Eclipse Release 8.7.4 Feature Summary

Release 8.7.4

Disclaimer

Epicor Eclipse Release 8.7.4 Online Help Documentation

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Eclipse Release 8.7.4 Feature Summary

The following documentation provides brief descriptions of new or enhanced functionality in Solar Eclipse Release 8.7.4. Each major product addition or enhancement is discussed briefly on its own page. For complete information about new or enhanced functionality, refer to the Release 8.7.4 online help installed with your upgrade by clicking on the links in each topic.

> **Note:** Starting with Release 8.6.7, new features are documented in the Solar Eclipse online help only. If you use Eterm and need assistance with features described in the *Feature Summary for Solar Eclipse Release 8.7.3* document, please contact Eclipse Customer Support using the www.epicor.com/distribution web portal or by calling (508) 778-9151.

Eterm and Solar Indications

This release incorporates changes that are available in Eterm, Solar Eclipse, or Solar Eclipse only. Each feature description includes one or more of the following icons to help you determine which features apply to each interface.

- Eterm - The feature is available in Eterm. If you are upgrading from a previous version of Eterm and are not using Solar Eclipse at this time, you can access the features in the Eterm interface.
- Solar - The feature is available in the Solar Eclipse interface. If you are upgrading from a previous version of Solar Eclipse or are moving from Eterm to Solar, you can access the features in the Solar Eclipse interface. Solar Eclipse licenses are required to use the features in the Solar Eclipse interface.
- UFO Enhancement - This feature may be available in both Solar and Eterm. The User Friendly Organization (UFO) provides Epicor Eclipse with suggestions on how to make Eclipse more user-friendly. In each release, we indicate which enhancements we were able to provide based on those recommendations.

A/P Preview Queue Enhancement

Solar

In Release 8.7.4, you can now access the invoices through the Accounts Payable Preview Queue. After populating the header, you can adjust the column view and select Invoice Image. The column display and includes an image link to the invoice using the standard Image Attachment Viewer or the EDI Invoice Viewer:

- - Opens invoice in standard Image Attachment viewer.
- - Opens invoice in EDI Invoice Viewer.

For more information about the A/P Preview Queue, see *Viewing Payable Invoices* in the Accounts Payable online help documentation.

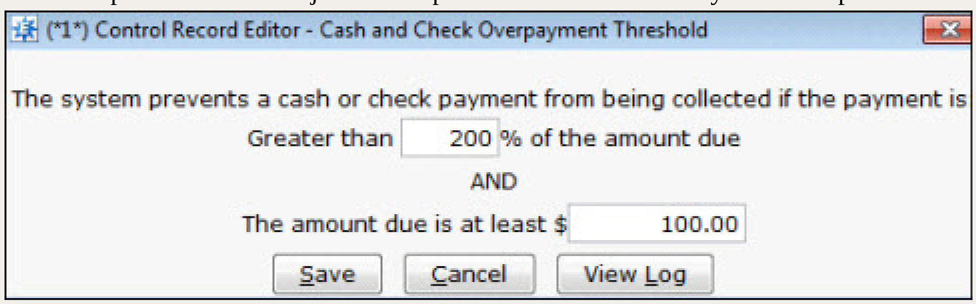
Cash and Check Overpayment Threshold

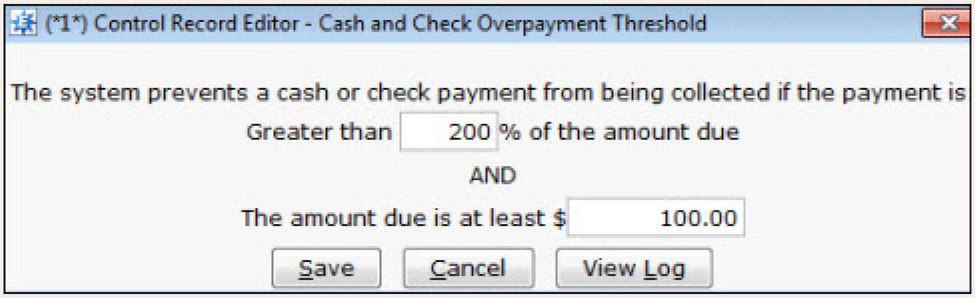
Solar

Set parameters on the cash and check payment field in Sales Order Entry to warn the user if overpayment will occur by applying the currently entered payment. Setting these parameters avoids miss-types, accidental credit card swipes in the cash field, and other payment obstacles.

