

Version 6.36.4 – Everest Standard

Customer Release Notes

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1. Release Overview

Everest Standard Update V6.36.4 has 39 Bug Fixes.

- **Release Version** Everest Standard V6.36.4

- **Release Date** April 8, 2015

- **Release Type** General Availability

- **Deliverables**
 - Product Release Software (installer zip uploaded to FTP)
 - Release Documentation (Release Notes)

- **Any other information**
 - Implementation directions for PA-DSS features included in this and previous Version System Requirements documentation

2. Everest 6.X Minimum System Requirements

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System Requirements: Workstation Recommendations	Everest Standard
Processor	Intel/AMD 64bit CPU
System Memory	3GB
Hard Drive	Free Hard Disk Space - 40GB
Operating System	Windows 7 64-bit
Video Card	DirectX 9 graphics device with WDDM 1.0 or higher driver

Processor - Pentium 4 or higher with Support of AMD/ EMT64 (for 64 bit operating system)

System Requirements: Server Recommendations	
Operating system	Windows 2008 SP2 x64 or R2
Database Software	MS SQL Server 2008 R2 x 64 Express (Standard recommended)

Memory	16GB
Processor	Intel/AMD 64bit CPU dual core or more
Primary Hard Drive	Free HD space, min 40GB yet dependent on DB capacity
Network Adapters	GB Ethernet NIC

Any questions that there may be for Everest Standard V6 should be directed to Customer Support at support@versata.com

Windows Small Business Server is not supported.

3. Third Party Software Supported

- True Commerce EDI Solutions; TrueCommerce Transaction Manager
- Tax Forms for Payroll
- PayFlow Pro
- Paymover
- CRM Studios V8
- Starship V12.1
- Crystal Reports V14
- Verifone PAYware
- Symmetry Tax Engine

4. Summary of V6.X New Features by Release

Key	ZendeskID	Summary	Release Notes Description	Release
EVCID-1078		Each user of Everest must have a valid email		6.3
EVCID-1075	201125	Password Setup Requirements		6.3
EVCID-1065	201125	Administrative function for Users in Everest		6.3

EVCID-1064	201125	Sensitive Data Debugging Questionnaire		6.3
EVCID-1063	201125	Security of Web-Based Applications Questionnaire		6.3
EVCID-1062	201125	Security of Network Questionnaire		6.3
EVCID-1059	201125	Application Activity Logging Questionnaire		6.3
EVCID-1041	201125	Change of SUP user upon first login		6.3

EVCID-1036	201125	Collection, storage and disposal of vulnerable customer data - verification		6.3
EVCID-1024	201125	Increase password security by requiring users to change passwords on a regular basis		6.3
EVCID-1023	201125	Increase password security be creation of password requirements		6.3
EVCID-1060	201129	Encryption Key security and use questionnaire		6.3
EVCID-1074	201129	Web based Encryption Questionnaire		6.3

EVCID-1073	201129	Administrative logging is required when sensitive data is accessed		6.3
EVCID-1075		Password Setup Requirements	Due to a bug, do not set the Minimum Password Length to a value GREATER THAN 10. This will be corrected in an upcoming release.	6.4
EVCID-1023		Increase password security by creation of complex password requirements	In order to move towards PA-DSS compliance, the requirement for passwords in Everest have changed. Currently this refers just to EVEREST Client, but will include eSF users in an upcoming release. Please read the instructions in the Release Announcement for instructions and also for bugs in this change.	6.4
EVCID-1041		Bug Fix Change of SUP user upon first login	Please see the attached instructions for how to implement this new functionality.	6.4

EVCID-1078		Bug Fix Each user of Everest must have a valid email	On login, if a user does not have a valid email address, they will be prompted to create one. This is to allow for implementation of PA-DSS password requirements.	6.4
EVCID-1065		Bug Fix Administrative functions for Users in Everest	This function has fixed accessibility of administrative functionality to Everest that should have been accessible only to those with administrative access. Please see the list attached for these areas.	6.4
EVCID-1065		Bug Fix Administrative functions for Users in Everest	This function has fixed accessibility of administrative functionality to Everest that should have been accessible only to those with administrative access. Please see the list attached for these areas.	6.4
EVCID-1330		Credit card number in credit card browser is not encrypted	When in the window in the customers browser for individual customers credit card information, the number is not encrypted, or masked, it can be copied and pasted on a document and all information is shown. This must change to the number being encrypted.	6.6
EVCID-1393		The maximum allowed number of characters accepted by Everest for passwords is 10, yet the minimum value can be set above this	The number of characters allowable for a password was being truncated at 10, no matter what the setting was.	6.7

