bLoyal

NCR Counterpoint POS Connector

Installation Guide

Last Updated: February 27th, 2025

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:

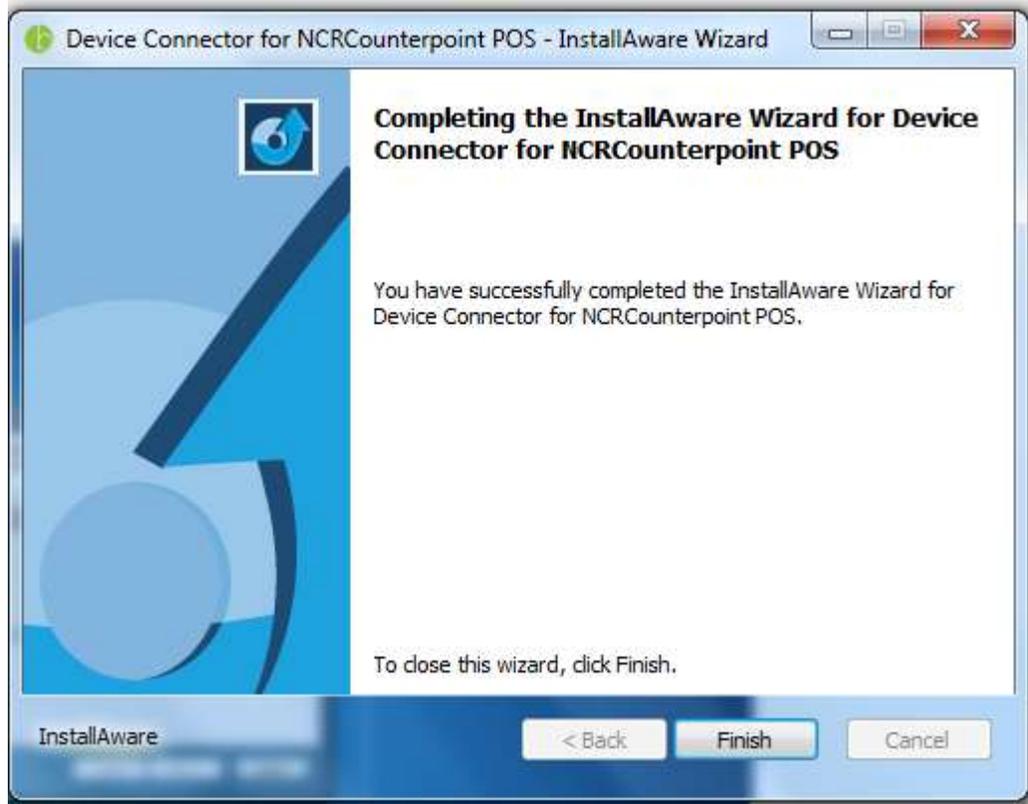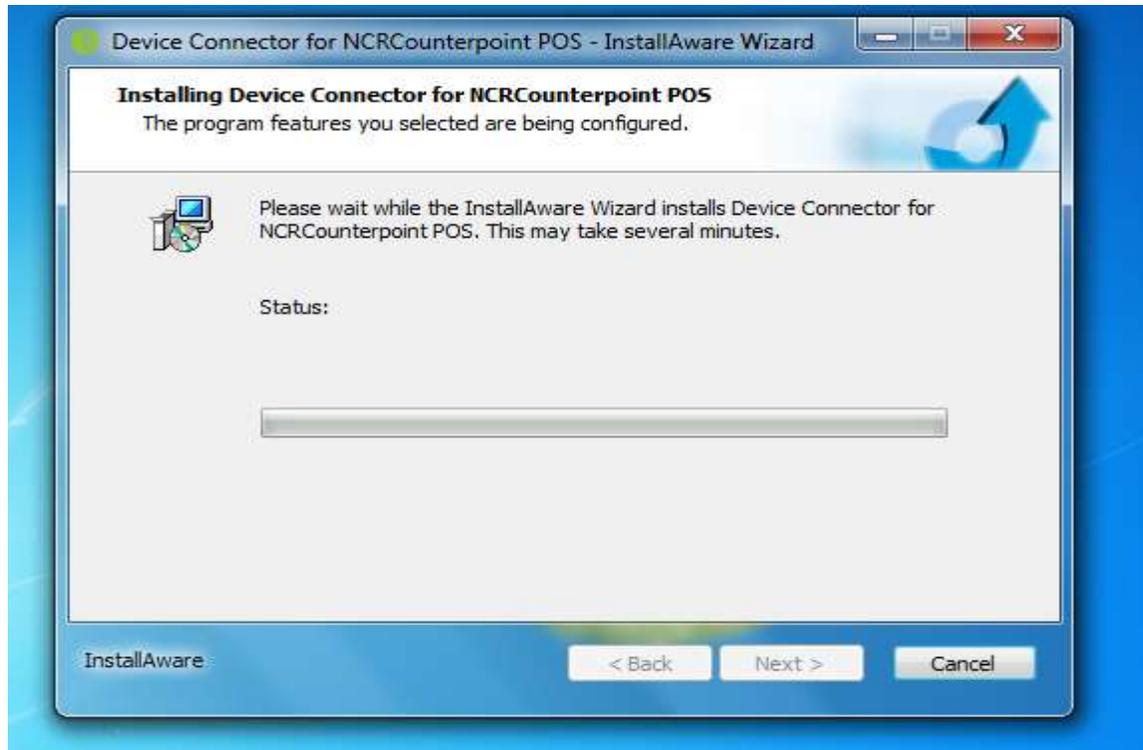- SQL Server 2008 R2.
- .NET Framework 4.7.2 or greater

