SMARTPOS

Upgrading SmartPOS from Generation 2 to Generation 3

Version 1.0

3/24/2021

Installation Guide

PETROSOFT

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UPGRADING SMARTPOS FROM GENERATION 2 TO GENERATION 3

The procedure for upgrading SmartPOS from Generation 2 to Generation 3 includes the following steps:

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- **Step 3**: Set up the device.
- **Step 4**: Install the software.
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> ⊙ YOUR REGISTER WILL BE DOWN DURING THIS UPGRADE. PLEASE PLAN ACCORDINGLY TO CLOSE THE STORE AND/OR COMPLETE AFTER HOURS.

Step 1: Checking Preconditions

Before you begin the upgrading procedure, do the following mandatory steps:

1. Make sure that all shift and day reports on the terminal are closed. If not, close them.

> ⊙ Please be aware that if the shift or day report is not closed and sent to CStoreOffice®, all its data will be lost!

> ⓘ For more information on how to close the shift and day reports on the terminal, see the **Change Shift and Day** section in the SmartPOS User Guide.

2. Make sure all batches on the PIN pad are closed. If not, close them.
3. Prepare the Petrosoft USB flash drive and USB keyboard.
4. Write down the license key of the SmartPOS terminal. You can find the license key in the following ways:

o **In the SmartPOS terminal**: Go to **Settings** > **General** tab.

> ⓘ For more information on how to access SmartPOS settings on the terminal, see the **Settings** section in the SmartPOS User Guide.

o **In CStoreOffice®**: Log into **CStoreOffice®** > switch to the **SmartPOS** product and go to **License Management**.
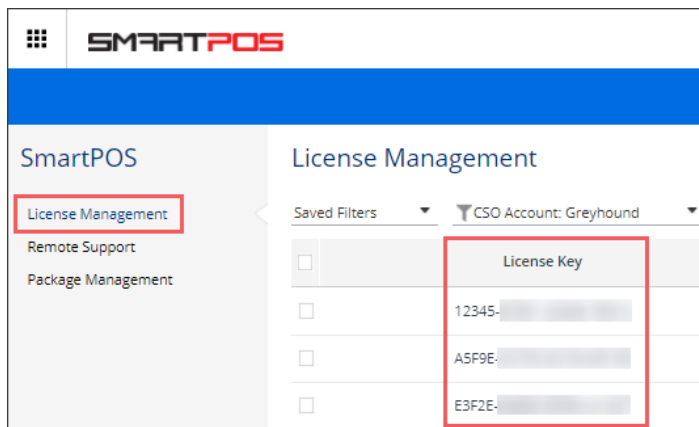
> ⓘ For more information on how to access the License Management form in CStoreOffice®, see SmartPOS License Management.

5. Take pictures of the SmartPOS settings on the terminal. You will need these pictures to configure the following terminal settings once again at the end of the upgrading procedure:
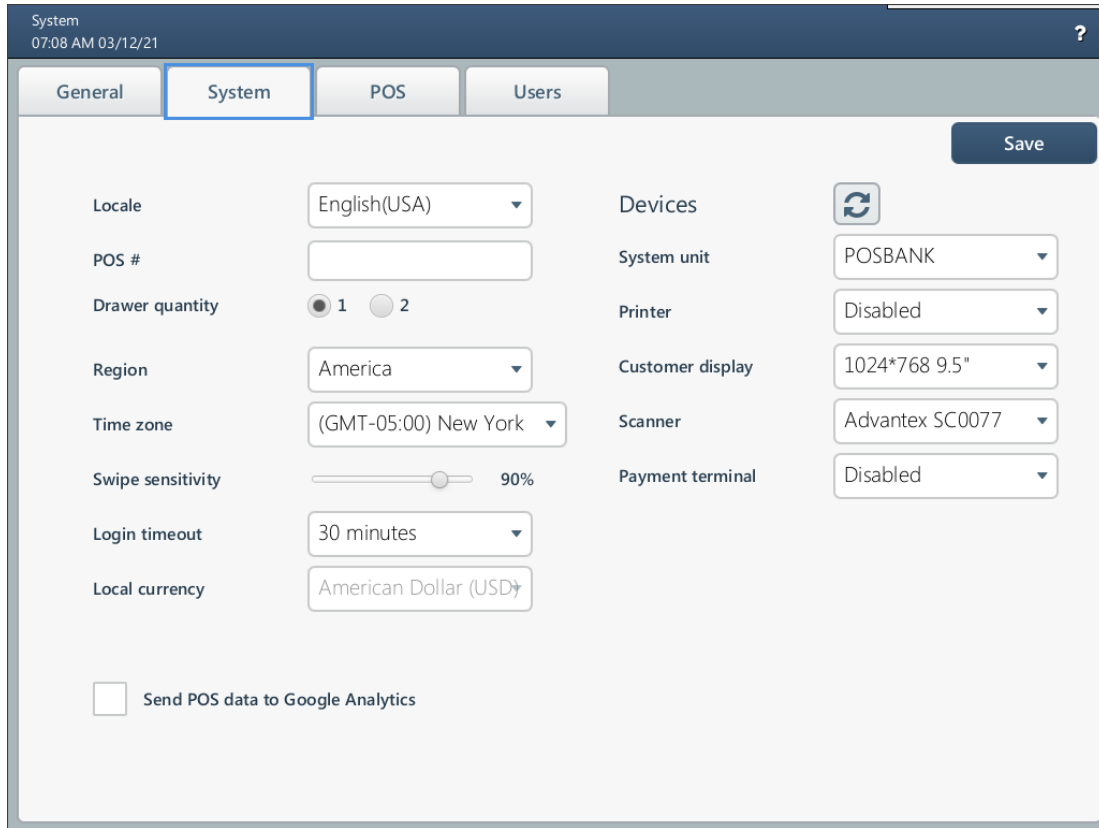
o **System Settings**

