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**Version 6.14 – Everest Standard**



Customer Release Notes

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# Release Overview

Everest Standard Update V6.14 has 58 bug fixes. There are also 3 New Features implemented.

|  |  |
| --- | --- |
| * **Release Version** | Everest Standard V6.14 |
| * **Release Date** | March 12 2013 |
| * **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 |

# Everest 6.X Minimum System Requirements

|  |  |
| --- | --- |
| **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** |  |
|  | Everest Standard |
| Operating system | Windows   2008 SP2 x64 or R2 |
| Database Software | MS SQL Server 2008 R2 x 64 Express or Standard  (Standard Recommended) |
| Memory | 4GB |
| 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 V6 should be directed to Customer Support at** [**support@versata.com**](mailto:support@versata.com)

**Windows Small Business Server is not supported.**

# 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

# Summary of fixed Customer Reported issues

Everest Standard Edition V6.14 has 58 fixes. Fixes for the following customer reported issues have been included in this release (Zendesk ID). In addition, there are internally reported issue fixes. There are a total of 3 new features in V6.14. Also included is a critical Credit Card Security Update. Instructions are provided on what is required.

* 1. **Performance Issues**

In this release Performance relating to Sales Orders is resolved

* 1. **Sales Journal Printing**

In this release, the issue in which trying to print a defined number of sales journals caused all sales journals to print is resolved.

* 1. **Credit Card Deactivation**

The ability to deactivate credit cards is restored in this release.

* 1. **Encryption Keys and Credit Card Encryption**

Starting with Everest 6.14 the credit card sensitive data is encrypted using the standalone cryptographic keys. Upon Everest 6.14 installation the keys need to be generated using the KeyMgmt.exe utility.

