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Procedures for implementing Genius terminals

Requirements

- 1. Cabled internet access. Does not operate wireless
- 2. Counter space.

Setup

- 1. Plug in internet to the combination interface cable; not directly into the terminal.
- 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

Configuring 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.

Setting up Smart Swiper

 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: <u>http://support.shipritesoftware.com/PostNetFiles/SmartSwiperGenius Setup.exe</u>
 Follow the prompts to load the program. Click FINISHED when done. 2. Start Smart Swiper from the Smart Swiper ICON on the desktop. The security window will pop up immediately:



3. The Smart Swiper terminal is visible now:

Sn	nartSwiper Ex	press by Ship	rite Software	e, Inc	×
New Sale				ADMIN	
Enter Invoic	e Number				
QZ 1	ABC 2	DEF 3		CLEAR	
GHI 4	JKL 5	MNO 6	BATCH	ADMIN	
PRS 7	TUV 8	WXY 9	VOID	ENTER	
	0		REFUND		
MI S	(c) Copyright Shiprite Soft	2015 ware, Inc.	3.0	EXIT	
Rev 1/1/20 opyright 2012 Shiprite Softwar	15 , 160 ALL RIGHTS RES	ERVED			

To get to setup, click on the ADMIN button. This is the ADMIN window.

SMART SWIPER GEN	ERAL SETUP
dministration History General Setup	Support Functions 1 Support Function 2
Merchantware Setup SWIPED CREDENTIALS KEYED CREDENTIALS World Pay Setup WP_SWIPED CREDENTIALS Jump to World Pay Portal (Customer Care Department at 800-859-5965) Blackboard Setup BLACKBOARD CREDENTIALS	Ingest Credentials
OPTIONAL SWITCHES LOCAL CONFIGURATION SETTINGS PRINTING AND REPORT SETUP TEST PIN PAD ENABLE TEST MODE	Receipt Logo Fixel Size is 262 × 80 CLEAR BROWSE Note: If graphic does not fit in this box, it will be too large for a standard receipt. If you customize your receipt, you can still browse for a larger logo, it just will not fit in this box.

4. If you have your ORIGINAL CREDENTIALS Message, you can COPY the credentials and PASTE into the INGEST CREDENTIALS window as seen below:

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



Now Click on SWIPED to ingest the credentials. You will get a pop up. Click YES. Repeat for Keyed if you have a valid number entered. Enter the credentials exactly the same way you did it before.

If the credentials do not get ingested for whatever reason, you can enter them manually. Click on SWIPED CREDENTIALS:

	Mer	chant Ware Configuration Page		×
ELEMENT		VALUE	II.	NFO
MW_I	DBA/Name	POSTNET RA 324		
	MW_SiteID	RNQPUC86		
	MW_Key	45T8X-BOE18-ESEQK-6OHLN-J6290J		
MW_G	ieniusGate			

Then repeat for KEYED CREDENTIALS.

Once finished, click SAVE then EXIT.

Exit back out to Administrative panel. Put a check mark in GENIUS ENABLED.

	SMA	RT SWIPER GENE
Administration	History	General Setup
Merchantwar SWIPE	e Setup ED CREDENTIALS	Genius Is Enabled

5. In local configuration, set the IP address of the Cyan terminal (you figured out the IP address on Page 1).

			×
	LOCAL CONFIGURATION SET	TINGS	
ELEMENT	VALUE		NFO
F 11 F 7	DrawenD	•••	
Enable I ransactio	DILOgging False		
IncludeCust	omerCopy False		
Disal	bleSounds False		
SecuredK	eyedEntry		
EnableRem	oteControl False		
PinPad_C	DMM_Port		
Auto	CloseTime		
D	epartment		
	Location		
Departme	ntChoices		
C	ENIUS_IP 192.168.0.38		
GENIUS_Stat	ion_Name		
	<u> </u>		

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

- 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.
- 7. 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.

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.

SmartSwiper Networking multiple POS stations

If you have multiple POS computers, use the link below to Install SmartSwiper on each workstation computer that is running ShipRite.

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http://support.shipritesoftware.com/PostNetFiles/SmartSwiperGenius Setup.exe

SERVER COMPUTER:

The SmartSwiper folder on the server computers needs to be shared.

