



New Features & 2026 Roadmap

2025 STATS (YTD)

401 new/unique development requests
(over 2 per business day)

306 completed development requests

9,774 support cases opened
(over 48 per business day)

9,826 support cases closed

2 hour first response time compliance: 97%

Support CSAT score: 99.3%

Support calls answered: 6,696

Average call wait time: 54 seconds



New online help!

- Clean, modern interface
- Better wayfinding tools
- Responsive, for Desktop or Mobile
- A smarter, more comprehensive search
- Faster content loading
- Lite and Dark modes

The screenshot shows the 'Available to Sell' help page. At the top, a breadcrumb trail 'Serial Inventory > Available to Sell' is highlighted with a red box and labeled 'Breadcrumbs'. To the right, a 'Topic Navigation' sidebar lists related topics like 'How ATS is Calculated' and 'Setting Up ATS'. The main content area features a search form with a yellow callout 'Click here to make this your default Search' pointing to the search options. Below the search form is a table with columns for 'ATS', 'Model', 'Brand', 'Prod', 'Description', 'Main', and 'Loc'. A table row shows 'WTW9500EW' with an ATS of -1. A blue callout box labeled 'Direct linking' points to a link 'Why can't I see the ATS column in Serial Inventory Maintenance'. At the bottom, the section 'How ATS is Calculated #' has a red callout pointing to a link 'Direct link to How ATS is Calculated'.

Available to Sell

Available to Sell (ATS) is an indicator that shows how many units are available to sell right away. You can view a model's ATS in a column on the [Serial Inventory Maintenance](#) screen.

Serial Inventory

Search Options **Click here to make this your default Search**

Search For WTW9500EW By Model Matching Start of Field ☐ On Hand ☐ On Order ☐ Written ☒ Show ATS ☐ Show Serial Numbers Search

AND For By Brand Matching Start of Field

☐ Advanced Search

☐ Active Models or In-Stock Only

ATS	* Model	Brand	Prod	Description	Main	Loc
-1	WTW9500EW	WHIR	CL	HIGH EFFICIENCY TOP LOAD WASHER	1	0

► Why can't I see the ATS column in Serial Inventory Maintenance **Direct linking**

How ATS is Calculated # **Direct link to How ATS is Calculated**

EPASS calculates ATS based on two key parameters: the **Immediate Reserved Days** and **Immediate Ship**.

Topic Navigation

- How ATS is Calculated
 - Immediate Reserved Days
 - Immediate Ship
 - ATS Formula
- Altering the ATS Calculation
 - Using Immediate Unreserved QOH
 - Using Requested Date Instead of Pickup/Delivery Date
 - Excluding Negative Reserved Amounts
- Setting Up ATS
- See Also



New Features

New releases from 2025



- EPASS Reports (EPR)
 - SSO from EPASS
 - Force reports to run in EPR
 - SQL View support for Parameters
 - Static list for Parameters
- EPASS Pay
 - Full control over AVS & CVV handling
- XAPI
 - Misc search endpoint
 - Full rescheduling of invoices
 - Enhanced Service Requests endpoint
- Click to Pay (CTP)
 - Customer email / SMS confirmations
 - Upcharge support
 - Customizable Messaging

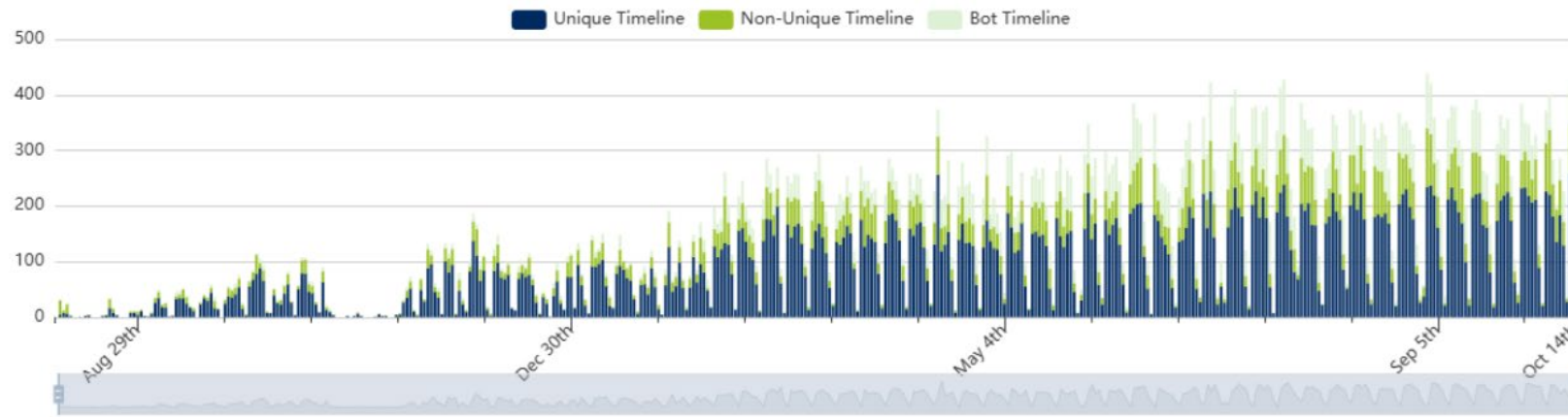
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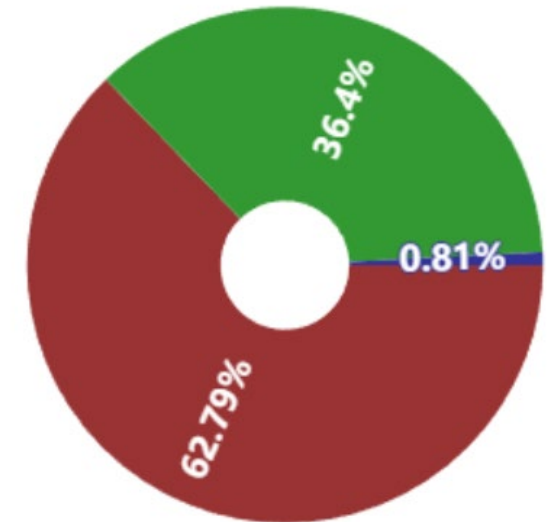


Click to Pay adoption



Top Devices

- Desktop
- Smartphone
- Tablet



New Features

New releases from 2025



- Invoicing
 - Misc Discounts on Warranty & Misc codes
 - Avalara Tax integration
 - Scheduling Assistant screen
 - Do Not Service models/serials
 - Update Misc price/cost on open invoices
- Accounts Payable
 - PO Number support
 - Add Check – search by Invoice
 - Month End Close
 - “Voucher” check series for EFT
- WMS
 - Serial picture download
 - Last 10 scanned during Physical Count

