



The Genius® Customer Engagement Platform® by Cayan™ is a payment solution that meets the critical new industry mandates and standards. It also delivers other great benefits: Credit, integrated PIN Debit, digital signature capture, mobile payments such as Apple Pay and Google Wallet and EMV (EuroPay, Mastercard, and Visa).

What you'll need

- ◆ An active Cayan account and a Verifone MX 915 customer engagement device.
- ◆ Current PostalMate version.

Contact Cayan to set up an account

Email: PostalMate@Cayan.com

Phone: 800.498.0823, choose option 1.

Note: It is best to have a Cayan Genius terminal for each CashMate workstation. While this device can be networked, having only one terminal diminishes the ability to service your customers efficiently at each station. (In most stores, it would be difficult to ask a customer to step aside so another customer can process their transaction in a secure, unobtrusive manner.)

Once your account has been established, Cayan will send you the Genius customer engagement device, pre-programmed with your account information, and you'll be ready to set up.

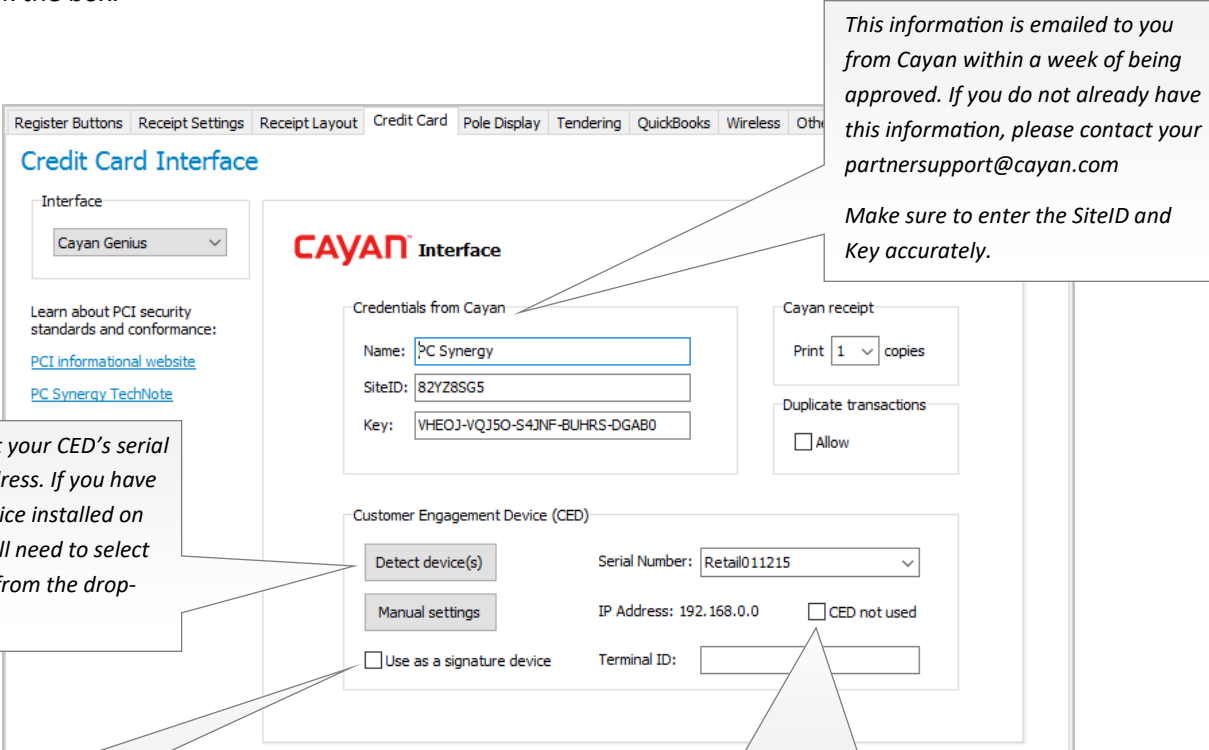
Set Up Cayan Genius Customer Engagement Device.

1. Follow the Genius Quick Start Guide included with your Verifone MX915 to set up the customer engagement device on your network. (This device does not plug into your computer directly.)
2. If you encounter any issues setting up the hardware, please contact Genius Terminal Support at 1.888.249.3220.

CashMate POS Setup

Note: After initially setting up the Genius terminal (CED) you may need to wait several minutes before setting up in CashMate. Be sure to close and re-open CashMate so the program can see the new device.

