ShipRite® HOT FIX for Version 10.17.3
Instructions & Fixes

If you have already performed the update to ver 17.3, then you only need run this patch.   You do NOT have to run the update 17.3 again by clicking on the PROGRAM UPDATE button in the END OF DAY.   <<<<PERFORM 17.3 HOT FIX>>>> Then skip to section A below.

If you did NOT update to 17.3 yet, then you only need to READ about these improvements below, then perform the 17.3 update sent to you by email. If you do not have it, then go to our web site: www.shipritesoftware.com/updates. The HOT FIX 17.3 IS INCLUDED in the update now.

A. These items are part of the 10.17.3 HOT FIX

- Fix: [Startup] Special Update added to remove Vault Tokens from AR accounts that were automatically saved.
- Fix: [Payment] Added 'Credit Card On Account' button to pay via CC stored in Vault on account.
- Fix: [Payment] Don't automatically store CC to account/Cayan Vault when making CC payment via Cayan.
- Fix: [POS] Pressing <Enter> in empty search textbox in Simple Cash Register shows search form with no inventory listed.
- Fix: [Net.EndiciaWeb] Endicia ELS SCANRequest, RefundRequest, PackageStatusRequest web services updated.

B. New Features:

Below are changes to the instructions on using the CAYAN VAULT.   These instruction changes are part of the HOT PATCH 17.3.

1 Process stored credit cards using Cayan Vault.
ShipRite has now the ability to process stored credit card information using Cayan's Vault system. The credit card info is encrypted and stored within Cayan's Vault. ShipRite uses a token

provided by Cayan to perform the sale and charge the credit card.

This feature can only be setup for customers that have AR accounts within ShipRite. A credit card sale has to be processed at least once for that account in order to store the credit card to the vault.

Please note, the Vault at this time can only store Credit Cards and will not work with Debit Cards (even those with a credit card symbol on them).

Setting up Credit Card Vault for an existing Account
From the main ShipRite screen go to Actions > Accounts Receivables. Double click in the account name field and pull up the account. Click on the Miscellaneous tab. If the customer has a card on file, the "Credit Card Vault" section will display the credit card info.

If the fields are empty, press the "Get Last Token" button and the software will find the last credit card that was processed for the selected account and store it in the vault for future transactions. The last for digits and expiration date fields will populate.

Click SAVE in the top left corner. Vault for that account is now set up.

Please Note: A lot of centers do not have SmartSwiper Networked, which means that SmartSwiper is setup as a standalone program on each station. If that is the case, the "Get Last Token" button will only be able to find tokens for transactions done on that workstation.

To check if SmartSwiper is networked on a workstation, click on the Windows Start Menu and type in: smartswiper.ini
Press Enter and a notepad file will open. If the DataPath reads "C:\smartswiper\data", then SmartSwiper is running locally on that computer. If instead of the "C" drive it reads the networked drive that is pointing to the server, then it is networked.

If it's not networked, then try pulling up the AR account on another POS and click the "Get Last Token" button there.

To remove a credit card token from the vault. Simply press the "Remove from Vault" button.

Manual entry of Reference ID

If the "Get Last Token" button is not able to obtain the ReferenceID then it can be manually entered.

A ReferenceID from a previous sale can be manually entered in the "Reference ID:" field. Type in the ReferenceID and click the "Add to Vault" button.

The last 4 digits of the card and expiration date must automatically populate. Once that information is present it means that the token was obtained successfully. Press SAVE in the top left corner.

How To obtain the Reference ID:
With the AR account pulled up, open the "Account Ledger" tab. On the list of invoices in the ledger find a credit card invoice and double click on it to pull it up in the POS.

On the bottom of the receipt, find the Reference ID and write it down.

Exit POS and go back to the AR account, Miscellaneous tab. Enter in the Reference ID in the proper field and press the "Add to Vault" button.

If previously the credit card was only stored and processed directly on the Cayan virtual terminal, and not within ShipRite, then the reference ID of a transaction can be obtained directly from your Cayan online portal. https://cayan.accessaccountdetails.com/sign-in/

Note: The reference ID cannot be from a debit card transaction. A "Validation failure, invalid transaction reference" error will occur if the entered reference ID is linked to a debit card transaction.

Setting up Vault for a new credit card
A new sale needs to be processed for the AR account and completed with a credit card payment, if one of the following conditions apply:

- No previous credit card transactions exist for the customer
- The "Get Last Token" button is not able to obtain the info from the last transaction, and no ReferenceID can be found.
- This is a new account

Go to POS > Customer Lookup. Pull up a contact with an AR account into POS. Ring up item(s) in POS. Complete sale and pay with a credit card. A token will be automatically stored in Cayan Vault upon successful CC processing. The credit card info will now be visible in the Credit Card Vault section of the Miscellaneous tab of the AR screen.
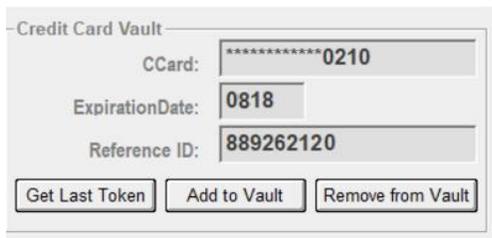
Applying Vault payment to a sale
Go to POS > Customer Lookup. Pull up a contact with an AR account (that has vault setup) into POS. Ring up item(s), press Receipt. In the payment screen press the credit card button. If vault is setup, ShipRite will prompt to use the credit card on file.

