

# Epicor Release 27.1 Conversion Guide

Document EL8046

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Created by: Learning Products and Education

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# 1 - Begin the Process

**\*\*\*IMPORTANT\*\*** If you are a hosted system customer, please contact your LPS to arrange to have your system upgraded first. Do not proceed with client upgrades.

This chapter is designed to give you an overview for converting your Eagle software to a new level on your Epicor Eagle™ system. Be sure to read this chapter thoroughly before running the conversion. If you have any questions about the conversion process or are missing any materials, start by creating a support case with the Advice Line. Go to <https://epicorcs.service-now.com/epiccare> and log in with your EpicCare credentials. Once logged in, you can create a case. If you do not have an, EpicCare login from, EpicCare click on Register link to complete the process. For immediate urgent matters, you can contact the Eagle Advice Line by phone at 1(800) 322-3077. Or, if you're using Eagle N Series, and have the Gold Subscription (or higher) service level, you can use the chat feature to get in touch.

## Overview of Process

Use this checklist to guide you through the conversion process. **You should complete the tasks in the order listed here.** The chapters in this guide are in the order in which you should complete the tasks.

Chapter	Task	Purpose
1	<b>Begin the Process</b>	Provides an overview of the process and additional resources for information and help.
2	<b>Important New Features</b>	Alerts you to any software features that may impact your business process as soon as the conversion is complete.  At least a few days before you convert, review the information in this guide and the online What's New information. The online information is available after you convert to your new Eagle software level. If you want to preview the What's New information prior to the conversion, it is available at <a href="http://www.epicor.com/eaglerelease/">http://www.epicor.com/eaglerelease/</a> , from the Eagle Customer Web page.
3	<b>Complete Early Preparation</b>	Allows you to prepare early for the conversion. Complete these tasks <i>any time</i> before the conversion in the following order: <ul style="list-style-type: none"><li>• Decide when to convert</li><li>• Verify you have the required materials</li><li>• Verify your current software level</li><li>• Run a backup and store it</li><li>• Sign up for eLearning online training</li></ul>
4	<b>Complete Pre-Conversion Tasks</b>	<b>Gets the system ready for the conversion. Complete these tasks <i>just before</i> the conversion in the following order:</b> <ul style="list-style-type: none"><li>• <b>Run Shutdown with Backup</b></li><li>• <b>Check End-of-Day Reports</b></li></ul>
5	<b>Convert Eagle Server</b>	Provides step-by-step procedures for installing the software on

		your Eagle server and converting to the new software level.
6	<b>Complete Post-Conversion Task</b>	When the conversion is complete, reminds you to create a backup.
7	<b>Install Eagle Client Software</b>	<p>Epicor Eagle for Windows and Epicor Eagle N Series users: Provides instructions on how to upgrade your client PCs.</p> <p><i>Both</i> the Eagle server and the client PCs must be upgraded to the new software level before you can use Eagle for Windows or Eagle N Series applications on the client PCs.</p> <p>We suggest that you install the server software first, and then install the Epicor client software on your client PCs. You must update all of your PCs with the new level of client software. A client PC must have the new level of software installed before it can connect to the Eagle server and run the Eagle client applications.</p> <p>To install the Eagle client software, complete these tasks in the following order:</p> <ul style="list-style-type: none"> <li>• Review and comply with PC requirements</li> <li>• Determine the client PC installation method (either for Stand-Alone or Network Master/Client)</li> <li>• Install Eagle client software</li> <li>• Update views</li> <li>• Test the printers</li> <li>• Start an Eagle client program</li> </ul>
8	<b>Review What's New</b>	The online What's New information is available <i>after</i> you convert to your new Eagle software level. If you want to preview the <i>What's New</i> information prior to or during the conversion, it is available at <a href="http://www.epicor.com/eaglerelease/">http://www.epicor.com/eaglerelease/</a> , from the Eagle Customer web page.
9	<b>Review Frequently Asked Questions</b>	Provides answers to most often asked questions. If you are new to the conversion process, you might find this list of FAQs helpful.
<b>Appendix A</b>	<b>Set Up to Automatically Receive Software Patches</b>	You can set up your system to automatically receive software patches as they become available.

## Additional Resources for Information and Help

A variety of resources are available to assist you before, during, and after the conversion process:

- What's New online information – The What's New document describes all the new features and enhancements that you will find in the new software release. What's New is an online help topic that you can display and print after you install the new software. Or, you can preview the What's New document before you install the software. The link to What's New is available at the Eagle Customer Portal site: <https://eaglecustomer.portal.epicor.com/index.php/documentation>.

**Note:** You should have an EpicCare account to be able to log in to the Eagle Customer Portal.

- Training On Demand – Educational content is available regarding all enhancements at <http://www.ondemand.epicor.com>.
- Epicor eLearning Solutions Center – Free training is available to all Release 27.1 customers. Please, access the training at the Eagle Customer Portal.
- Online Help – With each new software release, the online help topics are updated with information about the new features and enhancements. Access the online help as you usually do – from the Eagle Browser (or any Eagle application window), click the Help button (the yellow question mark) or press F1. You can find the information you need by using the online help system’s Index, Table of Contents, or Search feature.
  - Use the Index to locate topics quickly. Click the Index tab, type the word (or part of a word) that you are looking for, then click Display.
  - Use the Table of Contents to see the structure of the online help and to locate groups of related topics. Click the Contents tab, double-click a book to display the help topics, then click the topic you want to view.
  - Use the Search feature to locate several topics that contain the same word or phrase. Click the Search tab, type the word or phrase you are searching for, then click List Topics. Double-click the topic you want to view.
- EpicCare – You can access the EpicCare support portal 24 hours a day to post a new Case. Log on to <https://epicorcs.service-now.com/epiccare> where you can:
  - Create Cases – You will be able to create a support case.
  - Update Cases - You will be able to update a Case in three ways:
    - Close a request
    - Update a request
    - Request an escalation
- Eagle Advice Line – If you need information about how to complete tasks in an Eagle application, or would like information about how a program works, first refer to Online Help. If you need additional assistance or are missing any materials, then place a Service Request through our 24-hour EpicCare Support Portal. For urgent, immediate needs, Epicor Customer Services (the Eagle Advice Line) is available to answer your questions about using an Eagle application or the conversion process. Please have your customer number ready when calling. Call Epicor Customer Services at (800) 322-3077.

