Important New Changes to RetailEdge 2024.07

Release Notes / Updates · https://retailedge.com/docs/important-changes-to-retailedge-2024-07

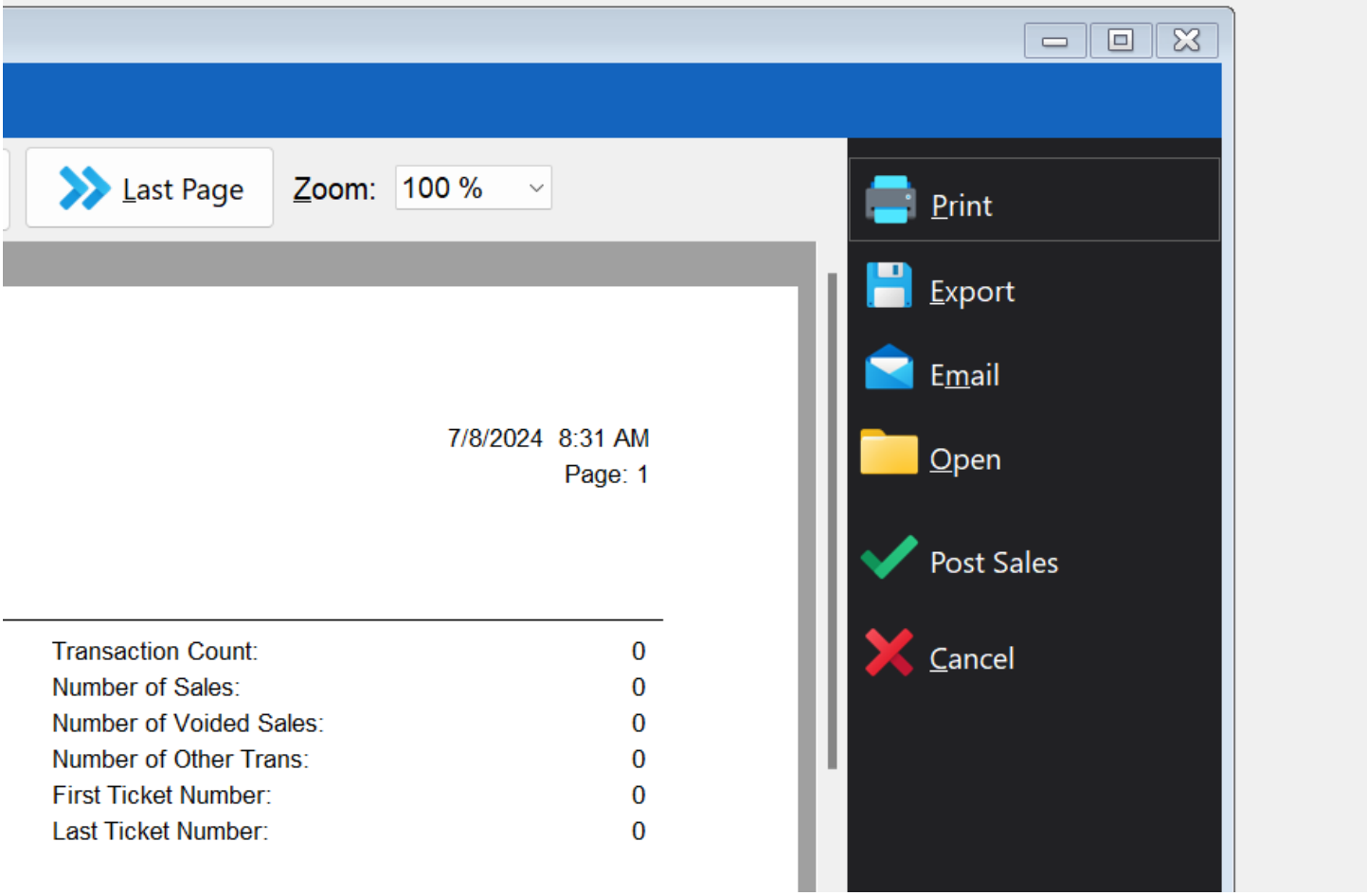
Every RetailEdge update we work very hard to design changes that don't require users to change how they use RetailEdge. However, sometimes we have to move things around a bit to make way for the new features. Version 2024.07 has a few of these everyone should be aware of.

Name Change: RetailEdge 2024.07

RetailEdge has been using 8.2 versioning since 2010. With this release you will see the name change to RetailEdge 2024.07. Going forward we will be using a combination of the year and the month of the release. We have seen a number of users not taking advantage of the updates they are entitled to, or not realizing how far out of date their version of the program is. Hopefully this name change will help you better know when a new version has been released and keep your systems up to date.

Closing Report Screen

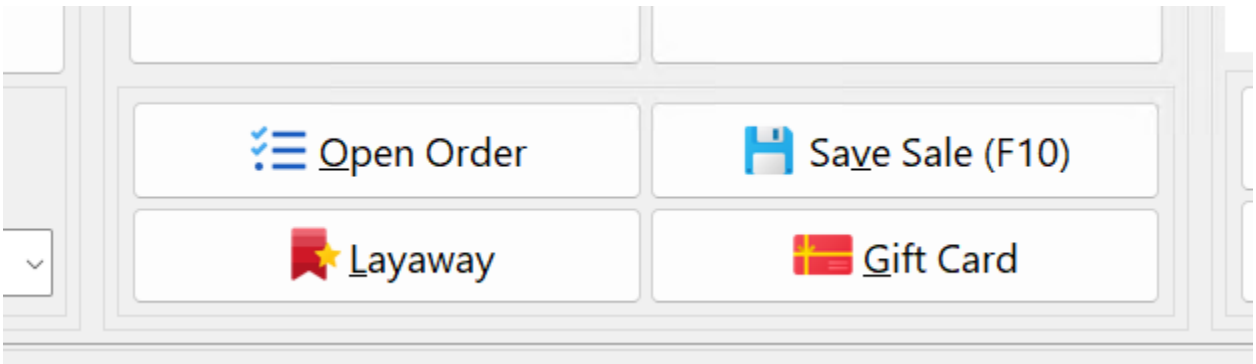
When performing a closing report, you will no longer see an Exit button. We have changed this to **Post Sales and Cancel buttons**, to make it clearer what action you are performing.