**PLEASE SEE BELOW, section 8.6 FOR CRITICAL INFORMATION**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Fixes for V6.14** | | | | |
| **Key** | **ZendeskID** | **Summary** | **Type** | **Release Notes** |
| [EVCID-1737](http://issue-tracker.gdev.com/browse/EVCID-1737) |  | Accounting>New Account : Account Code accepts invalid chars(eg:-comma, dot) | Bug |  |
| [EVCID-1760](http://issue-tracker.gdev.com/browse/EVCID-1760) |  | Refreshing "Matrix Items" window collapses open "Type" nodes | Bug | If there are expanded type nodes in Matrix Items windows and the refresh button is selected, the nodes must be expanded again to visualize |
| [EVCID-1805](http://issue-tracker.gdev.com/browse/EVCID-1805) |  | Print with all tasks selected displays only 1 task | Bug |  |
| [EVCID-1887](http://issue-tracker.gdev.com/browse/EVCID-1887) |  | Quantity field validation issues | Bug | When selecting a range in a reverse order, i.e. 1 00 -1, is accepted. With the fix, it shows up as the correct range on the documents 1-100. |
| [EVCID-2032](http://issue-tracker.gdev.com/browse/EVCID-2032) | 28200 | Two Multimedia locations created with installation of 6.x | Bug | A sample company multimedia folder is created iCode/Everest/Multimedia/ASC when installing Everest V6.x |
| [EVCID-2077](http://issue-tracker.gdev.com/browse/EVCID-2077) | 29737 | Re: Item Browser error for Stock Status | Bug | The Quantity for SO and PO column was added with a quantity of the item with plus and negative on the same item |
| [EVCID-2091](http://issue-tracker.gdev.com/browse/EVCID-2091) |  | Matrix Elements: Reactivate records - Multiple records cannot be selected. | Bug | Matrix elements from different attribute groups cannot be activated at the same time. |
| [EVCID-2114](http://issue-tracker.gdev.com/browse/EVCID-2114) | 29885 | Duplicate items | Bug | Items were appearing multiple times in the Items Browser if there were multiple replenishment locations. |
| [EVCID-2120](http://issue-tracker.gdev.com/browse/EVCID-2120) |  | The print preview pop-up is sent back to order pop-up window and is not visible | Bug | When the window opens, it is behind the Everest window. It must be clicked on to bring it forward for visibility. |
| [EVCID-2131](http://issue-tracker.gdev.com/browse/EVCID-2131) | 30969 | Shipper tracking number display on invoice for partial shipment | Bug | When entering a due delivery date, the shipment tracking date shows as the delivery date rather than the ship date |
| [EVCID-2147](http://issue-tracker.gdev.com/browse/EVCID-2147) | 31192 | I can't open the items browser. It gives me an error message that says "unable to bring up the requested form" | Bug | Unable to open the item browser after adding custom fields, saving, closing and trying to reopen. An error is given. |
| [EVCID-2153](http://issue-tracker.gdev.com/browse/EVCID-2153) |  | Inconsistency with stock transfers for the unit measure | Bug | Same type UM should be selected regardless of Item selection method and for this Stock transfer document it must be Stock UM |
| [EVCID-2189](http://issue-tracker.gdev.com/browse/EVCID-2189) |  | Error in Multiple Payments for Accounts Payable | Bug | Several errors occur throughout the processing of the Multiple Payment Wizard. Eventually it is no longer able to proceed. |
| [EVCID-2191](http://issue-tracker.gdev.com/browse/EVCID-2191) | 37468 | Shipped Sales Orders are not coming up | Bug |  |
| [EVCID-2192](http://issue-tracker.gdev.com/browse/EVCID-2192) |  | Inconsistent behavior in discontinue functionality | Bug | When and item is discontinued in the browsers, the item should be removed at confirmation. |
| [EVCID-2209](http://issue-tracker.gdev.com/browse/EVCID-2209) |  | Custom Tracking generates error when clicking outside of window and then back. | Bug | Click Invoicing -> Custom Tracking -> Customer from menu options.  Select CUSTOMER TRACKING CATEGORY from Tracking Category drop down list.  Click NEW TRACKING GROUP.  Click on Everest Main Application  Click on Customer tracking setup dialog  Warning appears. |
| [EVCID-2214](http://issue-tracker.gdev.com/browse/EVCID-2214) |  | Sent date/time on BAM emails is 4 hours off | Bug |  |
| [EVCID-2235](http://issue-tracker.gdev.com/browse/EVCID-2235) | 34399 | Item Replenishment | Bug | The saved Filter for the Item Replenishment is causing an error |
| EVCID-2244 |  | An unexpected warning window "Control '' has no parent window" is encountered when editing a tracking group. | Bug | An unexpected warning window "Control '' has no parent window" is encountered when editing a tracking group. |
