



www.shiprite.net

info@shipritesoftware.com

ShipRite Update 10.17.2

Time to Download: **25-40 Seconds.** Time to apply update: **4-15 minutes** depending on database size. It is recommended you download this at the end of day, and not as you arrive for work, unless you get to the center at least 1 hour ahead of time.

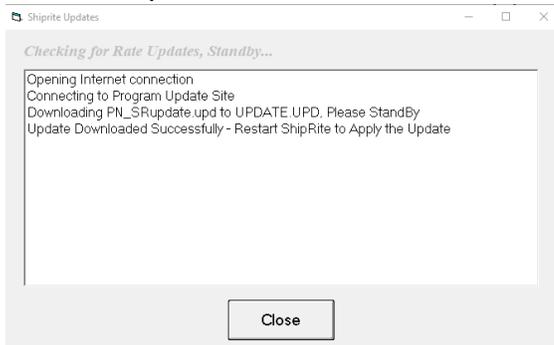
To LOAD the UPDATE

1. Backup your ShipRite database. You should be backing up DAILY. If you are not, please go to www.shipritesoftware.com/FAQS and download, then apply the backup procedure.
2. The update has to be done on the server computer with ShipRite closed on all other workstations.
3. On the Server, from the main ShipRite screen click on the EOD button. In the top right corner click on the Program Updates button.



4. A ShipRite Updates status screen will display with information that the update is being downloaded. Depending on internet speed, this can take a few minutes to complete.

When done, a message will display informing that the Update Downloaded Successfully. Close the Screen and close out ShipRite completely.



5. After closing ShipRite, open it right back up from the desktop shortcut. During the initial startup, a message will appear informing that the Program Update has been located. Click YES to install the update.

Follow any prompts on the screen to complete the update installation including the installation of the ShipRiteNet 3.5 module. Close when done.

6. After the installation is completed, start ShipRite back up from your normal icon. The first time ShipRite is started up, the software will go through a lengthy loading procedure. This is normal.

You may get a RUN TIME error that says database update failure. Click OK and ignore it, then restart the program. The second restart will clear the error message. You should then get a message saying DATABASE UPDATED WITH XX NEW DATA FIELDS. There is no correct number on how many fields are added to the database.

The update is now completed. Please scroll down to the What's New section for description of changes and new features.

In case that the Program Update button fails to download the update

It's possible that a firewall or anti-virus software blocks the Program update from being downloaded. If that is the case follow these instructions:

1. Backup your ShipRite database. You should be backing up DAILY. If you are not, please go to www.shipritesoftware.com/FAQS and download, then apply the backup procedure.
2. Click <<HERE>> to download the update.
3. SAVE to your desktop. Double click on the file name: Update_10.17.2.exe
4. Click NEXT to start the loading process, then FINISH to finish the installation.
5. Next you will receive a message that the ShipRite Dot Net 3.5 needs to update. Go ahead and click YES and continue until done. Click CLOSE when done.
6. Start the ShipRite Program from the normal icon. You will get a message that X number of Database fields were added. This is normal. You will be required to restart the program again.

Once the ShipRite Main Menu screen pops up, you are updated.

What's New:

1. Emailing of AR Statements

This update includes the capability to automatically email account statements to AR customers.

In order for this function to work, email capability has to be setup in ShipRite. If email is already setup and the existing email features (such as emailing POS receipts, tracking numbers, and/or package and mail receiving notifications, etc.) are already being used, then no setup needs to be done.

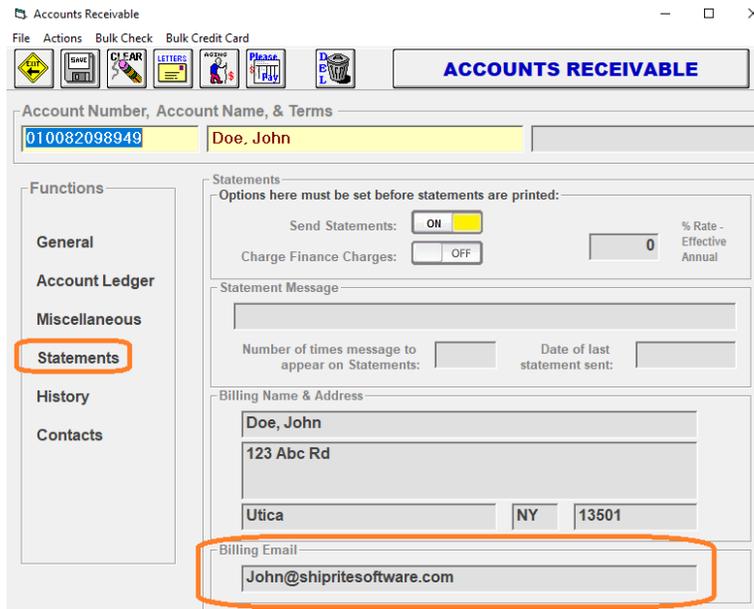
Otherwise, go to Setup > General Setup Options > Global Features > FORM - Email Setup, and enter in your email server configuration and log in credentials.