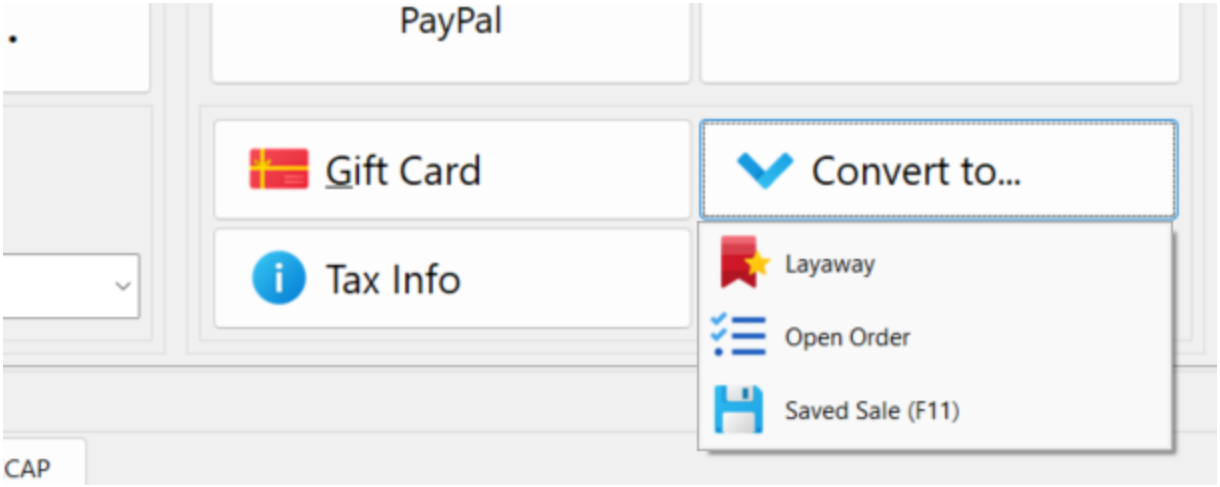
New Convert To Button on Touch Sales Screen

The Sales Screen **Payment Buttons** for **Layaway**, **Saved Sale**, and **Open Orders** have been consolidated under a new button, **Convert to...** This change was required to make way for the new **Tax Info** button that displays the Total Sales and Tax for each jurisdiction AND to allow us to add the ability to take 100% deposit payments on Open Orders the Touch Sales Screen.

Previous



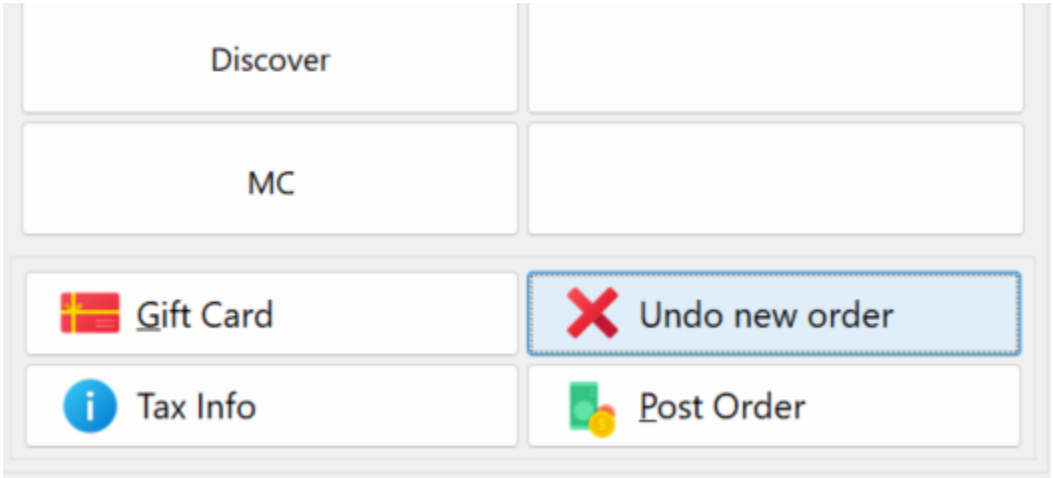
New



Touch Sales Screen Allows 100% Deposits on Open Orders

RetailEdge now allows you to post **100% deposits to Open Orders using the touch sales screen** (it has always had the ability to do it on the traditional sales screen). If you are not posting 100% deposits you can continue to apply the payment and post the open order as you normally would. But if you want to post a 0% or 100% deposit, there is a slight change in how you would do this.

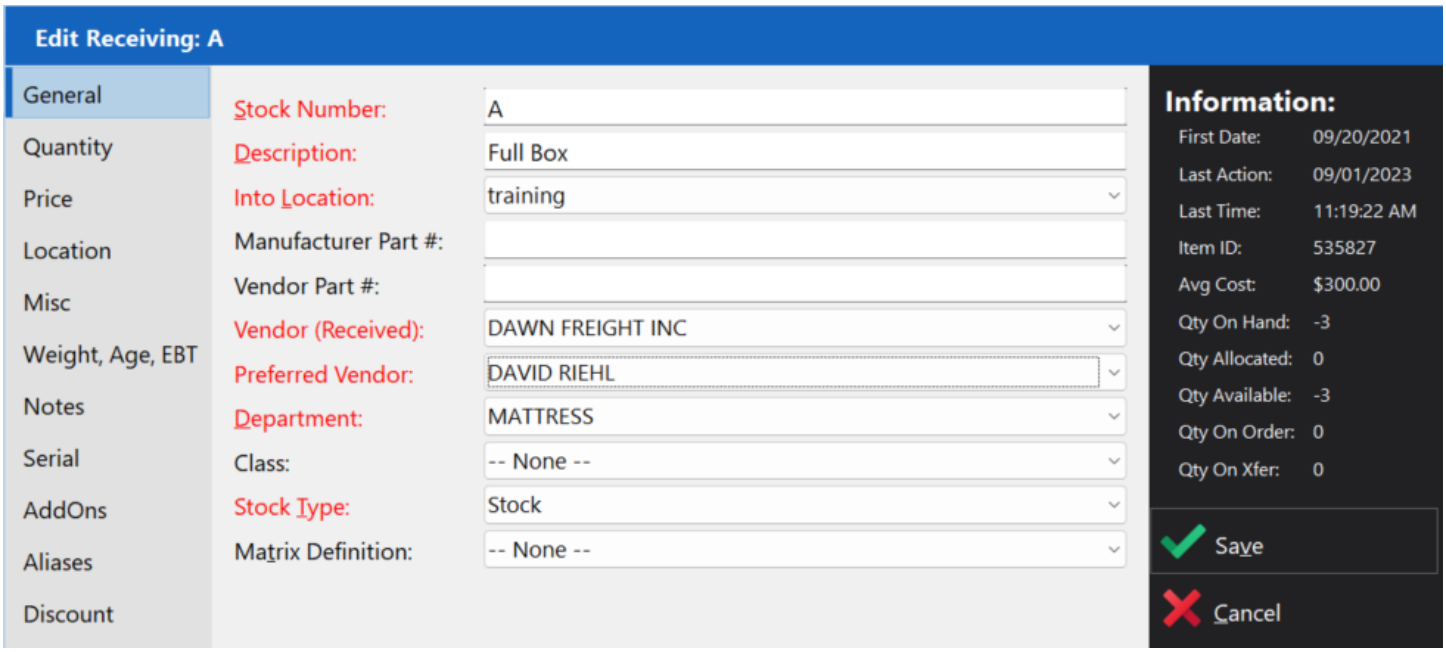
1. Press the **Convert to... > Open Order** button before adding any payments to the sales screen. RetailEdge will then convert the sale to an **Open Order**.
2. Select the payment amount and payment method to apply the amount to the payment grid.
   Note: It can be faster if you press the **Exact Amount** button and select the payment method or double click the desired payment method button.
3. When you are ready to post the order payments, just press the **Post Order** button.



Note: If you need to cancel before you press the **Post Order** button, you can press the **Undo New Order** button, and it will convert the transaction back into a sale.

