

# CounterPoint V7 Features



CounterPoint V7

## V7.5.18 (June 2010)

### System

#### ▼ Windows 7 (32-bit only)

Microsoft Windows 7 is a supported operating system for use with CounterPoint V7.5.18.

**NOTE:** CounterPoint can be used in a 32-bit Windows 7 environment only; 64-bit environments are not supported.

#### ▼ PCI DSS-compliant passwords required

In previous versions, the use of passwords was optional, allowing merchants to decide whether to require users to enter passwords to log in to CounterPoint.

In this version, the use of PCI DSS-compliant passwords is no longer optional. All users must log in to CounterPoint with a unique password that meets the minimum PCI DSS requirements for password length and complexity (i.e., passwords must include a combination of letters and numbers).

Other password settings—including the number of days passwords are valid, the number of unique passwords each user must create before re-using a particular password, and the number of unsuccessful login attempts allowed before a user is locked out of CounterPoint—must also meet minimum PCI DSS requirements.

**NOTE:** If you are updating to V7.5.18 and you already require passwords that meet the minimum PCI DSS requirements, no further action is necessary. If you are updating to V7.5.18 and you do not require passwords or your password settings do not meet minimum PCI DSS requirements, you will need to take additional steps after updating to V7.5.18.

#### ▼ Automatic tracking of login attempts

Previously, if you were using passwords, you could configure CounterPoint to record login attempts for each user.

In this version, to ensure compliance with PCI DSS requirements, tracking login attempts is no longer optional. All login attempts are automatically recorded in the **SECURITY.LOG** file in the top-level CounterPoint directory (e.g., **C:\SYN**).

#### ▼ Disabling the transmission of encrypted credit card numbers

In CounterPoint V7.5.17, Multi-Site transmission files did not automatically include credit card numbers. However, if your Satellites communicate with your Hub via VPN, you could choose to transmit encrypted card numbers by selecting **Yes** from

the **Xmit card info ?** field in **Setup > Multi-Site > Control**.

In this version, to further protect sensitive cardholder information, you no longer have the option of transmitting encrypted card number in Multi-Site transmission files under any circumstances. The **Xmit card info ?** field has been removed from **Setup > Multi-Site > Control**.

#### ▼ **Viewing full card numbers in ticket history no longer allowed**

In previous versions, authorized users could view full, unencrypted credit card numbers in ticket history. Each time a user viewed an unencrypted card number in ticket history, the activity was logged to the **SECURITY.LOG** file, providing an audit trail.

In this version, to further protect sensitive cardholder information, CounterPoint no longer allows any user to view full, unencrypted credit card numbers in ticket history. In addition, the **View credit card numbers ?** setting that authorized a user to view unencrypted card numbers has been removed from **Setup > System > Users**.

#### ▼ **PCI DSS-compliant activity logging**

To satisfy PCI DSS requirements, CounterPoint now automatically logs the following activity in the **SECURITY.LOG** file in the top-level CounterPoint directory:

- - Access to sensitive cardholder data outside of an active transaction
- - Changes to user records (e.g., creation, deletion, security authorization changes, password reset, account lock and/or disable)
- - Changes to **Setup > Draft capture** settings
- - Creation or deletion of store records

#### ▼ **Renumber users utility**

CounterPoint now includes a **Renumber users** utility, which allows you to change the **User ID** values for a group of users by specifying the **Old user ID** and **New user ID** for each user record you want to update. This utility also updates the **User ID** values in all associated documents and historical transactions.

## **Accounting**

#### ▼ **QuickBooks 2010**

This version of CounterPoint includes a pre-defined export accounting interface for QuickBooks 2010. Interfaces for earlier versions of QuickBooks are still supported.

#### ▼ **MAS90 v4.3**

This version includes a direct accounting interface for MAS90 v4.3. Direct interfaces

for earlier versions of MAS90 are still supported.

▼ **Sage BusinessWorks 2010**

This version includes a direct accounting interface for Sage BusinessWorks 2010. Direct interfaces for earlier versions of BusinessWorks are still supported.

▼ **Microsoft Dynamics SL v7.0**

This version includes a pre-defined export interface for Microsoft Dynamics SL (formerly Solomon IV) v7.0. Interfaces for earlier versions are still supported.

▼ **Peachtree 2010**

This version includes a pre-defined export interface for Peachtree 2010. Interfaces for earlier versions are still supported.

▼ **Sage Accpac 5.6**

This version includes a pre-defined export interface for Sage Accpac 5.6. Interfaces for earlier versions are still supported.

## Point of Sale

▼ **Sending receipts via e-mail (Windows only)**

In this version of CounterPoint, when you complete a ticket in **Ticket Entry**, you now have the option of sending the receipt to the customer via e-mail.

To send a receipt via e-mail, simply select the new **F4=E-mail** option and enter the customer's e-mail address.

**NOTE:** If the customer's e-mail address is already on file, CounterPoint will use that address by default.

▼ **Adding a customer e-mail address "on the fly"**

In this version, when you select a customer in **Ticket Entry**, you can now add an e-mail address to the customer record or edit the customer's existing e-mail address "on the fly." This feature allows you to easily capture a customer's e-mail address when you are entering a ticket.

