in detail, see [Setting Up and Maintaining Quick Find](#).

Gift Card

- With the addition of the **Local Gift Card Items Created** field in the Local Gift Card setup screen, you can view the existing gift card SKU's and also add new gift card items.
- You now have the option to use other gift card types during a transaction at POS. In the setup screen for each gift card type, you can either select **Never Allow**, **Allow with Warning**, or **Allow without Warning** in the **Allow using other Gift Card Types?** field.




- In the setup screen, active gift card bin ranges can now be edited in case you've incorrectly entered the bin range at POS. To know more about this process, see [Editing Gift Card Bin Ranges](#).

Price Import

While importing price changes or creating alternate prices, you can skip entering the item SKU, provided you enter the valid UPC or Supplier Part Number to successfully complete the import.

POS

- At point of sale, you can now capture the signature on-screen when the PIN pad is disconnected.



CAPTURE SIGNATURE

Please have account holder or contact sign.

i Please click 'Cancel' to decline signature capture.

Sign in the box below.

✕ CLEAR


CANCEL **OK**

- In the payment screen, you can hit the **Esc** key on your keyboard to return to the posting screen.
- In the payment screen, the exact change button (the amount to be paid by the customer) is removed from the suggested values as the amount due is already populated.


Receipt Template Designer

You can now check/uncheck the **You Pay** box to include/exclude this field in the receipt at POS. Checking this box will display the total amount the customer pays per item.

INVOICE
RECEIPT



Logo Maximum
Recommended Size:
3" H x 4" W
or
188 H x 300 W Pixels

 Add

Company Name

Address Line

City State Zip Code
(999) 123-4567

Web Address

Transaction Type:

Transaction:

Date Sold:

Time Sold:

Customer Name:

Customer Number:

Clerk:

Resale/Tax Exempt Number:

Authorized to Charge:

Credit Terms:

PO Number:

Reference:

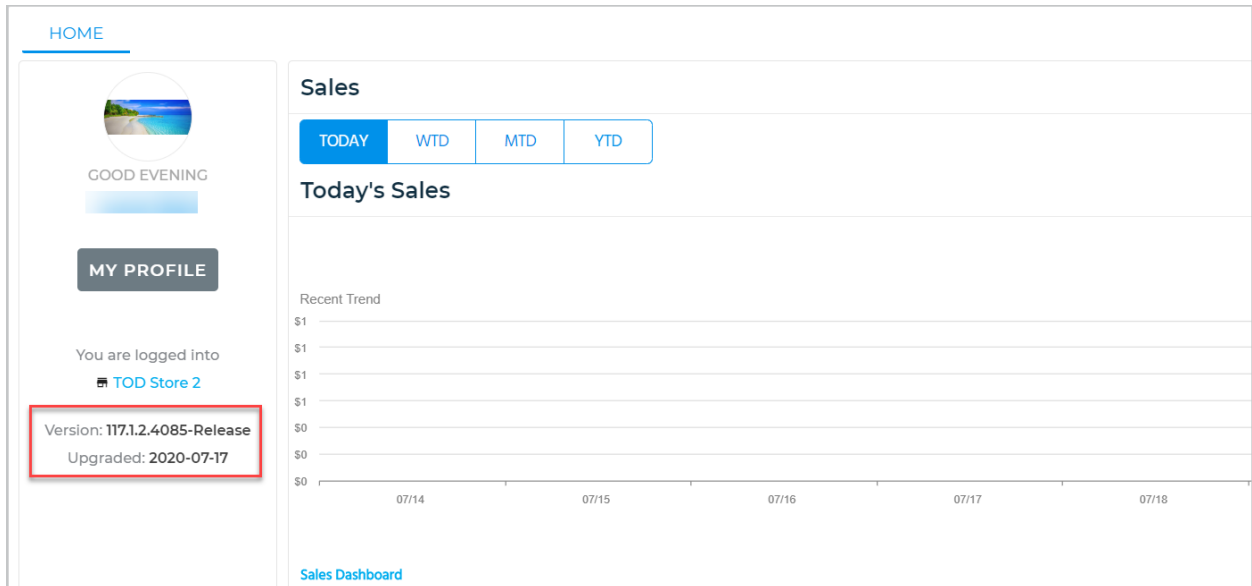
4-Plumbing and Heating Supplies

Group Items

1/8" Nut Inv Flare Brass		<input checked="" type="checkbox"/> You Pay	\$1.99
411B-2	Qty		1 EA
	<input checked="" type="checkbox"/> Original Price		\$1.99 EA

Upgraded Date on the Widget

On the home page, you can now see the upgraded date by selecting the version number.