1. In the CashMate register, choose **Tools > Options > Register Settings**.
2. Select the **Credit Card** tab.
3. Enter your credentials from Cayan.
4. Select the serial number of the device you will use on this station. See page 3 of the Cayan Quick Start Guide below “Verifying Genius Readiness” for information on how to log into your device and verify the IP address.
5. Select how many receipt copies you wish to print.
6. If you wish to allow sales for the same credit card number, same dollar amounts on the same day, check the box.



Credit Card Interface

Interface: Cayan Genius

Learn about PCI security standards and conformance:
[PCI informational website](#)
[PC Synergy TechNote](#)

CAYAN Interface

Credentials from Cayan

Name: PC Synergy
 SiteID: 8ZY28SG5
 Key: VHEOJ-VQJ350-S4JNF-BUHR5-DGAB0

Cayan receipt

Print 1 copies

Duplicate transactions

Allow

Customer Engagement Device (CED)

Serial Number: Retail011215

IP Address: 192.168.0.0 CED not used

Use as a signature device Terminal ID:

This information is emailed to you from Cayan within a week of being approved. If you do not already have this information, please contact your partnersupport@cayan.com

Make sure to enter the SiteID and Key accurately.

Click here to detect your CED's serial number and IP address. If you have more than one device installed on your network, you'll need to select the correct device from the drop-down menu.

The CED device can also be used as a signature device for PostalMate's Package Receiving feature. Check this box if you wish to enable this device for this feature.

Typically, this box will remain unchecked. The only time you would not use a CED device is if it is physically not working and you have a specially configured alternate swiping device (obtained from Cayan) to swipe credit cards.

Using Genius in CashMate

On the Register Total screen, select the Credit Card tender being used.

Register Total: \$27.00

Enter amount paid

27.00

7	8	9
4	5	6
1	2	3
0	00	

Clear

Customer: None selected

\$5	Credit Card
\$10	
\$20	
\$50	GiftCert

Totals

Subtotal:

Sales Tax:

TOTAL DUE:

Amount Paid:

Process Payment

Method

Use CED Enter via Cayan website Use saved payment info

The Customer Engagement Device (CED) is enabled and ready.

X Cancel

Note: The all-in-one Credit Card tender type will automatically detect which tender type is being used on the Genius Customer Engagement Device (CED).

*You may set this up in CashMate under **Tools > Options > Register Settings**. Choose the **Register Buttons** tab and select **Tender Types**. Select the tender you wish to replace and choose **Credit Card** from the list. For other individual tenders you wish to clear, choose the tender button and select **Clear**. Click **Finish** when done.*

This screen will display in CashMate, while the Genius CED will prompt your customer to select their payment method and complete their transaction.

Supports EMV as well as debit cards with PIN-based transactions



Works with Apple Pay, Google Wallet and other mobile payment options



Touch screen signature capture



Register Transaction History

Credit card payment details can be found in Register History. **Tools > Register Transaction History**
 Highlight the transaction and click the **Payment info** button.

Register Transaction History

From date: 3/ 1/2017 To date: 3/ 8/2017 Register station(s) to view: ALL Receipt contains: colette Search

RegID	Date/Time	Amount	Customer	UserName	Workstation
268538	3/7/2017 5:53:03 PM	\$5.27	OLIVIA AMANHYIA	Colette Tariqi	left front
268476	3/6/2017 5:36:16 PM	\$0.59		Colette Tariqi	left front
268475	3/6/2017 5:22:38 PM	\$45.05	ALAN IBARRA	Colette Tariqi	RIGHT FRONT
268474	3/6/2017 5:13:57 PM	\$18.85	MARK LOEFFLER	Colette Tariqi	RIGHT FRONT
268472	3/6/2017 5:06:10 PM	\$20.59	BELLITIRE	Colette Tariqi	RIGHT FRONT
268469	3/6/2017 4:52:47 PM	\$43.22	STEVEN REMM	Colette Tariqi	RIGHT FRONT
268468	3/6/2017 4:42:59 PM	\$10.69	JACOB ROCCHI	Colette Tariqi	RIGHT FRONT
268465	3/6/2017 4:29:22 PM	\$1.00		Colette Tariqi	RIGHT FRONT
268418	3/4/2017 3:41:32 PM	\$13.99		Colette Tariqi	RIGHT FRONT
268417	3/4/2017 3:18:12 PM	\$4.31		Colette Tariqi	RIGHT FRONT
268415	3/4/2017 3:06:15 PM	\$5.04	MELODY TRILOFF	Colette Tariqi	left front

Click the **Payment info** button to see the payment details.