| [EVCID-2246](http://issue-tracker.gdev.com/browse/EVCID-2246) | 36445 | Customer Browser Issue | Bug | In the customer browser, the Get record number does not work when modified. |
| [EVCID-2247](http://issue-tracker.gdev.com/browse/EVCID-2247) | 36685 | Everest v6: Job Code Error on 1st click | Bug | When any purchase or sales document is opened for edition, Clicking on 'Job Code' results in an error 'Filed 'Job Status' not found'. This error is also logged in the clnterr.log |
| [EVCID-2252](http://issue-tracker.gdev.com/browse/EVCID-2252) |  | An unexpected warning window with text "Control '' has no parent window" is encountered editing a Group for Tracking Category | Bug |  |
| [EVCID-2256](http://issue-tracker.gdev.com/browse/EVCID-2256) | 36465 | Sales Invoice Browser | Bug | In the browser, the Get record number does not work when modified. |
| [EVCID-2257](http://issue-tracker.gdev.com/browse/EVCID-2257) |  | Attendance Report is not complete | Bug | Report text is cut off at the right bottom of the header. |
| [EVCID-2265](http://issue-tracker.gdev.com/browse/EVCID-2265) | 36367 | Issues after upgrade to 6.9 from 5.0.2.6 | Bug | Yahoo Sales Order import fails with a message for the Kit Type Items. |
| [EVCID-2271](http://issue-tracker.gdev.com/browse/EVCID-2271) |  | "Bank Account" dropdown while creating Payment Register doesn't retain data. | Bug |  |
| [EVCID-2354](http://issue-tracker.gdev.com/browse/EVCID-2354) | 39000 | Quantity Adjustment browser's records in block setting not working | Bug | When changing the block records in the property menu from 10 t0 50,. Press Get button to fetch more. It fetches no more records but should fetch 50 more records according to block size |
| [EVCID-2356](http://issue-tracker.gdev.com/browse/EVCID-2356) | 39409 | Error Message While Refreshing Document Task in SO | Bug | An access violation appears |
| [EVCID-2358](http://issue-tracker.gdev.com/browse/EVCID-2358) | 40047 | Import Data - Item Replenishment Vendor Info does not work | Bug | An error message is generated when the wizard starts to process |
| [EVCID-2360](http://issue-tracker.gdev.com/browse/EVCID-2360) | 37129 | Icons not appearing on sales/purchase document | Bug | This is when opening up the description in a browser. |
| [EVCID-2394](http://issue-tracker.gdev.com/browse/EVCID-2394) | 41828 | Issue entering 1st line item on sales orders. Select item alias description instead of extended sales description. | Bug |  |
| [EVCID-2400](http://issue-tracker.gdev.com/browse/EVCID-2400) | 43118 | Error when viewing shipping address menu from sales browser | Bug | The Sales order browser when the Shipping address column is added, after being saved and reopened again. The content of the address can't be opened again showing an error message "Field 'SHIP\_ADDRESS' is not found" |
| [EVCID-2426](http://issue-tracker.gdev.com/browse/EVCID-2426) |  | we are on 6.11 | Bug | Accounting> Account Receivable> Sales Journal. When selecting one journal to print, all are printed. |
| [EVCID-2434](http://issue-tracker.gdev.com/browse/EVCID-2434) | 45905 | 6.11 Test Bugs | Bug | The ability to deactivate and see the deactivated credit cards does not work |
| [EVCID-2436](http://issue-tracker.gdev.com/browse/EVCID-2436) |  | Matrix Items UnCheckBox and Save doesn't work | Bug |  |
| [EVCID-2442](http://issue-tracker.gdev.com/browse/EVCID-2442) | 48215 | User needs to be Supervisors group to process payroll transactions | Bug |  |
| [EVCID-2445](http://issue-tracker.gdev.com/browse/EVCID-2445) |  | When Click on History -> GL Transactions, over any Vendor in Vendor Browser dialog it is shown a warning dialog | Bug |  |
| [EVCID-2454](http://issue-tracker.gdev.com/browse/EVCID-2454) |  | Error Modal on Sales Stage Activation | Bug | It's is not possible to activate a discontinued sales stage |
| [EVCID-2457](http://issue-tracker.gdev.com/browse/EVCID-2457) |  | Sales Invoice - Ship Date Changing when Emailing Document | Bug |  |
| [EVCID-2459](http://issue-tracker.gdev.com/browse/EVCID-2459) |  | Show Prieview Notes does not show all notes. | Bug | Only one note is shown |
| [EVCID-2462](http://issue-tracker.gdev.com/browse/EVCID-2462) |  | Header Text truncated in Purchase Order Report | Bug |  |
| [EVCID-2463](http://issue-tracker.gdev.com/browse/EVCID-2463) |  | "Save Now" and "Save on Exit" are not working in the browsers | Bug |  |
| [EVCID-2469](http://issue-tracker.gdev.com/browse/EVCID-2469) | 50935 | Special Pricing Issues | Bug | The web price is displaying a wrong price, where it is only calculated by one criteria only on the special pricing. |