Emailing statements is processed in the exact same way as printing statements. The AR screen can be accessed from the main ShipRite screen by going to Actions > Accounts Receivables. There, click the "Please Pay" button to open the Statement Processing screen and process statements for all accounts that have a balance.

Alternatively, a specific account can be pulled up first, then click on the "Please Pay" button to process a statement just for that account.

The process of emailing the statements works exactly the same as when printing statements. Make the selection of Statement begin, end, statement, and due dates; select the format report option with the amount of details needed on the statement, then press the Email button. All generated statements will get emailed to AR accounts that have an email address saved in the Statements tab of the AR screen in the Billing Email field.

If some accounts are missing email addresses, go to Actions > Accounts Receivables, lookup the account and select the Statements tab on the left. Find the account's billing email there and add/verify the email address. Press Save on top to save changes.

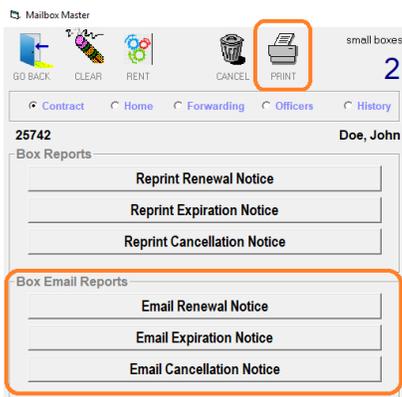


2. Emailing of Mailbox notices

Mailbox renewal, expiration, and cancellation notices can now be emailed directly to the customer either individually or in bulk.

From the main ShipRite screen go to Actions > Mailbox Manager. The last option is the “Bulk Email Notices” function. After selecting it, 3 buttons will display giving the option to email either the renewal, expiration, or cancellation notices in bulk.

To email an individual notice, select a specific mailbox on the right-hand side, then click the Print button on the top. Below the Reprint notice functions, the Email Notice options are now present. These will email the selected notice to just that box holder.



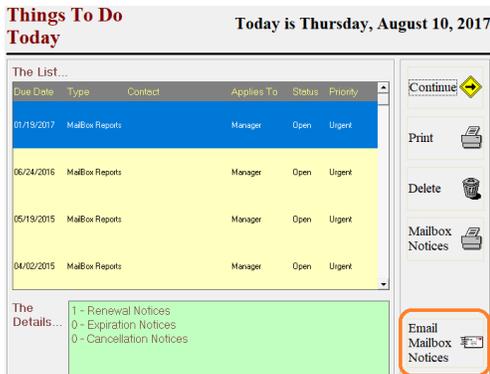
In order for these email functions to work, an email address has to be associated with the main mailbox holder. If there is no email address present, then go to POS > Customer Lookup. Find the mailbox holder there, add their email address, and click Save.

To setup the time periods for which boxes to generate the notices for, go to Actions > Table Management >

Mailbox Setup. In that screen edit the 3 fields for the days to print Renewal, Expiration, and Cancellation. Then enter in the number of days when to print the notices.

For example, entering -14 in the “Days to Print Renewal” means that at the earliest the renewal notice will generate 14 days before the box expires.

If entering 25 for the “Days to Print Cancellation”, then at the earliest the cancellation notice will generate 25 days after the box expires.