2. Prerequisites

1. Log in to Counterpoint with Admin-level credentials.
2. Navigate to the Stores Settings and go to "Ticket-3" and make sure that the "Automatic for line changes" is not checked. This setting can be found under the "Hold and recall" section.
3. 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**

3. Install bLoyal POS Connector for Counterpoint

1. The bLoyal POS Connector for Counterpoint can be found at https://support.bloyal.com/Integrations/CounterPoint/POSConnectorForCounterpoint

2. Once the Zip file has been downloaded, please make sure to extract the contents before running the executable.

3. 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.

4. The bLoyal POS Connector for Counterpoint will be saved in the Counterpoint TopLevel folder. This folder should contain the Counterpoint Company Folder. Ex. C:\Program Files (x86)\Radiant Systems\CounterPoint\CPSQL.1\Toplevel

5. Click on the **Finish** button to complete the setup.

bLoyal

Device Connector for NCRCounterpoint POS - InstallAware Wizard

Installing Device Connector for NCRCounterpoint POS
The program features you selected are being configured.

Please wait while the InstallAware Wizard installs Device Connector for NCRCounterpoint POS. This may take several minutes.

Status:

InstallAware   < Back   Next >   Cancel

Device Connector for NCRCounterpoint POS - InstallAware Wizard

Completing the InstallAware Wizard for Device Connector for NCRCounterpoint POS

You have successfully completed the InstallAware Wizard for Device Connector for NCRCounterpoint POS.

To close this wizard, click Finish.

InstallAware   < Back   Finish   Cancel

4. Create bLoyal Buttons in Counterpoint POS

The bLoyal POS Connector for Counterpoint hooks into the Counterpoint Touchscreen through the Touchscreen Code Buttons. One Touchscreen Code will need to be made or edited with certain Buttons. This Touchscreen Code can then be used for any register.