Shipment-----
 FedEx Priority Overnight Envelope
 Ship To:

Account: Visa ending with 1986

Details

Card holder: ALLEN
 Type: Visa
 Amount: \$45.05
 TroutD: 16eb1ef5-391f-4993-a49c-77b94d
 Token: 658316225
 Ticket: 820925
 Signature:

Close Help

Returns

To process a return to a credit card, you'll need to know the date the original transaction was processed and select it from Register Transaction history. Returns can only be processed to the original card that was used. It will be useful to have the receipt for returns.

Process the return in CashMate as normal. On the **Register Total** screen, select the Credit Card tender. The **Register Transaction History** screen will display, allowing you to select the date for the transaction and highlight the original transaction. The **Payment Info** button is available here to confirm the information as needed. Click **OK** and the return will process.

Stored Credit Cards

Credit card information can be stored and recalled for POS transaction payments and returns. The information is not stored in PostalMate; it's stored on secure Cayan servers, which can be accessed through PostalMate when needed for transactions—so your computers are not holding sensitive information that could potentially be hacked. Multiple cards per customer can be stored.

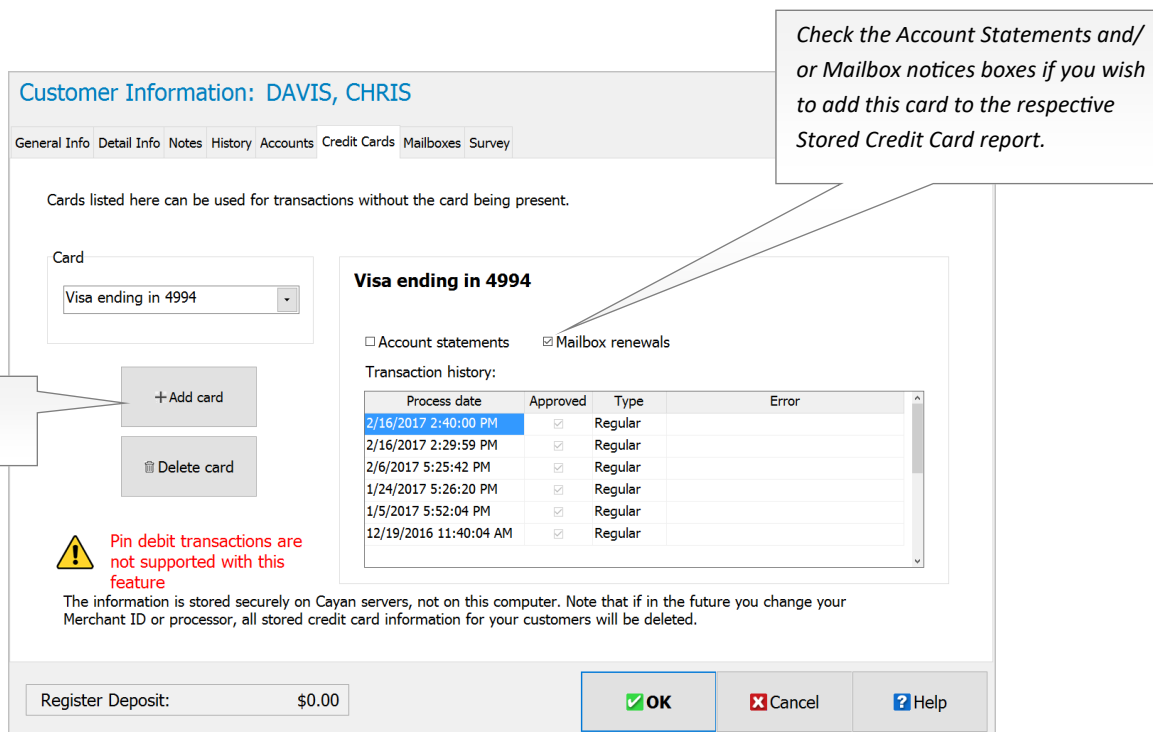
Use of this feature requires Security to be enabled and set up in PostalMate. See TechNote titled [Security Settings](#) for more information on how to set up Security. (In Access Rights, make sure that "Saved credit card" is checked for any user that will be using this feature.)

Using this feature

Adding and saving card information can only be done from the POS register, and with a user logged in who has saved credit card access rights.

Adding and saving card information from the Edit > Customer screen

1. From the POS register, go to **Edit > Customer**.
2. Select the desired customer and click the Edit button.
3. Click on the **Credit Cards** tab.



Customer Information: DAVIS, CHRIS

General Info Detail Info Notes History Accounts Credit Cards Mailboxes Survey

Cards listed here can be used for transactions without the card being present.