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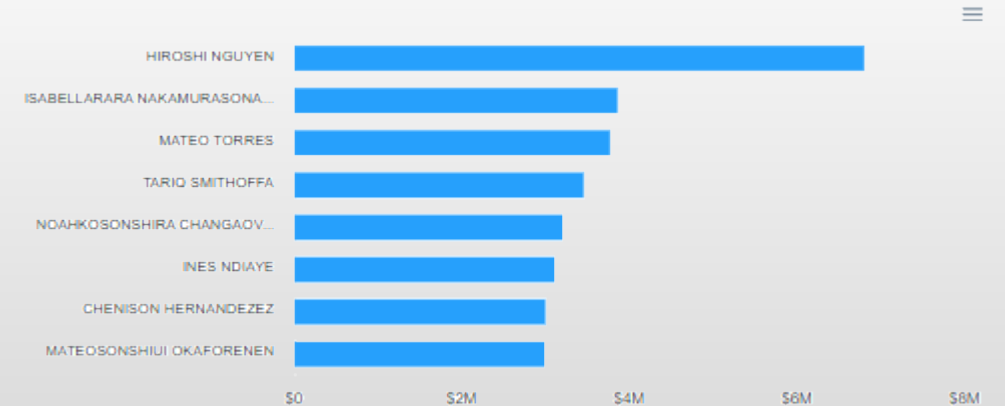
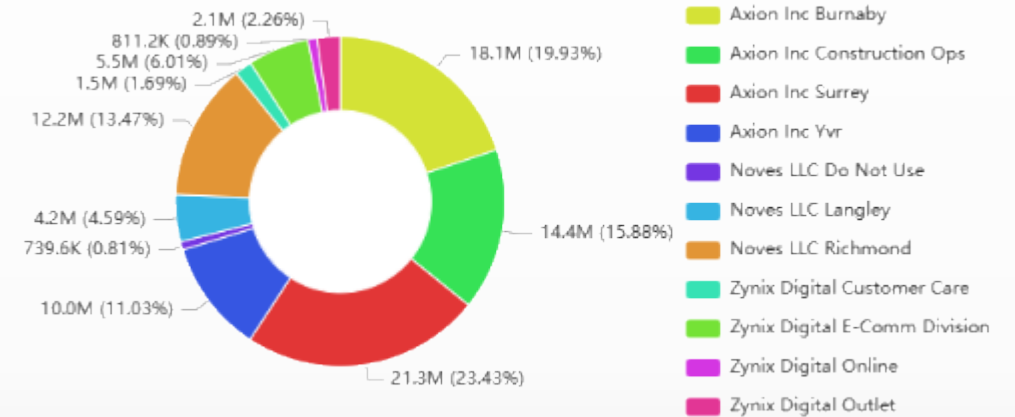
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EPASS Dashboards

Power your Insight - Storefront to Service Bay

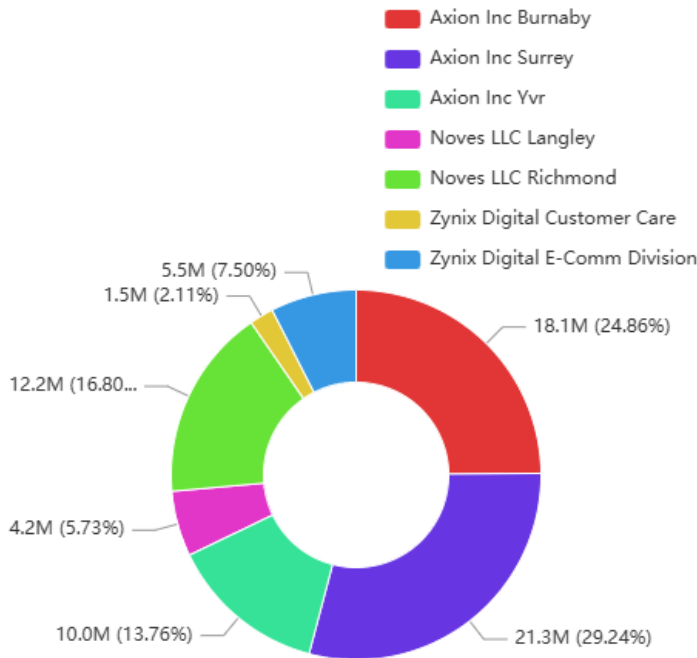
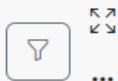


EPASS Dashboards

Branch Manager Dashboard

☐ Default

Burnaby, Surrey, Langley Branch Shipped Sales



All Branch YTD Shipped Sales



91.55M

Year-to-Date Sales

YTD Burnaby, Surrey, Langley Shipped Sales



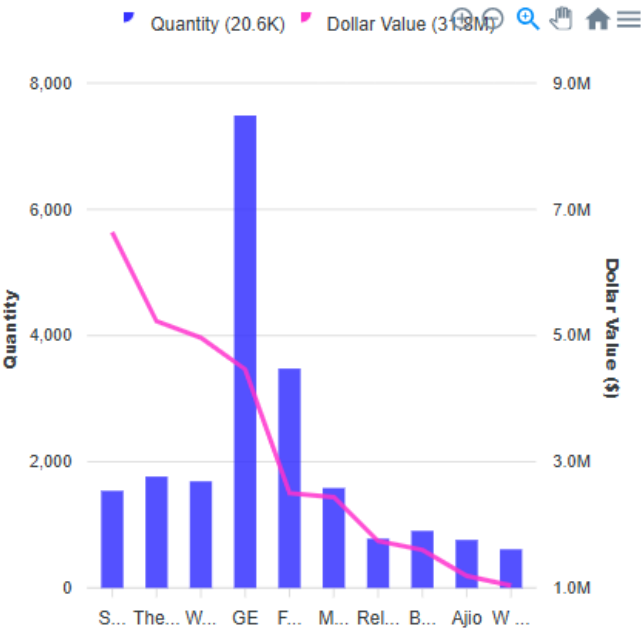
40.43M

Year-to-Date Sales

QOH by Brand

Top N:

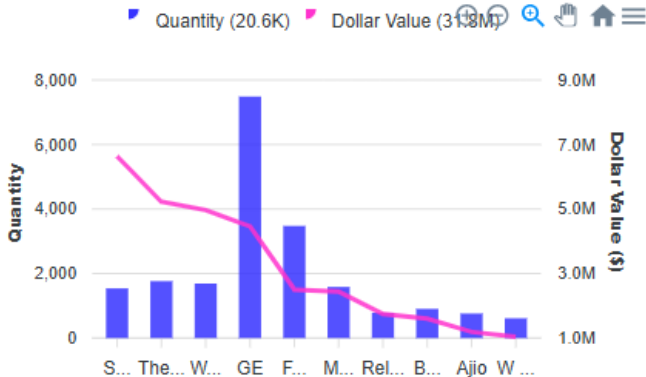
All



QOH by Appliances

Top N:

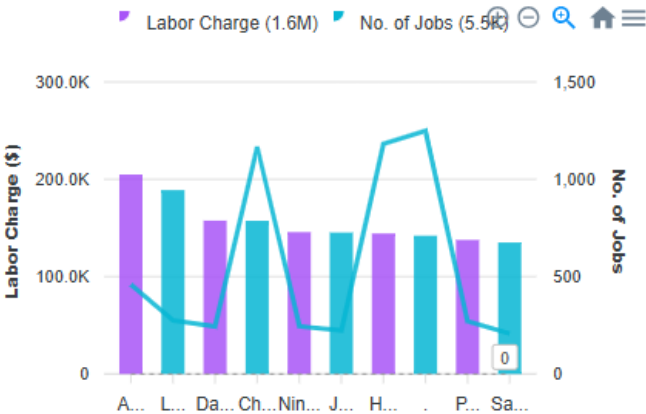
All



Labor vs Jobs

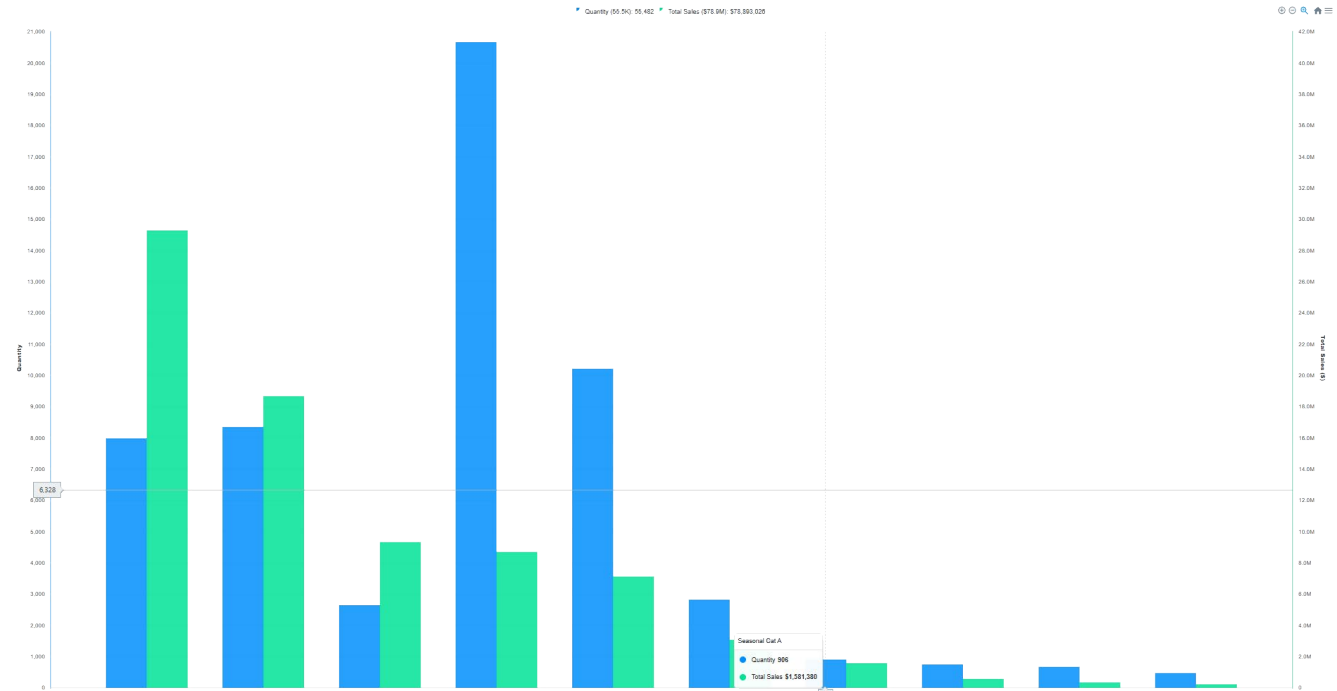
Top N:

All



EPASS Dashboards

- Create custom dashboards
- Assign dashboards to users/groups
- Choose from a gallery of widgets covering various functional areas like Sales, Shipping, Service etc.



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EPASS Dashboards

ADMIN - Manage Widgets

- Automatically load widgets into EPASS Reports
- Enable/Disable widgets
- Actions controlled via security options

[Administration](#) / [Dashboards](#) / [Dashboard Widgets](#)

Available Widgets

Widgets

	Frequently Used Reports Most Frequently Used Reports by user	<input checked="" type="checkbox"/>
	Reports Pending Download Reports generated, but not yet downloaded	<input checked="" type="checkbox"/>
	Reports Usage Distribution Report usage trends over time period	<input checked="" type="checkbox"/>
	Upcoming Scheduled Reports Upcoming Scheduled over time period	<input checked="" type="checkbox"/>
	Finished Invoices by Sales Referral Finished Invoices By Sales Referral	<input type="checkbox"/>
	Invoices by Start Date Multi-series line by invoice type across months	<input checked="" type="checkbox"/>
	On Hand by Product Serial Inventory On Hand by Product	<input checked="" type="checkbox"/>
	On Hand by Brand Serial Inventory On Hand by Brand	<input checked="" type="checkbox"/>
	Shipped by Branch Shipped Invoices By Branch	<input checked="" type="checkbox"/>
	Shipped by Brand Shipped Invoices By Brand	<input checked="" type="checkbox"/>
	Shipped by InvoiceTypes Shipped Invoices By InvoiceTypes	<input checked="" type="checkbox"/>
	Shipped by Product Shipped Invoices By Product	<input checked="" type="checkbox"/>
	Shipped by Product Major Shipped Invoices By Product Major	<input checked="" type="checkbox"/>
	Shipped by Product Minor Shipped Invoices By Product Minor	<input checked="" type="checkbox"/>
	Shipped by Salesperson	<input checked="" type="checkbox"/>

