

# Setting up and Using Genius with POS

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## Integration Overview

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Integrating with the Merchant Warehouse Genius Customer Engagement Device (hereafter referred to as Genius) is quick and easy.

After the initial hardware setup is complete, you will be ready to configure the ReSource software to use it. (Should you run into any difficulty, or would prefer to have ReSource complete the setup, please call 800-818-0492 to make an appointment).

You will need the following pieces of information, which should be supplied to you by Merchant Warehouse:

- Your Merchant Name
- Your Merchant SiteID
- Your Merchant Key
- The IP address for the Genius device

## Connecting Genius

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In the package with Genius is a large complicated cable, pictured below. Set this off to the side, it is not needed.



You will only need to connect the power supply, and an Ethernet cable to the back of the device. The Ethernet cable goes into the socket closest to the middle of the device, and closest to the power as shown below.



The other end of the Ethernet cable is connected to an available port on your network router or switch, not directly connected to your computer.

## Getting the IP Address from the Genius device

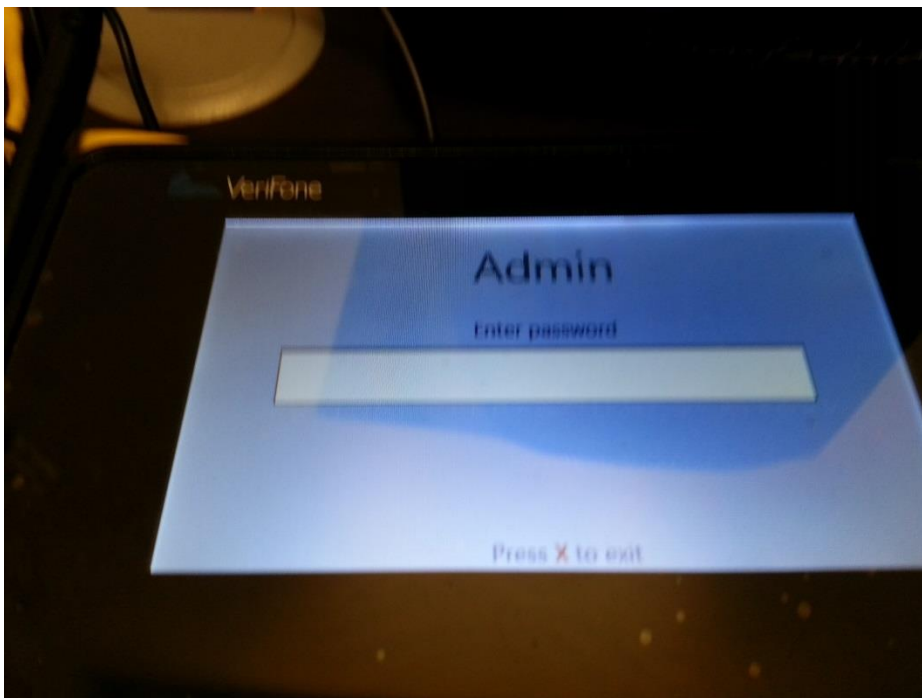
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In order for the ReSource program to communicate with Genius, we need to know the IP Address the device is using. IP Addresses are what computers use to find each other over networks. When you connect Genius to your network, it will find an available IP Address automatically, but we cannot predict what that will be.

To determine what IP Address Genius has found, follow these steps.  
Press 000 on the number pad.



