Installation and User Manual

M&M V9 Customer Info Capture System – v2.x

For Retail Pro® 9-Series v9.2, 9.3

and

iPad or Windows Tablet

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Overview

The M&M Customer Information Capture system consists of three pieces of software: Customer Info Capture App, M&M RPro Data Service and the Customer Capture Plugin.

Customer Info Capture App (iPad)

The Customer Info Capture App for the iPad is installed directly from the Apple App store.

The App is named RPCustInfo. It is a free App.

Customer Info Capture App (Windows)

The M&M Customer Information Capture App is installed on a Windows tablet, notebook or PC. The app can be installed on any system running Windows 8.1.

The App is not available from the Windows store. It is a stand-alone exe that is copied to the tablet and run on the tablet.

M&M RPro Data Service

The Customer Information Capture App requires the M&M RPro 9 Data Service. The data service is a utility program that is installed on the store's Retail Pro server. It acts as a bridge between the app and the Retail Pro database. The data service requires a license file.

Customer Capture Plugin

The Customer Capture Plugin is installed in the Retail Pro system.

For the iPad, the plugin includes a setup section and is required.

For both apps, the plugin allows the cashier to place customers who have entered their information using the App on the current Receipt.

Installation

All required software is provided in the MMCustCaptSystem-vX.X zip where X.X is the version number.

M&M RPro Data Service

Extract MMRProDataSvc.exe from the zip to any directory on the target system. The system MUST have access to the RetailPro9 directory and the Retail Pro Oracle database.

Extract ChilkatDelphiXE.dll and SIDGenerator.dll from the zip to the same directory as the M&M RPro Data Service. These DLLs do not have to be registered. They only need to be placed in the directory.

The data service should be configured so that it automatically restarts when the system reboots. This can be done using the Windows Task Scheduler and using a /U as a command line parameter.

The license file should be copied to the plugins folder under the RetailPro9 directory.

Customer Information Capture App (iPad)

Download the RPCustInfo app directly onto the iPad.

Customer Information Capture App (Windows)

Extract the MMV9CustCaptApp.exe from the zip file. The exe is installed on any system or tablet with Wifi access to the system where the M&M RPro Data Service is installed.

Customer Capture Plugin

Extract the MMCustCapt.dll, MMCustCapt.mnf and MMCustCapt.bmp files from the zip.

Copy both files to the plugins directory.

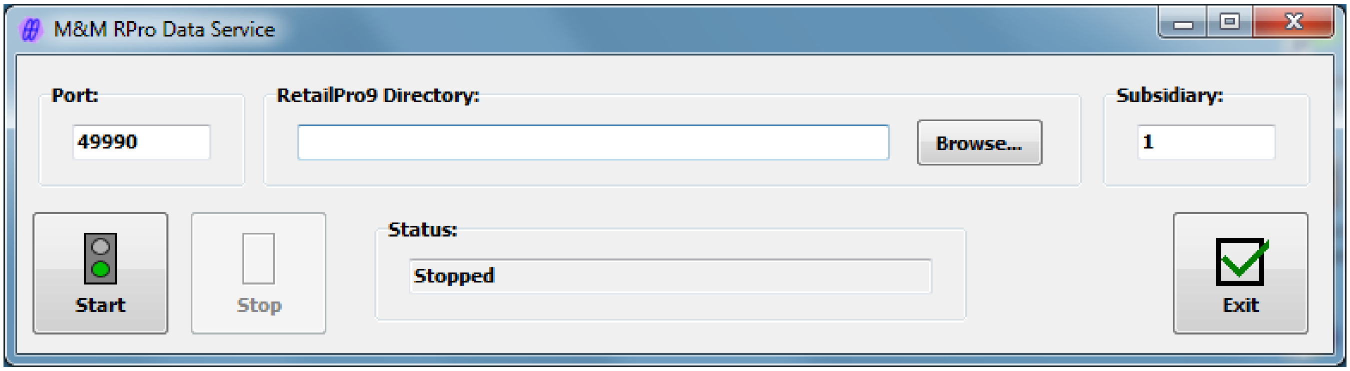
Retail Pro Menu Setup

In Retail Pro go to the Receipt Form View screen and add the “Registered” button to the side menu.

Operation

M&M RPro Data Service

Start the data service:



The port number should not be changed unless there is a port conflict on the system.

Enter or browse for the location of the RetailPro9 directory.

Enter a subsidiary number. Subsidiary is only used for some operations. It will does not affect the Customer Capture App.

Click the Start button to start the data service.

When minimized, the service will minimize to the system tray. Double click the purple M&M icon to bring it back into view.

If the service is started and a socket error is displayed, it usually means that the service is already running.

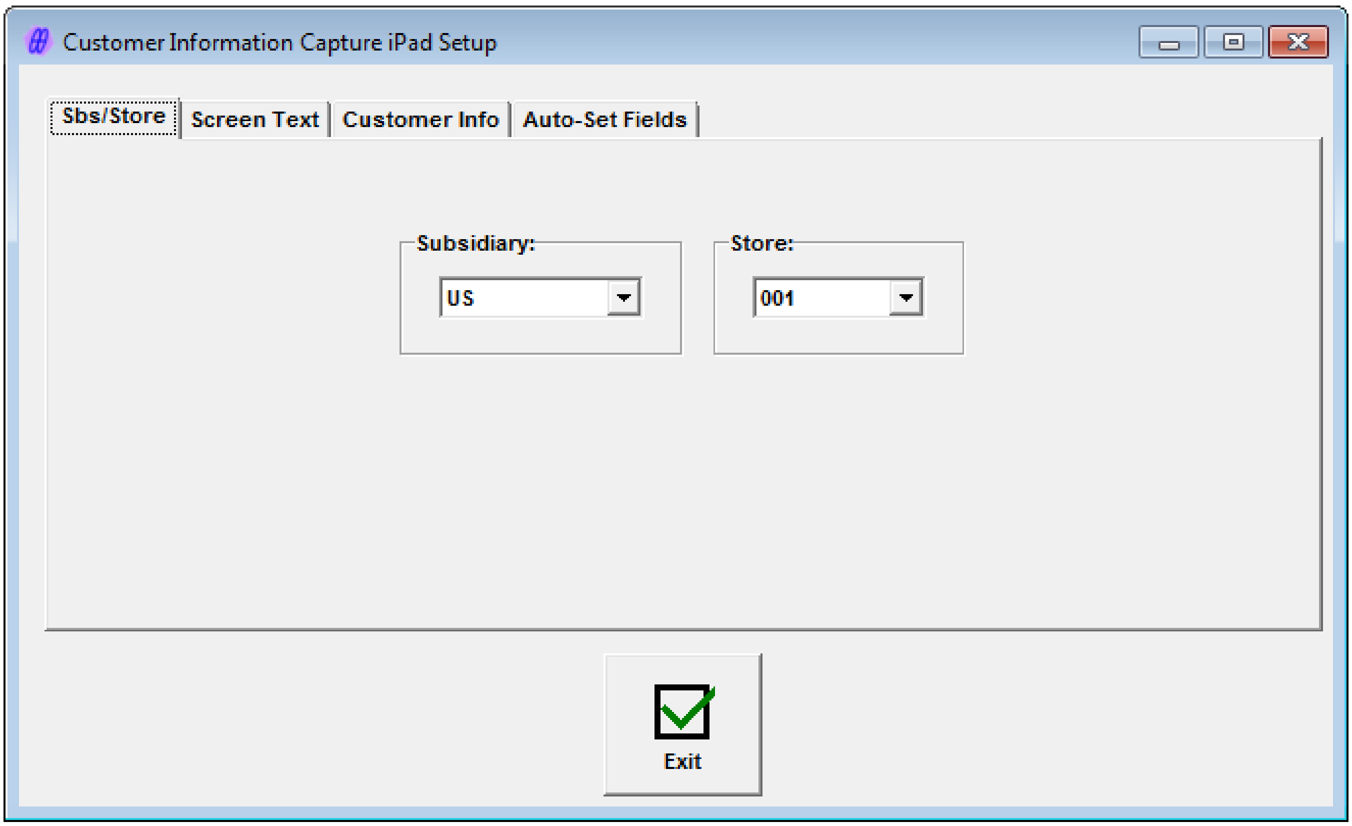
Customer Capture App (iPad)