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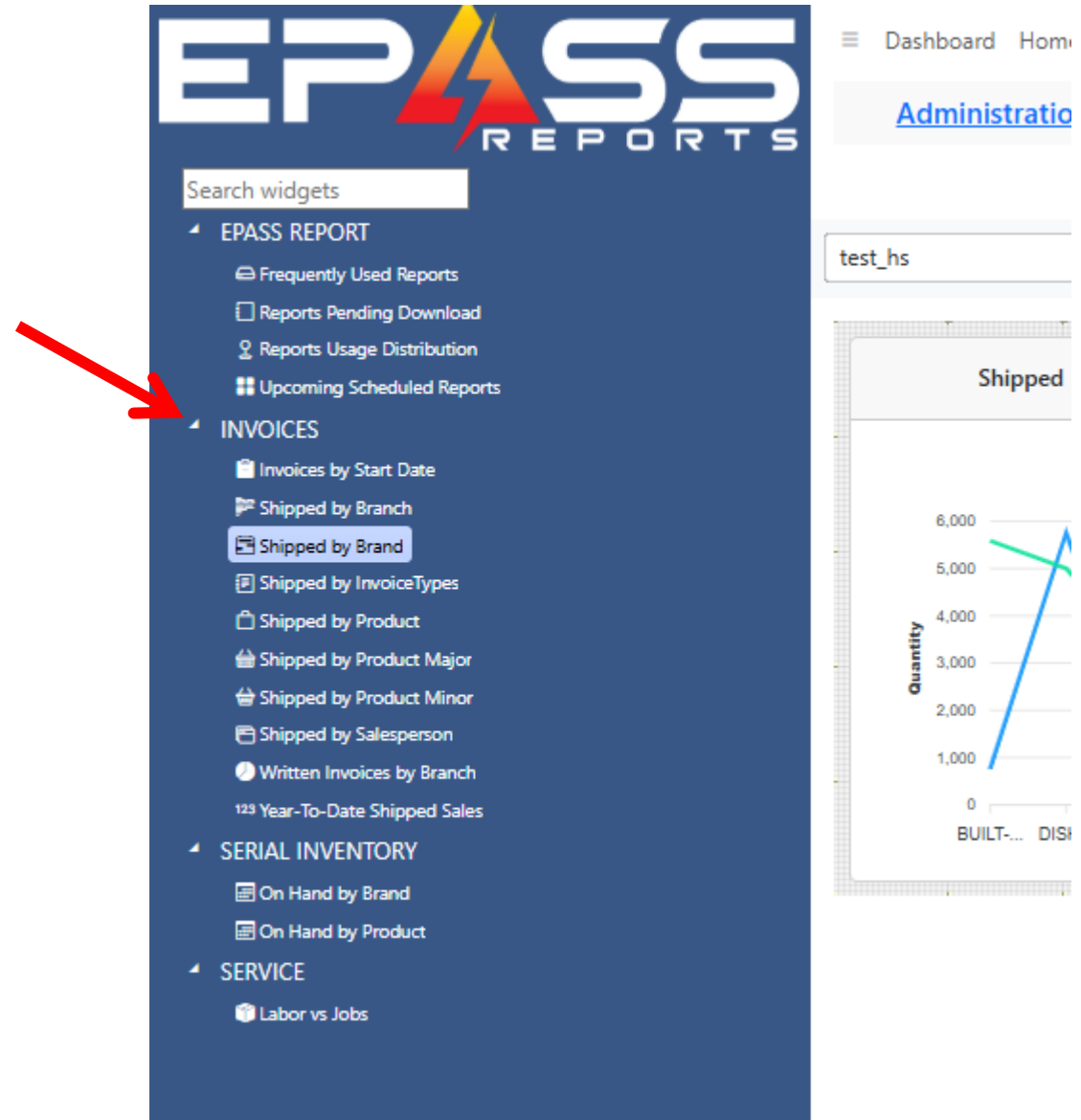
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EPASS Dashboards

ADMIN - Widget Groups

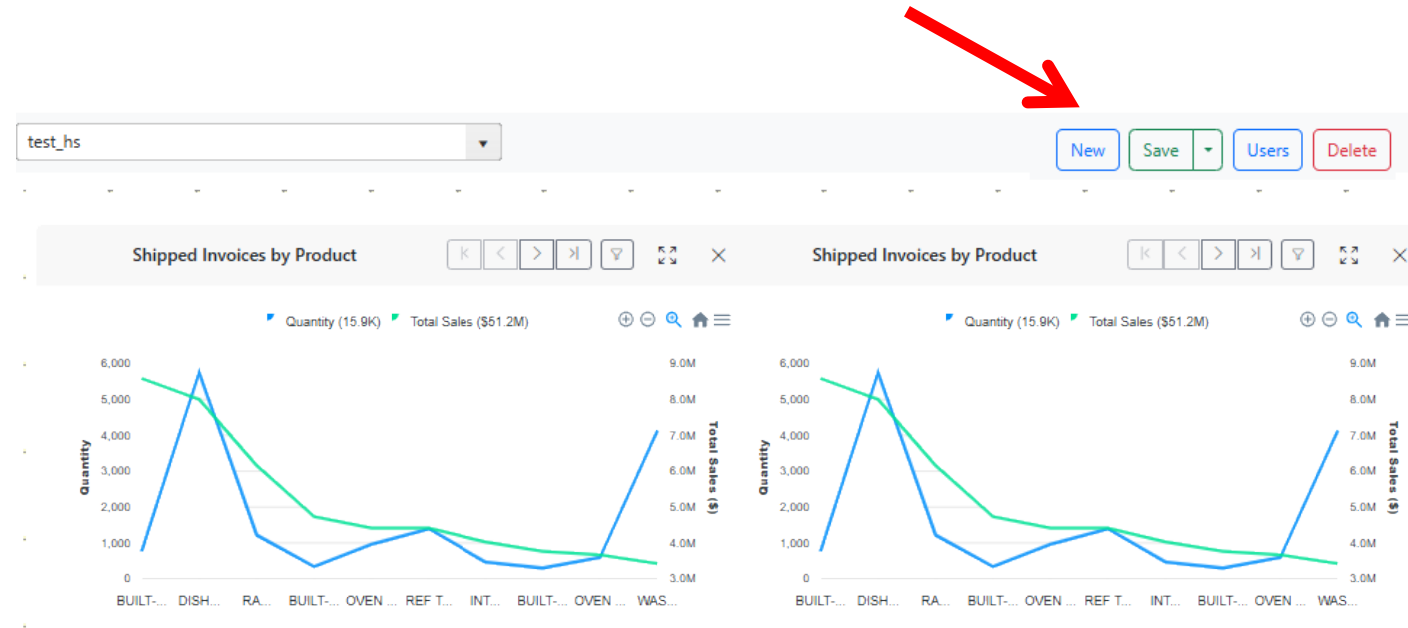
- Widget Group – a combined pool of related widgets
- Each widget group has security option
- Can see only available widget groups



EPASS Dashboards

ADMIN - Add, Copy, Assign, Delete Dashboards

- Add a new dashboard
- Drag/Drop widgets from widgets pane into dashboard
- Copy an existing dashboard
- Assign a dashboard
- Delete a dashboard
- Rename widgets
- Functions controlled by security options



