

**Installation and User Manual  
M&M Customer Information Kiosk – v1.x  
For Retail Pro® Prism 1.14, 2.x  
and  
Browser (On A Device)**

## Table Of Contents

<b>Overview.....</b>	<b>3</b>
Program Files Directory .....	3
Licensing .....	3
Customer Information Kiosk.....	3
Phone Number/Email.....	3
Address.....	4
Birthday.....	4
Opt-Ins.....	4
<b>Installation .....</b>	<b>5</b>
Important – Services .....	5
Installation Procedure.....	5
Install Location.....	6
Additional Tasks .....	7
Install.....	8
Custom Transaction Screens .....	8
<b>Prism Actions.....</b>	<b>9</b>
Clear Cached Web Pages .....	9
Prism Customization Setup.....	9
Customization .....	9
HAL Setting .....	10
<b>Services.....</b>	<b>12</b>
<b>CK Customer Information Browser Licensing and Configuration.....</b>	<b>13</b>
Adding a Device .....	14
Updating a Device .....	14
Removing a Device.....	15
The Test Button .....	15
Setup .....	16
Customer Information Tab .....	16
Identification Screen Tab .....	17
Capture/Verify Screen Tab .....	18
<b>Browser Operation .....</b>	<b>20</b>
Starting the Browser.....	20
<b>Prism Operation.....</b>	<b>21</b>
CK Info Button .....	21
Customer Identification .....	22
Entering and Editing Customer Information.....	23
Quick Customer Screen.....	23
In The Browser .....	23
Verifying Customer Information .....	24
<b>Appendix A – Genius Information .....</b>	<b>26</b>
<b>Appendix B – Technical Information.....</b>	<b>26</b>
MMPrismSvc.exe .....	26
MMLDS.exe.....	26
MMCKSvc.exe .....	26
C:\Program Files (x86)\MMEnterprise\PrismCustInfoW Directory .....	27

## **Overview**

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The browser version of the M&M Customer Information Kiosk for Prism uses a device running a browser to:

Identify customers by phone number or email.

Have customers enter or edit their information on the browser.

Have customers verify their information on the browser.

## **Program Files Directory**

This manual refers to the C:\Program Files (x86) directory which is usually on the C drive. However, the Program File directory can be on drives other than C and in this case, the correct drive should be used when reading the manual.

## **Licensing**

Licensing is done by Prism User ID and maximum number of devices that will use the add-on.

License files are not required. Licensing is verified over the Internet.

## **Customer Information Kiosk**

The CK Customer Information can be used to locate a customer in Prism based on phone number or email, add new customers to Prism and update information for existing customers.

The Quick Customer Information screen (part of the add-on) is used to perform these functions. What is displayed on this screen and the browser device is entered in the CK Customer Information Setup utility.

Information that can be captured by the add-on: Name, Phone Number, Email, Address, Birthday and Opt-Ins.

Customer information can also be displayed on the browser device so the customer can confirm that it is correct or incorrect.

### **Customer Name**

The customer's name can be captured on the Quick Customer screen or in the browser on the customer facing device.

### **Phone Number/Email**

In the Customer Information Kiosk, phone number or email can be the primary identifier for a customer.

A phone number or email address can be entered by the customer in the browser or by the cashier in the Quick Customer Information screen.

Phone information captured includes phone type and phone opt-in.

Email information includes email type and opt-in.

## **Address**

Address can be used in the Customer Information Kiosk. If a customer is found for a phone number, the address can be displayed and edited in the Quick Customer Information screen.

For new customers, the address can be entered in the Quick Customer Information screen or by the customer in the browser.

Address information includes address type and mail opt-in.

## **Birthday**

The Customer Information Kiosk can also capture the customer's birthday with or without a year. Birthday can be entered by the customer in the browser.

## **Opt-Ins**

Opt-in choices (Phone, Email and Mail) can also be entered in the browser by the customer.

