ECI Release Notes: Version 30.0

Major Features

New Option for Updating Your Login Password

There are now two ways to modify your application password. As before, you can click the Change Password link on the login form, and now you can update your password from the File Menu. See Changing your Password within the Application.

Ecommerce Cash Drawers Manage Online Payments Better

In this release, you can add a new Cash Drawer for each branch to assist in tracking ecommerce order deposits and payments, providing better reconciliation options. To learn more about this feature, see Working with Branch Ecommerce Cash Drawers.

Global Update

Changing your Password within the Application

We have added a new location within the application to change your password.

To change your password in the application:

1. From the Toolbar, choose **File > Change Password**.
   The Change Password box displays.

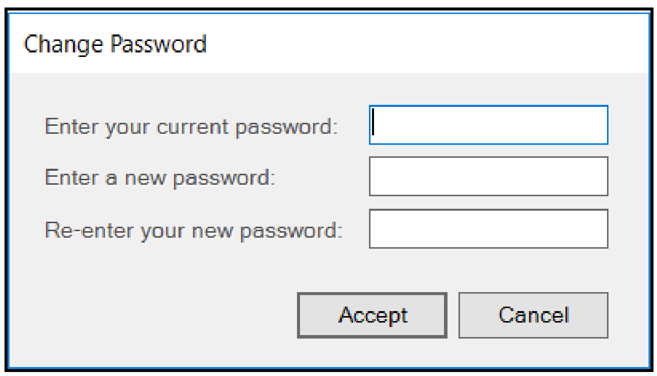

Figure 1. Change Password Box

2. In the *Enter your current password* field, enter your password and press **Tab** to move to the next field.
3. In the *Enter a new password* field, enter your new password, based on the rules established by your system administrator, and press **Tab** to move to the next field.
4. In the *Re-enter your new password* field, enter the same password again.
5. Choose **Accept**.

Working with Branch Ecommerce Cash Drawers

We added new ecommerce-specific cash drawer settings to the Branch records to support the reconciliation of ecommerce payments for order deposits and account payments customers submit online. Ecommerce cash drawers cannot be used for non-ecommerce purposes, ensuring that you can track these amounts in one place. You can assign an ecommerce cash drawer to more than one branch. There are additional error validations to prevent ecommerce cash drawers from being assigned to users (in User ID Maintenance) or to other Stations (in Device Maintenance):

We have tested these settings to ensure that an ecommerce cash drawer cannot be saved by default to another user's station. If someone attempts to add the ecommerce cash drawer to a User ID in User ID Maintenance, and selects **Process (F12)**, an error message displays (as shown below).

Similarly, if you attempt to add an ecommerce cash drawer to a station in the Device Maintenance form, this error message displays:

- *Selected Cash Drawer is set as the Ecommerce cash drawer for branch <Branch ID>*

After the ecommerce cash drawer setup is complete, the application will apply all incoming ecommerce orders with deposits and account and job payments, whether processed manually or automatically, to this cash drawer. This will distinguish the ecommerce payment stream from the in-store cash drawer business. You can use the Cash Drawer Maintenance utility to review these transactions when the process is complete.

Setting up an Ecommerce Cash Drawer

Important: All ecommerce settings must be populated and enabled in the Parameter Settings and the Branch Setup forms before you can set up ecommerce cash drawers.

We added a new Ecommerce Cash Drawer list to the Branch Setup form, allowing the application to track incoming online transactions by branch. You must have branch administration settings to make these changes. Assign an ecommerce cash drawer to each branch that processes all types of ecommerce transactions (automatic and manual). After you create an ecommerce cash drawer, you cannot delete it.

To add an ecommerce cash drawer to a branch:

1. From the Main Menu, choose **Maintenance > Database > Branches**. The Branch Setup form displays.
2. From the *Branch ID* list, choose the first branch you need to add the Ecommerce Cash Drawer for.

3. Choose the **Ecommerce** tab.
   The *Enable ecommerce for this branch* check box must already be enabled for the Ecommerce Cash Drawer setting to display.

