

Tablet POS 2.0 Setup

Tablet Point of Sale 2.0 is easy to install on your wireless device.

In this course we will show you how to download the app, set up your User Identification, obtain Administrator Approval, and configure the Image Server and Help function.

Before you begin, download the Tablet POS Install and Setup Guide to make sure you have met the necessary prerequisites.

Then, on your device, navigate to the App Store icon and open it.

Search for the word 'Epicor'.

Tap the 'Tablet Point of Sale' icon.

Download the Tablet POS Application.

The licensing screen displays.

Read the license agreement and select Agree.

Close the application when done.

Open the Settings function.

Scroll down to 'Tablet POS' on the left side of screen and select it.

In the Identification section on the right side of the screen, tap each field to enter the following information.

First and Last Name, Customer Number, your Eagle User Name and Eagle Password, the Lock-in Store, your Phone Number and your Email address.

Return to the Home Screen.

You will need to start the Tablet POS application once you have entered the Identification information and before you receive administrator approval.

If Tablet POS is not started, the Administrator will not see your device in the list for approval.

After the Administrator has approved your mobile device, you will be able to access Tablet POS.

If you are the Administrator of mobile devices in your business, you must approve employee access to the store's Eagle data by going to the Epicor licensing site or via the Mobile Admin App.

To use the licensing site go to this URL.

<https://eaglesoa.com/customer>.

Log in with your Epicor customer number and password.

If this is your first time using this site, leave the Password field blank to create one.

Click Log In.

The following screen displays a list of mobile devices.

The administrator must look at the list, and approve or delete access.

Open Settings and navigate to Tablet POS on the left side of the screen.

In the Image Server section, tap the Affiliate Field.

In the Affiliate section, select the appropriate Affiliate, or choose None.

Enter your Affiliate account number in the 'Customer ID' field if applicable.

Tap the Back Button and your changes will be saved.

In the Settings, 'Help' section, update the Show 'Quick Launch' and Show 'Coach Notes' settings.

Quick Launch allows you to easily go to point of sale, look up an item, add a customer, or go directly to customer look-up with just one touch.

This saves steps and time once you learn the application.

If Quick Launch is set to Off, you are taken directly to Point of Sale.

Transparent Help, or Coach Notes are particularly useful for first-time users. They guides you with help as you use the application.

The Coach note is an overlay that highlights various functionalities when Tablet POS is launched.

Once you are familiar with Tablet POS, you can turn off the Coach Notes in Settings.

Setting up Eagle Tablet POS 2.0 is simple if you follow the process in order. Begin by installing the application, then set up your User Identification and obtain Administrator Approval.

Once those steps are complete just configure the Image Server information and toggle on the Help settings.



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