## **Installation**

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All required software is provided in the CKCustInfoWPrism-vX.X zip where X.X is the version number. The zip file contains:

CKCustInfoWPrismInstaller-vx.x.exe – CK Tip Installer for Prism  
CK Cust Info Prism Browser Manual.pdf – This manual.

### **Important – Services**

The MMLDS.exe and MMCKSvc.exe are the two core services that drive the Customer Information Browser add-on. These two services **MUST** be installed on the same system and the device running the browser **MUST** have network access to that system.

In addition, that system must have the Prism client installed (C:\ProgramData\RetailPro\Server and all subdirectories) including the Prism Proxy.

The device running the browser will only be available to a Prism client on that system or connected to that system. Think of the device running the browser as a device tied to a single workstation like a Genius device.

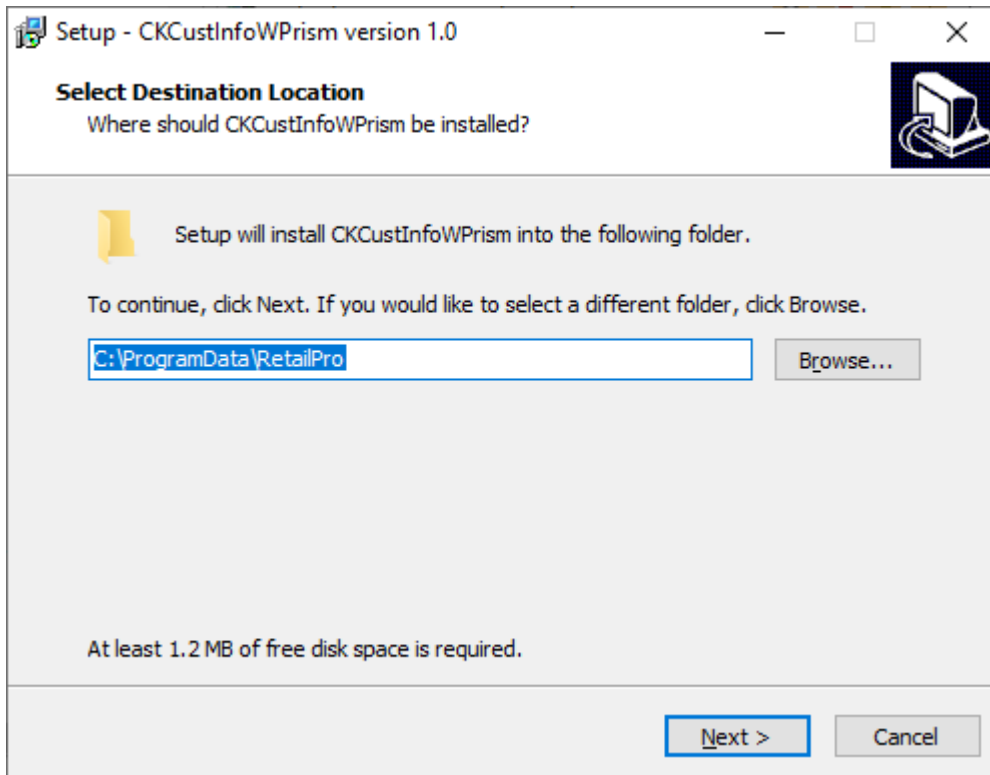
### **Installation Procedure**

Installation is done at every system with a Prism Proxy (where the add-on will be used) and the corresponding Prism server systems.

Notes: Configuration is done at the “store” level. Therefore, the Configuration utility is only installed on “store server” systems.

At each system, extract and run CKCustInfoWPrismInstaller-vx.x.exe from the zip with administrator privileges.