▼ **Card numbers on settlement reports**

In previous versions, CounterPoint allowed you to include full credit card numbers on settlement reports, including the SETTLEMENT EDIT LIST and the SETTLEMENT JOURNAL.

In this version, to ensure compliance with PCI DSS requirements, CounterPoint no longer allows the inclusion of full card numbers on settlement reports. Card numbers that appear on settlement reports are always masked.

As a result, the **Settlement Journal card number method** field has been removed from **Setup > Point of Sale > Control**.

## Inventory

### ▼ Price test utility

This version of CounterPoint includes the **Price test** utility, which provides a simple way to test pricing and loyalty point calculations for your items.

The **Price test** utility calculates what the price and loyalty points earned would be for an item entered on a ticket, based on the item number, customer number, location, quantity, unit, and effective date you specify. The **Price test** utility also indicates what type of price would be applied to the item (e.g., sale, contract, location-specific, and so forth).

## Customers

### ▼ Group customer change utility

This version of CounterPoint includes the **Group customer changes** utility, which allows you to update values in multiple customer records simultaneously. This feature allows you to easily make mass changes to customer information, without requiring you to modify numerous customer records individually.

For example, you can use the **Group customer changes** utility to change the **Tax code** for all customers in a particular **State** or to reassign all customers in a specific **Zip code** to a different **Zip code**. You can also copy values from one customer record to a group of customer records.

**NOTE:** This feature was released in a V7.5.17 Service Pack.

## Purchasing

### ▼ Purchasing Advice replenishment adjustments for QoH/Max qty

Previously, when you generated purchasing advice using the **Replenishment** calculation method, CounterPoint simply suggested ordering the quantity that had been sold during the specified period for each item you included on the PURCHASING ADVICE report.

In this version, when you select the **Replenishment** option from the **Calculation**

**method** field, you can now choose to consider the current quantity on hand and/or the defined maximum quantity (or model stock, for gridded items) for each item and adjust the suggested quantity accordingly.

This feature allows you to generate more accurate purchasing advice and helps to ensure that you do not order more of an item than you actually need to replenish your stock to appropriate levels.

#### ▼ **Sending purchase orders to vendors via e-mail (Windows only)**

In this version, when you print a purchase order, you now have the option of sending the PO to a vendor via e-mail, using the e-mail address that is on file for the vendor or an e-mail address that you specify.

**NOTE:** This feature will be delivered in a V7.5.18 Service Pack.

#### ▼ **Printing original receivers from Received PO History**

In **Purchasing > Batch printing**, you can now select a single receiver or a range of receivers from **Received PO History** and reproduce the original receiver(s).

**NOTE:** Reprinted receivers that were generated from allocated, merged purchase requests will not include allocation information. Further, grid information for gridded items cannot be reproduced on receivers that are printed from history. Instead, each color/size combination will appear on a reprinted receiver as if it had originally been entered on a separate line.

## **Sales History**

#### ▼ **Viewing full card numbers in ticket history no longer allowed**

In previous versions, authorized users could view full, unencrypted credit card numbers in ticket history. Each time a user viewed an unencrypted card number in ticket history, the activity was logged to the **SECURITY.LOG** file, providing an audit trail.

In this version, to further protect sensitive cardholder information, CounterPoint no longer allows any user to view full, unencrypted credit card numbers in ticket history. In addition, the **View credit card numbers ?** setting that authorized a user to view unencrypted card numbers has been removed from **Setup > System > Users**.

## **Credit Cards**

#### ▼ **Support for partial authorizations and full reversals**

To better support prepaid credit and debit cards, CounterPoint can now obtain an authorization for an amount that is less than the amount due for a ticket or order via CPGateway or CPDialup.

For example, if the **Total** for a ticket is \$30.00 and the customer presents a prepaid credit card with a balance of \$25.00, CounterPoint will obtain an authorization for \$25.00, and then prompt the user to tender an additional payment for the remaining amount due.

In addition, CounterPoint now also supports full reversals of credit card authorizations, allowing authorized credit and debit card payments to be deleted from a ticket or order before the document is complete.

Partial authorizations are supported for First Data North, TSYS, and AmEx Direct transactions. Full reversals are supported for use with First Data North and TSYS.

**NOTE:** This feature was released in a V7.5.17 Service Pack.

#### ▼ **Partial authorizations and full reversals for RPS/RBS Lynk**

In this version, partial authorizations and full reversals are now supported for use with Radiant Payment Services and RBS Lynk.

**NOTE:** Paymentech and First Data South do not currently support partial authorizations and full reversals.

## **Multi-Site**

#### ▼ **Disabling the transmission of encrypted credit card numbers**

In CounterPoint V7.5.17, Multi-Site transmission files did not automatically include credit card numbers. However, if your Satellites communicate with your Hub via VPN, you could choose to transmit encrypted card numbers by selecting **Yes** from the **Xmit card info ?** field in **Setup > Multi-Site > Control**.

In this version, to further protect sensitive cardholder information, you no longer have the option of transmitting encrypted card number in Multi-Site transmission files under any circumstances. The **Xmit card info ?** field has been removed from **Setup > Multi-Site > Control**.