

eFlorist by teleflora. RELEASE NOTES
Ver. 25.3

Release Notes



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ENHANCEMENTS

Customer Accounts

eFlorist POS 25.3 includes several enhancements to Customer Account features.

- ❖ **Active Status**
- ❖ **Account Merging**
- ❖ **Account Creation without Email**

Active Status

It is now possible to edit the active status of customer accounts by marking them as **Active** or **Inactive**.

This option is found in the **Account Details** section of **Customer Lookup**. The following permission changes take effect upon marking an account as Inactive:

- **Prevents customer login to eFlorist storefront.**
- **Disabled House Account payment entry.**
- **Opts account out of email marketing.**
- **Disables Rewards program points.**

The screenshot shows a form titled "Account" with a sub-section "House Account Settings". The "Account Status" field is highlighted with a red box and contains a green button labeled "ACTIVE". Other fields include "Tax Exempt" (OFF), "Reference Number" (XXXXXXXXXX), "Tax ID" (XXXXXXXXXX), "Allow House Charges" (OFF), "Statement Copy" (Email Statements), "Include Invoices with Statements" (OFF), "Include Late Messages on Statements" (ON), and "Charge Late Fees" (ON).

Figure 1: Customer Account Details

Account Merging

It is now possible to merge customer account data into a single account. This can be especially useful when checking for duplicate accounts.

Merging Accounts Using Find Duplicates

ePOS can now automatically detect duplicate accounts based on the similar or matching Name, Address or Phone information.

To identify and merge duplicate accounts:

- 1) Click the **Settings** menu of ePOS Dashboard to open.
- 2) Next, select **Merge Customer Accounts**.

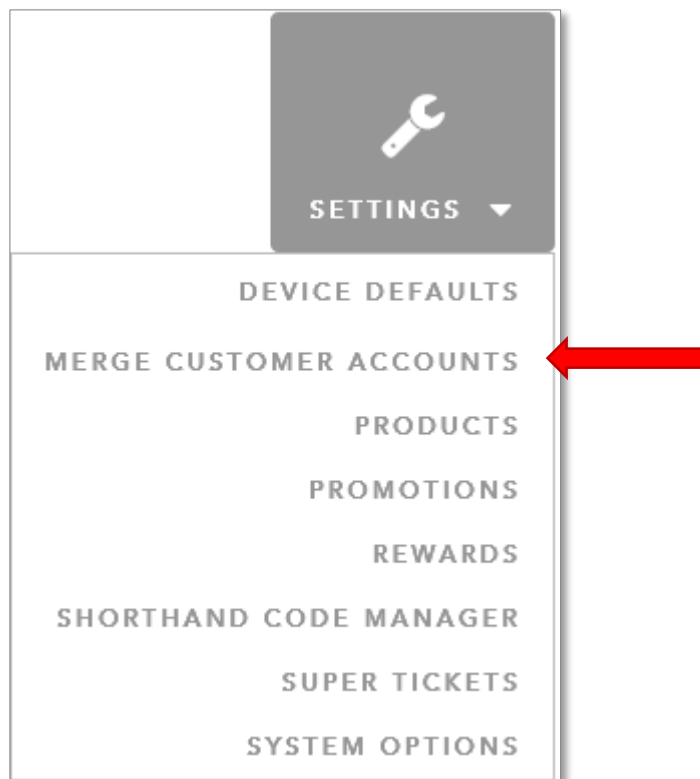


Figure 2: Settings - Merge Customer Accounts

The **Merge Customer Accounts** page displays.