EVCID-1378		Functionality for "Password Setup" EVCID-1075 is not there for Number of Recent Passwords that are Restricted"		6.7
EVCID-1414		Password requirements do not apply to Everest Customers/Estorefront Customers		6.7
EVCID-1336		The latest version of CRM Studios (8) should be tested to determine if it will work with Everest (6.3)		6.8
EVCID-1475		Everest must allow administrators to purge/delete all cardholder data from their database: ONCE PURGED, do not click on old credit card information: Although the credit card number is purged, all other information is still there. An error is generated if you try to access it.		6.8
EVCID-1836	29315	Test Starship V12.0 with the latest V6.X of Everest		6.9

EVCID-1674	20105	Re: Running Everest without administrator privileges		6.9
-		Everest application is installed by Windows Administrator, and then Windows Administrator creates new standard users to use the same machine by Terminal session. When new standard user login to that machine and tries to run the application, application gives error 'Registration of Libraries Failed' and closes abnormally.	Everest application is installed by Windows Administrator, and then Windows Administrator creates new standard users to use the same machine by Terminal session. When new standard user login to that machine and tries to run the application, application gives error 'Registration of Libraries Failed' and closes abnormally. Furthermore, if Administrator changes the account type of standard user to administrator, and then that user tries to run the application, application runs smoothly without any error. If Administrator even reverts the account type of that user to normal standard user, application run smoothly without any error.	6.9
EVCID-1751		Password Requirement to add customers	This will remove the requirement for customers that do not have a web shop to have a password.	6.10

EVCID-1212		Use and encryption of secret answer to secret question	For security, the customer answer to their secret question for retrieving a password is stored in an encrypted form in the database.	6.11
EVCID-2261		Improve credit card number masking		6.11
EVCID-1212		Use of encryption of secret answer to secret questions	When password is lost it does not ask for Secret answer. The answer is encrypted in the database.	6.11
EVCID-2036	27328	Web password is now a required field for customer profile, some customers don't use the web store, they should have a switch to make web password optional, when this user makes a change to customer profile, they need to create a password that isn't needed.		6.11
EVCID-939	11746	E-commerce - how to manage credit card	Customer should be provided with option to enter credit card details when he opens "Manage Credit Cards"	6.13

EVCID-1192	14750	PayPal Checkout Button and Everest Invoice	This is a new feature request: Customer seeking various alterations to the PayPal integration to bring the process more in line with the recommended process flow.	6.13
EVCID-1212		Use of encryption of secret answer to secret questions	When password is lost it does not ask for Secret answer. The answer is encrypted in the database.	6.13
EVCID-1228		PA-DSS Protected stored cardholder data		6.13
EVCID-2055	28401	Need time added back to Sales Document History tab		6.14
EVCID-2229	32427	how to increase the decimal places on weight values	Assembly setup allows 5 decimal places, work orders allow only 4.	6.14

EVCID-2074		Cannot copy serial numbers in PO / PR		6.14
EVCID-2491		Sending a Credit Card transaction without AVS/CVV Pre-authorization		6.15
EVCID-2262		Verifone PAYware Connect Payment Processor	Verifone PAYware is a tokenization payment processor. With selection of this as your processor, you remove the necessity to store customer credit card information in Everest. Verifone - if batch payment processing is enabled, encrypted credit card info will still be kept in the DB. Please see appendix for details. Prior to using Verifone, please purge all credit card data with UTILITY=>PURGE=>CREDIT CARD If you experience any issues, please let us know as soon as possible so that it can be resolved.	6.11
EVCID-2821	74614	Purge credit card additional options	Requested functionality is to add some additional options so that old and expired credit cards can be safely purged from the system. Particularly option to: - Delete credit cards that have expired (based on expiration date), - Delete discontinued cards	6.22

EVCID-1358	19820	cash drawers would not pop open when taking payments on sales invoices if they were not created in POS	Sales documents will be able to be converted to POS documents.	6.22
EVCID-1284		Upgrade from Delphi 2006 to Delphi XE2	Complete rewrite and upgrade of third party components	6.24
EVCID-3043	71798	Documentation on Reconciliation issue from 6/13/13 conference call	The web transaction's payment from batch payment is not considered by POS-X and POS-Z report thus there's a discrepancy, the Idea behind these flow are there should be option for Web Transaction to be considered as part of the POS transaction	6.25
EVCID-3069	83067	BAM not working with SSL e-mail (66827)	There is no setting for SSL and TLS. Since most of the ISPs are only supporting smtp based on SSL/TLS encryption including Google Services, Customer have no other choice than to move to SSL/TLS. Everest does not have option to configure SSL/TLS encryption in Email Account profile.	6.25
EVCID-2856		Create an Archive functionality in Everest to minimize DB size to what is needed.	As an example, to archive sales orders, users select sales order as a document type, provide the date range for documents to be archived and click 'Archive'. Users can archive the following document types: • Sales Opportunities, • Sales Quotes, • Credit Quotes, • Purchase Quotes, • Debit Quotes, • Sales Orders, • Sales Invoices, • Credit	6.29

			Orders, • Credit Memos, • Purchase Orders, • Purchase Receipts, • Purchase Invoices, • Debit Orders, • Debit Memos, • Credit Card, • Freight Zones, • Freight Rates, • Event History	
EVCID-3570		eCommerce Connector - process order info coming from Magento	The core of the Everest eCommerce Connector is the Connector Service (later Connector) which is the windows service application. It responsible for listening events from both sides - Everest system and eCommerce solution. The events include orders submission at eCommerce side, items modifications at Everest side and similar. Upon receiving an event the Connector do needed tasks to keep eCommerce solution with Everest system synchronized.	6.35

5. Summary of Fixed Customer Reported Issues

Everest Standard Edition V6.36.4 has 39 fixes. Of these 10 are customer reported issues (ones with Zendesk ID) and 29 internally reported issues.