New Preferred Vendor Option in Receiving Screen

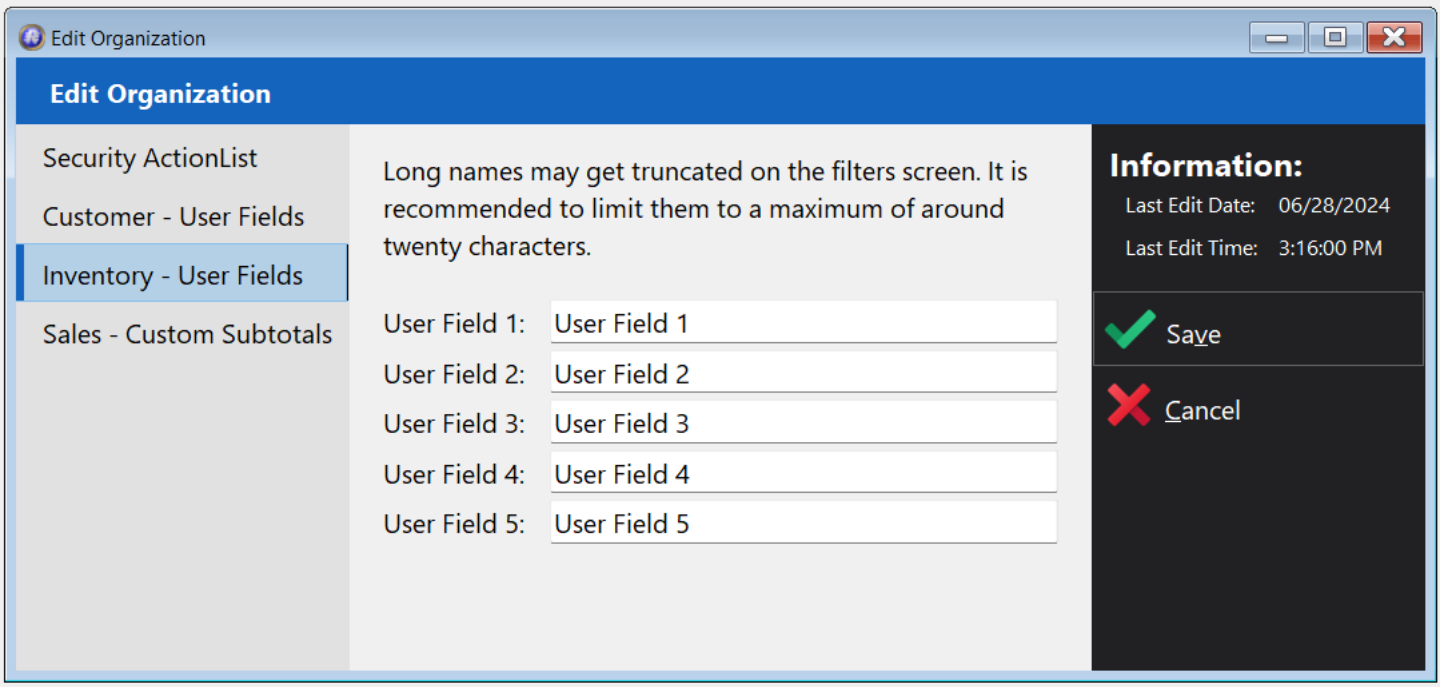
All RetailEdge inventory items have a preferred vendor associated with them. The preferred vendor is used for inventory reporting and is the vendor that gets used for auto generating a purchase order . This preferred vendor does not get updated when receiving from another vendor. RetailEdge now allows you to adjust this preferred vendor during the receiving process. This can be help you maintain your inventory's vendor information when old vendors are no longer available or if you are switching vendors for a particular product. **Note:** You have always been able to change this preferred vendor directly on an item from the inventory manager or when editing an item on a purchase order.