The system now uses the **Cash And Check Overpayment Threshold** control maintenance record to define the percentage and dollar limit for payments.

> **Note:** This functionality works with standard Sales Order Entry and with Close Counter Order Entry.

Options	Set the upper threshold for the payment by percentage and dollar amount. The two threshold pieces work in conjunction to provide the most flexibility. For example: 
Outcome of setting this control record	Using the example above, if the amount being collected is less than 200% of the amount due, then the user can continue. If the amount due was $500, the user can collect up to $999.99. However, attempting to collect anything over $1000 results in an error on the **Totals** tab. In addition, the amount due must also be at least $100. A customer could pay more than 200% for an order less than $100. For example, if the order total is $5.00, the customer may pay with a $20.00 bill. So by including a minimum amount for the amount due, you can prevent getting an error for these types of transactions.
Warning Message	If the percentage entered is less than 100% (and greater then 0%), the user receives the following message: *Warning! The percentage threshold must be at least 100% of the amount due. Percentages less than 100% will be changed to zero and ignored. Do you want to continue?* If the user were allowed to enter 50% as the threshold, then a user could only collect $250 on a $500 order. Therefore, if the user answers Yes in the warning above, the percentage is automatically set to 0%, disabling this control maintenance record and allowing all payment amounts to be collected. There is no minimum or maximum for the minimum amount due field.
	Additionally, the user receives a notification for any payment over one million dollars in the cash or check payment fields.
Default Value(s)	Percentage set to zero. Amount due set to $0.00.
Action if set to Null	Same as if set to **No**.
Additional Information	There is no authorization key connected to this control maintenance record.

Options	Set the upper threshold for the payment by percentage and dollar amount. The two threshold pieces work in conjunction to provide the most flexibility. For example: 
Example Threshold	Use the **Example Threshold** area to see what the maximum payment would be for a specific entry. You can check the amounts before applying in this field.

