

# What's New in Epicor Retail Cloud 2020 R4 SP1

January 2021

Following is a summary of the product enhancements and new functionality available in this release.

## Sales Forecasting

Sales Forecasting enables users to project future sales volumes based on sales history, and those projections can be automatically updated. It has a base set of pre-built sales forecast models that users can edit, or they can devise and use their own models to predict future sales velocities. As the projected sales velocities are calculated, the projected values are stored for the user to view and for other applications to use. For example, Order Points can apply forecast projections to adjust optimum product stocking levels.

Forecasting allows users to increase or decrease the projections, include the desired percentages of promotional sales, transfers, and unusual sales units, and to include or exclude discontinued items, store closeouts, and kits. The forecasting results can be reviewed in a history viewer, as well as in the item record.

## Suggested Orders

Now users can automatically generate a purchase order for items whose stock level has fallen below the order point, or calculate an order based on replenishment (last number of days sales) using Suggested Orders.

Suggested Orders harness the power of Sales Forecasting and Order Points to create Purchase Orders that will keep products in stock based on optimum stocking levels derived from forecasting of past sales for the upcoming periods.

Easy-to-use plan setup allows users to select a group of items by Supplier and Category, as well as by Ranking category. User-configurable settings can enforce economic order quantities by forcing low-cost items into a minimum line cost. Another feature enables users to increase an order by a certain percentage if none of the vendor minimums are met, and to retry a set number of times (Both percentage increase and number of retries are user configurable in each plan).

Suggested Order plans can be scheduled to run automatically or on-demand.

## Special Orders

Merchants can now offer customers the added service of Special Orders. It's easy to create an order and define what information is required. This includes how to keep in contact with the customer during the procurement cycle, whether a deposit is required at time of ordering, and the deposit amount. Orders for future delivery or pickup can be created for items not yet in stock.

Customizable setups include Customer Information required on transactions, setup for Deposits with available tiers, and choice of customer types.

Users will be able to create blended transactions from the same screen, at the same time, which can have lines for sales, orders, and special orders. This allows over-the-counter purchases to be paid, as well as deposit collection for future delivery items.

## eCommerce Integration

Now more than ever, eCommerce capabilities are essential for retail success. This turnkey integration provides a user-friendly configuration for the most common BigCommerce® workflows.

BigCommerce is one of the best and most widely used eCommerce platforms for small retailers. Merchants can quickly, easily, and affordably integrate their online store with Epicor Retail Cloud and start selling.

The BigCommerce integration is an add-on purchase option, so users subscribe to the integration within their Epicor Retail Cloud tenant. Users who don't already have a BigCommerce eStore need to subscribe and set one up. To authorize and activate the integration, the user needs to generate API credentials in their BigCommerce account and add them to their Epicor Retail Cloud account.

## Gift Cards

A new setting, called Allow, using in-store Legacy Gift cards, has been added to enable using legacy cards.

A new gift card type called Local - Legacy Gift Card has been added. These cards do not have bin ranges. They are either scanned or manually entered in POS tendering. These are mostly manually entered and can be scanned by a barcode scanner. You cannot create new gift cards with this type. These cards can only be redeemed or cashed out. You can also add funds to the card.

Users can import the gift card details using the Import Gift Cards option to read the card number and the

## Alternate tender names now display in GL Cross Reference

Instead of listing the alternate tenders by name, the GL Cross Reference would display 'Alternate Tenders' as the tender. This has been corrected and the proper tender name is now displayed.

## "Next" is disabled when entering dual citizenship

Next was disabled when a user entered dual citizenship but did not fill out "Type of Identification" and "US - Issued Number". Those fields are no longer mandatory if the user checks "US Citizen" and "Other (specify)". They are only mandatory if "US" is unchecked and "Other (specify)" is checked.

## Quick Add Is Now Available in Customer, Inventory and Supplier Grid Views

The Add "+" button has been added to the Customer Maintenance, Inventory, and Supplier grid views to enable the quick add of new records. The user no longer must enter the form view to perform an add if their preference is to open maintenance apps in grid view.

## Register Management

Register Type: A new field in register setup will designate whether the new register will be used as a Standard or a Mobile POS register. Mobile registers are available for selection and assignment from within the Epicor Mobile+ POS application while Standard POS registers are made available for selection in the full Web POS.

Active Flag: A new toggle for Active status is now available in register setup so that a user can toggle off a register in order to free up a register count to be able to add a new register if not enough licenses are available. Following current logic, a register would have to be closed and then toggled to not assigned before the Active button can be toggled to False and then properly saved and free up a register count.

## New "No Receipt" Option at Checkout

A "No Receipt" button has been added to POS. If the customer does not want a receipt printed or emailed, the clerk can click on "No Receipt", or press the F5 key on the keyboard.

## Change "Limit Per Transaction" Label in Price Books

ERC Price Book Rule Types of BOGO, Bundle, and Totals Discount have a field on the Rule Header called "Limit Per Transaction" which is slightly misleading to the user. The value placed in that field actually means the number of times that the rule will run within a given transaction. Therefore, we have changed the label to read "Max Times to Apply Rule"

## Maximum Discount Amount for Percentage Based Discounts

The field "Maximum Discount Amount" has been added to specify a maximum discount for the following rule types: BOGO, Bundle, Promotion Price List, and Container. This is only available for benefits with a discount type of "Discount Percentage" and when the maximum discount amount is set, Point of Sale will limit the discount calculated to that amount.

## New Purchase Order Templates for Receiving a Purchase Order

When a user finalizes a purchase order, they now can print a copy of the purchase order. On previous revisions, there was a link to receive and print, but it was disabled. Users may also define their desired fields to be included on the receiving copy of the purchase order using the PO template designer.

## Product Grid Now Shows Decimal Quantities on Hand

The Quantity on Hand column in the Product Grid now displays a decimal value.

## Report by Store Groups or All Stores

Reports can now be run by Store Groups or All Stores. In the sales reports, located in Reporting > Sales, the fields "Store" and "Store Group" have the selections "All Stores" and "All Groups" available.

## Device Handling, Device Setup

Devices have been removed from Register Setup and now reside under Utilities>Device Manager. This change was made to allow for future use of devices outside of Point of Sale, i.e. Bar Code Scanners and Printers in other applications such as Inventory and Purchasing.

## New FFL Content Manager Form 4473 and Workflow Change

The ATF has released a new 4473 form that became mandatory Nov. 1, 2020. We have updated the e4473 disposition flow to accommodate the changes to the form and it went into effect Oct. 20, 2020.

## Add 'Other' Firearm Type to Acquisition Dropdown

When performing a firearm Acquisition, a new "Other" firearm type has been added.