




EPICOR.
Tablet POS
Installation & Setup Guide
Version 2.0



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Document No. EL8040-02
Publication Date: August 2013

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Welcome to Tablet Point of Sale

Tablet Point of Sale (Tablet POS) is a mobile point-of-sale solution (Version 1 is iPad only) that allows retailers to quickly look up items, look up customers, and perform simple retail checkout anywhere there is a WiFi or cellular connection to the internet. With Tablet POS, you can quickly scan items, perform a credit card or house account checkout, and print or email the receipt to the customer.

Features

Tablet POS has the added feature of taking credit cards. Tablet POS has many other features that can make point of sale easy and quick. These features include:

- Operating a portable point of sale on an iPad
- Reducing lines at checkout with LineBuster
- Browsing inventory and viewing images
- Completing checkout for non-cash customers by:
 - swiping key card numbers
 - capturing customer signatures
 - printing receipts or invoices
 - providing customers with an email receipt

Preparing for Installation of Tablet POS

Software Requirements

- TFP Database – with all files (MSY option 2001 is set to Yes)
- Role-Based Security (option 550 is set to Yes)
- Standard Eagle-based invoice printing to MPS network printers
- Eagle for Windows release 22 or higher (Some features will require Eagle 25.1 or higher)
- WiFi or Cellular internet connection

Hardware Requirements

- iPad with iOS 8.0 or higher
- (Optional) Receipt Printers
 - Wireless - Epson P60II WiFi mobile receipt printer. This printer only works in WiFi mode (not Cellular mode) so you will need WiFi.
 - Wireless - Zebra QL320 WiFi receipt printer w/WiFi
 - Wired - Epson TM-T88V network receipt printer. This is a wired receipt printer that needs to be plugged into an Ethernet jack.
- (Optional) Scanner
 - Bluetooth Socket 7Xi barcode scanner
- (Optional) Credit Card Reader (Ingenico iSMP)
 - If you use Epicor Payment Exchange for Tablet POS credit card processing, you will need the Ingenico iSMP available from Epicor OR you can enter the credit card information manually for Epicor Payment Exchange.
 - If you use Authorize.net, you will need to enter credit card information manually because no encrypted credit card MSR exists.

Remote Epicor Set-Up Requirements

To connect Tablet POS to your Eagle server, Epicor must configure your firewall and allow access from your Eagle to Epicor's datacenter. This is done remotely after the service has been ordered. You will be notified after setup is complete.

Support During Installation

If you would like to have Epicor perform the Tablet POS installation, please contact your Local Platform Specialist (LPS) for a quote. If you encounter errors during installation, please call the Eagle Advice Line at **1-800-322-3077**. When contacting the Advice Line, be sure to have the following information handy:

- Your customer number and store name
- The business application you are using (Eagle for Windows, etc.)
- The Tablet POS version number
- Description of the problem, including any error messages

Setting Up Tablet POS Security & Options

Tablet POS can assist in quick checkout for simple sales/orders. It is not a full version of Point of Sale and does not have the ability to do manager overrides. It only supports the Point-of-Sale security bits functionality as listed below.

Security Bits

To make sure that Tablet POS runs correctly, set up the following security bits on the Security Maintenance window. To access this window, do the following:

1. Open the Eagle Browser.
2. In the Launch bar, type RBS, and press Enter. The Role Based Security Maintenance window displays.
3. In the Role Based Security Maintenance window, find the security bits below and change the settings accordingly.

Security Bit 531- Allow transaction for customer who is past due

If you set this bit to Yes, the past due warning displays. When the clerk totals the transaction, they can save or select Pay on Account or Credit Card Charge (if these are set up).

If you set this bit to No, the past due warning still displays. When the clerk totals the transaction, they can save or select Credit Card Charge (if this is set up).

Security Bit 532 - Allow transaction for customer who is over credit limit

If you set this bit to Yes, the “over credit limit” warning displays. When the clerk totals the transaction, they can save or select pay on Account or Credit Card Charge (if these are set up).

If you set this bit to No, the “over credit limit warning” still displays. When the clerk totals the transaction, they can save or select Credit Card Charge (if this is set up).

Security Bit 536 - Allow override of price less than cost message

If you set this bit to Yes, the Tablet POS Item Information window displays the Discount button.

If you set this bit to No, the Tablet POS Item Information window does not display the Discount button.

Security Bit 817 - Ability to manually type in a different price

If you set this bit to Yes, the Tablet POS Item Information window displays the Discount button.

If you set this bit to No, the Tablet POS Item Information window does not display the Discount button.

Security Bit 622 - Ability to continue when posted quantity is insufficient

If this bit is set to Yes, Tablet POS still posts and/or sells the item, regardless of whether the quantity available is sufficient.

If this bit is set to No, Tablet POS does not post and/or sell the item due to insufficient quantity.

Options

To make sure that Tablet POS runs correctly, certain options must be set up in Options Configuration.

Options Set Up by an Epicor Representative

Option 2001 - Compass Database on System.

This option must be set to T or Y.

Option 1028 - Compass Web Services Platform on System.

This option must be set to Y.

Options Set Up by You

Set up the following options in Options Configuration. To access this window, do the following:

1. Open the Eagle Browser.
2. In the Launch bar, type OPT, and press Enter. The Options Configuration window displays.
3. In the Options Configuration window, find the options listed below, and change the settings according to the information below.

Comment [WU1]: Page break, maybe the spreadsheet charts like we have in other TOD courses that list the Bit or Option ID kind of like a checklist

Option 1191 - Mobile Point of Sale Listener 1 of 3.

During the setup of Tablet POS, an invoice printer similar to the iNet Invoice Printer must be set up. For every transaction that is processed in Tablet POS, an invoice prints. Option 1191 "Mobile Point-of-Sale Listener 1 of 3" must indicate the printer number to which invoices will print. At this time, you can only have one invoice Listener for Tablet POS.