Fixes for V6.36.4			
Key	Summary	Zendesk ID	Release Notes
EVCID-3204	6.16 Item Stock Status Screen does not pull up correct documents	88059	Pending Purchase Order for Item now displays records for specific locations only depending on the choice from stock status window.
EVCID-3266	Error occurs when canceling printing of a label		Cancelling printing of a label no longer displays an error.
EVCID-3346	Re: Re: Cant bring up field chooser for items browser (merged from LBP2015-02)		Field Chooser is now displayed when user clicks the option from the toolbar or menu options.
EVCID-3365	Research and delete udoStockAreaGroups.pas and uboStockAreaGroups.pas		udoStockAreaGroups.pas and uboStockAreaGroups.pas are deleted.
EVCID-3395	Cannot setup a separate Everest Reports Server	94394	Report server may be installed now in a separate server without errors.
EVCID-3449	MY SETTIGNS TEMPLATE DONT WORK AFTER UPGRADE	101690	Access violation errors thrown in some browsers are resolved.
EVCID-3473	When changing users at the bottom change users...it keeps that persons main screen look (98189)	107316	A message is displayed when a user does not have a saved interface setting. If a user has a saved interface setting, it will be displayed when changing user or logging into Everest.

EVCID-3474	Stock Transfer screen showing incorrect To Bin	107066	'To Stock Bin' value is applied to each line item when 'To Bin' is empty or for a new line item added to the grid.
EVCID-3509	Issue With Leave Requests	109496	Leave requests may be created now without errors.
EVCID-3523	Re: Performance Issue with Enterprise version (91673)	107281	Performance is improved when committing items in sales orders.
EVCID-3539	Everest 6.29 is sometimes slow (97674)	105002	In micro and medium VM instances, 100k sales orders and sales invoices are loaded in between 2 to 3 minutes. In large VM instances, 100k records load in 1 minute.
EVCID-3545	Compilation error when switching from _STD to _ENT build configs		Compilation error fixed.
EVCID-3558	Search criteria in Advanced Filter is not working compared to v 5.0.2.6 (refer#114870)	115084	Search box is enabled in resulting browser from Advanced Query Builder
EVCID-3559	Scheduled Transactions access denied (refer#114870)	115081	Users with required rights may open Scheduled Transactions browser.
EVCID-3561	Everest freezes when you click Reset to customize toolbar		When user clicks Reset button, an hourglass is displayed while background processes are ongoing.
EVCID-3578	Format installer file name		Installer filenames are now formatted as follows: STD EverestInstallerStd-<VER>-<DATE>-<REV>.zip

			<p>ENT</p> <p>EverestInstallerEnt-<VER>-<DATE>-<REV>.zip</p>
EVCID-3595	Secure channel between Connector and Magento extension		Magento integration now allows secure communication between Magento and Everest eCommerce Connector
EVCID-3596	Everest kicks out user session when a partial payment consisting of cents is entered for certain document.		Partial payments with cents may be entered now in multiple payments.
EVCID-3627	Connector - use cart settings when creating SO		SO created in Everest for Magento order will contain Jurisdiction, Department and shipping item taken from eCommerce preferences
EVCID-3628	Magento - tweak order details during checkout process		Order details presented to customer before they place the order in magento include price, tax, and discounts per item.
EVCID-3633	Unable to post sales journal		Sales journals are posted without errors.
EVCID-3634	Connector - expose API to tweak order details		Connector provides tax and discount for each line item as well as order totals.
EVCID-3635	Magento - process shipment tracking information		Shipment tracking information is sent to Connector to be presented to Magento.
EVCID-3636	Connector - process shipment tracking information		Shipping information is sent to Everest. When sales invoice is created or when shipping information is added or changed, the shipping information is sent to Magento.