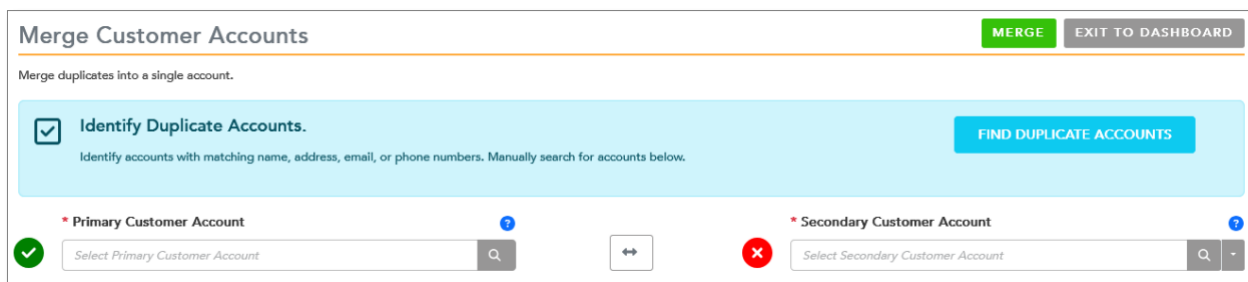


Figure 3: Merge Customer Accounts



- 3) Click **Find Duplicate Accounts** to open duplicate account search.
- 4) Using the drop-down menu, select to filter by **Exact Match** or **Similar Matches**. Additionally, searches may be filtered by **Name**, **Address** or **Phone** information.
- 5) After selecting the appropriate filter options, click **Filter**.

Duplicate Customer Matches

Select two account and click the 'Merge' button to combine data from both accounts into a single primary account.

Exact Match Name Address Phone(s) **Q FILTER**

No Results

MERGE **CLOSE**

Figure 4: Duplicate Customer Matches Search

Any matching results are then displayed.

2 Potential Matches Found Name Matches: 2 Address Matches: 2 Phone Matches: 2

	Name	Email	Address	Phone
<input checked="" type="checkbox"/>	Zach Brannigan	zbran@email.com	607 GLADIOLUS DR D4 Jonesboro AR 72404	(555) 555-5555 ALT
<input checked="" type="checkbox"/>	Zach Bran	zbran@email.com	607 GLADIOLUS DR Jonesboro AR 72404	(555) 555-5555 ALT

MERGE **CLOSE**

Figure 5: Duplicate Account Filter Results

- 6) Select customer accounts to merge by clicking their appropriate **checkbox**, then click **Merge**.



Only two accounts may be selected to merge at a time.

Next, ePOS displays the selected accounts' details to be merged.

Primary Customer Accounts will be retained, while the following information from **Secondary Customer Accounts** will be merged.

- ✓ Account History, including transactions and outstanding balances.
- ✓ Address Book including recipient history.
- ✓ Marketing Reminder details.
- ✓ Reward Points – This may affect current reward tiers once transferred.

Additionally, the date of account merger is noted on the primary account.

Swap the selected Primary and Secondary accounts using the swap button in the center.



- 7) Click **Merge** to complete the merging process. A confirmation message displays at the top of the screen confirming the merger.

Merge Customer Accounts **MERGE** **EXIT TO DASHBOARD**

Merge duplicates into a single account.

Identify Duplicate Accounts. **FIND DUPLICATE ACCOUNTS**
 Identify accounts with matching name, address, email, or phone numbers. Manually search for accounts below.

Primary Customer Account

Select Primary Customer Account

Customer Details

Primary Store: Cloud Test 321
 Name: Zach Brannigan
 Address: 607 GLADIOLUS DR, D4, Jonesboro, AR, 72404
 Email Address: zbran@email.com
 Phone: (555) 555-5555
 Notes: -

Account Details

The transaction details of both accounts will be merged. Order and Payment Histories from both accounts will be found in the primary account, and new account balances will be calculated that include both account's histories.

Current Due	\$ 0.00
Current Balance	\$ 0.00
30 Day Balance	\$ 0.00
60 Day Balance	\$ 0.00
90 Day Balance	\$ 0.00
Total Charges	\$ 0.00

Address Book

The address book of both accounts will be merged. This will maintain the recipient list of both accounts to be accessed when creating a new order.

↔

Secondary Customer Account

Select Secondary Customer Account

Customer Details

Primary Store: Cloud Test 321
 Name: Zach Bran
 Address: 607 GLADIOLUS DR, Jonesboro, AR, 72404
 Email Address: -
 Phone: (555) 555-5555
 Notes: -

Account Details

The transaction details of both accounts will be merged. Order and Payment Histories from both accounts will be found in the primary account, and new account balances will be calculated that include both account's histories.