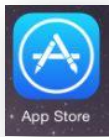
Option 9835 - Alternate Tender Code for Credit and Debit Cards with Mobile POS Code.

This option determines the tender code used when a customer pays with a credit or debit card in Tablet POS. The tender code used must correspond to a tender type you set up as "Other." For example, if you set Alternate Tender type 6 to "Other" (in option 5616), set this option to "6-Alternate Tender 6."

Installing Tablet POS from the App Store

Installing the Tablet POS application to your iPad is quick and easy.

1. Tap the App Store icon.



2. Search for "Epicor."



3. Tap the Tablet POS icon.
4. Download the Tablet POS Application. The licensing screen displays.

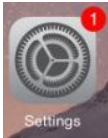


5. Read the license agreement.
6. Select Agree.
7. Close the application, and then continue with the next section "Setting Up Tablet POS Fields."

Setting Up Tablet POS Fields

To start setting up the fields in Tablet POS, do the following:

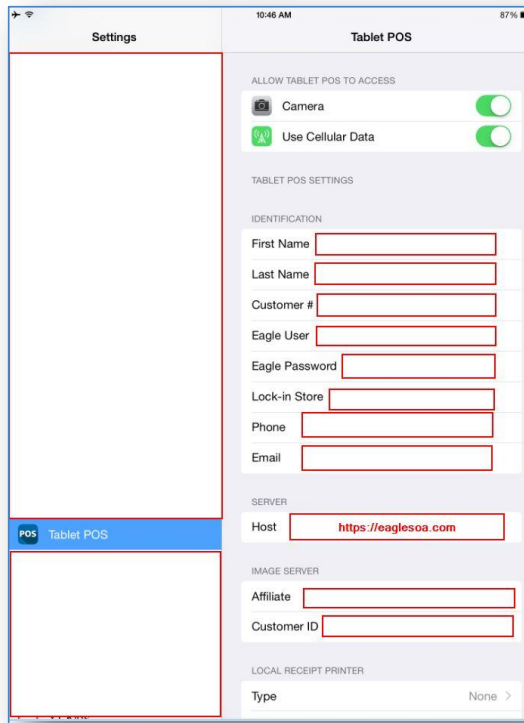
1. Select your iOS settings from your iPad.



2. Scroll to Tablet POS, and tap to select it. The following screen displays. In the Tablet POS section on the right, tap each field and enter information with the built-in keyboard.

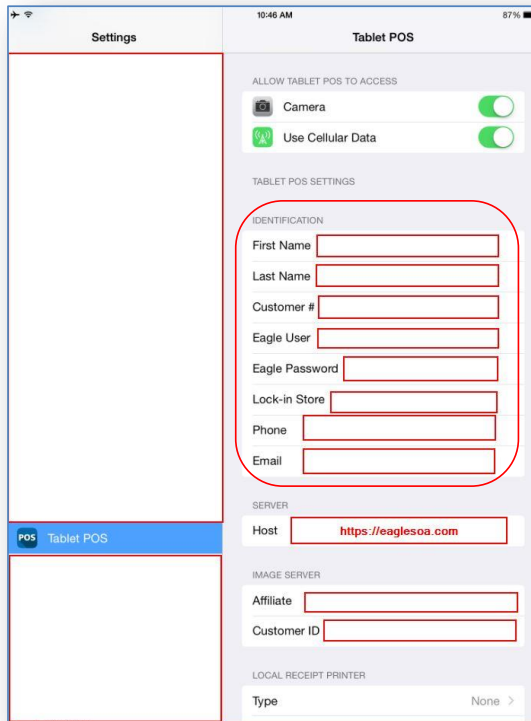
You will set up the account with the following sections of information:

- Allow Tablet POS To Access
- Identification
- Server (confirm settings as shown)
- Image Server Information
- Printers & Scanners
- Payment Credentials
- Help



Setting Up User Identification

1. In Settings, tap Tablet POS on the left side of screen. The following screen displays.



2. In the Identification section on the right side of the screen, tap the field where you want to enter information.
3. Enter the following:
 - First and Last Name
 - Customer Number
 - Eagle User Name and Password
 - Lock-in Store
 - Phone Number
 - Email address

IMPORTANT

Start the Tablet POS application once you have entered all the set-up information and before you set up administrator approval. If it is not started, you will not see your device in the list and you will not be able to approve.

4. Make sure you have an internet connection, go back to Tablet POS and start it.
5. Inform your Administrator of your mobile devices to approve your access to the store's Eagle data. After the Administrator has approved your mobile device, you will be able to access Tablet POS.

Setting Up Administrator Approval

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**.

Comment [WU2]: I didn't see anything specifically called this in the apple store. It was called Epicor Mobile Field Service???

1. To set up licensing, go to <https://eaglesoa.com/customer>. The following screen displays.



2. Log in with your Epicor customer number and password. If this is your first time setting up, you must select a password.
3. Click Log In. The following screen displays a list of mobile devices.

