



bLoyal

NCR Counterpoint POS Connector Installation Guide

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Helping You Build Loyal Customers™



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1. Software Requirements

The following are software requirements that allow for full functionality of the bLoyal integration with NCR Counterpoint:

- SQL Server 2008 R2.
- .NET Framework 4.7.2 or greater

2. Prerequisites

1. Log in to Counterpoint with Admin-level credentials.
2. Create a new item called **Price-1** as a **non-inventory item** set to **\$0** price. This will be used as the *0 Quantity Product Code*, a placeholder used to launch some of the bLoyal POS Snippets without affecting your transactions. Our stored procedures installed with our connectors will handle removing this placeholder product from your transactions automatically.
3. As detailed in Section 4, it will be necessary to create some new button pages which will act as batch actions for each new bLoyal button.
4. Ensure all cashiers have the **Hold and recall** permission enabled. This Counterpoint function is critical for the bLoyal integration's full operability.
5. The bLoyal connectors for Counterpoint will need to be granted local read/write access to the following directories (and their subdirectories):
 - **C:\ProgramData\bLoyal**
 - **C:\Program Files (x86)\bLoyal**

3. Install bLoyal POS Connector for Counterpoint

← → ↻ 🏠 support.bloyal.com/Integrations/CounterPoint/POSConnector/

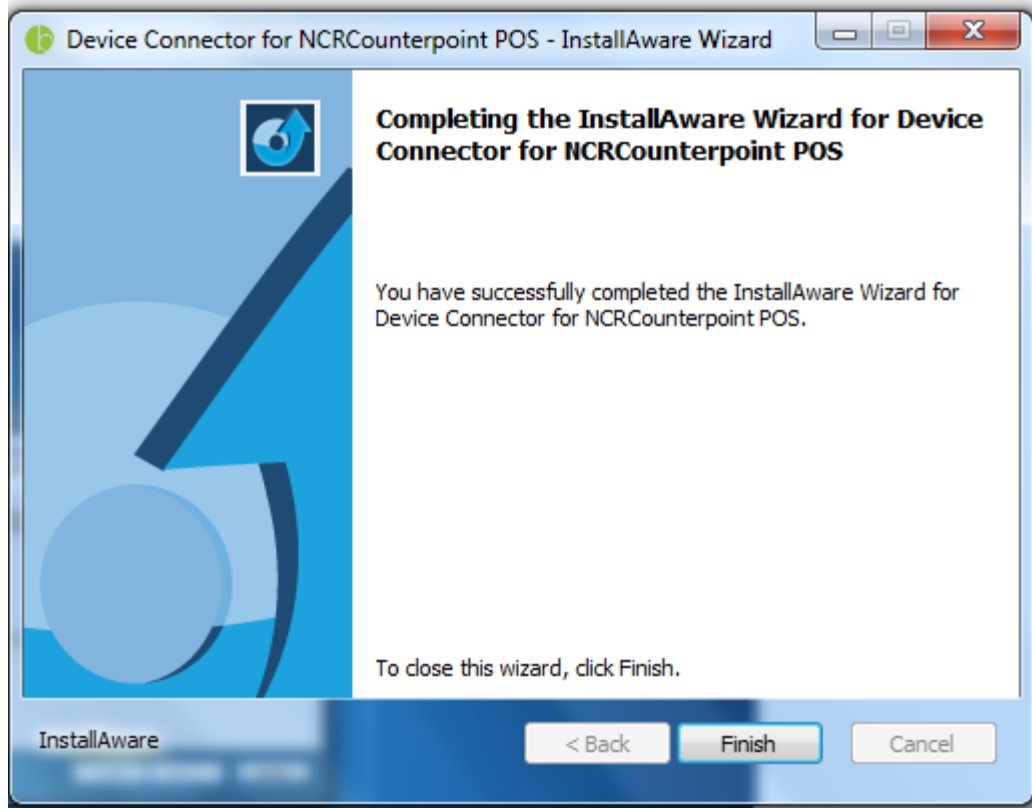
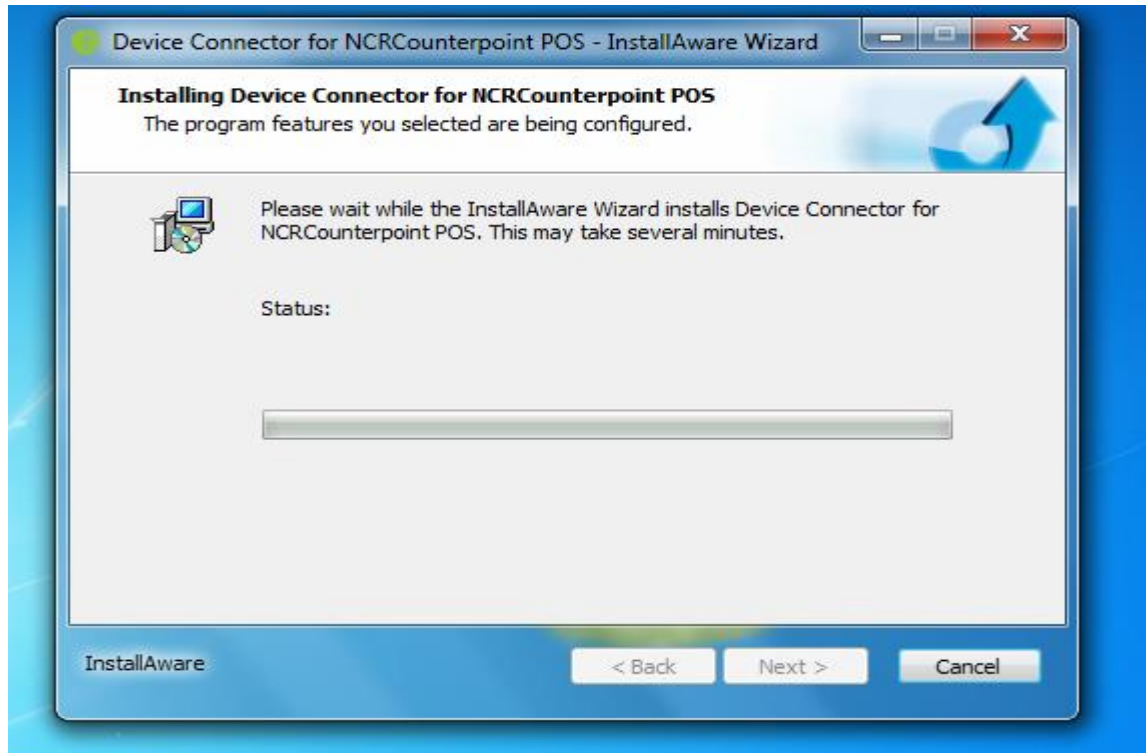
📁 Service Ops 📁 Web Sites 📁 Worker 📁 Beta 📁 Beta Dir 📁 C2 📁 C4 📁 C9 📁 C11 📁 C12 📁 AWS 📁 Beta Builds