EVCID-3637	fire event when shipment tracking list linked to SI is modified		Everest extension sends shipping information when it is changed in the Details tab or Shipment tracking tab in the sales invoice document.
EVCID-3638	EverestMagentoExt - dispatch shipping change info to the Connector		Shipment information changes is sent to Connector service.
EVCID-3640	EverestAPI.Net - partially implement EvShipmentTracking		Implementation of .net version of leoAddress interface
EVCID-3645	Connector - incorrect discount value		Correct discount value is presented in Magento for quantities greater than 1.
EVCID-3669	Magento - only single shipping document created for set of invoices		For each sales invoice created in Everest, an invoice and a shipment document is sent to Magento
EVCID-3670	Magento - make offline/online capture during invoice creation to be an option		In an online capture, authorization is captured at the time the order is placed. When sales invoice is created for the sales order, the credit card is then charged with the amount indicated in the sales invoice.
EVCID-3673	Magento - account for QUOTE and SI extra info		Tracking information and line item prices are sent to Magento to create invoice and shipping documents in Magento.
EVCID-3677	Connector: generate receipt after SI is synchronized		Receipt is created for the sales invoice created in Everest.
EVCID-3678	Magento: send payment details along with the payment details		When invoice and shipping documents are created, amount captured. transaction ID. payment method, and currency are sent

EVCID-3690	Connector: Add simple UI to synchronize categories and items		UI is provided for the Connector so users do not need to manually provide URLs via web browser to synchronize categories and items.
EVCID-3692	App Layer extension - fire stockModified event when PR/PI document created		Stock information is synchronized when purchase receipt and purchase invoice are created.
EVCID-3704	Connector: Incorrect subtotals in order details when quantity pricing is defined for an item		Correct subtotals are displayed for order details in magento when quantity pricing is defined for an item.
EVCID-3705	Magento: Error logged when synchronizing items with quantity pricing		Items with quantity pricing are synchronized without errors.
EVCID-3707	Magento: Amount paid on second invoice is incorrect		Correct amount paid on second invoice is displayed on second invoice for the same sales order.
EVCID-3723	Magento: Unable to set payment method when % markup is set for quantity pricing		Correct order details is shown for items with % markup set for quantity pricing

6. Known Issues

Everest Standard Edition currently has 48 known Severity 1 and 2 issues in development which are customer reported bugs.



Key	Summary	Zendesk ID	Description	Fix Version/s
EVCID-1412	e-mailing invoices as PDF's instead of embedding invoices in e-mail	20804		
EVCID-1491	PA-DSS ISSUE !!!! Forcing users to have valid email addresses creates issues with MailBridge.	22094	Mailbridge should have option to exclude internal users so internal mailing, like password mails are not added to Everest. Now any email sent to the user, including password reset emails, will get added to Everest. Before, we could leave the user's email blank and only customer/vendor emails would get added to Everest. This may open up another PA-DSS issue.	
EVCID-1650	Everest 6.23 is not supporting Dashboard professional	86616	Proessional dashboard installation is failing due to 32/64 bit differences of Windows Server 2008 R2 platform and the previous ones.	V6.39
EVCID-2671	Find Customer	62516	Requested Feature: Giving an option to user how they want to search in Everest which can be set in Everest workstation	

			<p>settings somewhere which provides two options to choose from`</p> <ol style="list-style-type: none">1. Search anywhere : Which is how Everest behaves at the moment2. Search Beginning with: This will search items which begins with searched string For eg searching M-1 from list below only displays items which begins with M-1 ie M-1-NAS and M-1 only <p>BM-1-2 M-1-NAS BM-1-3 CM-1AMC CM-1SAS M-1</p> <p>The purposed setting which defines how search needs to function should be</p>	
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			applied to entire browsers where search is present.	
EVCID-2695	Customization. Company and location displayed.	60568	<p>Customer wants to display Company Name and logged in Location at the top of the Everest window and all other browser windows. At the moment Everest displays following on the main window caption for sample company</p> <p>Everest Advanced Edition - ACCEL SAMPLE COMPANY</p> <p>Customer wants logged in location added there like</p> <p>Everest Advanced Edition - ACCEL SAMPLE COMPANY - California</p> <p>He also wants it to be on all other browsers window something like following on Customer browser for example.</p> <p>Customers - ACCEL SAMPLE COMPANY - California</p> <p>May be it can be provided as a</p>	

			workstation settings/Global settings so that it will be an optional feature and user can set it there if they want it to be like that.	
EVCID-2801	There is no tax_amount token in the Add-Ins to modify the tax amount variable	70826	Token tax_amount or tax_amt is not available for AddIn	
EVCID-2864	When 'SUP' group Disabled, there's no way for custom group to have access to the User Browser	75482	Sometime some user wanted to create their own schema of group and disabled the 'SUP' group, due to it's unlimited access to any kind of activity nature, and now there's no other way for such customized security group to access the user maintenance process.	
EVCID-3010	Cannot locate stock counts in stock count browser unless Get All is selected.	80819	Stock Count Browser does not have search box	
EVCID-3212	CC Info is not getting saved under customer profile (\$10,000 question) Need Immediate attention	89376	Credit Card Info is randomly not getting saved under customer profile for PoS customers	V6.39
EVCID-3228	New Feature Request : Longer Length for Overview under Product Description on .Net website	91653	All text in Web Description should be present in production description page only. More button needs to be removed or	

