# What's New in Propello 2024.3

Propello Release 2024.3 brings new features and enhancements that help you manage your business more efficiently. Propello 2024.3 includes enhancements in

*Buyer's List*

*Ability to add Multiple credit cards for a customer account.*
*Physical Inventory & WIS/RGiS Import & Report Export*
*Text Messaging/Text Receipts from POS* and more.

Stick around to learn more.

Let's start with the **Buyer's List.** Normally, an order clerk or cashier creates orders and special orders. Now with the Buyer's List, a buyer can perform this function. This gives Purchase Managers full control over the purchase process. Additionally, buyers can use the Buyer's List as a to-do list.

Now you can set a default supplier for all Buyer's List items in Organization Maintenance. Use the Default Supplier for Buyer's List drop-down menu to make your selection.

Now, you can add items to the Buyer's List from POS directly using the special-order flow. When you select **Special Order** as your transaction type, a new **DEFAULT SOURCE** pop-up will appear, allowing you to easily add items to the Buyer's List.

With this feature, choosing the **Buyer's List** from the **Source** drop-down automatically populates the **Supplier** drop-down with your selected default supplier, streamlining the process.

You can also select your preferred shipping method from the **Ship Via** drop-down menu.

As you add items to the Buyer's List, a banner appears below the items to let you know that the item is added to the Buyer's List.

You can also highlight an item from the posting screen to edit the Sourcing Information in the right-side panel.

And for new items that aren't in your inventory yet, you can easily use a Special Order or Buyer's List template to add them.

Once you add items to a Buyer's list, buyers can access the list from the buyer's list module. You can add Buyer's List items to a purchase order using the **Add to PO** button in the Buyer's List grid.

With this release, you can add multiple credit cards to a customer account and mark a credit card primary for **Point of Sale** and **Payment On Account.** This helps your customers with faster transactions.

They can make repeat purchases without re-entering card information each time, simplifying checkout and reducing friction.

You can add, edit, or delete multiple credit cards for both Main and Job accounts. Each account's credit card details are stored separately and used accordingly during transactions. You can also mark a card as Primary for **POS** and **POA** by selecting the **Actions** menu.

We've enhanced the *Import and Export of Physical Inventory* feature, allowing you to export physical inventory data from one or more stores. This data can then be used to easily import inventory data to streamline your inventory management process.

Now, you can select the **Export Items from Physical Inventory** option from the **Action** Menu, allowing you to choose multiple stores for exporting inventory data.

Importing Physical Inventory helps you acquire data from third-party companies. You can also import it into the Physical inventory grid. To import data, select the **Import Physical Inventory** option. This feature requires the **Allow Physical Inventory Import** permission.

With the new enhancement, you can now send receipts or invoices via text directly from POS or the Transaction Activity Viewer. This makes it easy for customers to access, download, or save their receipts on their mobile devices.

You can set up a default message to send along with these receipts or invoices. You can also send SMS receipts to customers directly from the payment screen by entering the customer's phone number in the **Mobile Number** field.

If the number is available from the customer's contact record, it appears masked, showing only the last four digits for verification. You can edit this masked phone number as needed.

While editing any transaction, you can send an SMS with a receipt or an invoice link directly from the Transactions section. The **Phone Number** field populates with the customer's primary account phone number. You can enter a new number if needed.

Use the **Receipt/Invoice** toggle button to select whether to send a receipt or an invoice link through SMS. Additionally, you can send custom text messages by typing up to 60 characters directly in the **Message** field.

Depending on your selection, the SMS includes a link to the receipt or invoice, which the recipient can download or print.

You can also access this feature in **POS** by selecting the Customer icon, and then choosing one of the **Last 5 Invoices**.

Refer to the Propello 2024.3 What's New document from the help menu for more detailed information on all the new features and enhancements added to this release.

## 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.

**EPICOR**

| **Corporate Office** | **Latin America and Caribbean** | **Europe, Middle East and Africa** | **Asia** | **Australia and New Zealand** |
|---|---|---|---|---|
| 804 Las Cimas Parkway | Blvd. Antonio L. Rodriguez #1882 Int. 104 | No. 1 The Arena | 238A Thomson Road #23-06 | Suite 2 Level 8, |
| Austin, TX 78746 | Plaza Central, Col. Santa Maria | Downshire Way | Novena Square Tower A | 100 Pacific Highway |
| USA | Monterrey, Nuevo Leon, CP 64650 | Bracknell, Berkshire RG12 1PU | Singapore 307684 | North Sydney, NSW 2060 |
| Toll Free: +1.888.448.2636 | Mexico | United Kingdom | Singapore | Australia |
| Direct: +1.512.328.2300 | Phone: +52.81.1551.7100 | Phone: +44.1344.468468 | Phone: +65.6333.8121 | Phone: +61.2.9927.6200 |
| Fax: +1.512.278.5590 | Fax: +52.81.1551.7117 | Fax: +44.1344.468010 | Fax: +65.6333.8131 | Fax: +61.2.9927.6298 |