Preparing A Logo File

The Customer Capture App will display a logo on the Customer Capture screen. Use of the logo is optional. The logo must be a JPEG format file with .jpg extension. The height and width should not exceed 200 pixels.

Setup

Setup for the iPad App is done from Retail Pro using the Customer Info Capture plugin. From Workstation Preferences, select "Customer Info Capture iPad Setup" in the User Interface Plug-ins section. The Setup screen will be displayed:

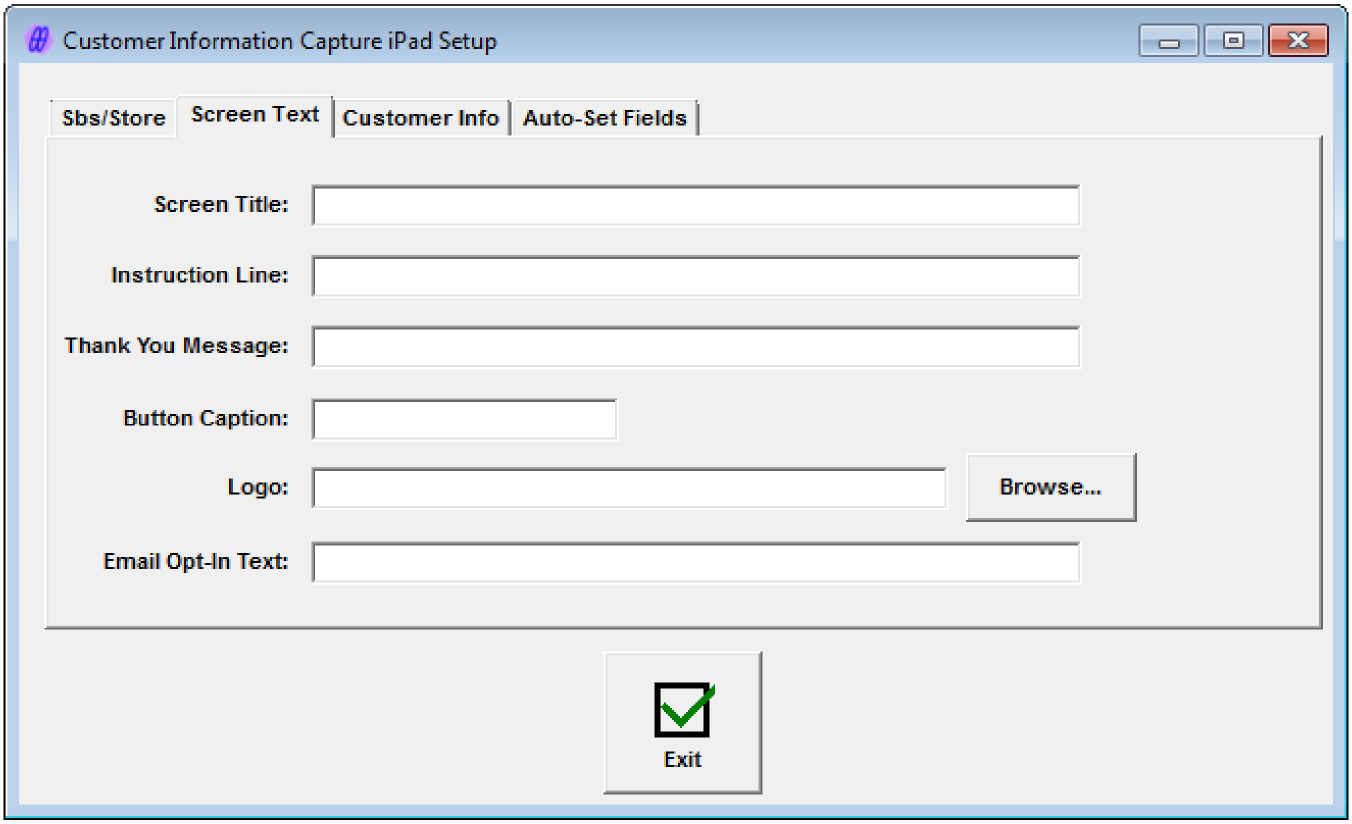


The Setup screen has 4 tabs: Sbs/Store, Screen Text, Customer Info and Auto-Set Fields.

Sbs/Store

Select the Subsidiary and Store of the local Retail Pro system from the drop downs.

Screen Text



The information that is displayed on the information capture screen on the iPad is entered on the Screen Text tab.

Screen Title – Text that is displayed on the top line of the screen.

Instruction Line – Text that is displayed on the second line of the screen.