Total Sale:

$ 0.38

Cash:
Check:
Card:
Other
Payments: $ 0.00
Change: $ 0.00
Email Receipt:
Posting Date: 11/17/2017

7 8 9
4 5 6
1 2 3
0 00 .
Del Enter

COMPLETE SALE
or CHARGE to Acct

Credit Card
On Account

CANCEL SALE

Apply Credit to Account

New payment option

Payment Master

SmartSwiper

ATTENTION...The Account attached to this customer has a Credit Card (************1190) stored in the Cayan Vault.

Would you like to like to make a payment of $ 0.76 using the Account's scored Credit Card???

Select 'Yes' to use the Credit Card on file.
Select 'No' to process a Credit Card normally.

Yes   No

Pressing YES will use the stored credit card to process the sale. Pressing NO will ignore the stored credit card and allow the clerk to process the sale normally with the credit card that is present.

The vault credit card can also be used when applying a bulk credit card payment on account.

2. AutoPay option for Accounts Receivable
ShipRite can now be setup to automatically process payments for AR accounts that have vault setup. On a specific day of each month ShipRite can automatically process a payment for the current statement balance of the account.

To setup the AutoPay option, from the main ShipRite screen go to Actions > Accounts Receivables. Double click in the account name field and pull up the account. Click on the Statements tab. On the right-hand side toggle the "Auto-Pay Balance" option to ON.

Next, on the top menu click on Actions > Set Day of Month for Auto Payments. Enter which day of the month the automatic processing of payments should take place. (This setting applies to all accounts, not just the currently selected one)

On that day, each month, the software will automatically charge the credit cards from the vault for the current statement balance.

Important – Declined Transactions!
On the day the AutoPay transactions are processed, in the POS go to Print > Vault Report to get a report of all AutoPay transactions. The report will display any declined transactions.

> **NOTICE:**   After setting up your tokens in the vault, you should IMMEDIATELY check the Cayan portal after the first several auto charges to make sure they went through.   You must also check your BATCHES the next morning to make sure they match your expectations.

3. Ability to change AR Account Numbers

To change the account number of an AR Account, go to Actions > Accounts Receivables. Double click in the account name field and pull up the account. Once the account is pulled up, on the top menu go to Actions > Change Account Number. A new window will display where the new account number can be entered. Press OK when done.

4. Ability to edit the email subject and text of AR and MBX statement emails

Go to Setup > General Setup Options > Global Features tab > FORM - Email Setup > "Subject" drop down menu.
- "Your Statement is Attached" is for AR statements,
- "Your Mailbox Statements is Attached" is for Mailbox notices.
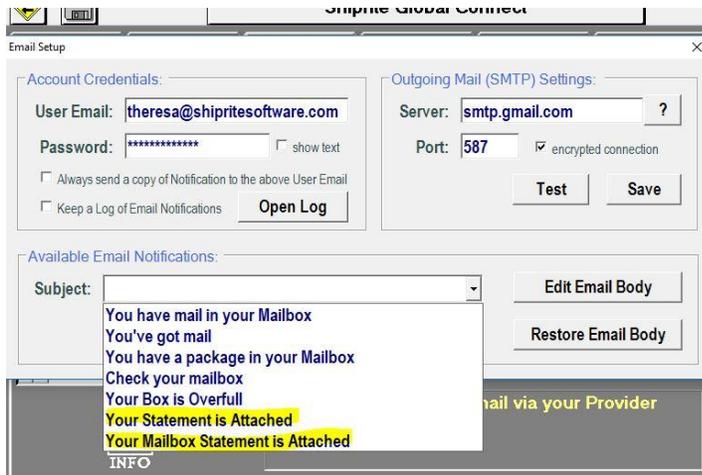
Select one of the option and press the "Edit Email Body" button to edit the email text. Don't edit the items enclosed in the %signs% as those will pull data from your database. When done editing be sure to save the document before closing.

To change the subject, simply edit the subject text right in the drop down menu and press the "Update Subject" button.

Fixes Included in Update version 17.3

Type	Module	Description
New	Net.FedExHAL	FedEx ScanPostingService web service wsdl updated to v3.
New	Reports	Departmental Chargeback Report added.
New	POS	Departmental Chargeback Report added.

