



bLoyal

NCR Counterpoint Backoffice 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
- NCR Counterpoint v8.5.6.x or greater

2. Prerequisites

There are several bLoyal URLs that are accessed when performing backoffice and POS actions. If you encounter any connectivity issues or would like to ensure connectivity with bLoyal just as a precaution, please whitelist the following domains on your network:

- ***.bloyal.io**
- ***.bloyal.com**
- ***.loyaltydirector.com**

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. Initial bLoyal Director Configuration

3.1 Create Application System

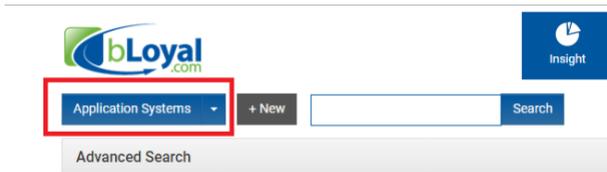
1. Log in to bLoyal Director with valid credentials and click **Setup** in the upper-right corner, then click the **Settings** tab on the left-hand side, followed by **Grid Setup** under the *Grid Service Configuration* header. If any of these modules do not appear, your account may not have the proper access permissions. Please get in touch with your management team (or if a POS partner, your partner company's management team) in order to grant access to your Director account.

Grid Service Configuration:

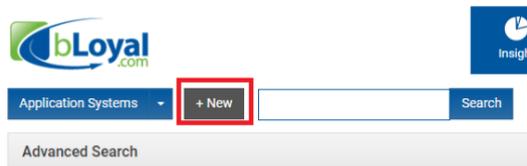
Grid Setup

The Loyalty Grid is an integration service used to integrate external systems with your bLoyal account. Use the *Grid Setup* editor to configure and monitor your integrations. Ordinarily, bLoyal will set this all up for you during deployment, so there should be no need to make any changes. Please contact Support for assistance.

2. Click the drop-down menu in the upper-left corner and select **Application Systems**:



3. Click the **+New** button:



4. Enter the following details and click the **Finish** button to create the Application System (example follows):

- **Name** – *Counterpoint*
- **Order Discount Behavior** – *Native*
- **Order Discount Code** – *[Optional]*
- **Order Discount Name** – *[Optional]*
- **Shipping Charge Behavior** – *Line*
- **Shipping Charge Code** – *POS.Shipping*
- **Shipping Charge Name** – *Shipping Fee*
- **Tax Behavior** – *Line*
- **Tax Charge Code** – *POS.SalesTax*
- **Tax Charge Name** – *Destination Sales Tax*

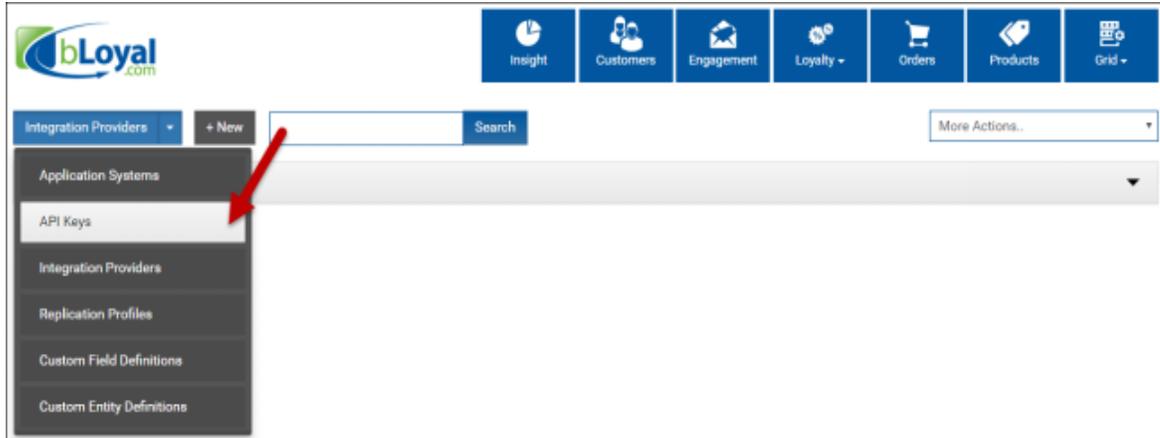
Application Systems ▾ + New More Actions.. ▾