- 1. Click on the File Explorer icon on the bottom windows task bar. (or click on the "This PC" icon).
- 2. Select This PC
- 3. Select OS (C:)
- 4. Find the *SmartSwiper* folder and rightclick on it.
- 5. Select Properties
- 6. Click on the *Sharing* tab
- 7. Click on Advanced Sharing
- 8. Check the Share This Folder option
- 9. Click the Permissions button
- Shared This PC Create shortcut 🔄 shiprite 3D Objects shipriteCanada Delete Desktop ShipriteNext Rename Documents shipritePR Properties SmartSwiper 🖶 Downloads SmartTouchPOS 8/20/2019 4:19 AM File folder Music SymCache 5/5/2017 2:46 PM File folder Pictures Users 1/17/2019 3:49 AM File folder 📕 Videos Windows 8/18/2019 5:13 AM File folder 🛀 OS (C:) 3/1/2017 10:49 PM dell.sdr SDR File Network SmartSwiper Properties × General Sharing Security Previous Versions Customize Network File and Folder Sharing Advanced Sharing SmartSwipe Not Shared ☑ Share this folder Network Path: Settings Not Shared Share name: Share... SmartSwiper Add Re Advanced Sharing Set custom permissions, create multiple sha advanced sharing options. Limit the number of simultaneous users to: 20 🗘 Comments: Advanced Sharing... Password Protection People must have a user account and pass Caching Permissions computer to access shared folders To change this setting, use the Network ar OK Cancel Apply OK Cancel Apply Permissions for SmartSwiper Share Permissions 🎎 Everyone Add... Remove Deny Permissions for Everyone Allow Full Control \checkmark Change \checkmark \checkmark Read

ProgramData

Recovery

Cut

Copy

- Select *Everyone* (if you don't see "Everyone" listed, click
 Add and add in a user called "Everyone")
- 11. In the "Allow" column check Full Control
- 12. Click **OK**

CLIENT / WORKSTATION COMPUTERS:

Follow these steps on each client/workstation PC.

Map Network Drive

- 1. Click on the "File Explorer" icon on the bottom windows taskbar.
- 2. Right-click on the This PC icon
- 3. Select Map Network Drive
- Select Drive "S". (if it's already used, select a different drive letter)
- 5. Click the *Browse* button.

shiprite		✓ Devices and drives (1) OS (C:) 70.1 GP free of 228 GP
🗸 📃 This PC		70.1 GB HEE 01 223 GB
🔉 🧊 3D Objec		Collapse
> 📃 Desktop		Manage
> 🔮 Docume		Pin to Start
> 🕹 Downloa		Map network drive
> 👌 Music		Open in new window
> 📰 Pictures		Pin to Quick access
> 📑 Videos		Disconnect network drive
> 🏪 OS (C:)		Add a network location
Notwork		Delete
/ PINELWOIK		Rename
8 items		Properties

- 6. Browse to your Server Computer and select the SmartSwiper folder.
- 7. Click OK.
- 8. Click Finish

– 🔍 N	/lap Network	Drive
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What network folder would you like to map?

Specify the drive letter for the connection and the folder that you want to connect to:



2. Adjust Smartswiper.INI file

On the bottom Windows Search Bar type in *smartswiper.ini*, press enter or click the "OK" button.

(If you don't have a windows search field, right click on the Windows Start icon and select "Search")

A Notepad will open up with following information

[SmartSwiper]

DataPath=c:\SmartSwiper\DATA ReportPath=c:\SmartSwiper\REPORTS ApplicationPath=c:\SmartSwiper TransactionLogPath=c:\SmartSwiper\TRANSACTIONLOGS



Notice how it says **DataPath=C:\SmartSwiper\Data** - change the **"C:\SmartSwiper\Data"** part to **"Z:\Data".** (OR whichever letter name you have selected) The other lines do not need to be changed.

The file should look like this:

DataPath=Z:\Data ReportPath=c:\SmartSwiper\REPORTS ApplicationPath=c:\SmartSwiper TransactionLogPath=c:\SmartSwiper\TRANSACTIONLOGS

Click "X" in top right corner to close the window and when prompted to save click "YES".

Repeat this procedure on all of the stations that you have.

Setup Genius IP on each station

With SmartSwiper networked, your credentials will automatically be loaded on each workstation. You still need to set up the Genius IP address on each computer individually.