Monday – Friday

4 a.m. – 6 p.m. (Pacific Time)

Saturdays

5 a.m. – 5 p.m. (Pacific Time)

Sundays

5 a.m. – 5 p.m. (Pacific Time)

Designated Company Holidays

6 a.m. – 3 p.m. (Pacific Time)

Closed Easter Sunday, Thanksgiving Day and Christmas Day

## 2 - Important New Features from Previous Releases

Your new Eagle software level contains many new features and enhancements. Converting to this new level may affect the way you currently run your business with your Eagle system.

**Do not convert to your new Eagle software level until you review this chapter carefully.**

Multi-store users who use item lists must perform this post upgrade task for Release 27:

If your item lists were created without the 'ST=x' (where x designates the store for that list), you must do the following immediately after you upgrade:

1. Open 'Item List Maintenance' (LISTS)
2. Display each of your physical inventory item lists
3. Click <Change> to display the 'Change This List' dialog
4. Enter the Store that needs to be assigned to the list.

(From Release 26) Flag customers whose MCR information is incorrect. If a customer's information is incorrect in Customer Maintenance (MCR), you can set the Customer Status flag in the MISC tab to I (Inaccurate). The next time the customer makes a purchase in Point of Sale, the clerk will be notified to verify the customer's information. Once the information has been confirmed by the clerk, the flag will be set to A (Accurate). This enhancement is available to all customers with the exception of Ace Rewards users since Ace has an existing mechanism via EFM and a prompt controlled by Option 8874 "Check for Inaccurate Reward accounts."

(From Release 25.1) Driver's License for 'No Receipt' returns. This gives businesses with this type of return policy the ability to prompt for Driver's License on a 'no receipt' return, limit the # of 'no receipt' returns allowed in a time period, and monitor 'no receipt' returns by customer, clerk, store.

(From Release 25) Charitable Donations. As more consumers move to electronic payments, the idea of dropping change into a donation jar at the register is fading. Consumers and retailers want to make donations to charities at the point of purchase. Incorporating a "roundup" or "donate a dollar" feature into their Eagle will reduce overhead for retailers and increase charitable donations.

(From Release 24.1) New user-defined descriptions in User Codes and Vendor Codes. The 20 user codes in Inventory Maintenance and 4 user codes in Vendor Maintenance can now have their own user-defined description to tell what each code represents.



## 3 - Complete Early Preparation

Before you can convert to the new level of software, there are some pre-steps that you must complete. You can complete these tasks anytime during the days leading up to the time you plan to install the software. You should complete the tasks in the order listed. These preparation steps will help you:

- ▮ Decide when to convert
- ▮ Verify you have the required materials
- ▮ Verify your current software level
- ▮ Run a backup and store it
- Sign up for eLearning online training through <http://www.epicor.com/eaglerelease/> (see Chapter 1 “Additional Resources for Information and Help”).

### Decide When to Convert

You should run the conversion:

- ▮ After the system runs the end-of-day reports
- When the system is “quiet” (that is, not being used for any other processing) with only your console terminal active
- ▮ When offline POS is not needed. See important note below:

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#### **Important**

When installing Release 27.1, if your system is currently on an Eagle Server level BELOW level 28, you will not be able to run Epicor Eagle™ Offline POS for Windows during the conversion. If this applies to you, we recommend that you do the conversion at the close of your business day. If your system is on Eagle Server level 28 or higher, you CAN use Offline POS. If you decide to run offline POS on each POS station, it is important to verify that your offline database is current.

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Most customers choose to do the conversion either first thing in the morning or *after* backing up the system and printing end-of-day reports at the close of the business day. If you choose to do the conversion in the middle of the day, do not run shutdown for your backup.

Most server software conversions take up to an hour to complete, depending on the speed of your system. If your files are large, or you have many client PCs to update, it could take even longer. You may want to consider doing your conversion during the week, when Epicor Software Corporation™ has longer support hours to assist you with any questions or problems.

## Verify the Required Materials

Do not continue with the conversion until you have all of the materials listed below. If you do not have all of the materials, or are not sure if you have them, use your EpicCare Login 24 hours a day at <https://epicorcs.service-now.com/epiccare>. For urgent issues, contact the Eagle Advice Line at 1(800) 322-3077.

In the software upgrade package you received from Epicor, you should have the following:

- Eagle Server Software CD—this is the new software that you will be installing on the server
- (If you are running Eagle for Windows or Eagle N Series programs) Eagle Client Applications CD—this is the new software that you will be installing on the client PCs

Materials that you already have at your store:

- Current software CDs—you need these in case a problem arises and you have to restore your system to this level of software. The next section describes how to determine your current software level.
- Most recent backup media—this is important! You must have a successful backup before you start the conversion. This ensures that you have the most recent data available in case you must restore data. Be sure to keep the backup for 30 days after the conversion.

