

## 1 GETTING STARTED

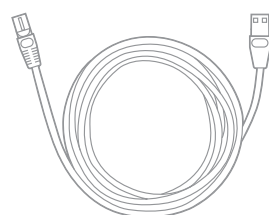
Before you install your Genius device, please complete the following tasks:

- 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.

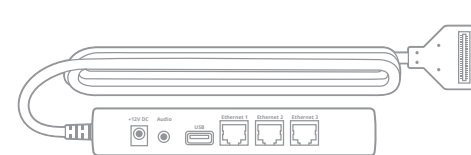
A video tutorial is available at [cayan.com/setup](http://cayan.com/setup)



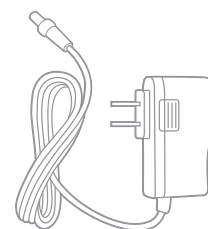
Genius device



Ethernet cable



Utility cable

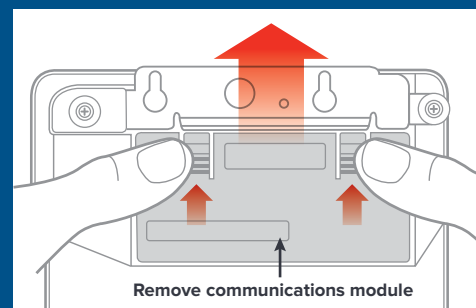


AC adapter

## 2 CONNECTING THE COMMUNICATIONS MODULE

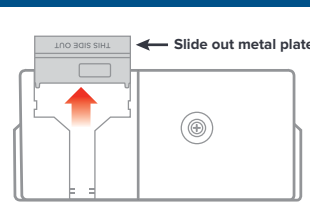
### STEP 1

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.



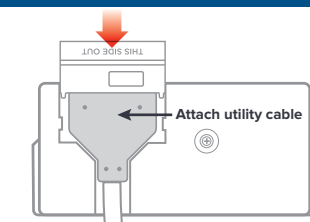
### STEP 2

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



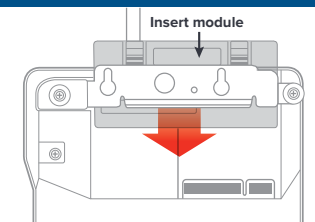
### STEP 3

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



### STEP 4

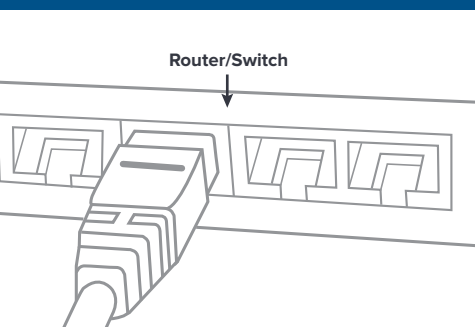
Insert the communications module into the Genius device.



## 3 CONNECTING TO THE NETWORK

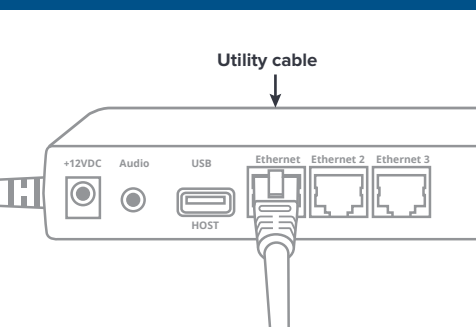
### STEP 1

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

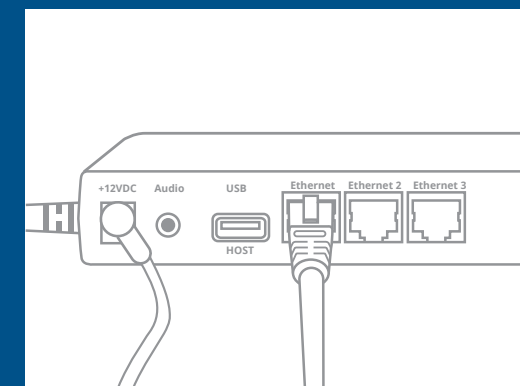
### STEP 1

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

**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 for the Genius device to connect to your router/switch.
- On the keypad, hold down **1**, **5** and **9** buttons together for two seconds, 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**.
- Use 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:**

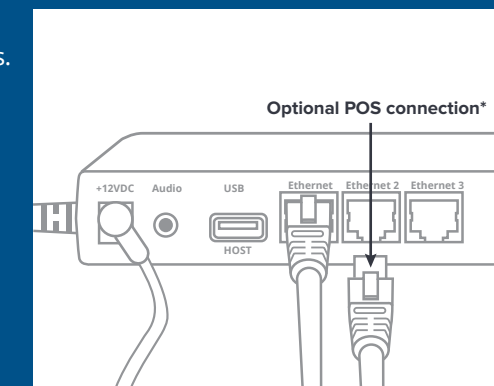
On the **Menu** path at the top of the screen, touch **Home**. Next, touch **Run App**.