Current Due	\$ 0.00
Current Balance	\$ 0.00
30 Day Balance	\$ 0.00
60 Day Balance	\$ 0.00
90 Day Balance	\$ 0.00
Total Charges	\$ 0.00

Address Book

The address book of both accounts will be merged. This will maintain the recipient list of both accounts to be accessed when creating a new order.

Figure 6: Account Merge - Selected Accounts

Merging Individual Accounts

Individual accounts may also be merged by searching for the accounts using the text entry fields.

- 1) Simply enter the appropriate **Primary Customer Account ID**, or click the **search icon** to search using customer lookup.
- 2) Next, search for the secondary account or use the drop-down menu to filter by similar matches according to Phone or Name information.

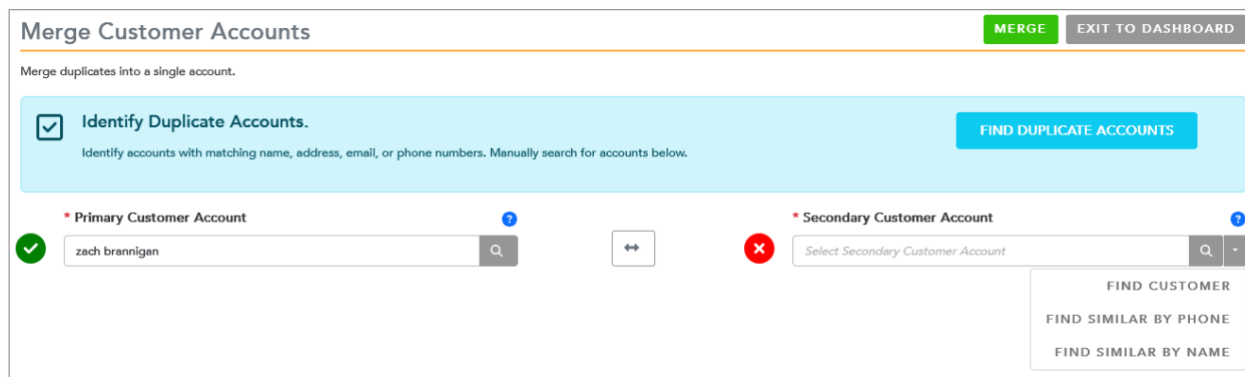


Figure 7: Merge Customer Account Manual Entry

FTD Network Order Interface

A new **FTD Network Order Interface** is available for eFlorist POS! This new feature allows for automatic importing of FTD orders, saving you time processing these orders.

Imported orders appear in the **Orders** tab of the **ePOS Dashboard**, allowing you to process these orders using normal processes for wire in and web orders.



Imported order information attempts to match product codes to those configured in ePOS. In instances where a matching code is not available, the order displays the product code EPOS-1A.



For more information, or to enable the FTD Interface service, contact Teleflora Technology Sales at **800-720-9407**.

Configuring FTD Network Information

Once enabled, the FTD Network details must be configured within ePOS Network Settings.

- 1) Open the **Modules** menu of the ePOS Dashboard and select **Dove Network**.
- 2) With the Dove Network page displayed, open the **Settings** menu and select the **Settings** option.

The Dove Network Settings page displays with a list of currently configured **Florist Networks**.