| [EVCID-2476](http://issue-tracker.gdev.com/browse/EVCID-2476) | 52274 | Not able to discontinue detailed accounts in COA. Unable to activate any type of Account from discontinued in COA | Bug |  |
| [EVCID-2481](http://issue-tracker.gdev.com/browse/EVCID-2481) | 52936 | New BAM event creation fails with "unable to save given data" | Bug | When creating a activity and a new email template, an error is thrown when attempting to send the email |
| [EVCID-2482](http://issue-tracker.gdev.com/browse/EVCID-2482) | 52642 | Everest Performance | Bug |  |
| [EVCID-2487](http://issue-tracker.gdev.com/browse/EVCID-2487) | 52829 | unable to save fields arrangements. | Bug | Unable to save wen sorting by column in te items browser |
| [EVCID-2488](http://issue-tracker.gdev.com/browse/EVCID-2488) | 50847 | Sales Commission Reporting Incorrectly | Bug | The total commission rate that appears on the Sales Commission report is incorrect. Total Commission Rate in the Invoice always takes value from last item on the invoice. Although the Commission Rate in the Total is incorrect, commission amount seems to be calculating properly. |
| [EVCID-2495](http://issue-tracker.gdev.com/browse/EVCID-2495) | 57916, 60164 | Sales Order - Reference # Field Masking | Bug | When paying with cash or check, the reference number is masked as though it is a credit card number |
| [EVCID-2497](http://issue-tracker.gdev.com/browse/EVCID-2497) |  | Automated Purchases - Item selection filter is not saved correctly | Bug | 'Items to include in replenishment preview' automatically changed to "Items with supply below planned" |
| EVCID-2516 | 53999 | Tax Rate on Purchases | Bug | Purchase Tax Rate in the Tax Component only accept 2 decimal, while in the Sales Tax Rate it is able to accept up to 3 decimal |
| [EVCID-2519](http://issue-tracker.gdev.com/browse/EVCID-2519) | 54428 | Find Items Filter does not work properly | Bug | Find Item filter returns an empty window then closes again |
| EVCID-2520 | 55254, 29885 | showing duplicate item on the item browser | Bug | Adding an Item Replenishment location on item profile cause the item duplicated listed in the item browser |
| [EVCID-2564](http://issue-tracker.gdev.com/browse/EVCID-2564) | 56301 | error invoicing when wrong stock bin is first selected | Bug | After adding a shipped quantity to an invoice and trying to change it using Attach Quantity window, an error is thrown |
| [EVCID-1228](http://issue-tracker.gdev.com/browse/EVCID-1228) |  | PA-DSS Protected stored cardholder data | Bug |  |
| EVCID-2254 | 36720 | Error when using Data Import Feature | Bug | When using data import wizard it shows number of records imported correctly for records in import.csv, but checking item's replenishment tab shows no info about Replenish Vendor Related Information. It throws an error 42024 edata.doPersonal, TboUser.ReAssignUsers3 |
| [EVCID-2420](http://issue-tracker.gdev.com/browse/EVCID-2420) |  | Related Item can't be created | Bug | When trying to create a related item in the item browser, for an item, an error is generated |
| [EVCID-2434](http://issue-tracker.gdev.com/browse/EVCID-2434) | 45905 | 6.11 test bugs | bug | When trying to discontinue a newly added credit card, an error message is displayed and it cannot be discontinued. |
| [EVCID-2429](http://issue-tracker.gdev.com/browse/EVCID-2429) | 45412 | 6.11 upgrade | Managedl Upgrade | Due to DB schema changed, upgrading db from previous versions did not show existing credit cards |
| [EVCID-2055](http://issue-tracker.gdev.com/browse/EVCID-2055) | 28401 | Need time added back to Sales Document History tab | New Feature |  |
| [EVCID-2229](http://issue-tracker.gdev.com/browse/EVCID-2229) | 32427 | how to increase the decimal places on weight values | New Feature | Assembly setup allows 5 decimal places, work orders allow only 4. |
| [EVCID-2074](http://issue-tracker.gdev.com/browse/EVCID-2074) |  | Cannot copy serial numbers in PO / PR | New Feature |  |
| [EVCID-2283](http://issue-tracker.gdev.com/browse/EVCID-2283) |  | Form 941 2012 | Task |  |
| [EVCID-2296](http://issue-tracker.gdev.com/browse/EVCID-2296) |  | 2012 W-2 Forms | Task | Updated W-2 Form from 2011 to 2012 |
| [EVCID-2486](http://issue-tracker.gdev.com/browse/EVCID-2486) |  | Changes to FORM 940 | Task |  |
| [EVCID-2492](http://issue-tracker.gdev.com/browse/EVCID-2492) |  | Form 941 2012 | Task |  |
| [EVCID-2499](http://issue-tracker.gdev.com/browse/EVCID-2499) |  | US Payroll Tax Update 2013 | Task |  |