Improved Navigation Menu Experience

Primary left-hand menu expands and collapses with user navigation with all choices clearly visible when clicked.

Blind Flow Count in Physical Inventory for Mobile App

New permission '**Ability to View Initial Qty in Mobile+ Physical Inventory**' has been added. Without this permission, you will not be able to see the existing quantity or variance allowing for a blind view of what needs to be counted.

Admin / Manage Roles / Edit Role - Accounting Manager

Permissions

Filter by Application: All

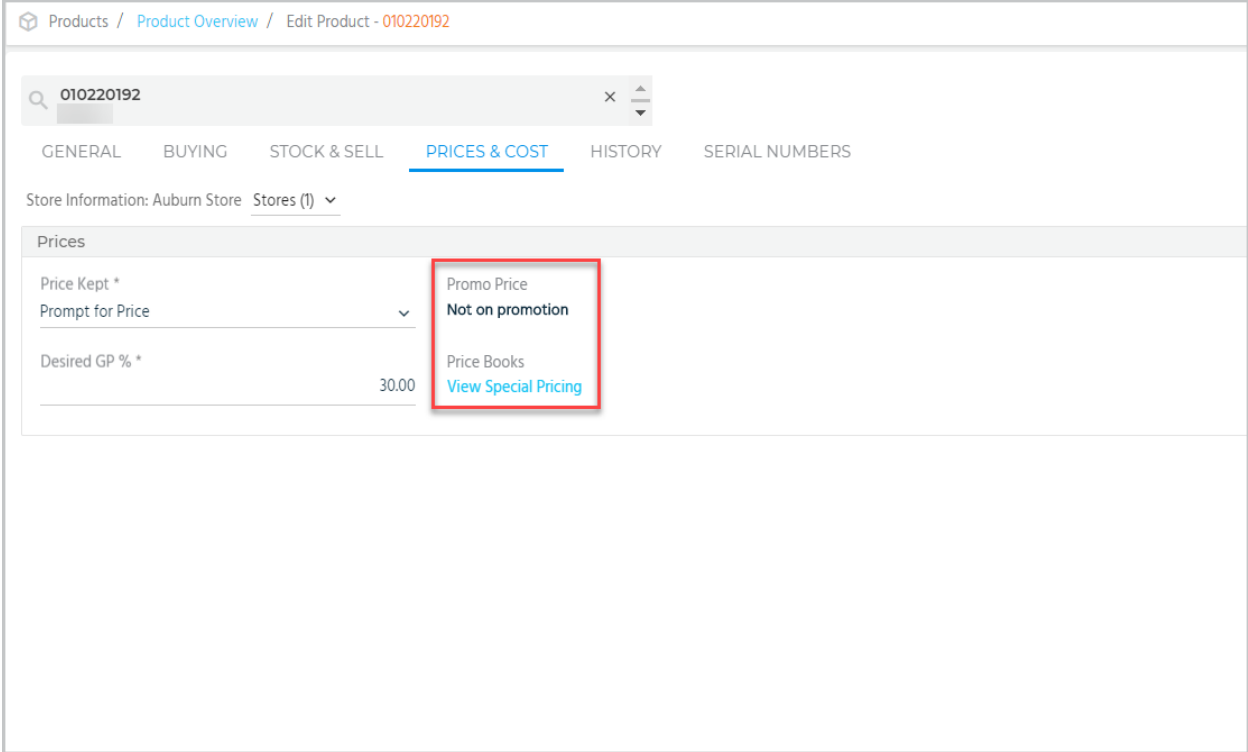
Search Permissions, Description

FILTER BY AUTHORIZATION: ALL | ALLOWED | NOT ALLOWED

<input type="checkbox"/>	PERMISSION	DESCRIPTION	APP NAME
<input type="checkbox"/>	Add Edit Physical Inventory Count	Allow the ability to add and edit Physical Inventory Counts	Product
<input type="checkbox"/>	Allow Add and Edit of Price Books	Allow the ability to add and edit Price Books	Product
<input type="checkbox"/>	Allow Add and Edit of Price Types	Allow the ability to add and edit Price Types	Product
<input type="checkbox"/>	Allow Serial Number Reference Changes	Allow changing the reference on a serial number in the Serial Number Audit Viewer or in the Serial Number tab in Product Maintenance	Product
<input type="checkbox"/>	Ability to view Initial Qty value in Mobile+ Physical Inventory	Allow access to view Initial Qty and Variance in Physical Inventory Mobile+	Product
<input type="checkbox"/>	Allow Physical Inventory Finalization	Allow the ability to finalize counts for items in Physical Inventory. This extends to inventory adjustments while in Product Maintenance.	Product
<input type="checkbox"/>	Access to Order Point Viewer	Allows the user the ability to add, edit and delete Order Point plans and rules	Purchasing
<input type="checkbox"/>	Access Finalization of PO	Allow the ability to finalize a PO	Purchasing

