Procedures for implementing ShipRite/Genius

There are 3 elements need to be setup for the successful loading of the ShipRite/Genius platform.   First is the Genius device itself.   Next is the Smart Swiper program and finally the ShipRite program.

SETUP GENIUS

Requirements

1. Cabled internet access. Does not operate wireless

2. Counter space.

Setup

1. Plug in internet to the combination interface cable; not <u>directly into the terminal</u>.

2. Plug combination interface cable into the Genius device. Be sure to secure the cable properly to the device.

3. Plug in the power adapter to the combination interface cable. Plug into the wall.

4. The 9 pin serial adaptor is NOT used for anything.

Getting the IP address of the terminal

1. With power on, hit the '0' key 3 times. This will get you into the admin panel.

2. Password is 9416557

3. Look for and record the IP address. You will need this to configure Smart Swiper.

Testing connectivity

1. Look for the "TEST" button on the devices screen and touch it.

2. If it says "Passed" you are good to go. If it fails, the maintenance procedure will need to be done to re-initialize the device.

3. To go back, click on the 'X' button.

Configuring Static IP

Your network administrator may recommend setting your device to have a static IP address.   The reason is that it is possible for the IP address to change if the IP address is not static.   Here's how to configure the static IP address: Note, use the stylus to navigate the menu within the Genius screens.

- Make sure you have your IP address, subnet mask, Gateway and DNS1 from your network administrator for the Genius device to connect to your router/switch.
- On the keypad, hold down 1, 5 and 9 buttons together for two seconds, and then release.
- Use the keypad to insert the password 166832 and press Enter.
- On the tabs at the top of the screen, touch Administration and then Communication.
- From the tabs at the top of the Communications screen, touch Network and then Ethernet.
- From the Ethernet screen, touch the edit symbol next to Mode.
- Select staticIP and touch OK.
- Touch the Pencil symbol next to IP Address and use the keypad to enter the IP address assigned to the Genius CED and then touch OK.*
- Configure your subnet mask, Gateway and DNS settings. ☐ Touch Apply.

Returning to the Genius idle screen: On the Menu path at the top of the screen, touch Home. Next, touch Run App.

- Numbers that are less than three digits in length must be entered using preceding zeros. For example: To enter the IP address 10.50.31.120 you must press 010 050 031 120.

SETUP SHIPRITE POS

Setting up ShipRite POS

1. Finally, go to the main menu of your ShipRite Program.   Click on SETUP: GENERAL SETUP: click on the OPTIONS tab.   Move ENABLE SMART SWIPER from the OFF side to the ON side.   Click SAVE.   Don't exit setup.

2. In setup, click on GLOBAL FEATURES, then click on PRINT ACCOUNT RECEIPT TOTAL.   Set it to however many receipts you want. Click Save and Exit when done.

SETUP SMARTSWIPER

Setting up Smart Swiper

3. Smart Swiper is the software that is used to communicate between ShipRite and Genius.   It is totally integrated with both. Download and then RUN this Smart Swiper setup file:
   http://support.shipritesoftware.com/PostNetFiles/SmartSwiperGenius Setup.exe   Follow the prompts to load the program.   Click FINISHED when done.

4. Start Smart Swiper from the Smart Swiper ICON on the desktop.   The security window will pop up immediately:

DEFAULT SECURITY CODE IS:

1

5. The Smart Swiper terminal is visible now:

Click the ADMIN button to open Setup.

Once the Admin window opens, click on "General Setup".
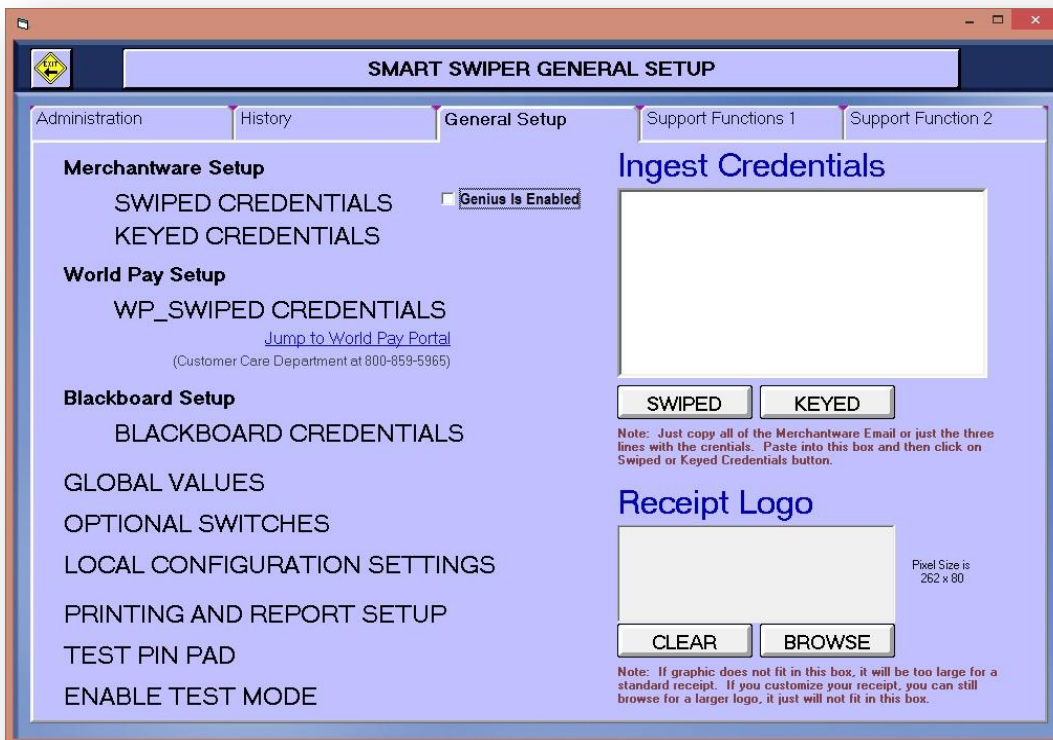
6. If you have your ORIGINAL CREDENTIALS Message, you can COPY the credentials and PASTE into the SWIPED CREDENTIALS form.