On each station open up SmartSwiper > click on Admin > General Setup > Local Configuration Settings > GENIUS IP. Enter in the IP address of the Genius terminal that you want that workstation to connect to.

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

Total: \$0.02		
Please Mak	e A Selection	
Cancel Transaction	Charge as Credit	
		/

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

Total: \$0	.02		
×			
	Please S	ign	
Clear		Accept	
	Contrasting Contrasting		

- 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

You must first ensure that you followed the instructions in SETUP where you entered your KEYED CREDENTIALS.

Total Sale:	Payment Master	Always show Change Due for Cash
\$ 0.02	7 8 9	
	4 5 6	2 2 2 50 50 5 8 6 5 100 8 100 5 100 8 100
Cash:	1 2 3	10 a 10 Exact Cash 10 Exact Cash
Check: Card:	0 00 .	
ther 🔽	Del Enter	Credit Card
Payments: \$ 0.00		
Change: \$0.00	Complete Sale	Email Receipt:
	Apply Credit to Account	Posting Date: 09/29/2015

• 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

<text>

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

File Edit Shi	Sales Actions Print Administration New Sale Finish Sale with Receint	PLU iHel F2 F6	p	Ś	0.02	Main			
Inv#:18	Finish Sale with No Receipt Quick Refund Void Sale No Sale	F7 Ctrl+D Ctrl+N	1: \$0.02 TxR: 9.2 Disc: 0.	Tex: 5 50 TxC: 0 Inv#:	0.00 ONEIDA 18272	Print	Wide Format	Blue- prints	Finish
Descripti SKU#	View Paymnt History on Invoice	Ctrl+H				Fax	Notary		
Print- B&W- 8.5 X 11 Single Premium 220811P 0.01 1 \$ 0.01t Print- B&W- 8.5 X 11 Single Premium 220811P 0.01 1 \$ 0.01t		7	8	9	del	Online Print Center			
\pproval# 061424 DrderID# 299767323	4	5	6		мвх	Pack Master	Pack Supply	Post Stamp	
		1	2	З	enter	Ship	One	Ship	Multi
		0		0		Ship	Letter	Print	Post
	Cancel hold invoice	o _b c _d	Cust cust ookup	ange ice disc	% ~1X em change count tax	? quantity	receip		eipt

- 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

s 💽		REFU	IND SALE APPRO	VAL	
	Invoice #:	18272	Original Clerk:	ADMIN	
Inv#:	Date of Sale:	09/29/2015	Refunding Clerk:		Finish
lescrip	Today's Date:	09-29-2015			_
Print-	Total:	\$ 0.02	Approved By:		
Approva OrderID	Reason for Trainin Custon Clerk E Testing Other	or this action g ner Changed M Error	: Vind		Post Stamp Autti Post

• 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

	Refund Procedure		
		Save 🔶	Cancel 😑
Refunds	Explanation for Return:	(Required)	
Address(Required):	Customer request		
ShipRite Parcel Copy & More 1315 Genesee St Utica, NY 13502			•
	SmartSwiper		
Phone Number(Required):	REFUND -\$ 0.02 ON Invoice #:18272	\$ 0.02	
315-733-0036	ACCEPTED	\$ 0.00	
Invoice Number: 18272	ОК		
Manager ID	Charge Card Refund:	\$ 0.02	
ADMIN	Credited On	\$ 0.00	
Drawer ID NA	Account:		

• 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.

	mart shiprite Soft	Swiper	REFUND	EXIT	
Rev 1/1/20	15				
ight 2012 Shiprite Softwar	e, Inc ALL RIGHTS RES	ERVED			
-					

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

m)	Shiprite Software, Inc
0	Smart Touch POS Powered By Transport WEB
SALE	
	Invoice Number:
	Trans Amount: \$0.00
	Label3
CLEAR	
	Administrative Lasks www.merchantwarehouse.com

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.

IP address:	192 168 0 38			
Serial number:	285-544-192			
App template:	GENIUSITX			
App version:	4.3.3.4			
)S Version:	release-20120	release-20120625-SC-3.1.2-B		
ast heartBeat:	30 Sep 2015 09:45:15 GMI			
erminal status;	OK			
Update	Restart	Test		
0 Sep 2015	Press X to exit	10:04:13		

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