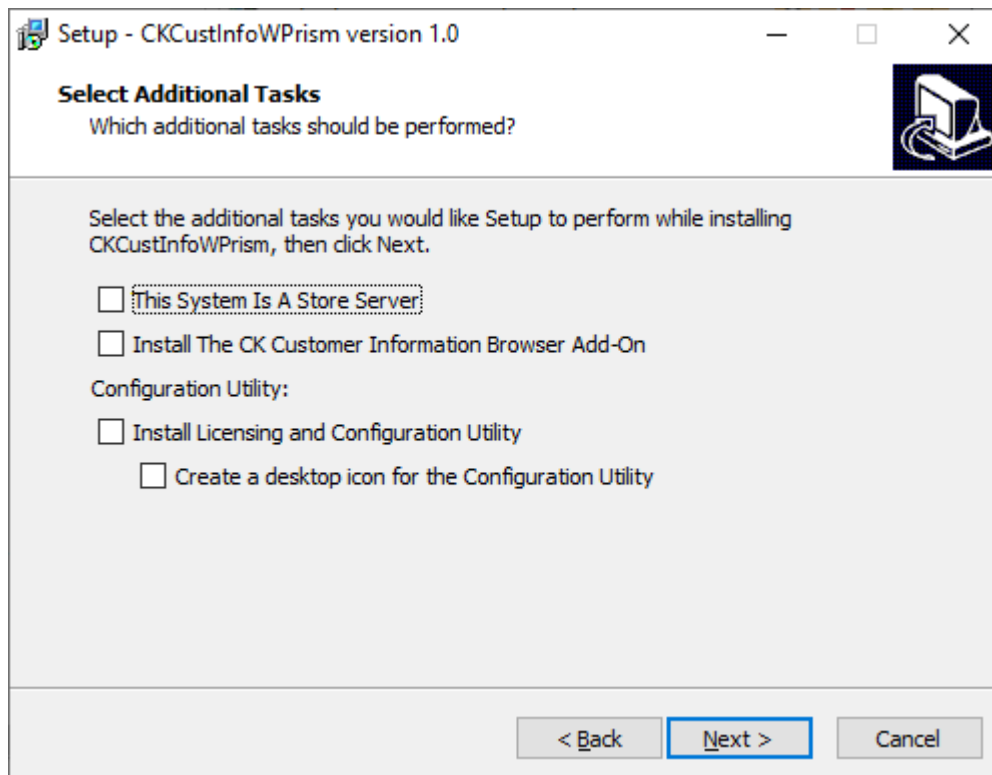
## Install Location



Normally, the installation destination will be the C:\Program Data\RetailPro folder. If the Prism Server has been installed in a different directory, enter or browse for that directory.

When the Destination Location is correct, click Next>.

## Additional Tasks



Check "This System Is A Store server" if the system is a store server.