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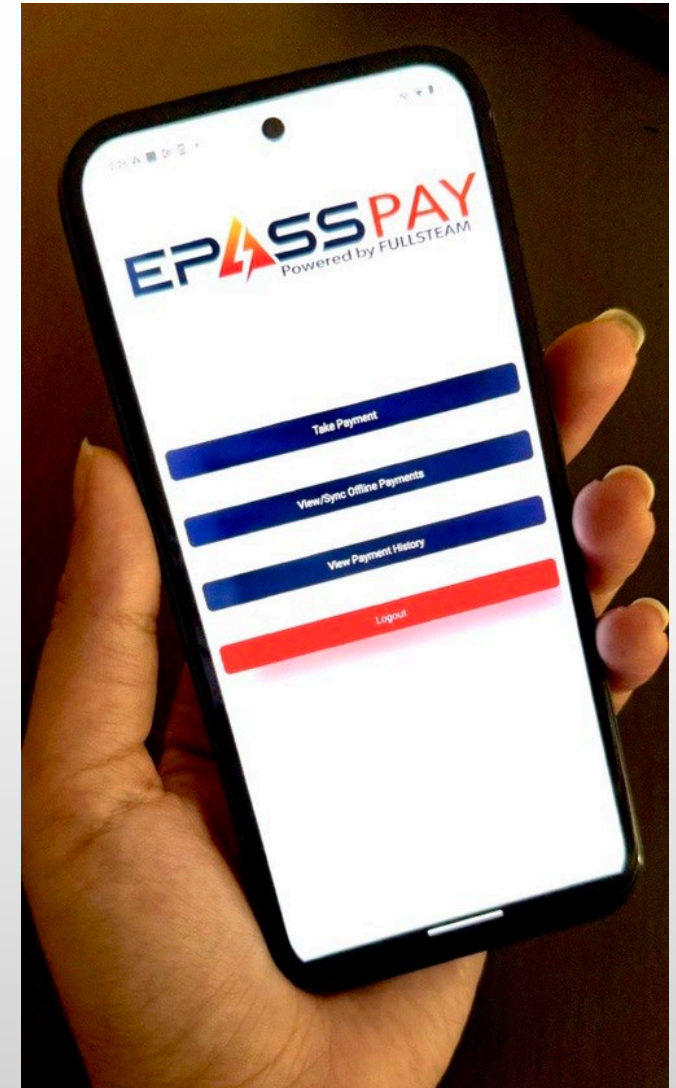
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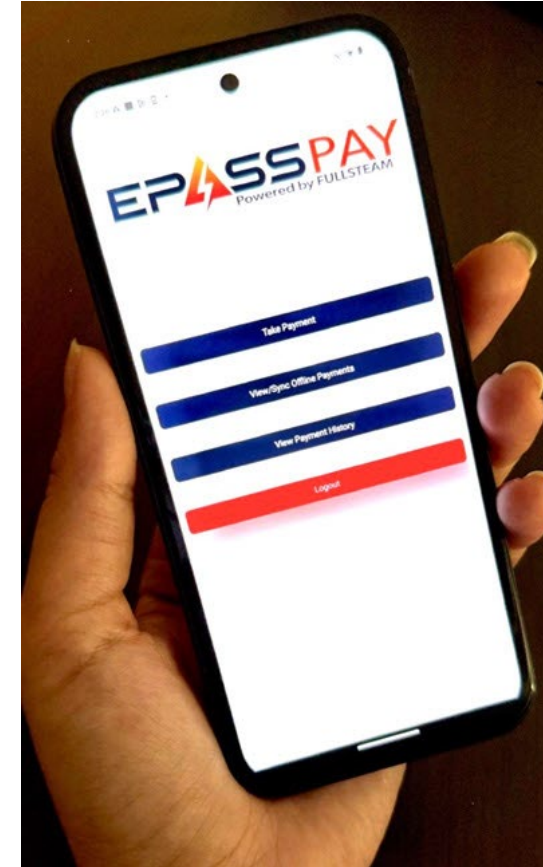
EPASS Mobile Pay

Accept payments anytime, anywhere



EPASS Mobile Pay

- Accept payments anytime, anywhere
- Transactions appear on the EPASS invoice within seconds
- App keeps a full record of all your payments for easy tracking and reference.



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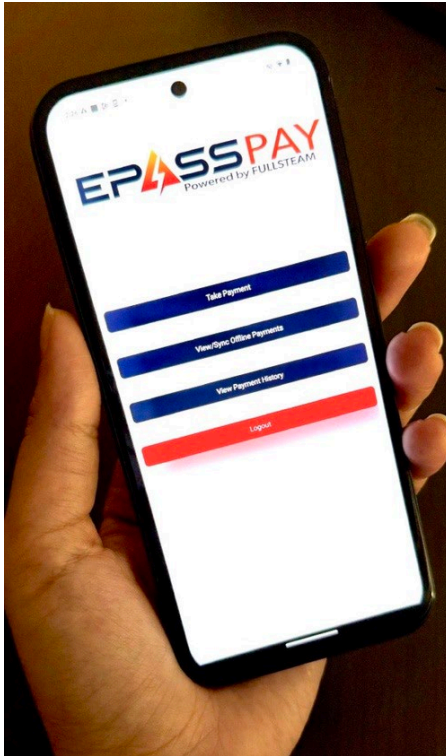
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EPASS Mobile Pay

Support for Multiple Payment Methods



- Full support for magnetic stripe, contact, and contactless EMV cards, as well as NFC wallets.
- Customers can choose how they want to pay - by swiping, tapping, or inserting their card.
- These options can be turned on or off as needed. (Chip and PIN support available soon!)
- Process customer payments instantly-even without Wi-Fi.*

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EPASS Mobile Pay

Magtek Dynaflex II Go Card Readers

- PCI 6.x SCR, SRED Compliant Card Reader
- Ready for Mobile Handsets, Tablets, and Desktop Computers
- Low-Profile and Versatile Device for Tap, Swipe, Dip, and Scan



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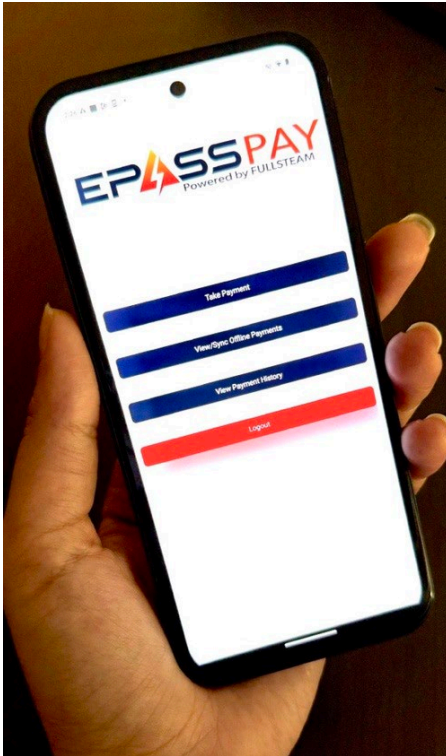
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EPASS Mobile Pay

Access Control & Accountability



- Requires EPASS login to access.
- Special security options required to take payment, view/sync offline payments and view payment history.
- User activity audit can be enabled on demand.
- Separate credentials to access Settings.