support.bloyal.com - /Integrations/CounterPoint/POSConnector/

[\[To Parent Directory\]](#)

5/18/2022 11:22 AM 3244960 [POSConnectorForCounterpoint.2.0.854.27.exe](#)

1. While logged into a Windows Administrator account on your Counterpoint POS register system, run the **bLoyal POS Connector for Counterpoint** installer provided by the bLoyal team. You may always find the latest version [here](#).
2. Select install option for **All Users**, if prompted.
3. Click on the **Finish** button to complete the setup.



4. Create bLoyal Buttons in Counterpoint POS

4.1 bLoyal Master Settings

Required to access bLoyal POS Connector settings and toggle bLoyal functionality.

1. Log into Counterpoint with Admin user credentials.
2. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
3. Select the *Touchscreen Code* set you wish to add the bLoyal custom buttons to or create a new *Touchscreen Code* set to add custom buttons for bLoyal functionality. (See Figure 1.1). **Note:** We recommend making a copy of your existing *Touchscreen Code* set and calling the new copy, **BLOYAL**. This way, you can roll out bLoyal to specific registers by setting up and then assigning the new **BLOYAL Touchscreen Code** to registers of your choice. Ordinarily, this would just be one register initially.
4. After you select/create the Touchscreen Code, click **Button Editor** (circled in Figure 1.1).
5. Clicking **Button Editor** will navigate you to the menu shown in Figure 1.2.

