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Introduction

You’ve invested a significant amount of time, money, and hard work in your computer systems and in CounterPoint. The CounterPoint Subscription Service (CSS) is the best way to protect that investment and get the most out of CounterPoint. CSS ensures that you can take advantage of the latest features and enhancements in each new version of CounterPoint as soon as it is released.

The CounterPoint Update Guide includes detailed instructions for updating your system from V7.5.13 or later to the current version. For information about the new features in the current version of CounterPoint, refer to the current Release Notes in the CounterPoint Electronic Documentation.

NOTE: This guide is intended for existing CounterPoint systems. If you are installing a new CounterPoint system, refer to the CounterPoint Installation Guide in the CounterPoint Electronic Documentation.
Software updates

As a registered CSS subscriber, you have the option of receiving each new version of CounterPoint on CD or downloading it from the CounterPoint website. When you receive or download a new version, however, it does not necessarily include the latest corrections and updates. The steps outlined in this book include downloading and installing the current CounterPoint Service Pack.

CounterPoint Service Packs contain the latest software updates and enhancements. You can obtain the current CounterPoint Service Pack from the Support area of the CounterPoint website at www.counterpointpos.com/support/software_cpv7.htm. Instructions for installing the Service Pack are available on the website.

NOTE: You must be a registered CSS subscriber to access the Support area of the CounterPoint website and download Service Packs.

The CounterPoint Service Pack is updated as often as updates become available. You should periodically download the appropriate Service Pack for your operating system to ensure that you are running the latest software.

Each Service Pack includes the Service Pack Log and the Reported Problem Log. The Service Pack Log describes enhancements and corrections in the Service Pack, while the Reported Problem Log documents reported problems in the current software. We encourage you to install all Service Packs, regardless of whether the Service Pack Log includes anything that seems to be of interest to you.

You can receive automatic email notifications of new Service Packs by subscribing to our Service Pack list. To subscribe to the list, visit our website at www.counterpointpos.com/support/software_email.htm.

Service Packs may contain revised or supplemental documentation, which will be listed in the Release Notes: CounterPoint Service Pack document in the CounterPoint Electronic Documentation.

You can use System > Utilities > Environment to display your current version of CounterPoint and any Service Packs that have been installed.
Getting started

New features
To learn more about the new features that are available in V7.5.18, refer to the current Release Notes in the CounterPoint Electronic Documentation.

Updating from V7.5.13 or later
To update from CounterPoint V7.5.13 or later to V7.5.18, complete the steps outlined in Updating to V7.5.18, starting on page 8.

Updating from V7.5.12 or earlier
To update CounterPoint V7.5.12 or earlier to V7.5.18, complete the steps outlined in Updating from V7.5.12 or earlier in the CounterPoint Electronic Documentation.

Changing operating systems
If you are updating a previous version of CounterPoint and you would like to change operating systems, you must first update your existing system, and then move your CounterPoint data to your new system, to ensure data integrity.

For example, if you are currently running an earlier version of CounterPoint in a Unix environment and you want to migrate to Windows, update the version of CounterPoint on your existing system to V7.5.18 by following the steps in this book.

Next, complete the steps in the CounterPoint Installation Guide to install CounterPoint on your Windows system.

Finally, use File Utilities > Automatic in CounterPoint to Export all data from your Unix system, copy the export file to your Windows system, and then use File Utilities > Automatic to Restore the data.
Updating to V7.5.18

To update CounterPoint V7.5.13 or later to V7.5.18, complete the Pre-installation steps, Installation steps, and Post-installation steps outlined in this section.

To update CounterPoint V7.5.12 or earlier to V7.5.18, follow the instructions outlined in Updating from V7.5.12 or earlier in the CounterPoint Electronic Documentation. You should print this document to refer to during the update process.

Radiant Systems no longer provides support for Pervasive.SQL 2000i (or 2000). While you may not experience any problems using Pervasive.SQL 2000i or 2000 (with Service Pack 2), we strongly recommend that you upgrade to Pervasive PSQL v10.