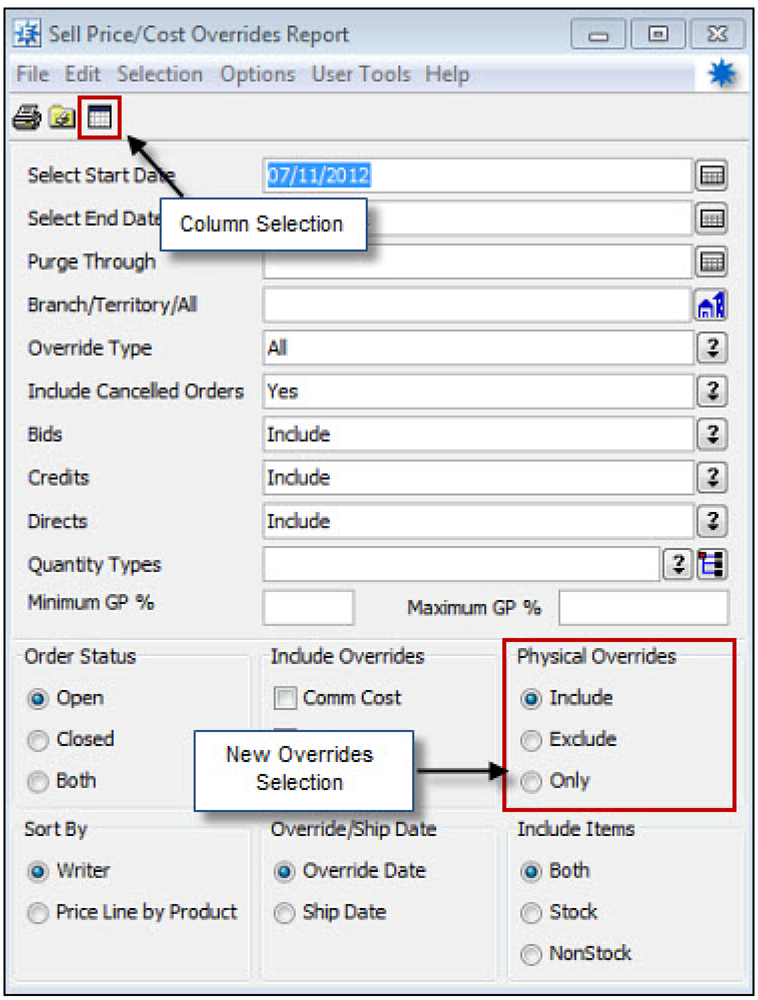
Cost/Sell Overrides Report Enhancements

Eterm Solar

In Release 8.7.4, the Cost/Sell Overrides Report has been enhanced to include selections to track physical overrides on reports: you can separate reporting on standard manual overrides created in the system based on system parameters and physical overrides in which a user manually types over the original sell price or cost on an order. This change also applies to any cost change: COMM-COST or COGS. With these enhancements you can show your sales staff how much you are losing when reducing the selling price to the customer. You can also show the gain when the values are increased.

In addition, the output of the report has been changed so you can see the details more clearly. Prior to Release 8.7.4, the system stacked information in the **Description** field and for longer reports, this information was harder to read. Each value now lives in its own column. You can use the standard Column Selection logic to alter the columns to select which columns you want to see on your report. The system saves your settings.

> **Note:** If you have a phantom scheduled for this report, you must cancel and reschedule it after a Release 8.7.4 upgrade.



Column selection logic is user-specific and the system saves your settings. If you want to change the report template for your company, you can use the **Options > Column Selection Template > Company** option to save changes at a company level.

These new selections are also available in Eclipse Reports.

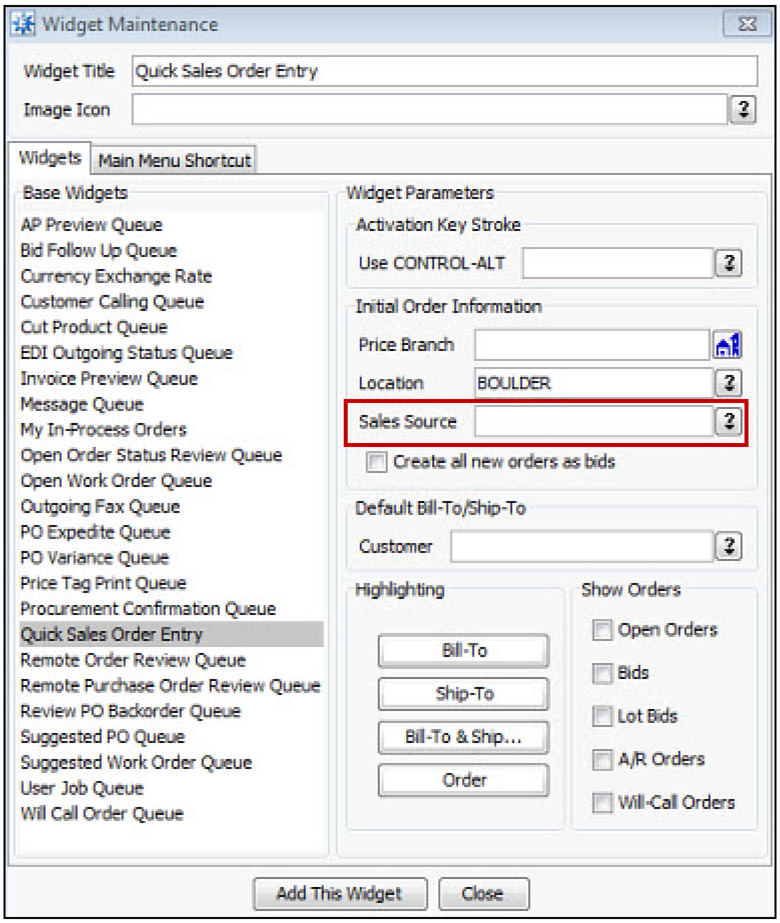
For more information about the Cost/Sell Overrides Report, see *Running the Cost/Sell Overrides Report* in the Sales Management online help documentation.