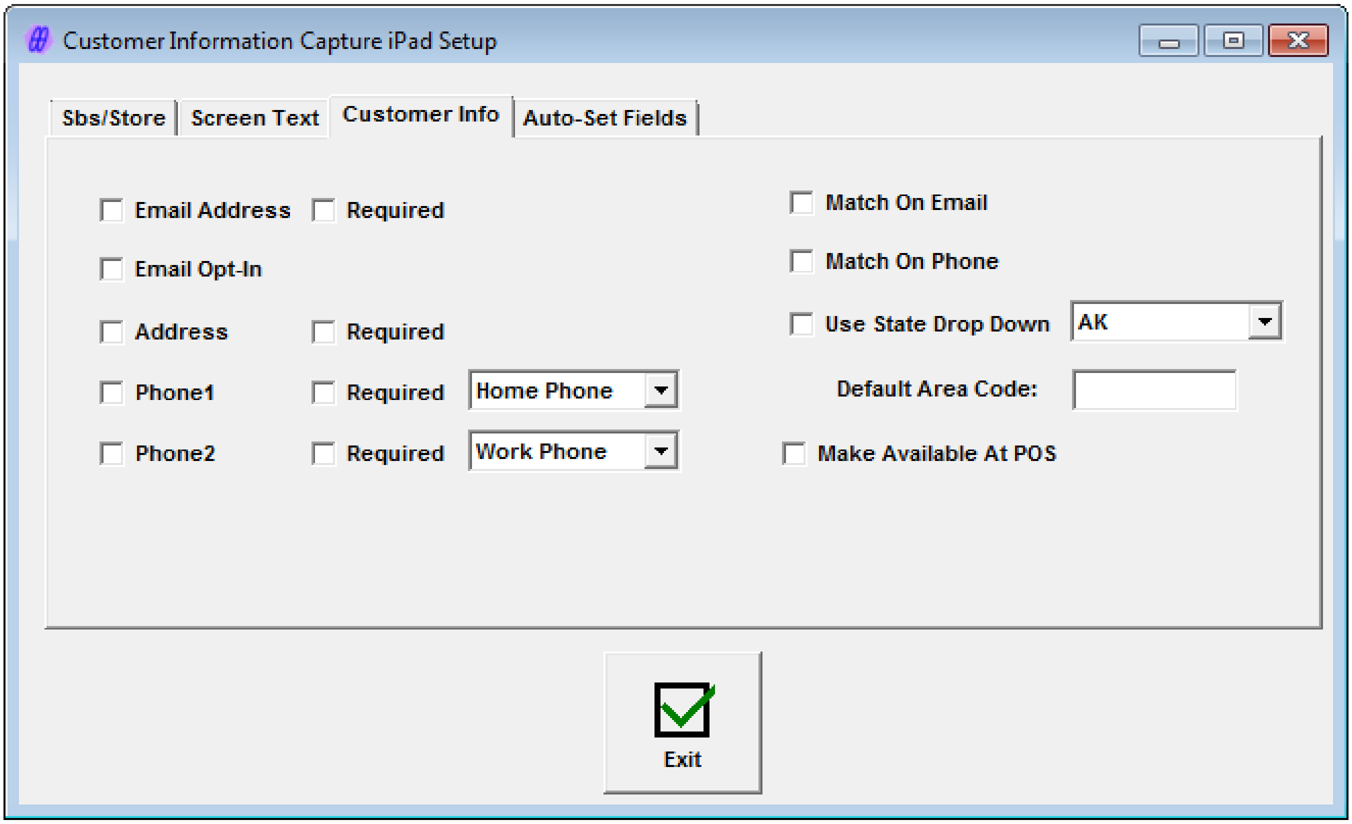
Thank You Message – The text that is displayed to thank the customer for entering their information. (This defaults to "Thank You!").

Button Caption – Caption that should be used for the Register button.

Logo – If a logo file will be used, enter or browse for the logo file. The logo file must be a jpg or png file.

Email Opt-In Text – The app can capture email addresses and opt-in permission (Yes/No). If opt-in will be captured, this is the text of the opt-in permission line.

Customer Info



The Customer Info Tab is used to specify what customer information is captured and what is required.

Email Address/Required – If checked, the email address is captured. If Required is checked, it is required.

Email Opt-In – If checked, the email opt-in text is displayed along with Yes/No selection.

Address/Required – If checked, entries for Address1, Address2, City, State and Zip are displayed. If Required is checked, at least one address line, city, state and zip are required.

Phone 1/Required/Label – If Phone 1 is checked then entry for RPro phone1 is displayed. If required is checked, the phone number is required. The drop-down is the phone1 label and is one of Home Phone, Work Phone or Cell Phone.

Phone 1/Required/Label – If Phone 2 is checked then entry for RPro phone2 is displayed. If required is checked, the phone number is required. The drop-down is the phone2 label and is one of Home Phone, Work Phone or Cell Phone.

Match On Email – If checked, then email address matching is used to determine if this is a new customer. New customers are added to Retail Pro.

Match On Phone – If checked, then phone numbers are used to determine if this is a new customer.

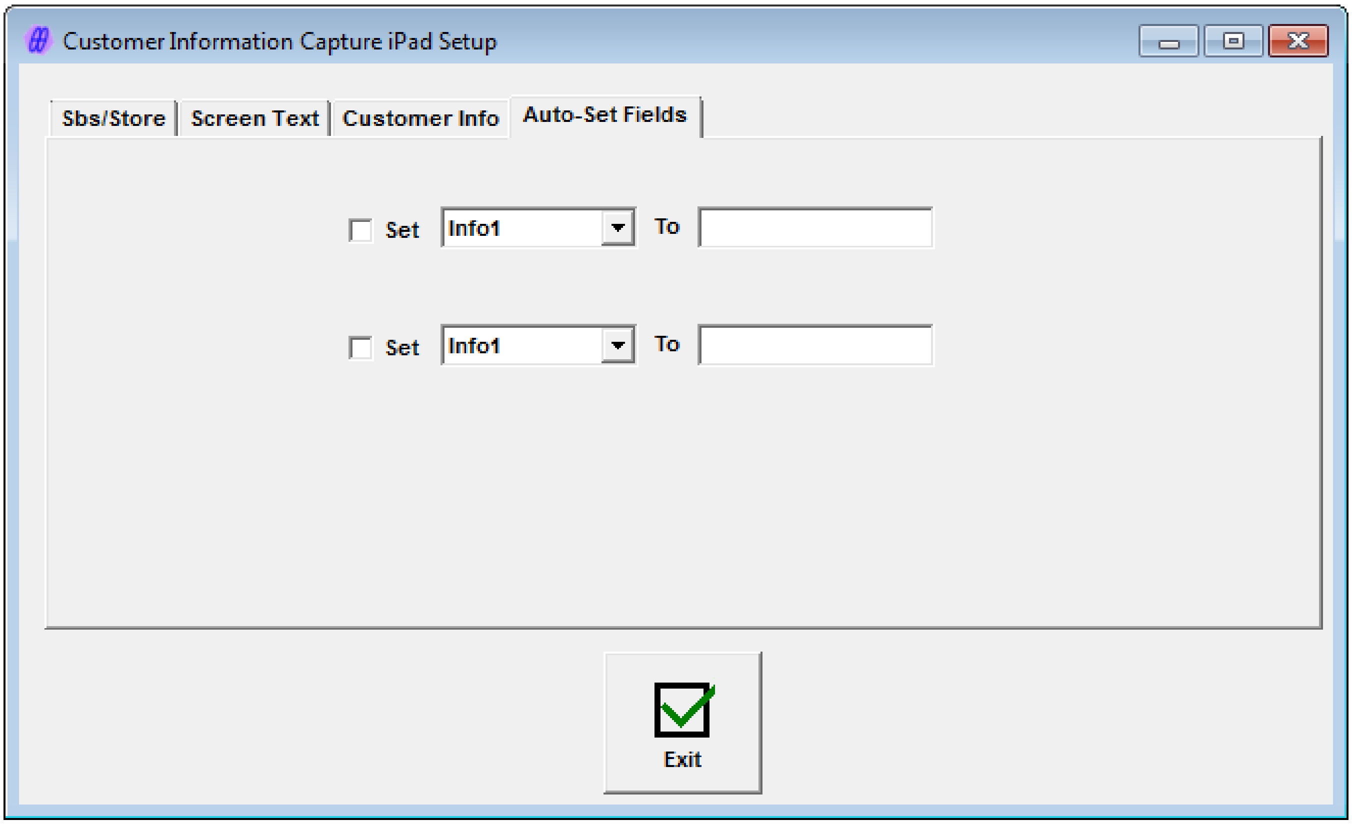
If Match On Email is checked, then email must be captured. If Match On Phone is checked, then at least one phone number must be captured. Match On Email and Match On Phone can both be selected.

Use State Drop-Down – If checked, then the State is selected from a drop-down list. Otherwise, a free form text entry box is used. If Use State Drop Down is checked, the default State selection is set by selecting a state from the drop-down.

Default Area Code – The default area code is used when a customer does not enter their area code. Use of the default area code is optional.