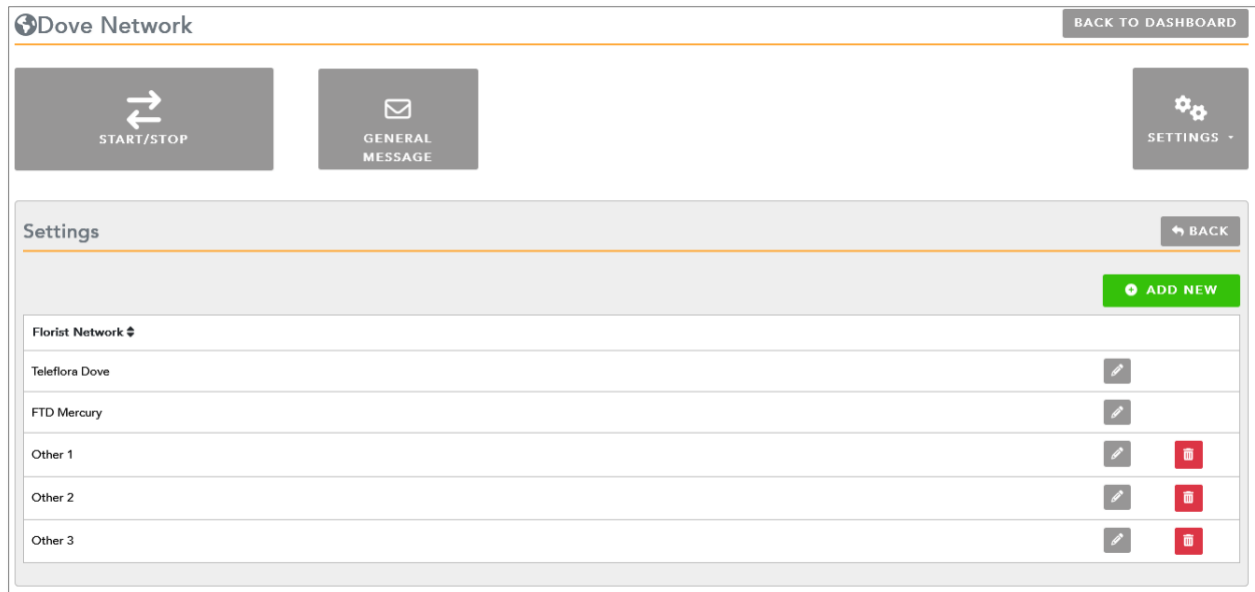


Figure 8: Dove Network Settings

- 3) Click the **Edit** option for the **FTD Mercury** entry in the table.
- 4) With the FTD Mercury network settings form displayed, enter the appropriate **Member ID**, **Username** and **Password** for the FTD Mercury Network.
- 5) Click **Update** once all appropriate details have been entered.



Figure 9: Network Settings

FTD Web Orders

Imported FTD Web orders note important payment details when displayed in the Actions queue. These details indicate how payment for these orders must be processed to complete.

- **CARD NOT PROCESSED** – Payment for these orders has not been processed by FTD. Payment information must be entered manually at time of processing to complete.



ePOS does not provide full Credit Card information for these orders. Contact the customer or FTD to request this information for processing.

- **CC Approved – Do Not Reprocess** – Payment for these orders have been processed by FTD. Select the MOP type of **External Terminal** for these orders.

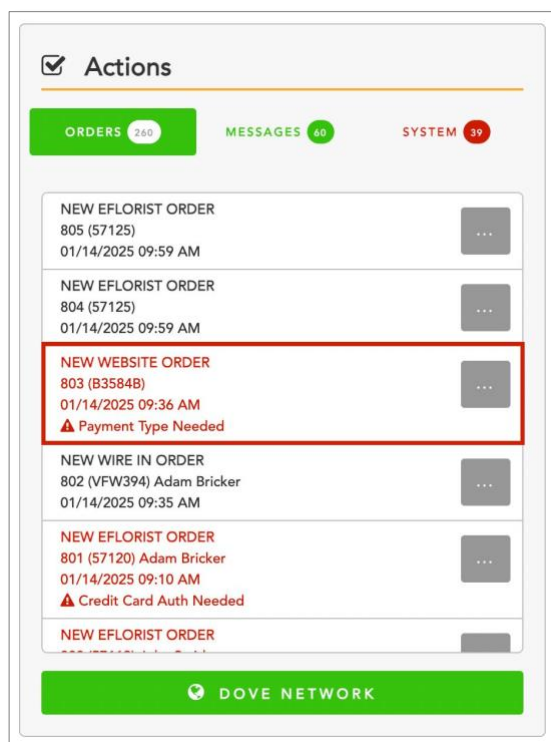


Figure 10: FTD Web Order Details

OTHER CHANGES

- ❖ **Updated Delivery Manager Icon Guide descriptions for clarity.**