## Verify the Current Software Level

To perform the conversion, you must know what level of software you are currently on. To verify your current software level, complete the following steps:

1. From a Network Access window, at the Function prompt, type PCO and press <Enter>. Note: Epicor Eagle™ Legacy users: complete the above step from the Function prompt. The Show PCO Level screen displays with the following information:

SYSTEM SOFTWARE PCOs

Programs: 33.1111

OS: 20.0015

Linux: 20.0004

Master: 20.0004

2. Check the software level in the Programs field near the top of the screen. This number should correspond with the level listed on the CD for your current software level (not the new CD you received).
3. If the level on your current CD is lower than the level shown in the Programs field in PCO, do not install the new CD. Look for the level of software that matches the level shown in PCO, or contact the Eagle Advice Line via email or phone at 1(800) 322-3077.
4. Press <End> to exit the screen.

### Run a Backup and Store It

Be sure your end-of-day routine includes a successful backup. You must have a backup before you start the conversion. This ensures that you have the most recent data available in case you must restore data. Be sure to keep the backup media for 30 days after the conversion.

## 4 - Complete Pre-Conversion Tasks

To ensure your new Eagle software level conversion is successful, complete these pre-conversion tasks *just before* you start the conversion installation. After you complete these procedures, you can convert to your new Eagle software level. You should complete the tasks in the order listed. These preparation steps will help you:

- Run shutdown with backup
- Check End-of-Day Reports

### Run SHUTDOWN with Backup

This procedure backs up your data and prints the end-of-day reports. Prior to converting to your new Eagle software level, you *must* run a backup. This ensures that you have the most recent data available in case you have to restore the data. Be sure to keep this backup for 30 days after the conversion. If you need a spare backup CD or tape, contact Business Products at 1(800)-338-7423.

If you are converting to your new Eagle software level in the morning, you can use the backup from last night, as long as you have not entered any transactions or changed any data on your system since the backup was completed. Continue with the next chapter, “Convert Eagle Server.”

To run SHUTDOWN with backup, do the following:

1. Close any Eagle for Windows or Eagle N Series applications EXCEPT the Listener, which must remain running to print the end-of-day reports.

Note: Epicor Eagle™ Legacy users: at all your terminals, *except* the one on which you run SHUTDOWN, type QUIT and press <Enter>.

2. From a Network Access/Secure Access window, at the Function prompt, type SHUTDOWN and press <Enter>.

Note: Epicor Eagle™ Legacy users: complete the above step from the Function prompt.

3. Follow the prompts to ensure that you have the correct backup tape in the tape drive, and that all expected daily queues are loaded.
4. Press <Run> to proceed to the next screen, and answer Y to both questions in the Box.

SHUTDOWN performs a backup of your data and starts the EOD reports. Be sure to answer Y to the backup prompt.

Once the backup is complete, do the following:

5. Remove the backup media.
6. From a Network Access/Secure Access window, at the Function prompt, type MBC and press <Enter>.

Note: Epicor Eagle™ Legacy users: complete the above step from the Function prompt.

7. Check that the backup was successful.
8. Label this backup set “Data Before Conversion” and date it. Set it aside in a safe place for 30 days after the conversion.

## Check the End-of-Day (EOD) Reports

Once the backup is complete, SHUTDOWN starts your EOD reports. Do not convert to your new Eagle software level until all reports have run.

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 **Important**

Do not run point-of-sale between the time SHUTDOWN finishes and the conversion is completed.

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To check if the EOD reports ran, do the following:

1. From a Network Access/Secure Access window, at the Function prompt, type RABO and press <Enter>.

Note: Epicor Eagle™ Legacy users: complete the above step from the Function prompt. Eagle for Windows and Eagle N Series users may prefer to use the Report Queue Maintenance window, which is accessible from the System Management Menu of the Eagle Browser.

The Abort Report (RABO) Screen displays.

The reports are finished if the upper portion of the screen is blank and the message, “NO INFORMATION TO DISPLAY,” displays at the bottom of the screen. If the screen is not blank, wait for the reports to finish.

2. To check the report status, press <Display>.

Note: Eagle for Windows and Eagle N Series users using the Report Queue Maintenance window will have a blank grid when reports have finished.

## 5 - Convert Eagle Server

Once you have completed the procedures in Chapters 3 and 4, you are now ready to convert the software.

### Important Tips to a Successful Conversion

- ▮ Complete each step of the conversion process in the order presented. If you are converting to your new Eagle software level before the store opens in the morning and the system is still quiet (you have not used it for any processing since shutdown completed), you do not have to load your EOD queues and run shutdown again.
- ▮ Type slowly and carefully.
- ▮ Verify what you type before you press <Enter>.
- ▮ Do not press <Backspace> to delete an incorrect character. Instead, press <Enter> and retype the information when prompted again.
- ▮ There may be a delay as the conversion processes the information that you enter. Be sure to wait for the prompt. Do not type any information or press any keys until you are prompted.
- ▮ If you get an error message while completing the conversion, write it down and call the Eagle Advice Line at 1(800) 322-3077.

### Convert the System

Use the following procedure to convert to your new Eagle software level using the Eagle Server Software CD.