If you are using Pervasive.SQL V8.6 or PSQL v9, you can continue to do so, as they are stable and reliable database platforms that are fully compatible with CounterPoint V7.5.18. However, you may purchase an upgrade to Pervasive.SQL v10, if you wish.

NOTE: Pervasive v10 is not compatible with Netware.

Refer to Upgrading Pervasive.SQL in the CounterPoint Electronic Documentation for more information about upgrading to Pervasive PSQL v10.
Pre-installation steps

Before you update to V7.5.18, complete the following steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Move demo data</td>
</tr>
<tr>
<td>Step 2</td>
<td>Update Multi-Site</td>
</tr>
<tr>
<td>Step 3</td>
<td>Post cash receipt transactions</td>
</tr>
</tbody>
</table>

Step 1 – Move demo data

If you are using demo companies and want to save your demo data, you can move the demo companies to other directories before you install CounterPoint V7.5.18.

Existing data files are not affected by the CounterPoint installation, with the exception of demo data files for DEMO1 and DEMO2. If you install these demo companies, or if you are installing on a Unix system, any existing data for these companies will be overwritten. No other companies will be affected.

Step 2 – Update Multi-Site

If you are using Multi-Site, review Updating Multi-Site installations on page 20. You can temporarily use V7.5.18 at the Hub and your previous version of CounterPoint at the Satellites, provided you do not implement any of the new features until all sites are updated.

Step 3 – Post cash receipt transactions

If you are using the Receivables Option and you have unposted cash receipts transactions on file, post those transactions using Customers > Cash receipts > Post.
Installation steps

To update your CounterPoint software to V7.5.18, perform the appropriate installation steps for your operating environment.

Standalone computer

If you are updating CounterPoint on a standalone Windows system, complete the following steps:

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Update CounterPoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>Install the current Service Pack</td>
</tr>
<tr>
<td>Step 3</td>
<td>Update permanent activation key</td>
</tr>
</tbody>
</table>

Step 1 – Update CounterPoint

1. Insert the CounterPoint V7.5.18 CD into your CD-ROM drive to display the CounterPoint launch menu, click Install, and then click CounterPoint V7.
   
   OR
   
   Download 7518WindowsUpdate.exe from the CounterPoint website at www.counterpointpos.com/support/downloads_cpv7.htm, and then double-click the file to extract the necessary components and start the CounterPoint installer.
   
   OR
   
   You may download the 7518Complete.exe file from www.counterpointpos.com/support/downloads_cpv7.htm to obtain the complete V7.5.18 CD, extract the archive, and then double-click launch.exe to start the CounterPoint installer.
   
   **NOTE:** Before proceeding with the installation, make sure you have the Permanent Activation Key issued to you by Radiant Systems.

2. Follow the on-screen instructions to install CounterPoint V7.5.18.

   If the CounterPoint 7.5 Setup program does not detect Perfect Keyboard, Adobe Reader, or BLAST Data Pump, you may be prompted to install them during this process. Do not restart your computer if you are prompted to do so after each installation.
Step 2 – Install the current Service Pack

Install the current CounterPoint Service Pack to obtain the latest software updates and enhancements. You can download the current Service Pack from the Support area of the CounterPoint website at www.counterpointpos.com/support/software_cpv7.htm.

NOTE: You must be a registered CSS subscriber to access the Support area of the CounterPoint website and download Service Packs.

Step 3 – Update permanent activation key

As a registered CSS subscriber, you are issued a new CounterPoint Permanent Activation Key with each release. You must register V7.5.18 by updating your Permanent key in System > Registration.