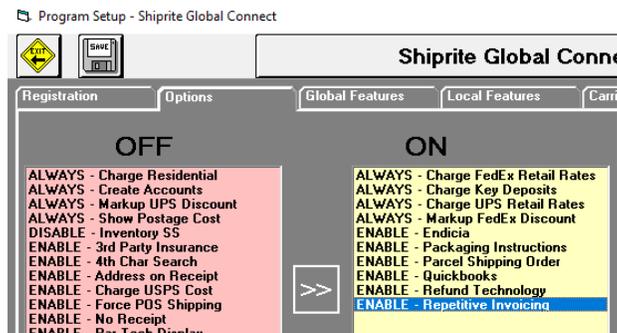
The email option will also appear in the Tickler that displays at the start of the day:

3. Scheduled Invoices for AR Accounts.

ShipRite can now automatically generate repetitive invoices every month and automatically apply credit card payments to those invoices.

This feature functions by selecting a completed invoice and setting up the repetitive invoicing for the exact same invoice. This invoice will repeat each month at a set date over a certain period of time.

To enable the Repetitive Invoicing, go to Setup > General Setup Options > Options > “ENABLE – Repetitive Invoicing”. Turn that option ON, then click Save and Exit.



Please continue under section A or section B depending if you need to automatically apply a credit card payment to the repetitive invoice.

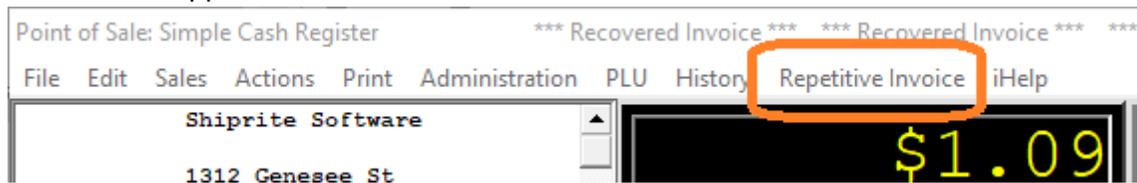
A. Set up repetitive invoice and charge it to an AR account

B. Setup repetitive invoice and automatically run a stored credit card to apply payment to it.

A. Setting Up Repetitive Invoices without automatic payment.

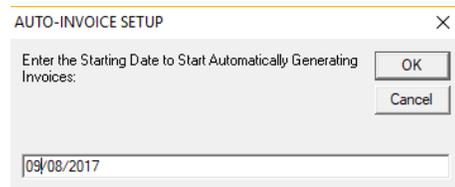
To setup this function, go to the POS, click on Customer Lookup and pull up the customer (the customer has to have an AR account). Now create the invoice by ringing in the needed SKU's. Click Receipt to open the payment screen and click the "Complete Sale" button to charge the invoice to the account (do not take any payment at this time).

Once the sale is completed, click on the Invoice Lookup button and double click on the just created invoice to view it in the POS. On the top menu, an option for "Repetitive Invoice" will appear.

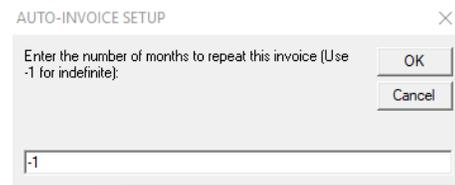


Once that option is clicked a message will display informing you that a repetitive invoice is being setup. Click "YES" to proceed.

The next message will prompt to enter the date to start automatically generating the selected invoice.

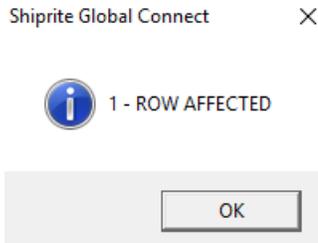


On the selected date, an exact copy of the currently selected invoice will get created. Click OK to proceed.



In the following message box enter in the number of months to repeat the invoice. Enter in -1 to keep repeating the invoice indefinitely.

The final pop up message will confirm that the repetitive invoicing has been set up. Click OK. The Invoice will remain displayed in the POS. Do not close it out yet, check the instructions below to apply payment.



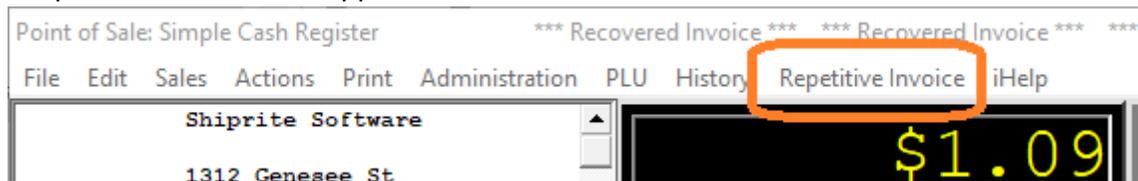
B. Setting up repetitive invoices with automatic credit card payment

The automatic credit card payment only works if using a Cayan Genius terminal to process a credit card.