Name: POSTNET RA 324
**Site ID:** RNQPUC86
Key: 45T8X-BOE18-ESEQK-6OHLN-J6290J

Click on SWIPED CREDENTIALS: Copy and Paste or enter the credentials directly.   Click SAVE when done.
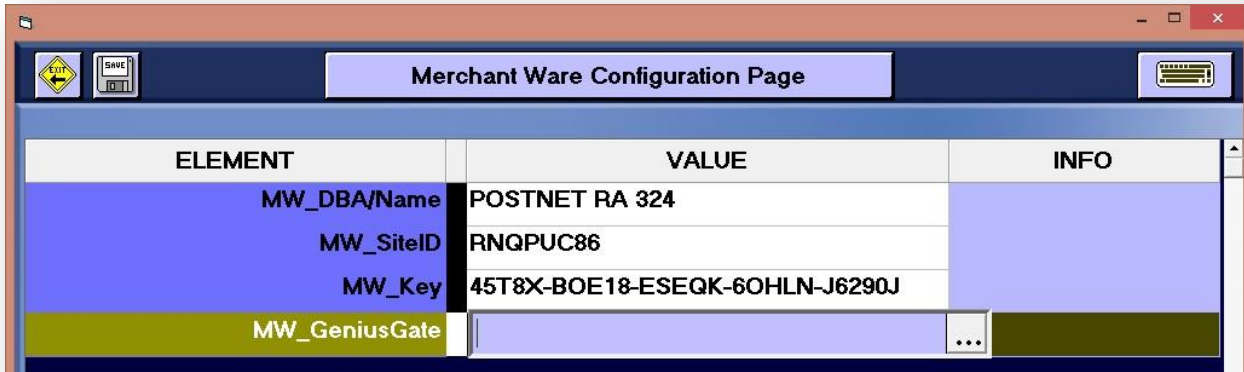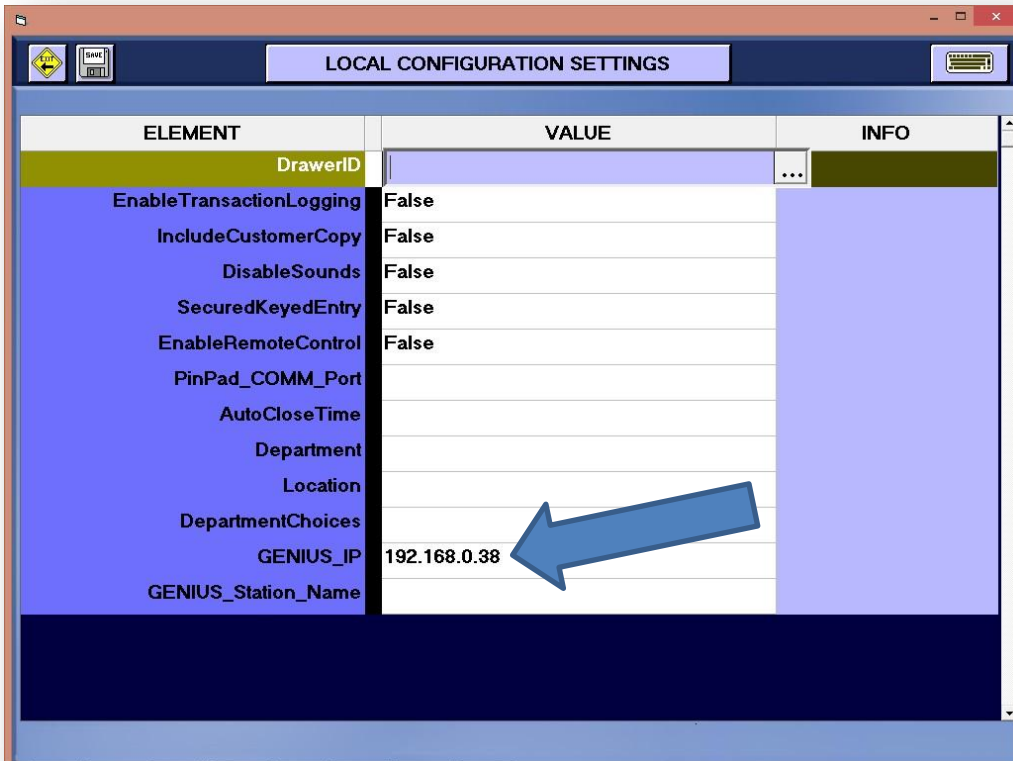

If you Cayan provided separate credentials for Keyed transactions, then select "KEYED CREDENTIALS" and enter those there.

Once finished, click SAVE then EXIT.
Exit back out to Administrative panel.   Put a check mark in GENIUS ENABLED.
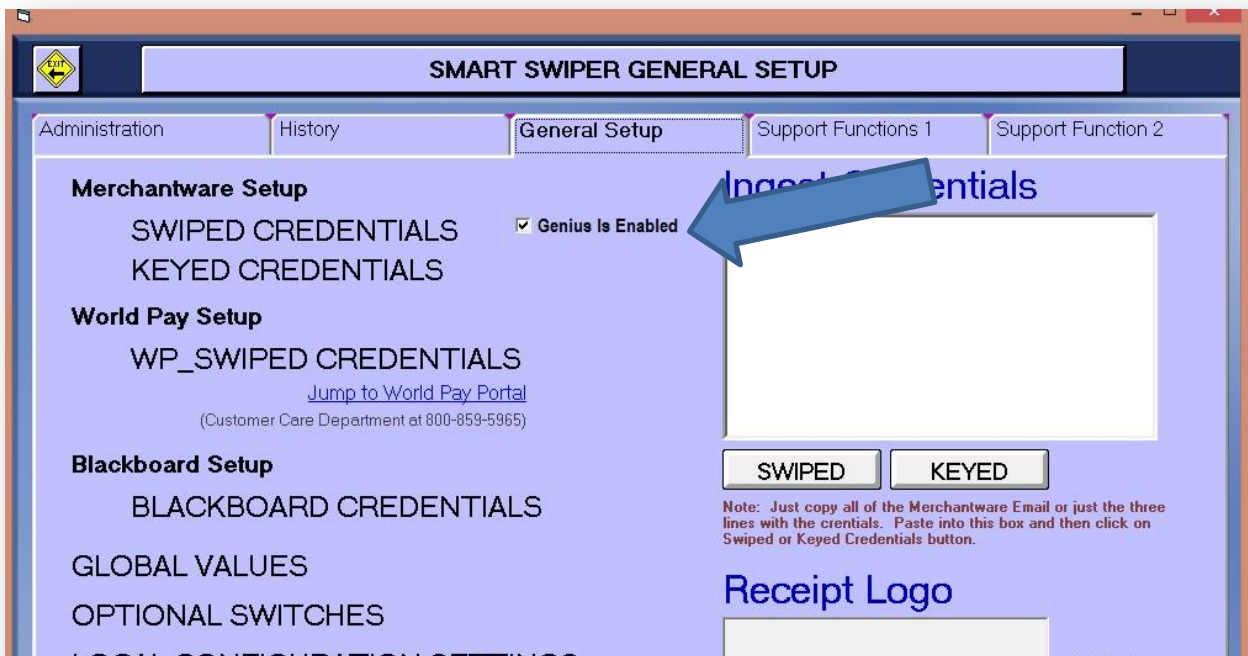
7. In local configuration, set the IP address of the Cyan terminal (you figured out the IP address on Page 1).