			this feature should be configurable so that user can chose what they want	
EVCID-3322	Feature request from forum: Inventory turn report	96668	<p>a. Summary: Create a report that shows Inventory turn.</p> <p>b. Customer Requirements: Inventory turn over report - To find slow movers/stale inventory so we can either promote these products or eliminate them.</p> <p>c. Other Considerations: The equation for inventory turnover equals the Cost of goods sold divided by the average inventory-</p>	
EVCID-3330	SO #302601 not labeled as credit limit exceeded	95177	<p>Credit Limit Exceeded message will not show up when creating sales order as per documentation</p> <p>Customer Requirements: As of now the credit limit are defined by the amount on Account Receivable by particular customer, thus a Sales Order which doesn't affect the account receivable amount, would passed the credit limit</p>	

			<p>checking, and only when a journal that related to the account receivable or customer deposits is affected, the checking on the credit status is taken into consideration.</p> <p>Customer would like Everest to check the credit status when creating Sales order, according to them Everest should throw up a prompt on customer credit status.</p>	
EVCID-3338	Bank Reconciliation	97427	<p>Once a reconciliation process was done, it must be able to reprint the report if needed.</p> <p>Other Considerations: The reconciliation process are only updating the transact bank_reco status to 3 and adding new reconciliation record, there's no additional info or links between the Bank_reconciliation table and transact table, need to add another table to give info on one to many linkage from</p>	

			bank_reconciliation to transact for historical information of reconciliation process.	
EVCID-3340	List out of bounds error with Payflow Pro - accepting payments	94206	A warning 'List Index out of bounds(37)' is thrown after processing payment with Payflow Pro Processor	V6.39
EVCID-3400	Bug report: There is a \$0.01 difference when sales tax applies	100655	Sales order is paid in full for deposit, but the generated Sales Invoice still have outstanding balance of a penny	V6.39
EVCID-3413	Unable to update form menu	102004	Customize option is not available for tool bar when Form is not system default and modification made it using Form Designer does not save	V6.39
EVCID-3431	Sales Orders, Invoices not shown weight.	102512	weight on the sales document is not calculated correctly	
EVCID-3436	Printing Report problems	102803	Ent+: Accounts Receivable Aging reports goes to portrait orientation automatically before printing it from print preview dialog	V6.39

EVCID-3443	SDK Case Tool not working	104014	Opening table diagram cause an error on EDM Case Tool	V6.37
EVCID-3478	General Note Sales Order Pop Up	107753	Customer wants Sales documents to be opened in a new window instead of existing window when a document link is clicked from a document task window.	
EVCID-3485	Error when trying to at a sum to the quantity column of stock transfers and quantity adjustments	107376	adding summary column on a saved stock transfer cause the error	V6.39
EVCID-3486	Payment Register -> List Documents Kicks an Error	106934	Opening the Document on payment register throws error	V6.39
EVCID-3490	Can't edit related items on non-inventoried items	108682	Not able to modify Related items in item profile for Non-Inventoried items.	V6.39
EVCID-3491	When exporting browsers to Excel, quantities become formatted as currency.	108497	When records are exported from different browsers like Item, pull sheets, Advanced query to Microsoft Excel file format, quantities are formatted as currency	V6.39
EVCID-3493	Ship Too Address	108379	Ship To' address cannot be modified in website if it has already been used in sales documents	V6.39

EVCID-3511	Foreign Currency Transaction	108456	adding 100% discount on foreign currency returning the discount is higher than the the price	V6.39
EVCID-3531	Wrong Price for EC conversion	111207	Sales Price Decimal accuracy is ignored.	V6.39
EVCID-3538	Printing Multiple Documents	110095	Wrapping lines on item description causes document number and customer details to get duplicated on the next document. This issue exist in both sales order and sales invoices when printed using double line report	V6.39
EVCID-3551	Web Order pricing	112949	When a web order is created, item sell price are formatted with 6 decimal digits in both sales document and report though item sell price accuracy is set for 2 decimal.	V6.39
EVCID-3566	Mark all deposits in Bank Reconciliation	115427	Marking all multiple entries on bank reconciliation doesn't show the check-boxes are marked.	

EVCID-3568	Down arrow causes screen GUI problem	115431	When Down Arrow is pressed after editing a field, all line items disappeared except 2 in a purchase order.	V6.39
EVCID-3569	Bug report # Unable to post journals in 6.34	115449	Posting a document based journal cause error	
EVCID-3597	Sales Tax calculation for Sales Tax Report Rounds everything	115340	Credit Memo tax and sales tax report have different value.	V6.39
EVCID-3632	Can't print W2s for taxes.	117986	Opening W2 Report that contain thousand separator on Box 12 cause error	
EVCID-3644	Wrong Date and not transferring over payment details.	119397	reference date for apply on PI deposit is 1/1/1900	
EVCID-3647	Lot History Error via SI	118621	Lot history is doubled on the invoice when customer address are modified.	V6.39
EVCID-3650	Deleting/removing a line item from sales order takes more than 15 seconds.	116779	Deleting/removing a line item from sales order takes more than 15 seconds.	V6.37
EVCID-3656	item profile	113059	HTML Preview button crashes Everest on windows 7 workstation after applying	