In POS click on Invoice Lookup and pull up a sale that the repetitive invoice has to be setup for. The sale has to be paid for by credit card.

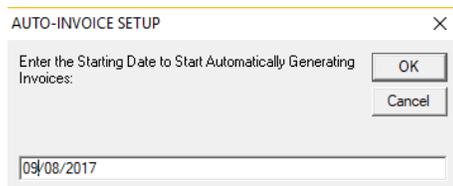
Alternatively, create a new invoice in POS by ringing up the needed SKU's. Click the Receipt button to open the payment screen. Click on Credit Card and process the payment through the Genius terminal. At this point a receipt will print out and a token will be created with the credit card information encrypted and stored on the Cayan server. Once the sale is completed and paid for, click on the Invoice Lookup button and double click on the just paid invoice to view it in the POS.

Once the completed invoice is pulled up in POS, on the top menu, an option for "Repetitive Invoice" will appear.

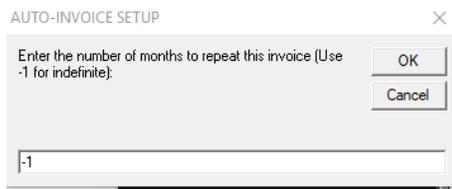


Once that option is clicked a message will display informing you that a repetitive invoice is being setup. Click "YES" to proceed.

The next message will prompt to enter the date to start automatically generating the selected invoice.



On the selected date, an exact copy of the currently selected invoice will get created. Click OK to proceed.



In the following message box enter in the number of months to repeat the invoice. Enter in -1 to keep repeating the invoice indefinitely.

The final pop up message will confirm that the repetitive invoicing has been set up. Click OK. The Invoice will remain displayed in the POS.

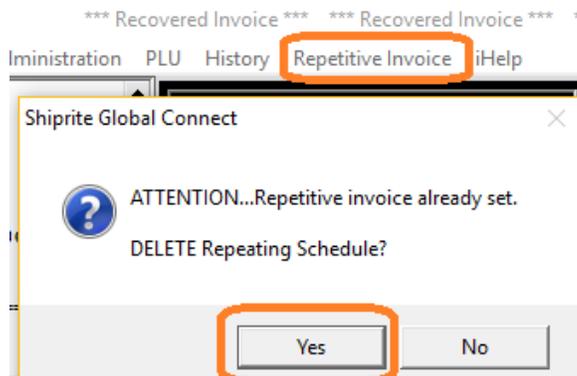
For the upcoming repetitive invoices, ShipRite will use that token to automatically process a payment for the created invoice.

In case that any other form of payment is taken, or no payment is taken at all, no automatic payments will be applied to the repetitive invoices. They will simply be charged to the account each month and added to the running balance.

Stopping repetitive invoices

If you wish to get a list of all your repetitive invoices, then please go into the POS without selecting a customer account > Hit “Actions” at the top > Select “Repetitive Invoices” at the top. This should then display all original repeating invoices for your customers.

In order to cancel and stop specific repetitive invoices from being created, pull up the customer tied to the invoice in the POS. Then please click “Actions” at the top > “Repetitive Invoices” and find the invoice number you wish to stop. Please note that invoice number then exit that screen and go to “Invoice Lookup” on the bottom. Pull up that noted invoice number, then on the top menu click on “Repetitive Invoice”. A message will appear to confirm the deletion of the repetitive invoice schedule. Click YES. The scheduled repetitive invoice will then be cancelled.



4. AR Alpha List Report

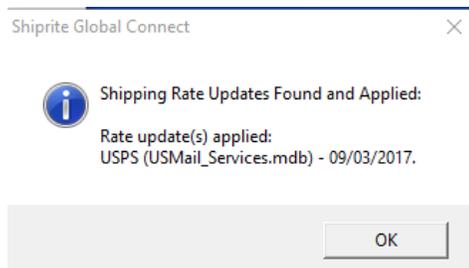
A new Accounts Receivable alpha listing report is now included. The report will list all accounts that are currently setup in your software. The difference between this report and the AR Aging summary is that it will include all accounts, including ones that do not have a balance.

To print that report from the main menu go to Actions > Accounts Receivable > File > Print > AR Alpha Listing.