1. Place the Eagle Server CD in the CD drive.
2. At the console Login prompt, type `powerdown` and press <Enter>. The console is the terminal that plugs directly into the back of the CPU. It is within a few feet of the Eagle system CPU. If you are running applications on the console, exit to the Function prompt. At the Function prompt, type `QUIT`, and press <Enter>. You are now at the console login prompt.  
Note: If the screen asks for a password, press <Enter> and repeat step 2. Check that you are typing lowercase letters.
3. Answer `y` to the warning message: “Once started, a powerdown cannot be halted. Do you wish to start a powerdown?” Then press <Enter>.
4. Type the `y` exactly as it appears here (lowercase).

As the Eagle system completes the powerdown process, the screen displays various “stopping” and “shutting” messages.

5. In a few minutes, the system will do one of the following:

- It may display the word “powerdown” on the screen. This is perfectly normal, and rest assured that your system is NOT locked up. At this point, you must physically **power off your server** by pressing the power button.  
or
  - ▮ It may power itself off automatically.
- 6. Once the Server has been powered off, let it stay off for 60 seconds before powering it back on to avoid damaging the hardware. After 60 seconds have gone by please restart the server by pressing the power button.
- 7. Once the system restarts, you will see a series of messages and install screens. Press <Enter> when prompted.
- 8. When prompted, answer the questions about time zone and daylight savings. For example, if today is June 24, 2015, 6:30 p.m. PST, type 7 (from the list on the screen) at the time zone prompt and press <Enter>. You may have to press the ‘Num Lock’ key in order for the numbers on the keypad to work (or you can use the numbers across the top of the keyboard). Type Y if daylight savings is ever in effect in your area and press <Enter>. If not, type N and press <Enter>.
- 9. Enter your response to the message, “PRESS <ENTER> TO RETAIN CURRENT DATE AND TIME OR ‘C’ TO CHANGE.”  
If the date and time displayed on the screen are correct, press <Enter>. If they are not correct, type C and press <Enter>. Then follow the prompts on the screen.
- 10. At the Installation Menu, type 1 (Newsoft) and press <Enter>. When the warning displays about Newsoft overwriting programs, type a Y and press <Enter>. The Newsoft process begins. The screen warns you that this process may take a while.
- 11. In about 20 minutes or so, the CD will eject. Remove the CD and press <Enter>.
- 12. When the login screen displays, type newsoft (all lower case letters) and press <Enter>.
- 13. When prompted, press <Enter> to select Newsoft. Once the system reboots, you are done installing the server software.

## 6 - Complete Post-Conversion Tasks

Once the conversion is complete, there are several important tasks you should complete. Make sure to:

- Create a backup
  - If you haven't already set up your system to receive patches automatically, see the setup procedure in Appendix A.

### Create a Backup

Back up your data now that the system is converted to the new level. Use your next scheduled backup tape set. Create a backup **without** running Shutdown.

#### ! Important

If you use Secure Data Backup, you **MUST** do the following before attempting to run a manual backup:

1. From Eagle Browser, click Utilities, and select Osprey.
2. When the Osprey screen displays, type SSM at the Selection prompt, and press Enter.
3. Use your down-arrow key to highlight Secure Data Backup Service.
4. Press Run to start the Secure Data Backup Service.



To back up your data, do the following:

1. From a Network Access/Secure Access window, at the Function prompt, type **BACKUP** and press <Enter>. Note: Epicor Eagle™ Legacy users: complete the above step from the Function prompt.
2. Follow the prompts on the screen.

When backup completes, you have successfully converted your Eagle server to your new Eagle software level.



## 7 - Install Eagle Client Software

**\*\*\*IMPORTANT\*\*** If you are a hosted system customer, please contact your LPS to arrange to have your system upgraded first. Do not proceed with client upgrades.

**\*\*\*NEW\*\*\*** The Eagle Client Applications CD contains one upgrade file, setup.exe. There is no longer a netsetup.exe file. The setup.exe file will upgrade Stand-Alone stations as well as Network Master/Clients. The upgrade process has not changed: Stand-Alones and the Network Master stations install from the CD. Upgrade the Network Master stations first and when completed, the clients will obtain the upgrade file from the Network Master as in previous releases.

This chapter describes how to install/upgrade Epicor Eagle™ for Windows and Eagle N Series client programs. If you do not use Eagle for Windows or Eagle N Series, skip this chapter.

If you use Eagle for Windows or Eagle N Series, complete the following tasks in this order:

- ▢ Read the notice about Windows 8.1
- ▢ Review Minimum Requirements for Running Eagle for Windows or Eagle N Series
- ▢ Review PC Recommendations
- ▢ Determine the Installation Method
- ▢ Install the Eagle client software (either for Stand-Alone or Network Master/Client)
- ▢ Update Views (if you are upgrading from a previous version of Eagle for Windows)
- ▢ Test the Printers
- ▢ Start an Eagle for Windows or Eagle N Series program

### Review Minimum Requirements for Running Eagle Client Software

#### PC Disk Space Minimum Requirements—Eagle for Windows

- ▢ Stand-Alone Client = 1.10 GB (440 MB w/o Training Browser)
- ▢ Network Master + Client = 1.20 GB (550 MB w/o Training Browser)
- ▢ Network Client = 300 MB (uses Training Browser on Network Master)
- ▢ Network Master = 330 MB w/o Network Client or Training Browser

#### Eagle for Windows System Minimum Requirements

- ▢ Processor: Intel Dual Core 2.5GHz or higher
- ▢ Memory: 2GB but recommend 8GB
- ▢ Microsoft Windows Version 10 (32 and 64 bit versions)
- ▢ Microsoft Windows Version 8 (32 and 64 bit versions)

- Microsoft Windows Version 7 (32 and 64 bit versions)
- Microsoft Windows 2012 Server (32 and 64 bit versions)
- Microsoft Windows 2008 Server (32 and 64 bit versions)

## **Eagle N Series System Minimum Requirements**

### **PC Prerequisites**

- Windows 7, Windows 8 or Windows Server 2008 R2, 2011, or 2012
- No Windows XP or Vista
- Minimum 2GB RAM but recommend 8GB RAM for PCs running Analytics tabs
- Microsoft Windows Version 10 (32 and 64 bit versions)
- Microsoft Windows Version 8 (32 and 64 bit versions)
- Microsoft Windows Version 7 (32 and 64 bit versions)

### **Server Prerequisites**

- 4GB or greater RAM
- Internet connectivity
- Eagle OS 2.0 or 3.0

## **PC Recommendations**

If you are buying a new system to run Eagle for Windows or Eagle N Series, this system is expected to run the standard applications well for several years.

