

What's New in Eagle Release 33

Eagle Release 33 brings several enhancements to enable an improved experience for you and your customers.

The R33 version has enhancements in Point of Sale, Inventory, Accounts Receivable, Purchasing and Receiving, and More.

Objectives

- Point of Sale
- Inventory
- Accounts Receivable
- Miscellaneous

Point of Sale

For Loyalty customers, we added a new Option to control how the Phone Number is displayed on the PIN Pad when entering the Phone Number.

This new option, 2075 Mask Phone Number on PIN Pad, allows you to Mask or Unmask the Phone Number when entering it on the PIN Pad for Loyalty lookups.

Setting this to Yes, the default, masks the phone number when entered on the PIN Pad.

In this example, with option 2075 set to Yes, the PIN Pad shows the entered phone number as all Xs.

Setting this to No allows customers to see their phone number digits as they enter them on the PIN Pad.

In a similar enhancement for loyalty customers, we added a new option, 2080, Mask Email address displayed on PIN Pad for Account confirmation.

This enables the ability to mask or unmask their email address when displayed on the PIN Pad for verification.

For privacy reasons, the system currently masks all but a portion of the email address.

When you set option 2080 to Yes, the default, the system displays the first three characters and all characters after the @ symbol of the account's main email address.

The system does not mask the customer's email address if set to No.

Setting option 2080 to No can help determine if the customer's email address has changed.

Note that this option applies when option 1724, Loyalty Account lookup confirmation on PIN Pad is set to E (Email Address).

We enhanced the ability to add recipients from a list of customer contacts when emailing invoices and receipts from the Invoice Viewer.

As an example, working from the Quick Recall viewer where you selected an invoice or receipt and the option to Email it to the customer from the Invoice Viewer Miscellaneous menu, the system opens an Email Invoice window where we added a new Contacts button.

Selecting this button opens a popup window with a list of customer contacts and their email addresses.

When you enable the check box for the contact you want to receive the document and select OK, the system adds their email address to the Selected Contacts list on the Email Invoice window.

You would then follow your normal procedure to identify the email format before choosing OK.

Note: If you do not select a customer using the Contacts button, the system sends the document to anyone previously setup as points of contact for this customer in MCR.

When a customer returns to your store for more paint, it is helpful to have a reference of the tint formula used in their original purchase.

To facilitate this, we added a new option that requires users to add a tint formula for Tally T paint SKUs.

The new option is 2079, Require a Tint Formula on Tally T-Paint Items Sold at POS.

The default setting is No.

With option 2079 set to Yes, when the Enter Tint Formula window appears, the system requires the user to enter a tint formula or a predefined ID in the text box.

Selecting Cancel prompts the user to confirm they do not want to enter a tint formula.

Inventory

We added a new column for Manufacturer Part Number in the Lists Maintenance Viewer.

This column displays as Mfg Part # in the grid.

We added a new column, Last Physical, in the Label Manager window that displays the date of the Last Physical Inventory.

Use this column for additional filtering and analysis.

We also added the Last Physical column to the Item Price Changes Viewer which provides another reference to the last physical inventory date.

We enhanced Label Manager with a new Store Closeout column in the grid. This column displays the store closeout setting for the selected SKU.

You can use this column for additional analysis when viewing items to print in Label Manager.

Accounts Receivable

We made it easy to choose contacts when emailing payment receipts by adding a Contacts button to the Email Payment Receipt window.

Once you select a receipt and the option to Email it to the customer from the Miscellaneous menu, the system opens the Email Payment Receipt window.

Selecting the new Contacts button opens a popup window with a list of customer contacts and their email addresses.

When you enable the check box for the contact you want to receive the document and select OK, the system adds their email address to the Selected Contacts list on the Email Payment Receipt window.

You would then follow your standard procedure to complete the process.

The system acknowledges the action with a confirmation message: Payment Receipt sent via email to customer.

We added a new Category Pricing Plan Import option, option 2083, which enables creating a .csv file for importing one or more Category Price Plans.

The Import will add the plan to the file, but it will not auto-assign it to any customers.

The system will not support updates, but you can add new categories to an existing plan provided the CSV file lists the correct plan name (ID) and the category does not already exist within that plan.

To use this feature, you must set option 2083, Category Pricing Plan Import, to Yes to enable access to the import utility.

You must also set security bit 1175, Access Category Pricing Plan Import, to Yes for each user with the authority to import Category Price Plans.

Miscellaneous

We added a new column, Average Cost to the Pending Transfer Viewer.

This information gives you more data when analyzing each item's average cost.

We enhanced document scanning by adding a new document type, Card on File Agreement to the Document Type options in Document Attributes.

When scanning or importing a document, you can choose the Document Type for the document you are scanning or importing.

Once archived, you can filter for it within the Document archive viewer.

Note: To use this feature, you need to set security bit 921 – *Document scanning feature – Access confidential customer information*, to Yes.

Resources

For more information on this release, please review the following resources:

- Epicor Learning Center
- Help documentation found within the system.
- The Eagle What's New Release 33 Features Documentation.

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