# Known Issues

Everest Standard Edition currently has 16 New Features and 30 known issues in development.

* 1. **Average Cost**

1. When SI is created and saved we have about 20 DB tables modified and there are about 5 tables related to accounting. This means values put on accounts based on the fact the cost is $0.0.   
  
2. SI has a History tab and this tab has a column Profit, this column shows value based on the cost. In our case after first SI is created the profit is $120.   
  
3. There are also taxes associated with the sale and there might be taxes which use profit as the base for calculation. Transaction tab shows how accounts get changed.   
  
4. Looking at various method for calculation the average cost, there are something like FIFO, LIFO and etc., In order to implement this request correctly we need to know what accounts needs to change because of such PI change and what other values should be changed. Current behavior keeps accounts balanced.

* 1. Duplicate Customer PO# not being caught

No prompt is displayed while saving orders when duplicate Purchase Order number is used on Sales Order, Credit Orders

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **EVEREST 6.15 & 6.16** | | | | | | | | |
| **Key** | **ZendeskID** | **Fix Version** | | **Summary** | **Status** | | **Release Notes Description`** | |
| EVCID-2484 | 34170 | 6.14 | Bug: Average cost | | | Bug | | Cost Adjustment Document should be created based on the current values so that the values should reflect the actual inventory values and the average cost of each item. Now it is based on the first value. Support is reviewing. Exception was made for $0. But further adjustments could break accounting functionality |
| [EVCID-1366](http://issue-tracker.gdev.com/browse/EVCID-1366) |  | 6.16 | Export Company not working, returns error | | | Bug | | The export fails, returns error 'Unable to export company database' |
| [EVCID-1371](http://issue-tracker.gdev.com/browse/EVCID-1371) |  | 6.16 | Incorrect values do not revert to default values | | | Bug | | In password setting, unacceptable values revert to zero instead of default |
| [EVCID-1650](http://issue-tracker.gdev.com/browse/EVCID-1650) | 24201 | 6.16 | Data warehouse - Analysis Server is not installed Error with SQL Server 2008 64 Bit | | | Bug | |  |
| [EVCID-1766](http://issue-tracker.gdev.com/browse/EVCID-1766) |  | 6.17 | Set up payFlow Pro - Form accepts single characters | | | Bug | | In setup for payment methods, there is now filter for unacceptable entries. |
| [EVCID-1813](http://issue-tracker.gdev.com/browse/EVCID-1813) |  | 6.16 | Document Tracking >Group and Selection fields are blank in report even if selected during generation | | | Bug | | Document Tracking >Group and Selection fields are blank in report even if selected during generation |
| [EVCID-1870](http://issue-tracker.gdev.com/browse/EVCID-1870) |  | 6.15 | ESF - Email product to a friend doesn't work | | | Bug | |  |
| [EVCID-1885](http://issue-tracker.gdev.com/browse/EVCID-1885) |  | 6.16 | The customer action group can have both the rank and description empty | | | Bug | | When Clicking 'CRM' -> 'Opportunity Management' -> 'Setup' -> 'Customer Action' from menu options. It is possible to delete Rank and/or Descriptions and leave them blank without error |
| [EVCID-1888](http://issue-tracker.gdev.com/browse/EVCID-1888) |  | 6.16 | Print Preview does not display all pages | | | Bug | | In "Reports" > "Invoicing" > "Best Item (Sales)", when exporting to CVS, not all pages are displayed in print preview |
| [EVCID-2033](http://issue-tracker.gdev.com/browse/EVCID-2033) | 28531 | 6.15 | Sales Order that cannot get put through Pull Sheet Wizard | | | Bug | | The Partially shipped order doesn't get shown in the pull sheet |
| [EVCID-2111](http://issue-tracker.gdev.com/browse/EVCID-2111) | 28391 | 6.15 | Re: Item Alias not showing on Credit Order Documents | | | Bug | | When an Item Alias's Description is modified the Item alias column in the Sales Document is removed |
| [EVCID-2123](http://issue-tracker.gdev.com/browse/EVCID-2123) |  | 6.15 | Document Tasks in Sales Orders does not show tasks until goes back to Details tab and then back to Document Task tab. | | | Bug | | When the Documents Task tab is selected, no tasks appear. If you go back to the Details Tab and then Select Document Task tab, the tasks appear. They do not appear when entered and refresh is selected. |
| [EVCID-2146](http://issue-tracker.gdev.com/browse/EVCID-2146) | 30547 | 6.15 | CRM Version 8 | | | Bug | | Fixed IM Delivery issue of "Unable to create IMAPP object 429 ActiveX component can't create object" |
| [EVCID-2187](http://issue-tracker.gdev.com/browse/EVCID-2187) |  | 6.16 | Error in the appointments page | | | Bug | | When an invalid date is entered, and error message appears, and when OK is clicked, a random date appears. |
| [EVCID-2275](http://issue-tracker.gdev.com/browse/EVCID-2275) | 37178 | 6.15 | Document Task - Modify Date / Time not correct | | | Bug | | When a task is created for a sales quote or document, the modified date shown is actual modified date - 7hrs |
| [EVCID-2393](http://issue-tracker.gdev.com/browse/EVCID-2393) | 33341 | 6.15 | [Re: Stock Count Browser Locks Up](http://issue-tracker.gdev.com/browse/EVCID-2393) | | | Bug | | In testing we have found that large orders or documents with a large amount of data take much longer to process. |
| [EVCID-2438](http://issue-tracker.gdev.com/browse/EVCID-2438) | 46673 | 6.15 | Two customers with one email address | | | bug | | When entering an email in which it belongs to 2 customers, and asked to distinguish the customer ID by answering the secret question. When answering one, there Is an error message: More than one registered users are there for the Email ID.You are requested to select the account Code.. |
| [EVCID-2461](http://issue-tracker.gdev.com/browse/EVCID-2461) |  | 6.16 | Formatting in Purchase History Report not aligned to fit into header. | | | Bug | | Reports => Purchasing => Item Purchase History, In the header, for User Adminiistrator is truncated to Administrato |
| [EVCID-2514](http://issue-tracker.gdev.com/browse/EVCID-2514) | 54568 | 6.16 | Grouping cannot be done | | | Bug | | Unable to group the Customer Browser's Fiscal Year Column |
| [EVCID-2515](http://issue-tracker.gdev.com/browse/EVCID-2515) | 59678 | 6.16 | Images not appearing | | | Bug | | When opening the browser for the description field in the service order, the icons do not show up with text or images. |
| [EVCID-2518](http://issue-tracker.gdev.com/browse/EVCID-2518) |  | 6.15 | No 'Authorization' transaction type in Point of Sale | | | Bug | | There should be an option for 'Authorization' transaction type in 'Card Verification' form for Point of Sale. |
| [EVCID-2521](http://issue-tracker.gdev.com/browse/EVCID-2521) | 53923 | 6.16 | Account Activity - Find Activity Issue | | | Bug | | Entering the text in the journal # as search criteria is not being applied |
| [EVCID-2522](http://issue-tracker.gdev.com/browse/EVCID-2522) | 56129 | 6.16 | Duplicate Customer PO# not being caught ?? | | | Bug | | No prompt is displayed while saving orders when duplicate Purchase Order number is used on Sales Order, Credit Orders |
| [EVCID-2561](http://issue-tracker.gdev.com/browse/EVCID-2561) | 56538 | 6.15 | REMINDER - TASKS | | | Bug | | Printing Task Report from Task Window shows no data on report |
| [EVCID-2570](http://issue-tracker.gdev.com/browse/EVCID-2570) | 58000 | 6.15 | Payment Journal will not disappear after posting | | | Bug | | A non-printed journal is able to be posted, but the journal stays un-posted |
| [EVCID-2577](http://issue-tracker.gdev.com/browse/EVCID-2577) | 54430 | 6.15 | Freight Estimator Rate Shop is screwed up | | | Bug | | When importing freight rates, and then using the freight estimator, the List shows all other rates that are not related the customer's zone |
| [EVCID-2579](http://issue-tracker.gdev.com/browse/EVCID-2579) | 58499 | 6.16 | Unable to Add A Zip Code | | | Bug | | Extended Mode Checkbox is missing, which disabled various ability, one of them are adding ZIP Code |
| [EVCID-2584](http://issue-tracker.gdev.com/browse/EVCID-2584) | 57430 | 6.16 | PayPal Set-up | | | Bug | | Checkout with paypal should allow other currencies in web shop not throw order total invalid error. Cannot check entire buying process with GBP as currency |