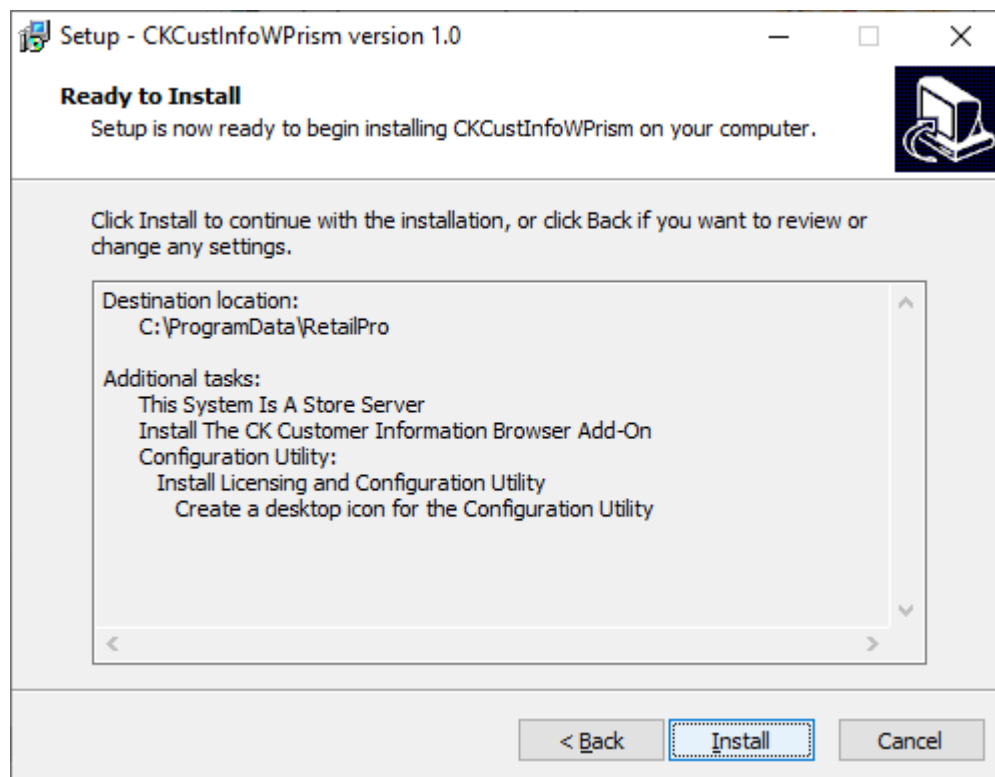
Check "Install The CK Customer Information Browser Add-On" to install the add-on including support for devices with browser. Checking this box installs the MMLDS service, the MMCKSvc and the full add-on for the Prism client. The Prism client must be installed on the system.

Check "Install Licensing and Configuration Utility" to install the Licensing and Configuration utility. This would normally be done on all store servers.

Check "Create a desktop icon..." to create a desktop icon for the Licensing and Configuration utility.

Click Next>

## Install



Click Install to complete the installation.

## Custom Transaction Screens

This add-on uses custom transaction screens to add the "CK Info" button to the screen.

If another Prism add-on is in use that also has a custom transaction screen, it is possible there will be a conflict. In this case, contact M&M Enterprises for a resolution.

## Prism Actions

### Clear Cached Web Pages

On each workstation that will use the CK Customer Information add-on, open the browser used for Prism and clear the cached web pages.