Figure 1.1

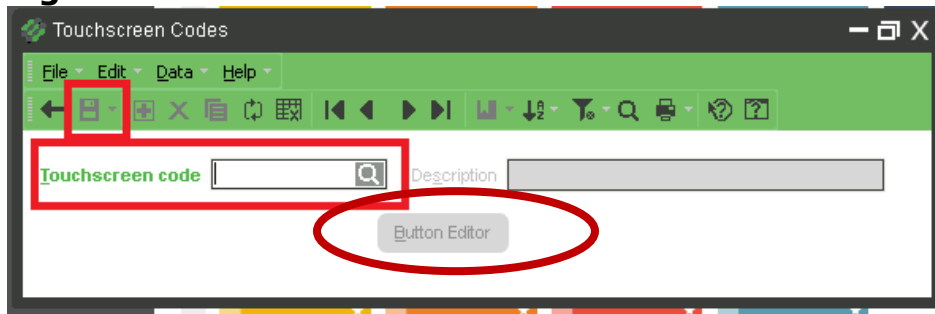


Figure 1.2

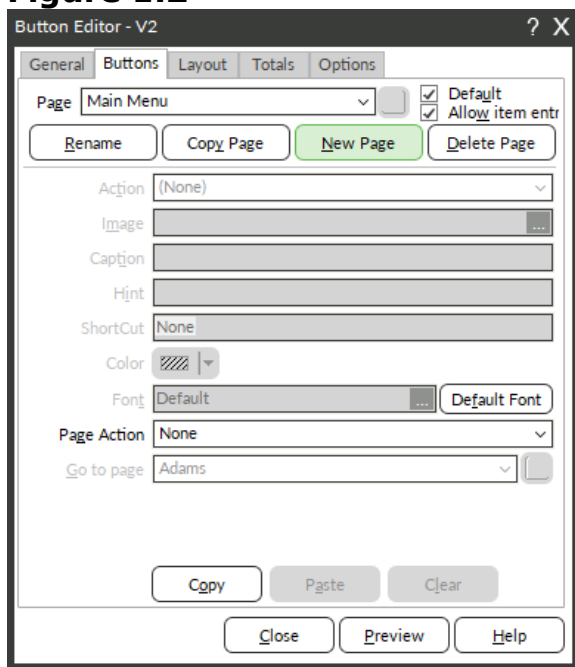
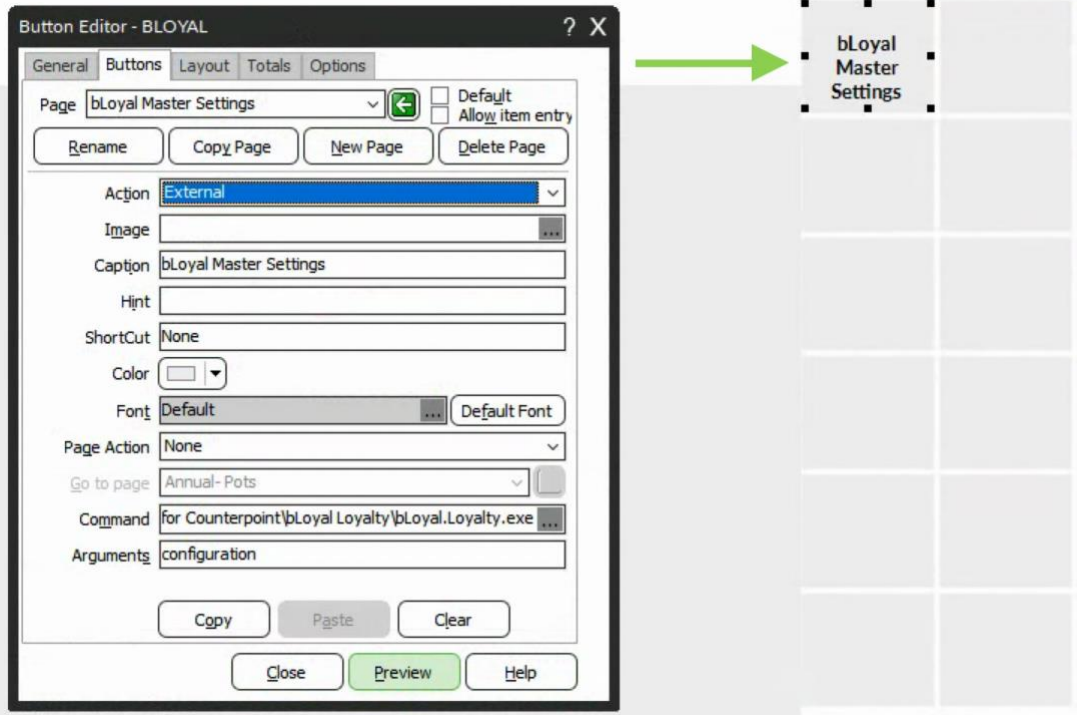