# New Feature Requests

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **EVEREST 6.15 & 6.16** | | | | | | | | |
|  | |  | |  |  |  | |  |
| **Key** | **ZendeskID** | | **Fix Version** | **Summary** | **Status** | **Release Notes Description`** | | |
| [EVCID-1117](http://issue-tracker.gdev.com/browse/EVCID-1117) |  | | 6.15 | E-commerce credit card verification requirements | New Feature | | This will force CVV and address verification for all credit card transactions | | |
| [EVCID-1292](http://issue-tracker.gdev.com/browse/EVCID-1292) |  | | 6.16 | How to prevent sales associates to change the price of an item in sales invoice? | New Feature | | In the POS tool, if an order is started with one customer, and then the customer is changed, a warning is shown to retain or recalculate the prices. If the customer selects retain, a security dialog is shown asking for the supervisor account and then change can’t be made. | | |
| EVCID-1495 | 15180 | | 6.16 | SMTP TLS Encryption for CRM email account | New Feature | | Due to an update with our email provider, we need to update our email settings (the accounts listed in CRM > Business Activity Monitoring > Setup > Email Accounts). While there is an option to change the port number, there does not appear to be an option to enable email encryption (i.e., TLS over port 587). | | |
| [EVCID-1618](http://issue-tracker.gdev.com/browse/EVCID-1618) |  | | 6.16 | Integrate and Test UPS Worldship in Everest 6.x | New Feature | |  | | |
| [EVCID-2060](http://issue-tracker.gdev.com/browse/EVCID-2060) | 28701 | | 6.16 | Gift Card Setup. | New Feature | |  | | |
| [EVCID-2110](http://issue-tracker.gdev.com/browse/EVCID-2110) | 29862 | | 6.16 | Customer Level Discount Not Being Applied to Kit Items | New Feature | | The Item Kit that was using 'Use Item Price defined in the kit details' as its pricing calculation is not re-calculated when the customer is using special pricing scheme, such us customer level discount, but including the original value that was defined in the customer kit. | | |
| [EVCID-2141](http://issue-tracker.gdev.com/browse/EVCID-2141) | 29349 | |  | Historical Inventory Valuation Report does not include items that have been deactivated | New Feature | |  | | |
| EVCID-2172 |  | |  | Create new Add-on Package with additional events and tags for Everest BAM | New Feature | |  | | |
| EVCID-2176 | 33540 | | 6.15 | Feature Request: Security Restrictions for Default Jurisdiction and Location window | New Feature | |  | | |
| [EVCID-2411](http://issue-tracker.gdev.com/browse/EVCID-2411) |  | |  | Check Printing Alignment | New Feature | | Check printing is a pre-assigned size, not allowing for margins to be adjusted | | |
| [EVCID-2450](http://issue-tracker.gdev.com/browse/EVCID-2450) | 43343 | | 6.16 | Everest 6.12.1 is not limiting users to access the stock bins ONLY in their logged in location | New Feature | | Everest 6.12.1 is not limiting users to access the stock bins ONLY in their logged in locatio | | |
| EVCID-2456 | 49737 | | 6.15 | Increase PO\_NO column in SHIPMENT\_TRACKING\_DETAILS table | New Feature | |  | | |
| [EVCID-2466](http://issue-tracker.gdev.com/browse/EVCID-2466) | 50314 | | 6.17 | Cannot set default search to search by description in a purchase journal. | New Feature | |  | | |
| [EVCID-2466](http://issue-tracker.gdev.com/browse/EVCID-2466) | 50314 | | 6.15 | Cannot set default search to search by description in a purchase journal. | New Feature | |  | | |
| [EVCID-2467](http://issue-tracker.gdev.com/browse/EVCID-2467) | 50897 | |  | POS sales | New Feature | |  | | |
| [EVCID-2490](http://issue-tracker.gdev.com/browse/EVCID-2490) |  | | 6.16 | Integrate PayPros API into Everest | New Feature | |  | | |
| [EVCID-938](http://issue-tracker.gdev.com/browse/EVCID-938) | 11721 | | 6.16 | eStorefront - implement 'Wish List' feature | New Feature | |  | | |