Set the ip address as seen above.   Click SAVE then EXIT.

8. Receipt Printer Setup: From the Smart Swiper General Setup Menu, click on Printer and Report Setup.   Press the space bar until the proper printer shows in the window.
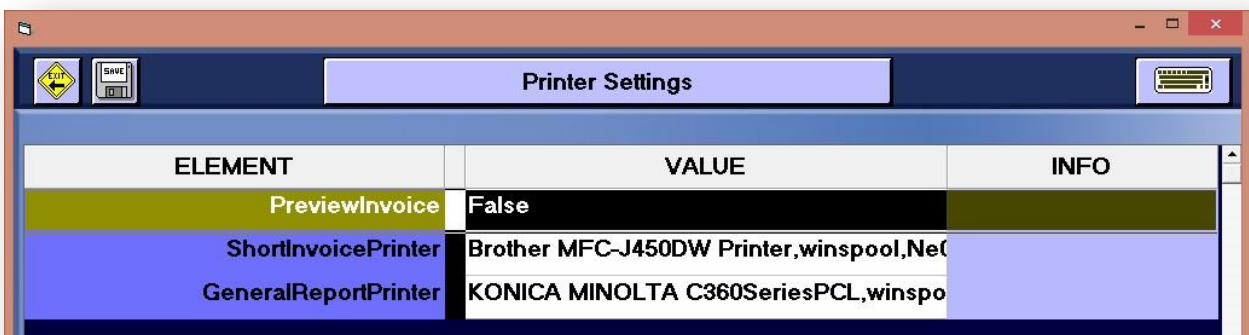

Click SAVE and Exit when done.

9. Now you will setup your receipt logo.   In the LOGO section on the bottom right, click on BROWSE. Look in the C:\shiprite folder for the file PNLOGO Receipt.jpg.   Click OPEN.
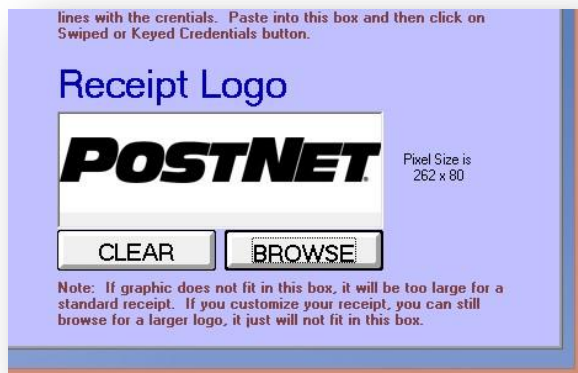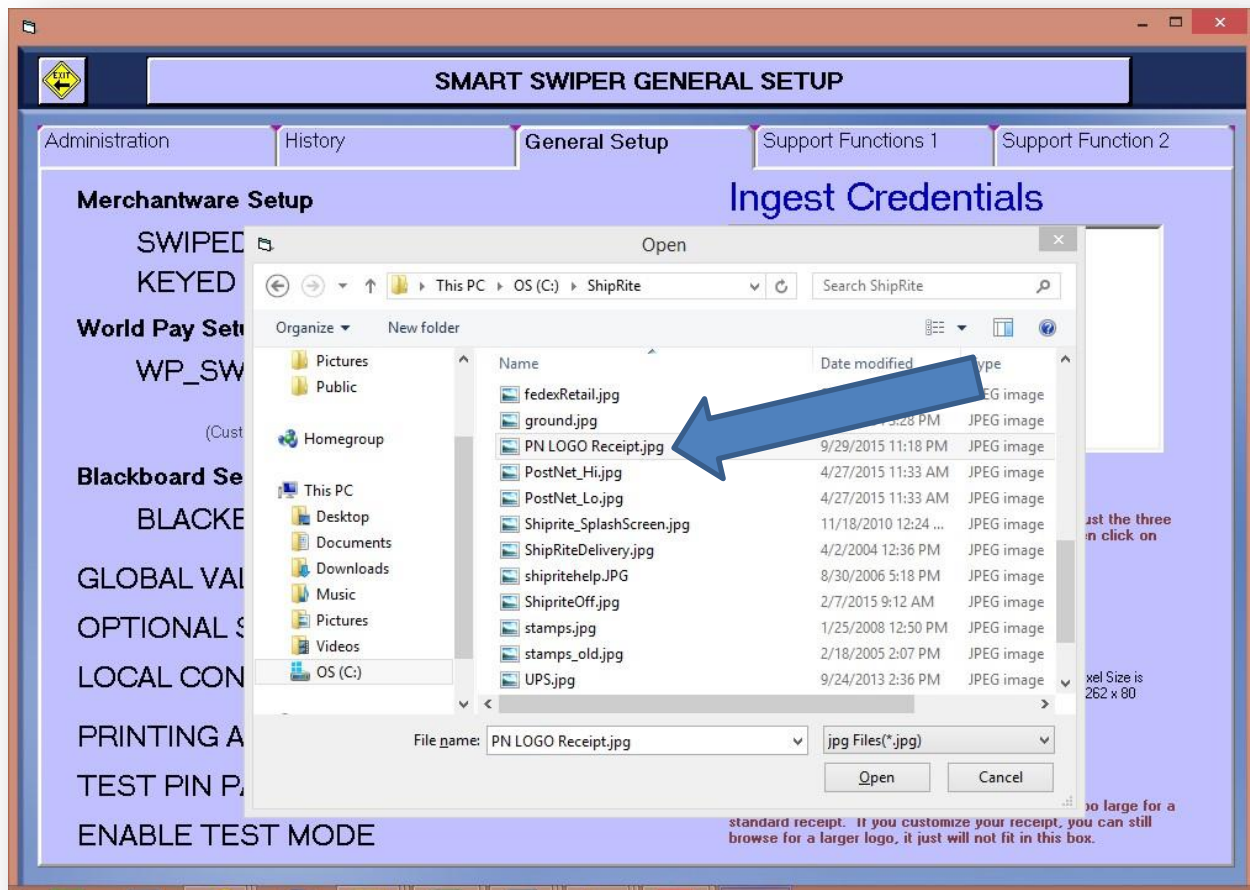
Go ahead and exit SmartSwiper.   Start ShipRite.   Go to the POINT OF SALE.   This is where all sales start and finish.   The next section covers how to sell and do refunds.