Figure 1.3



6. Once you are on the page shown in Figure 1.2, you may set up a page for the **bLoyal Master Settings**.

- a. Click **New Page** (highlighted in Figure 1.2). Type *bLoyal Master Settings* in the pop-up window to name the page and then click **OK**.
- b. You will be brought to the new page you just created. Select the first button to the right (as pointed out in Figure 1.3) and then type in the **Caption** of the button as *bLoyal Master Settings*.
- c. **Action** = *External*
- d. **Page Action** = *None*
- e. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
- f. **Argument** = *configuration*
- g. Now, select your default/home/main menu page from the **Page** menu.
- h. Click on a blank button that you would like to assign as the **bLoyal Master Settings** button.
 - You may need to increase the number of button columns/rows first on the **General** tab of the Button Editor if no blank buttons are available. You will need to allow room for ~7-10 new buttons, depending on your bLoyal Edition. For example, the *Create Order & Check Inventory* buttons will not be needed if the company will not be using bLoyal order processing.
- i. Type in the **Caption**: *bLoyal Master Settings*
- j. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
- k. Set the button's **Action** as *Run page*, then in the **Run page** dropdown menu below, select the *bLoyal Master Settings* page that you created prior.
- l. Click the **Close** button.
- m. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.2 Hold and Recall Button

This button is necessary for bLoyal functionality and must have a function key bound to it. You may optionally clear its caption and set the font color to match the button box so that it appears as a blank button to staff. If you already have a **Hold and recall** button (not to be confused with **Hold recall** which is a totally different function), you may instead simply add a function key to it (ex., the F12 key) in Counterpoint if one isn't already set. Your chosen function key will also need to be entered into the bLoyal Master Settings as detailed in Section 5.

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes.**
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click on your existing *Hold and recall* button or an empty button slot to the right of your existing header buttons.
 - a. You may need to first increase the number of *Top* buttons on the **General** tab of the Button Editor if none are available. You will need to allow room for 1-2 new buttons up top potentially (depending on whether you already have *Hold and recall* and/or *Void current ticket* buttons set up already).
4. Confirm **Action** is set to *Hold and recall*.
5. Click **ShortCut** and then press the function key (ex., the F12 key) you want to associate it with.
6. Click on the **Close** button and then **Save** the changes (floppy disk icon).



4.3 Void Current Ticket

This must be set up for bLoyal functionality. If you already have a standard **Void current ticket** button, you will need to modify it to add in the necessary bLoyal function that must take place prior to the void (via a button page as explained below). If creating a new button, you may optionally clear its caption/match colors so that it appears as a blank button to staff.

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Void Current Ticket*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: bLoyal Void Current Ticket Function

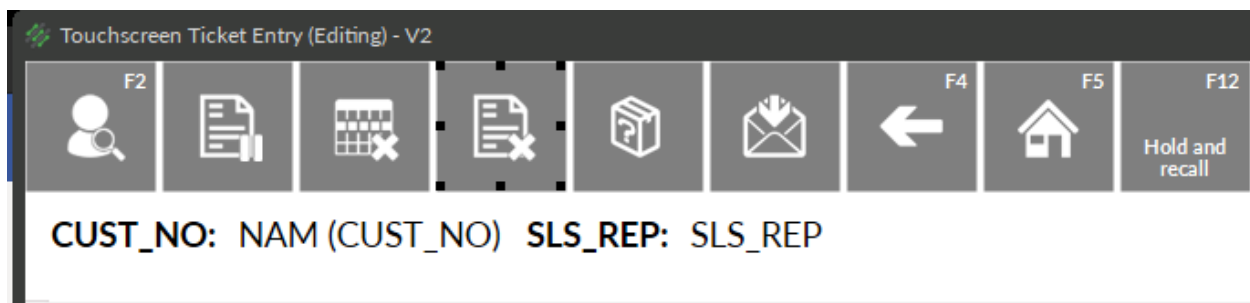
1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *External*
3. **Image** may optionally be set to the bLoyal icon found in:
C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty
4. **Caption** = *bLoyal Void Current Ticket*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *voidcurrentticket*