# Verifone PAYware Connect Payment Processor

* 1. **Steps to Obtain a PAYware Connect Account Directly through VeriFone**

1. Obtain a copy of your VAR merchant setup sheet from your merchant bank.
2. Know how many credit card transactions you process monthly. This info can be also obtain by your merchant bank.
3. Call Victoria Hartless at: 912-527-4407 or by email: [Victoria\_H1@verifone.com](mailto:Victoria_H1@verifone.com) to obtain a PAYware Connect account.
4. State that you need to setup a PAYware Connect account for your POS software “Everest”.
5. Provide your processor name (which will be on the VAR sheet that your merchant bank provided you)
6. Provide the number of transactions you process monthly.
7. Let her know you will be paying the PAYware Connect gateway fees by either credit card or ACH.
8. Victoria will then send you a contract to sign.
9. Email or Fax your contract to Victoria for your account to be setup.
10. Once Victoria has setup the account you will receive an “Activation Email” with your credentials.
11. Skip to Step 6
12. Should Victoria Hartless not be available or has not responded within 24 hours, you can call VeriFone Inside Sales Team (See #5).
13. Call VeriFone Inside Sales Team at: 800-725-9264, Option 1.
14. Tell the representative that you need to setup a PAYware Connect account for your POS software “Everest”.
15. Provide them with your processor name (which will be on the VAR sheet that your merchant bank provided you)
16. Provide them the number of transactions you process monthly.
17. Let them know you will be paying the PAYware Connect gateway fees by either credit card or ACH.
18. The rep will then send you a contract to sign.
19. Email or Fax your contract to the rep for your account to be setup.
20. Once the rep has setup the account you will receive an “Activation Email” with your credentials.
21. 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.
    1. **PAYware Connect Authorization Networks and Features - VeriFone, Inc.**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Host/Terminal | Retail | Direct Mktg - MOTO | Restaurant | Ecommerce | Master Card/VISA | American Express | Discover/Diners | JCB Card | Private Label | Online Debit | EBT | Gift Card | Verification | ECC (e-Check Conversion) | Check Refund | Visa/MC Level 2 | AVS | CVV2\CVC2 | CID (Amex) | CID (Discover) | VbV/3D Secure | MasterCard UCAF | Auth Verification | Discover Partial Reversal | MC Partial Reversal | VISA Partial Reversal | Partial Auth | Visa Bill Pay | Custom Data | Contactless | Recurring Billing Indicator | CAT Level Indicator | FSA/ HRA Descriptors |
| **PAYware Connect Auth Networks** | Cert | Business Type | | | | Credit Card Type | | | |  | Other cards | | | Check | | | L2 | Fraud Prevention | | | | | | | Reversals | | | Features | | | | | | |
| Chase Paymentech Tampa Host | 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 | • | • | • | • | • | • | • | • |  | • | • | •1 |  |  |  | • | • | • | • | • |  |  |  | • | • | • | • |  |  |  |  |  |  |
| GETI\*\* | H |  |  |  |  |  |  |  |  |  |  |  |  | • | • | • |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Givex | H |  |  |  |  |  |  |  |  |  |  |  | •1 |  |  |  |  |  |  |  |  |  |  |  |  |  |  | • |  |  |  |  |  |  |
| Global Payments East - Host | H | • | • | T | • | • | • | • | • |  | • |  |  |  |  |  | • | • | • | • | • |  | • | • |  |  | • | • | • |  | • | • |  |  |
| Heartland Payment Systems | T | • | • | • | • | • | • | • | • |  | • |  |  |  |  |  | • | • | • | • | • |  |  |  |  |  | • | • |  |  | • |  |  | • |
| ProPay | H | • |  |  |  | • | • | • | • |  |  |  |  |  |  |  |  | • |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| SVS | H | • |  |  |  |  |  |  |  |  |  |  | • |  |  |  |  |  |  |  |  |  |  |  |  |  |  | • |  |  |  |  |  |  |
| TSYS | T | • | • | • | • | • | • | • | • |  | • |  | • |  |  |  | • | • | • | • | • |  |  | • | • | • | • | • |  |  | • | • |  | • |
| Valutec | H |  |  |  |  |  |  |  |  |  |  |  | •1 |  |  |  |  |  |  |  |  |  |  |  |  |  |  | • |  |  |  |  |  |  |
| Vantiv St. Pete Host | H | • | • | T | • | • | • | • | • |  | • |  | • |  |  |  | • | • | • |  |  |  |  | • | • | • | • | • |  |  | • | • |  | • |
| WorldPay | H | • | • | T | • | • | • | • | • |  | • |  | • |  |  |  | • | • | • | • | • |  |  | • |  |  |  | • |  |  | • | • |  |  |

