

Genius[®]

CUSTOMER ENGAGEMENT PLATFORM[®]

SETUP GUIDE

This Setup Guide leads you through the basic steps required to install and configure Genius to work with your POS solution.

1 GETTING STARTED

Before you install your Genius device, please complete the following tasks:



Locate your MerchantWARE credentials. These were sent in an email from Cayan, which contains the words “**MerchantWARE Credentials**” in the subject line.

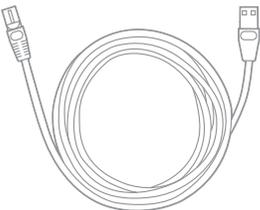


Check that your Internet connection is functioning correctly, and that there is an available network port on your router/switch.

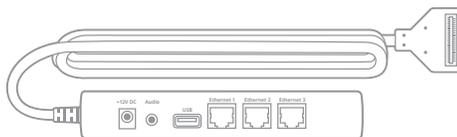
A video tutorial is available at cayan.com/setup



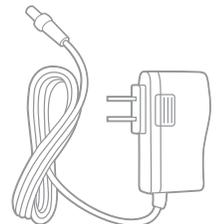
Genius device



Ethernet cable



Utility cable



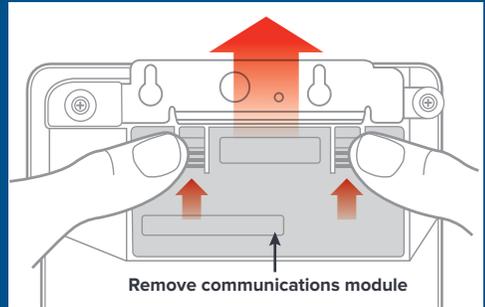
AC adapter

2

CONNECTING THE COMMUNICATIONS MODULE

STEP 1

Turn the Genius device upside-down and place it on a flat, stable surface. Firmly press the flexible tabs and push up to remove the communications module.



STEP 2

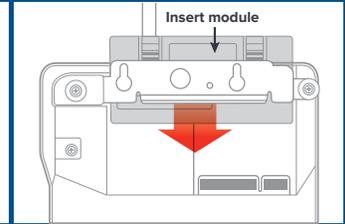
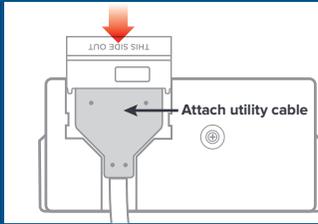
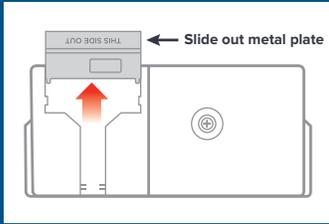
Hold the module securely in your hands and slide the metal plate out.

STEP 3

Attach the utility cable connector as shown and slide the metal plate back into place.

STEP 4

Insert the communications module into the Genius device.



3

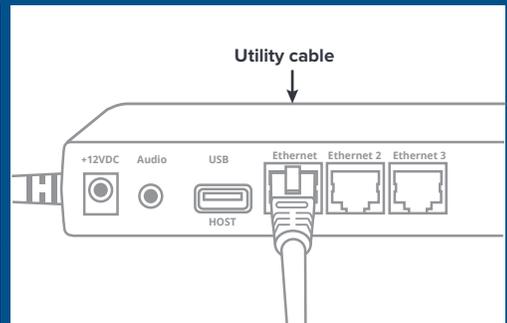
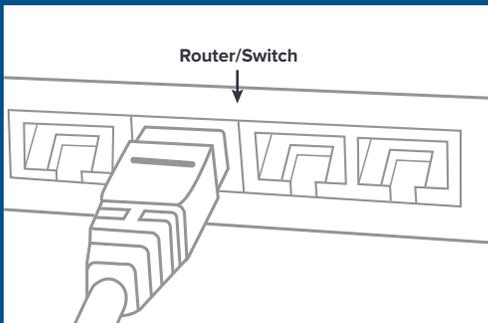
CONNECTING TO THE NETWORK

STEP 1

Connect one end of your Ethernet cable to an available port on your router/switch.

STEP 2

Connect the other end of the Ethernet cable to the Ethernet port on the utility cable.



4 POWERING THE GENIUS DEVICE

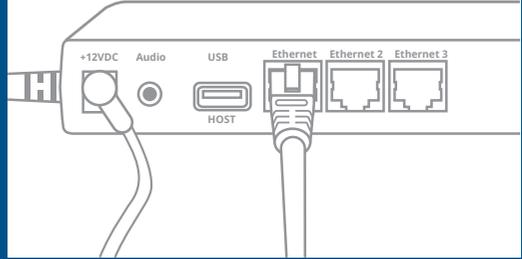
STEP 1

Check that the communications module is firmly in place on the Genius device.

STEP 2

Connect the AC adapter to the +12V connection on the utility cable and plug the adapter into a power socket.

Genius should now power on.