Name	<input type="text" value="Counterpoint"/>	Order Discount Code	<input type="text"/>	Order Discount Name	<input type="text"/>
Order Discount Behavior	<input type="text" value="Native"/>	Shipping Charge Code	<input type="text" value="POS.Shipping"/>	Shipping Charge Name	<input type="text" value="POS.Shipping"/>
Shipping Charge Behavior	<input type="text" value="Line"/>	Tax Charge Code	<input type="text" value="POS.SalesTax"/>	Tax Charge Name	<input type="text" value="POS.SalesTax"/>
Tax Behavior	<input type="text" value="Line"/>	Disable Order Engine	<input type="checkbox"/>	Create Sales Transactions from Cart Commitments	<input type="checkbox"/>

3.2 Create a bLoyal API Key for Backoffice Connector

A bLoyal client API key will be required for the bLoyal Backoffice Connector for Counterpoint to securely communicate with your bLoyal account. This is also managed from the Grid Setup user interface in bLoyal Director:

1. Click the drop-down navigation menu in the upper-left corner and select **API Keys**:



2. Click the **+New** button:





3. Configure the newly created API key for use with the backoffice connector:
 - **Name** – *Counterpoint Backoffice*
 - **Application System** – Choose the Counterpoint application system you created in the prior step.
 - **Connector** – *bLoyal Counterpoint Backoffice Connector*
 - **Key Type** – *Client*
 - **Connector Profile** – *Default*
4. Please save the new API key and copy it for the following step.
5. Click **Finish**.

4. bLoyal Backoffice Connector for NCR Counterpoint

In order to add bLoyal functionality within NCR Counterpoint, some bLoyal-specific settings and applications are required. These settings and applications are required to enable bLoyal functionality at the POS as well as to operate the backend data replication service and initial setup which this document focuses on. The following sections will guide a user through the installation and configuration of the bLoyal integration on the NCR Counterpoint machine.

4.1 Install the bLoyal NCR Counterpoint Components

On the NCR Counterpoint machine:

1. Download the latest version of the bLoyal Backoffice Connector for Counterpoint: <https://support.bloyal.com/Integrations/CounterPoint/BackofficeConnector>
2. Navigate to the folder containing the downloaded executable.
3. Double-click on the application to begin setup. If not logged into a Windows account with Administrator permissions, you may need to right-click the installer file and choose **Run as Administrator** and enter in admin credentials, if prompted.
4. Install for all users, if prompted.
5. Once the installation completes, click **Finish**.



4.2 bLoyal Backoffice Connector Configuration

Once the bLoyal Backoffice Connector for NCR Counterpoint has been installed, please follow the below steps to complete the configuration.

The bLoyal integration with NCR Counterpoint offers a backoffice data replication mechanism in which entities such as Departments, Products, Customers, Sales Transactions, etc. are replicated between the two systems. This mechanism operates as a Windows service and data replication is performed automatically.

NOTE: Please consult with bLoyal Support if you have any questions regarding configuring the data replication interval in bLoyal Director.

1. Go to **C:\Program Files (x86)\bLoyal\Backoffice Connector for Counterpoint\Backoffice Connector for Counterpoint**
2. Run **NCRCounterpoint.Backoffice.Connector.Configuration.App.**
3. Fill out the following as described below:

Loyalty Engine Credentials

Login Domain:

API Key:

Lock Test bLoyal Connection

Connection Status: X

bLoyal Custom URLs

Domain URL:

Domain URL

NCR Database Credentials

Server Name:

Database Name:

Authentication:

User ID:

Password:

Test Database Connection Update Database

Connection Status: X

Data Sync Scheduler Service

Start Stop

Next Sync Time: 0

Last Sync Result

Save Cancel



Field (* = required)	Description
Login Domain*	This is the same company name used to access bLoyal Director.
API Key*	This is a Client API Key generated within bLoyal Director as directed in Section 3.2.
Domain URL	Use only if specific instructions have been provided by bLoyal staff. Not common.
Server Name*	This is the name of the SQL server containing your NCR Counterpoint database. The full server name is required; “(local)”, “local”, and/or “localhost” will not work.
Database Name*	This is the name of your NCR Counterpoint database.
Authentication*	Type of database authentication to be selected.
User ID*	This is the username used to access the NCR Counterpoint database using server authentication.
Password*	This is the password for the above DB user to access the NCR Counterpoint database using server authentication.
Test Database Connection	Use to test the database name and credentials entered in.
Update Database*	Use to add bLoyal tables and Stored Procedures into the Counterpoint Database. This is required for functionality.

4. Click the **Lock** button.
5. Click the **Test Database Connection** button to verify it can be reached successfully.
6. If the connection status for the Database Tab is “Pass,” click the **Update Database** button.
7. Click the **Save** button.

The **Stop** button will become illuminated, indicating that the data replication service is now running and can be stopped, if needed. When the **Start** button is illuminated, that means the service is currently stopped. We recommend always having the service running (i.e., **Stop** button illuminated) so that data is always up to date.



5. Additional bLoyal Director Configuration

5.1 Configure Inventory Location in Director

1. **You may skip this section if you will not be syncing inventory with bLoyal.** Log into your bLoyal Director account and click **Setup** (top-right). If this module does not appear, your account may not have the proper access permissions. Please get in touch with your management team (or if a POS partner, your partner company's management team) in order to grant access to your Director account.
2. Go to **Inventory Locations** and click the blue ID number for your Counterpoint store's inventory location. If it does not yet exist, click on the **New** button to create one.
3. Enter the below details and click the **Save** button (floppy disk icon) at any time to save your progress and also when finished:
 - **Title** – This is the name of the inventory location.
 - **Web Alias** (*Optional*) – The name as it would appear on the web should a different web naming scheme be preferred.
 - **Code** – Identifying code of the location for database purposes. *Please make sure your bLoyal Inventory Location Code is same as the corresponding Location ID in NCR Counterpoint (LOC_ID).* See queries below on how to obtain this information. No spaces or special characters allowed.
 - **Phone 1** – (*Optional*)
 - **Phone 2** – (*Optional*)
 - **Address**
 - **City**
 - **ZIP Code**
 - **State**
 - **Master Site** – Select the corresponding Counterpoint store which should have been created when you set up and ran the backoffice connector for the first time.

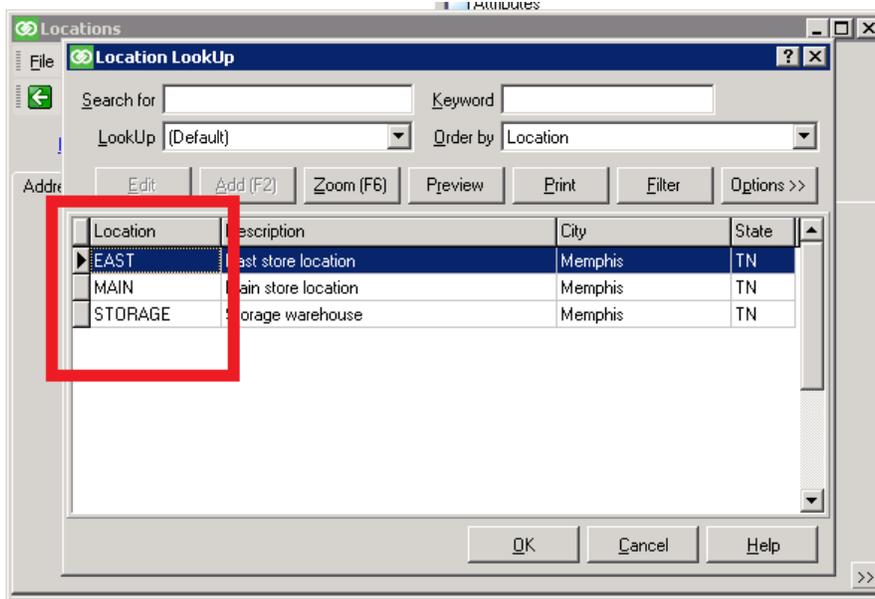
CREATE INVENTORY LOCATION	
More Actions...	
Title:	
Web Alias:	Code:
Phone 1:	Phone 2:
Address:	
City:	
State:	ZIP Code:
Country:	United States
Master Site:	A Test Store (ATS) Used for inventory replication
Description:	
Options:	<input checked="" type="checkbox"/> Inventory can be shipped from this location
	<input checked="" type="checkbox"/> This location is capable of replicating data
	<input checked="" type="checkbox"/> Customers can carry out orders from this location
	<input checked="" type="checkbox"/> Customers can pick up orders from this location