Not all of the bLoyal Buttons are necessary and the bLoyal team will provide you with the necessary buttons for your integration. Some of the bLoyal Buttons including, Find Customer, Void Current Ticket, and Pretender require a run page, while the others can just be custom action buttons.

bLoyal Pretender must be performed before tendering the ticket. Stated in section 4.4, customizing the Counterpoint Pay Button is the best way to ensure that Pretender. Pretender does not work in a run page that goes directly to a payment type such as cash or credit. Because of this, it is recommended to put all tender types in the Counterpoint Pay Codes page and create a run page that will perform a bLoyal Pretender followed by a button page action to the Pay Codes page.
If your integration is using bLoyal Loyalty Tendering or bLoyal Gift Card Tendering, please add those custom actions into the Native Counterpoint Pay Codes Button Page.

bLoyal Void Current Ticket helps to remove ticket data from the bLoyal Carts. Stated in section 4.3, please customize the existing Counterpoint Void Current Ticket to be a run page that consists of our bLoyal Void Current Ticket Custom Action followed by the native counterpoint Void Current Ticket.

bLoyal Find Customer and bLoyal Quick Signup require a run page as an Item needs to be added before the custom action is ran.

There are many ways to implement the bLoyal Buttons. They can be added to the main menu page as custom actions or run pages. They can also be added to a custom bLoyal button page and all the custom actions and run pages (besides bLoyal PreTender and bLoyal Void Current Ticket) can be added there.

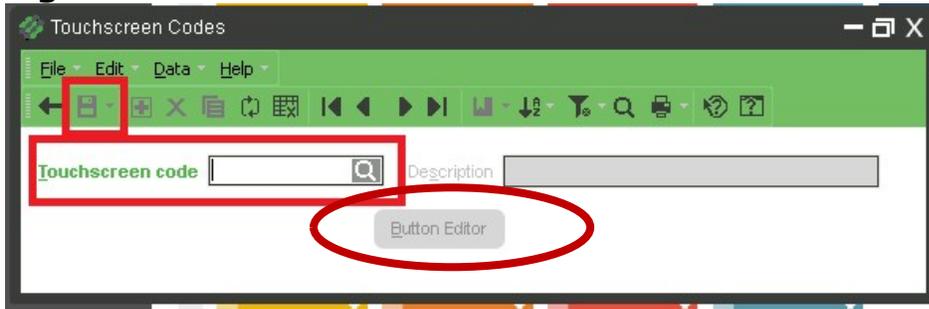The next sections explain how each button should be added to a Counterpoint Touchscreen Code.

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.
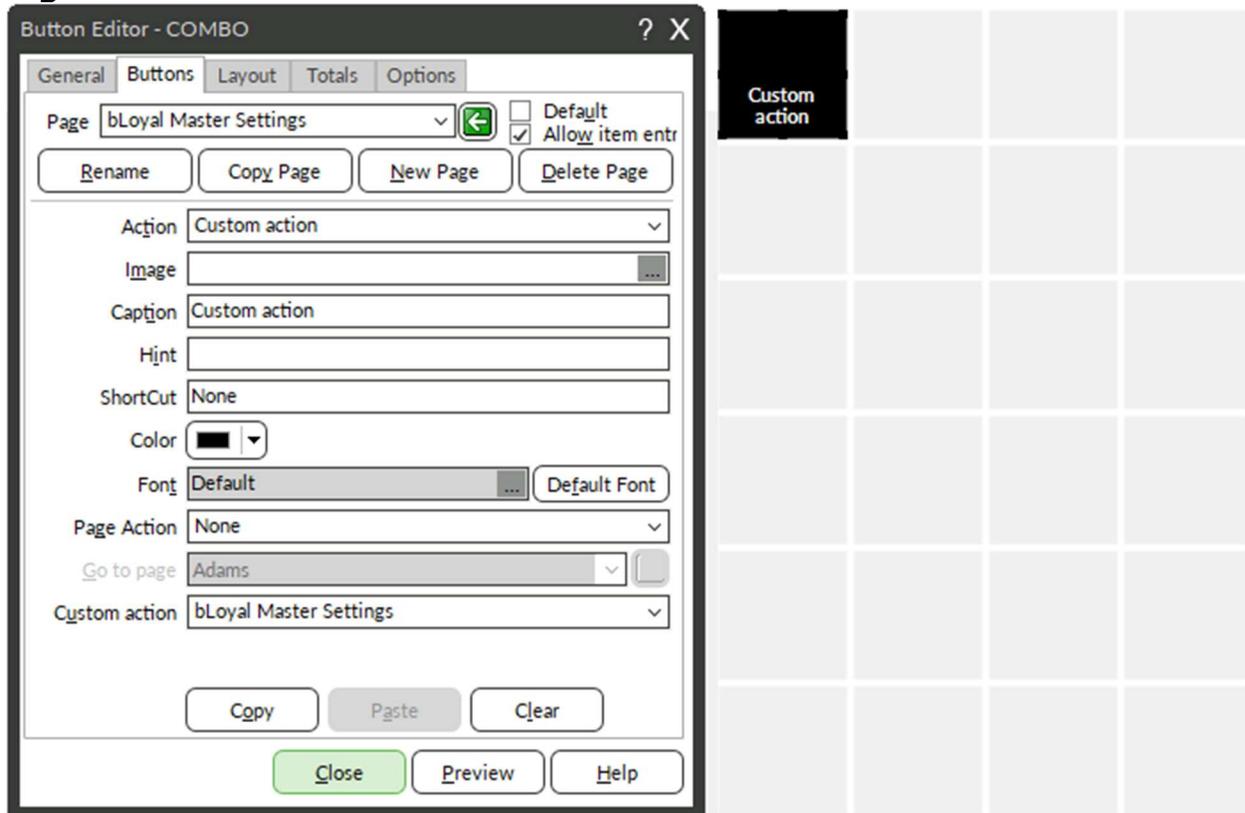
Figure 1.1