OPERATION:

ShipRite| Credit Card Processing via the Genius Terminal
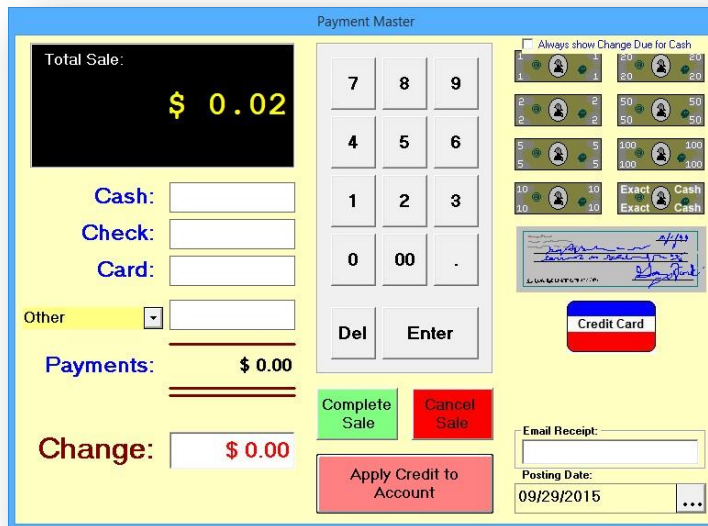
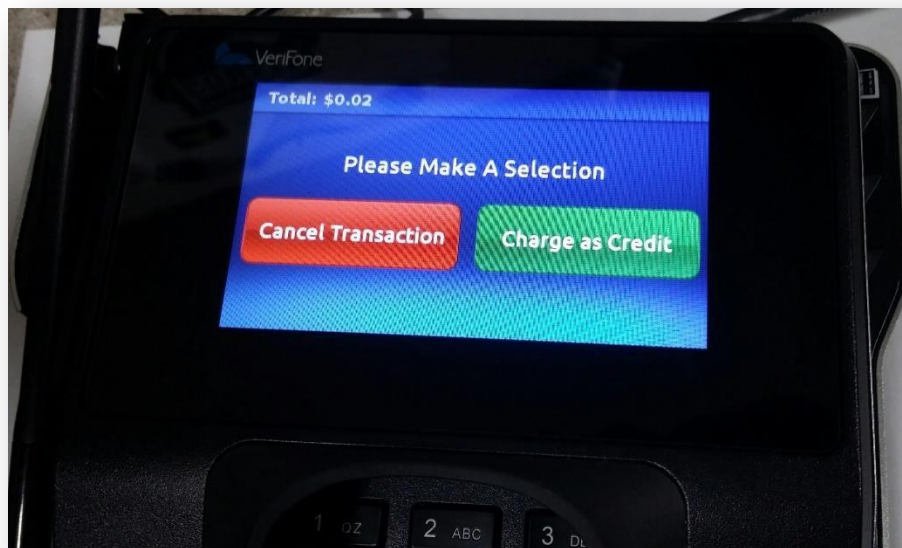- From the *Payment Master* screen, click the *Credit Card* button to process the credit card
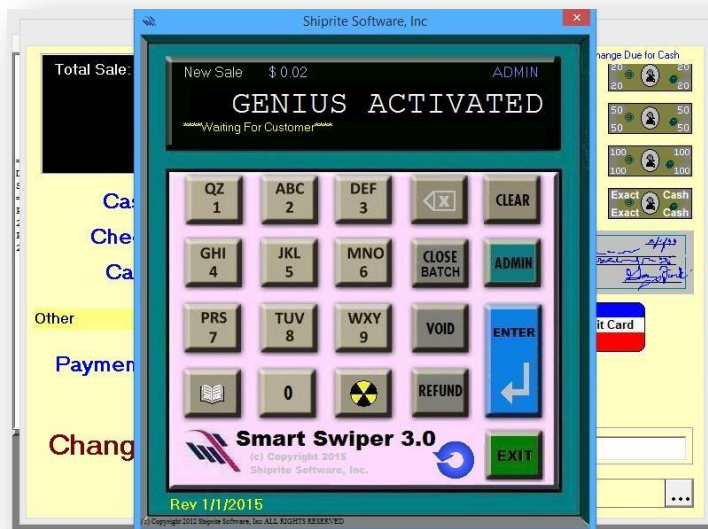
- The Smartswiper screen will now appear, stating "*Genius Activated*"
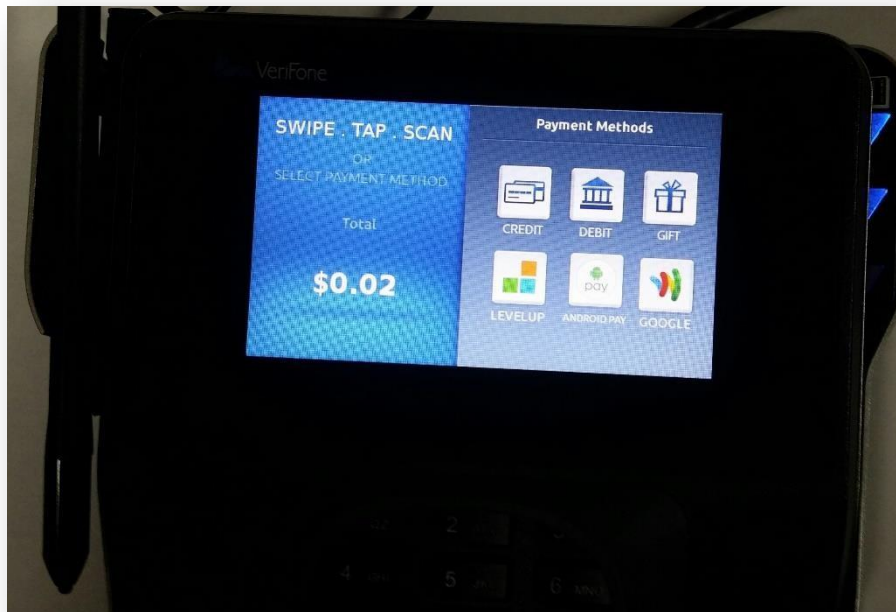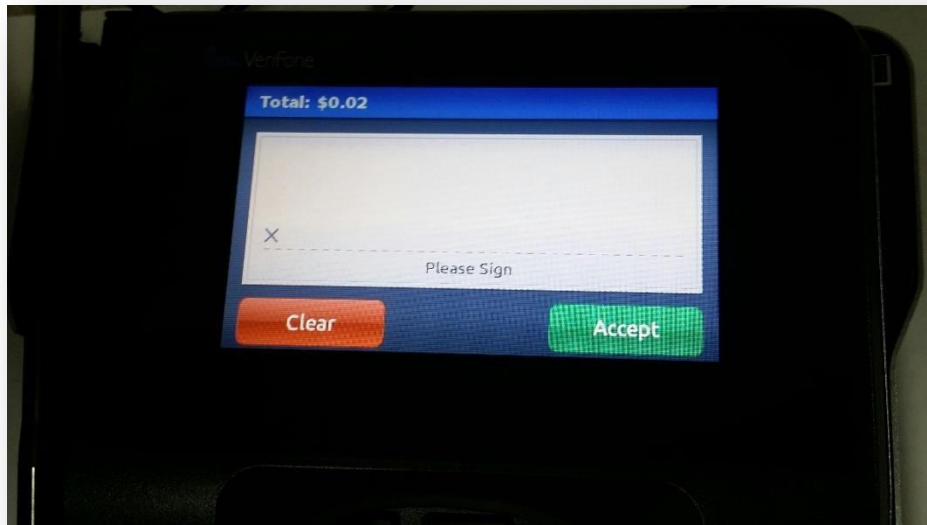
- Select *Credit* or *Debit* from the *Genius* terminal's screen