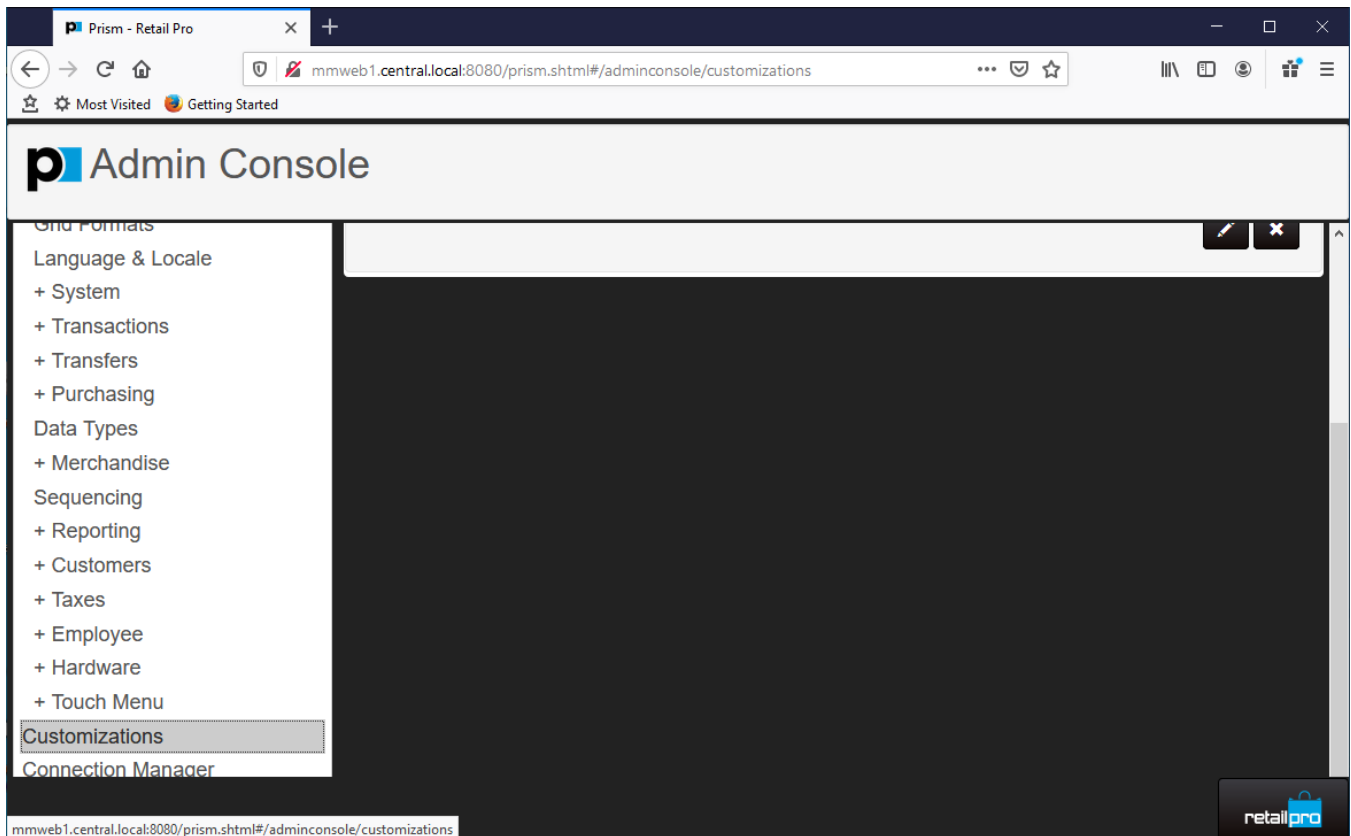
### Prism Customization Setup

After installing the CK Customer Information add-on, each workstation must be setup for the customization.