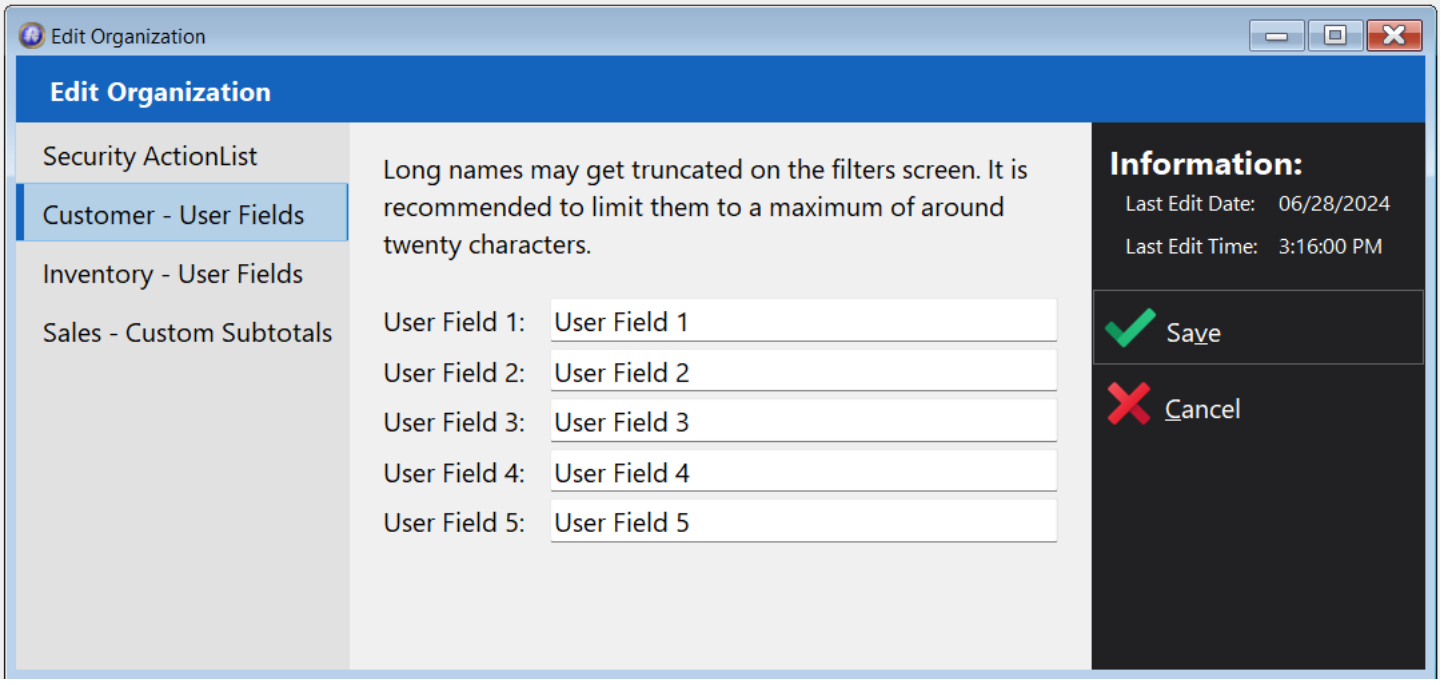


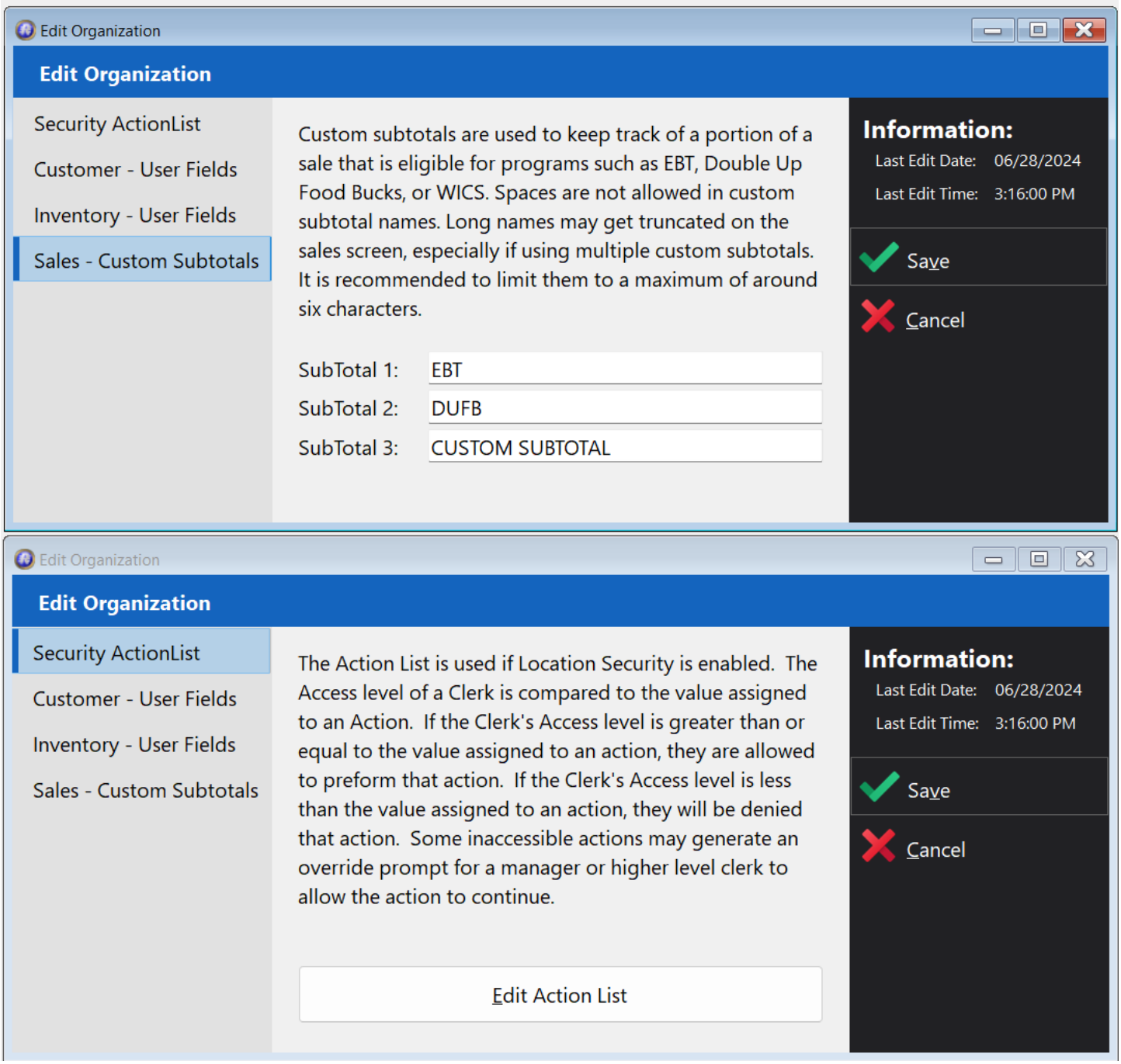
New Organizational Settings

In the **Tools > Settings** Menu we have added an **Organizational Settings (All Settings)** option. These settings control the Customer and Inventory User Fields Names and allow you to create Custom Subtotals for items from the Weight, Age, EBT Item Editor page.

In addition, since the Security Action List is a Organizational Setting (enterprise wide), this version copies over the Action List editor to the Organization Editor. In a future release we will remove the option to edit these settings from the Location Settings. In order to make this change, we added some security settings to be able control access to these settings. You may need to modify the action level settings if you had the location settings action level something other than 99 (highest level).







Customer and Inventory User Field Names

Changing customer and inventory user field names can help you identify the fields use. For instance, you could rename your user fields, something like Season Code, Web Item, Image Name depending on how you want to use it. If you are editing the User Field Names, be aware that:

1. this will affect these field names on all workstations and locations in your organization. So before you update these fields, you need to make sure that all workstations and locations have been updated to this this program version. And in a multi-location or Island Workstation environment,

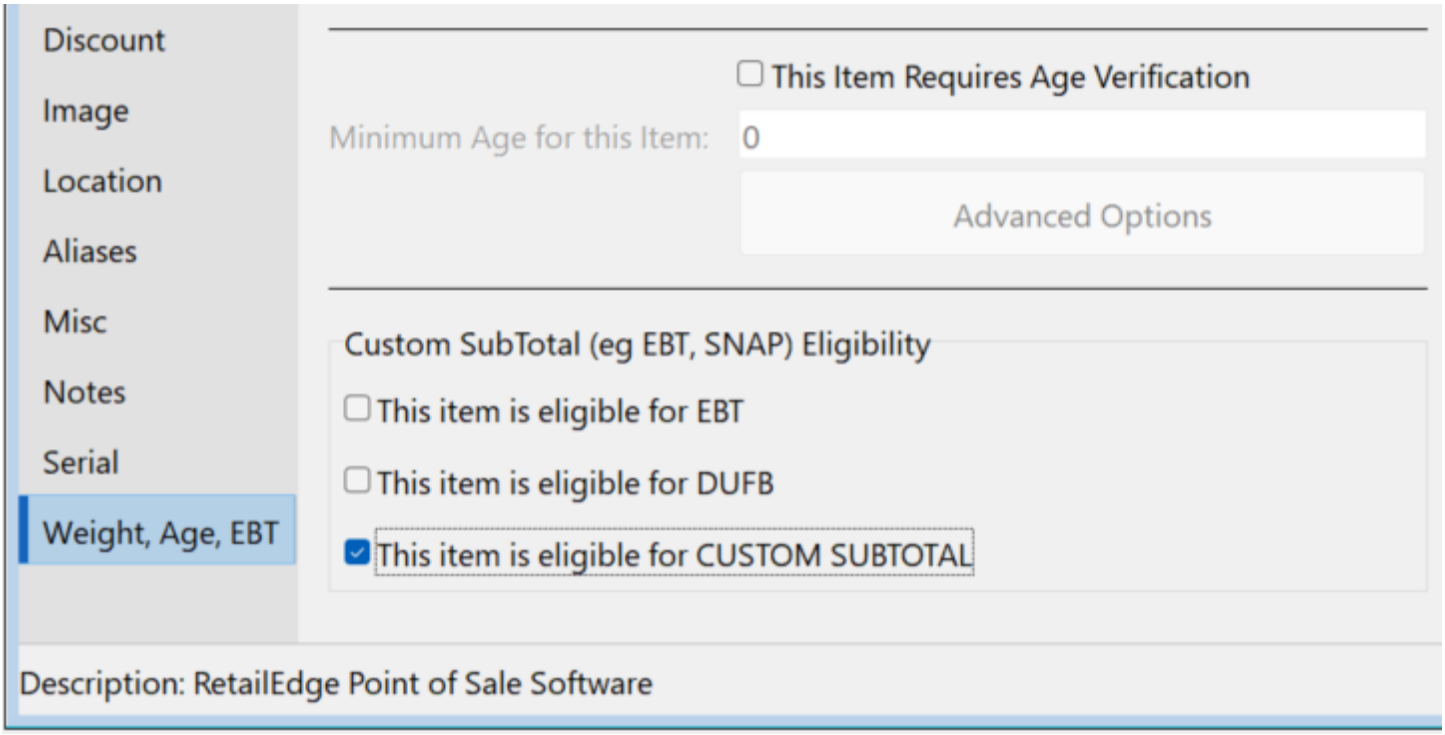
all the locations are syncing so that they can receive the change.