You must have Windows administrative rights to install and run Eagle applications on the PC. The following are the PC recommendations for running Eagle for Windows programs.

Eagle Third Party Client Master PC Recommended Specifications	Eagle Third Party POS PC Recommended Specifications
<ul style="list-style-type: none"> <li>• INTEL Pentium Dual Core, 3.3 GHz Processor or better <sup>(1)</sup></li> <li>• 8 GB RAM or better <sup>(2)</sup></li> <li>• Windows 10 Professional or Enterprise 32 bit or 64 bit <sup>(3)</sup></li> <li>• 80 GB SATA Hard Drive or larger</li> <li>• Network / Ethernet Card</li> <li>• 8X DVD-ROM SATA Drive or better</li> <li>• Color Monitor and Video Card</li> <li>• Keyboard</li> <li>• Mouse</li> <li>• Multiple USB Ports <sup>(4)</sup></li> <li>• Sound Card and Speakers <sup>(5)</sup></li> <li>• Serial/Parallel port(s) as needed <sup>(6)</sup></li> </ul> <p>(1) Processors can be INTEL or AMD.</p> <p>(2) Additional RAM can increase system speed, particularly for running reports and queries using Epicor Compass.</p> <p><b>(3) Windows 10 Professional or Enterprise, 32bit or 64bit are recommended and supported on Level 25.1 or higher.</b> Windows 8 is only supported on Eagle software Level 22 or higher. Windows 8.1 is only supported on Eagle software Level 22.1 or higher and Windows 7 can also be used. Windows Vista (32bit), Windows Server 2003 and 2008 (32 and 64 bit), Windows XP Pro SP3 and prior versions are no longer supported. Legacy POS devices such as PAC boards may work but will not be supported by Epicor on Windows 7 or higher.</p> <p>(4) Must have sufficient number of USB ports to support all USB peripherals.</p> <p>(5) Sound card and speakers should be on stations to take advantage of the integrated training videos and quick tips.</p> <p>(6) Sufficient serial/parallel ports need to be available for any peripherals needed.</p> <p>Epicor supplies a PC that is tested, configured, and guaranteed to work for an Eagle for Windows Client Master. Contact your Epicor Account Manager for current pricing. Specifications are subject to change.</p> <p>Third Party PCs meeting the above recommended minimum specifications listed are not necessarily</p>	<ul style="list-style-type: none"> <li>• INTEL Pentium Dual Core, 3.3 GHz Processor or better <sup>(1)</sup></li> <li>• 8 GB RAM or Better <sup>(2)</sup></li> <li>• Windows 10 Professional or Enterprise 32 bit or 64 bit <sup>(3)</sup></li> <li>• 80 GB SATA Hard Drive or larger</li> <li>• Network / Ethernet Card</li> <li>• 16X DVD-ROM or better</li> <li>• Color Monitor and Video Card</li> <li>• Keyboard</li> <li>• Mouse</li> <li>• Available PS2 port if using wedge scanner</li> <li>• Multiple USB Ports <sup>(4)</sup></li> <li>• Sound Card and Speakers <sup>(5)</sup></li> <li>• Serial/Parallel port(s) as needed <sup>(6)</sup></li> </ul> <p>(1) Processors can be INTEL or AMD.</p> <p>(2) Additional RAM can increase system speed, particularly at POS.</p> <p><b>(3) Windows 10 Professional or Enterprise, 32bit or 64bit are recommended and supported on Level 25.1 or higher.</b> Windows 8 is only supported on Eagle software Level 22 or higher. Windows 8.1 is only supported on Eagle software Level 22.1 or higher and Windows 7 can also be used. Windows Vista (32bit), Windows Server 2003 and 2008 (32 and 64 bit), Windows XP Pro SP3 and prior versions are no longer supported. Legacy POS devices such as PAC boards may work but will not be supported by Epicor on Windows 7 or higher.</p> <p>(4) Must have sufficient number of USB ports to support all USB peripherals (i.e., Cash Drawer, Cash Receipt Printer, Scanner, Debit pad, Keyboard, Mouse, etc.).</p> <p>(5) Sound card and speakers should be on all POS stations or stations with bar code scanning in order to hear a clear audible beep tone that indicates a good or bad scan. It is also recommended to take advantage of the integrated training videos and quick tips.</p> <p>(6) Sufficient serial/parallel ports need to be available for any peripherals needed (i.e., Customer Display pole, CRP, Parallel invoice printers, etc.).</p> <p>Epicor supplies a PC that is tested, configured, and guaranteed to work with our Eagle for Windows</p>