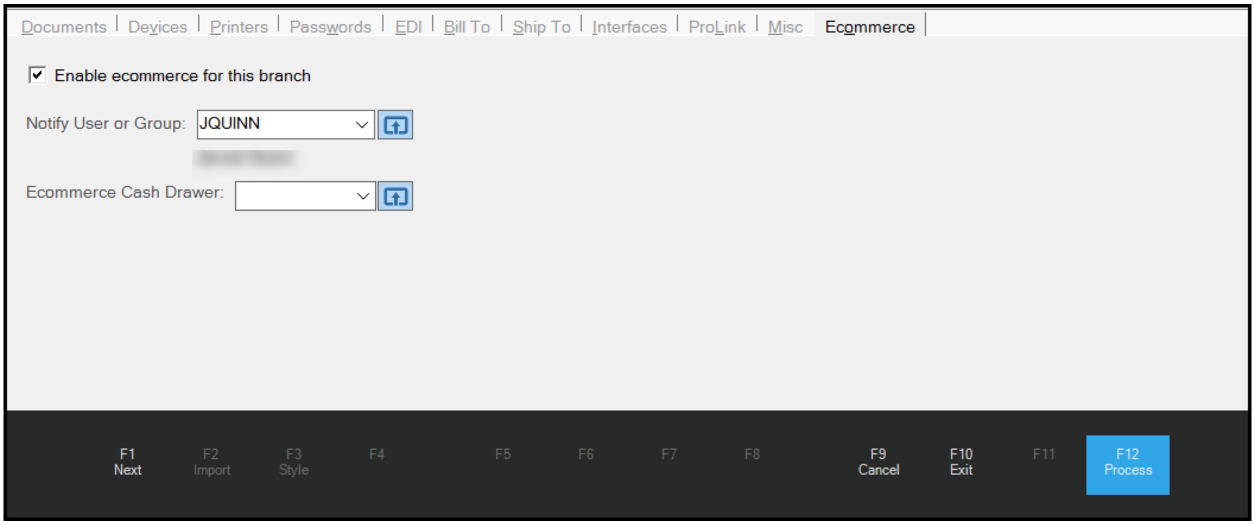

Figure 2. Branch Setup > Ecommerce Tab > Ecommerce Cash Drawer

4. Beside the *Ecommerce Cash Drawer* list, choose the **Settings**  icon. The Cash Drawer Maintenance box displays.
   Note: You can also add the ecommerce cash drawer directly using the Cash Drawer Maintenance form.

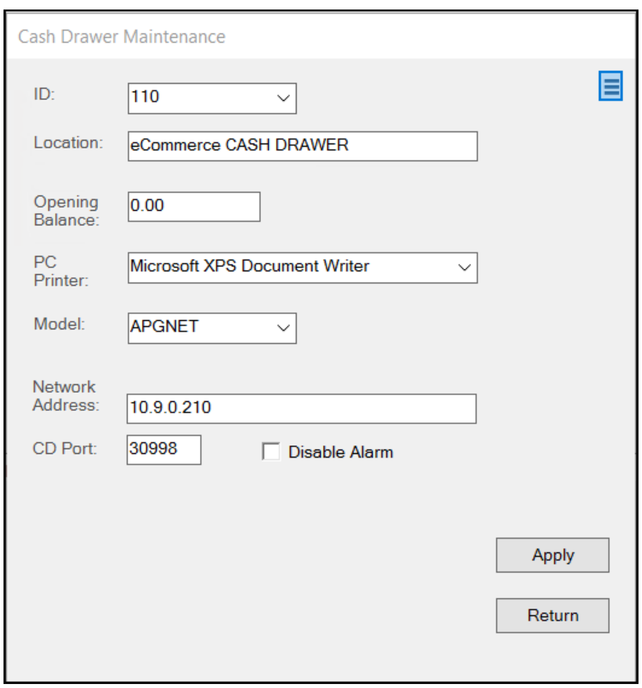

Figure 3. Cash Drawer Maintenance

5. Complete the entries in this box to establish a cash drawer for managing online transactions.
   - *ID*
     Type a new ID number in this field for the ecommerce cash drawer. This must be a unique numeric entry.
   - *Location*
     Enter a cash drawer name that indicates that it is for ecommerce transactions only.
   - *Opening Balance*
     Enter **0.00** in this field.
   - *PC Printer*
     Use this field to specify the printer for the ecommerce cash drawer.
   - *Model*
     Use this field to specify the cash drawer device used to track the transactions.
   - *Network Address*
     In this field, specify the cash drawer's network address.
   - *CD Port*
     This is the port assigned to the drawer.
   - *Disable Alarm*
     Enable this check box to disable the security alarm (the drawer alarm sounds whenever the drawer is opened using the key or by forced entry).
6. Click **Apply** to save these settings. Click **Return** to return to the Branch Setup form.
7. Choose **Process (F12)** to save the new Ecommerce Cash Drawer.