- If you select *Credit*, you will then see the screen above
- Click *Charge as Credit*

- Next, the signature screen will appear, prompting for the customer to sign
- Click *Accept* to finish the sale and produce a receipt for the customer

ShipRite| Processing a Keyed Transaction

You must first ensure that you followed the instructions in SETUP where you entered your KEYED CREDENTIALS.
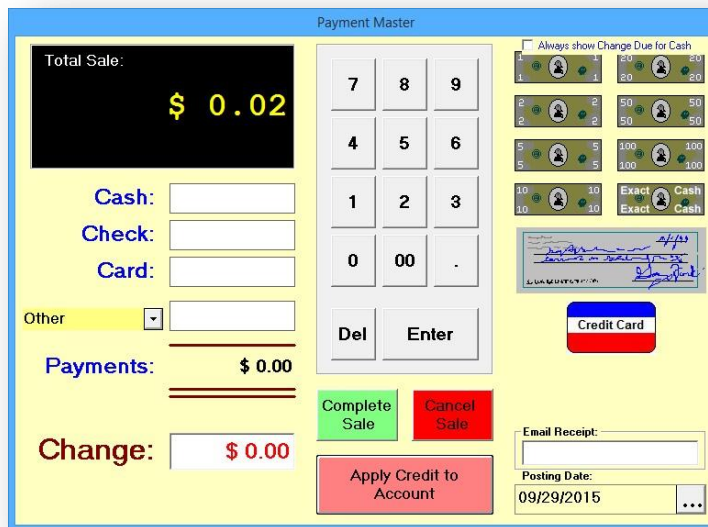
