

Epicor[®] Eagle[®] EMV Implementation Guide

Step-by-step
Revised September 2017

EPICOR[®]

This Guide summarizes actions we believe you must follow to make your Eagle system EMV enabled as of the date of publication (September 2017). The information to this guide will not guarantee that you will be EMV compliant. There are factors outside of our control, including changes to credit card rules, changes and updates to hardware and software products, and changes to payment processing services, that could affect these instructions. We do not commit to update these instructions. Use of this document is subject to and governed by the terms and conditions of your master customer agreement (or similar license or service agreement) you have entered into with us. The contents of this document are for informational purposes only and are subject to change without notice. Epicor Software Corporation makes no guarantee, representations or warranties with regard to the enclosed information and specifically disclaims, to the full extent of the law, any applicable implied warranties, such as fitness for a particular purpose, merchantability, satisfactory quality or reasonable skill and care. This document and its contents, including the viewpoints, dates and functional content expressed herein are believed to be accurate as of its date of publication, September 2017. The usage of any Epicor software shall be pursuant to the applicable end user license agreement and the performance of any consulting services by Epicor personnel shall be pursuant to applicable standard services terms and conditions. Usage of the solution(s) described in this document with other Epicor software or third party products may require the purchase of licenses for such other products. Epicor, the Epicor logo, and are trademarks of Epicor Software Corporation, registered in the United States and other countries. All other marks are owned by their respective owners. Copyright © 2017 Epicor Software Corporation. All rights reserved.

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Introduction

This guide will provide step by step instructions to implement EMV with Eagle. This guide is only for integrated bankcard processing with Eagle.

The EMV implementation process is more complex than just turning on a flag. Because of the security requirements for EMV there are many steps Epicor and the customer need to go through in order to implement EMV, so this process will be a managed conversion process after Release 25.1, update 25.1900.94 or higher is loaded.

There will be some instances where your PIN pad does not contain a debit key or we will not have the debit key that matches your bank. If that is the case, then you will have three choices to implement EMV:

- ▶ Move to Epicor Payment Exchange
- ▶ Move your banking relationship to a bank with a debit key that Epicor supports.
- ▶ Exchange your iSC250 PIN pad for one that contains the proper debit encryption key. This is in the case where your unit does not contain an encryption key or you do not support debit today and the key in your unit does not match your existing card payment process. Please note that there is a fee charged for this service.

Contact your Epicor Local Platform Specialist to order the debit encryption – Because you don't have a bank and processor matched debit encryption key or no debit encryption key, you will need to contact you Epicor Local Platform Specialist and get an order in to swap your iSC250 with units that have a debit encryption key.

Note: If you are doing PIN debit today and process cards through one of the EMV supported processors (FDMS, Global, RBS Worldpay or Paymentech) but your units were not purchased from Epicor or the Ace program, you should be able to upgrade the PIN pad to RBA 15.05 or higher and support EMV on Release 25.1, update 25.1900.94 or higher. However, in the coming years you will no longer be able to update your iSC250 PIN pad to newer versions of the RBA without an update from your PIN pad provider.

Your Hardware Service Specialist (HSS) will be your primary contact for this EMV conversion. The HSS can provide you with pricing on a Time and Materials basis if you want to share responsibilities on the EMV tasks.

Prerequisites

- 1. Before beginning on the path, you should have the following completed:**
 - Vista/bedcheck enabled (see appendix for job aid)
 - Processing through the Epicor Gateway
 - Have debit encryption on all ISC250 PIN pads. You do not need to have purchased PIN-based debit from Epicor but still need to have all iSC250s loaded with a debit encryption key.
- 2. Do you have Windows XP Eagle clients?** – Windows XP PCs are at the end of support by Microsoft and will require patches, software additions and other configurations to have them ready to run and EMV terminal. In addition, because the Windows XP operating system is unsupported and no longer receiving security updates, this PC would be considered non-PCI compliant. **Recommendation – Replace the XP PCs before updating to EMV or get a quote from the HSS to update the PC to be ready for EMV.**
- 3. Take Release 25.1, update 25.1900.94 or higher training and get Release 25.1, update 25.1900.94 or higher discs** - Eagle Release 25.1, update 25.1900.94 is the minimum required version of Eagle to be able to implement EMV. You can [click here](#) to take the training. After you have completed the training, the software will automatically be sent to you or if you are hosted, the Eagle Hosting team will contact you to schedule the update.
- 4. Install Release 25.1, update 25.1900.94 or higher (including eConnect basic setup)** – After receiving the Release 25, update 25.1900.94 or higher disc, please install them on your Eagle server and clients. If you do not have eConnect previously installed on your clients, the Release 25.1, update 25.1900.94 or higher client disc will automatically install a basic version of eConnect. The basic version of eConnect is required to allow Epicor to collect information from the iSC250 PIN pads for future updates. If you already have eConnect installed, eConnect will be updated to 3.0256.001 or higher when Release 25.1, update 25.1900.94 or higher is installed.
- 5. EMV Overview and Set up Training** - Review Training on Demand EMV Course Suite, specific modules “EMV Overview” and “EMV Set Up,” located here.
- 6. Verify Patches Installed** – Verify that the following patches / version are installed on your system. The patches should automatically download and install the night after you have installed Release 25.1, update 25.1900.94 or higher. You can check if these patches are installed by going to Secure Access and typing in “PCO”
 - EMV General patch 7845 v3 (or higher)
 - Processor specific patches. If you are using this processor, please check you have the specific processor patch
 - o EPX or FDMS: Patch 6820 V49 (or higher)
 - o Global: Patch 6837 V82 (or higher)
 - o Paymentech: Patch 7026 V40 (or higher)
 - o RBSWorldpay: Patch 6848 v57 (or higher)