<p>guaranteed to work properly with the Epicor Eagle for Windows Programs. Additional fees and services may be required to determine a PC's ability to connect to the Eagle server. Please ask your Epicor Direct Account Manager for details at 1(800) 538-8597.</p> <p>Processor and memory upgrades beyond recommended specifications may provide significant increases in performance.</p>	<p>applications. Contact your Epicor Account Manager for current pricing. Specifications are subject to change.</p> <p>Third Party PCs meeting the above recommended minimum specifications listed are not necessarily guaranteed to work properly with the Epicor Eagle for Windows Programs. Additional fees and services may be required to determine a PC's ability to connect to the Eagle server. Please ask your Epicor Direct Account Manager for details at 1(800) 538-8597.</p> <p>Processor and memory upgrades beyond recommended specifications may provide significant increases in performance.</p>
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## Determine the Installation Method

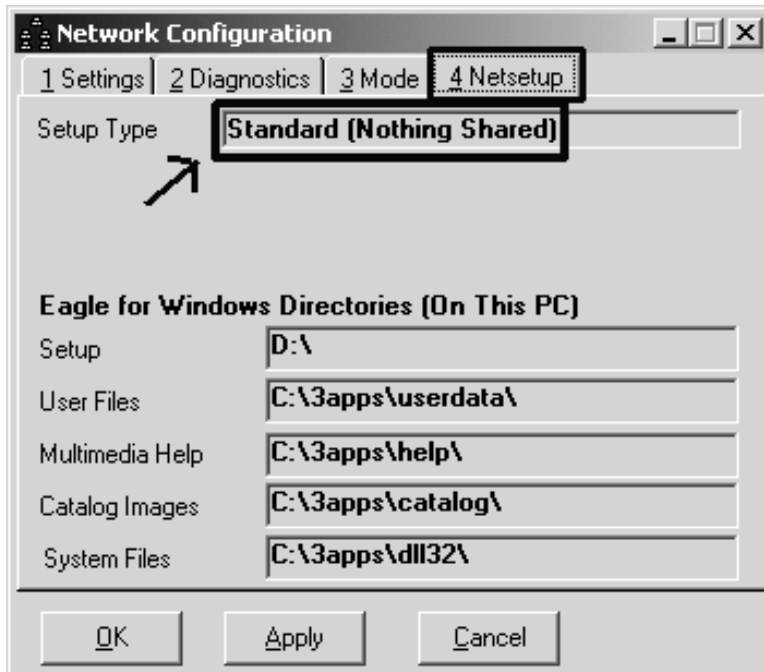
There are two possible methods for installing Eagle client software on your PC(s):

- Stand-Alone method—installing each PC as a stand-alone station
- Network Master/Client method—installing one PC as the Network Master and other PCs as Network Clients

**Note:** Your business could be using both methods; that is, you may have a Network Master and Client(s), but still have other PCs that are Stand-Alone. Therefore, it may be necessary to check each PC on your network.

If you are not sure which method you are using, use the following procedure to confirm the method:

1. Click Start, and then point to Programs, Eagle, Utilities, Network Configuration.
2. In the Network Configuration box, click the Netsetup tab.



3. Look at the entry in the Setup Type field. If it displays “STANDARD (NOTHING SHARED)” as in the example above, use the Stand-Alone method when installing Eagle client software. If it says “NETWORK MASTER” OR “CLIENT,” use the Network Master/Client method.

## Install for the Stand-Alone Method

Complete the following procedure at each PC that runs Eagle client software with the Stand-Alone method.

1. Close all programs and disable virus protection software to prevent installation conflicts. As you close the Eagle Listener program, it may ask for a password. Enter the password. If you do not know the password, try entering OMEGA.
2. Insert the Epicor Eagle Client Applications CD into the CD drive.
3. If the contents of the CD drive do not automatically display, double-click the My Computer icon, then double-click the CD drive icon.
4. Double-click the setup.exe icon. The icon looks like a house.  
Note: If your Windows system hides extensions for known file types, the icon may display as “setup” and not “setup.exe”. If it does, you can click Tools, select Folder Options, click the View tab and uncheck the box for “Hide extensions for known file types.”
5. Follow the instructions on the screen.

**Important:** on PCs with an Offline POS database, the last part of the upgrade updates the offline views, and also executes any necessary file advances for the Offline database. This process may take some time. It is critical that you **do not abort this process**.

6. When the installation is complete, remove the CD from the drive.

7. As soon as the PC has rebooted, continue to the section entitled Update Views to use that PC to update views on the server. You only have to update views once. Then return to this section and repeat steps 1-6 (above) at each remaining Client PC that runs Eagle client software with the Stand-Alone method.

## Install for the Network Master/Client Method

This procedure requires that you follow two sets of instructions, one for installing the Network Master, and another for installing the Network Client(s).

### *Install for the Network Master*

Complete the following procedure at the Network **Master PC**.

1. At the Network Master PC, close all programs and disable virus protection software to prevent installation conflicts. As you close the Eagle Listener program, it may ask for a password. Enter the password. If you do not know the password, try entering OMEGA.
2. Insert the Epicor Eagle Client Applications CD into the CD drive.
3. If the contents of the CD drive do not automatically display, double-click the My Computer icon on your desktop, then double-click the CD drive icon.
4. Double-click the setup.exe icon. The icon looks like a house.  
Note: If your Windows system hides extensions for known file types, the icon may display as “setup” and not “setup.exe”. If it does, you can click Tools, select Folder Options, click the View tab and uncheck the box for “Hide extensions for known file types.”
5. Follow the prompts on the screen.
6. When the installation is complete, click Finish. The Network Installation screen displays.
7. If you accepted the default earlier in the installation, the PC will automatically reboot after installation.
8. After installation, a message displays letting you know that installation is complete. Then, click Finish.