Promo Price - Prices & Cost Tab

The new field **Promo Price** in the *Prices & Cost* tab of the Products page allows you to see if an item has a promotional price applied to the product. It displays the lowest available promotional price if the item applies to multiple discounts. It displays **Not on Promotion** if the item does not have any discounts.



If the product has special pricing attached to it, then select **View Special Pricing** to view the details of the pricing such as the price book, customers, price groups, loyalty, rule name, rule type, and calculated prices.

SPECIAL PRICING

PRICE BOOK	CUSTOMER...	CUSTOMER PRICE GROUPS	LOYALTY?	RULE NAME	RULE TYPE	
Electrical Contr...	All	Electrical Contr...	No	Category Pri...	Promotion ...	\$37.99

1 - 1 of 1 items

CLOSE

Product Notes - Print Below Item on Receipt

In the POS Action drop-down list, there is a new option that enables printing notes at the end of the receipt or printing notes below items. **Print on Receipt** in the earlier versions is now replaced by **Print Below Item on Receipt**.

ADD NEW NOTE

Search Note Name, Description or Code

Note Name * Note Code

Note Description *

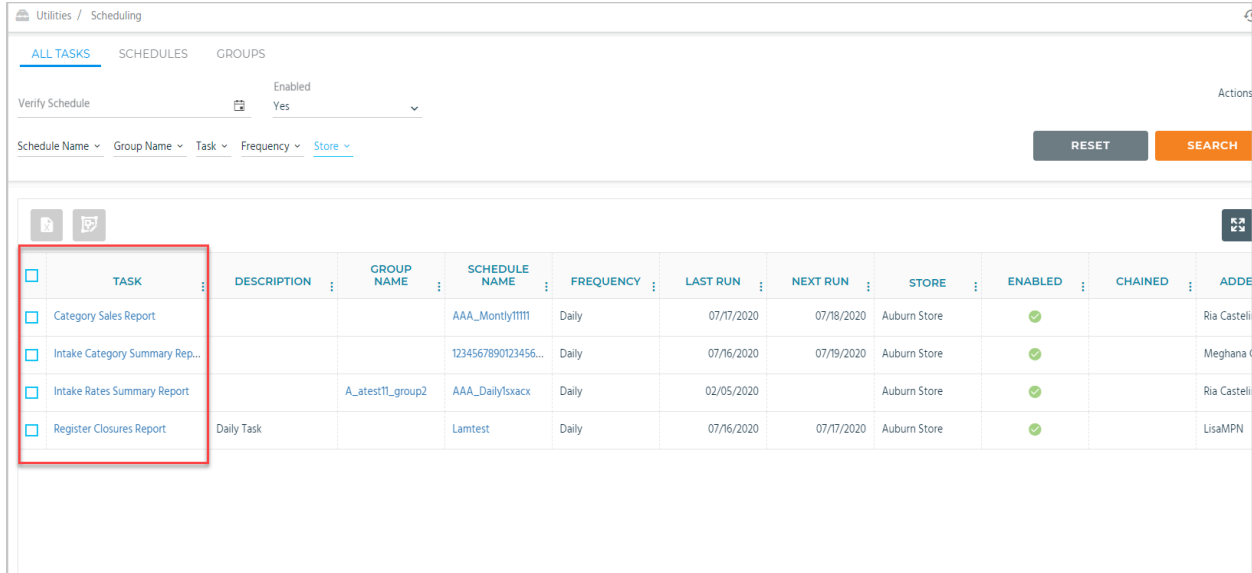
POS Action

- None
- Display At POS
- Display and Print below item
- Print below item on Receipt**
- Print on End of Receipt

CANCEL **RESET** **OK**

Scheduled Tasks

The Scheduling page invoked from the **Utilities** menu has tasks in the *ALL TASKS* tab as clickable hyperlinks.