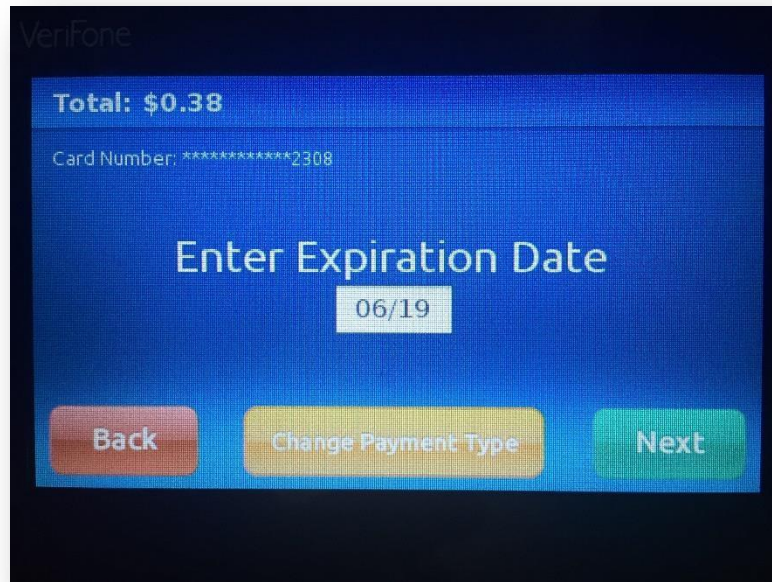- From the *Payment Master* screen, click the *Credit Card* button to process the credit card
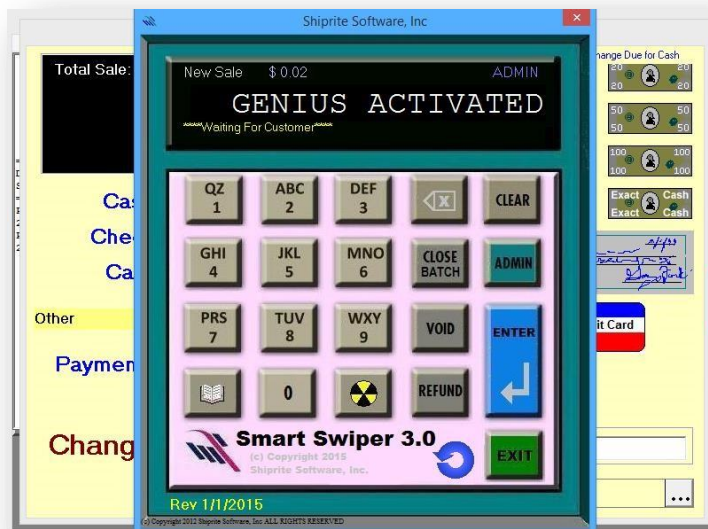
- The Smartswiper screen will now appear, stating "*Genius Activated*"
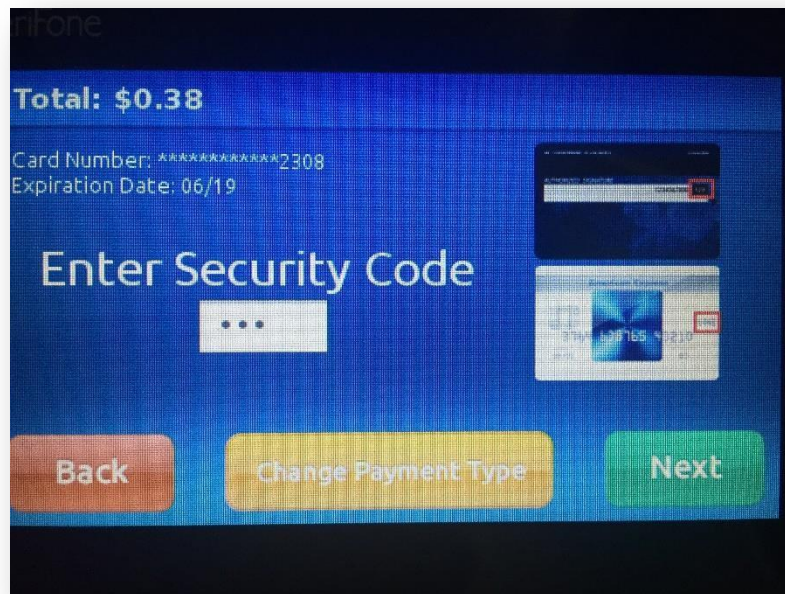- Click the *CLEAR* button on the Smartswiper interface

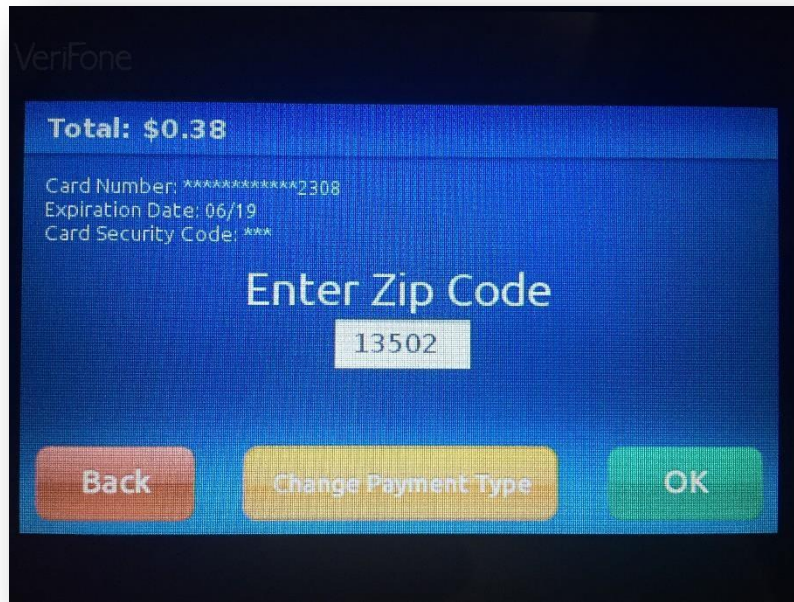- Click *Yes* to begin entering in the *Keyed* card information
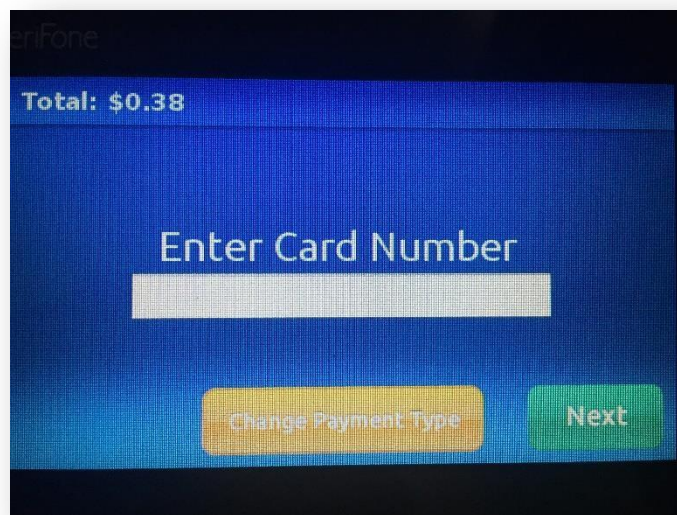
- Enter the card number, then click *Next*