*Note:* At the bottom of the message screen is a checkbox “Install/Upgrade Eagle Client on this Station Now.” If you leave the box checked, it will take you through steps to install the client software and then you can use the applications. If you uncheck the box, the PC will only be used as the Network Master and cannot be used for other applications.

### *Install for the Network Client(s)*

Complete the following procedure at each Network **Client PC**.

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 **Important**

You must first perform the Network Master installation on the Network Master PC before performing a Network Client installation.

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1. At a Network Client PC, close all programs and disable virus protection software to prevent installation conflicts. As you close the Eagle Listener program, it may ask for a password. Enter the password. If you do not know the password, try entering OMEGA.
2. Open the Eagle Browser on the Client PC. A message displays, telling you to upgrade your Eagle client programs.
3. Click Yes, and then follow the prompts to update the PC.
4. Important: on PCs with an Offline POS database, the last part of the upgrade updates the offline views, and also executes any necessary file advances for the Offline database. This process may take some time. It is critical that you do not abort this process.
5. When the installation is complete, remove the CD from the drive.
6. As soon as soon the PC has rebooted, continue to the next section to use that PC to update views on the server. You only have to update views once. Then return to this section and repeat steps 1-3 (above) at each remaining Client PC to update Eagle client software.

## Eagle N Series Users: Install Latest Compass Software

Eagle N Series includes a number of embedded Compass features. To use these features, you must install the compatible version of Compass software. To obtain the software, go to <http://www.activant.com/eagle-customer-support/compass/> to download. You should also download the Compass Installation Guide located at the following web address: [http://www.activant.com/eagle-customer-support/login.cfm?CFID=376494&CFTOKEN=bc9c7a40f8fda977-818B172E-B19A-ADC2-77ED2AC8FAA8926C&jsessionid=843044c7dc8ee1a5687b3e3d18b5221471e1&\\_ga=1.206016407.560640308.1426599132](http://www.activant.com/eagle-customer-support/login.cfm?CFID=376494&CFTOKEN=bc9c7a40f8fda977-818B172E-B19A-ADC2-77ED2AC8FAA8926C&jsessionid=843044c7dc8ee1a5687b3e3d18b5221471e1&_ga=1.206016407.560640308.1426599132). Once you have downloaded the software and the installation guide, install the Compass software.

## Update Views

Once the first Client PC has been updated and has finished rebooting, you must use that PC to update views on the server. Until you do this, other PCs will be unable to connect to the server. If you are upgrading at night, be sure to update views before you leave for the night.

A view is a saved setting, which displays selected information in a grid. This process does not modify views you have previously customized and saved.

Do the following to update views:

1. Open the Eagle Browser.
2. Click Yes when asked if you want to update views.
3. Click Update Views.
4. After a few minutes, when the status bar turns green to indicate that the views are done updating, click Close.

## Test the Printers

Testing your printers is optional. Once you have finished installing Eagle client software, follow the steps below to check the printers.

Test your printers by sending a short report, such as RTM, to your report printers, and invoice test alignments to your invoice printers.

If a report does not print, try the following:

1. Make sure the printer is turned on and is online.
2. From a Network Access/Secure Access window, in Function MPS, check the Form Used in Printer field. If anything is in the field, press <Clear Field> while the cursor is at the field, and then press <Change>.
3. Check Function RABO for any reports that are waiting to print. From a Network Access window, at the Function prompt, type RABO and press <Enter>.

Note: Epicor Eagle™ Legacy users: complete the above step from the Function prompt. Eagle for Windows and Eagle N Series users may prefer to use the Report Queue Maintenance window, which is accessible from the System Management Menu of the Eagle Browser.

The Abort Report (RABO) Screen displays. If any reports are in the queue, follow the instructions on the screen to delete the reports.

4. If you still have problems after trying these steps, call the Eagle Advice Line at 1(800) 322-3077.

## Start an Eagle for Windows or Eagle N Series Program

The following are three different methods to start an Eagle for Windows or Eagle N Series program. Epicor recommends you use the first method because it offers the most in-depth view of all the available programs.

1. From your desktop, double-click the Eagle Browser icon. From the menu that displays, click the program you want to start.
2. From your desktop, double click the icon that corresponds to the program you want to start (such as Point-of-Sale).
3. Click the Start button and then point to Programs. Point to the Eagle folder and then click the program you want to start (such as Point-of-Sale).



## 8 - Review What's New

Now that you have installed new software, you can review What's New for this release at any time that is convenient for you. To access the What's New information:

4. Select Help from the Eagle Browser. The What's New displays automatically in the right pane. If you are already viewing another topic in online help, you can find the What's New by opening the "What's New?" book in the Contents tab.
5. The What's New information is also available online at [www.epicor.com](http://www.epicor.com). It may be a good idea to review the information on the website while waiting for the conversion to complete.

To access the information from the website:

- From the Customer Login list, select Eagle.
- Log in using your iSupport login. If you don't have an iSupport login yet, use the link to sign up.
- From the Epicor Eagle Customer page, select "Find out what's new in Release 27.1" under "Release 27.1 is Here!"

## 9 - REVIEW FREQUENTLY ASKED QUESTIONS

If you are new to the software conversion process, you might find it helpful to review the questions and answers in this section before you complete the conversion. If you need additional information or have questions, call the Eagle Advice Line at 1(800) 322-3077.

### **Will my current business procedures change after I convert?**

Possibly. Converting to your new Eagle software level may affect the way you currently run your business with your Eagle system. Before you convert to your new Eagle software level, review the “Important New Features” section of this guide. You may need to complete some important steps before you begin the conversion.