Query to get all inventory locations from NCR Counterpoint Database:

```
SELECT * FROM [{DatabaseName}].[dbo].[IM_LOC]
```

OR

- Go to Counterpoint SQL.
- **Setup => Inventory => Locations**
- Click on the **Search** icon.
- Below is an example of Counterpoint Location Codes (in the UI):



5.2 Configure Store in Director

Log in to bLoyal Director with valid credentials and click on **Channels** and then **Stores**. If these modules do not appear, your account may not have the proper access permissions. Please get in touch with your management team (or if a POS partner, your partner company's management team) in order to grant access to your Director account.

- Click the blue ID number for your Counterpoint store which should have been automatically created after initially setting up and running your backoffice connector and verify/enter the below details:
 - Title** – This is the name of the store.
 - Type** – *Physical Store*
 - Code** – *Your bLoyal Store Code must be the same as the corresponding Store ID (STR_ID) in NCR Counterpoint. See below on how to look this up.*
 - Application System** – Select Counterpoint.
 - Customer Partition** – Select if you are utilizing multiple customer partitions.
 - Brand** – Choose this if using bLoyal brand/receipt templates.

EDIT STORE 110: A TEST STORE	
More Actions...	
Store Key:	SQBLDNDCAT-SRSPWTEXUY
Title:	A Test Store
Type:	Virtual Store
Code:	ATS
Status:	Active
Backup:	Daily
Address:	
City:	
State:	
ZIP Code:	
Country:	United States
Timezone:	Default ((UTC-08:00) Pacific Time (US & Canada))
Language Code:	
Application System:	NCR Backoffice Connector
Brand:	Default Brand
Customer Partition:	West Coast
Product Partition:	None

- You may skip the following if you will not be syncing inventory with bLoyal.** At the bottom of the store entry, click the **Add** button and select the inventory location created in the prior step (example on next page). Make sure to check the **Replicate Inventory** checkbox for the location. If yours or your partner company will be performing order processing in Director, you may also mark off the pickup and shipping default checkboxes as applicable. This will cause orders created in Director under this store to default the inventory location for all the order processing users.