Utilities / Scheduling

ALL TASKS SCHEDULES GROUPS

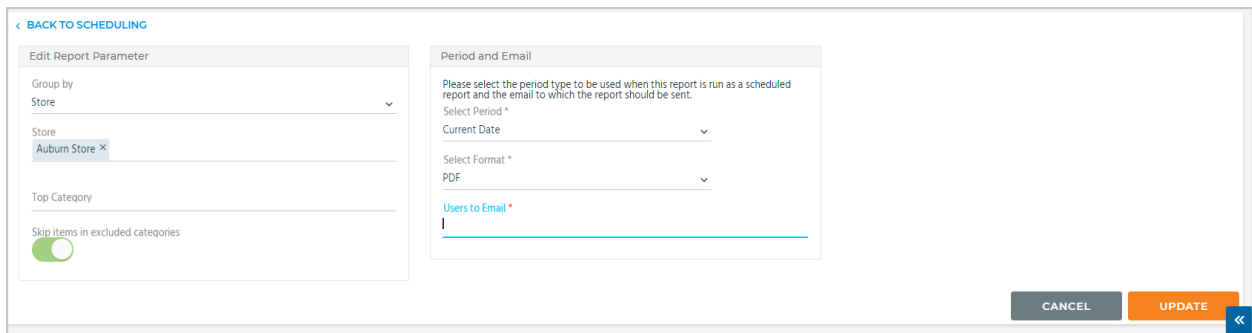
Verify Schedule Enabled Yes

Schedule Name Group Name Task Frequency Store

RESET SEARCH

TASK	DESCRIPTION	GROUP NAME	SCHEDULE NAME	FREQUENCY	LAST RUN	NEXT RUN	STORE	ENABLED	CHAINED	ADDE
<input type="checkbox"/> Category Sales Report			AAA_Monthly11111	Daily	07/17/2020	07/18/2020	Auburn Store	<input checked="" type="checkbox"/>		Ria Castelli
<input type="checkbox"/> Intake Category Summary Rep...			1234567890123456...	Daily	07/16/2020	07/19/2020	Auburn Store	<input checked="" type="checkbox"/>		Meghana C
<input type="checkbox"/> Intake Rates Summary Report		A_atest1L_group2	AAA_Daily1sxacc	Daily	02/05/2020		Auburn Store	<input checked="" type="checkbox"/>		Ria Castelli
<input type="checkbox"/> Register Closures Report	Daily Task		Lamtest	Daily	07/16/2020	07/17/2020	Auburn Store	<input checked="" type="checkbox"/>		LisaMPN

You can now drill down into the details of the tasks by selecting the hyperlinks to open the following screen. You can now make changes to the report parameters. Currently, you can only make changes to reports.



< BACK TO SCHEDULING

Edit Report Parameter

Group by

Store

Store Auburn Store

Top Category

Skip items in excluded categories

Period and Email

Please select the period type to be used when this report is run as a scheduled report and the email to which the report should be sent.

Select Period *

Current Date

Select Format *

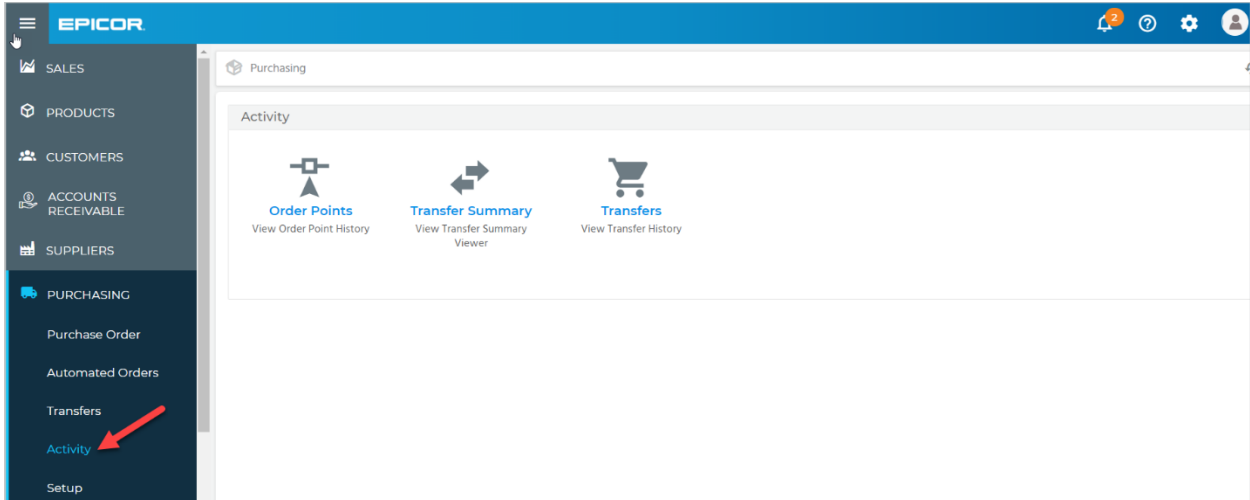
PDF

Users to Email *

CANCEL UPDATE

Transfers

- You can now easily access the Activity menu from the hamburger menu. There is a new icon for viewing transfers history.