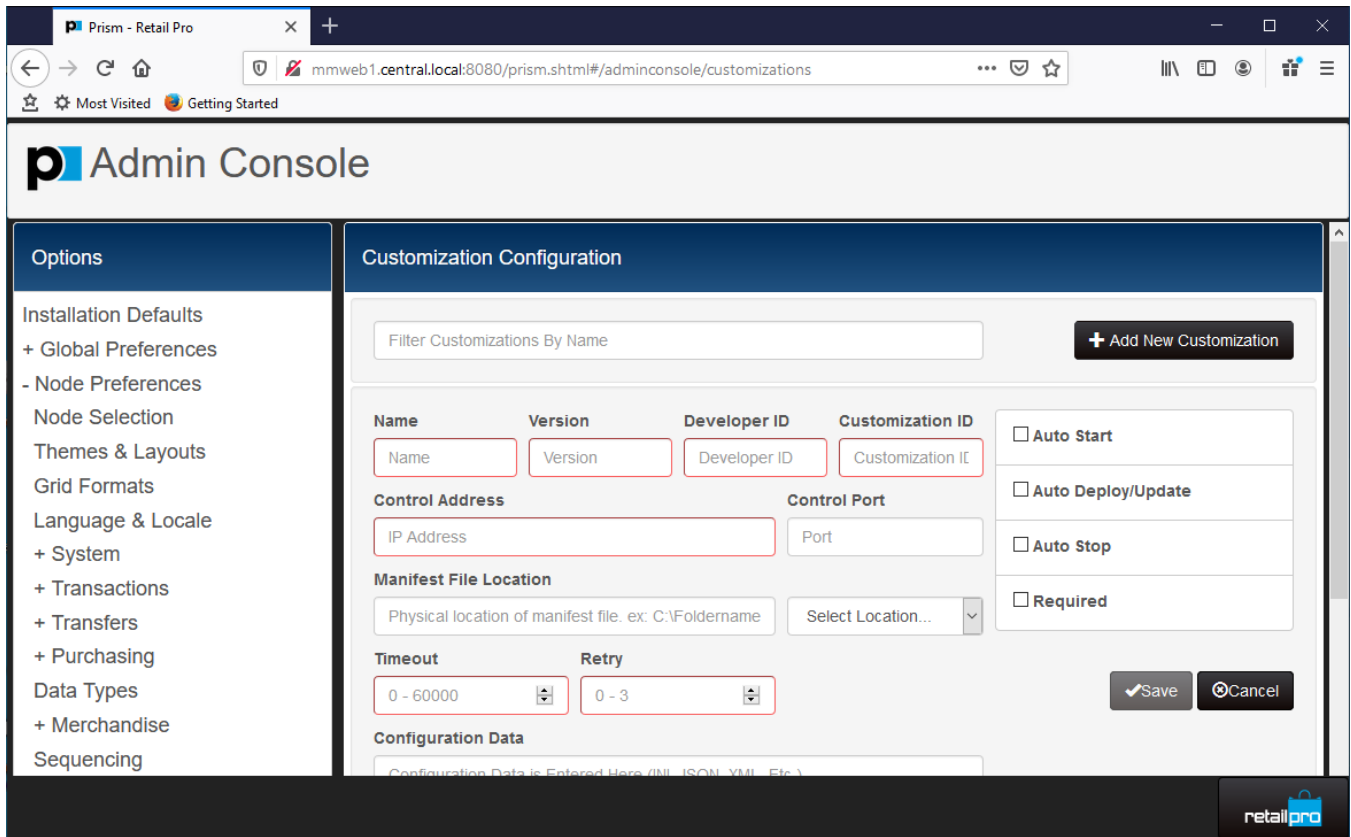
Start Prism on the workstation and navigate to the Administration Console.

### Customization

Click Customizations near the bottom of the left-hand panel:



In the right-hand panel, click Add Customization:



Fill in the following information:

Name LDS

Version 1.0.0

Developer ID 088

Customization ID 010 – NOTE: When installing for more than one workstation, increment the CustomizationID.

Control Address – IP Address of the workstation.

Control Port 28800

Timeout 120000

Retry 1

Check Auto Start

Click Save

## HAL Setting

Under Node Preferences, set the context to the workstation.

Click the Edit icon for the Workstation. Edit Workstation is displayed:

Prism - Retail Pro

mmweb1.central.local:8080/prism.shtml#/adminconsole/preferences/wo

## Edit Workstation

General Sequencing HAL Settings Printer Types

**Workstation Identification**

Number	Name
<input type="text"/>	scheduler_sbs1

Type

Kiosk  Active

**Override Global Settings**

Subsidiary: 001

Store: 0 - Default0

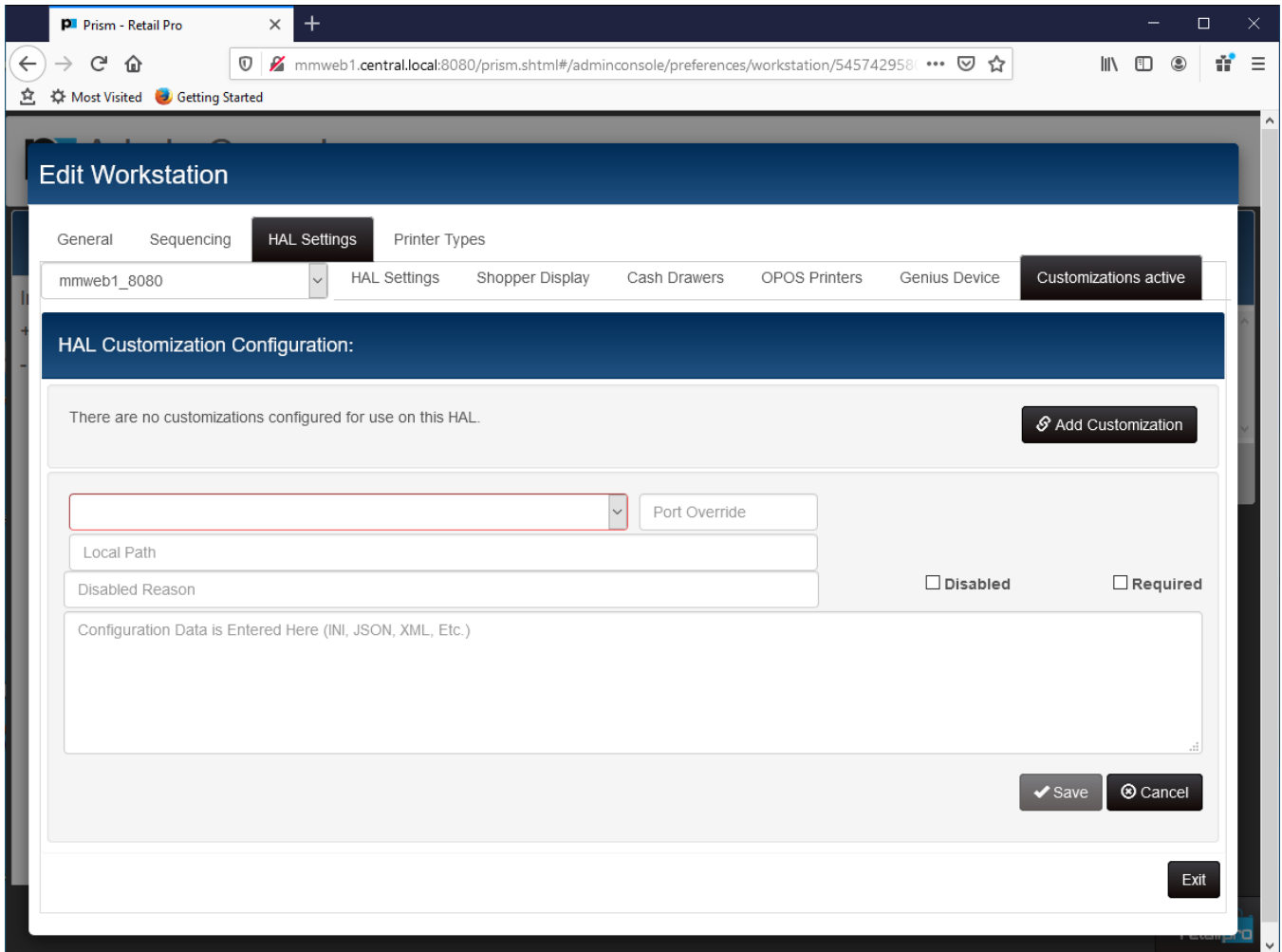
Price Level: None

Tax Area 1: None

Tax Area 2: None

Save & Exit Exit

Select HAL Settings, select the Workstation from the drop down and then click Customizations and then Add Customization:



Select the LDS customization from the drop down. Select the entry with the IP address of the workstation. The Port will be automatically set.

Set the Local Path to C:\Program Files (x86)\MMEEnterprise\LDS\MMLDS.exe.

Click Save.

Customization setup is complete.