			recent windows updates and no HTML Preview on 2008 R2 server	
EVCID-3660	Lot History	119557	When an Item is using lot tracker, the WO usage for that item when used as a bill of material is not included in the lot history usage	
EVCID-3661	EverestACRM	120747	Some Business Activity Monitoring Events are failing after database compatibility level in Everest is set to 100 recently	V6.39
EVCID-3663	Stock transfers	119815	<p>a. Summary: Stock movement among bin are not detected where this would create confusion when a stock was taken from a bin when the default bin is not available.</p> <p>b. Customer Requirements: a method to trace the stock movement up to bin level.</p> <p>c. Other Considerations: All Sales, Purchase , Bill Of Material, quantity adjustment should be</p>	

			considered. this are already reported before on EVCID-2888	
EVCID-3664	pricing shown *****	118265	Manager level user need to see the cost of an item, but other user are also sees this costs	V6.39
EVCID-3672	Select all not working in batch payment (105945)	121929	Select All does not work on Multiple Payments, Multiple Receipts, Batch Payment Processing > Other window	V6.37
EVCID-3675	Making a PO from SO bring wrong address po-36128	121767	a. Summary: Retrieving Other document's ship to address only retain the first retrieved address. b. Customer Requirements: the address that are retrieved/generated should match with the original address and not just company name c. Other Considerations: currently the generation are only based on the	

			company name where sometime a company have several ship to address.	
EVCID-3676	Unable to run reports after using our Pick Ticket Customization	111833	Report freezes while processing if addin was run prior running report	
EVCID-3702	dates	123710	When a SI is created from SO the apply journal's reference date doesn't point to deposit date but it point to 1/1/1900.	
EVCID-3709	Importing a large batch of manufacturer serial numbers	123629	b. Customer Requirements: when creating Purchase Invoice or Purchase receive document the serialized needs to be imported because there's no pattern on the serial number given by the manufaturer.	
EVCID-3714	Cost Adjustment	119853	Cost Adjustment creates an incorrect average cost calculation when the quantity is 0	

7. Verifone PAYware Connect Payment Processor

7.1 Steps to Obtain a PAYware Connect Account Directly through VeriFone

- Obtain a copy of your VAR merchant setup sheet from your merchant bank.
- Know how many credit card transactions you process monthly. This info can be also obtain by your merchant bank.
- Call Victoria Hartless at: 912-527-4407 or by email: Victoria_H1@verifone.com to obtain a PAYware Connect account.
- State that you need to setup a PAYware Connect account for your POS software “Everest”.
- Provide your processor name (which will be on the VAR sheet that your merchant bank provided you)
- Provide the number of transactions you process monthly.
- Let her know you will be paying the PAYware Connect gateway fees by either credit card or ACH.
- Victoria will then send you a contract to sign.
- Email or Fax your contract to Victoria for your account to be setup.
- Once Victoria has setup the account you will receive an “Activation Email” with your credentials.
- Skip to Step 6
- Should Victoria Hartless not be available or has not responded within 24 hours, you can call VeriFone Inside Sales Team (See #5).
- Call VeriFone Inside Sales Team at: 800-725-9264, Option 1.
- Tell the representative that you need to setup a PAYware Connect account for your POS software “Everest”.
- Provide them with your processor name (which will be on the VAR sheet that your merchant bank provided you)
- Provide them the number of transactions you process monthly.
- Let them know you will be paying the PAYware Connect gateway fees by either credit card or ACH.

- The rep will then send you a contract to sign.
- Email or Fax your contract to the rep for your account to be setup.
- Once the rep has setup the account you will receive an “Activation Email” with your credentials.
- You can contact our PAYware Connect Tech Support team to get the Everest Integration activated as well as obtain any technical assistance. The number to reach them is 800-839-0947.

7.2 PAYware Connect Authorization Networks and Features - VeriFone, Inc.

PA	Cer	B	Cr	Ot	L2	Re	M	D	Disc	Re	F
Chase Paymentech				H		T					
Citi				T							
ECHO				H							
Elavon Host				H		T					
Elavon Terminal (NOVA)				H		T					
First Data Atlanta				H		T					
First Data Nashville ISO				H							
First Data North				T							
First Data Omaha				Y							
First Data ValueLink				H							
EVO				T							
GETI**				H							
Givex				H							
Global Payments East -				H		T					
Heartland Payment				T							
ProPay				H							
SVS				H							
TSYS				T							

Valutec	H																										
Vantiv St. Pete Host	H			T																							
WorldPay	H			T																							

7.3 For Training:

Topic: PWC Merchant Training

Date: Every Tuesday, from Tuesday, January 31, 2012 to no end date

Time: 2:45 pm, Eastern Standard Time (New York, GMT-05:00)

Meeting Number: 754 111 841

Meeting Password: (This meeting does not require a password.)