NOTE: If you do not enter your new key, CounterPoint will only function in demonstration mode.
Windows or NetWare network

If you are updating CounterPoint on a Windows XP/2000 or NetWare network, complete the following steps:

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Update CounterPoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>Install the current Service Pack</td>
</tr>
<tr>
<td>Step 3</td>
<td>Update permanent activation key</td>
</tr>
<tr>
<td>Step 4</td>
<td>Update the workstations</td>
</tr>
</tbody>
</table>

Step 1 – Update CounterPoint

1. Make sure that no one is currently logged in to CounterPoint.

2. Insert the CounterPoint V7.5.18 CD into your server or a workstation connected to your server to display the launch menu, click Install, and then click CounterPoint Version 7.5.

   OR

   Download 7518WindowsUpdate.exe from the CounterPoint website at www.counterpointpos.com/support/downloads_cpv7.htm, and then double-click the file to extract the necessary components and start the CounterPoint installer.

   OR

   You may download the 7518Complete.exe file from www.counterpointpos.com/support/downloads_cpv7.htm to obtain the complete V7.5.18 CD, extract the archive, and then double-click launch.exe to start the CounterPoint installer.

3. Follow the on-screen instructions to install CounterPoint.

   If the CounterPoint 7.5 Setup program does not detect Perfect Keyboard, Adobe Reader, or BLAST Data Pump, you may be prompted to install them during this process. Do not restart your computer if you are prompted to do so after each installation.

4. If you updated CounterPoint from CD, click Install from the launch menu to copy updated workstation files to your network.
Step 2 – Install the current Service Pack

Install the current CounterPoint Service Pack to obtain the latest software updates and enhancements. You can download the current Service Pack from the Support area of the CounterPoint website at www.counterpointpos.com/support/software_cpv7.htm.

**NOTE:** You must be a registered CSS subscriber to access the Support area of the CounterPoint website and download Service Packs.

Step 3 – Update permanent activation key

As a registered CSS subscriber, you are issued a new CounterPoint Permanent Activation Key with each release. You must register V7.5.18 by updating your Permanent key in System > Registration.

**NOTE:** If you do not enter your new key, CounterPoint will only function in demonstration mode.

Step 4 – Update the workstations

To update CounterPoint on each workstation, do the following:

1. From each workstation, browse to the drive you mapped to the top-level directory, and then double-click CPWRKSET.EXE to start the CounterPoint 7.5 Workstation Setup program.

2. Follow the on-screen instructions to install the necessary CounterPoint workstation files.

   If the CounterPoint 7.5 Workstation Setup program does not detect Perfect Keyboard, Adobe Reader or BLAST Data Pump, you may be prompted to install them during this process. Do not restart your computer if you are prompted to do so after each installation.
Unix/Linux

If you are updating CounterPoint on a Unix/Linux system, follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Update CounterPoint</td>
</tr>
<tr>
<td>2</td>
<td>Install the current Service Pack</td>
</tr>
<tr>
<td>3</td>
<td>Update permanent activation key</td>
</tr>
</tbody>
</table>

**Step 1 – Update CounterPoint**

1. Make sure that no one is logged in to CounterPoint.
2. If you do not have a CounterPoint V7.5.18 CD, download the 7518UnixUpdate.zip archive from the CounterPoint website at www.counterpointpos.com/support/downloads_cpv7.htm, and then write the files in the archive to a CD.
3. Mount your CD and change directories to the mount point. Typically, these commands are:

<table>
<thead>
<tr>
<th>Operating system</th>
<th>Command</th>
</tr>
</thead>
</table>
| Open Server      | mount /dev/cd0 /mnt  
                      cd /mnt       |
| Linux            | mount /dev/cdrom /mnt  
                      cd /mnt       |

4. Run the install script by typing one of the following commands, and then follow the on-screen prompts to choose the installation directory.

<table>
<thead>
<tr>
<th>Operating system</th>
<th>Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Server &amp; Linux</td>
<td>sh INSTALL.SH</td>
</tr>
</tbody>
</table>

5. When installation is complete, change to a different directory to unmount the CD. Typically, the command is:

   umount /mnt
Step 2 – Install the current Service Pack

Install the current CounterPoint Service Pack to obtain the latest software updates and enhancements. You can download the current Service Pack from the Support area of the CounterPoint website at www.counterpointpos.com/support/software_cpv7.htm.