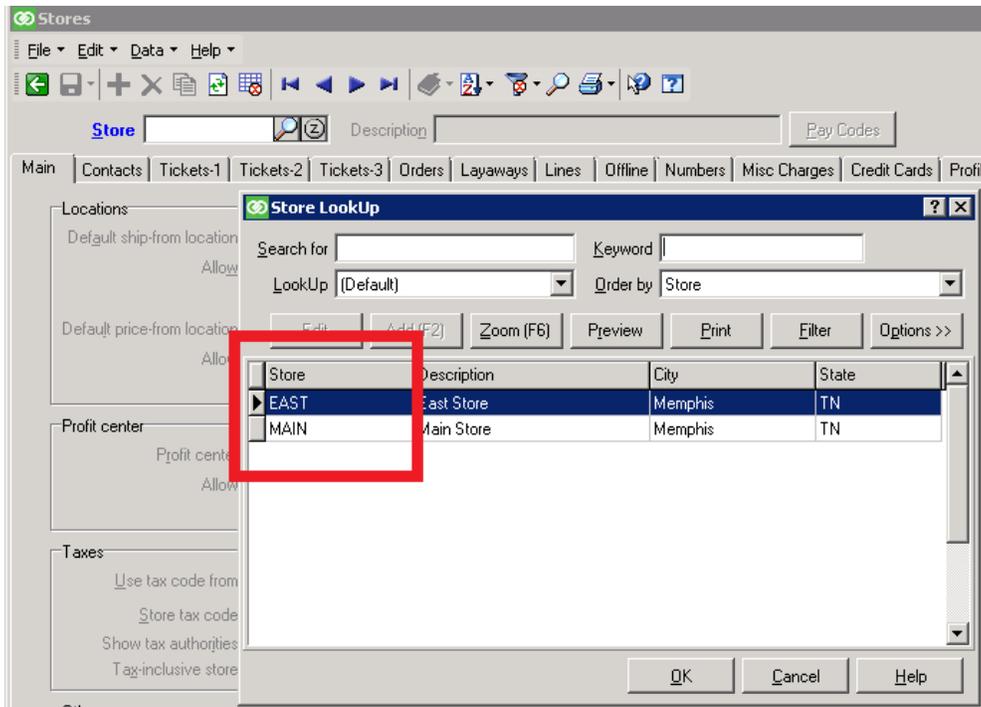
Inventory Locations							Add...
ID	Location	Replicate Inventory	Fulfill Shipping	Carry Out Orders	Pickup Orders	Remove	
6	Company Warehouse	<input checked="" type="checkbox"/> Default	<input checked="" type="checkbox"/> Default	n/a	n/a	X	

Get all Store in NCR Counterpoint Database:

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

OR

- Go to Counterpoint SQL.
- **Setup => Point of Sale => Stores**
- Click on the **Search** icon.
- Example Counterpoint Store Codes are highlighted below in the screenshot:





6. Supplemental Information

6.1 bLoyal Custom Stored Procedures and Custom Tables

The bLoyal integration uses custom stored procedures and SQL tables that work with the bLoyal Backoffice and POS Connectors for Counterpoint. In order to install the stored procedures, the bLoyal Backoffice Connector's **Update Database** button (in *Master Settings*) is responsible for adding the stored procedures and tables into the Counterpoint Database. Please make sure that your SQL user account has full read/write permissions for the connected database. See Section 4.2 for more details.

We make use of Counterpoint's *Hold and Recall* function to run our stored procedures in order to move data between the tables. Typical workflow would be *Hold and Recall -> Run our executable with an argument -> Hold and Recall*. This is all set up through Counterpoint's touchscreen codes.

When our executable is run, it will then launch a snippet according to the argument given. *Apply Discount*, *Void Current Ticket*, and *Configuration* do not launch a snippet but instead will launch a Win Form. The POS connector will *Calculate the Cart -> Launch Snippet -> Get Cart -> Update our SQL Tables with the Cart -> Send a Keystroke to issue a Hold and Recall*—all within our executable.

Counterpoint does not allow a *Hold and Recall* unless there is at least one item on the ticket. To get around this, we add an item (configured in the Counterpoint Run page) before launching the *Find Customer* and *Quick Signup* snippets. This item is then stripped off by a stored procedure that is issued during the *Hold and Recall* before launching our executable.

Within the bLoyal connectors' *Master Settings*, we add which function key is associated with the *Hold and Recall* button as well as the product code for our zero-quantity product that gets stripped off the ticket.

6.2 List of bLoyal Buttons That Can be Added to Counterpoint

- **Find Customer**
- **View Customer**
- **Quick Signup**
- **Quick Edit**
- **Apply Coupon**
- **Create Order**
- **Apply Discount** – We suggest naming it: **Preview Discount**
- **Exclude Discount**
- **Check Inventory**
- **QuickLink™**
- **Configuration** – Opens *Master Settings*.
- **Pre-Tender** – Calcs and approves the cart and launches the *Preview Discount* screen if there is a discount on the cart. Also launches *Approve Alerts*.
- **Void Current Ticket** – Clears out the current ticket from our bLoyal Tables in SQL Database.