New	AR	Change Account Number menu option added to allow user to change account# of an account in AR form.
Fix	Net.MailBox	Proof of Delivery' call is required for NONE MAILBOX HOLDERS as well.
Fix	Net.ShipRiteReports	Drop Off Compensation report column fields expanded.
Fix	UPS	PostNet-CanadaOrigin: Errors will show when calculating 1DAYEAM service shipping cost.
Fix	Net.MailBox	Proof of Delivery' report signature location fix.
Fix	Net.ShipRiteReports	Proof of Delivery' report signature location fix.
Fix	POS	Reprinted receipt of non-ar customer shows store name on receipt instead of customer name.
New	Purolator_Zones.mdb	BeyondListCodeLookup updated with Q4 Beyond Point list effective 10/1/2017.
Fix	AR	Deleting account will fail if there are records with Status = 'Deleted' with a balance.
Fix	Inhouse	Special Update to 'Fix Converted Cash Sales' shouldn't process deleted cash sales.
Fix	Inhouse	One-time update added to correct 'fixed' deleted cash sales records added by the 'Fixing Converted Cash Sales' special update.
Fix	Inhouse	At startup, file datetime comparison of srpro.exe needs to use UTC time to prevent issues where time zone set on server is different from client.
Fix	ProgramSetup	Saved On/Off options in Global Features > "SETUP - Printed Shipping Receipt" aren't read properly from the database.
Fix	Reports	Z-Report title should include "Consolidated" if user selects CloseID(s) and "Datewise" if not.
Fix	Net.FedExHAL	Refused Package' should have 'Refused' tag in ProofOfDelivery call.
Fix	Net.MailBox	RTH (Redirect to Hold) packages will be treated as HAL ones if FedEx HAL checkbox is checked.
New	Net.MailBox	Customer Refused' button was added to Pickup screen.
Fix	Inhouse	PostNet: One-time update added to correct FedEx Canada Gnd service carrier discount to 12%.
Fix	DHL	DHL letter should apply 1 lb rate if weight greater than .6 lb.
New	Purolator	Purolator Oversized package fees added.
Fix	Payment	If "User Accounts" user option is disabled then user shouldn't be able to add account in Payment form after pressing "Complete Sale".
Fix	AR	Account Name and Account Billing Name textboxes should have character limit of 30.
Fix	AR	Remove inhouse "CASH" account from account lookup searches.
Fix	Search	Remove inhouse "CASH" account from account lookup searches.
Fix	UPS	PostNet: UPS discount should be 1/2 original discount for packages shipped from US 48 to AK, HI, or PR.
Fix	POS	Refunds for contact don't show in Invoice Lookup when specific contact pulled up in POS.
New	Inventory.upd	PostNet: US Inventory updates.
New	Inventory.upd	PostNet: CA Inventory updates.
Fix	Net.UPSWeb	HI Origin: Shipping Oahu Ground returns service code error.
Fix	Net.UPSWeb	Can Origin: Shipping Domestic, USA returns service code error.
Fix	Net.ShipRiteReports	Quote report Dept, Description, Memo columns get cut off when too long.

New	PackageDetails	UPS Extra Surcharges will be added at holiday season.
New	Master	UPS Extra Surcharges will be added at holiday season.
New	UPS	UPS Extra Surcharges will be added at holiday season.
New	UPS	UPS Extra Surcharges will be stored in UPS Services database.
New	Master	First Class Mail grid is used for UPS Holiday Surcharges also.
New	FedEx	FedEx Extra Surcharges will be added at holiday season.
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New	FedEx	FedEx Extra Surcharges will be stored in FedEx Services database.
New	Master	First Class Mail grid is used for FedEx Holiday Surcharges also.
New	Net.Email	Add the ability to edit the email subject and body used for AR and MBX statement emails.
New	AR	Add the ability to edit the email subject and body used for AR and MBX statement emails.
New	MailBox	Add the ability to edit the email subject and body used for AR and MBX statement emails.
New	SMTPSetup	.rtf files added for AR and MBX statement emails to be customized for notifications.
New	Payment	If account contact selected and making CC payment via Cayan, store CC to account/Cayan Vault.
New	AR	AutoPay option added to Statements frame to use a stored Cayan Vault credit card to autopay on account monthly.
New	AR	Credit Card Vault panel added to Misc frame to view stored Cayan CC info & get Cayan Vault token using previous Cayan CC Reference ID.
New	POS	Print > Vault Report menu option added.
New	Reports	Cayan Vault Report added.
New	AR	Menu option added under Edit to set day of month to process auto payments.
New	Inhouse	Process monthly auto payments on accounts at startup on the set day of month.
New	Payment	Option added to use Cayan Vault CC stored on selected account when making CC payment via Cayan.
Fix	Net.ShipRiteReports	Inventory Listing report should show active inventory items only.
Fix	Startup	Special Update added to remove Vault Tokens from AR accounts that were automatically saved.
Fix	Payment	Added 'Credit Card On Account' button to pay via CC stored in Vault on account.
Fix	Payment	Don't automatically store CC to account/Cayan Vault when making CC payment via Cayan.
Fix	POS	Pressing <Enter> in empty search textbox in Simple Cash Register shows search form with no inventory listed.
Fix	Net.EndiciaWeb	Endicia ELS SCAN Request, RefundRequest, PackageStatusRequest web services updated.
Fix		