Quick SOE Widget Enhancements

Solar

The following improvements have been made for the Solar Quick Sales Order Entry Widget:

- For handling bill-to-only orders, the widget prompt for the ship-to customer.
- If the **Sales Source** field is left blank, the system uses standard methods to determine the sales source for the order:



For more information about adding widgets to your Solar main window, see *Adding Widgets to the Widget Toolbar* in the Navigation online help documentation.

Carton Packing Improvements

Solar

Carton Packing is a companion product. Companion products are not included in the core functionality with Eclipse DMS, but are available at an additional cost through your Eclipse Salesperson.

In Release 8.7.4, the following enhancements have been added to the Carton Packing Functionality.

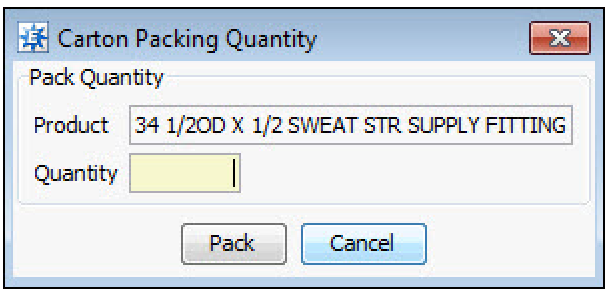
- Control Maintenance Records

  The following new control maintenance records help streamline your packing process.

  - Print Ship Ticket When Carton Packing Completed
  - Carton Packing To Default To Status Screen When Other Totes Staged

- Auto-OK for Quantities

  When prompted for a quantity with the Carton Packing Quantity window, the system accepts the entry with an "understood OK" when pressing return and automatically returns you to the packing window:

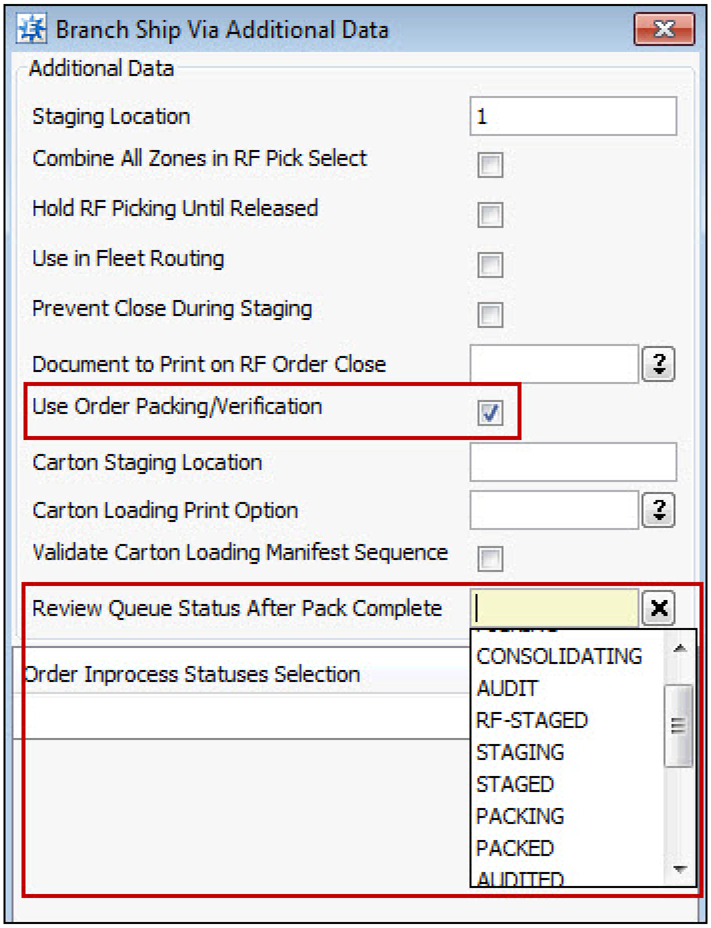
  

- Access from Sales Order Entry

  Eterm: New **Inquiry** hot key on the Sales Order Entry Status screen. Displays the OE Shipment Details Summary screen and Carton Inquiry screen.