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. Navigate to where you would like to save the bLoyal Master Settings Button. This can be the main menu or on a custom created bLoyal Button Page.
       • 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.

    b. Select the button you would like as your bLoyal Master Settings Button.
    c. **Action** = *Custom Action*
    d. **Page Action** = *None*
    e. **Custom Action** = *bLoyal Master Settings*
    f. Type in the **Caption**: *bLoyal Master Settings*
    g. Click the **Close** button.
    h. **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 <u>and</u> 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** = *Custom Action*
3. **Caption** = *bLoyal Void Current Ticket*
4. **Custom Action** = *bLoyal Void Current Ticket*

2nd Button: Void Current Ticket Function
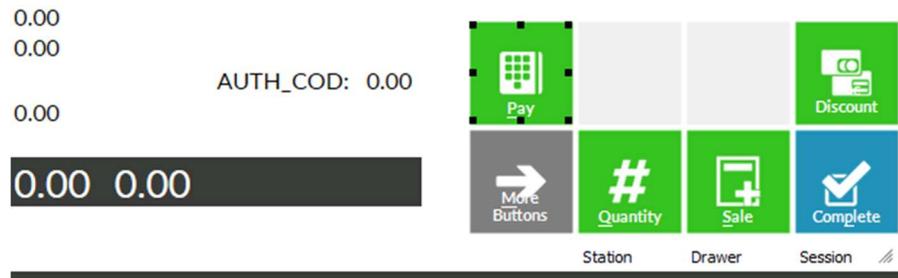1. Select 2nd button.
2. **Action** = *Void current ticket*

***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. Click the **Close** button.
7. **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: bLoyal Pre-Tender Function
1. Select 1st button.
2. **Action** = *Custom Action*
3. **Caption** = *bLoyal Pre-Tender*
4. **Custom Action** = *bLoyal Pretender*

2nd Button: Pay Codes
1. Select 2nd 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 bLoyal Run Page Buttons

These buttons require a Run Page because an Item needs to be added to the Ticket before our Connector runs. This allows the Counterpoint Ticket to perform a Hold and Recall that will move data from Counterpoint's tables into our bLoyal tables.

These buttons are a Run Page:
- *bLoyal find Customer*
  - *This required button allows customer search, selection, and creation. Also displays some high-level customer info.*
- *bLoyal Quick Signup*
  - *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**.*

Below are steps on how to create a Run Page with one of these buttons.