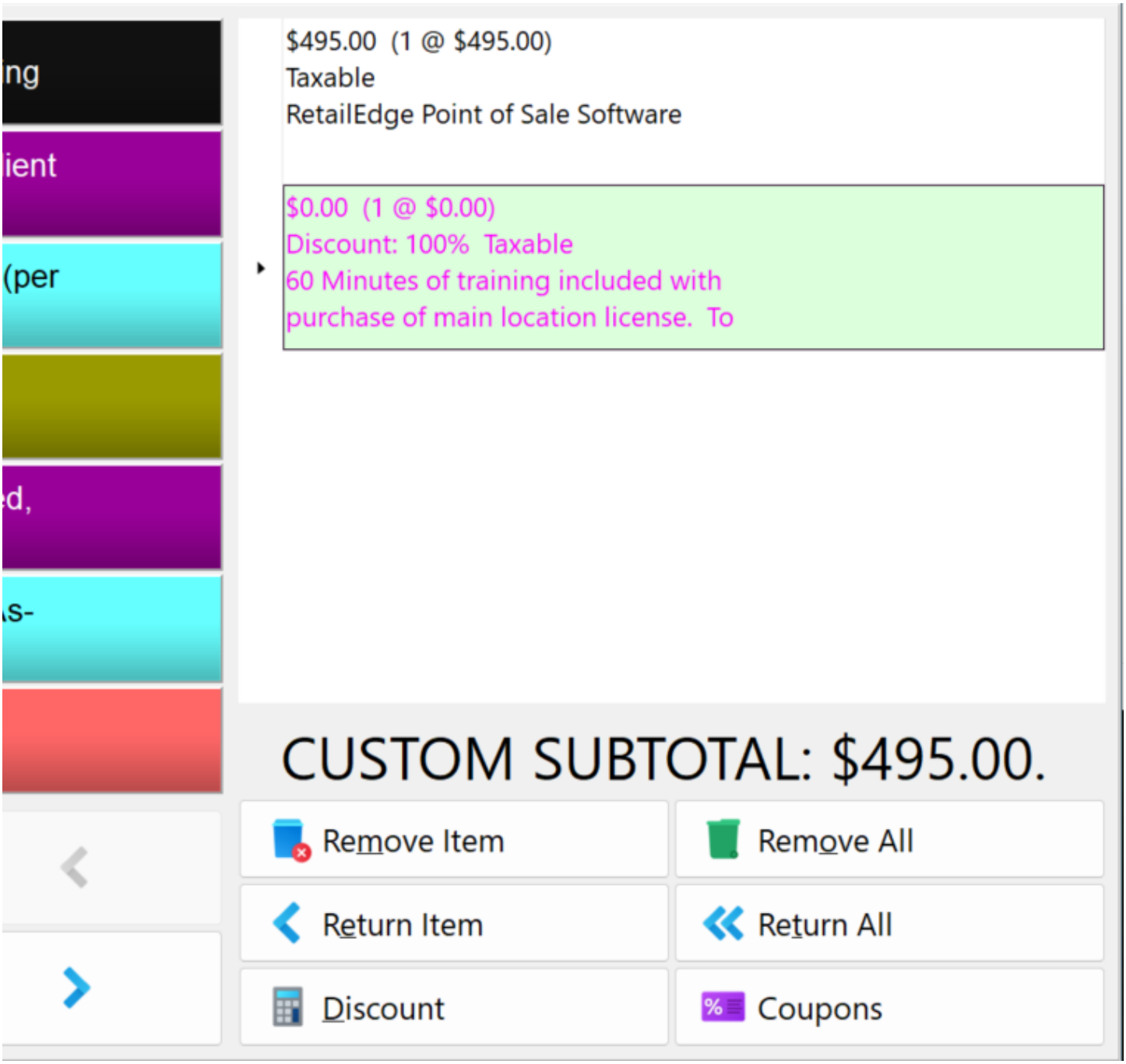
2. this change affects anywhere these custom fields are used. This includes:
    a. report filters,
    b. discount rule filters (user name season codes),
    c. export filters (Shopify tags and filter values), and
    d. import templates.

Although changing these values can help to identify what the field is being used for, care should be taken when changing user field names.

Custom Subtotals

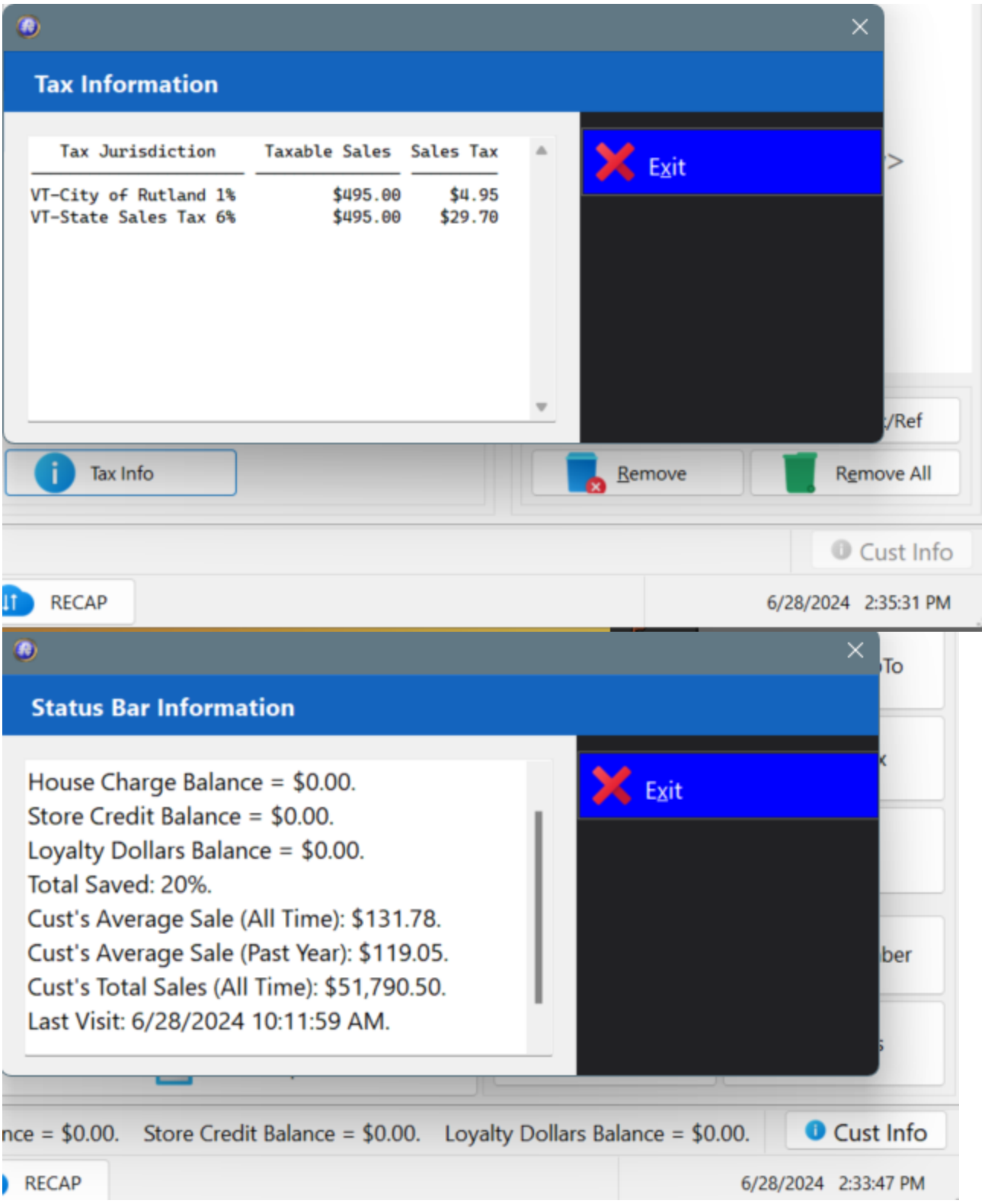
Custom Subtotals allow you to rename the Custom Subtotals displayed on the Weight, Age, EBT Item Editor page and on the Sales Screen. Custom Subtotaling can be useful for SNAP/EBT, Loyalty Program Eligible totals, or any other to subtotal that you might need information about during the checkout process.