- Status of Packed Cartons

  When you select **Use Order Packing Verification** option, you now have a new selection for **Review Queue Status After Pack Complete**. You can select what status to use when the packing is finished, such as *PACKED* or *CLOSE*.



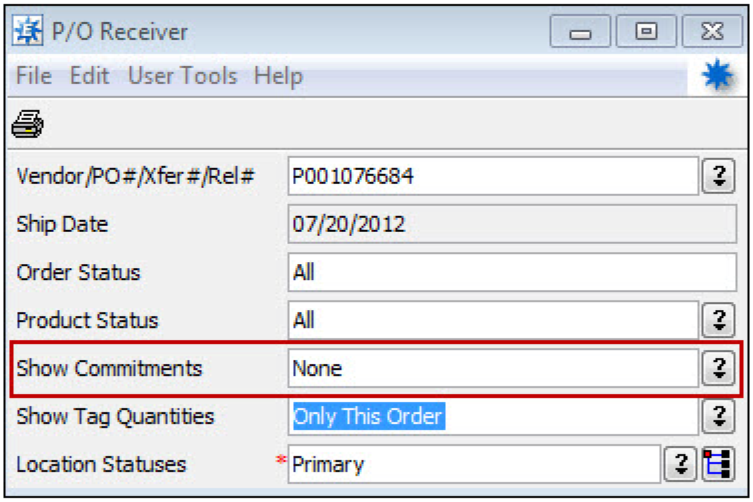
- Manifest Auto-Loading

  When your order is completely packed through Ship Via Maintenance, the delivery information can be automatically added to the order manifest. Use the **Auto Manifest Load** field in Ship Via Maintenance. This functionality now works in conjunction with Carton Packing.

P/O Receiver Report Enhancement

Eterm Solar

In Release 8.7.4, the P/O Receiver Report has been modified to eliminate showing all commitments on the report. A new selection has been added to the **Show Commitments** field: **None -** No sales order commitments will print. For example, if you order in large quantities for a central distribution center, you may not want to print hundreds of commitments on the report. The default is still **All**.



For more information about the P/O Receiver Report, see Running the Purchase Order Receiver Report *Running the Purchase Order Receiver Report* in the Purchasing online help documentation.

Strategic Pricing Online Help

Eterm Solar

Eclipse *online help documentation* has been streamlined, removing duplicate topics, and rearranging the information to make it more user-friendly.

PDW to Web Integration

Web Integration is a companion product. Companion products are not included in the core functionality with Eclipse DMS, but are available at an additional cost through your Eclipse Salesperson.

You and your web designer can use Eclipse Web Integration to customize your own Internet storefront. Web Integration uses XML as a path to Eclipse DMS to query up-to-the-minute product, customer, and transaction information.

In Release 8.7.4, you can now handle your product data warehouse details. The new **IncludeRichContent** tag causes the processors to check if the product is synced to an item in the PDW database. If it is synced, then the system searches for meta items marked as Display in WOE and returns a RichContentList with those meta items in RichContent tags.

This new tag can be used in the **MassProductInquiry** entity or the **ProductInquiry** entity along with the other Include tags. This tag is optional.

Added Details	Entities Updated
IncludeRichContent.......... Answer **Yes** to include product data warehouse (PDW) information for the product.	**MassProductInquiry** **ProductInquiry**
<IncludeRichContent>Yes</IncludeRichContent>	**MassProductInquiry** (example section) **ProductInquiry** (example section)
RichContentList........... The list of PDW meta items fromt he product data warehouse (PDW) for the product. **RichContentItem......**The rich content details. **Name..........**The name of the PDW meta item. **ID................**The ID of the PDW meta item. **Value..........**The value of the PDW meta item.	**MassProductInquiryResponse** **ProductInquiryResponse**
<RichContentList> <RichContentItem> <Name>MASTER UPC</Name> <ID>24215</ID> <Value>026508109274</Value> </RichContentItem> </RichContentList>	**MassProductInquiryResponse** (example section) **ProductInquiryResponse** (example section)

For more information about Product Data Warehouse, see *Product Data Warehouse* in the online help documentation.

For more information about Web Integration tags and setup, see *Web Integration Overview* and printable documentation in the online help documentation.