o **POS Settings**: In the **POS Settings** tab, tap and take a picture of each section in the left menu.
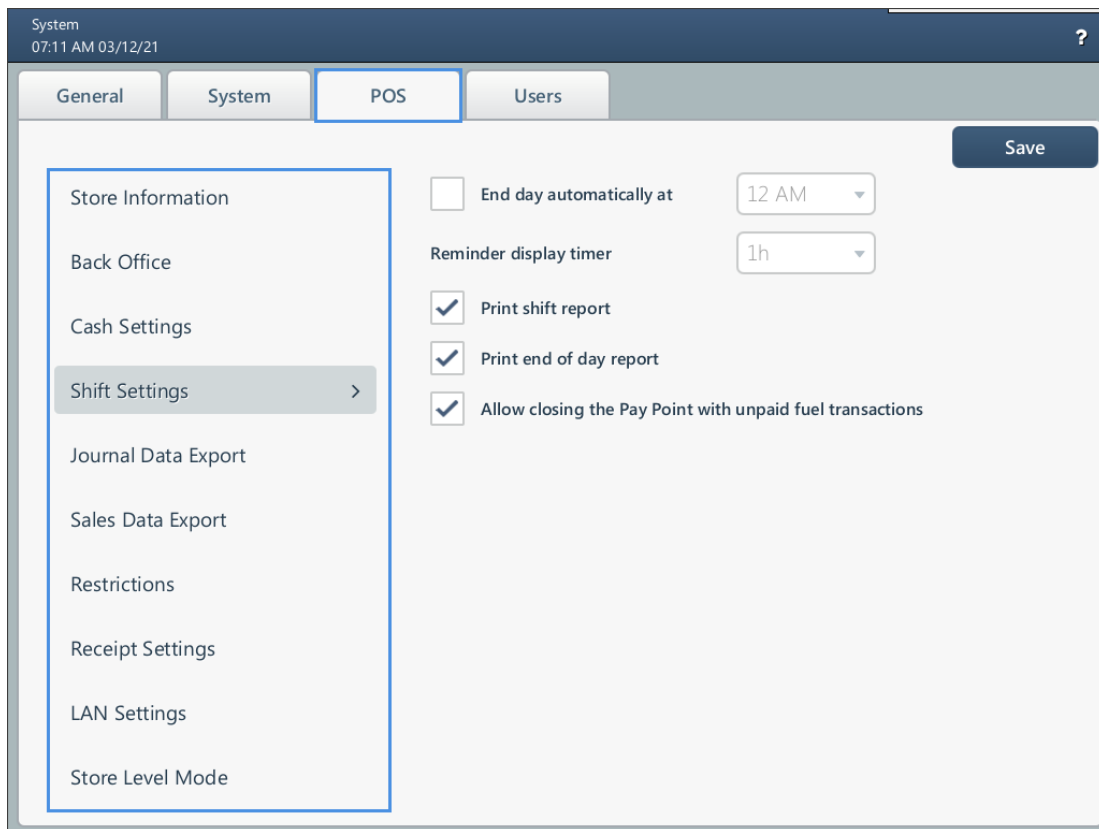
o **Fuel Settings**, if any.

	For more information on how to access SmartPOS settings on the terminal, see the **Settings** section in the SmartPOS User Guide.

	Before you proceed with the next step, double check that you have completed all the steps above!