Tablet Point of Sale - Licenses: 5 In use: 0

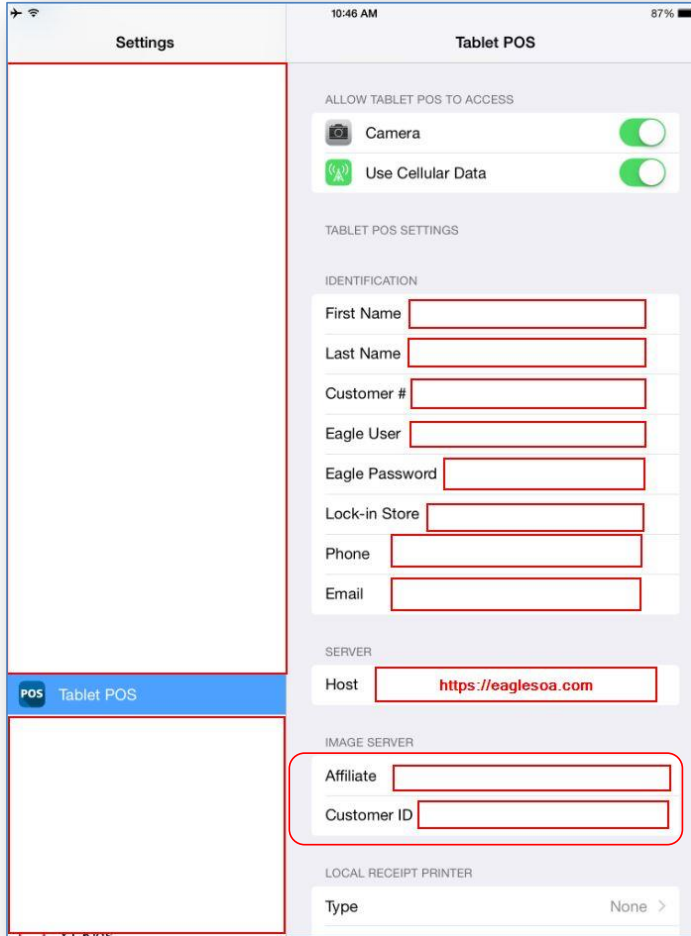
Name	Phone	Eagle User	Device ID	Device	Status	Access Date	Enabled?	Delete
Lisa Montgomery	*****	LISA	*****	iPhone	Pending	04/19/13 10:44 CDT	<input type="checkbox"/>	Delete

Apply Changes

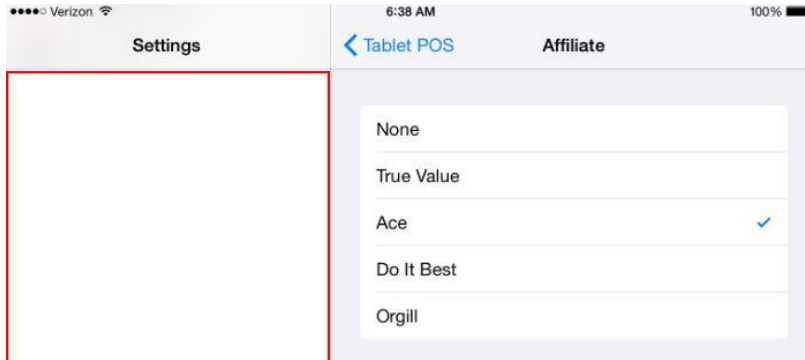
4. The administrator must look at the list, and approve or delete access.

Setting Up Image Server Information

1. In Settings, tap Tablet POS on the left side of the screen. The following screen displays.



2. In the Image Server section, tap the Affiliate Field. The following screen displays.



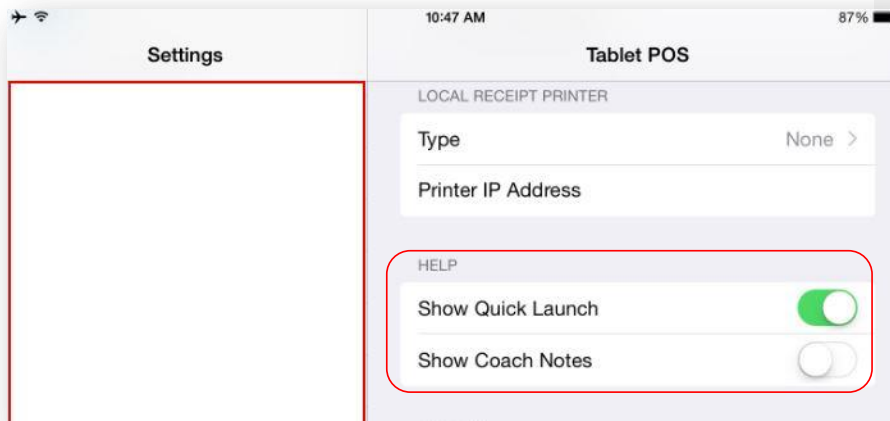
3. In the Affiliate section, select the appropriate Affiliate, or select None. Affiliates include:

- True Value
- Ace
- Do it Best
- Orgill

Comment [WU3]: Do they need to add their Customer ID?

Setting Up Help

1. In Settings, tap Tablet POS on the left side of the screen. The following screen displays.



2. In the Help section, select to have QuickLaunch and Transparent Help set to ON or OFF.

QuickLaunch 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 QuickLaunch is set to OFF, you are taken directly to point of sale.

Transparent Help (or Show Coach Notes) is particularly useful for first-time users, because it 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 Payment Credentials and Credit Card Reader

This feature allows you to set up processing for credit cards. Note the following prerequisites:

Epicor Payment Exchange Users – You will need to contact the Epicor Payment Exchange sales and operations team to ensure you have a mobile processing Merchant ID setup and corresponding credentials.

Authorize.net Users – You will need to contact Authorize.Net to setup your account and associate with your processor.

It is important to keep in mind that Tablet POS credit card processing **does not send any credit card data to the Eagle**. Instead, the credit card tendering occurs between the tablet and the processor. Tracking information is passed with the transaction. To accurately and separately track Tablet POS credit card transactions, use option 9835 “Alternate Tender Type for Tablet Point of Sale” to set all Tablet POS tender type codes to a unique alternate tender. This option was already described in the Options section at the beginning of this document.

NOTE

Epicor Payment Exchange Setup

If you choose Epicor Payment Exchange for payment processing, follow the steps below.