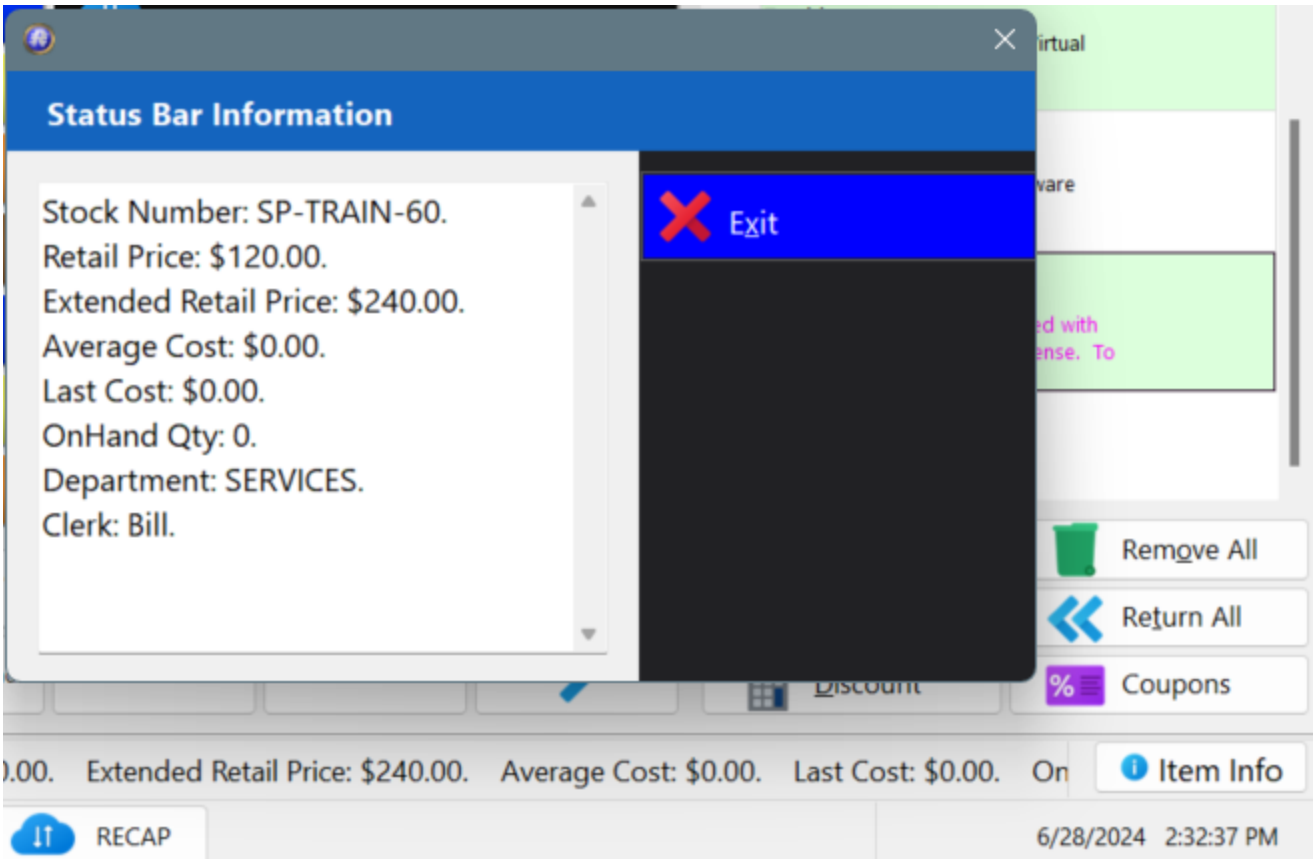




Item Info, Cust Info, and Tax Info and Buttons

Sometimes you might want to view a little more information about the sales tax collected, about the customer or items on the sale. This version has three new buttons allow you to quickly see this this information from the sales screen.

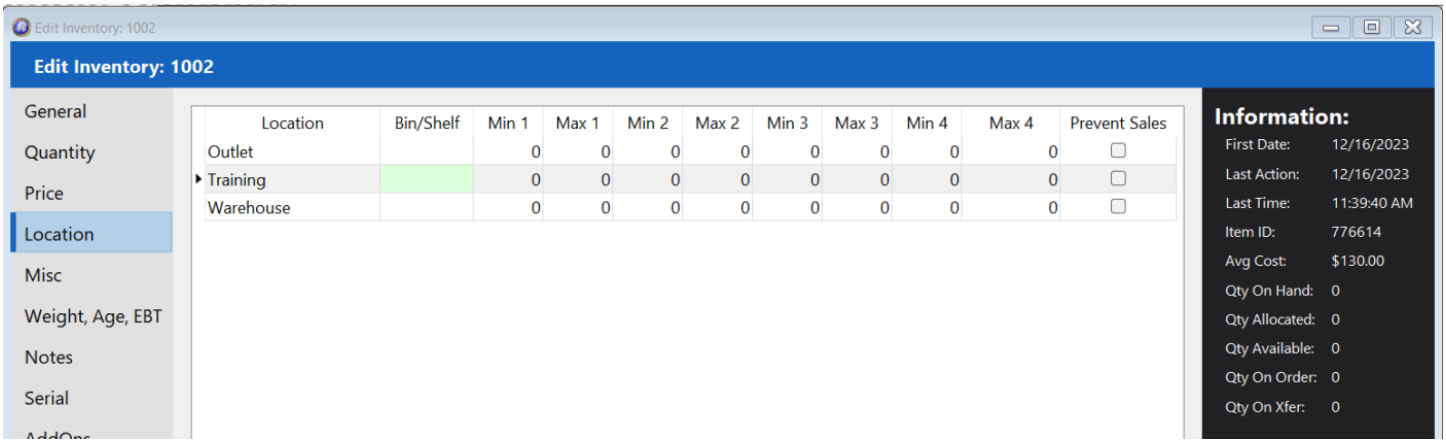

Tax Information
Tax Jurisdiction
Taxable Sales
Sales Tax
VT-City of Rutland 1%
$495.00
$4.95
VT-State Sales Tax 6%
$495.00
$29.70
Exit
Tax Info
Remove
Remove All
Cust Info
RECAP
6/28/2024 2:35:31 PM
Status Bar Information
House Charge Balance = $0.00.
Store Credit Balance = $0.00.
Loyalty Dollars Balance = $0.00.
Total Saved: 20%.
Cust's Average Sale (All Time): $131.78.
Cust's Average Sale (Past Year): $119.05.
Cust's Total Sales (All Time): $51,790.50.
Last Visit: 6/28/2024 10:11:59 AM.
Exit
nce = $0.00.
Store Credit Balance = $0.00.
Loyalty Dollars Balance = $0.00.
Cust Info
RECAP
6/28/2024 2:33:47 PM



Prevent Item Sales from other locations

This version added the ability to prevent sales of items from certain locations. This can be helpful for multi-location businesses that carry products that can't be sold in different states or when creating different add-ons for different locations (e.g., certain wines can be sold in one location or bottle deposits are different in different states).