You can also create all of the ecommerce cash drawers you need, using the Cash Drawer Maintenance Utility (*Point of Sale > Utilities > Cash Drawer*). Then you can select them (assign them) to branches individually in the Branch Setup form > Ecommerce tab.

When you complete this new cash drawer record, the application will collect all of the ecommerce payments (account and job payments and order-deposit information) in one place in the Cash Drawer utility. These transactions are organized by session, as they would be in your store.

Using the Cash Drawer Utility to Review Ecommerce Order Deposits and Account Payments

After you set up your Ecommerce Cash Drawer, when a customer submits an ecommerce order deposit or payment (through Spruce eCommerce or using the Ecommerce API), you can review the transaction details using the Cash Drawer utility. You must have Cash Drawer access permissions to perform this review. This process assumes you have created an Ecommerce Cash Drawer and customers have submitted order deposits and or payments online using your website.

To review the transaction in the Ecommerce Cash Drawer:

1. From the Main Menu, choose **Point of Sale > Utilities > Cash Drawer**. The Cash Drawer Handler form displays.
2. From the *Drawer #* list, choose the Ecommerce Cash Drawer ID. The Location updates to reflect the name associated with the drawer.
3. In the *Session Activated* list, choose the session you want to review transactions for.
   The data grid updates to show the transactions received for the selected session.
   The entries for the Ecommerce cash drawer assigned to the current branch display. Since these transactions have already been processed, there is nothing you need to do in this form. Order Deposits and Payments on Account can appear in the same session.