* 1. **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#

* 1. **Additional documentation can be downloaded from the FTP site.**

# PA-DSS changes

* 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 there 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.

--- a screen shot can be attached here….

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://outsource.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:

INSERTINTO [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.

* 1. **Complex Password Requirement**

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.

EXAMPLES:

* DOCD4fo)#
* K&&2469e9I
* `999999999n%
* I9kr6a6^
* \*^^\*)\_\_\*&g7
  1. **Changes to Password Setup**

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

* 1. **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.

* 1. **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.

* 1. **Encryption Keys and Credit Card Encryption**

**General notes**

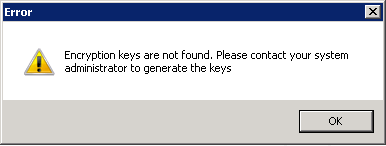
**NOTE: Sensitive data cannot be recovered if cryptographic keys lost or corrupted!**

Starting with Everest 6.14 the credit card sensitive data is encrypted using the standalone cryptographic keys. Upon Everest 6.14 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 logins 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.

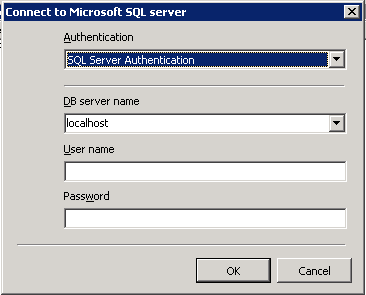


**Keys generation**

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

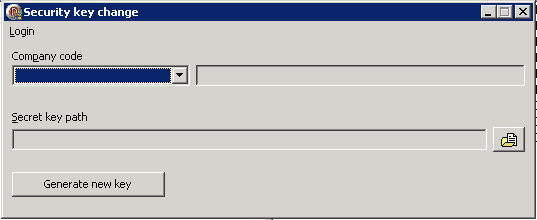
Keys are generated using **KeyMgmt** utility. By default it can be found in the following location:

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

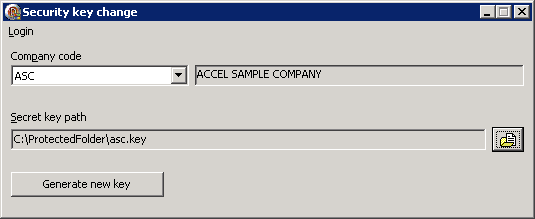


The main function of the utility is to generate the cryptographic keys and re-encrypt sensitive data using these keys. In order to execute such function the utility needs write access to the company database (EVEREST\_*<company>*). Once the utility is executed it asks for the MS SQL server host name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

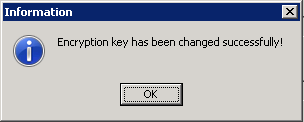
Once connection to the database server is established the utility shows the following form:



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:

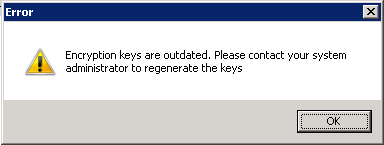


**Important: It is recommended to make the keys file backup into flash drive and keep it in a safe place.**

**Keys regeneration**

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

PCI compliance lists the cases when the cryptographic keys needs to be regenerated. In particular the keys needs 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.

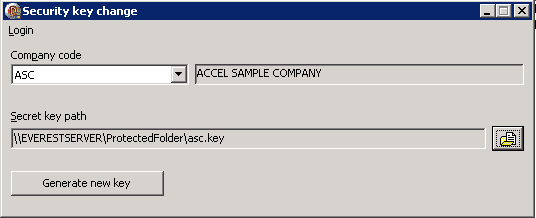


**Important: keys regeneration requires file with the current keys to be available.**

**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 the there are two options:

**Option 1 - Shared location for the keys**. Cryptographic keys are generated in the shared location which all the involved hosts has 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.

# Upgrade Instructions

Everest Standard V6.14 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.