Setting Up and Using the Cross Check STX Shelby Interface

The Cross Check STX is the latest MICR and image scanner from MagTek, Inc. This document introduces some of the features of the Cross Check STX unit, and provides an overview for installing and using the Shelby Cross Check STX Interface. The unit supports two methods of Contributions check scanning: 1) traditional check scanning, in which a user scans checks while creating the giving entry, or 2) batch import processing, which allows a user scans a batch of checks and giving envelopes using the easy-to-use Shelby Cross Check STX Batch Processing program.

Batch processing creates image files that you import into Shelby. This means that employees or volunteers without knowledge of the Shelby program can assist in scanning checks and saving the scanned images to a file, which Shelby-savvy data entry personnel process later.

Features

- **Batch Import Processing:**
  The Cross Check STX can scan checks in a remote location, saving a batch of checks as an image file, which can be electronically transferred to a Shelby workstation.

- **Double-Sided Image Scanning:**
  When the Cross Check STX scanner detects a check MICR number, the scanner will automatically scan both sides of the check. The endorsement side can be viewed in the Shelby interface simply by right clicking on the check image.

- **Connection Options:**
  The Cross Check STX unit can connect to a single computer via a USB 2.0 connection (also USB 1.1 compliant). Alternatively, the unit can connect to a network using an Ethernet 10/100 Base-T connection, eliminating the need to purchase multiple units for each computer workstation.

- **Inherited Cross Check Standard Features:**
  In addition to Batch Processing, the Cross Check STX also employs a manual check scanning mode which enables the unit to function similarly to the standard Cross Check and Cross Check Plus systems. As with these earlier modules, the Cross Check STX is used to process donations in the Contributions and Donor and Gifts modules, process checks in the Accounts Receivable module, reconcile your bank statement in the Bank Reconciliation module, and process apportionments in the Remittance module.
Included with the Cross Check STX Unit

- A MagTek “Excella API/Demo Package” compact disc.
- A MagTek “Documentation” compact disc.
- An Excella Installation Guide booklet.
- A USB cable. Optionally, you may request to substitute the USB cable with an Ethernet cable at the time of purchase.
- A power cord.
- A power supply.
- A HP inkjet cartridge.
- The Cross Check STX unit.

Before You Begin

- Before you begin using the Cross Check STX interface in Shelby, you must first load the Activation Key for the Cross Check STX unit into your Shelby database. Shelby sends the activation key to each customer via e-mail upon purchasing the product, or the key is included with the Shelby software CD for new customers. Loading instructions also accompany the activation key.

  If you need assistance obtaining your activation key or help loading the key, have your official Shelby Contact (the individual authorized to do business with Shelby Systems) call Shelby Support toll-free at 1.888.697.4352

- Follow the directions outlined in the Excella STX Installation Guide booklet to set up the STX drivers and hardware. Make sure to test the reader using the STX Demo program prior to use.
Setup Cross Check STX in Shelby

1. Open the Module – Before using the Cross Check STX unit, you must configure the Cross Check STX Shelby interface. The configuration utility can be accessed through Contributions, Donor and Gifts, Bank Reconciliation, Remittance, or Accounts Receivable; however, the directions provided below demonstrate setup through Contributions.

2. Go into Processing – Click on Contributions Processing

3. Select Preferences – Click the Preferences button located at the top of the screen.
4. **Check “Use Cross Check”** – Check the “Use Cross Check” checkbox in the Preference grid.

5. **Click “Configure Cross Check”** – Click the “Configure Cross Check” button in the bottom-left corner of the Entry Preferences screen.
6. **Select “Use Cross Check Pro”** – Check the “Use Cross Check Pro” checkbox in the bottom-left corner of the *Cross Check Configuration* window.

7. **Select “Print Endorsement”** – Check the “Print Endorsement” checkbox if you wish to print a horizontal endorsement message across the back of the checks. This option does not affect Batch Processing.

The endorsement message is modified in two locations. Change the endorsement message in the Bank Reconciliation module when you are using single check feed scanning and change the message in the *Cross Check STX Batch Processing* program when doing batch processing.

Below are steps to change the message in Bank Reconciliation. More on changing the endorsement message in the *Cross Check STX Batch Processing* program in the Batch Processing section later.

**To Change the Endorsement Message in Bank Reconciliation:**

a) Open the Bank Reconciliation Module.
b) Click Utility in the menu bar at the top of the Home Base screen.
c) Choose Bank Account Information.
d) Double-click one of the bank accounts in the Bank Accounts grid.
e) Type an endorsement message in the *Cross Check STX Endorsement Text* field located at the bottom of the screen.

**Don’t Forget – Choose an Endorsement Message:**

If you use endorsements, choose an endorsement message in the Contribution Processing area from the *Endorsement* pull-down field prior to scanning checks (you will not see this field if you are not using the feature).
8. **Choose the Connection Type** – Choose your connection type by toggling the Device Name field to *STX_USB* (for USB connections) or *STX_Ether* (for Ethernet connections).