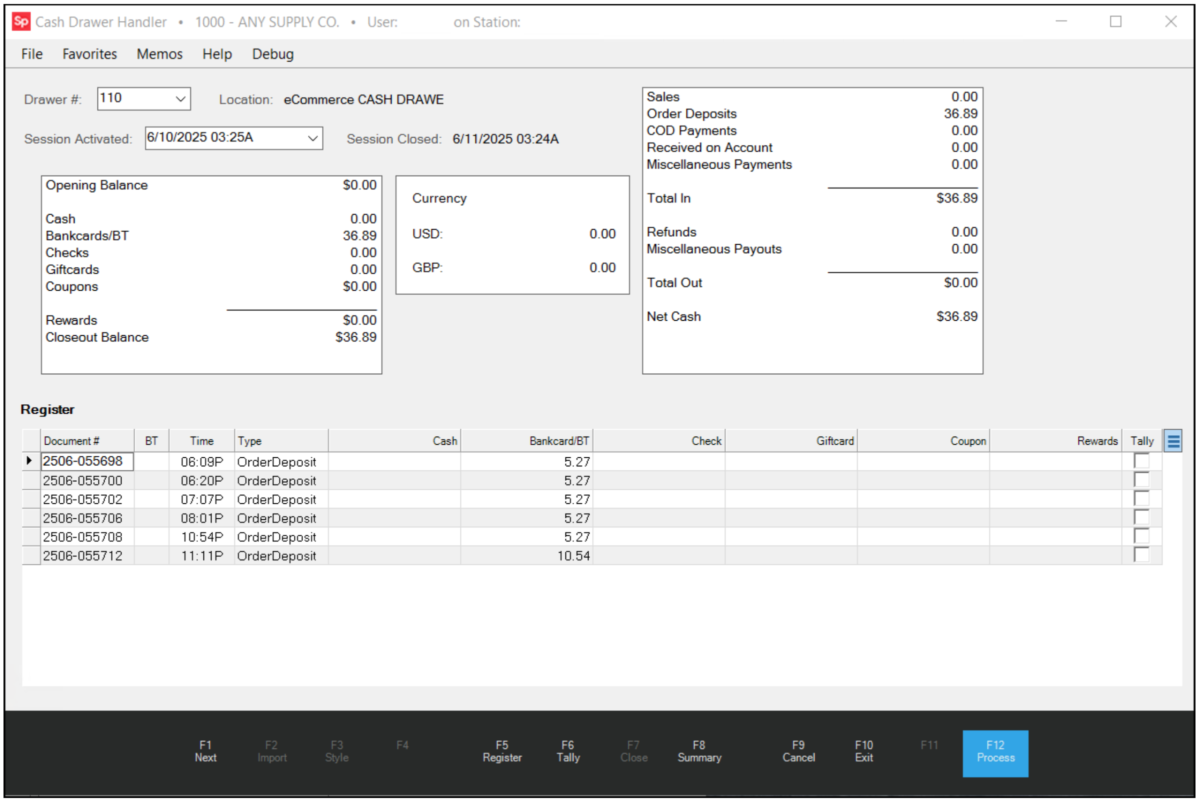

Figure 4. Cash Drawer Handler > Ecommerce Cash Drawer > Order Deposit Entries

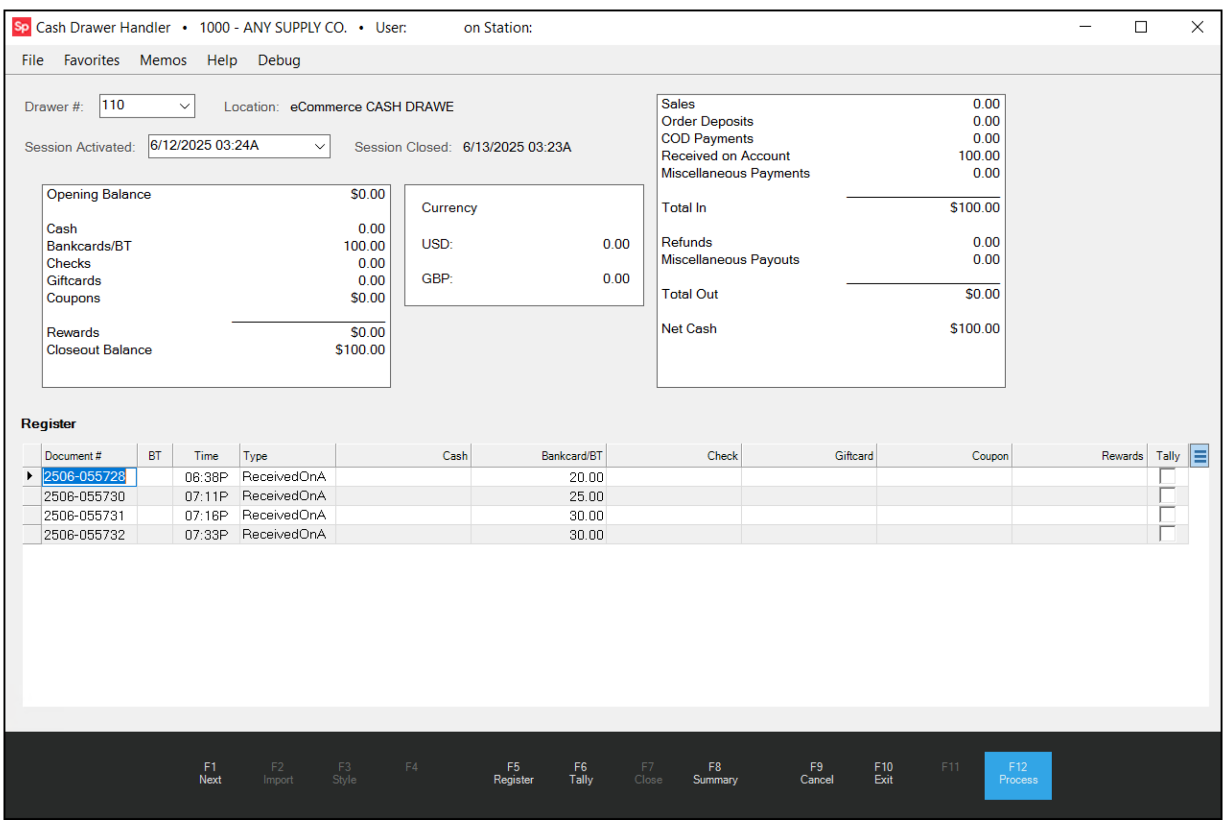

Figure 5. Cash Drawer Handler > Ecommerce Cash Drawer > Payment Entries

Defect Resolutions

ECOMMR-4312 – Closed Jobs No Longer Causing Delays in AccountDetails Requests.