2nd Button: Void Current Ticket Function

1. Select 2nd button.
2. **Action** = *Void current ticket*

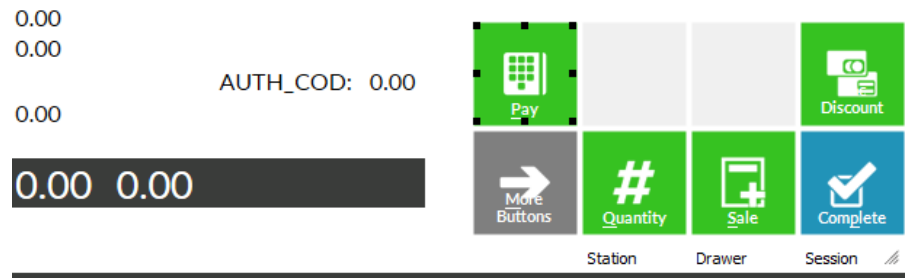
Void Current Ticket Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select your existing **Void Current Ticket** button.
3. **Caption** = *Void Current Ticket*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Void Current Ticket*
6. **Image** may be set to the bLoyal icon found in:
C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).



4.4 bLoyal Pay Button

It is necessary to add the bLoyal Pre-Tender hook prior to launching the standard Pay Codes page.



1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Pay*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: Hold and Recall Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: bLoyal Pre-Tender Function

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in:
C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty
4. **Caption** = *bLoyal Pre-Tender*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *pretender*

3rd Button: Pay Codes

1. Select 3rd Button.
2. **Action** = *Run Page*
3. **Run Page** = *Pay Codes* (or your custom payment tender button page).
4. Click **Close** button.
5. **Save** the settings on the Touchscreen Code window (floppy disk icon).

Modified Pay Button

1. Now, edit your default/home/main menu page from the **Page** menu.
2. Select your existing *Pay* button or create one if not present.
3. **Action** = *Run page*
4. **Run page** = *bLoyal Pay*
5. Click **Close** button.
6. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.5 Find Customer Button

This required button allows customer search, selection, and creation. Also displays some high-level customer info.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Find Customer*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: Add Item Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Item*
3. Select *Price-1* in the **Item** field (used as the bLoyal 0 Quantity placeholder item).
4. Set *Default qty* = 0.

2nd Button: Hold and Recall Function

1. Select 2nd button.
2. **Action** = *Hold and recall*

3rd Button: bLoyal Find Customer Function

1. Select 3rd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in:
C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty
4. **Caption** = *bLoyal Find Customer*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *findcustomer*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Find Customer Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Find Customer** button.
3. **Caption** = *bLoyal Find Customer*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Find Customer*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.6 View Customer Button

View/edit all customer information with this required button.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal View Customer*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: Hold and Recall Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: bLoyal View Customer Function

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in:
C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty
4. **Caption** = *bLoyal View Customer*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *viewcustomer*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal View Customer Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal View Customer** button.
3. **Caption** = *bLoyal View Customer*
4. **Action** = *Run page*
5. **Run page** = *bLoyal View Customer*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.7 Quick Signup Button

This button will make it very easy and quick to sign up new customers using a pre-configured signup form with required and optional customer fields of your choosing. These are configured in bLoyal Director under **Channels => POS Snippet Profiles**.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Quick Signup*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: Add Item Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Item*
3. Select *Price-1* in the **Item** field (used as the bLoyal 0 Quantity placeholder item).

2nd Button: Hold and Recall Function

1. Select 2nd button.
2. **Action** = *Hold and recall*

3rd Button: bLoyal Quick Signup Function

1. Select 3rd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in:
C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty
4. **Caption** = *bLoyal Quick Signup*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *quicksignup*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Quick Signup Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Quick Signup** button.
3. **Caption** = *bLoyal Quick Signup*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Quick Signup*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.8 Quick Edit Button

This button will make it very easy and quick to edit existing customer info using the same Quick Signup form utilized for new customers.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes.**
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Quick Edit*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: Hold and Recall Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: bLoyal Quick Edit Function

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in:
C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty
4. **Caption** = *bLoyal Quick Edit*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *quickedit*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Quick Edit Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Quick Edit** button.
3. **Caption** = *bLoyal Quick Edit*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Quick Edit*
6. **Image** may be set to the bLoyal icon found in:
C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.9 Apply Coupon Button

Use to view and apply coupons powered by bLoyal.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Apply Coupon*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: *Hold and Recall* Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: *bLoyal Apply Coupon* Function

