Set up Compatibility Settings for Eagle Auto N Series

This job aid will guide you through setting up Compatibility Settings so that you can begin using Eagle N Series.

1 Install release 24.1 and have Eagle N Series activated

1. Install Eagle Release 24.1/server level 36. The installation instructions are available at http://www.activant.com/automotive-customer-support/
2. Your Epicor Account Manager or Licensing must activate option 8888 "Eagle N Series on System" for you.

2 Set up security

1. Set the following security bits to "YES" for store managers, as well as employees that need access to Chat, Community, Analytics, and Custom Fields.

☑	N SERIES		Ability to access Chat	Yes	1,086
☑	N SERIES		Ability to maintain queries in the Eagle Analytics Query Selectors	Yes	1,087
☑	N SERIES		Ability to edit fields on the Custom Fields tab of Customer Maintena	Yes	1,088
☑	N SERIES		Ability to create/edit/delete Eagle User Defined Tabs in Tab Mainte	Yes	1,089
☑	N SERIES		Ability to edit fields on the Custom Fields tab of Inventory Maintena	Yes	1,090
☑	N SERIES		Ability to edit fields on the Custom Fields tab of Vendor Maintenanc	Yes	1,091
☑	N SERIES		Ability to access Community	Yes	1,092
☐	COMPASS		Ability to use Edit capability in New Record function	No	1,093
☐	PURCHASIN	PUR&REC	Allow access to Purchase Order Worksheet (POW)	No	1,094
☐	A/P	MVR	Ability to access and change the vendor's ACH information	No	1,095
☑	N SERIES		Ability to edit Compatibility Settings for a terminal	Yes	1,096
☑	N SERIES		Ability to edit system Option values in Compatibility Settings	Yes	1,097

2. Restart the Eagle client.

3 Set up compatibility settings

As described in the following steps, use the Compatibility Settings window to configure your Eagle to run in the new user interface.

1. From Eagle Browser, click File → Compatibility Settings. (Note: Once you begin using Eagle N Series, you launch Compatibility Settings by clicking File→Configure→Compatibility Settings.)
2. Move the desired applications to indicate that you want to launch Eagle N Series for this terminal. Be sure to repeat this process for the other terminals in the store.

- To move all applications to Eagle N Series at once for this terminal, click [icon] .
- To move selected applications to Eagle N Series, do the following:
  - Select the desired Terminal in the Terminal field.
  - Click the desired application so that it is highlighted.
  - Click [icon] to move the application to the Eagle N Series box.

- To move an application back to Eagle for Windows, click the desired application so that it is highlighted, then click ➡ to move it back.
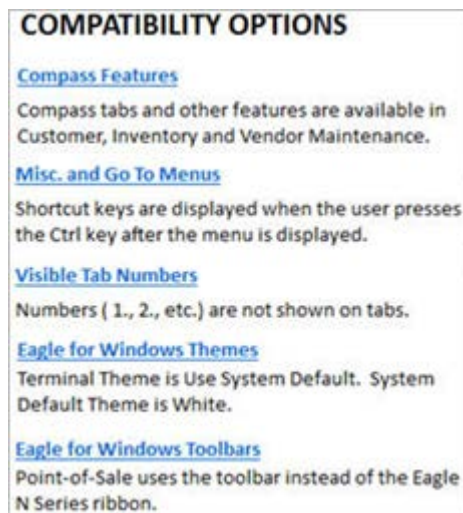
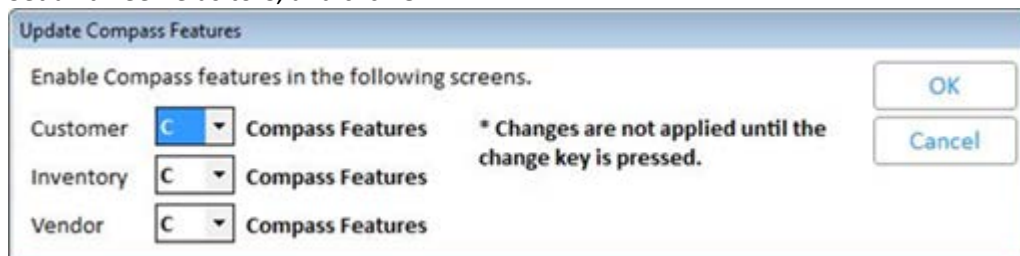3. Click Change on the toolbar to save your changes.

4 Enable Compass features

If you use Compass, you can enable Compass features in Inventory Maintenance, Customer Maintenance, and Vendor Maintenance. The Compass features include Compass tabs, tab maintenance, New Record, and Market Basket (Market Basket is in Inventory Maintenance only).

1. If you haven't yet installed the latest version of Compass during the software conversion to Release 24.1, you must do so now. Go to the General Release sftp site to download. You should also download the Compass Installation Guide located at the following web address: http://www.activant.com/automotive-customer-support/. Once you have downloaded the software and the installation guide, install the Compass software.
2. To enable Compass features, from Eagle Browser, click File → Compatibility Settings.
3. Click Compass Features.

COMPATIBILITY OPTIONS

Compass Features
Compass tabs and other features are available in Customer, Inventory and Vendor Maintenance.

Misc. and Go To Menus
Shortcut keys are displayed when the user presses the Ctrl key after the menu is displayed.

Visible Tab Numbers
Numbers (1., 2., etc.) are not shown on tabs.

Eagle for Windows Themes
Terminal Theme is Use System Default. System Default Theme is White.

Eagle for Windows Toolbars
Point-of-Sale uses the toolbar instead of the Eagle N Series ribbon.

4. Set all three fields to C, and click OK.

| **5** | **Set up other Compatibility Options** |

If needed, you can use the other Compatibility Options to set applications to retain Eagle for Windows behavior, such as displaying shortcut keys on Misc and Go To Menus, displaying numbers on tabs in applications, and displaying toolbars with F-keys instead of the Eagle N Series "ribbon." You can also select an alternate color theme by terminal for Eagle applications.

COMPATIBILITY OPTIONS

Compass Features

Compass tabs and other features are available in Customer, Inventory and Vendor Maintenance.

Misc. and Go To Menus

Shortcut keys are displayed when the user presses the Ctrl key after the menu is displayed.

Visible Tab Numbers

Numbers (1., 2., etc.) are not shown on tabs.

Eagle for Windows Themes

Terminal Theme is Use System Default. System Default Theme is White.

Eagle for Windows Toolbars

Point-of-Sale uses the toolbar instead of the Eagle N Series ribbon.

| **6** | **Complete the installation** |

1. Restart the Eagle client from Start → All Programs →Eagle → Eagle Browser to get to the new Eagle N Series.
2. Go to Options Configuration, click "change lookup" and select "N Series" in the Subsystem box. This shows how your options are set for displaying "F keys" or not, and shows your system defaults about whether your system launches Eagle N Series or Eagle for Windows in various applications.

1510	N SERIES	ATMU E4W compatibility - use toolbar with F-keys	No		System
1511	N SERIES	Catalog E4W compatibility - use toolbar with F-keys	No		System
1512	N SERIES	Customer Maintenance E4W compatibility - use toolba	No		System
1513	N SERIES	Eagle Browser E4W compatibility - use toolbar with F-k	No		System
1514	N SERIES	Inventory Maintenance E4W compatibility - use toolbar	No		System
1515	N SERIES	Point-of-Sale E4W compatibility - use toolbar with F-ke	No		System
1516	N SERIES	Purchasing E4W compatibility - use toolbar with F-key	No		System
1517	N SERIES	Received On Account E4W compatibility - use toolbar	No		System
1518	N SERIES	Vendor Maintenance E4W compatibility - use toolbar w	No		System
1530	N SERIES	A/P and G/L E4W compatibility - always launch Eagle	C=Launch E4W but allow Ea		System
1531	N SERIES	Customer Maintenance E4W compatibility - always lau	C=Launch E4W but allow Ea		System
1532	N SERIES	Catalog E4W compatibility - always launch Eagle N Se	C=Launch E4W but allow Ea		System
1533	N SERIES	Eagle Browser E4W compatibility - always launch Eagl	C=Launch E4W but allow Ea		System
1534	N SERIES	Inventory Maintenance E4W compatibility - always lau	C=Launch E4W but allow Ea		System
1535	N SERIES	Point-of-Sale E4W compatibility - always launch Eagle	C=Launch E4W but allow Ea		System
1536	N SERIES	Purchasing & Receiving E4W compatibility - always la	C=Launch E4W but allow Ea		System
1537	N SERIES	Received On Account E4W compatibility - always laun	C=Launch E4W but allow Ea		System
1538	N SERIES	Vendor Maintenance E4W compatibility - always launc	C=Launch E4W but allow Ea		System

3. Delete all desktop, taskbar, and start menu shortcuts and re-add them from the All Programs menu to get to Eagle N Series.
4. Start Inventory Maintenance or Customer Maintenance, and enter an item or customer. Verify that the User Defined Fields tab and the Analytics tab display. If the Analytics tab does not display, you must install the most current version of Compass. For more information, see section 4, step 1, above.