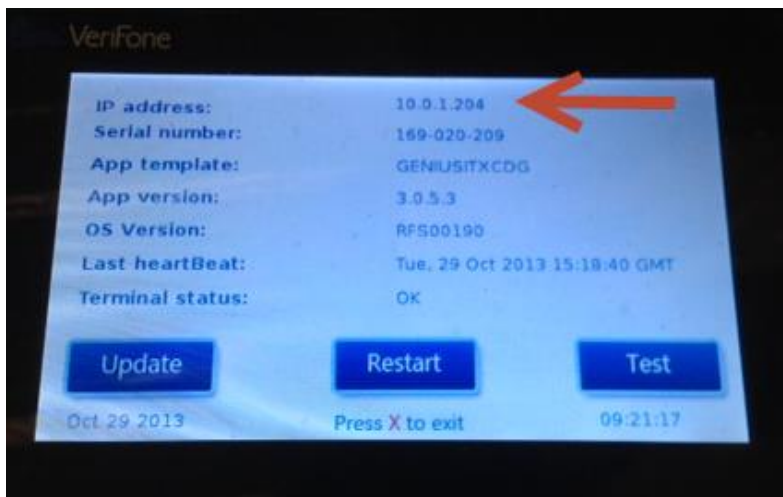
The display will change and prompt you to enter the Admin password.



Enter 9416557, and click the Enter button (the one with the green circle, pictured below).



Some configuration information will be displayed on the screen. Write down the IP Address.



Click the Cancel button (The one with the red X, outlined at the top of the page in red), or wait for a minute or two and the screen will go back to the normal display.

## Entering Setup Information

Start the ReSource program, and go to File, Program Setup, Store Information. Click the General tab, then the Credit Card Options tab.

Select Merchant Warehouse CED from the Credit Card Integration Option Drop-down list.

Validation options		Credit Card Integration Option	Encryption Option
<input checked="" type="checkbox"/> Use Credit Card Integration		Merchant Warehouse CED	ICV 4.0.3 - 4.0.4
<input checked="" type="checkbox"/> Require CC Number Entry		MSN (PC Charge)	Part. Resp.
<input type="checkbox"/> Use CVV2/CVC2 codes		ICVerify v 4+	<input checked="" type="radio"/> Dollars
Processing Node: <input type="text" value="0"/> Process		ICVerify v 4+ FDMS Nashville	<input type="radio"/> Pennies
Merchant Warehouse Setup		ICVerify v 4+ Paymentech	
Device IP Address	10.0.0.0	ICVerify v 4+ FDMS Cardnet	Test ReSource Software
Merchant Site ID	22222222	ICVerify v 4+ TSYS	22222-22222-22222-22222-22222
		ICVerify v 4+ RBS Lynk Systems	
		Merchant Warehouse CED	

Enter the IP Address for the Genius device, the Merchant Name, Merchant Site ID, and Merchant Key in the fields provided.

Merchant Warehouse Setup			
Device IP Address	10.0.0.0	Merchant Name	Test ReSource Software
Merchant Site ID	22222222	Merchant Key	22222-22222-22222-22222-22222

Click Save, then Click Done. Setup is complete.

## Using Genius at the Point of Sale

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Begin the process like any other Credit Card transaction. The Credit Card entry form will be familiar to you if you have used other integration methods, however there are some changes.

Charge Card, Sale

Charge Card Keyed Entry Check Guarantee Settlement Manual

KeyPad

Credit Card

Manual Approval

Your Card Name Here

Click Apply to start transaction

Apply

Close

Sale Amount:

Card Holder Street Address: 320 Fairhope Ave

Card Holder ZIP Code: 36532

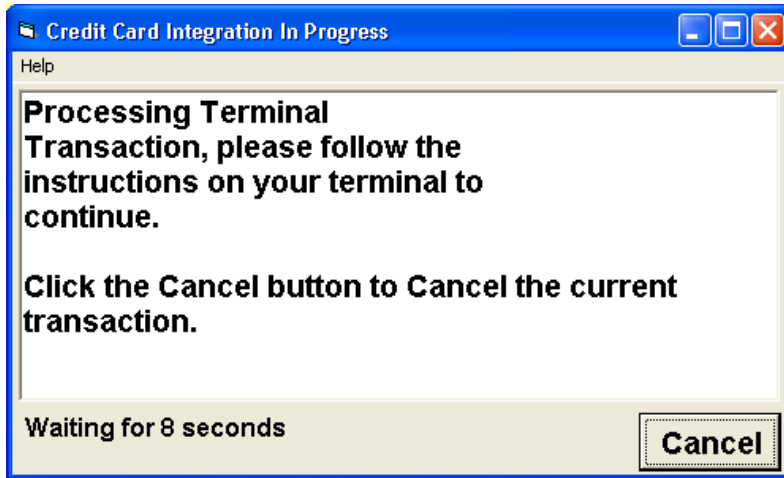
Tax Amount: 9.28 Tax Exempt #:

You do not need to enter the card number here.

However, you may need to enter the Card Holder Street Address and Card Holder Zip Code if a customer was not selected for the transaction or those details are missing from their Customer record.

Click **Apply** to initiate the transaction on the Genius device.

The ReSource screen will display a Credit Card Integration in Progress window with a message that the device has been engaged and direct you to wait for processing to complete there.



If you need to Cancel the transaction, you may click the button on the POS screen, or use the dedicated button on the device.

Follow the instructions on the device to complete the transaction. When the transaction is complete, you will be back at the POS credit card form, and the status of the Payment will be shown.



Click **Apply** again, and the program will print or preview the Credit Card receipt as normal.



## Refunding Transactions with Genius

When you refund a transaction that was processed through Genius, you do not need the card number. Instead a reference number, called the Token, for the original transaction is used. The program will automatically fill this in for you when refunding a Genius transaction; you just need to click the Apply button to continue.

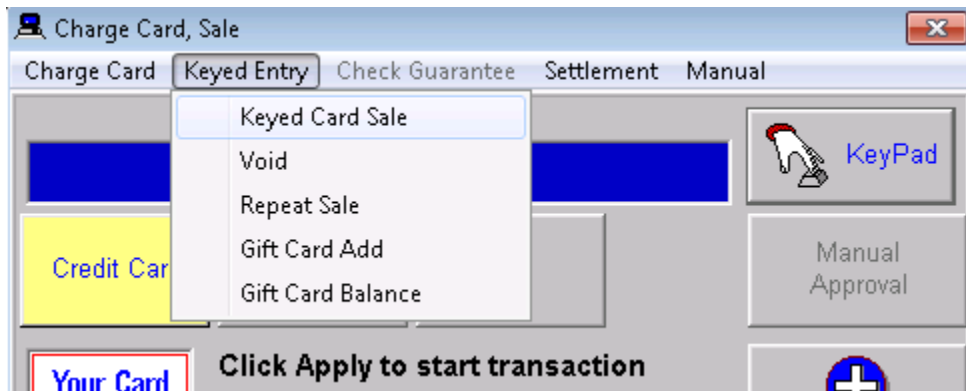
The screenshot shows a software window titled "Charge Card, Credit /Return" with a menu bar containing "Charge Card", "Keyed Entry", "Check Guarantee", "Settlement", and "Manual". The interface includes a keypad icon labeled "Keypad", a "Credit Card" button, a "Manual Approval" button, and a prominent "Apply" button with a plus sign. A "Close" button with a minus sign is also present. A text prompt reads "Enter Token and Click Apply" above a text field containing the token "124843467". To the left, a card number "1234 5678 9012" is displayed above a label "SWIPE CARD OR TYPE". At the bottom, there are input fields for "Sale Amount:", "Card Holder Street Address:", "Card Holder ZIP Code:", "Tax Amount:", and "Tax Exempt #:".

Refunding transactions that were not processed through the CED is not supported.