NOTE

The Epicor Payment Exchange team provides you with the following information which is required for Tablet POS Swipe and Manual Credit Card Setup. In order to proceed you will need the following information:

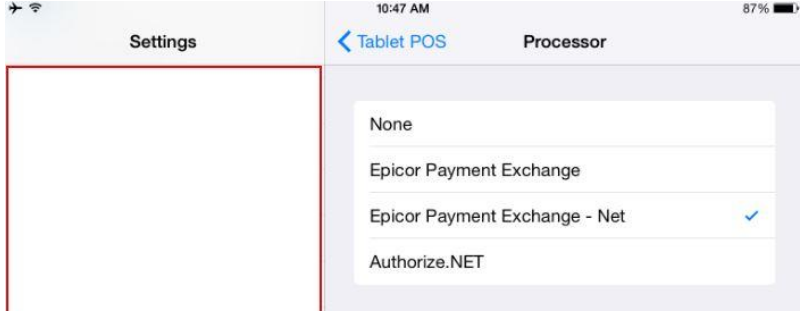
Manual Credentials

- Gateway (from Payeezy setup)
- Transaction Key (from Payeezy setup)
- Payment Page ID (from Payeezy setup)

Swipe Credentials

- MID – Merchant Specific
- TID – Merchant Specific
- TPP ID – Set to REP011
- Group ID – Set to 10001 (Set by PD will always be the same)
- Device ID – Set to 001 (Or a number of your choice. Used to track the device when using multiple with the same merchant ID)
- Cashier – Merchant Specific (Default person's name who is running the transactions)

1. In Settings, tap Tablet POS on the left side of screen.
2. In the Payment Processor section, tap the Processor field. The following screen displays.



3. Tap the Epicor Payment Exchange - Net field. The following screen displays.

The screenshot shows a mobile application interface for configuring payment settings. The top bar displays 'Settings' and 'Tablet POS Epicor Payment Exchange - Net'. The main content area is divided into two sections: 'MANUAL' and 'SWIPE'. The 'MANUAL' section contains three input fields: 'Gateway', 'Transaction Key', and 'Payment Page ID'. The 'SWIPE' section contains six input fields: 'Merchant ID', 'Terminal ID', 'TPP ID', 'Group ID', 'Device ID', and 'Cashier'. A red box highlights the left side of the screen, which is currently empty.

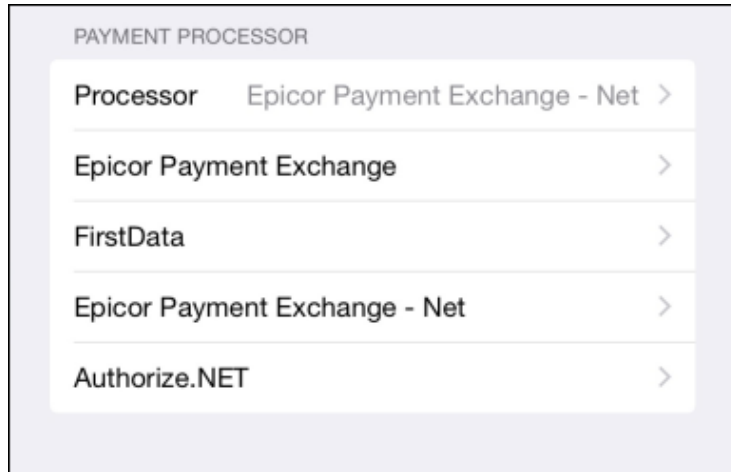
4. Manual Settings

NOTE

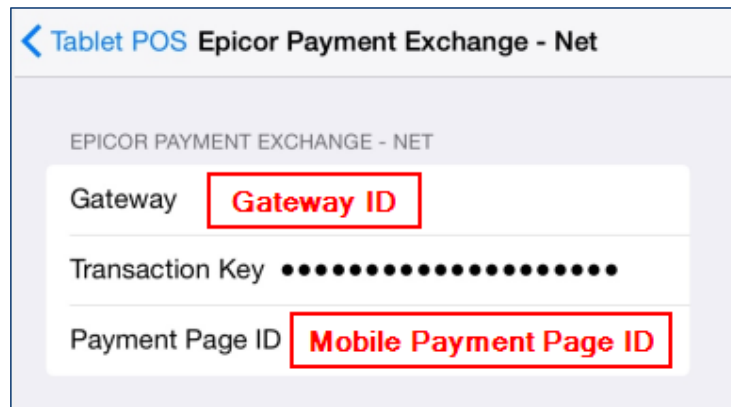
This section defines configuring the settings of your Tablet POS device for manual credit card entry. For the complete setup and overview of the payment page and credentials be sure to refer to the Payeezy Gateway Guide originally provided by the Epicor Payment Exchange team or within the support portal (<http://support.epicor.com/>) under Online Documents section:

- After establishing a Payment Page in Payeezy for your mobile devices you may begin setting up your Tablet POS for manually entered credit cards for use with Epicor Payment exchange.

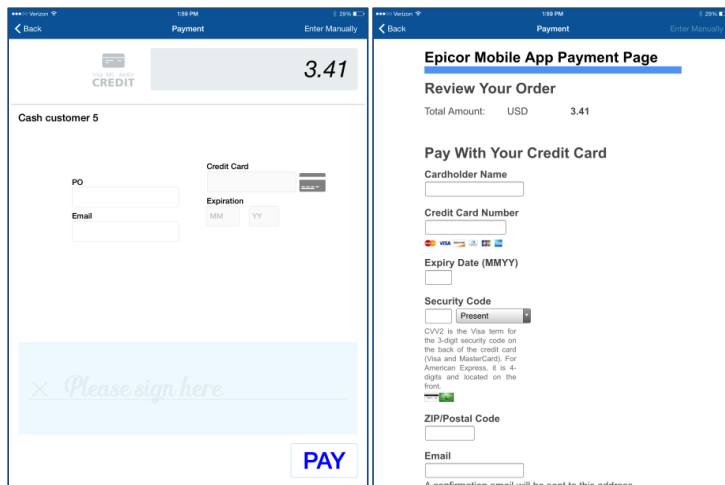
- Go to your iPad Settings and select Tablet POS. Within the Tablet POS settings you will need to set the credentials for Epicor Payment Exchange – Net.