Updating the PIN Pad to RBA 15.05 or higher

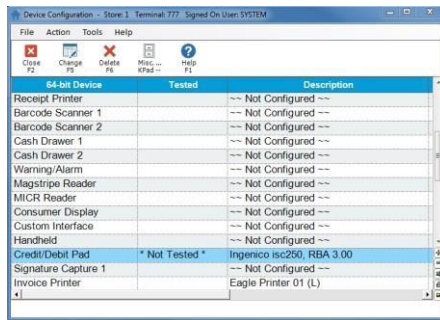
- Open Device Configuration to Configure the PIN Pad – For every station with an iSC250, you will need to perform steps 6 to 18 to update the iSC250 firmware to RBA 15.05 or higher. Additionally RBA 15.05 or higher and eConnect 3.0256.001 allows Epicor to collect information from your iSC250 PIN pads that will be required for updates in the future.

Notes:

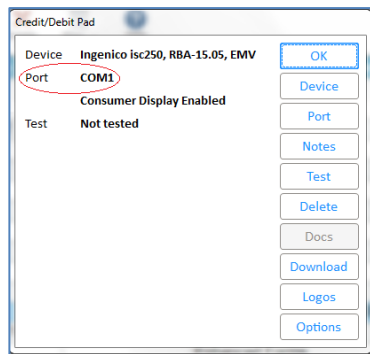
- When you open Device Configuration, make sure that Point-Of-Sale (POS) is NOT open. Otherwise you will have device conflict issues as both programs take ownership of the device(s).
- We recommend using choosing RBA 17.01 if you are on Release 26 or higher.

Attention Epicor® Eagle® Customers: As you update your Ingenico iSC250 PIN pad for EMV, it is critically important that you do NOT download “Ingenico iSC250, RBA-17.02, EMV, PED with KP4 KEY only”. If you download this version by mistake, it may cause the PIN pad to be non-functional

- In Device Configuration highlight the Credit / Debit Pad line and double click.

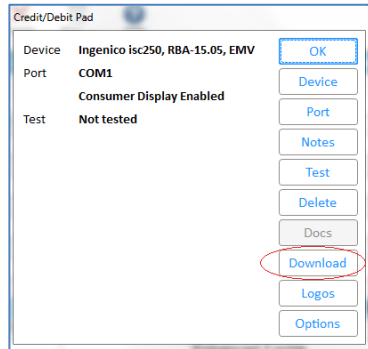


- Write down the com port of the exiting device** – Before you change your PIN pad device to the new RBA you will want to confirm the PIN pad com port setting. Once you change the PIN pad RBA version the com port may be reset. Making note of the current setting in the device configuration screen before you begin will save you a lot of time and frustration.

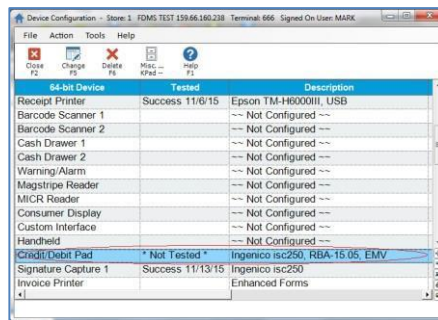


- Choose Ingenico iSC250 - RBA 15.05 or higher EMV** – Click the Device button from the above screen. To configure the PIN pad RBA version: choose Ingenico isc250, RBA - 15.05 or higher, EMV and press OK.