To join the online meeting (Now from mobile devices!)

1. Go to <https://verifone.webex.com/verifone/j.php?ED=157040117&UID=-1&RT=MiMxMQ%3D%3D>
2. If requested, enter your name and email address.
3. If a password is required, enter the meeting password: (This meeting does not require a password.)
4. Click “Join”.
5. Follow the instructions that appear on your screen.

Note: You can view more information about the meeting at <https://verifone.webex.com/verifone/j.php?ED=157040117&UID=-1&RT=MiMxMQ%3D%3D>.

To join the audio conference only

To receive a call back, provide your phone number when you join the meeting, or call the number below and enter the access code.

Call-in toll-free number (US/Canada): 1-877-668-4493

Call-in toll number (US/Canada): +1-408-600-3600

Global call-in numbers: <https://verifone.webex.com/verifone/globalcallin.php?serviceType=MC&ED=157040117&tollFree=1>

Toll-free dialing restrictions: http://www.webex.com/pdf/tollfree_restrictions.pdf

Access code:754 111 841

For assistance

1. Go to <https://verifone.webex.com/verifone/mc>
2. On the left navigation bar, click "Support".

You can contact me at:

rich_a1@verifone.com

1-7707543580

The playback of UCF (Universal Communications Format) rich media files requires appropriate players. To view this type of rich media files in the meeting, please check whether you have the players installed on your computer by going to <https://verifone.webex.com/verifone/systemdiagnosis.php>.

Sign up for a free trial of WebEx

<http://www.webex.com/go/mcemfreetrial>

<http://www.webex.com>

CCP:+14086003600x754111841#

7.4 Additional documentation can be downloaded from the FTP site.

8. PA-DSS changes

8.1 Administrative Login : SUP changes

The first is the requirement for changing the administrative login of SUP at first login, to a unique user ID and password. There is also a new requirement for the use of a complex password for all Everest users. This is a password of a minimum of 7 characters, containing at least 1 alpha character, 1 numeric character and 1 symbol. In addition, there are changes to the password setup capabilities, with three being changes to the maximum and minimum values allowed for each setting.

Change of SUP user notes

Here are the details of changes done to the Everest default user 'Supervisor' credentials on V6.4 and beyond. These changes are done keeping PA-DSS certification requirements in view. Please read the instructions carefully before upgrade.

Generic SUP (Supervisor) user cannot be used in V6.4 and beyond. An Administrator user has to be created who should be identified by respective name. Post upgrade, on initial (first) logon attempt using SUP credentials, you will get a new user creation window. Please fill in details of a user who would be the Everest Administrator (Supervisor). Once you complete the details on new user window and click 'ok', Everest deactivates 'SUP' user and adds newly created user to 'Supervisor' group.

In addition to the above, user profile must contain the email addresses. These are used by Everest to send notification of Password expiry/ Password reset. You can update the user Email address from File > Setup > User > Double click on specific user to open User profile > General /Address tab.

It's mandatory to setup an email account with appropriate SMTP settings to send various user activation/ password emails. Email verification mechanism uses ACRM's email host settings to send emails.

Email hosts are configured at:

CRM | Business Activity Monitoring | Setup | E-mail Accounts

Here is how to find out what email host is used in ACRM:

CRM | Business Activity Monitoring | Setup | Configuration

Thus once SUP user is deactivated and new user is activated it is absolutely necessary to verify that SMTP settings are correct for ACRM. This is needed because of the way the login for other users is handled now.

When user (except SUP) which doesn't have email on file tries to login the form which asks for email is shown. Once user provides email the form asking for validation code is shown. The validation code is sent via email to the specified email address. Everest uses SMTP settings configured for ACRM to send activation codes. Thus if the settings are incorrect users will not be able to login (because Application Layer would not be able to send emails)

Known issue

Part of the "Change of SUP" feature (responsible for sending emails) is implemented in the Application Layer. This part locally (on the same computer) searches for another component which exists in the Data layer. **Thus this feature requires both Application Layer and Data Layer to be installed on the same computer.**

Tips and tricks

Don't have SMTP server

In case real SMTP server is unavailable the smtp4dev utility could be used to simulate SMTP server. The utility is available at smtp4dev.codeplex.com. Wink showing how to do first login with SUP user can be found at:

ftp://outsources.gdev.com/versata4/Everest/HelpfulWinks/sup_change/sup_change.swf

What if SUP user was deactivated before and SMTP settings for ACRM are incorrect?

Option 1: login with the user who is the member of SUPERVISOR group and has email on account (in that case email activation would not be requested).
Change SMTP settings for ACRM.