- Enter the Gateway ID, Transaction Key and Payment Page ID for the “MANUAL” portion of Tablet POS Settings..

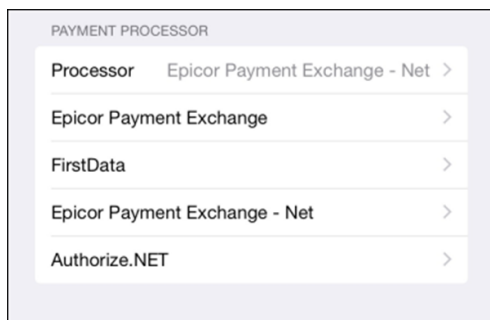


- Manual Setup is complete and you can now accept bankcard payments through manual entry within Tablet POS. To test you may post a transaction and select “Enter Manually” from the payment screen. A successful implementation will look like the following:



5. Swipe Settings

- Go to your iPad Settings and select Tablet POS. Within the Tablet POS settings you will need to set the credentials for Epicor Payment Exchange – Net then enter the swipe credentials.



SWIPE


Merchant ID	<input type="text"/>
Terminal ID	<input type="text"/>
TPP ID	<input type="text"/>
Group ID	<input type="text"/>
Device ID	<input type="text"/>
Cashier	<input type="text"/>

-
- **Swipe Credentials**
 1. MID – Merchant Specific (Provided by the Epicor Payment Exchange team)
 2. TID – Merchant Specific (Provided by the Epicor Payment Exchange team)
 3. TPP ID – Set to REP011
 4. Group ID – Set to 10001
 5. Device ID – Merchant Choice – e.g. 001 (Used to track the device when using multiple with the same merchant ID)
 6. Cashier – Merchant Choice – e.g. TABLET (Default person's name who is running the transactions)
- 6. Tap the back button at the top of the screen to return to the Tablet POS set-up screen.



Ingenico iSMP PIN Pad Pairing – Available to Epicor Payment Exchange Users Only



Power On

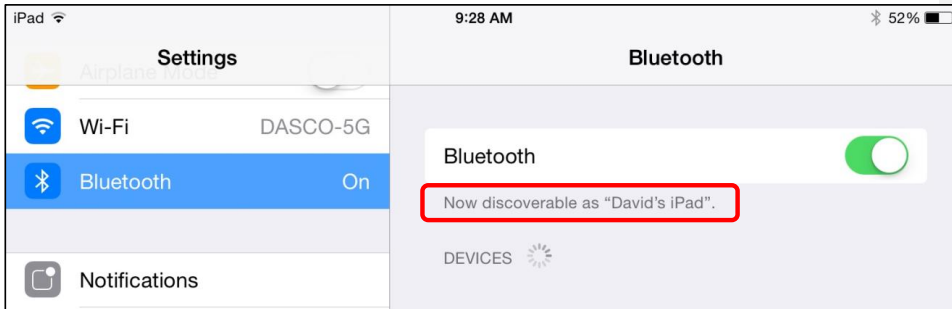
Press the green  button. The iSMP beeps quickly several times. The upper-left green light flashes and several screens display while the start-up procedure runs. Once the Epicor logo is displayed the device is ready to use.

Power Off

Press and hold the yellow  button and the  button at the same time. The iSMP beeps quickly several times and turns off.

Bluetooth Pairing

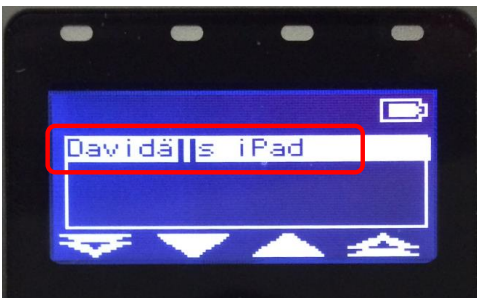
1. On your Apple device, select **Settings** → **Bluetooth**. Enable Bluetooth if necessary. It should display *Now discoverable as "devicename"*.



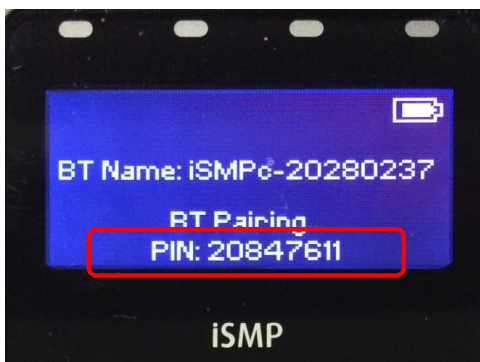
2. On the iSMP, press the **F** button 4 times quickly. The screen appears as follows:



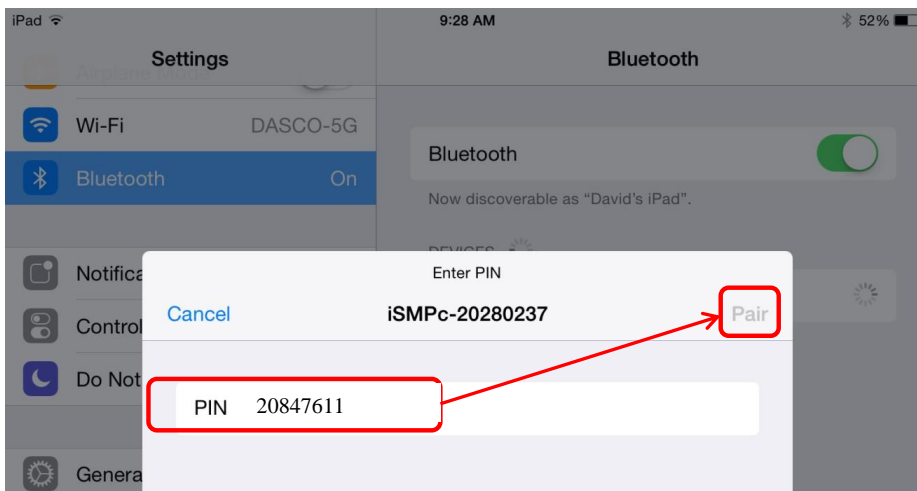
3. Press the **F1** button to choose iOS mode.
The PIN Pad may display "rebooting for iOS mode" and restart itself.
4. In a moment the iSMP displays the Apple device name. Press the green **O** button.