- You can now view the transfers history in a grid view.
- You can have a detailed history of a transfer by clicking the transfer number.

Purchasing / Activity / Transfer History

From Store ▾ To Store ▾ Request Date ▾ Shipped Date ▾ Received Date ▾ Status ▾

RESET SEARCH

FROM STORE	TO STORE	TRANSFER #	COST	DISCOUNT	FREIGHT	MISC	TOTAL	ITEMS	UNITS	STATUS
Dublin Downtown	Auburn Store	109-1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	3	0	Completed
Dublin Downtown	Auburn Store	109-2	\$12.00	\$0.00	\$0.00	\$0.00	\$12.00	3	6	Completed
11XX	Auburn Store	108-1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	1	3	In Picking
11XX	Auburn Store	107-1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	1	10	In Transit
AJC branch NO pos ...	Auburn Store	99-1	\$50.00	\$0.00	\$0.00	\$0.00	\$50.00	1	1	Completed
Bealton Store	Auburn Store	98-1	\$385.00	\$0.00	\$0.00	\$0.00	\$385.00	1	2	Completed
AJC branch NO pos ...	Auburn Store	96-1	\$1,500.00	\$0.00	\$0.00	\$0.00	\$1,500.00	1	5	In Transit
Auburn Store	Bealton Store	95-1	\$1.01	\$0.00	\$0.00	\$0.00	\$1.01	1	1	In Transit

EPICOR

TRANSFER 109-2

Transaction # 109-2 Requested Date 07/15/2020 Requested By kidesousa
 From Store Dublin Downtown Shipped Date 07/15/2020 Picked By kidesousa
 To Store Auburn Store Received Date 07/15/2020 Received By kidesousa
 Reference Cancel Date

LINE NUMBER	ITEM	DESCRIPTION	REQUEST QTY	PICKED QTY	RECEIVE QTY	COST	EXT
1	STD10	STD10	3	3	3	\$2.00	\$6.00
2	STD12	STD12	3	3	3	\$2.00	\$6.00
3	STD13	STD13	3	3	0	\$2.00	\$0.00

	Requested	Shipped	Received
Subtotal	\$18.00	\$18.00	\$12.00
Freight	\$0.00	\$0.00	\$0.00
Discount	\$0.00	\$0.00	\$0.00
Misc	\$0.00	\$0.00	\$0.00
Total Transfer	\$18.00	\$18.00	\$12.00
Total Rows	3	3	3
Total Units	9	9	6
Total Weight	0	0	0
Total Cube	0	0	0

Notes

RETURN TO TRANSACTIONS

1 - 3 of 3 items

- View the summary of all transfers by selecting **Transfer Summary** under **Purchasing > Activity**.
- You will have options to see the summary of received transfers in one tab and the summary of in-transit transfers in the other tab.

Purchasing / Activity / Transfer Summary

RECEIVED IN-TRANSIT

Report on Store: r2nativear
 Received Start Date: 7/10/2020
 Received End Date: 7/17/2020

RESET SEARCH

VIEW: TRANSFER OUT | TRANSFER IN

FROM STORE	TO STORE	COST	DISCOUNT	FREIGHT	MISC	TOTAL	ITEMS
		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0

No items to display

Accounts Receivable

You can now easily create an AR statement template using AR Statement Designer in **Accounts Receivable > Setup > Statement Designer**. You will now be able to customize the Payment on Account receipt for both printed and emailed payment receipts.

Categories

- Defining the category hierarchy is now made easy. You can create up to 6 levels.
- In the category maintenance screen, there is an addition of a new filter and column - **Level**.
- The **Category** filter now displays the categories in a tree structure.
- While adding a new category, you have the option to inherit comprehensive parameters from the parent category.
- Store exceptions can be set while editing a category.

To learn more about the features, see [Adding and Maintaining Categories](#).

Payments Tab in Customer Maintenance

Located in Customers > Payments. Displays payment information such as Last Payment Date, Aging History (Number of times and date they were current, 1 – 30, 31 – 60, 61 – 90, and over 90), and Aging by Month (that is In July the customer was 1 – 30 past due).