5. 9/3/2017 USPS Rate Update

This update also includes the new USPS First Class Parcel pricing that will take effect on 9/3/2017. Installing the update will download the new rates, however they will not be applied until 9/3/2017.

On September 3rd, when opening ShipRite, a message will appear that the rates have been loaded.



COST-Pack
3.00
3.00
3.00
3.00
3.00
3.16
3.32
3.48
3.64
3.80
3.96
4.19
4.36
4.53
4.02
4.16
4.30

The only rates that changed are domestic First Class Mail parcel retail rates. All other USPS pricing remains unaffected.

To verify that the new rates took effect, on September 3rd 2017 go to Actions > Table Management > Master Shipping Table > USPS > FirstClass > Costs & Retail. Scroll to the right and check the "COST-Pack" column.

The pricing should match this table:

Also, remember to check the "RETAIL-Pack" column and adjust your retail pricing.

Fixes Included in version 17.2

Type	Module	Description
Fix	AR	AR Aging report should show data based on the AsOfDate selected.
Fix	AR	AR account balance and aging summary needs to apply available credits to the aging debits so aging values are accurate.
Fix	Inhouse	PostNet: Download coupons.up_ via HTTP instead of FTP.
Fix	POS	Standard POS: Allow user to delete hold/quote invoice lines.
Fix	POS	Deleting line from hold/quote invoice with discount will cause total to not evaluate correctly.
Fix	Coupons	Coupon Start and End Date should be inclusive in the effective date range.
Fix	Reports	Run z-report code if 'CONSOLIDATED' is passed to loadmenu().
Fix	USPS	Regular Priority Mail cost will show Cubic Rate cost if applicable.
Fix	USPS	Czech Republic is included in USPS Express/Priority Mail Intl Exceptional Size Limits.
Fix	QBO	Need to get most current default browser and check if the exe exists when getting default browser.
Fix	QBO	Coupons allocation rounding can cause QBO journal entry to be off balance by a small amount.
Fix	QBO	Coupons allocation needs to compare department names case insensitive.
Fix	Reports	MBX key deposits should be included in production report by dept.
New	USPS	SR Cubic Rate Feature option added to USPS Carrier Setup.
Fix	Inhouse	When moving contact history to new account, AcctName should be updated.
Fix	USPS	Insurance Names list was empty in MST - USPS Insurance.
Fix	POS	ShipTo address on the receipt will only show the first address line.
Fix	Inhouse	Change instances of 'note', 'Note' to 'NOTE'.
Fix	Inhouse	Delete PostNet CC tables if found in non-postnet shiprite db.
Fix	ShipMaster	Ship Address in Shipping Master will only show first address line when using auto-complete.
Fix	AR	AR Ledger listing no longer showing old Ledger Notes.
Fix	Inhouse	PostNet: One time update added to make sure IsServer local field is set based on the shiprite.ini setup to correct PNLink Down POS message.
Fix	POS	If older invoice, payment uses original date as default. Should use current date for payment.
New	POS	Repetitive Invoicing added to POS and startup.
Fix	POS	PostNet: Remove PNLink Down message from workstation computers.
Fix	MailBox	Don't advance MBX renewal date by 1 day.
Fix	USM	USM specific .upd import doesn't process names with MBXNamesList table used in MBX package processing.
Fix	USM	USM specific .upd import will erroneously add mailbox with no info for contact not found in database.
Fix	DHL	Can't delete DHL package from Shipment History.
New	Net.EndiciaWeb	DYMO stamp request was added.