- Enter the card's expiration date

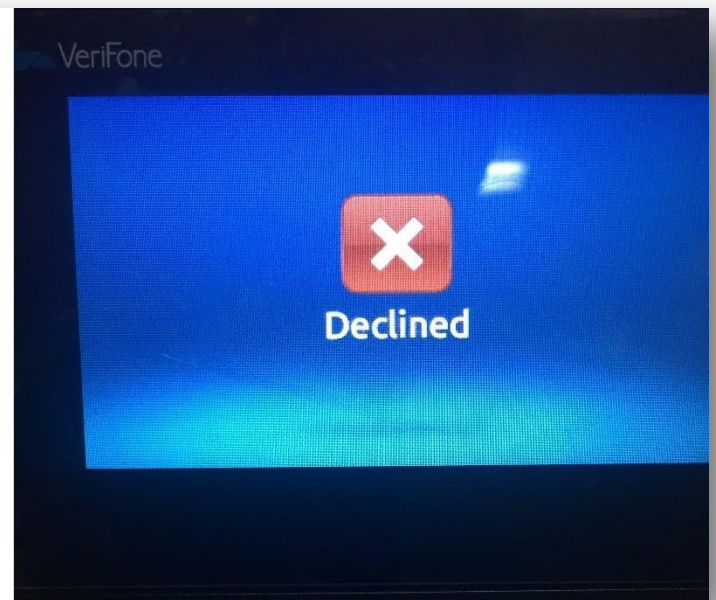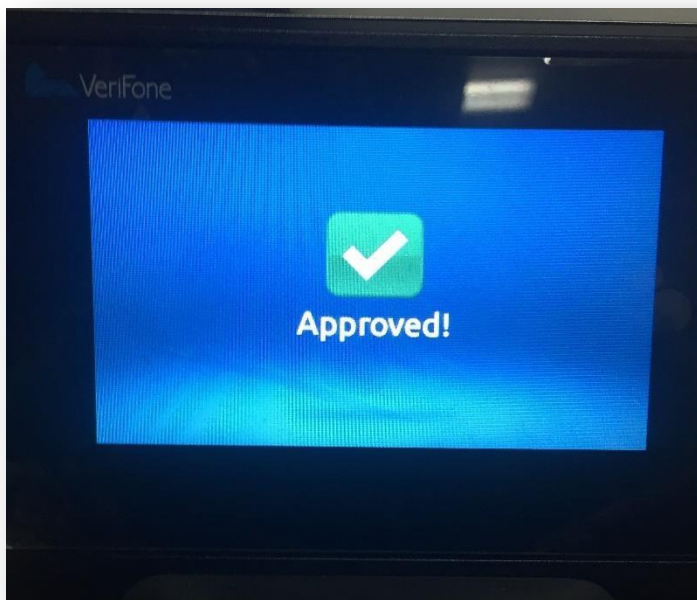- Enter the card's security code or *CVV2* code, then click *Next*

- Enter in the *zip-code* of the customer, then click *OK*
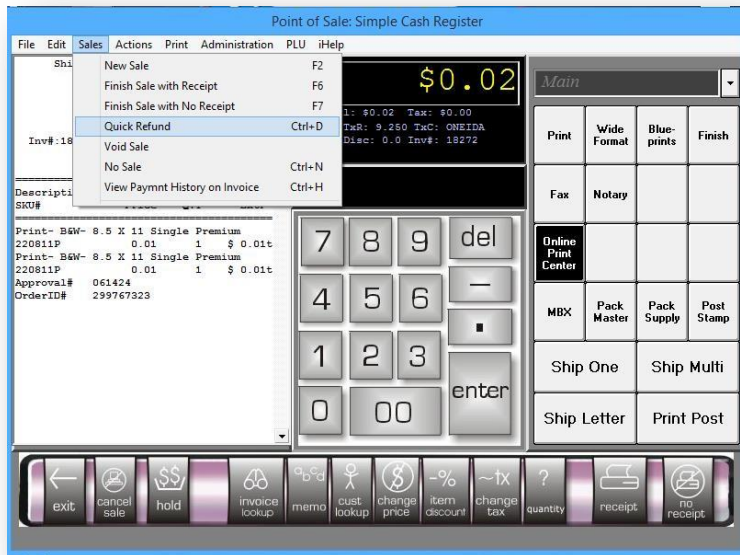
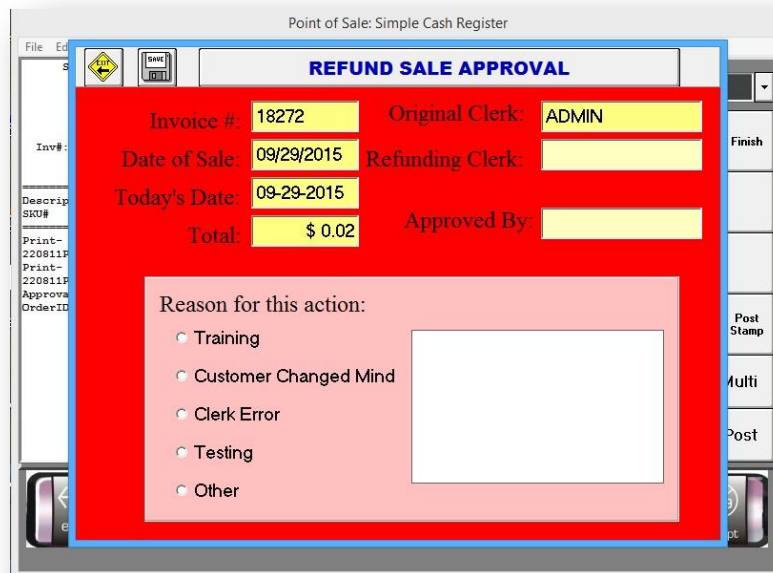*Approval Image*   *Declined Image*