14. **Run download process** – After choosing RBA 15.05 or higher and pressing OK you will come back to the PIN pad device configuration screen. Click the “Download” button to download and update the PIN pad to the new version of RBA. Depending on the current RBA version this may take 5 minutes (RBA 3.0 or higher to RBA 15.05 or higher) or 1 hour (RBA 2.3 to RBA 15.05 or higher).



15. **Did update work?** – When the update is complete the PIN pad will reboot and return to the idle screen displaying either your logo or the Epicor logo. Device configuration will show RBA 15.05 or higher on the credit / debit PIN pad line.

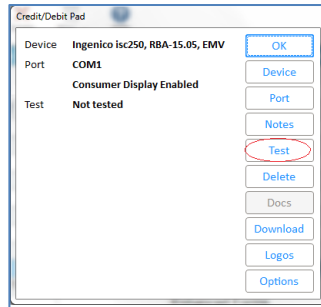


In rare instances, the download may fail. If so, redo steps 4 to 12 and if it still fails, contact your HSS because we may need to send a replacement PIN pad.

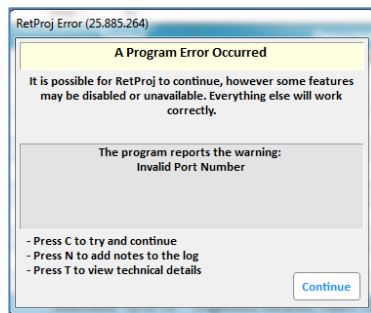
Testing the PIN Pad

At this point the PIN pad has been updated to RBA 15.05 or higher. Next, test the PIN pad before going to the next step. To test the PIN pad you will need a credit card.

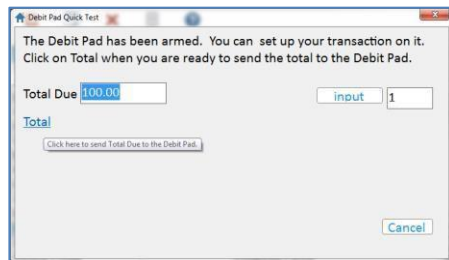
16. **Test Mode**– Click on the Test button in the PIN Pad Device configuration screen.



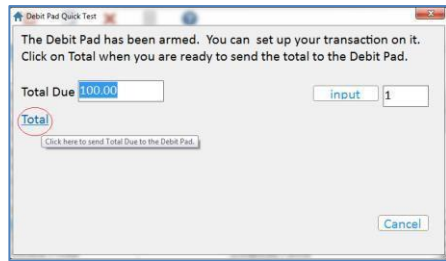
17. **Test Screen Error**– If you see an error message you likely do not have the com port configured properly. Once you have verified the com port is configured properly and you still receive an error message power reset the PIN pad and reboot the PC then try the test process again. If you still have issues contact your HSS.



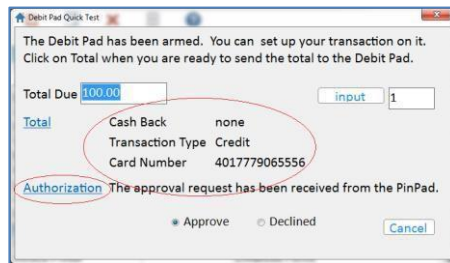
18. **Test Screen** - The test screen will display on your terminal and the PIN pad will come to the please select card type screen. Select Credit Card on the PIN pad and then swipe your card.



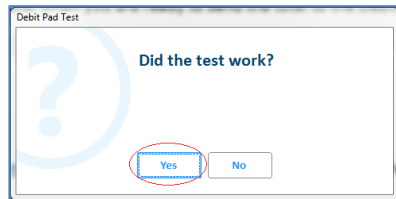
19. **Total the Transaction** – The PIN pad will give you a message to please wait. Click the Total link on the Test screen. The PIN pad will now display a message to verify the amount of \$ 100.00.



20. **Ok the Amount** – OK the amount on the PIN pad. The Test Screen will display test transaction specific information. Click the Authorization link on the screen to send an approved message back to the PIN pad.



21. **Test Complete** – The Test Screen will display a message asking if test worked. Select Yes.