Make Available At POS – If checked, then the customer is made available at POS to be placed on a receipt after registering. Check this box only if the Customer Capture Plugin will be used.

Auto-Set Fields



Auto-Set fields is a method of automatically setting up to two fields in the customer record when the customer is registered.

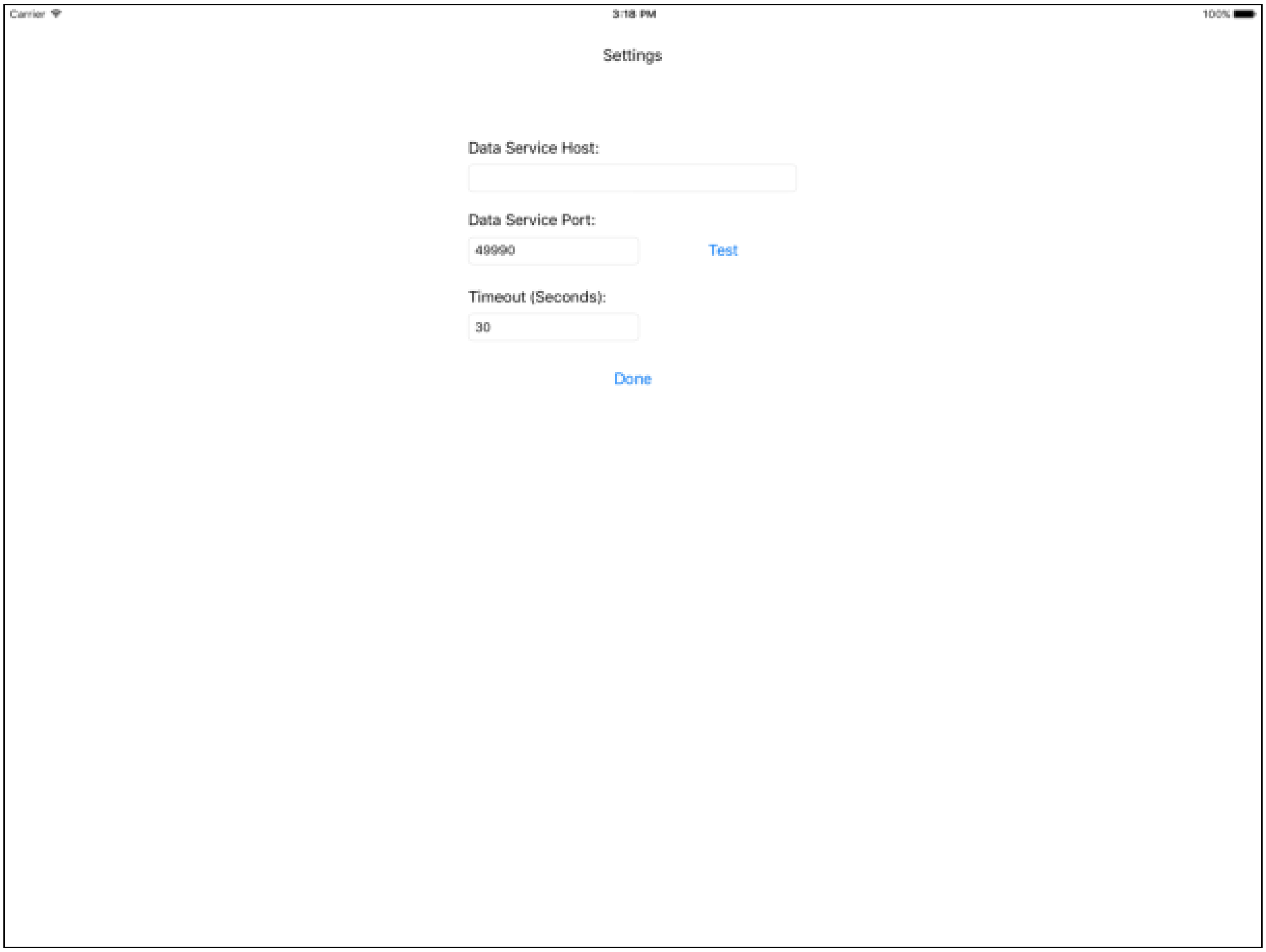
To use Auto-Set fields, check the one or both Set boxes, select a field from the drop-down and enter the setting.

Field selections are Info1, Info2, UDF3, UDF4, UDF5, UDF6, UDF7, UDF8, Aux1, Aux2, Aux3, Aux4, Aux5, Aux6, Aux7, Aux8, Aux9, Aux10, Aux11, Aux12.

Running The iPad App

Start the app. If the Settings have not been entered, the Settings screen is displayed.

Settings Screen



For Data Service Host, enter the IP Address of the system where the MMRProDataSvc is running.

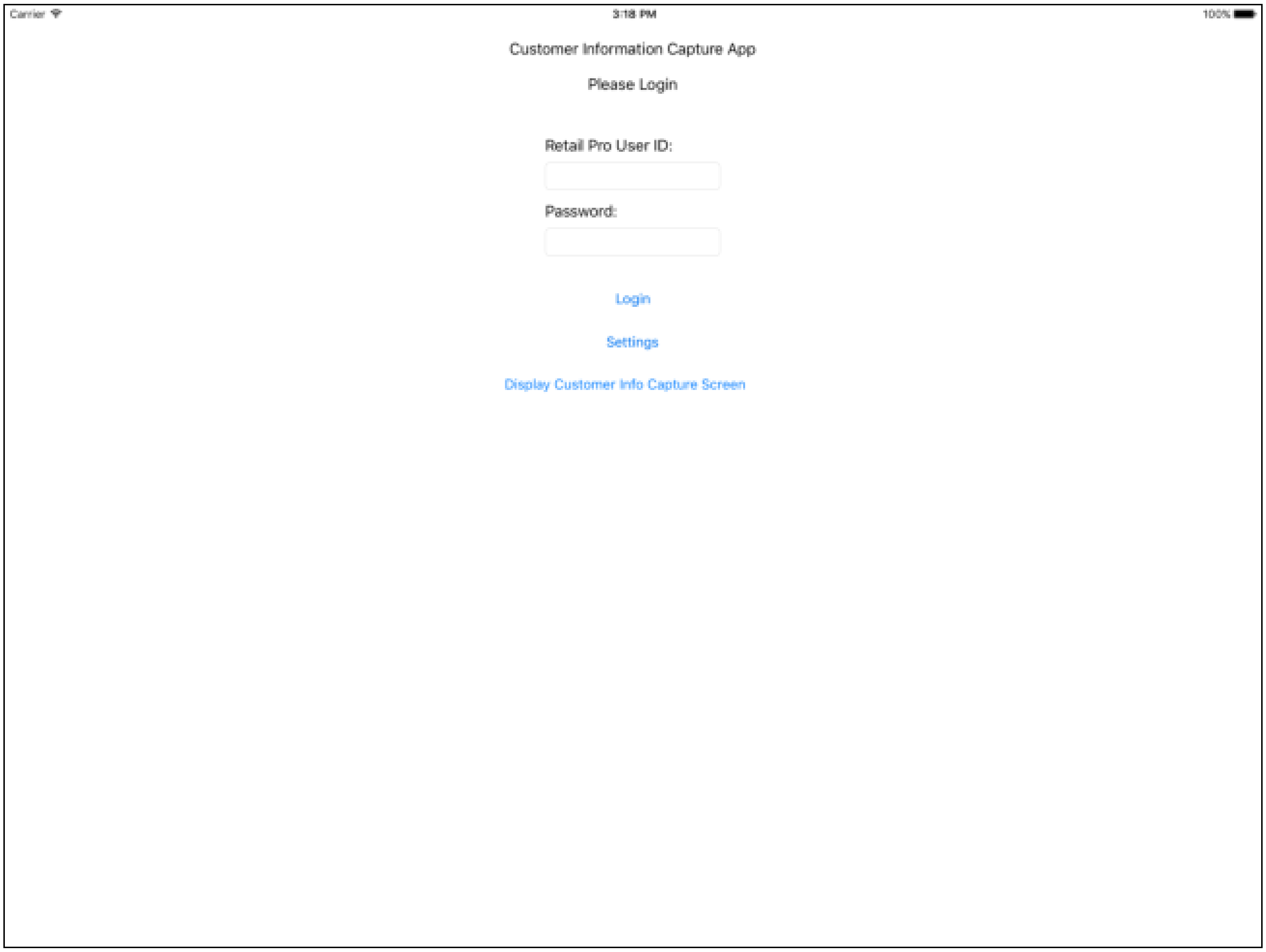
The Data Service Port should default to 49990. If the port was changed at the data service, be sure to enter the new port in the Settings screen.