A customer reported that when they had accounts with multiple closed jobs, there was a significant delay in retrieving account data when using the AccountDetails endpoint. We have updated this process to eliminate the retrieval of closed jobs on these accounts, which has significantly improved performance.

ECOMMR-5769 – Credit Limit Review Responsible for Reserve Status Delay.

After some internal investigation, we found that we were not evaluating the customer's available credit limit appropriately when processing incoming online orders. We updated the ecommerce process to review the account's available credit (based on the account's settings) to ensure the consistent calculation of these values. This additional evaluation results in more time that order requests spend in the Reserve status.

LBMHR-487 – Resolved: Unit of Measure Issues when Using the Inventory Import Wizard.

A customer shared that when they used the Inventory Import Wizard, they encountered errors when importing items using some lumber/sheet dimensions. We have updated the import infrastructure to expand the item-type options to include additional lumber, sheet goods, and hardware units of measure, which prevents this issue.

LBMHR-700 – Updates to Billing Entry Recalculate the VAT from Receipts. (Spruce, UK Only).

A UK business reported that when they processed a payable for some receipts, the application sometimes failed to calculate the VAT amount accurately or at all. In these cases, both the items and the vendor records had VAT codes assigned to them. We modified the application's calculation of VAT amounts for receipts to account for partial payments made originally. The application recalculates the VAT amount based on the remaining receipt values and displays a message indicating that the VAT amount may differ from the original calculation. If the application cannot make this calculation reliably, it will prompt the user to enter the VAT amount manually. Manual entry should occur significantly less often.

LBMHR-749 – Unit Cost Rounding Issue in Purchase Orders Updated.

We updated the unit cost calculation for Purchase Orders to use four-digit rounding instead of two. This four-digit decimal point change also displays in the Purchase Order documents in the *Cost* columns.

LBMHR-1027– Consolidated Purchase Order Allocation Issues Addressed

When the *Enable Consolidated PO Pending Transfers* parameter is set, you can create consolidated purchase orders for more than one branch to save on the cost of an order. A customer noticed that when the application created a consolidated order for items of the same type, but for different units of measure, and then manually adjusted the item quantities in the Purchase Order Entry form, the final item quantities were not always equal to the allocated quantities. This resulted in issues where the incorrect item quantities were delivered. We updated this process so that if a user modifies the item quantities for a consolidated purchase order and the allocated quantities do not match the original purchase order allocation, a warning message displays:

- *Over allocated quantities need to be adjusted*.

The application highlights the data in the grid that requires modification and prevents the Purchase Order from processing until the allocation quantities are correct.

LBMHR-1137 – Pricing Update Issue when Switching Items Corrected. (UK, Ex Tax Only)

A customer reported that they had the *Auto Update UM Pricing* feature disabled in their system. However, in Item Maintenance, when they searched for an item by *Description,* looked up the price for the item, and then moved to the next related item, the application applied the pricing from the first item to the second one automatically. If they then processed (F12) that record, the application applied the new pricing to the second item, when it should not have. We have corrected this error. If the *Auto Update UM Pricing* feature is disabled, changing the item UM details no longer occurs when you move from item to item in Item Maintenance.

LBMHR-1139 – Online Orders/Quotes Submitted to Inc Tax Branches Process Correctly Now.

Some online orders submitted to branches with Inc Tax settings received the error messages *OrderTotalError* and *TaxTotalMatchError*. This was due to the parameter tax settings for ecommerce orders, which use a 0% tax rate by default. We now handle this type of transaction using the tax total that is supplied in the original online transaction, which is based on the branch's excluded tax rate. This resolves the error and processes these transactions correctly. All future eCommerce orders and quotes will be imported with the excluded tax rates whether the branch is configured to use included taxes or not.

LBMHR-1355 – Finance Charges Do Not Add Up Error Resolved.