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 or 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 the product with code "BLOYALTEMP". This item gets automatically created when you install the bLoyal Backoffice for Counterpoint and click the "Add bLoyal Configuration" button. (This product can be changed to any product, but if it is changed, you will need to update the bLoyal Master Settings)
4. Set *Default qty* = 0.

2nd Button: bLoyal Function
1. Select 2nd button.
2. **Action** = *Custom Action*
3. **Caption** = *bLoyal Find Customer or Quick Sign up*
4. **Custom Action** = bLoyal *Find Customer or Quick Sign up*
5. Click **Close** button.
6. **Save** the settings on the Touchscreen Code window (floppy disk icon).

***bLoyal* Button**
1. Now, select your where you would like to set this button. (Main Menu or a Custom bLoyal Button Page)
2. Select a blank button that you would like to set up as your **bLoyal** button.
3. **Caption** = *bLoyal Find Customer or bLoyal Quick Signup*

4. **Action** = *Run page*
5. **Run page** = *bLoyal Find Customer or bLoyal Quick Signup*
6. Click the **Close** button.
7. **Save** the settings on the Touchscreen Code window (floppy disk icon).

4.6 bLoyal Custom Action Buttons

These bLoyal Buttons are Custom Actions that will be dynamically added to your Custom Actions Dropdown when the bLoyal Backoffice for Counterpoint's "Add bLoyal configuration" button is clicked. These Buttons can be added to a Custom bLoyal Buttons Page or directly to the main menu.

These buttons are a Custom Action Button:
- *bLoyal Apply Coupon*
  - o *Use to view and apply coupons powered by bLoyal.*

- *bLoyal View Customer*
  - o *View/edit all customer information with this required button.*

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

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

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

- *bLoyal Preview Discount*
  - o 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.

- *bLoyal Exclude Discount*
  - o *You may optionally add this button to give staff the ability to manually exclude discounts.*

Below is an example of how to add one of the Buttons.

1ˢᵗ Button: bLoyal *Custom Action*
1. Navigate to where you would like your button added. (Main Menu or a created bLoyal Buttons Page)
1. Select any button.
2. **Action** = *Custom Action*
3. **Custom Action** = *Any of the above Custom Actions*
4. **Caption** = {Name of Selected bLoyal Custom Action}
5. Click **Close** button.
6. **Save** the settings on the Touchscreen Code window (floppy disk icon).

Repeat these steps for each button you would like to add.

4.7 bLoyal Tender Buttons

In order to use bLoyal Gift Cards and bLoyal Loyalty Currency, a bLoyal Gift Card and bLoyal Loyalty Button needs to be added to the Native Counterpoint PayCodes Page. (In order to use these buttons, a Counterpoint Paycode with the same code as a bLoyal Tender Code needs to be added. This Paycode needs to also be set in the bLoyal Master Settings)

bLoyal Custom Action Tender Buttons:
- bLoyal Gift Card
    - *Use to redeem gift cards powered by bLoyal. You may also check gift card balances.*

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

Below is an example of how to add one of the Buttons.

Navigate to the PayCodes 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 **Page** and pick the Paycodes Page.

1st Button: *bLoyal Tender Button*
1. Select an empty button.
2. **Action** = *Custom Action*
3. **Custom Action** = {Name of Selected bLoyal Custom Action}
4. **Caption** = *bLoyal Gift Card or bLoyal Loyalty*
5. Click **Close** button.
6. **Save** the settings on the Touchscreen Code window (floppy disk icon).

Repeat these steps for the other Tender button.

4.8 QuickLink Button

bLoyal QuickLink is an optional home page-style POS Snippet with a collection of bLoyal functions such as Find Customer, View Customer, and so forth. This unique button can needs to be a run page as it contains Find Customer functionality.