Change the timeout value if desired.

The Test button can be used to test the connection to the data service. The service must be running to get a successful test.

Login Screen

If the settings have been entered, the Login Screen is displayed:



Enter your Retail Pro Username and Password.

Touch the Login button. If login is successful, the Customer Information Capture screen is displayed.

An error that is received from login (other than Invalid Username/Password) usually means the data service is not running or cannot be reached.

The Settings button can be used to display the Settings screen. Do this if there has been a change to the host or port or you want to change the timeout.

If a successful login has been done in the current day, the Display Customer Info Capture Screen button is active. Use this button to display the Customer Info Capture Screen without logging in.

IMPORTANT: If the iPad Setup in Retail Pro is changed, a login must be done to bring the new settings into the iPad App.

Customer Information Capture Screen

The layout of the screen will vary depending on the fields that have been selected in Setup.

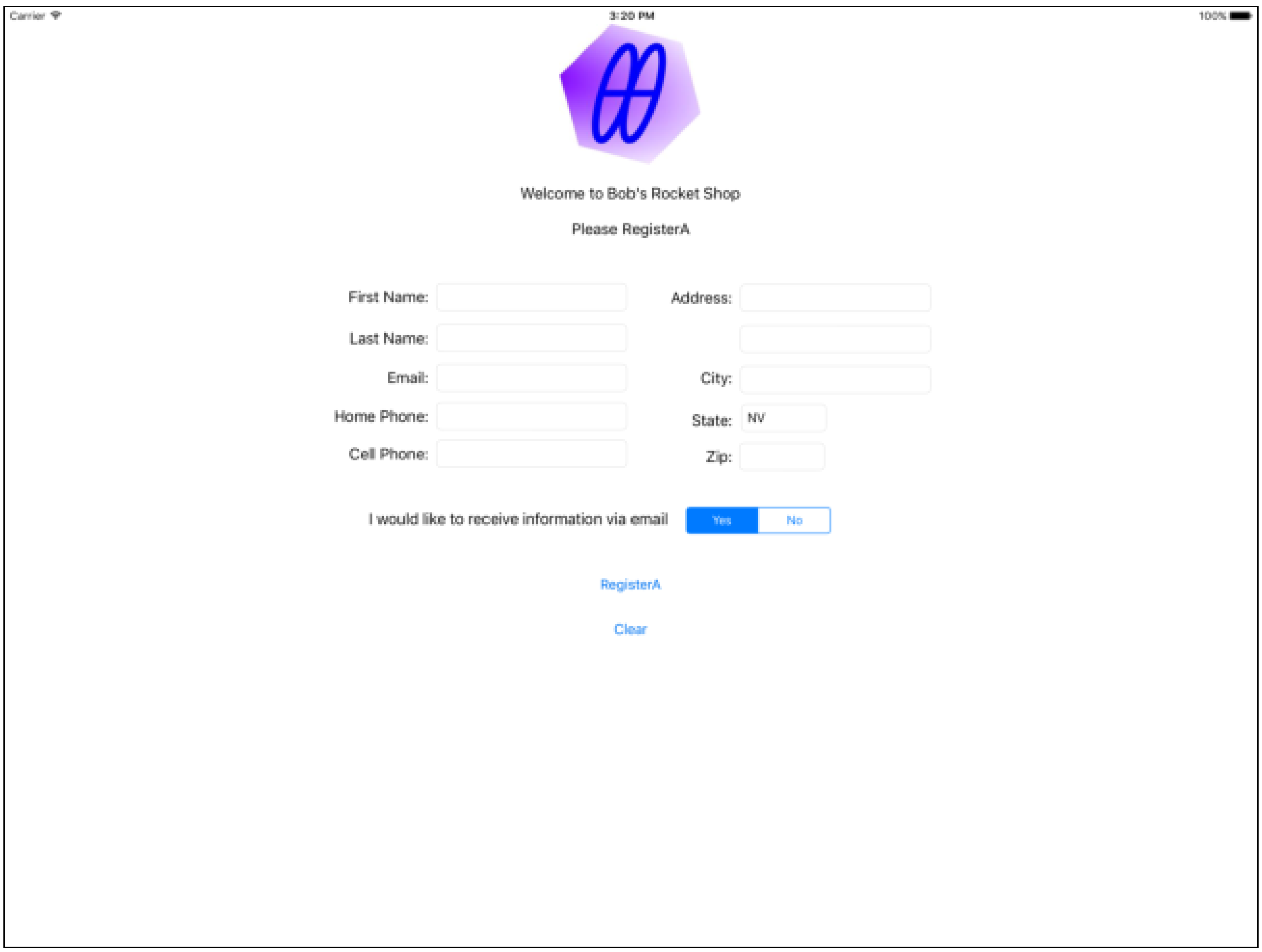
The customer interacts with this screen and no other screen.

The customer enters the information and clicks or touches the Register button.

A "Thank You!" message is displayed and the screen clears itself and is ready for the next customer.

No employee intervention is required.

Here is a sample screen where all fields are being used:



To exit this screen and return to the Login screen, enter 999999 (six nines) in the First Name box and click or touch Register.