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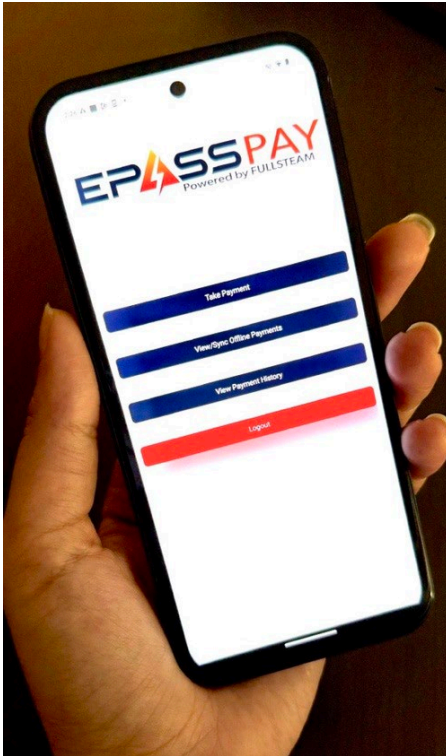
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EPASS Mobile Pay

Online Payments



- Processes payment instantly when internet is available.
- Simple steps to take payment
- Customer confirms payment
- Receipt with updated invoice sent to customer
- Notifications to staff on successful or failed payment

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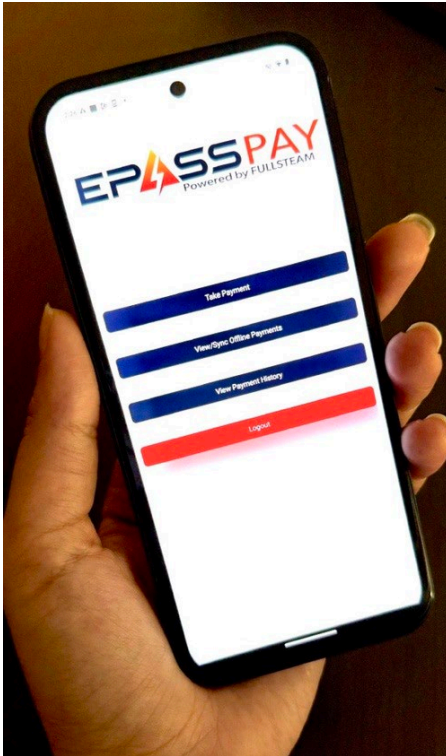
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EPASS Mobile Pay

Payment History



- Retains and shows payment history for 2 weeks.
- Retention period is configurable
- Can view payment details.
- Allows deletion of individual records as well as entire payment history.

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EPASS Mobile Pay

Take Online Payment

Click
Take Payment



Take Payment

View/Sync Offline Payments

View Payment History

Logout



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EPASS Mobile Pay

Take Online Payment

Enter Invoice
Number and
Payment Amount

Enter Payment

Invoice number

rs00000190

Amount

150

Next

Cancel

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EPASS Mobile Pay

Take Online Payment

Confirm Invoice
Number

Enter Payment

Invoice number
rs00000190

Amount
150

Next

Cancel

Confirm

You entered invoice number rs00000190 for the payment. Is this correct?

No Yes

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EPASS Mobile Pay

Take Online Payment

Upcharge

Invoice number

RS00000190

Amount

\$150.00

CTP CC Upcharge

\$84.00

Total

\$234.00

Next

Cancel

Includes credit card
up charge
(if applicable)



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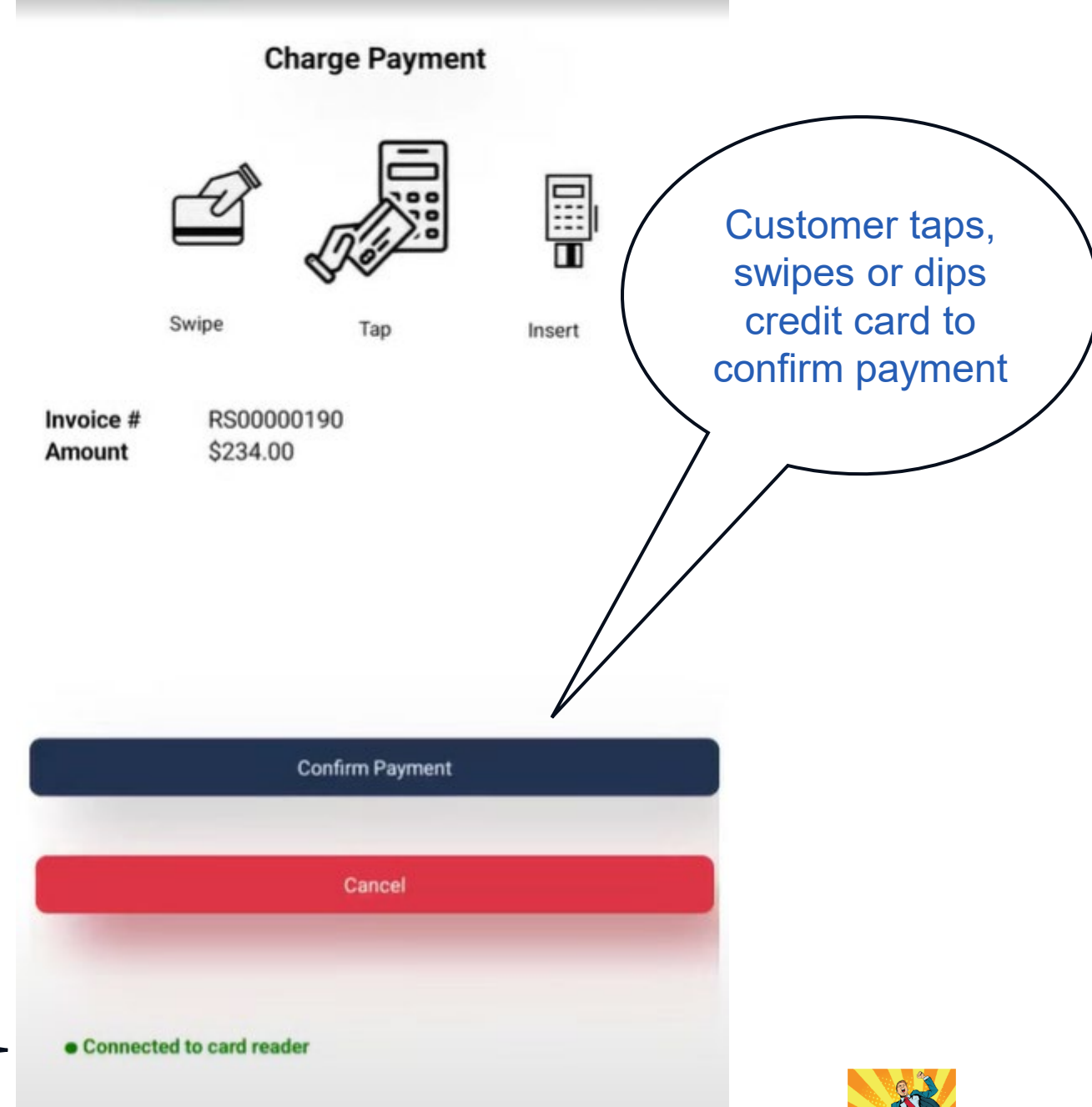
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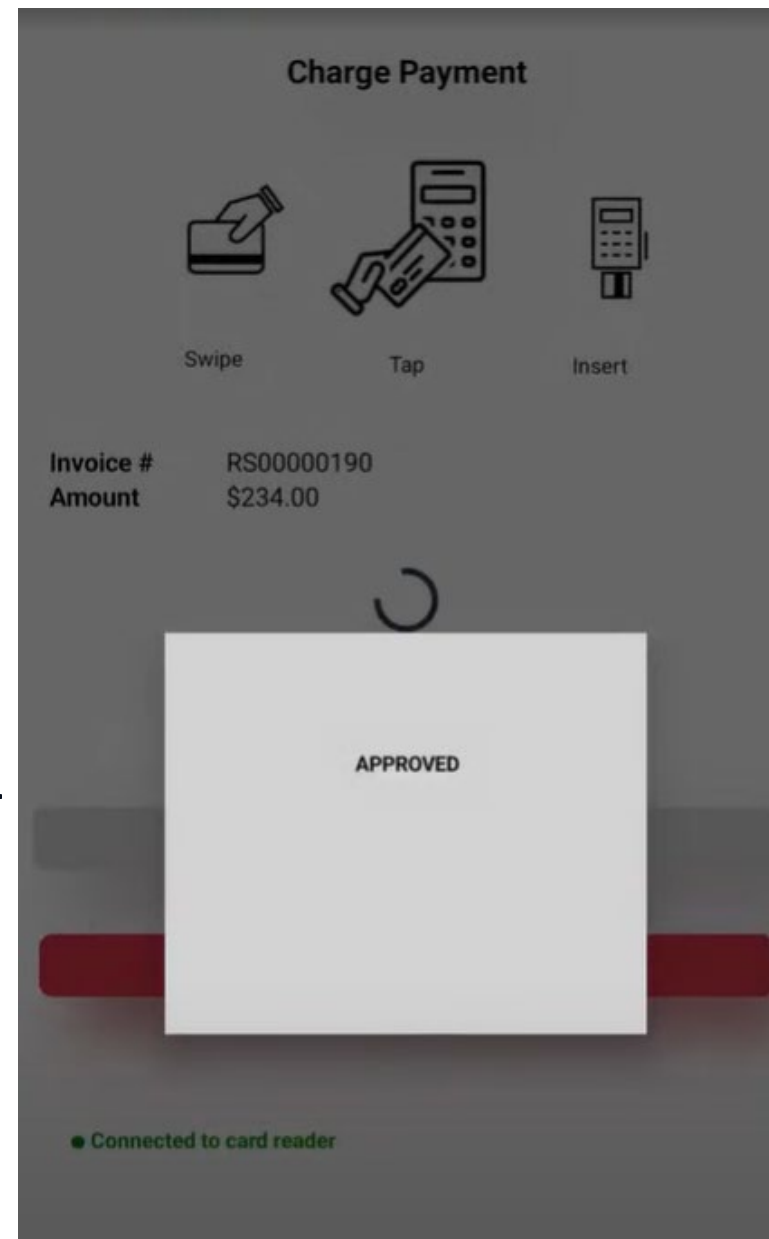
Take Online Payment