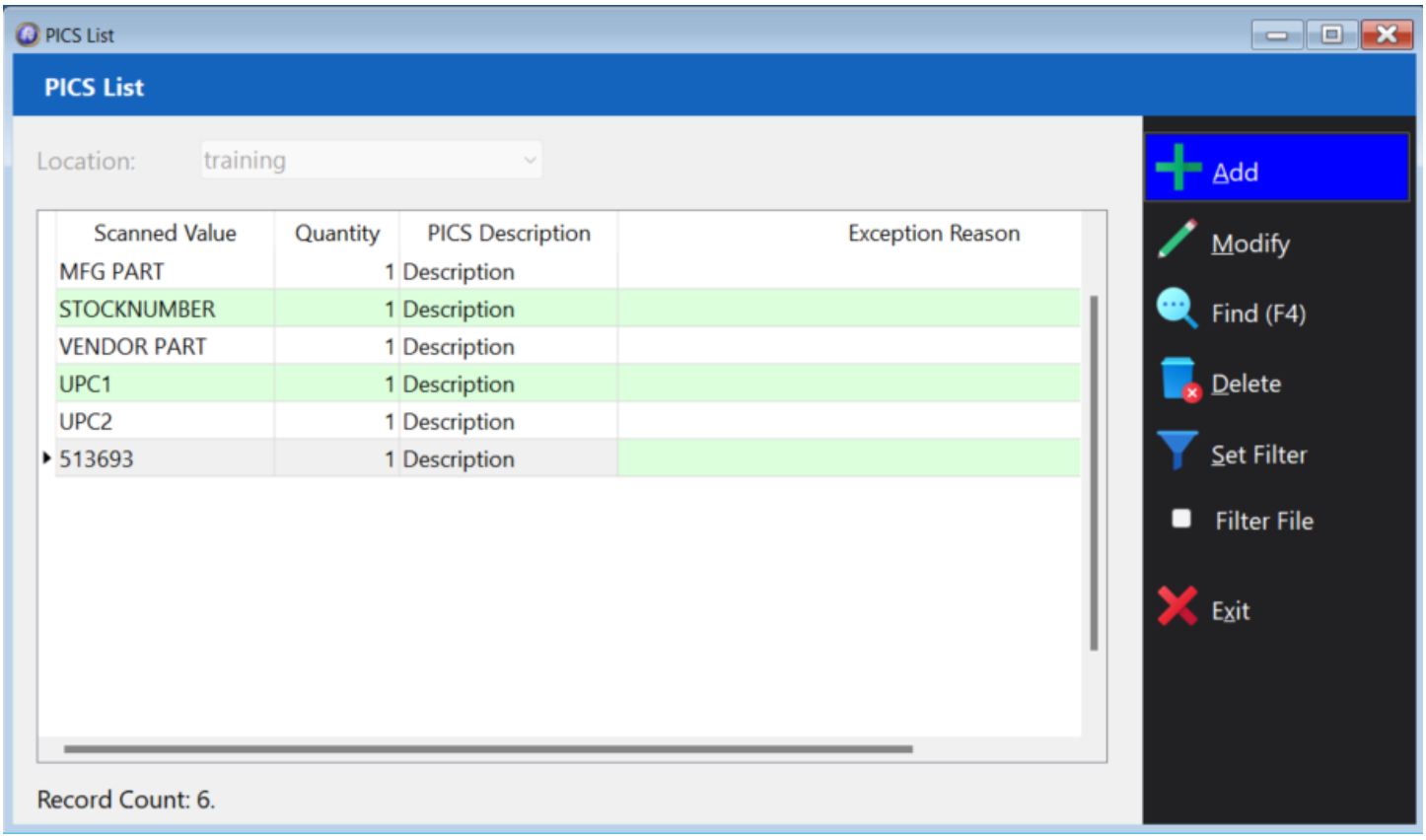
This option can be found on the Location page of the inventory editor. When Prevent Sales is selected for a particular item, the item can't be added to the Sales Screen in the selected location.



PICS now looks up Vendor and Manufacturer's Part numbers scans

When scanning items into the PICS (Physical Inventory Collection System) list, RetailEdge will now recognize **Vendor and Manufacturer part numbers**. This can help you scan and identify items that have not been tagged with a RetailEdge barcode label or where items scanned have just a manufacturer's part number barcode on them.

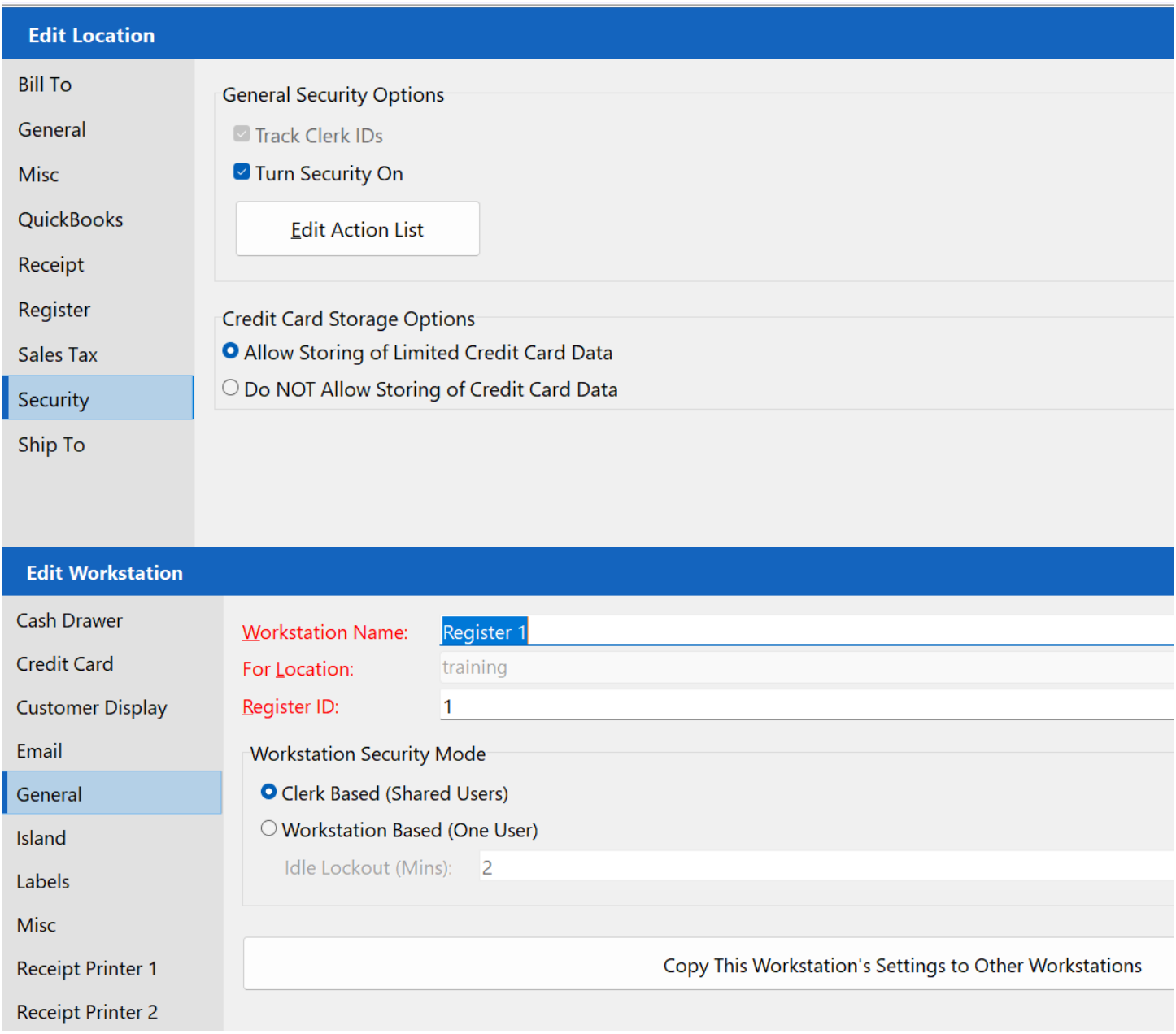
The scanned value will show up in the list to allow you to easily see which barcode was scanned on entry. And as always, the description will be populated in the grid if the item is found in the inventory.