Customer Capture App (Windows)

Preparing A Logo File

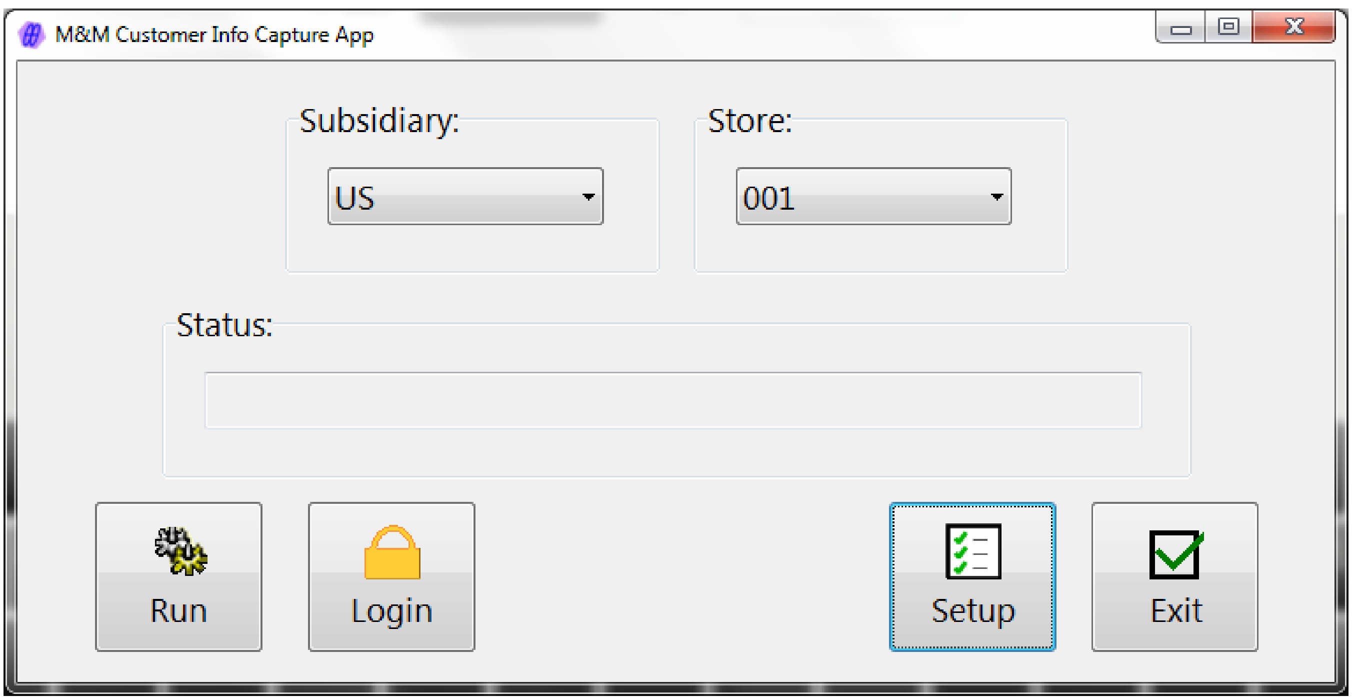
The Customer Capture App will display a logo on the Customer Capture screen. Use of the logo is optional. The logo must be a JPEG format file with .jpg extension. The height and width should not exceed 200 pixels.

If a logo is used, it must be copied to the system or tablet running the App.

Running The Windows App

Start the app. If Set Up has not been done, the Setup screen is displayed. Otherwise, the Login screen is displayed.

Main Screen



With successful Login and Setup, the Main screen is displayed.

Select the Subsidiary and Store from the drop down.

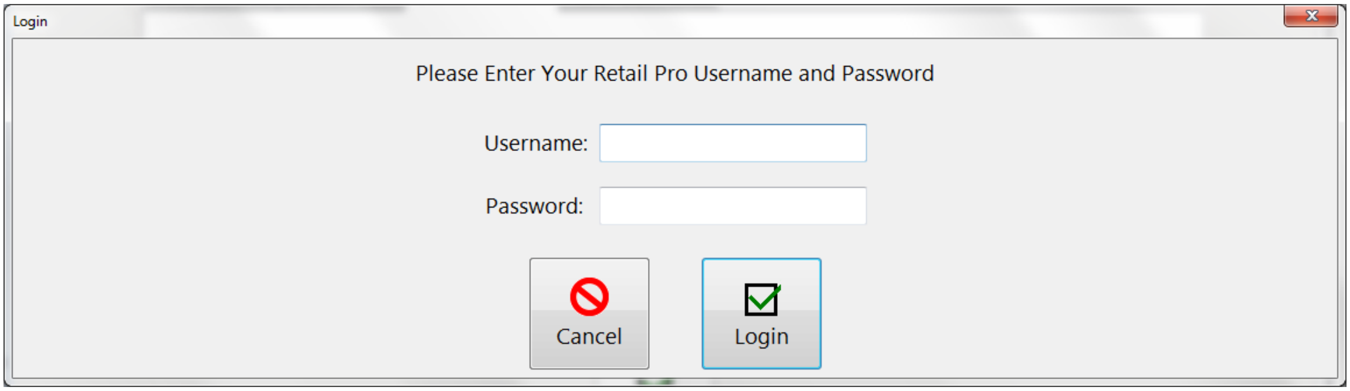
The Login button can be used to display the Login screen. This might be necessary in the case where the data service host had to be changed in Setup and login could not be done.

Click or touch Setup to display the Setup screen.

Click or touch Run to display the Customer Information Capture Screen.

Login

The Login screen is displayed when the App is started and Setup has been done.



Enter your Retail Pro Username and Password.

Click or touch the Login button. If login is successful, the main screen is displayed.

The data service must be available for successful login.

An error that is received from login (other than Invalid Username/Password) usually means the data service is not running or cannot be reached.

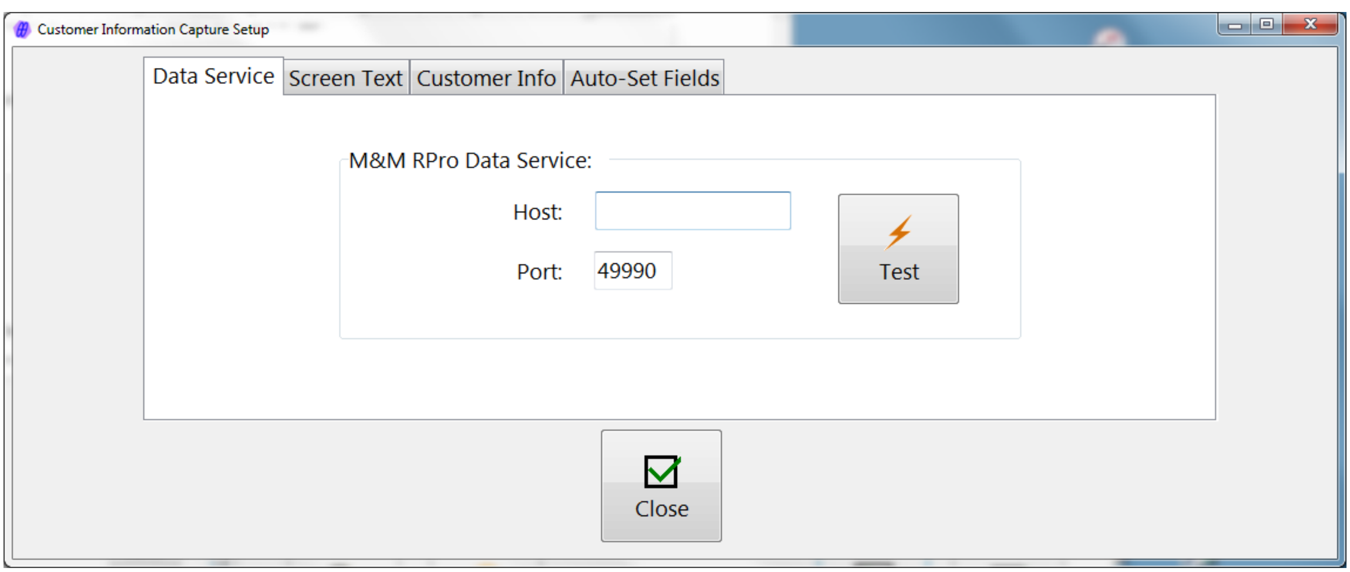
Note: On tablets, the on-screen keyboard is displayed.