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
4. **Caption** = *bLoyal Apply Coupon*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *applycoupon*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Apply Coupon Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Apply Coupon** button.
3. **Caption** = *bLoyal Apply Coupon*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Apply Coupon*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.10 Gift Card Button

Use to redeem gift cards powered by bLoyal. You may also check gift card balances.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Gift Card*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: *Hold and Recall Function*

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: *bLoyal Gift Card Function*

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in:
C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty
4. **Caption** = *bLoyal Gift Card*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *giftcard*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Gift Card Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Gift Card** button.
3. **Caption** = *bLoyal Gift Card*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Gift Card*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.11 Loyalty Tender Button

Use to redeem Loyalty Currency powered by bLoyal. You may also use this to view the current customer's Loyalty Currency balance.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Loyalty Tender*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: *Hold and Recall* Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: *bLoyal Loyalty Tender* Function

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
4. **Caption** = *bLoyal Loyalty Tender*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *loyalty*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Loyalty Tender Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Preview Discount** button.
3. **Caption** = *bLoyal Loyalty Tender (or other naming of your choice)*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Loyalty Tender*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.12 Preview Discount Button

Optional button that opens a window listing qualifying bLoyal discounts and accruals for the current transaction. You may also use this to choose discounts to exclude.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Preview Discount*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: **Hold and Recall Function**

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: **bLoyal Preview Discount Function**

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
4. **Caption** = *bLoyal Preview Discount*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *previewdiscount*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Preview Discount Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Preview Discount** button.
3. **Caption** = *bLoyal Preview Discount*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Preview Discount*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.13 QuickLink Button

Optional home page-style POS Snippet with a collection of bLoyal functions such as Find Customer, View Customer, and so forth.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal QuickLink*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: *Hold and Recall* Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: *bLoyal QuickLink* Function

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
4. **Caption** = *bLoyal QuickLink*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *quicklink*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal QuickLink Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal QuickLink** button.
3. **Caption** = *bLoyal QuickLink*
4. **Action** = *Run page*
5. **Run page** = *bLoyal QuickLink*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.14 Create Order Button

Create a shipping or pickup order right at the POS. The Order Processing bLoyal Plug-In is required as part of your service plan.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Create Order*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: *Hold and Recall* Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: *bLoyal Create Order* Function

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
4. **Caption** = *bLoyal Create Order*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *createorder*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Create Order Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Create Order** button.
3. **Caption** = *bLoyal Create Order*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Create Order*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.15 Check Inventory Button

Check inventory right at the POS. The Order Processing bLoyal Plug-In is required as part of your service plan.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes**.
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Check Inventory*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: *Hold and Recall* Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: *bLoyal Check Inventory* Function

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
4. **Caption** = *bLoyal Check Inventory*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *checkinventory*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Check Inventory Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Check Inventory** button.
3. **Caption** = *Check Inventory*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Check Inventory*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.16 Exclude Discount Button

You may optionally add this button to give staff the ability to manually exclude discounts.

Create New Page

1. Go to **Home => Setup => Point of Sale => Touchscreen Codes.**
2. Select the *Touchscreen Code* set you had previously chosen to add bLoyal buttons to (See Figure 1.1), then click **Button Editor** (circled in Figure 1.1).
3. Click **New Page** and entitle it: *bLoyal Exclude Discount*
4. You will be presented with a new page of touchscreen buttons (on the right side of the screen).

1st Button: Exclude Discount Function

1. Select 1st button at the right side of the screen (top-leftmost button).
2. **Action** = *Hold and recall*

2nd Button: Exclude Discount Function

1. Select 2nd button.
2. **Action** = *External*
3. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
4. **Caption** = *bLoyal Exclude Discount*
5. **Command** = *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty\bLoyal.Loyalty.exe*
6. **Argument** = *excludediscount*
7. Click **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).

bLoyal Exclude Discount Button

1. Now, select your default/home/main menu page from the **Page** menu.
2. Select a blank button that you would like to set up as your **bLoyal Exclude Discount** button.
3. **Caption** = *bLoyal Exclude Discount*
4. **Action** = *Run page*
5. **Run page** = *bLoyal Exclude Discount*
6. **Image** may be set to the bLoyal icon found in: *C:\Program Files (x86)\bLoyal\POS Connector for Counterpoint\bLoyal Loyalty*
7. Click the **Close** button.
8. **Save** the settings on the Touchscreen Code window (floppy disk icon).