Eclipse Reports Enhancements

The following dictionaries have been added and are available for use in Eclipse Reports.

Report Source Additions:

Dictionary Item / Report Source	Description
Open Orders/Bids	Added customer part number dictionary.
General Customer Information	Added Default/Bill-To Credit information.
Checks/Disbursements	Added folders for Vendor, Vendor Class and Entity Notes.
General Product Information	Added the Product Budget Group ID
Product Sale Detail	Added the dictionaries listed in the table below.
Open Sales Orders / Bids - Line Item Information	

Dictionary Item Additions:

Dictionary Item	Description
SPRC_CATEGORY	Strategic Pricing Category. Increased length of Customer File dictionary to 15 characters to match control file length.
ER_PRC_MAN_OVRD	Price Manual Override Flag. (1 = Manual Override; Null = Re-Priced)
ER_COGS_MAN_OVRD	COGS Manual Override Flag (1 = Manual Override; Null = Re-Priced)
ER_COST_MAN_OVRD	Comm-Cost Manual Override Flag (1 = Manual Override; Null = Re-Priced)
ER_PRC_ORG_MATRIX_ID	Original Price Matrix ID. The Matrix ID from the original matrix used for the unit price.
ER_PRC_ORG_MATRIX_BR	Original Price Matrix Branch. The branch or territory from the original matrix used for the unit price.
ER_PRC_ORG_MATRIX_CLASS	Original Price Matrix Class. The customer class from the original matrix used for the unit price.
ER_PRC_ORG_MATRIX_CN	Original Price Matrix Customer ID. The customer ID from the original matrix for the unit price.
ER_PRC_ORG_MX_CNAME	Original Price Matrix Customer Name. The customer name from the original matrix for the unit price.
ER_PRC_ORG_MTX_SZ_CAT	Original Price Matrix Size-Category. The customer size and category from the original matrix for the unit price. **Note:** This dictionary is for Strategic Pricing Only.
ER_PRC_ORG_MATRIX_GR	Original Price Matrix Group. The sell group from the original matrix used for the unit price.
ER_PRC_ORG_MATRIX_PN	Original Price Matrix Product ID. The product ID from the original matrix used for the unit price.
ER_PRC_ORG_MX_PDESC	Original Price Matrix Product Description. The product description from the original matrix used for the unit price.

Dictionary Item	Description
ER_PRC_ORG_MATRIX_DT	Original Price Matrix Effective Date. The effective date from the original matrix used for the unit price.
ER_CST_ORG_MATRIX_ID	Original Cost Matrix ID. The matrix ID from the original matrix used for the cost.
ER_CST_ORG_MATRIX_ORG	Original Cost Matrix Branch. The branch or territory from original matrix used for the cost.
ER_CST_ORG_MATRIX_CLS	Original Cost Matrix Class. The customer class from the original matrix used for the cost.
ER_CST_ORG_MATRIX_CN	Original Cost Matrix Customer ID. The customer ID, or number, from the original matrix used for the cost.
ER_CST_ORG_MX_CNAME	Original Cost Matrix Customer Name. The customer name from the original matrix used for the cost.
ER_CST_ORG_MATRIX_G	Original Cost Matrix Group. The sell group from the original matrix used for the cost.
ER_CST_ORG_MATRIX_PN	Original Cost Matrix Product ID. The product ID from the original matrix used for the cost.
ER_CST_ORG_MX_PDESC	Original Cost Matrix Product Description. The product description from the original matrix used for the cost.
ER_COST_ORG_MATRIX_DT	Original Cost matrix Effective Date. The effective date for the original matrix used for the cost.
ER_PRC_OVRD_USER_ID	Original Price Override User ID. The user who overrode the unit price on the order.
ER_PRC_OVRD_USER_DT	Original Price Override User Date. The date on which a user overrode the unit price on the order.
ER_PRC_OVRD_USER_TM	Original Price Override User Time. The time of day a user overrode the unit price on the order.
ER_COGS_OVRD_USER_ID	Original Cost-Of-Goods-Sold Override User ID. The user who overrode the COGS on the order.
ER_COGS_OVRD_USER_DT	Original Cost-Of-Goods-Sold Override Date. The date on which a user overrode the COGS on the order.
ER_COGS_OVRD_USER_TM	Original Cost-Of-Goods-Sold Override Time. The time of day a user overrode the COGS on the order.
ER_COST_OVRD_USER_ID	Original COMM-COST Override User ID. The user who overrode the COMM-COST on the order.
ER_COST_OVRD_USER_DT	Original COMM-COST Override Date. The date on which a user overrode the COMM-COST on the order.
ER_COGS_OVRD_USER_TM	Original COMM-COST Override Time. The time of day a user overrode the COMM-COST on the order.