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: Add Item Function
1. Select 1ˢᵗ button at the right side of the screen (top-leftmost button).
2. **Action** = *Item*
3. Select the product with code "BLOYALTEMP". This item gets automatically created when you install the bLoyal Backoffice for Counterpoint and click the "Add bLoyal Configuration" button. (This product can be changed to any product, but if it is changed, you will need to update the bLoyal Master Settings)
4. Set *Default qty* = 0.

2ⁿᵈ Button: *bLoyal QuickLink* Function
1. Select 2ⁿᵈ button.
2. **Action** = *Custom Action*
3. **Caption** = *bLoyal QuickLink*
4. **Custom Action** = bLoyal *Quicklink*
5. Click **Close** button.
6. **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. Click the **Close** button.
7. **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.

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 *Hold and recall* new tickets. This is automatically stripped from transactions by the bLoyal stored procedures. By default a product is auto created with a code of BLOYALTEMP.
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 *Hold and recall* button. Ex.: If you had set *Hold and* recall to the F7 key, you would enter *F7.*
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: *LOYALTY*
bLoyal Gift Card Tender Code	The bLoyal team will set up your Gift Card tender code in Director. Default: *GIFTCARD*
Hide Pre-Tender Screen	Optionally hide the *Preview Discount* pop-up window which displays the loyalty to be accrued/redeemed and/or discounts to occur in the current transaction when clicking the *Pay* 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: *(local), local,* and *localhost* will not work.
Database Name*	This is the name of your NCR Counterpoint store database.
Authentication*	Type of database authentication to be selected. Usually *SQL Server Authentication* 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:
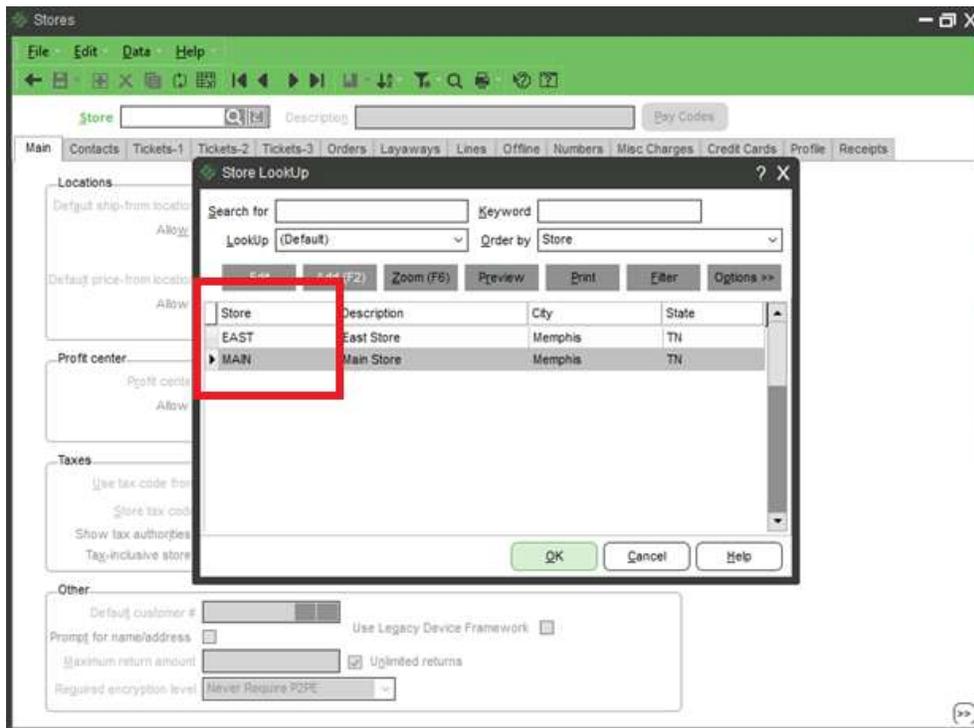
1. Login to bLoyal Director with valid credentials and click on **Channels => Stores.**

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:

1. Login to bLoyal Director with valid credentials and click on **Channels => Devices.**

2. 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*

3. 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):