Setup

The Setup screen has 4 tabs: Data Service, Screen Text, Customer Info and Auto-Set Fields.

Note: On tablets, the on-screen keyboard is displayed.

Data Service

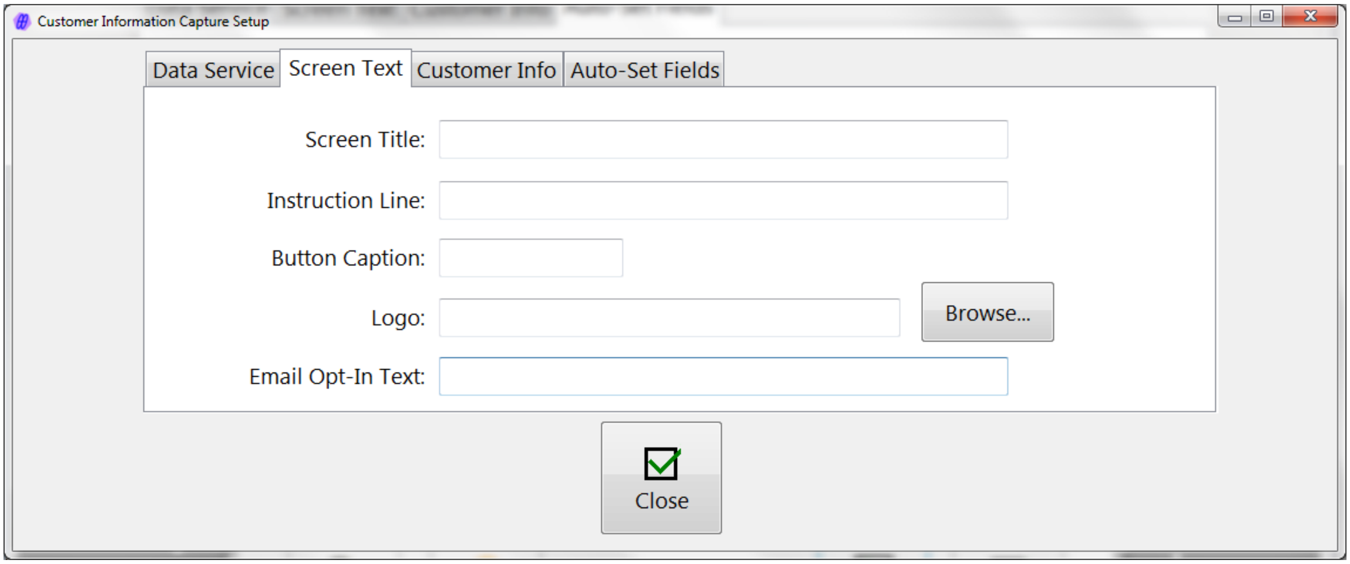


Enter the IP address of the system running the data service.

If a different port was used than the default, enter the port number.

Use the Test button to test the connection.

Screen Text



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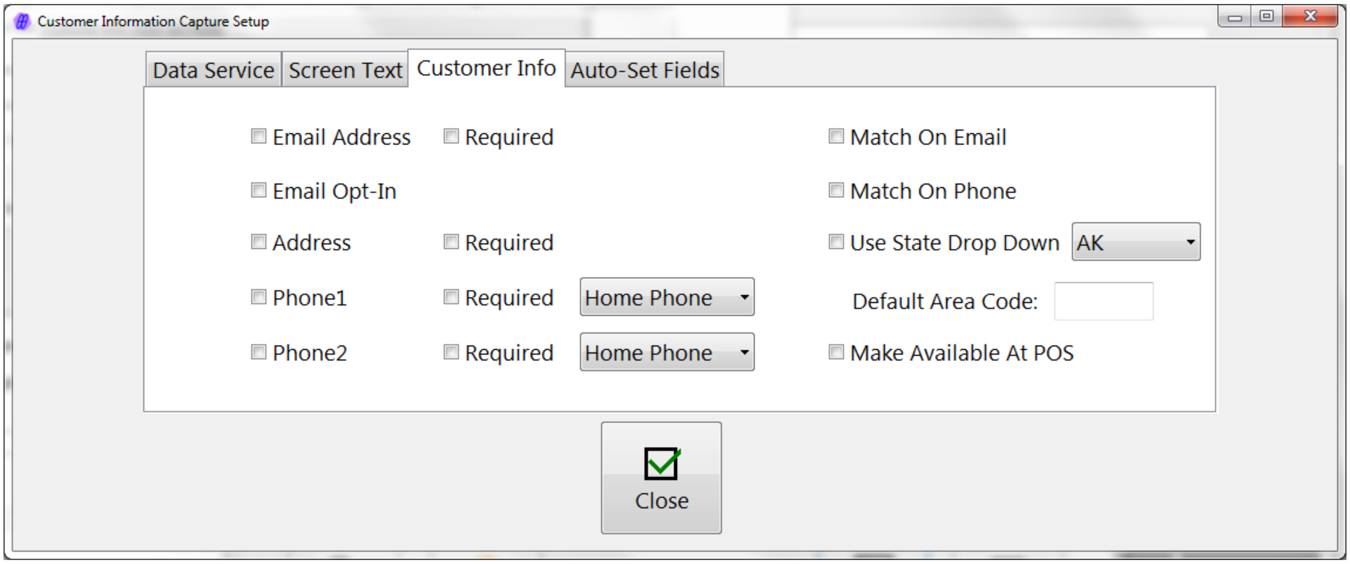
Logo – If a logo file will be used, enter or browse for the logo file. The logo file must be a jpg file. The logo file must be on the system running the app.

Email Opt-In Text – The app can capture email addresses and opt-in permission (Yes/No). If opt-in will be captured, this is the text of the opt-in permission line.

Customer Info



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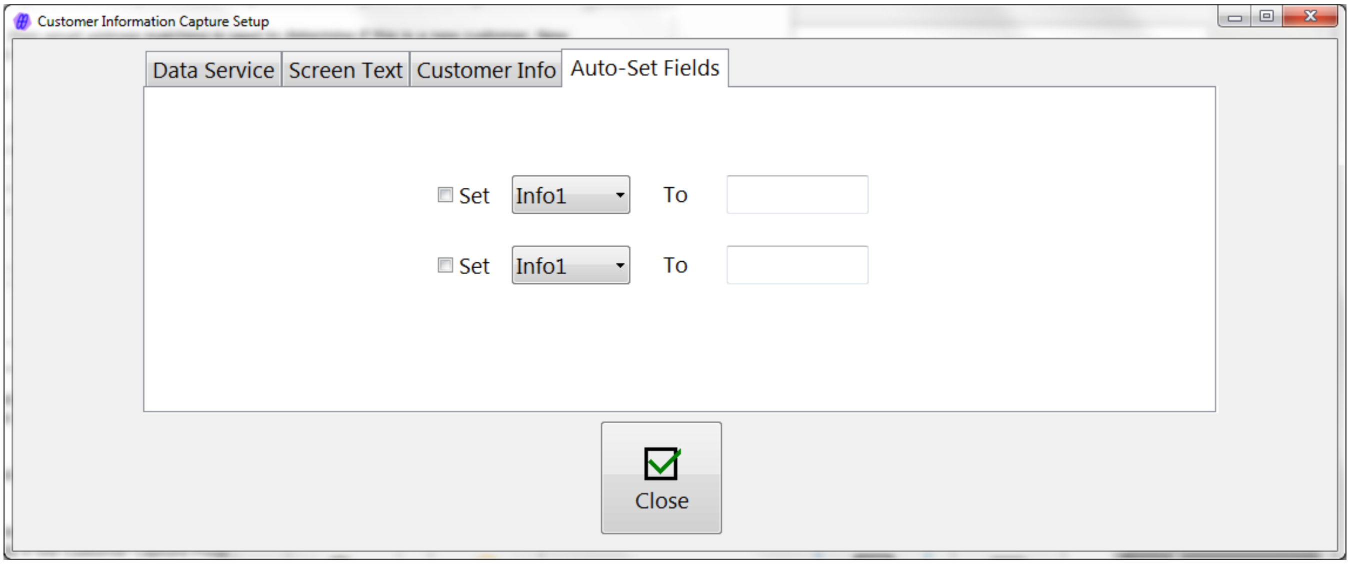