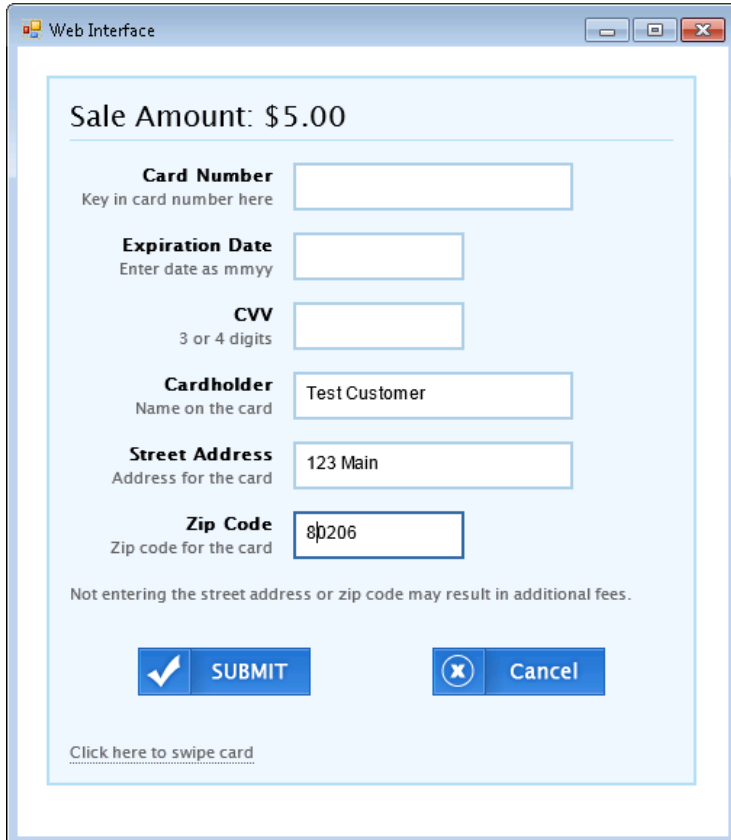
# Manual Transaction Processing

In case of technical problems with the device, there is an alternate method to run a transaction through your Merchant Warehouse account.

From the Credit Card window, select the Keyed Entry menu, Keyed Card Sale.



Click **Apply**, the Credit Card Integration in Progress window will appear, and then the Manual Credit Card entry form will appear.

A screenshot of a "Web Interface" window showing a manual credit card entry form. The form is titled "Sale Amount: \$5.00". It contains several input fields: "Card Number" (with a placeholder "Key in card number here"), "Expiration Date" (with a placeholder "Enter date as mmyy"), "CVV" (with a placeholder "3 or 4 digits"), "Cardholder" (with a placeholder "Name on the card" and the value "Test Customer"), "Street Address" (with a placeholder "Address for the card" and the value "123 Main"), and "Zip Code" (with a placeholder "Zip code for the card" and the value "80206"). Below the fields is a note: "Not entering the street address or zip code may result in additional fees." At the bottom, there are two buttons: "SUBMIT" (with a checkmark icon) and "Cancel" (with an 'X' icon). A link "Click here to swipe card" is located at the bottom left.

Fill in the Card number, Expiration Date, and CVV code, and click Submit.

The transaction will be processed, and a status screen will appear.

Click Close on the Status screen, and the transaction details will appear on the Credit Card screen and you can continue processing normally.

## Changes to Batch Payments

Merchant Warehouse uses a token system that allows you to charge again to a previously used credit card using the token (reference to the previous transaction). The Batch Payment screen and process have been updated in this version to make use of that option.

In order to be able to use a stored credit card for Batch Payments in the future, it will be necessary to have run a transaction against that card through Merchant Warehouse to save the initial token. Either through the CED, or as a Keyed Card Sale. When the Batch Payment form is shown it will display any payments that cannot be processed because a token is not found for that card and Customer combination with the card number in red.

A red Cardnumber indicates a transaction has not been processed through Merchant Warehouse for this card yet, and you will need to process this card number manually once before using it for batch payments.

Customer	Card Number	Exp.	Balance	Charge Amount	Process	Status
CK Collection	4012...0026	1216	1042.27	1042.27	Y	Start

Running a credit card transaction manually for those cards will store the token for any future sales.