22. **Device Configuration Test Successful** – In the device configuration screen you will see the word success and the date in the test column for the RBA 15.05 or higher version of the Credit/Debit PIN Pad device.

| 84-bit Device | Tested | Description |
|-------------------------|------------------------|--|
| Receipt Printer | Success 11/6/15 | Epson TM-H6000III, USB |
| Barcode Scanner 1 | ~ Not Configured ~ | |
| Barcode Scanner 2 | ~ Not Configured ~ | |
| Cash Drawer 1 | ~ Not Configured ~ | |
| Cash Drawer 2 | ~ Not Configured ~ | |
| Warning/Alarm | ~ Not Configured ~ | |
| Magstripe Reader | ~ Not Configured ~ | |
| MICR Reader | ~ Not Configured ~ | |
| Consumer Display | ~ Not Configured ~ | |
| Custom Interface | ~ Not Configured ~ | |
| Handheld | ~ Not Configured ~ | |
| Credit/Debit Pad | Success 12/5/15 | Ingenico isc250, RBA-15.05, EMV |
| Signature Capture 1 | Success 11/13/15 | Ingenico isc250 |
| Invoice Printer | | Enhanced Forms |

Congratulations, you have successfully updated your PIN pad to RBA 15.05 or higher. Once you have updated all of your PIN pads to RBA 15.05 or higher you will be ready to proceed with the EMV implementation process.

EMV Setup and Configuration

Now that you have updated your PIN pads to RBA 15.05 or higher it is time to configure EMV on your system, review training materials and load the EMV configuration onto your PIN pads. The following steps describe how to turn on EMV on your system, where to go to receive EMV training and the final PIN pad configuration needed to support EMV.

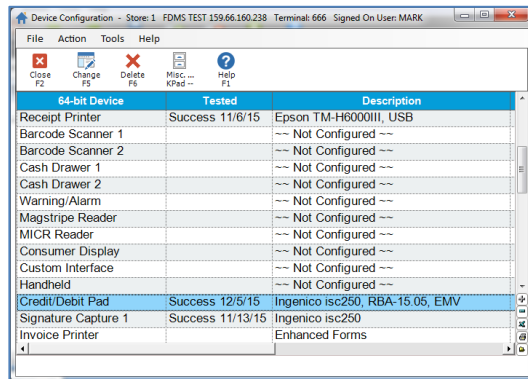
Recommend you convert one iSC250 to EMV and process for 1 week before converting all the iSC250s in your store or company.

23. **EMV Use Training** – Review Training on Demand EMV Course Suite, specific module “Using EMV,” located here.
24. **Turn on EMV Option 1346** – Contact your Epicor Local Platform Specialist to place an order to turn on MSY Option 1346, which is the EMV option. Epicor licensing will contact you to turn on this MSY option. Expected licensing will be 5 days.
25. Set the following options:
 - Option 5127 – Set to “Y” for most retailers or “E” for FSA or EBT retailers. This allows debit bin range checking on System for EMV cards. This is not Debit steering. Not required for Release 26 or higher
 - Option 5129 – Set to “Y”. This allows debit bin range checking in POS
 - Option 5498 – Set to “Y”. This defaults pin pad to allow insertion of card first.
 - Option 1670 – Set to “Y”, This will allow a consumer to bypass the EMV PIN number and have the pin pad ask for a signature instead if the EMV card allows
 - Option 1671 –
 - o Set this option to YES, if you have PIN Debit processing. Setting this option to YES will force the pin pad to use U.S. Debit (PIN based debit) first and allow cashback. In Release 26, you also can “fallback” to signature debit (VISA Debit or MasterCard Debit) if the consumer presses the green “ENTER” button on pin pad. The pin pad will then ask for a signature instead of a PIN.
 - o Set this option to No, if you don’t have PIN Debit processing and all debit will be process as signature debit (VISA Debit or MasterCard Debit) and the consumer can answer YES to the first screen.
 - Please review the extended description in Options below for more information.

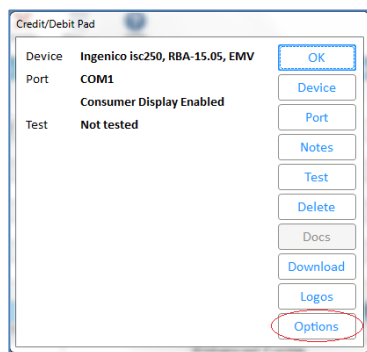


- MSE 1123 – EMV allow fall back to mag swipe. Note - Fallback from EMV to swipe for an EMV card will cause the liability to shift to the retailer.
 - o Security bit = Yes allows the clerk to choose fall back to mag stripe if the EMV chip does not function (higher risk)
 - o Security bit = No does not allow the clerk to choose fall back to mag strip w/o manager override

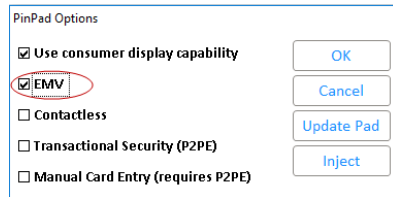
26. **Open Device Configuration** - Go to Device Configuration and highlight the Credit/Debit Pad row and double click on the row.