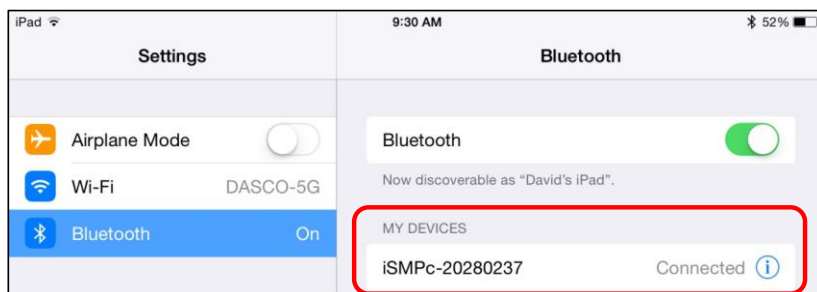
- The Apple device's Bluetooth setup screen lists the iSMP's ID and the iSMP displays the following screen:



- Enter the PIN listed at the bottom of the iSMP's screen in the Apple device's "Enter PIN" window and press the Pair button in the upper-right corner.



- The iSMP beeps and the Apple device displays the following screen:

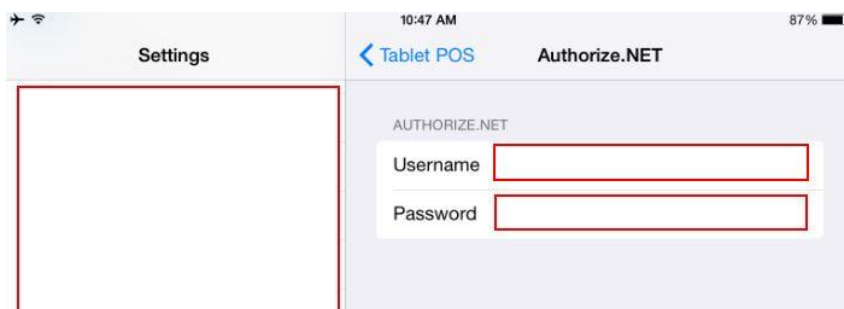


- The iSMP is now connected to your Apple device and ready to use.

Authorize.net Setup

If you choose Authorize.net to do payment processing, complete the following setup:

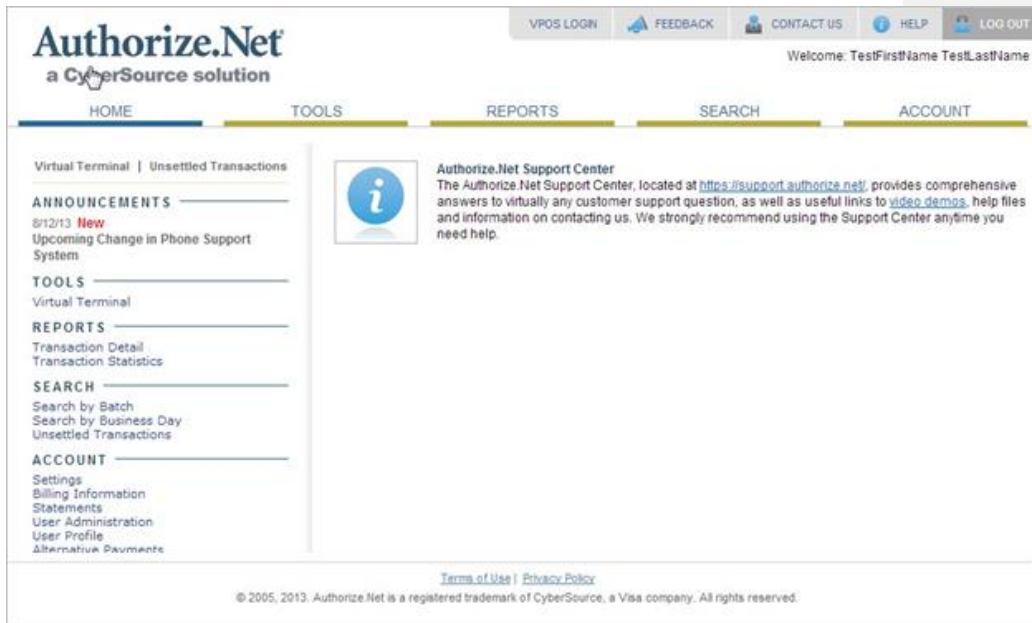
1. Go to www.authorize.net and sign up for their gateway and merchant account with the following:
 - Card Present Account—If you already have an iNET account with Authorize.net, that account is a Card Not-Present Account, so you must get another account added.
 - Specifically ask them to enable American Express processing
2. Go to the Payment Processor section, and tap Authorize.Net. The following screen displays.