EDI Enhancements

Eterm

Electronic Data Interchange (EDI) is a companion product. Companion products are not included in the core functionality with Eclipse DMS, but are available at an additional cost through your Eclipse Salesperson.

The following items have been enhanced and improved for EDI:

- The sales order change log updates when receiving an 860 Purchase Order Change Request to read *EDI 860 Change Order Received*.
- The correct generation of the change log updates when receiving a 997 Functional Acknowledgement to read *** EDI 997 ACKNOWLEDGEMENT RECEIVED ***.
- All archive documents are now in one menu under EDI Archive Maintenance: **System > System Programming > EDI > EDI Maintenance > EDI Archive Maintenance.**
- Added **Outbound Document Archive** option in EDI Archive Maintenance. You can define standard settings for number of days before archive and control maintenance records for number of months before purge.
- **Print** option updated so you can expand the archive document to view complete entries.
- New testing function added to EDI Outgoing Status Queue. You can display encompassing segments of a test document without transmitting them.
- Display full EDI ID on Trading Partner Maintenance Entry and add **Alt** tag if the ID is an Alternate.
- Add option to set Test indicator in EDI Group Maintenance of Trading Partner Maintenance.

For more information about EDI documentation, see the EDI online help documentation.

New and Updated Authorization Keys in Release 8.7.4

Eterm Solar

There were no new authorization keys in Release 8.7.4.

New and Updated Control Maintenance Records in Release 8.7.4

Eterm Solar

Release 8.7.4 contains the following new and updated control maintenance records:

Control Maintenance Record	New	Changed	Solar	Eterm

Check Branch Authorization for Price Branches on Select Screens
Indicate if you want the system to check for price branch authorization for specific screens.
• **Yes** - System checks for price branch authorization for each of the following windows.
  • Invoice Preview Queue
  • Invoice Preview Queue Widget
  • Inventory History Ledger
  • Purchase Order Inquiry
  • Transfer Register Report (checks the bill-to/ship-to authorization)
If the user is unauthorized for the price branch, then the price branch's data does not display.
• **No** - Does not check the price branch authorization on these windows. This is the default.
	X		X	X

Cash and Check Overpayment Threshold Set parameters on the cash and check payment fields in Sales Order Entry to warn the user if overpayment will occur by applying the currently entered payment. Set the upper threshold for the payment by percentage and dollar amount. The two threshold pieces work in conjunction to provide the most flexibility. Percentage set to zero. Amount due set to $0.00. For example, the control maintenance record could read as follows: "The system prevents a cash or check payment from being collected if the payment is Greater than 200% of the amount due AND The amount is at least $100.00." Although applicable in Eterm, you can only set this control maintenance record in the Solar Eclipse application. For more information, see *Cash and Check Overpayment Threshold* in this document.	X		X	
Carton Packing To Default To Status Screen When Other Totes Staged Indicate which behavior you want when other totes on an order are already staged. If this control maintenance record is set to Yes, when a carton is packed and there are still staged totes or unpacked items on the order then the Pack Status screen is displayed.	X		X	X

Control Maintenance Record	New	Changed	Solar	Eterm
Print Ship Ticket When Carton Packing Completed Indicate if you want to print a ship ticket automatically when a carton is moved to the **Completed** status.	X		X	
Carton Packing To Default To Status Screen When Other Totes Staged Indicate which behavior you want when other totes on an order are already staged. If this control maintenance record is set to **Yes**, when a carton is packed and there are still staged totes or unpacked items on the order then the Pack Status screen is displayed.	X		X	