Connection
Status



EPASS Mobile Pay Online Payment Flow

Payment
Transaction Status



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EPASS Mobile Pay

**Payment
Transaction
Approved!**

Approved!

Your payment has been received.
An updated invoice will be sent by email when the payment is processed.

Date/Time: 9/17/2025 11:22:40 AM

Invoice #: RS00000190

Amount: \$234.00

OK

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EPASS Mobile Pay

Take Offline Payment

Click
Take Offline Payment

Remaining steps are identical
to Online Payment

Take Offline Payment

View/Sync Offline Payments

View Payment History

Logout



EPASS Mobile Pay

Take Offline Payment

**Offline Payment
Transaction Recorded!**

Offline Payment Recorded

The offline payment has been recorded.

This payment will show up in your invoice after it has been processed.

OK

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EPASS Mobile Pay

View Offline Payments

Click
View/Sync Offline Payments



Take Offline Payment

View/Sync Offline Payments

View Payment History

Logout



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EPASS Mobile Pay

View Offline Payments

List of Offline Payments

Process All Payments

Offline Payments



17-Sep-2025

Invoice Code: RS00000190
Amount: \$78.55

Process Payment

Sync

Sync All

Done

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EPASS Mobile Pay

View Payment History

Payment History

A Approved F Failed U Unknown

Date	Amount \$	Invoice Code	
A Sep 17	\$78.55	RS00000190	

Delete Payment History

Mute (m) **Done**

Payment
History

Delete
Record

Delete entire
Payment
History

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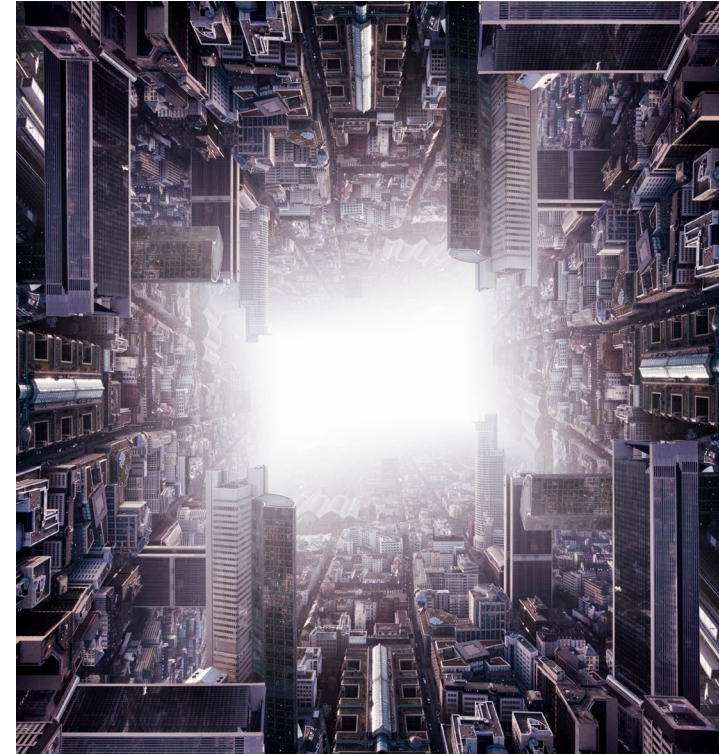
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EPASS Next-Gen

- API FIRST
 - Move business logic out of EPASS and into the API
 - Leverage FS Alliance API
- Rewire EPASS client to connect to the API
 - Will allow for serverless / cloud hosted EPASS
- Build browser-based UI and modern Apps
 - Leverage FS RetailOne