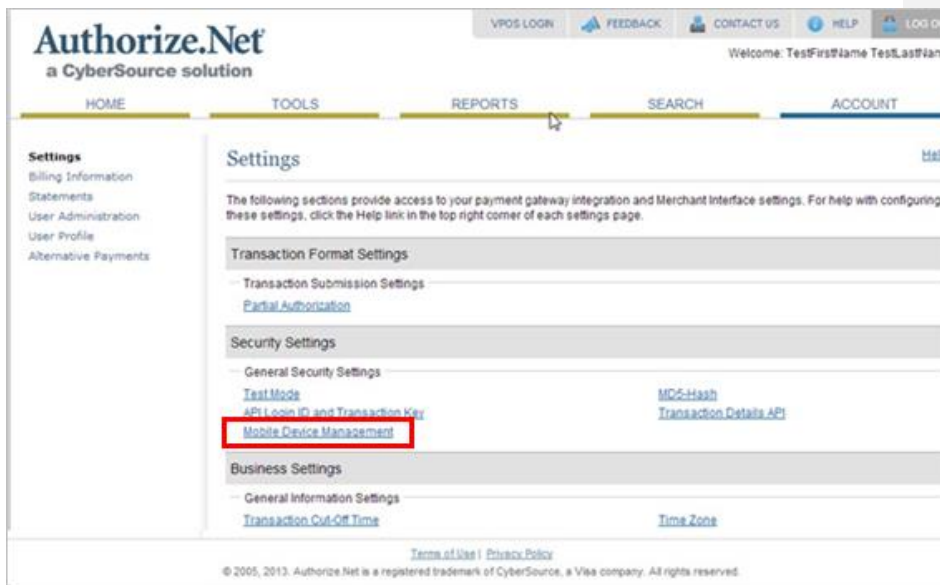
3. In the Authorize.net section, enter your user name and password to access Authorize.net for payment processing.
4. Go back to the Tablet POS application and:
 - Start a test transaction
 - Total the transaction
 - Add a valid credit card to the payment page, and tap "Pay". You will then get the following card error message.



5. Next, log into your Authorize.net merchant account access (<https://account.authorize.net/>), and click the settings tab on the left hand menu.



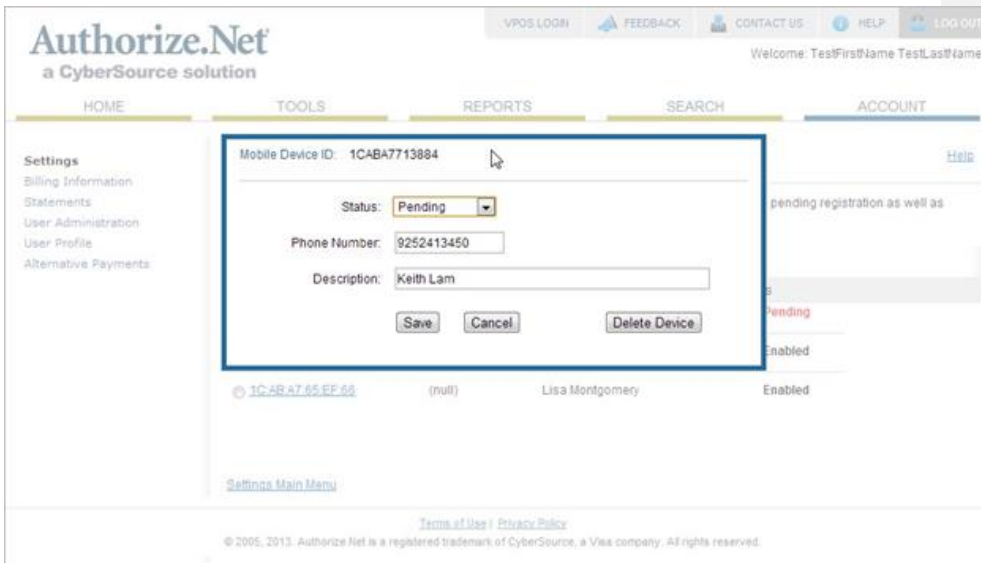
6. In settings, click Mobile Device Management.



- You will now see mobile devices that are enabled, disabled, and pending. Click the hyperlink for the device that you want to authorize. It will indicate "pending."



- Enable the device from the drop down choices in the pop-up menu.



- You can now process credit cards with Authorize.net and Tablet POS.

Setting Up Printers and Scanners for Tablet POS

It is convenient to be able to scan and print with your tablet. You can complete setup from the Settings screen. During the setup of Tablet POS, an invoice printer similar to the iNet Invoice Printer must be set up. For every transaction that is processed on Tablet POS, an invoice will print.

Setting Up the Receipt Printer in Tablet POS

1. In Settings, tap Tablet POS on left side of screen. The following screen displays.



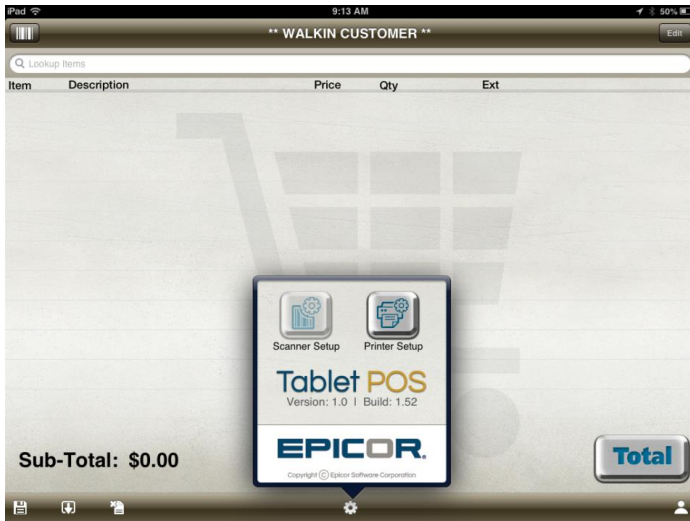
2. In the Local Receipt Printer section, tap the Type field. The following screen displays.