5. bLoyal Master Settings Configuration

Once all the custom buttons are setup, click the **bLoyal Master Settings** button and configure as explained below. Click the **Save** button when finished.

**Required settings have an asterisk.*

The screenshot shows the 'bLoyal Configuration' window with the following sections:

- Loyalty Engine Credentials:** Includes fields for 'Login Domain' and 'API Key'. Buttons for 'Lock', 'Test bLoyal Connection', and 'Provision' are present. The 'Connection Status' is 'Pass'.
- bLoyal Custom Settings:** Includes fields for '0 Quantity Product Code', 'Customer Category Code', 'Hold and Recall Keystroke', and 'Domain URL'.
- bLoyal Loyalty Tender Code:** A dropdown menu showing 'BLLOYALTY'.
- bLoyal Gift Card Tender Code:** A dropdown menu showing 'BLGIFTCARD'.
- Hide Pre Tender Screen:** A checkbox that is currently unchecked.
- NCR Database Credentials:** Includes fields for 'Server Name' and 'Database Name'. An 'Authentication' dropdown is set to 'SQL Server Authentication'. Fields for 'User ID' and 'Password' are also present. Buttons for 'Test Database Connection' and 'Load Configuration' are shown. The 'Connection Status' is 'Pass'.
- Counterpoint Gift Card Item Numbers:** A list box containing 'GIFTCARD' with 'Add' and 'Remove' buttons. Below it are fields for 'Counterpoint Gift Card Item Number' and 'Complete Button Keystroke'.

At the bottom of the window, there are buttons for 'Get bLoyal Service URLs', 'Disable bLoyal', 'Save', and 'Cancel'. The version number '2.0.854.27' is displayed in the top right corner.



Field (* = Required)	Description
Login Domain*	This is the company Login Domain used to access bLoyal Director.
API Key*	This is a Device API Key generated by the bLoyal team for you.
Lock*	This will generate the Access Key used to access the bLoyal APIs.
Test Connection	This will test the type of API key and connection with the bLoyal APIs. Use after you have already locked the key.
0 Quantity Product Code*	A zero-quantity and \$0 cost virtual product that is required by Counterpoint to <i>Hold and recall</i> new tickets. This is automatically stripped from transactions by the bLoyal stored procedures. Enter <i>Price-1</i> here.
Customer Category Code*	Counterpoint has a code associated to customers on creation. This setting should match whatever the default is in the store settings in Counterpoint.
Hold and Recall Keystroke*	The function key binding tied to the <i>Hold and recall</i> button. Ex.: If you had set <i>Hold and recall</i> to the F7 key, you would enter <i>F7</i> .
Domain URL	Use only if instructed by bLoyal team. Normally blank.
bLoyal Loyalty Tender Code	The bLoyal team will set up your Loyalty Currency tender code in Director. Default: <i>LOYALTY</i>
bLoyal Gift Card Tender Code	The bLoyal team will set up your Gift Card tender code in Director. Default: <i>GIFTCARD</i>
Hide Pre-Tender Screen	Optionally hide the <i>Preview Discount</i> pop-up window which displays the loyalty to be accrued/redeemed and/or discounts to occur in the current transaction when clicking the <i>Pay</i> button.
Get bLoyal Service URLs	Obtain a listing of your bLoyal Service URLs for troubleshooting purposes.
Disable bLoyal	Temporarily disable bLoyal in Counterpoint. This is useful when troubleshooting an issue or if your internet connection is down.
Server Name*	This is the name of the SQL server containing your NCR Counterpoint database. The full server's name is required. Please note: (<i>local</i>), <i>local</i> , and <i>localhost</i> will not work.
Database Name*	This is the name of your NCR Counterpoint store database.
Authentication*	Type of database authentication to be selected. Usually <i>SQL Server Authentication</i> is used (w/ SQL admin credentials).
User ID*	This is the SQL admin username used to access the NCR Counterpoint database using server authentication.
Password*	This is the password for the SQL admin user to access the NCR Counterpoint database using server authentication.
Test Database Connection	You may use this button to verify the entered credentials for the Counterpoint store database.
Counterpoint Gift Card Item Numbers	Enter in the lookup code(s) for your gift card item(s) for sale in the field below then click the Add button (if applicable).