- ShipRite will now return back to the POS and produce a receipt for the customer

# ShipRite | Processing a refund via the Genius Terminal

- First, pull up the invoice via the *Invoice Lookup* button at the bottom of the POS
- Next, click *Sales > Quick Refund*, as seen in the above image

- Enter the *Refunding Clerk's* ShipRite security code, the manager's *Approval* code, and then provide a reason for the refund
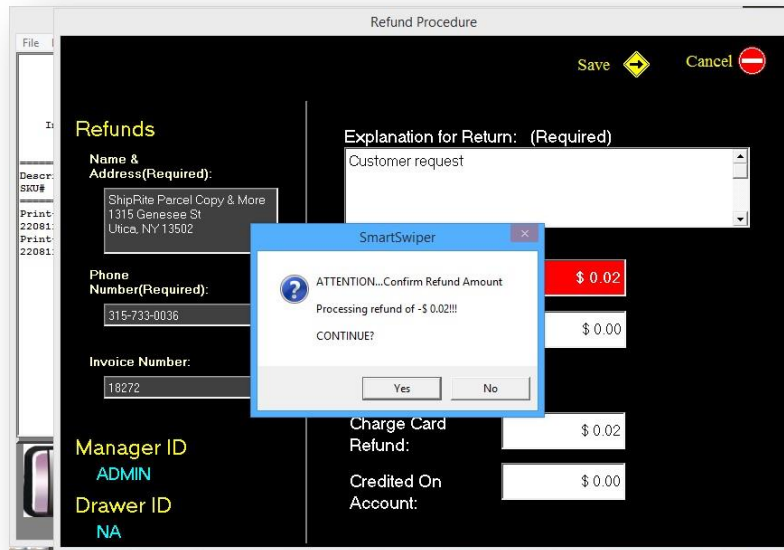
- On the *Refund Procedure* screen, verify that the information is correct and then click *Yes* to continue
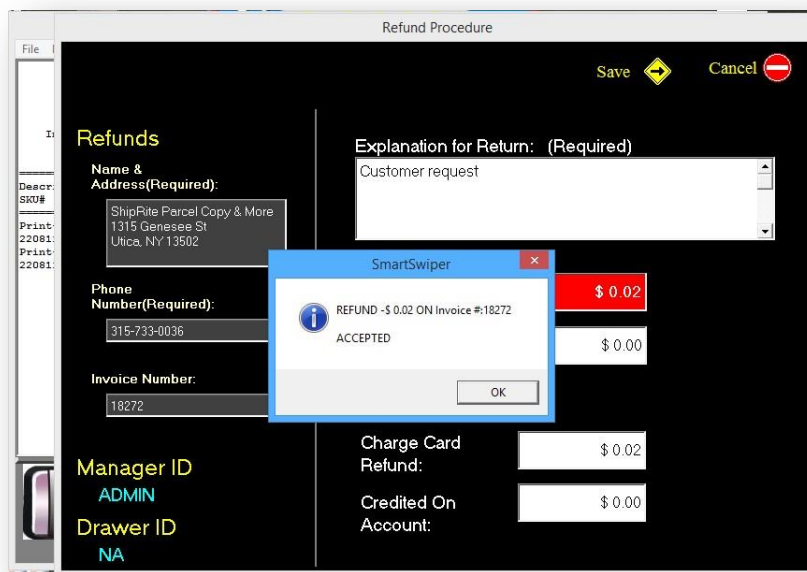
- Lastly, you will see the *Accepted* message, as seen above, and a refund receipt will print out to provide to the customer

ShipRite| Switch to the Virtual Terminal

Occasionally it may be necessary to use the Cayan Virtual Terminal. This allows you to perform all duties including sales, refunds and search for history.

Click on the CIRCLE icon to toggle into the VIRTUAL TERMINAL.

You can run charge cards here as well as check history, do voids and refunds.
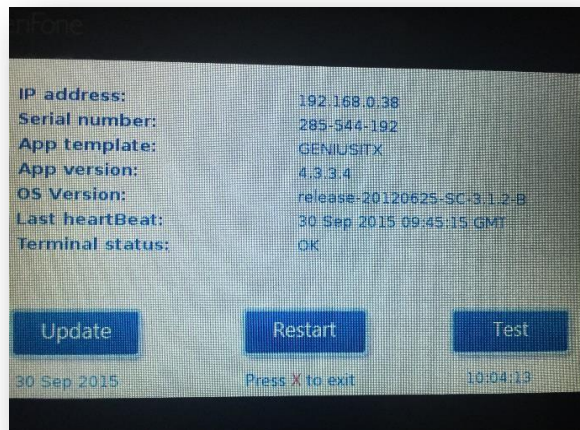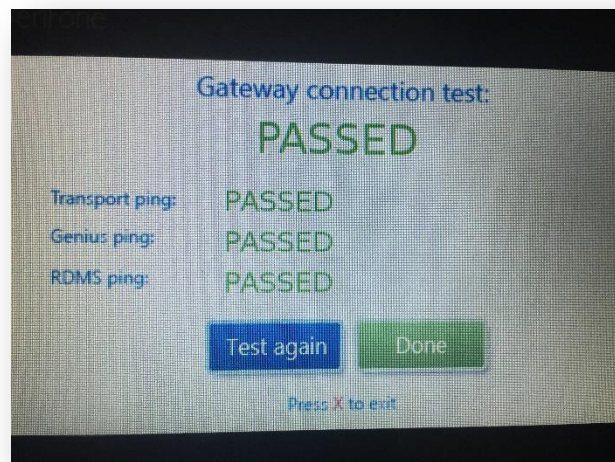
ShipRite| Troubleshooting

Getting the IP address of the terminal

- With power on, hit the '0' key 3 times. This will get you into the admin panel.
- Password is 9416557 (Cyan's phone number).
- Look for and record the IP address. You will need this to configure Smart Swiper.

Testing connectivity

- Look for the "TEST" button on the devices screen and touch it.
- If it says "Passed" you are good to go. If it fails, the maintenance procedure will need to be done to re-initialize the device.

To go back, click on the 'X' button