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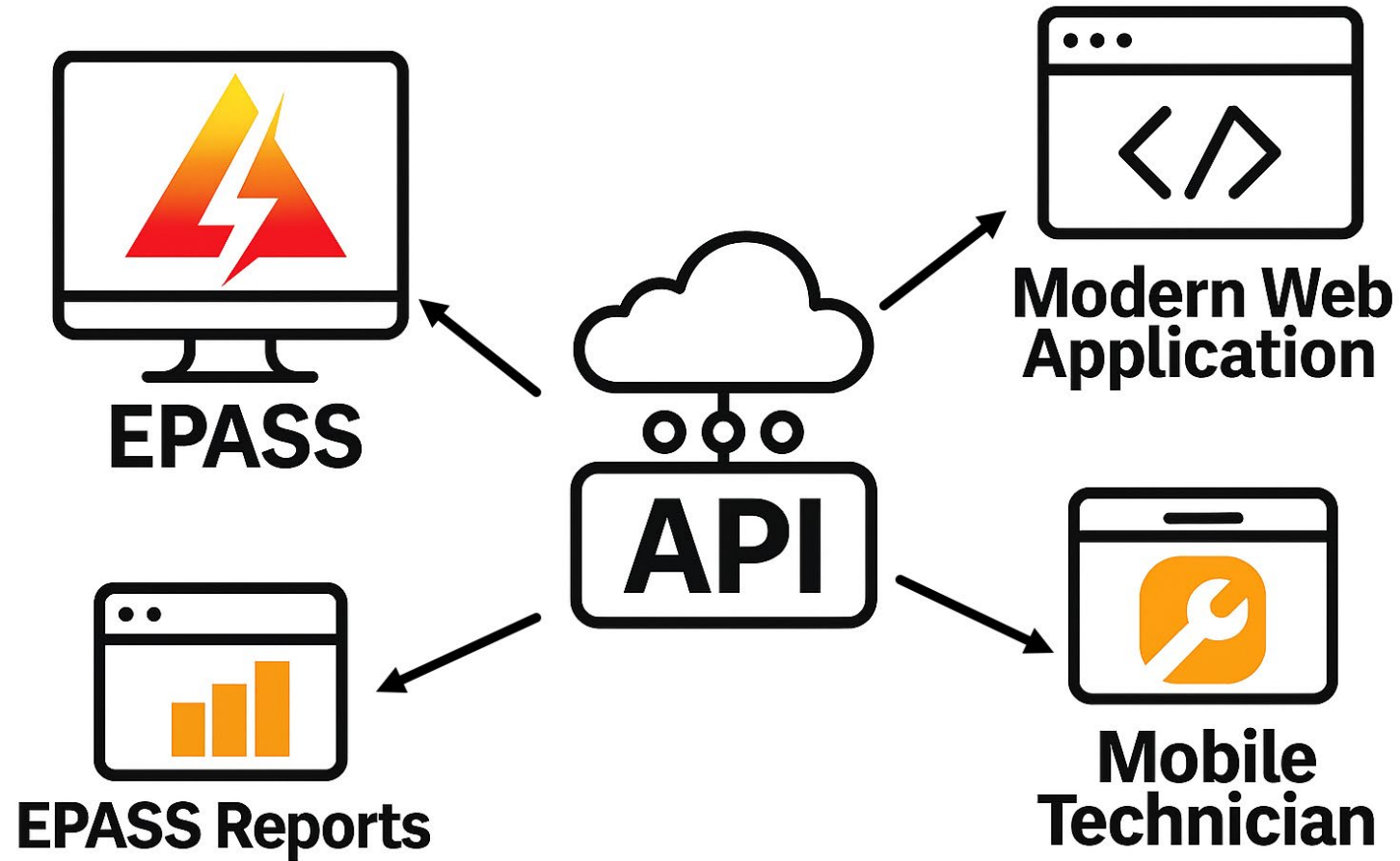
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EPASS Next-Gen



EPASS Next-Gen



2026 Roadmap

- Next-gen Development
 - New API
 - EPASS “thin client”
 - Reports migration
- EPASS Reports Dashboards
- Click to Pay v3
 - Send from Mobile Tech & Mobile Pay
 - Payments on account
 - Pay multiple invoices
- SureTrack – Terms & Conditions and Signature Capture



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MerchantTrack 2.0

- Coming to EPASS Q1 2026
- Modernized CX, including new Dashboards
- Mobile Friendly
- Improved Merchant Statements
- New reports, with filters and export options for all reports
- Chargeback Portal (Chargeback Gurus) Phase 1
 - Insight into chargebacks
 - Dispute management
 - Assist in deflecting chargebacks



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MerchantTrack 2.0

- Dashboard
- Reporting
- Transaction Search
- Capital
- Chargeback
- Virtual Terminal
- PCI Compliance
- Hardware
- Settings

Dashboard

All Filters (2) Merchants 123 Last 30 Days Transaction Status Processing Network

Transaction Amount

\$7.95M

↑ 7.70%

Transaction Count

23,180

↑ 4.85%

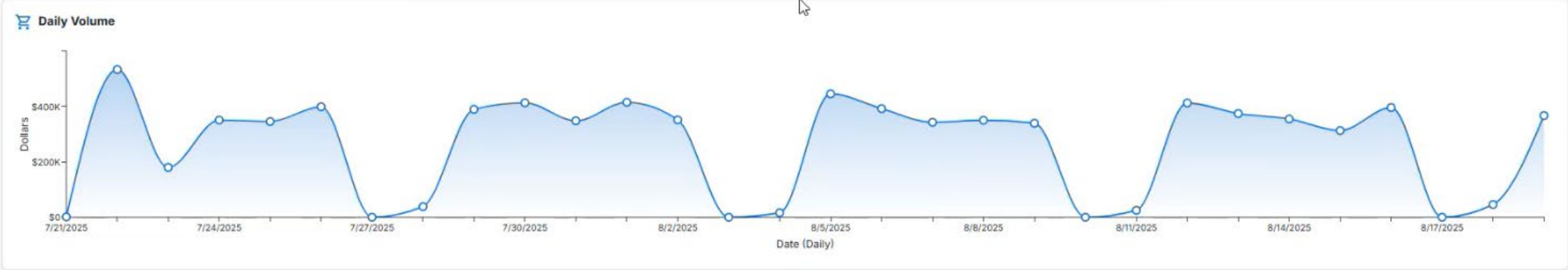
Average Ticket

\$342.84

↑ 2.72%

Capital

Learn More



Recent Funding

Merchant Name	Net Amount	Funded Date
Merchants 123	-\$94.95	7/31/2025
Merchants 123	\$37.29	7/29/2025
Merchants 123	-\$16,994.83	6/4/2025
Merchants 123	-\$4,265,101.71	3/6/2025

See More

Merchant Statement

Your summary of account funding activity, including transactions, refunds, and fees for the month.

View

Questions?



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