Card
Visa ending in 4994

+ Add card
Delete card

Visa ending in 4994

Account statements Mailbox renewals

Transaction history:

Process date	Approved	Type	Error
2/16/2017 2:40:00 PM	<input checked="" type="checkbox"/>	Regular	
2/16/2017 2:29:59 PM	<input checked="" type="checkbox"/>	Regular	
2/6/2017 5:25:42 PM	<input checked="" type="checkbox"/>	Regular	
1/24/2017 5:26:20 PM	<input checked="" type="checkbox"/>	Regular	
1/5/2017 5:52:04 PM	<input checked="" type="checkbox"/>	Regular	
12/19/2016 11:40:04 AM	<input checked="" type="checkbox"/>	Regular	

! Pin debit transactions are not supported with this feature

The information is stored securely on Cayan servers, not on this computer. Note that if in the future you change your Merchant ID or processor, all stored credit card information for your customers will be deleted.

Register Deposit: \$0.00

OK Cancel Help

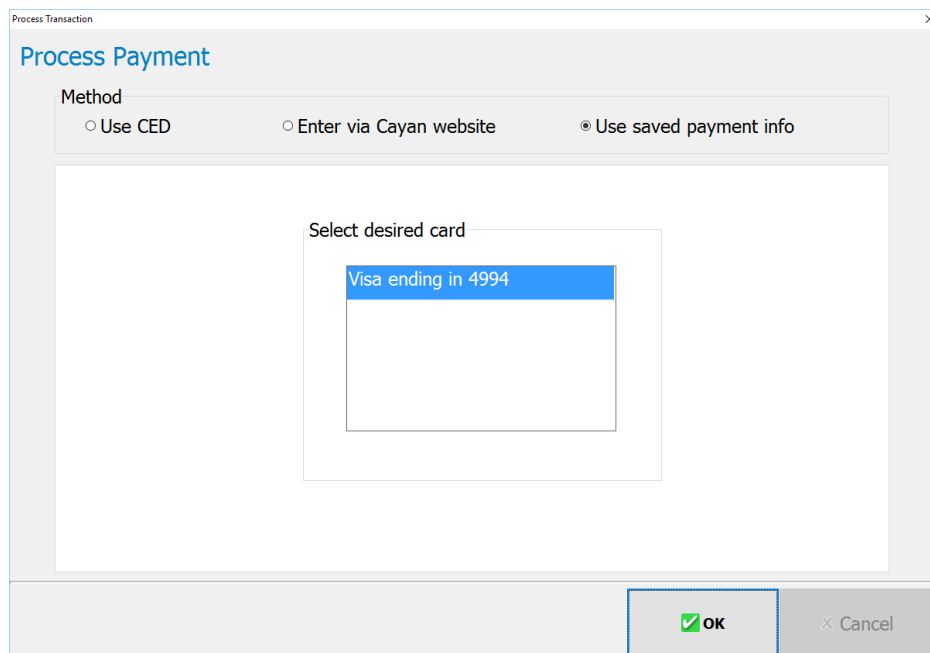
Check the Account Statements and/or Mailbox notices boxes if you wish to add this card to the respective Stored Credit Card report.

To add a credit card, click here.

4. Click the **Add** button. You'll see a message box informing you that a \$1.00 transaction will be generated and voided. Click **OK** to confirm.
5. Swipe the card or manually enter the information, then click **Process**. The card will appear in the list, showing the last four digits only.
6. Optionally, check the "Accounts statements" and/or "Mailbox notices" boxes if the customer wants you to use the stored card info to process payments for those things on their behalf. This will add the cards to the "Stored Credit Cards" reports in CashMate and in the Mailbox Manager, respectively.
7. Click **OK**.

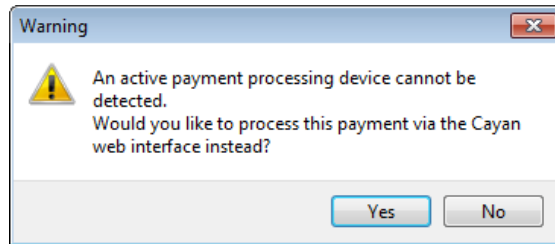
Using Saved card info for a payment or return.

1. You must be logged in as a user with "Saved Credit cards" access rights.
2. Link a customer to the POS transaction.
3. On the **Register Total** screen, click the **Credit Card tendering** button.
4. Select **Use saved payment info**.
5. Select the desired card from the list.
6. Click **OK**.



If there is hardware trouble...

In the event that the Genius device is not able to connect, or there are other hardware issues, CashMate will prompt you to use the Cayan web interface.



Select **Yes**, and this screen will display:

