What's New Eagle Release 30 Transcript

Eagle Release 30 comes packed with new features in areas like Point of Sale, Inventory, Accounts Receivable, Accounts Payable and Security.

Select a topic to learn more about the enhancement included with this release.

Topics

- Point of Sale

- Inventory

- Accounts receivable

- Accounts Payable

- Miscellaneous

- Security

Point of Sale

Eagle release 30 requires a PIN pad software version upgrade.
If the Verify PIN Pad Level Check is enabled on a station, then a prompt displays as soon as Point of Sale (POS) launches.
You will continue to see this prompt until you either upgrade or turn off the verification flag.
We recommend upgrading your PIN pad device software as soon as possible to ensure the latest requirements install.
See online help for instructions on updating Pin Pads.
We created a new viewer that enables you to view all customers that have stored credit cards, debit cards, and gift cards on file.
It's called the Stored Credit Card Viewer (SCV).
You'll need security bit: 690 – Access to customer credit card maintenance (encrypted mode) to use this feature.
You have several ways to access the viewer:
Use the shortcut SCV in the Eagle launch bar.
Choose Stored Credit Card Viewer from the Accounts Receivable menu.
From Customer Maintenance, you can select the Misc/Kpad menu and choose Stored Credit Card Viewer.
Within the viewer, you can look-up by Customer #/Job, Expiration Date, and Thru Date or leave the fields blank to show all stored cards on file.
The Activate Date and Last Used Date columns will show a value if the card is an In-Store Gift Card.
Last Used Date will also show for Credit and Debit Cards.
You can launch the CARD Payments Screen by selecting F3-Drill on the toolbar or double-clicking the row.
You'll need security bit 1156 Access CARD Payments Dialog and option 1345 – Point to Point Encryption on System set to yes to use this feature.
You can delete a credit card from the stored credit card viewer by enabling the check box for the line you want to remove, and then selecting Delete from the tool bar.
Here are a few other things you can do from the stored credit card viewer:
You can change the expiration date of a card while in the viewer by highlighting the record in the grid, then making and saving your update.
You can launch Credit Card Maintenance from the Stored Credit Card Viewer.

All you need to do is highlight the customer in the grid, and then from the Miscellaneous menu, select A – Credit Card Maintenance.

This function requires security bit 690 - Access to customer credit card maintenance (encrypted mode)

You can send a text message to a customer from the Stored Credit Card Viewer.

Again, you would highlight the customer in the grid and open the Miscellaneous menu, this time choosing 2 – Send Text Message to Customer #*11

We added a new field: Last Used to the Credit Card Maintenance Screen to show when the Card that is displayed was last used on a transaction.

We enhanced the POS Open Orders Viewer so you can now filter on columns Special Instructions 1 and Special Instructions 2.

We created new option 3561: Include Additional Fields in POS Total Weight Dialog.

When set to yes, it controls the appearance of these new fields in the total weight dialog in Point of Sale:

Total Cubic Feet which represents the total cubes for all items and quantities posted,

Tallest Item (Height) represents the height of the single tallest item on the transaction,

The Widest Item (Width) represents the width of the single widest item on the transaction, and the

Deepest Item (Depth) represents the single deepest item on the transaction.

In addition, the calculated weight and cubic feet will exclude backorder quantities and comparison logic dimensions will exclude any item posted with zero qty available, such as a voided line or a line with all its quantity backordered.

The system will recalculate accumulative values and make dimension comparisons for greatest size immediately following any change, void, or line item deletion.

The values are based on the inventory record of item being posted.

Lastly, if you're simply adding items, they must all have the same unit of measure as point of sale and POS assumes all units of measure are the same for the sum total across multiple items and when used to determine the greatest size item.

For more information, refer to the What's New documentation included with this release and/or online Help.

Select the right arrow icon to proceed to the next topic, the Home button to select a different topic, or the Exit icon to leave the course.

Inventory

Eagle Release 30 includes these inventory enhancements.

The first is for Physical Inventory Posting.

In the Physical Inventory Posting Grid, you'll notice that the Order Point Column appears as an option when you Select Columns To View.

This offers better analysis into physical inventory.

Another enhancement is for Inventory Maintenance (IMU).

You can now find the Vendor Stock Number as a choice for Option 2001 – Store specific fields to copy to synchronize with other stores (IMU).

For more information, refer to the What's New documentation included with this release and/or online Help.

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Accounts Receivable

We made several updates to Accounts Receivable.

To comply with the California Consumer Privacy Act (CCPA) requirements, we added a feature that enables you to anonymize a customer in Eagle.

The Anonymize Customer feature is available from the Change Customer Number application menu.
Option 1961 – Enable Anonymize Customer Data turns the feature on.
Option 1966 – Anonymize Customer Minimum Days enables you to set a minimum days value between seven and 366 with a default of 90.
Option 1966 also checks the following date fields in Customer Maintenance:
Account Opened, Amount of Last Payment, and Date of Last Sale.
Security Bit 1164 – Anonymize Customer Data defaults to No. Enabling this bit allows access to the Anonymize Customer Data function.

Accounts must meet several requirements before they are eligible for data anonymization.
These include:
No items on account
No POS transactions (Bids, Estimates, iNet Orders, Layaways, Orders, Service Orders, Rainchecks, Special Orders, Transfers, Suspended transactions).
No jobs associated with account.
The Account Running Balance must be 0.
Account Opened, Amount of Last Payment and Date of Last Sale dates must be greater than the minimum number of days specified in option 1966 – Anonymize Customer Minimum Days.

The anonymization function:
clears all customer data fields in the customer record and changes the customer name to Anonymous – NNNNNN where NNNNNN = customer number.
The sort name is changed to ZZZZNNNNNN.
In addition, the function:
Adds all sales data (PTD, YTD, Last Year) to the default cash customer whose store account opened matches the anonymized customers store account opened
Moves Quickrecall transactions to the default cash customer
Deletes all customer contacts, all customer note types, all change log entries including initial snapshots and customer contacts, customer multiple ship-to information, and customer custom SKU's.
We included procedures to anonymize customers within Customer Maintenance in online help.
We updated the AR Aging Report with a new Update Option P – Purge.
On the From/To tab in the Report screen, we added a From/To Range is correct selection when you have option P – Purge enabled.
This helps limit the transactions that may run when the Purge option is selected.
If the selection is set to N (No) with option P – Purge enabled, the system displays a message dialog after choosing F4 – Run if you have not selected a Customer Number or Customer Sort Name.
Setting the From/To selection to Y (Yes) allows the report to run.

This release supports the ability to use your Ingenico iSC250 or Lane Series PIN pads to enter card information in MCR/Credit Card Maintenance for PCI compliant card entry.
If an Eagle for Windows workstation has a PIN pad attached and configured in Device Configuration and Eagle for Windows Option 1613 - Allow barcode scanning in customer maintenance and all of its functions - is set to Yes, the PIN pad is armed and will prompt the user to swipe or manually enter the card when the terminal is running the MCR/Credit Card Maintenance application.

This feature allows for non-encrypted card entry or Epicor transaction security encrypted card entry on the PIN pad.
If Epicor transaction security is enabled on the system, the encrypted card information is passed to the Epicor Payment Gateway, tokenized and returned to the MCR/Credit Card Maintenance dialog where it can be saved to the Eagle server.
If Epicor Transaction Security is not enabled on the system, the non-encrypted card is passed to the MCR/Credit Card Maintenance dialog where it can be saved to the Eagle server.

Assuming they are present in the electronic data on the card, the customer name and expiration date are also passed to the MCR/Credit Card Maintenance dialog.

For more information on these and other Release 30 enhancements, refer to the What's New documentation provided with the release.

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Accounts Payable

We enhanced Vendor Maintenance to include advanced 1099 Category selection and support for printing both 1099-MISC and 1099-NEC forms in the 2020 IRS required format.

Two new types of compensation the vendor can receive are available in the 1099 Category field in the Accounts Payable tab in MVR and RA99 (1099 Report)

8 – Substitute Payments (interest income)

9 – Crop Insurance Proceeds

RA99 will now be able to use these new categories.

Note: If a vendor is set to either of the new categories and has been paid $600.00 or more in 2019, the vendor will have a 1099-MISC form print with the amount in the defined field.

1099 Category 7- Non-Employee Compensation is still available for both Vendor Maintenance (MVR) and RA99.

In RA99, it displays as Non-Employee Compensation Form.

Note: For Vendors that have Category 7, use the new 10099-NEC form when printing a report.

If the RA99 is set to 1099 Category = blank, and the 1099-MISC Form is used, any Vendor set with 1099 Category 7 will not print.

You can now process Purchase Orders received by electronic invoice, either by ERP or EDIRP, through the AP Assist Processing Viewer (APA).

When you receive a purchase order electronically, the vendor may send the invoice data that updates the purchase order receipt and A/P voucher, which prevents the ability to process an invoice through AP Assist.

Business's that receive purchase orders electronically and who have AP Assist now have the option to allow or not allow the electronic invoice to update the purchase order receipt with invoice data.

New Option 1985 - Update PO with Invoice Number from ERP? has been added for those with Option 1704 - AP Assist Import on System? enabled.

With Option 1985 set to Y – Yes, the electronic receipt posting (ERP) will not add any invoice data to the purchase order during the initial receipt.

If you also have Option 3232 - Enhanced EDI invoicing (EDIRP) on System? enabled, Eagle will continue to generate a regular voucher for purchase orders received through EDIRP and are within threshold.

The regular vouchers will include all invoice data so it can be processed through A/P.

If the purchase order is outside of threshold, no invoice data will be included in the purchase order receipt so the invoice can be processed through AP Assist.

We enhanced the Accounts Payable feature that requires manager approval for all selected invoices prior to running the A/P Check Run Report (APCM) to allow flexibility to only require approval for vendor invoices setup for ACH and/or vendor invoices setup for live checks.

Adding this option provides additional security to allow live checks to print without requiring approval but prevents APCM for ACH processing until management approved.

When Option 9007 - Require A/P Check Run Approval is enabled, the Approve button is visible in AP Invoice Maintenance and Payment Viewer (APMU).

A user who has security bit 883 - Allowed to Approve A/P Check Run must sign in and press this button after invoices are selected for payment and the Check Run Report (APCM) is initiated.

This feature requires new Option 1976 - Which invoices require approval for check runs? to enhance Option 9007 - Require A/P Check Run Approval by setting which type of check will require approval.

The type of check is setup within the bank code as either Check or ACH.

A/P bank codes are setup and configured in Bank Code Maintenance (ABMU).

ACH bank codes are then assigned to each vendor configured for ACH/EFTN following the setup procedures for ACH/EFTN.

When you set Option 1976 to A - All Invoices, each selected invoice in APMU will require approval before running APCM.

When you set Option 1976 to E - Only ACH Invoices, check run approval is required only for invoices setup with an ACH type bank code.

When you set Option 1976 to X–Only non-ACH Invoices, check run approval is required only for invoices setup with a Check type bank code.

If the user does not have the desired invoices approved in APMU, the A/P Print Check (APCM) will display this message:

No valid checks to print in range selected.

For more information, refer to the What's New documentation included with this release and/or online Help.

Select the right arrow icon to proceed to the next topic, the Home button to select a different topic, or the Exit icon to leave the course.

Miscellaneous

Eagle Release 30 contains a variety of miscellaneous enhancements covering these items.

Sit tight and we'll go through the details.

The A/R Transaction Report now supports larger values on the summary page and Total Line in the details page.

It now accepts numbers up to up to 999,999,999.99 (Nine Hundred Ninety-Nine million, Nine hundred Ninety-nine thousand, nine hundred ninety-nine point ninety-nine.).

In the Customer Duplicate Viewer, you'll find new columns for filtering and sorting.

Last Sale along with Dup Last Sale

And

Last Payment and Dup Last Payment

While in the Customer Import Designer, two new fields appear.

Note (Extended Description) and

Note Type (Extended Description Type for Note Types 6, 7, 24).

You may now run the test for the

Credit / Debit pad using an EMV card or contactless.

You can now launch websites directly from the Eagle Browser.

Note that this applies only to links in Zone 2 or 3 of the Eagle Browser view.

The Email Audit by Statements Viewer is now available.

This viewer enables you to record and audit sent emails for purchase orders, invoices that include estimates, Orders, Special Orders, and Statements.

It requires the new Option 1995 – Statements – Email Auditing on System set to Yes, and uses Option 1935 – Number of Days to Keep Email Audit Log history.

The Email Audit Viewer contains these new enhancements:

A new Job Column for the invoices Lookup view, and you can now launch the Email Audit viewer using separate links in eBrowser for each of these areas: Purchase Orders, Invoices, and Statements.

For FFLCM, two new Firearm Types appear in the firearm Type Selection. T – Rifle/Shotgun, and Z – Other.

You can find a new column, Quantity on Order (QOO) in the Item List Maintenance Viewer while selecting columns to view.

POS Flex Labels now supports Service Order Service Descriptions.

Note that when setting up the label to print multiline descriptions, you'll need to use the wrap text feature to enable the description to print completely within the desired label area.

For RICU – Item Code Update and RCCU – Customer Code Update Report, the verbiage was updated to help alert users that correct field values and the from/to range selection criteria is critical before running the reports.

You can find more detail on this in Online help.

You can use a new import option in the Inventory Transaction Viewer (ITR) for adjustments using a csv file. This is only for use this with the lookup by SKU.

This feature requires Option 1979 – Unusual Usage Import to ITR from CSV – Only show if Opt 3097 = Y ,
Sec Bit (MSE 754 POS Ability to enter unusual usage),
and
E4W 3097 System Unusual Usage on System set to Y.

For more information on these and other Release 30 enhancements, refer to the What's New documentation provided with the release.

Select the right arrow icon to proceed to the next topic, the Home button to select a different topic, or the Exit icon to leave the course.

Security

Eagle release 30 adds a new security bit:

1165 – Allow Manual Gift Card entry in Alternating Tender Gift dialog

This is the last topic in the What's New in Eagle Release 30 course.

Select the Exit icon if you're ready to close the training-on-demand or select the Home button to review other topics.

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