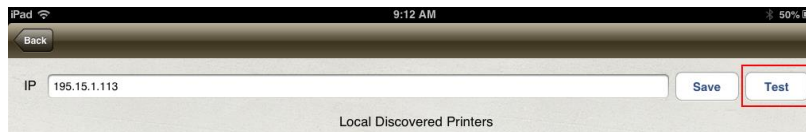
3. In the Type section, select Epson (usually P60 II), Zebra (usually QL320), or None (usually the printer that is set up for Eagle). Note: Epson and Zebra both need WiFi access and receipt paper.
4. Tap the back button at the top of the screen to return to Tablet POS.
5. In the Local Receipt Printer Section, tap the Printer IP Address field. The following screen displays.



6. In the Printer IP Address field, enter the IP address for your wireless printer.
7. Tap the back button at the top of the screen to return to Tablet POS.
8. At the bottom of the screen, tap the gear icon, then select Printer Setup.



The printer setup Local Discovered Printers screen displays.



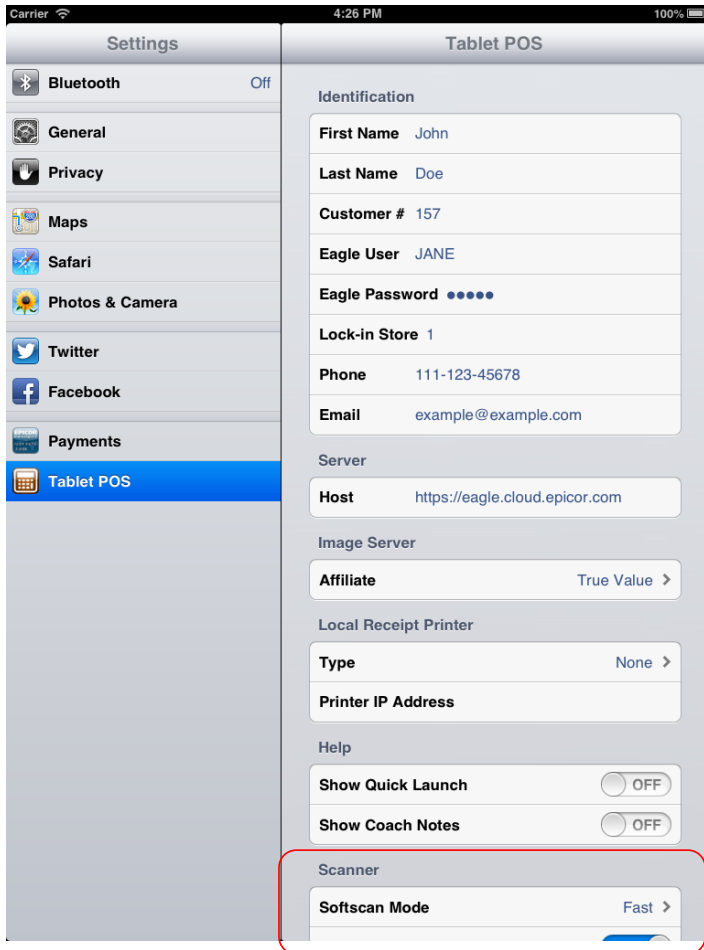
9. Select Test to test the printer. If you have a different local printer than the one listed in the IP field, you can change it and select Save.

Setting Up the Scanner in Tablet POS

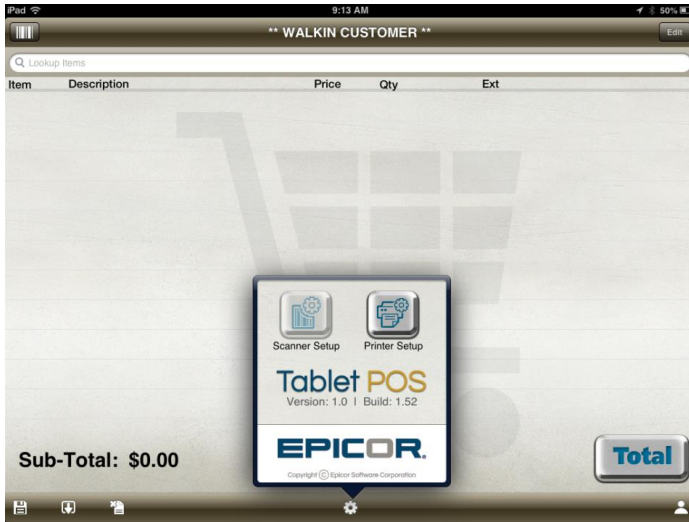
SocketScan is an optional scanner that can be used with the iPad via Bluetooth. You must first enable the iPad setting to use Bluetooth. Once the Socket Scanner is enabled, Red Laser scanning is disabled.

Note: Additional setup in iPad POS tools may be needed for device pairing.

1. In Settings, tap Tablet POS on the left side of the screen. The following screen displays.



2. In the Scanner section, set your Softscan Mode speed.
3. Set the SocketScan Enabled field to ON or set to OFF for Red Laser scanning.
4. When you use the scanner for the first time in Tablet POS, you must register the scanner, configure it, and set firmware. Go to the Tablet POS application and open it, go to the posting screen, tap the gear icon at the bottom, and choose "Scanner Setup." Follow the directions on this screen for Pairing your Socket Scanner to Tablet POS.



Signing On and Launching Tablet POS

1. Tap the Tablet POS icon to start the application.



The Tablet POS sign-on screen displays.



2. Enter your User ID and password. This information can be stored in settings for automatic login.
3. Select Login. If you set Show Quick Launch to ON in Settings, the following Quick Launch screen displays.



4. Select the appropriate task to complete. All tasks are available from any point in the system. The tasks are:

- Point of Sale
- Item Lookup
- Add Customer & Checkout
- Customer Lookup & Checkout