**NOTE:** You must be a registered CSS subscriber to access the Support area of the CounterPoint website and download Service Packs.

Step 3 – Update permanent activation key

As a registered CSS subscriber, you are issued a new CounterPoint Permanent Activation Key with each release. You must register V7.5.18 by updating your Permanent key in System > Registration.

**NOTE:** If you do not enter your new key, CounterPoint will only function in demonstration mode.

Citrix

If you are using a Citrix WAN, follow the Windows or NetWare network steps, starting on page 12, to update CounterPoint on your network server and install the latest CounterPoint workstation files on your Citrix server.

Windows Terminal Services

If you are using a Windows Terminal Services WAN, follow the Windows or NetWare network steps, starting on page 12, to update CounterPoint on your network server and install the latest CounterPoint workstation files on your Terminal Services server.
Post-installation steps

After you update CounterPoint to V7.5.18 on your system, complete these steps for each of your companies:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Update password settings &amp; passwords</td>
</tr>
<tr>
<td>Step 2</td>
<td>Create new data files</td>
</tr>
<tr>
<td>Step 3</td>
<td>Update pre-defined data</td>
</tr>
<tr>
<td>Step 4</td>
<td>Update CounterPoint version in CPOnline</td>
</tr>
<tr>
<td>Step 5</td>
<td>Update menu definitions</td>
</tr>
<tr>
<td>Step 6</td>
<td>Initialize cash receipts transaction file (V7.5.14 or earlier)</td>
</tr>
<tr>
<td>Step 7</td>
<td>Rebuild inventory summary data (V7.5.14 or earlier)</td>
</tr>
</tbody>
</table>

Step 1 – Update password settings & passwords

In this version, the use of PCI DSS-compliant passwords is no longer optional for merchants who process credit cards. All users must log in to CounterPoint with a unique password that meets the minimum PCI DSS requirements for password length and complexity.

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.

If you did not previously require passwords or your password settings did not meet the minimum PCI DSS requirements, the first time you start CounterPoint after you update to V7.5.18, the following message appears:

```
CounterPoint is not using PCI DSS compliant passwords.
You can upgrade the password settings or exit CounterPoint.
Do you want to upgrade the settings? [Y] [N]
```

Select Yes and press Enter to automatically configure CounterPoint to require passwords and/or update your password settings to meet the minimum PCI DSS requirements.
When the update is complete, press ESC to quit CounterPoint, and then restart CounterPoint. You will be prompted to create a new password or change your password to comply with the new password settings. Your new password must be at least seven characters in length and must include letters and numbers.

**NOTE:** Refer to the [PCI DSS Compliance Guide](#) for more information about PCI DSS-compliant password settings.

Also, the next time each user logs in to CounterPoint, the user will be prompted to create a new password or change his or her password to comply with the new password settings.

**Step 2 – Create new data files**

Initialize new data files using File utilities > Automatic. Specify All applications, and select Optional initialize.

**Step 3 – Update pre-defined data**

Update pre-defined data using File utilities > Special > System > Update pre-defined data.

**WARNING!** If you have modified any of the standard forms without renaming them, they will be overwritten when you update pre-defined data.

**Step 4 – Update CounterPoint version in CPOnline**

If you have a CPOnline store, update the CounterPoint version associated with your CPOnline store. You will not be able to transfer information between CounterPoint V7.5.18 and CPOnline until you make this change to your CPOnline store configuration.

Follow these steps to revise the version of CounterPoint associated with your CPOnline store:

1. Access your CPOnline Store Management website using your Web browser, and then select Configuration > Setup > Store Setup.
2. Select the appropriate version of CounterPoint and click Save.
Step 5 – Update menu definitions

If you have defined any custom menu definitions, update them using Setup > System > Menu definitions to include any new CounterPoint menu items that you want to allow your users to access.