New	Net.Gateway2ShipRiteNet	DYMO stamp request was added.
New	VB62Net	DYMO stamp request was added.
New	MailMaster	If DYMO Account is enabled then Endicia Web Service will print stamps.
New	ProgramSetup	DYMO account won't have 'Change Pickup Location' option.
New	ProgramSetup	DYMO Stamps Activation Code option to enter the code was added.
Fix	DHLWeb	Commodity element should have a valid commodity code, or the Commodity element needs to be removed all together.
Fix	SpeeDee	If 3rd party insurance is turned on, then \$0.00 should be reported. If 3rd party insurance is turned off, then the insured value should be displayed.
Fix	UPS	Pricing Matrix: Don't set price to 0 if UPS Letter weight over 0.5 lbs.
New	MergeMaster	Update MergeMaster look and functionality.
Fix	MergeMaster	When merging contacts/accounts, update name values in tables where applicable.
Fix	ShipMain	Disable Dock Hand Manager & Purchase Orders menu items from main shiprite form.
Fix	Net.MailBox	Check In 'Print Notice' and 'Print Label' labels sometimes are overlapping each other if printed at the same time.
Fix	Net.MailBox	Clear image buffer before/after printing Check In 'Print Notice' and 'Print Label' labels.
Fix	UPS	UPS Next Day EAM doesn't show for saturday delivery when applicable.
New	Net.DropOff	Drop Off Manager UPS drop off web URL updated.
Fix	Net.MailBox	Reload previously saved form settings after updating to new version.
Fix	Net.DropOff	Reload previously saved form settings after updating to new version.
Fix	Reports	Customer Count on Production Rpt should count # of invoices for given period.
Fix	EndiciaWeb	Sending a letter via Endicia gets weight rounded up when submitted to ELS.
Fix	Inhouse	Include relevant info in repetitive invoice records added to db.
Fix	POS	When making repetitive invoice ask for starting date, not a day of the month.
New	Inventory.upd	PostNet: US Inventory updates.
New	Inventory.upd	PostNet: CA Inventory updates.
Fix	POS	POS Includes Notes not added to POS On-Screen receipt.
Fix	POS	Recalculate receipt total to make sure it's accurate in Standard POS.
Fix	AR	Adding New Contact to Account from AR screen results in editing first contact in list.
Fix	Contact	When clicking Clone Contact, don't create account for contact automatically.
Fix	Contact	When pressing Enter in Name textbox where Name <> "" and (FName = "" OR LName = ""), a name with a single quote will cause SQL error.
Fix	MailMaster	Shortcut buttons won't print Endicia Web Service DYMO stamp.
Fix	ProgramSetup	DYMO Stamps option to copy Endicia account from Label Server was added.
Fix	ProgramSetup	DYMO Stamps Activation Code option to enter the code was removed.
Fix	ProgramSetup	Added setup option to enable/disable repetitive invoicing.
Fix	EndiciaWeb	Send DYMO stamp image straight to the printer.
New	POS	Canada receipts will have HST, PST, GST sales tax break-down.
New	Net.ShipRiteReports	Canada receipts will have HST, PST, GST sales tax break-down.
Fix	Inhouse	Process repetitive invoice function at start up updated to process and save repeat CC transactions.
Fix	Inhouse	Genius repeat sale function updated to correctly process and save repeat CC transactions.
Fix	Inhouse	Updating setup policy doesn't update fields in Setup2 table of shiprite DB.
New	Reports	Add SR / PNLINK version to Production report.

Fix	Master	FedEx Intl DAS surcharge missing in MST so user can't edit manually added DAS charge when applied.
Fix	POS	Ability to specify tax jurisdiction at the SKU level rather than just the department level.
Fix	FedEx	Intl Only: Label should show sender as shipper's address. Not store address. Should match Commercial Invoice.
Fix	UPS	Intl Only: Label should show sender as shipper's address. Not store address. Should match Commercial Invoice.
Fix	DHL	Intl Only: Label should show sender as shipper's address. Not store address. Should match Commercial Invoice.
Fix	UPS	PostNet: Separate out "Early Surcharge" from shipping cost before applying discount.
Fix	ContactSearch	When saving/updating contacts in the contact manager, update the last updated date in the database.
New	AR	Add ability to email AR statements in AR Statement Processing form.
New	MailBox	Add ability to email Mailbox notices in Tickler, Mailbox Manager forms.
New	Inhouse	Added ability to update mailbox rental agreement field in database if MBContractStatement.upd file is in datapath.
Fix	Net.ShipRiteReports	Mailbox Rental Agreement and contract updated.
New	AR	AR 'Print Alpha List' menu option added to AR form to print AR Alpha listing.
Fix	MailBox	Can Origin: When renting mailbox, don't show 1583 form input frame since 1583 form is inapplicable.
Fix	Net.ShipRiteReports	Can Origin: Don't show termination addendum signature line on Mailbox Rental Agreement.
Fix	Shipping	Can Origin: Only disable "Go Online" button for Purolator, Canada Post.
Fix	EOD	Reenable Program Updates button in EOD screen.
Fix	Inhouse	Remove SQL Update that sets Contacts Country field from 'USA' to 'United States' on every startup.
Fix	Inhouse	PostNet: Disable USPS Cubic rating.