An ecommerce customer reported that when they submitted a CreatePaymentRequest, they saw a PaymentProcessingError that resulted in the message, Finance charges do not add up. While investigating, we discovered a coding error that was causing the issue, which we have since corrected.

LBMHR-1598 – To Improve Security, the Help > About Link is No Longer Live.

If you click **Help > About**, a box displays to show you the version information for the current instance of the application. This is useful for you to know what version of the software you are running. There has been a link in that box that accesses our ECI website, which discusses the application benefits and uses. For security reasons, you will still see this text in this box, and you can copy it into a browser *URL* field, but you cannot link directly to the website from the text.

Figure 6. Help > About with Link to ECI Website Highlighted

LBMHR-1690 – Orgill Images Displaying in Catalog also Displaying in Item Maintenance Now.

Some customers noticed that when the Orgill process retrieved inventory updates including images, the images displayed in the Catalog list but not in Item Maintenance record. We have updated this process to ensure that the images display in both forms.

LBMHR-1691 – Large Quote and Orders No Longer Result in Errors
In the past, when you created a very large order or quote, there were times you received the message:

- *Error Creating Window Handle*

In this case, the application was keeping too many forms open simultaneously. This caused a memory issue that resulted in the error. We have updated the code to close the forms more promptly, which better supports the creation of large orders and quotes.

LBMHR-1698 – EDI Process that Turns Off the Do It Best BOPIS Flag Working Correctly Again.
When you apply the *DIB BOPIS Exclude* flag to one or more items, these items should not display on the Do It Best BOPIS website. We have corrected the issue that prevented this process from working correctly.

LBMHR-1737 – Copying External Text into Non-Stock Item Order Form Allows Fewer Characters.
A customer reported that when worked in the Non-Stock Order form and they tried to paste text from an external site into the form, an error resulted that closed the application. To improve performance, we are now limiting the number of characters you can paste into the Non-Stocked Item Order form to 1088 characters. If you try to paste text longer than that into the form, the text is truncated (reduced) to the first 1088 characters, but it does not error.

LBMHR-1769 – Progress Made in Resolving Out-of-Memory Issues
A business reported system slowness and out-of-memory issues while using multiple different areas of the software. We found that the system was keeping many of these windows open, even when the user completed work in them. We are now closing those windows when the work is done to improve performance and prevent the out-of-memory issues from occurring.

LBMHR-1858 – Regression Issue Resolved: Processing AP Batch Invoice Issue. (Spruce)
A customer reported that when processing ENAP invoices using the AP Batch Process, an error occurred, causing the application to close. The application was

misinterpreting the number of adjustments attached to a transaction, which caused the error. We have corrected this issue.

LBMHR-1860 – EasyAP GL Account Mapping Issues Investigated / Resolved. (Spruce Only)

When working with businesses that use the third-party EasyAP process, we identified an error in the offset account assignment process for one transaction type (Direct Ship POs) and partial payment situations. These errors resulted in some payables not being mapped to the appropriate general ledger (GL) accounts as they had been in the past. We have corrected this issue by using the GL Sequence number to identify the appropriate mapping for these events.

For situations where no assigned GL account exists (or when the transaction type is undefined, or there are discrepancies between the order data and the transactions they link with), we use the discrepancy GL account mapping (Payables Journal Sequence #6).

For the most part, these issues were related to payment documents that were not necessarily tied to orders and receipts, which is the bulk of the work managed by the EasyAP process.

EasyAP is a third-party accounts payable processing tool that allows you to scan bills and payable documents to determine which bills can be paid right away (since there is no discrepancy between the charge and the expected payment) and when there is. This reduces the amount of manual processing required by individuals in your back office. For more information, refer to this Help Topic.

LBMHR-1943 – API Method Updated to Ensure *If Paid By* Amounts Match the Context.

A business reported that when their customer used the Ecommerce API to retrieve their statement, the *If Paid By* amount was different online than when the statement displayed in the application. Upon investigation, we found that the Ecommerce API method, CreatePDFDoc, was not applying the open credits correctly in the context of the request date. We have corrected this issue.