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Customer Information Capture Screen

The Customer Information Capture screen fills the entire display. The layout of the screen will vary depending on the fields that have been selected in Setup.

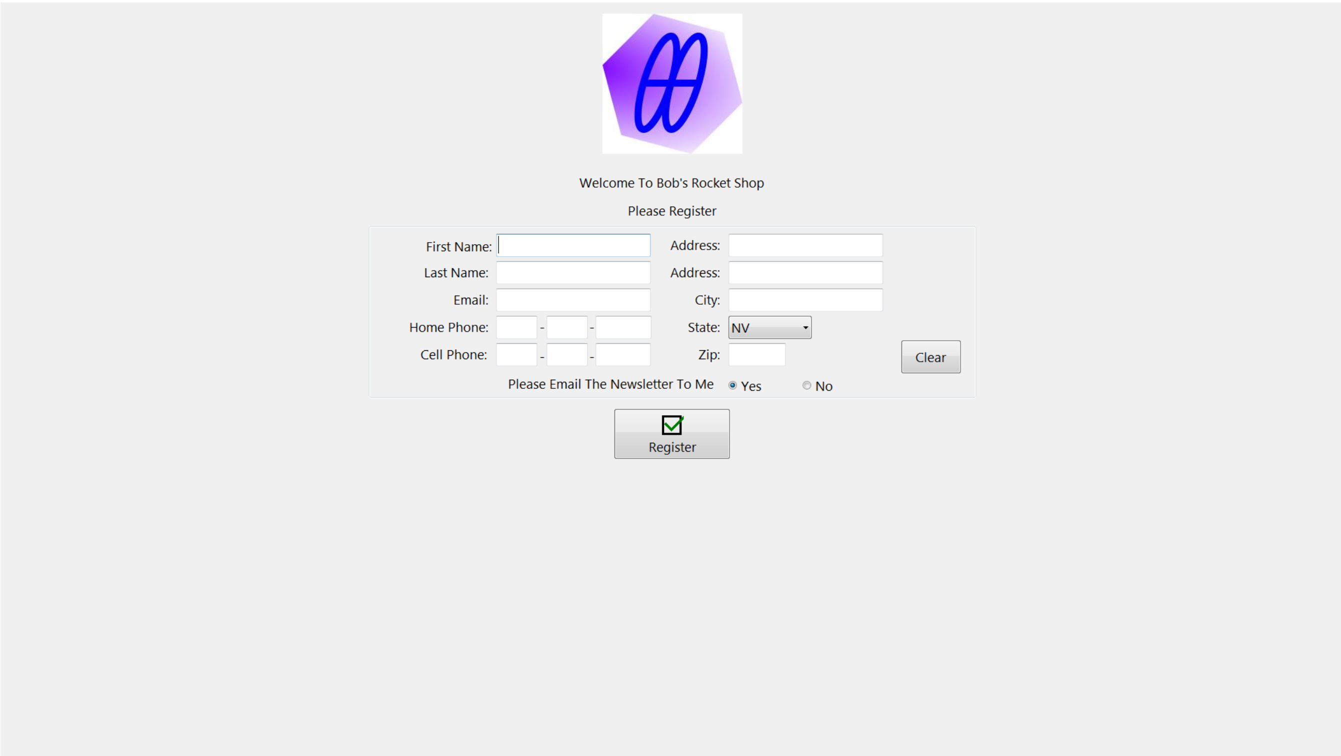
On a tablet, the logo is displayed to the left and the on-screen keyboard is displayed.

The customer interacts with this screen and no other screen.

The customer enters the information and clicks or touches the Register button.

A "Thank You!" message is displayed and the screen clears itself and is ready for the next customer.

No employee intervention is required.



To exit this screen and return to the Main screen, enter 999999 (six nines) in the First Name box and click or touch Register.

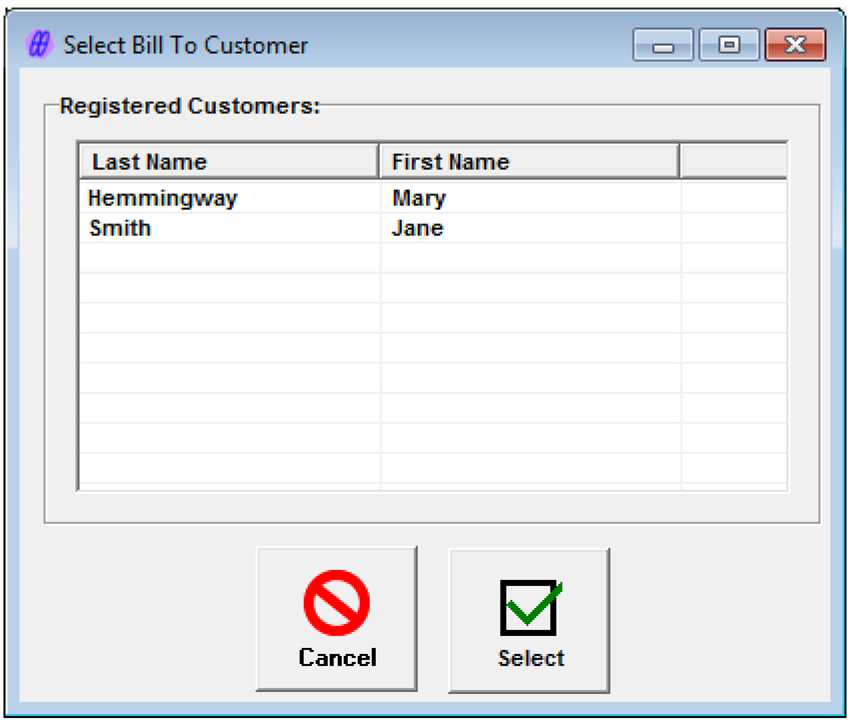
Customer Capture Plugin

The Customer Capture Plugin enables the cashier to find a customer who has registered and add the customer to the current receipt.

Note: The "Make Available At POS" option must be checked in the Customer Information Capture App for the plugin to work.

From a current receipt, click the Registered button on the side menu:

The Select Bill To Customer screen is displayed:



All customers that registered using the Customer Info Capture App that day are listed.

Select a customer from the list and click Select.

The customer is added to the receipt as the Bill To Customer.