Clerk IDs Now Required if Security Is Turned On

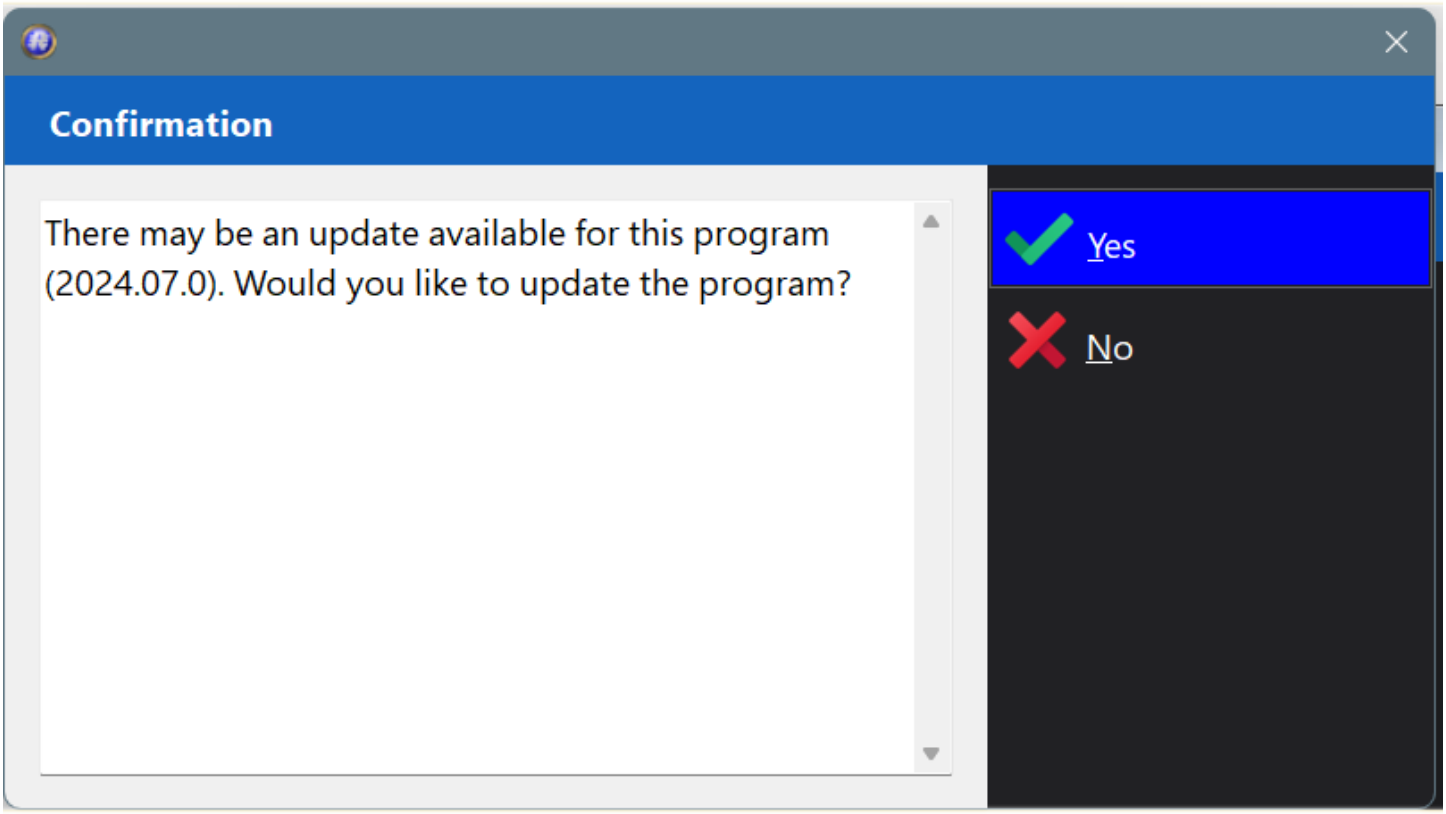
When security is turned on from the Location Editor, it will now require that Track Clerk IDs is also checked. This can cause some issues for users who were not tracking clerks on the Sales Screen but wanted security turned on for other functions. To get around having to enter a Clerk ID for every

sale (even if security is set to 0) you should consider creating a generic clerk with a simple Clerk ID that you can use (e.g., 1) and then setting your Security Mode in the Workstation Settings to Workstation Based with a Short Idle Lockout value (e.g., 2 minutes).



Update Prompt when Running a Customer Facing Display

We have seen with some users running customer facing displays, that the update confirmation screen gets displayed on the Customer Display and not the main screen. This can make RetailEdge appear to freeze. Just close the confirmation box on the rear display with your mouse (or press ESC), and choose Program Updates again from the Help Menu.


Confirmation
There may be an update available for this program (2024.07.0). Would you like to update the program?
Yes
No


PROCESSING SALE
Qty
Item
Each
Amount
1 ULTRAWF FRIGIDAIRE WATER FILTER
$235.00
$235.00
1 Frigidaire PureSource Ice & Water Filtration System (WF1CB)
$135.00
$135.00
1 Pioneer CD Player (CDS-P4000)
$300.00
$300.00
1 Glad Flap Tie Trash Bags
$25.00
$25.00
1 JBL Speakers (ME2832-012992)
$725.00
$725.00
1 AIERBAITA Intimate Panty(013)
$11.00
$11.00
Subtotal:
$1,430.00
VAT Tax:
$1.00
Total:
$1,431.00