The following menu items have been added to CounterPoint V7.5.18:

• Inventory > View > Prices
• Customers > Utilities > Group customer changes

NOTE: This menu item was added in a V7.5.17 Service Pack.

• Files Utilities > Special > System > Renumber users

STOP HERE if you are updating from V7.5.15, V7.5.16, or V7.5.17.

Your CounterPoint system is now updated to V7.5.18!

Refer to the current CounterPoint Release Notes for information about the new features in CounterPoint V7.5.18.

If you are updating from V7.5.14 or earlier, proceed to the next post-installation step.

Step 6 – Initialize cash receipts transaction file (V7.5.14 or earlier)

If you are using the Receivables Option, you must initialize the cash receipts transaction file after you update to V7.5.18.

Follow these steps to initialize the cash receipts transaction file:

1. Select File Utilities > Customers, and then enter 4 to Initialize files.
2. Select Yes for the Cash receipts trx file and No for all other files.
3. Press Enter at the Field number to change ? prompt to initialize the cash receipts transaction file. A message appears to alert you when the initialization process is complete.
4. Press ESC to return to the main menu.

NOTE: If you are updating a Multi-Site system, you must initialize the cash receipts transaction file at the Hub and at each Satellite.
Step 7 – Rebuild inventory summary data (V7.5.14 or earlier)

If you have inventory summary data on file, rebuild your inventory summary data, using the Build inventory summary utility (Inventory > Utilities > Build inventory summary), after updating to V7.5.18.

Your history summary will be inaccurate until you complete this step.

**NOTE:** You should not rebuild inventory summary data if you would prefer to retain your current inventory summary files and you are not using history summary (or you are not concerned about the accuracy of your history summary).
Updating Multi-Site installations

As a general rule, you should **NOT** use different versions of CounterPoint at the Hub and Satellites. This is the safest approach. However, we realize this approach is not practical in most cases. If you need to mix software versions at the Hub and Satellites, follow the guidelines in this section to update a Multi-Site installation to V7.5.18.

You **MUST** update the Hub to V7.5.18 before you update the Satellites.

If possible, delay using new features in the software until you have updated all of the Satellite sites. Although a non-updated Satellite should ignore new fields and new files that it is not aware of, the safest approach is to avoid all use of new features until all Satellites have been updated.

Refer to the Generating the script files section of Multi-Site Scripts in the CounterPoint Electronic Documentation for detailed instructions for re-generating scripts and copying them to Satellites.

Updating the Hub

Complete these steps to update the Hub to V7.5.18 **before** you update the Satellites:

**Step 1 – Complete overnight processing**

Complete all overnight processing and stop polling services prior to performing the update.

**Step 2 – Disable transmission of user data (V7.5.9 or earlier)**

If you are updating from V7.5.9 or earlier, disable the transmission of user data until you have updated all of your Satellites to V7.5.18. To do this, select Setup > Multi-Site > Control, edit the Users field, and then select No from Xmit To-Sat and Xmit To-Hub.

When all of your Satellites are updated to V7.5.18, re-enable the transmission of Users in Setup > Multi-Site > Control.

**Step 3 – Install CounterPoint**

Install CounterPoint V7.5.18 at the Hub.
Updating the Satellites

After you have updated the Hub, you can continue processing normally. Because the Satellite is not producing any new files or data fields, the Hub will not encounter any problems importing the transmission files. Similarly, the Satellite will not encounter any problems importing the Hub transmission file because it is not expecting any new files that may be included.

However, you should install CounterPoint V7.5.18 on each Satellite at your earliest convenience to ensure that the Hub and Satellites are running the same version.

**NOTE:** If you are updating from V7.5.9 or earlier, make sure you re-enable the transmission of Users in Setup > Multi-Site > Control after you update all of your Satellites to V7.5.18.