5.1 Create Stores in bLoyal

While your bLoyal Project Manager will initially be setting up your store(s) and device(s) in Director, the below information is useful should you ever need to do so yourself:

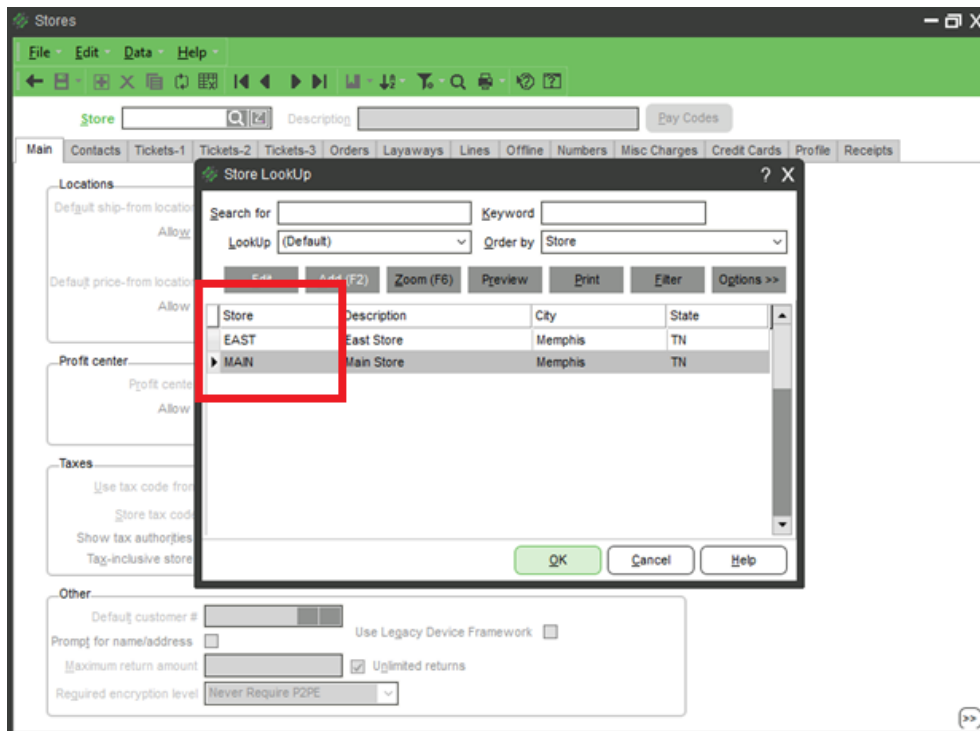
1. Login to bLoyal Director with valid credentials and click on **Channels => Stores**.
2. Click the **New** button and enter the below details
 - *Title*
 - *Type*
 - **Code (Please make sure your bLoyal Store Code must be same StoreID in NCR Counterpoint(STR_ID).**
 - *Application System:* Choose Counterpoint.
 - *Brand*
 - *Any of the other optional information*
3. Click **Save** [floppy disk icon]. A Store Key will be generated after saving which you may use in the bLoyal Backoffice Connector for Counterpoint for this particular store.

To get all stores in NCR Counterpoint Database:

```
select *FROM [{DatabaseName}].[dbo].[PS_STR]
```

-OR-

1. Open Counterpoint.
2. Navigate to **Setup => Point of Sale => Stores**
3. Click on the **Search** icon [magnifying glass].
4. Store Codes will be listed in the **Stores** column (see below):



5.2 Create Devices in bLoyal

While your bLoyal Project Manager will initially be setting up your store(s) and device(s) in Director, the below information is useful should you ever need to do so yourself:

9. Login to bLoyal Director with valid credentials and click on **Channels => Devices**.
10. Click the **New** button and enter the below details:
 1. **Device Code (This must be same as the Station ID(STA_ID) in NCR Counterpoint)**
 2. **Device Name**
 3. **Device Type: Typically POS Lane or Mobile POS Lane**
 4. **Application System: Choose Counterpoint.**
 5. **Order Channel: Typically POS**
 6. **POS Snippet Configuration: Select your POS Snippet Profile**
 7. **Any of the other optional information**
11. Click **Save** [floppy disk icon]. A Device Key will be generated after saving which you may use in the bLoyal POS Connector for Counterpoint for this particular device.

To get all Stations (devices) in NCR Counterpoint Database:

Select * FROM [{DatabaseName}].[dbo].[PS_STA]

-OR-

1. Open Counterpoint.
2. Navigate to **Setup => Point of Sale => Stations**.
3. Click on the **Search** icon [magnifying glass].
4. Station IDs will be listed in the **Station** column (see below):