![Cross Check Configuration](image)

9. **Test the Connection** – Click the *Test Connection* button. A few seconds later, you will get an “operating correctly” message or “device could not be opened” message. If your device is not responding, check your cable connections, make sure the unit is powered on (indicated by the green LED light at the bottom), make sure you picked the correct connection type (USB or Ethernet), and click the *Test Connection* button again.

![Contributions](image)

10. **Click OK** – Click the OK button when finished. You are now ready to use your Cross Check STX Unit.
Check Scanning Manually

The instructions below outline manual check scanning. Manual check scanning is performed completely in the Contributions (or Donor and Gifts or Remittance) modules, and there is no need to use the Cross Check STX Batch Processing program.

1. **Create a New Batch** - Go into the Contributions module. Click on Contributions Processing, and create a new batch.

2. **Insert a Check** - Place a check in the check feeder.

3. **Create a New Contribution Entry** - Shelby will immediately scan the check upon starting a new entry.

4. **Click “Scan Documents”** - If you need to scan documents in addition to the check, click the Scan Document(s) button located at the bottom of the contribution entry screen (or press Alt+S on your keyboard).
5. Examine the Preview - A scan preview will appear on the screen as seen below:

Reposition and resize the scan preview and contribution entry windows as desired.

Left-click the check image to utilize the cursor magnifier. Right-click the check image to see the back of the check. You can also use the keyboard shortcuts F11 (to see the front of the check) and F12 (to see the back of the check) to manipulate the preview.
6. Finish the Batch Entry - Fill out and finalize the rest of the contribution entry. After entering all entries, save the batch. When you double-click an individual's entry in Inquiries, the scanned check image will appear. The scanned check images also appear in the image edit (the report generated while saving a batch) and the Contribution List Image report.
**Batch Processing**

Batch processing consists of the following steps:

1. **Organize Checks** – The device scans items until a MICR number is detected. Therefore, organize your checks and supplemental documents (such as the giving envelopes) so that the supplemental items are scanned first and the check is scanned last.

2. **Start the Batch Processing program** – Locate and Launch the Cross Check STX Batch Processing program (ssv5CCBatch.exe). By default, the executable can be found in the \Program Files\Shelby Systems folder. **Tip:** Create a shortcut to this program on your desktop or program group, if desired.

3. **Choose Connection Type** – Choose STX_USB for USB connections or STX_ETHER for Ethernet connections from the *Device* field.

4. **Choose an Endorsement Message** – If you wish to include an endorsement, check the *Endorse?* checkbox and type an endorsement message in the text field provided just below the checkbox. Click the Scan & Examine button when finished.
5. **Examine the Preview and Enter the Check Amount** - After scanning the first check, a scan preview appears on the screen, as seen below. If the unit did not detect the magnetic MICR number, make sure the skipped check is facing the correct direction and is not upside-down. Click the Delete/Skip button to erase the bad scan.

Enter the amount of the check in the amount field in the top-left corner of the preview screen. Press the Enter key (either press the Enter key to the right of the home row keys or on the Enter key on the num-pad) to scan the next check.

Left-click to magnify the viewing area of a check and right-click on a check image to see the reverse side.
6. **Save the Scanned Export File** – When the check feeder is empty, you will receive the message to the right:

If you are finished scanning all of your checks, click the *NO* button.

A message window then notifies you how many images were scanned.

Name and save the export file to your hard drive when prompted.
7. **Import the Scan File into Contributions** – Open Contributions. Click *Contribution Processing*. Click *File* on the menu bar in the top-left of the Contribution Processing screen and choose *Select Batch for Import*.

Click OK on the following message:

```
Contributions

CrossCheck Pro batch import completed!
Either select an existing or create a new batch to process these entries.
When you start entering, by selecting to enter a new gift, you will be prompted to process the batch.

OK
```

Create a new contribution entry in Contribution Processing, and start a new contribution entry. Upon starting the new entry, you will receive a message asking if you wish to process the imported batch. Click *Yes*.

The scanned imported image appears on the screen, and the amount of the check already filled in the Amount field.

The last task is to decide how you wish to distribute the check between purposes. Distribute the gift, and then click *OK* or *Apply* to finish the entry and start a new entry for the next scanned check.
Continue the entry process until the batch is complete. After all checks have been entered, you will get the message below prompting you to clear the work file where the imported batch is temporarily stored.

![Finished dialog box]

Click YES to clear the work file. If you click NO, the batch file will be re-imported when you attempt to create another contribution entry, and you will be prompted to re-enter the first image from the batch again.

After you have cleared the batch file, you may return to the Contributions Home Base screen and import another batch file. It would be a good idea to create a new batch in Contribution Processing for each import in case you make a major mistake entering a batch.

When you are through creating entries for the imported files, follow the normal process of saving batches in Contribution Processing.
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We want to hear from you!

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