5 VERIFYING THAT THE GENIUS DEVICE IS READY

! IMPORTANT INFORMATION

The Genius device is configured to receive a **dynamic IP** address by default. If you need to configure a static IP address, please consult the reverse side of this guide.

1. On the keypad, press **0** three times to access the **Admin** screen.
2. Use the keypad to type the password **9416557** and press **Enter**.
3. Confirm that the **IP address** field is populated. Take a note of the address for use with your POS system.
4. Touch **Test** and confirm that all **Gateway connections tests** have been passed.
5. On the keypad, press the **X** button to exit and return to the main screen.



```
IP address: 00.00.00.00
Serial number: 169-043-097
App template: GENIUS
App version: 4.2.0.1
OS version: release-20120625-5C-3.0.9
Last heartbeat: 18 Jul 2014 04:29:40 GMT
Terminal status: OK
```

Update

Restart

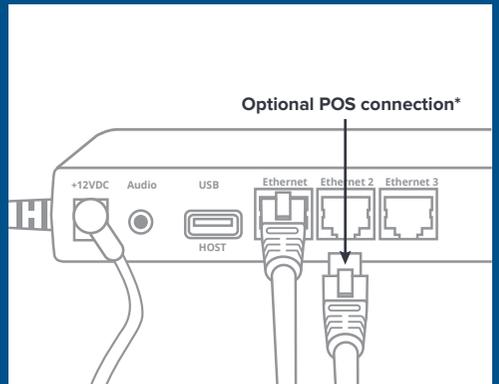
Test

Press the red X to exit

Note: If the **Gateway connection tests** fail, check your Internet connection or contact Cayan support.

6 CONFIGURING YOUR POS

1. Locate your **MerchantWARE** credentials.
2. Consult with your POS provider for assistance with configuring your system with the Genius device.
3. Configure your POS with the **IP Address** of the Genius device, your **MerchantWARE Name**, **SiteID** and **Key**.



***Note:** If you do not have access to a free port on your router/switch, you can plug the Ethernet cable directly into one of the Ethernet ports on the Genius utility cable from your POS (as shown).

7 TESTING A TRANSACTION

Cayan recommends that you run a test transaction on your POS system to check that it is correctly configured with the Genius device.

- ✓ If the test transaction transfers successfully to the Genius device, no further configuration is required. Cancel the transaction on your POS and start processing live sales.
- ✗ If the test transaction is unsuccessful, please call our support team at the number below.

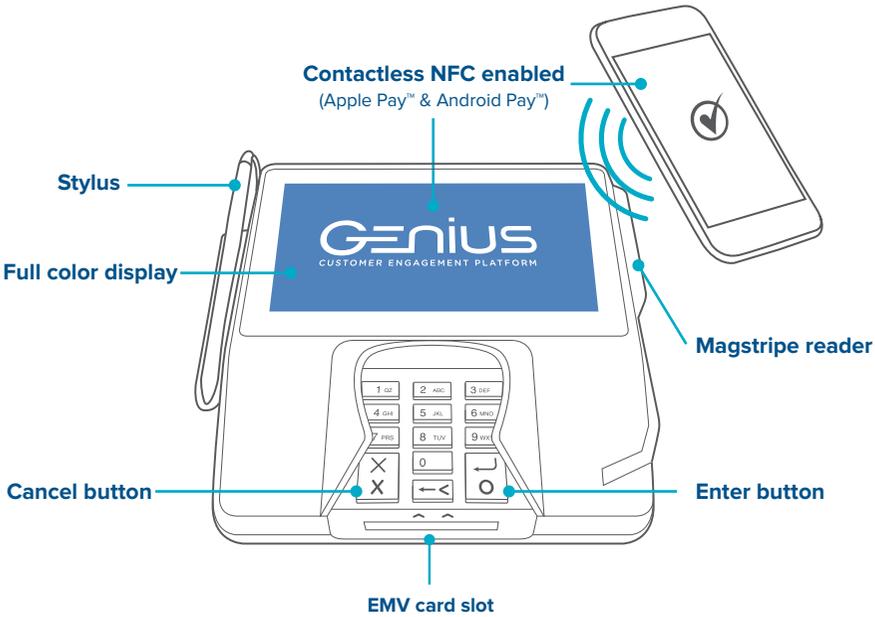
8 CONTACTING CAYAN SUPPORT

Before contacting the support department with a query, please gather the following information about your system:

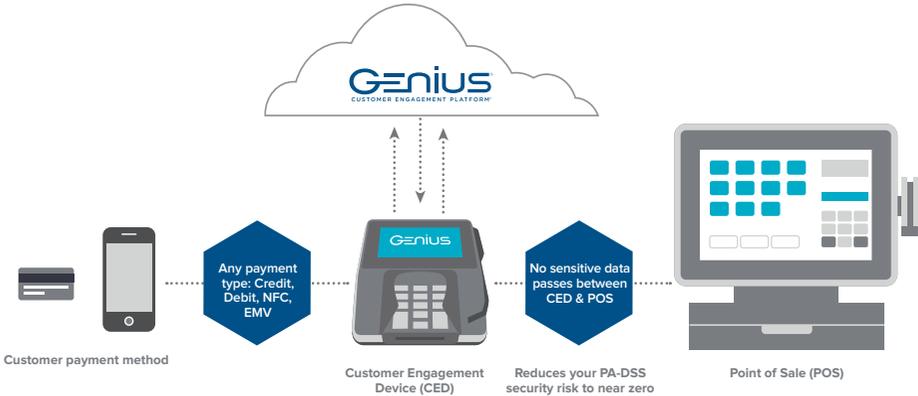
- Business name and information.
- MerchantWARE credentials.
- Your POS make and model.
- Specific details about the steps you completed before the error occurred.

We're here to help 24/7/365 - **888.249.3220**

THE GENIUS PLATFORM



HOW IT WORKS



TROUBLESHOOTING

If your Genius device is not functioning correctly, complete the steps outlined in this section.

A) Run the Genius device connection test.

1. On the Genius keypad, press **0** three times to access the **Admin** screen.
2. Use the keypad to type the password **9416557** and press the **Enter** button.
3. Touch **Test** and confirm that all **Gateway connection** tests have passed.
 - *If the tests all indicate "Passed," proceed to **Task E**.*
 - *If any of the tests indicate "Failed," take note of the failed tests and proceed to **Task B**.*

B) Confirm that all necessary ports and hosts are open and available.

1. Consult with your system administrator to confirm that the following ports are open:
 - a) 443: SSL
 - b) 7622: SFTP (via SSH)
2. Confirm that the following hosts are available:
 - a) genius.merchantware.net
 - b) transport.merchantware.net
 - c) paycube.merchantware.net
 - d) ps1.merchantware.net
 - e) s01.merchantware.net
 - *If the device is still not functioning correctly, proceed to **Task C**.*

C) Restart the Genius device.

- Restart the Genius device by removing the AC power cord from the utility cable for 30 seconds or more, then plug the cable back in.
- *If the device is still not functioning correctly, proceed to **Task D**.*

D) Check that the Genius device has received an IP address.

1. On the Genius keypad, press **0** three times to access the **Admin** screen.
2. Use the keypad to insert the password **9416557** and press **Enter**.
3. Confirm that the **IP address** field is populated.
 - *If no IP address is populated, follow the process for configuring a static IP address as described in the FAQs.*
 - *If the device has an IP address and is still not functioning correctly, take note and proceed to **Task E**.*

E) Take a note of the device serial number.

Turn your Genius device upside-down and make a note of the serial number on the sticker.

F) Cayan support.

Contact support by calling 888.249.3220. In order to assist with your support call, please have the following information ready:

- *Your business information so that we can identify your account.*
- *The connection test results from **Task A**.*
- *The device serial number as described in **Task E**.*
- *Your **MerchantWARE** credentials.*

FREQUENTLY ASKED QUESTIONS

Who do I call for support on the Genius device, and what are the support hours?

Please contact Cayan Support by calling 888.249.3220; we are available 24/7/365.

Who do I call when I have a question about processing a credit card transaction with my POS and the Genius device?

For information on processing credit card transactions using your POS system, please contact your POS vendor.

My state requires a pole display for line items. Can Genius display line items instead?

Yes, the Genius device can display line items (SKU display) for certain POS providers.

Can I place my own custom image on the home screen?

Yes, you can customize the images on the home screen and the line item display screen.

Are there other payment types I can accept other than credit and debit?

Yes, you can accept Apple Pay, Android Pay and gift cards at this time.

Does Cayan offer an online portal to view transactions processed through Genius?

Yes, you have access to our online portal at <https://portal.merchantware.net> where you can view transactions and run reports. Your credentials will be in your MerchantWARE email.

What is the difference between a dynamic IP address and a static IP address?

A dynamic IP address is automatically assigned by your switch/router when you plug your Genius device into your network; this is the default configuration. If your network suffers a disruption, your switch/router might assign a different IP address to your device, causing a loss of communication between your Genius device and your POS system.

A static IP address does not change, and you need to manually configure it on your Genius device. We recommend this option if your switch/router is changing IP addresses frequently, and needs to be manually configured on your Genius device.

Configuring the static IP address: *Note, use the stylus to navigate the menu within the Genius screens.*

1. 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.
2. On the keypad, hold down **1**, **5** and **9** buttons together for two seconds, and then release.
3. Use the keypad to insert the password **166832** and press **Enter**.
4. On the tabs at the top of the screen, touch **Administration** and then **Communication**.
5. From the tabs at the top of the **Communications** screen, touch **Network** and then **Ethernet**.
6. From the **Ethernet** screen, touch the **edit** symbol next to **Mode**.
7. Select **staticIP** and touch **OK**.
8. 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**.*
9. Configure your **subnet mask**, **Gateway** and **DNS** settings.
10. 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.