\* Numbers that are less than three digits in length must be entered using preceding zeroes.  
For example: To enter the IP address 10.50.31.120 you must press 010 050 031 120.

## 6 CONFIGURING YOUR POS

- Locate your **MerchantWARE** credentials.
- Consult with your POS provider for assistance with configuring your system with the Genius device.
- 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 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.

Pharmaserv POS Support  
**800.837.4767**

Point of Sale Solution Support  
**800.872.0006**

## THE GENIUS PLATFORM

## TROUBLESHOOTING

## FREQUENTLY ASKED QUESTIONS

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) Pharmserv POS and Point of Sale Solution Support.

- Contact support by calling Pharmserv POS Support 800.837.4767 or Point of Sale Solution Support 800.872.0006 . 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**.

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

Contact Pharmserv POS Support at 800.837.4767 or Point of Sale Solution Support at 800.872.006; 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.

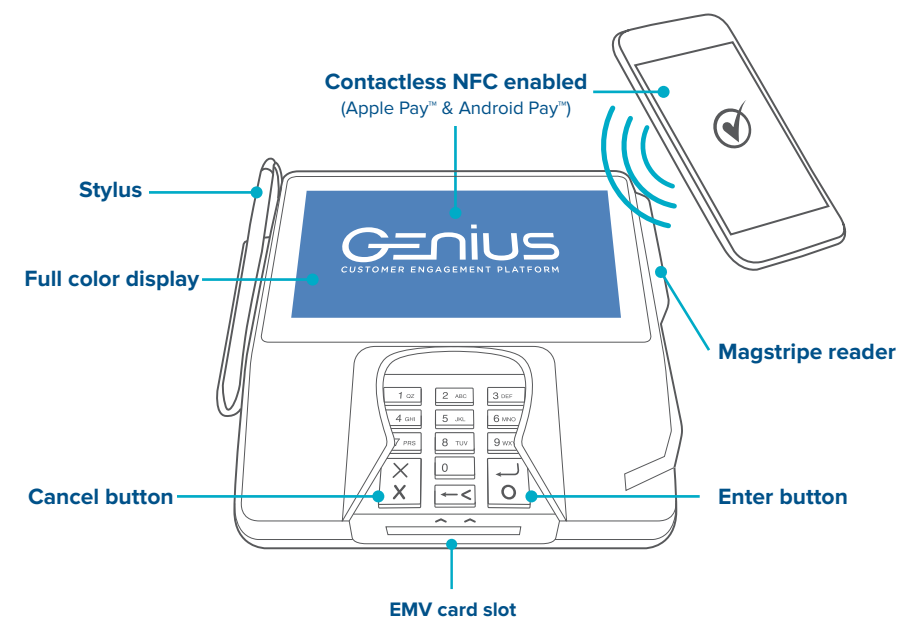
### Does Cayan offer an online portal to view transactions processed through Genius?

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.

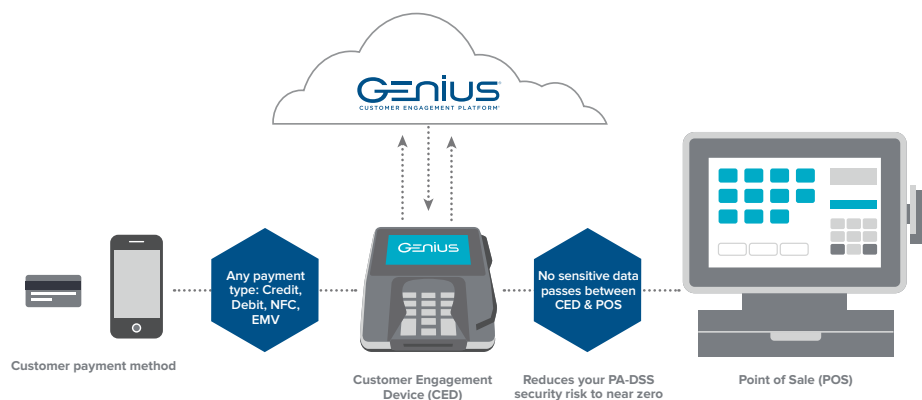
### What is the difference between a dynamic IP address and a static IP address?

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.



## HOW IT WORKS



# 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.

CAYAN