Option 2: Execute the following SQL query:

```
INSERT INTO [EVEREST_SAMPLE].[dbo].[EMAIL_HOST]
(
[ACTIVE]
,
[MAILER]
,
[HOST]
,
[PORT]
,
[SENDER]
,
[USER_NAME]
,
[PASSWORD]
,
[DISPLAY_NAME]
)
VALUES
(
'T'
,
'F'
,
'localhost'
,
'25'
,
'noreply@company.com'
,
'smtp_login or empty'
,
'smtp_password or empty'
,
'From Display Name'
)
```

GO

```
UPDATE ACRM_PREFERENCES
```

```
SET EMAIL_HOST_ID =@@IDENTITYWHERE ACRM_PREFERENCE_ID = 1
```

GO

1st query inserts new email host details (tweak them as needed before running the script) and then the second one updates ACRM settings to use just inserted email host to send emails.

8.2 Complex Password Requirement

There is also a new requirement for the use of a complex password for all Everest users. The new password requires a minimum of 7 characters, containing at least 1 alpha character, 1 numeric character and 1 symbol.

EXAMPLES:

- DOCD4fo)#
- K&&2469e9l
- `99999999n%
- l9kr6a6^
- *^^*)__*&g7

8.3 Changes to Password Setup

In addition, there are changes to the password setup capabilities, with there being changes to the maximum and minimum values.

8.4 Each User in Everest Must Have a Valid Email

For the proper implementation of new password requirements, each user of Everest must have a valid email address to allow for password setup, changes of and forgotten passwords, without requiring an administrator.

8.5 Administrative Purging of Credit Card Data

This feature will allow customers to purge or delete credit card data from their database based on the settings they select. Everest must allow administrators to purge/delete all cardholder data from their database: ONCE PURGED, do not click on old credit card information: Although the credit card number is purged, all other information is still there. An error is generated if you try to access it.

8.6 Encryption Keys and Credit Card Encryption

General notes

NOTE: Sensitive data cannot be recovered if cryptographic keys are lost or corrupted!

Starting with Everest 6.29 the credit card sensitive data is encrypted using the standalone cryptographic keys. Upon Everest 6.29 installation the keys need to be generated using the **KeyMgmt.exe** utility. The utility is included in the Data component of the Everest Server package. By default it is installed into c:\Program Files (x86)\Icode\Everest\Data\CCard KeyMgmt\KeyMgmt.exe. The procedure for the key's generation is explained below.

After upgrading from a previous version of the Everest, the credit cards information is still kept using the old encryption mechanism. It is available in all Everest functions which require read only access to a credit card's details. However it is impossible to modify an existing credit card or associate new credit card with a customer until cryptographic keys are generated.

First run

Once user logs in to the Everest the below message is shown. This message means the application layer cannot find the encryption keys. In the case of the first run it means the keys are not yet generated.

Keys generation

NOTE: Sensitive data cannot be recovered if cryptographic keys are lost or corrupted!

Keys are generated using **KeyMgmt** utility. By default it can be found in the following location:

c:\Program Files (x86)\lcode\Everest\Data\CCard KeyMgmt\KeyMgmt.exe

The main function of the utility is to generate the cryptographic keys and re-encrypt sensitive data using these keys. In order to execute such function the utility needs write access to the company database (EVEREST_<company>). Once the utility is executed it asks for the MS SQL server host name and database credentials which have read-write access to the company database (and at least read-only access to EVEREST_SYSTEM database).

Once connection to the database server is established the utility shows the following form:

Please select the correct company in the **Company code** drop down. Then click yellow icon next to the **Secret key path** input field and specify location and filename for the keys:

Finally click **Generate new key** button. You should see the following message if everything went fine:

Important: It is recommended to make the keys file backup into flash drive and keep it in a safe place.

Keys regeneration

NOTE: Sensitive data cannot be recovered if cryptographic keys are lost or corrupted!

PCI compliance lists the cases when the cryptographic keys need to be regenerated. In particular the keys need to be regenerated every 30 days. Everest shows the warning if the keys are outdated. In this case the keys generation procedure needs to be executed again. Everest does not block any functions when the keys are outdated, thus it is responsibility of the Everest administrator to regenerate the keys.

Important: keys regeneration requires file with the current keys to be available.

Distributed installations

Application and Data components of the Everest Server require access to the cryptographic keys (more precisely only Data layer, however Data layer is automatically installed together with the Application layer). Thus in cases of the distributed installations there might be more than one host which needs access to the keys. For such deployment scenarios there are two options:

Option 1 - Shared location for the keys. Cryptographic keys are generated in the shared location which all the involved hosts have at least read access to. With this option the **Secret key path** field contains shared location path (similar to the one shown below).

Option 2 - Manual keys distribution. If there is no way to use shared location then it is also possible to generate the keys using local path (for example c:\ProtectedFolder\asc.key) and then copy the keys file to all the involved hosts into exactly the same location.

9. Upgrade Instructions

Everest Standard V6.36.4 can be obtained by creating a Zendesk incident ticket to either obtain the download credentials or arrange for our Managed Upgrade team to schedule an installation.