### **How do I receive my What’s New information? (For Legacy Users Only)**

The *What’s New* information for your new Eagle software level is online. After you convert to your new Eagle software level, type HELP at the Function prompt to view the *What’s New* online information. If you use Eagle for Windows or Eagle N Series, the *What’s New* information is available in online help. See the book “What’s New?” in the Contents tab, and then see the book that corresponds to the new level you have just installed.

You can also access the *What’s New* information at [www.epicor.com](http://www.epicor.com).

### **Can I use the backups, used immediately before and after the conversion, for regular backups?**

No. You should save the pre-conversion backups for 30 days. However, you do not need to save the post-conversion backups.

### **I’m converting to the new Eagle software level before I open in the morning. Do I have to run another backup prior to the conversion?**

No, as long as the system is still quiet (you have not used it for any processing since shutdown completed) and you checked Function MBC (from a Network Access window) to confirm that the backup was successful.

Run a backup (*not* Shutdown) immediately following a successful conversion so that you have a backup of your data on your new Eagle software level. Keep in mind that Automated End-of-Day will not run Shutdown more than once a day; therefore, your system will not automatically run Shutdown tonight if you manually run it earlier in the day. Automated End-of-Day, however, will return to normal the following day.

You may run another manual backup in the evening and not affect tomorrow’s Automated End-of-Day. To manually perform a backup, type BACKUP at the Function prompt (from a Network Access window) and press <Enter>. Follow the prompts on the screen. Only perform a backup when the system is quiet and has no other activity, such as POS, occurring.

**❖ Do I keep the new Eagle software level CDs?**

Yes. This is your copy of the new software. Store the CDs in a safe place *at your store*. Make sure all key personnel who operate the system know where they are kept. They may be needed in the future should software need to be reinstalled on your system. The CDs are important to the ongoing support of your Eagle system. Epicor Software Corporation™ recommends you do not take them home.

**❖ I have some old software tapes, CDs, and floppy disks. What should I do with them?**

Keep them separate from your new software. This prevents someone from reinstalling old software on your system.

**❖ If I start the conversion and then leave for the evening, will the conversion finish on its own?**

No! There are several steps during the conversion that require you to type or confirm information for the conversion to continue. Once the conversion is complete, it is also necessary to make a backup of your system. You should not leave the conversion running unattended.

**❖ I have Automated End-of-Day (Auto EOD or Autopilot) and will be manually running Shutdown with backup early, just after I close my store to run the conversion. However, my Automated End-of-Day is scheduled to run later in the evening. What should I do?**

You do not need to do anything. If you run Shutdown with backup more than once on the same day, the system will only process the automated queues and run backup once. In addition, Automated End-of-Day cannot occur during the conversion process. The Automated End-of-Day will then resume normal operation the following day.

**❖ Can I run a few transactions at POS after Shutdown and the EOD reports are done, but before I start the conversion?**

No! Do not start POS or process any transactions at point-of-sale after Shutdown/EOD completes. After the conversion is done, then POS will be available again. If you are converting from server Level 28 or higher, you can use offline POS.

# Appendix A - Set Up to Automatically Receive Software Patches

You can set up your system to automatically receive software patches as they become available. You only need to complete the following procedure **one time**. Once the set up is complete, you will automatically receive software patches as soon as they are released.

1. From the Eagle Browser, type **SEQ** in the Launch bar and press <Enter>.

Note: Legacy users type SEQ from the Function prompt and press <Enter>.

2. Check if a queue called TRIT or TRIDMT is listed. If there are more than 15 report queues showing on the screen, use the down arrow key to view the rest. TRIT or TRIDMT is often near the bottom of the list. If it is not listed at all, skip to step 5. If you find TRIT or TRIDMT in the list, continue with step 3.

3. Look at the setting in the “Enabled” column.

- If the flag is set to N, for TRIT or TRIDMT, click the N. Type a Y over the N and click Change. Note: Legacy users: press <Run> and then press <Tab> to place the cursor in the enabled column. Type Y and press <Enter>. Press <End>. The message “SAVE CHANGES (Y/N)?:Y” displays. Type Y and press <Enter>.

The system is now set up to automatically receive software patches. Next, you will check MTC in step 4.

- If the flag is Y for either TRIT or TRIDMT, the system is already set up to automatically receive software patches. Next, you will check MTC in step 4.

4. Verify that your customer number is set up in MTC. From the Eagle Browser, type **MTC** and press <Enter>.

Note: Legacy Users type MTC from the Function prompt and press Enter.

Type TRIDMT, and press Enter (Legacy users press Display). The TRIDMT control stream displays. Check that line #5 has your 6-digit Epicor customer number following the word “SIGNON.” If the customer number is not there, type over what is there (for example it may say "eagle") with your customer number and press <Change>.

5. If report queue TRIT or TRIDMT is not found in SEQ, use SETMD to build the queue. In Network Access, at the Function prompt, type SETMD and press <Enter>.

Note: Eagle for Windows users use Network Access.

A screen similar to the one pictured below displays.



6. Fill in the fields as follows:
  - Schedule Type – set this field to T Check for Software Updates
  - Runaic: Y
  - Xmission Type – don't change this field, leave the default entry N for Network
  - Time – set this field to 11:00 AM
  - Type of Phone – don't change this field, leave the default entry T for Touch Tone
  - Day of Week – set the Every Day field to Y
7. Click Add to save your work and create the queue.
8. Return to SEQ to verify that the TRIT queue now exists.

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## 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](http://www.epicor.com).



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