Step 2: Changing the Generation Value for the License Key

To change the generation value for the license key from 2 to 3:

1. Log into CStoreOffice®.

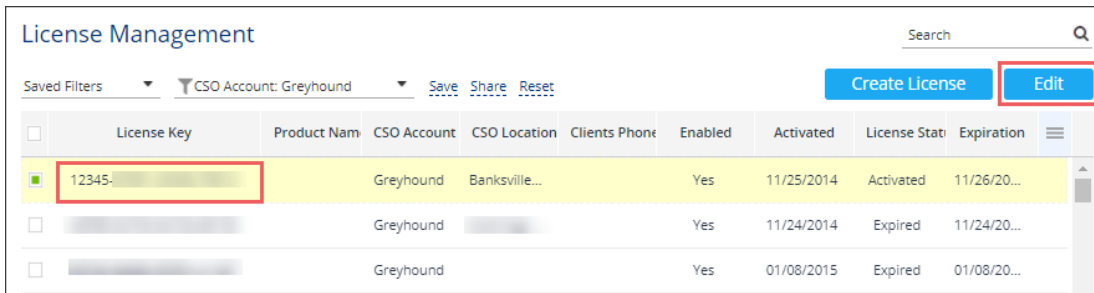2. Switch to the **SmartPOS** product.

3. Go to the **License Management** form.

4. In the **License Management** list, select your license and double-click it or click the **Edit** button.

Result: The License Key form opens.

5. In the **License Key** form go to the **General Settings** tab.

6. In the **Generation** list, select **3**.

7. At the top right of the form, click **Save**.
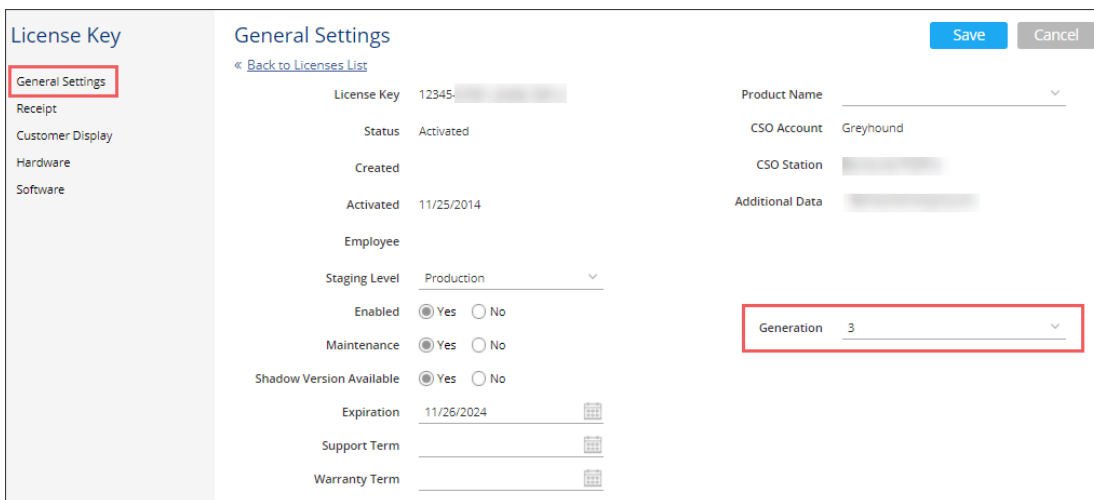
Step 3: Setting Up the Device

The procedure for setting up the device includes the following steps:

1. Power down the SmartPOS terminal.

2. Plug programmed USB flash drive into the USB port on the terminal.

3. Plug external USB keyboard into the unit.

4. Power on the SmartPOS terminal.

5. Depending on the SmartPOS model, enter either of the following BIOS Boot Specification (BBS) settings:

   o For Model 800: During start up, press **F11**.

   o For Model 400: During start up, press **F7**.
   Result: The BBS menu opens for a certain device model.

6. Once the BBS menu opens for a certain device model, select the proper device to boot from. See examples for different device models in the images below:

   o BBS Menu for Model 800
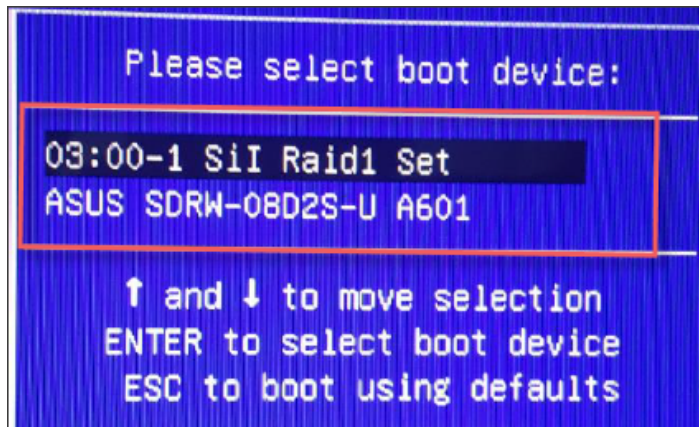
o BBS Menu for Model 400
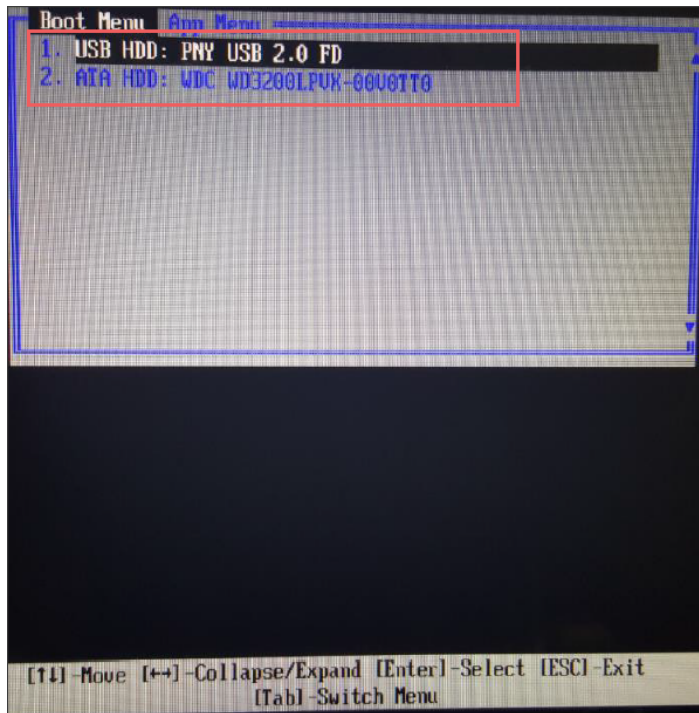
	If you use the USB flash drive, find the name of this flash drive or the **USB HHD** name as it is displayed in the image above for Model 400.

7. Proceed to the next step with the software installation procedure.

SMARTPOS

Step 4: Software Installation

> 💡 Before you start the software installation procedure, make sure you have an active internet connection.
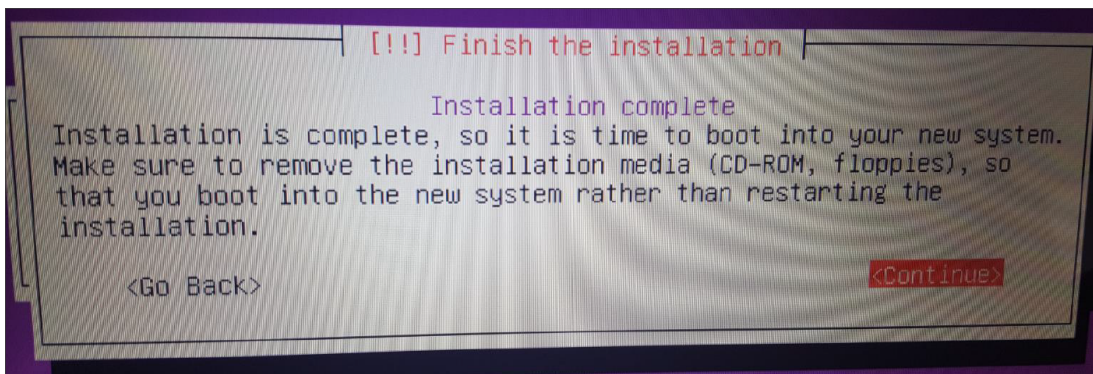
The software installation procedure includes the following steps:

1. Once booted from the proper device, the software installation process will start.

   > 💡 The installation process is done automatically and can take up to 1 hour.

2. Once the installation process is complete, the **Finish the Installation** window is displayed.

3. Remove the USB flash drive from the SmartPOS terminal.

4. Press **Enter** on your keyboard to finish the installation.

   Result: The system will power down.

5. Power the SmartPOS terminal on.

Step 5: Post-Installation Procedure

The post-installation procedure includes the following steps:

1. Once the SmartPOS terminal is rebooted, the License key screen is displayed on it.

2. Enter a valid license key for your location.
   Result: The SmartPOS terminal starts updating.

   > ⓘ To check your license key, log into **CStoreOffice®** > switch to the **SmartPOS** product and go to **License Management**. For more information on how to access the License Management form in CStoreOffice®, see SmartPOS License Management.

3. Once the terminal's update process is complete, pull users, price book and load the Sales log in.

4. Set back all terminal settings to their original state using the pictures you have taken at the first step.