LBMHR-1946 – Payment Process Issues for the FiServ Hosted Payment Page Resolved. (Spruce, UK/AU Only)

Some merchants using Clover or Linkly devices reported issues that prevented the completion of credit card payments using the Manual Payment process. At the end of the transaction, after you chose the Manual Payment option and finished the Spruce process, the FiServ Hosted Payment page displayed, but prevented merchants from continuing after adding the card payment details. We have updated the manual payment process in the background to ensure the payment goes through correctly, and we verified that the credit card information displays correctly on the point of sale documents.

If you are experiencing these issues and are not using a Clover or Linkly device when using the FiServ Hosted Payment page, you still need to complete the following Device Maintenance settings for the station you are processing the payment from. You must be able to edit the Device Maintenance form entries to complete this task.

1. Log in to the station you use to access the FiServ Hosted Payment page, using your administrative permissions.

2. From the Main Menu, choose **Maintenance > Database > Devices**. The Device Maintenance form displays. The *Station* button is enabled by default.

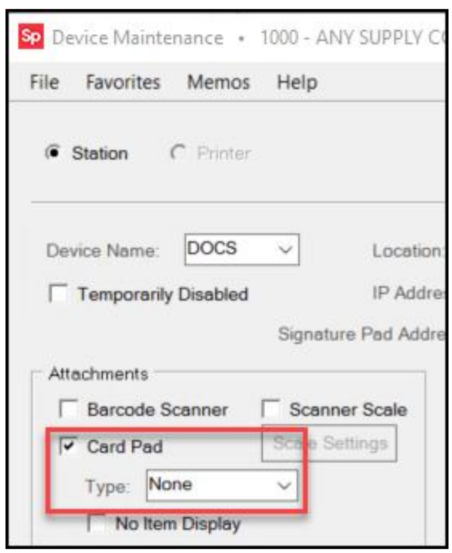

Figure 7. Device Maintenance > Card Pad Settings for FiServ Hosted Payment without Device

3. In the *Attachments* box, select the **Card Pad** check box.
   Make sure the **None** option is selected in the *Type* list.

4. Choose **Process (F12)** to save this setting.

LBMHR-1965 – FanBuilder Coupon Requests No Longer "Spamming" Orgill API.
In the past, when retrieving FanBuilder coupons from the Orgill website, the FanBuilder site was interpreting the coupon request as a call for all accounts that were a partial match for the requested Account ID. We changed our transmission format to ensure that the Orgill website could only interpret our coupon request for one specific account or contact.

LBMHR-1996 – Printing Large Quantity of Labels No Longer Causes Errors.
A customer reported that when they were using the Tags & Labels utility to print a lot of labels (as when creating price update labels), they sometimes saw the error:

- *A request for data from the database server failed this may be due to communications problems*

We identified the issue that caused this bottleneck and have resolved it.

LBMHR-2016 – Corrected: Issue that Prevented the Retrieval of DIB BOPIS Orders.
After the last release, a couple of customers reported that they were not receiving Do It Best BOPIS orders automatically as they were before. We investigated and found that the application was trying to retrieve order data from branches that were not enabled for BOPIS, which resulted in an error. But, because that branch was not enabled, the application did not log the error, but still prevented the retrieval of any of the orders that were created. We made the changes needed to resolve this issue. After installing version 30, the application should retrieve these orders automatically as occurred before.

LBMHR-2123 – Ecommerce API Method Returns Nil Results for Some Terms-Based Posting Fields. When you use the GetAccountBalanceDetail method in the Ecommerce API and you apply it to an account with Terms settings, the application returns a nil (null) result for the DiscountDate and DiscountRemaining fields. For all other account types, the DiscountDate and DiscountRemaining fields should be populated.

LBMHR-2133 – Suspend/Resume Transaction Issue Corrected.
After investigating a customer's request, we found that in some limited cases, the resume process (after suspending a quote transaction) resulted in the application closing. This did not occur if the user selected the Preserve Suspended Transaction. We have modified the code to ensure that this case no longer occurs.

LBMH02-3792 – Online Open Item (Terms) Account Payments Issues Resolved. (SPEC Only)

In response to some customer inquiries, we found that when applying payments to Open Item (Terms) accounts, Spruce eCommerce did not apply the discount amounts that were appropriate for some invoices, which resulted in discrepancies between the payment amount made and the payment amount applied to the invoice balance in the application. We have updated this process to ensure that the discounts are applied accurately to the Open Item Terms account invoices in both Spruce eCommerce and the application.