27. **Click Options** – In the Credit / Debit Pad device configuration screen click the Options button.



28. **Set the PIN Pad for EMV mode** – In the PIN Pad Options screen check the EMV box and press OK. Pressing OK returns the screen to the PIN Pad Configuration screen.



PinPad Options

Use consumer display capability

EMV

Contactless

Transactional Security (P2PE)

Manual Card Entry (requires P2PE)

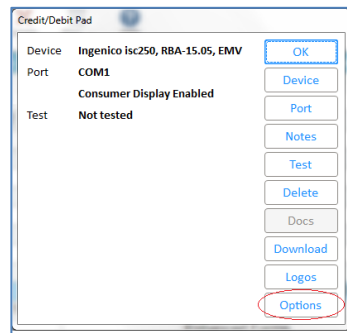
OK

Cancel

Update Pad

Inject

29. **Click Options** – After you have set the PIN pad to EMV mode you will need to download the EMV configuration file. This is done in the PIN pad options screen. From the PIN pad configuration screen click the options button.



Credit/Debit Pad

Device: Ingenico isc250, RBA-15.05, EMV

Port: COM1

Test: Not tested

Consumer Display Enabled

OK

Device

Port

Notes

Test

Delete

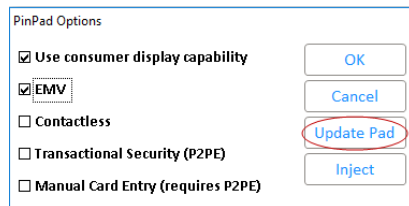
Docs

Download

Logos

Options

30. **Download EMV configuration file** – Once the PIN pad has been EMV enabled an EMV configuration file needs to be loaded onto the device. In the PIN pad options screen click on the Update Pad to download the EMV configuration file to the PIN pad. When this is done the screen will return to the device configuration screen.



PinPad Options

Use consumer display capability

EMV

Contactless

Transactional Security (P2PE)

Manual Card Entry (requires P2PE)

OK

Cancel

Update Pad

Inject

31. **Did EMV Setup Succeed?** – If you did not have any errors in this part of the procedure, your EMV setup and configuration has succeeded. If not, please contact your HSS for assistance.
32. **Complete the process** – to enable EMV and download the EMV configuration file on each PIN pad in your store. Your system and your POS stations are now ready to perform EMV transactions.

Congratulations, you have completed the Eagle EMV Implementation! If you have any additional questions on EMV, please contact your HSS for assistance.

Thank you for being an Epicor Eagle Customer.

Using the checklist below, ensure the success of your EMV Implementation by confirming that each step is completed prior to moving on to the next. If you are unsure about any of the items listed, contact your Epicor Eagle Local Platform Specialist.

| Step | EMV Checklist | Done |
|---------|---|------|
| 1 | Confirm with my Epicor Local Platform Specialist that my PIN pads contain a debit key. | |
| 1 | Vista/bedcheck has been enabled (See Job Aid.) | |
| 1 | You are processing Credit Card Activity through the Epicor Gateway. | |
| 2 | Verify that all PCs are running Windows 7 or higher. | |
| 3 | Complete the Release 25.1, update 25.1900.94 or higher Online Training, which can be found here . | |
| 4 | Install Release 25.1, update 25.1900.94 or higher, including eConnect basic setup. | |
| 5 | Review Training on Demand EMV Course Suite, specific modules "EMV Overview" and "EMV Set Up" located here . | |
| 6 | Confirm you have your specific processor patch. | |
| 7 - 8 | Write down the com port of each existing iSC250 PIN pad in the chart provided. | |
| 9 - 14 | Update each PIN pad with the iSC250 firmware to RBA 15.05 or higher using the Epicor Eagle EMV Implementation Guide. | |
| 15 -21 | Run a test transaction with a credit card. | |
| 22 | Review Training on Demand EMV Course Suite, specific module "Using EMV" located here . | |
| 23 | Turn on EMV Option 1346. | |
| 24 - 29 | Convert ONE iSC250 PIN pad to EMV and process for one week. | |
| 30 | Complete the process to enable EMV on each PIN pad in your store. | |

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit www.epicor.com.



Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA

Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Bldv. Antonio L. Rodriguez #1882 Int.104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico

Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom

Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore

Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia

Phone: +61.2.9927.6200
Fax: +61.2.9927.6298