## Services

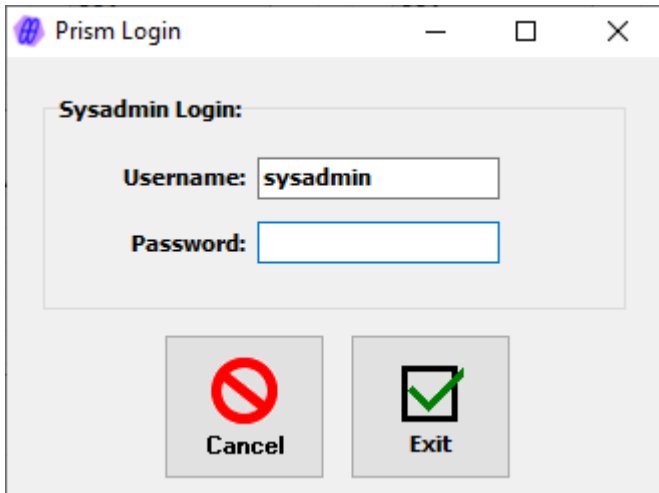
Verify that the MMLDS and MMCKSvc services are running on the system.

The MMCKSvc uses port 48840. This port must be open so that devices can communicate with the service.

## CK Customer Information Browser Licensing and Configuration

Run the MMCustInfoWLicConfig.exe utility (PrismCustInfoWConfig shortcut or from CK Cust Info W>Configuration on the Start Menu).

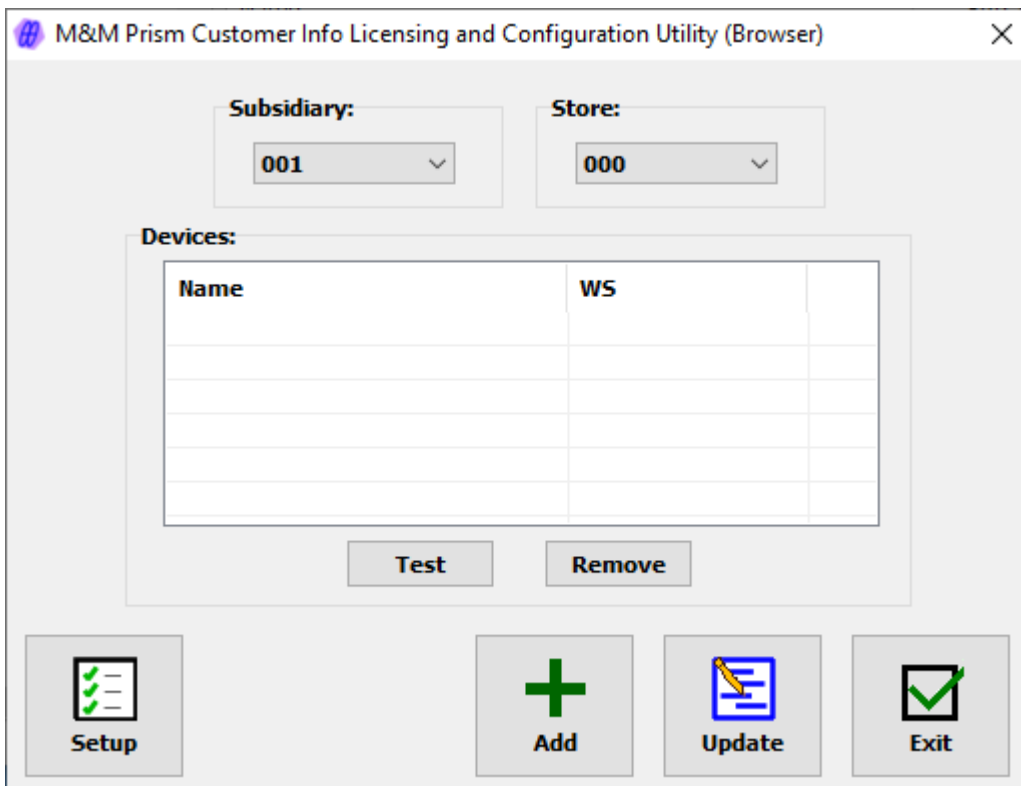
For Prism versions below v2.3, the Prism Login screen is displayed:



Enter the username and password for the sysadmin user. This only has to be done once.

For Prism versions 2.3 and above, a prompt for the Prism\_Custom user password may be displayed.

The utility main screen will be displayed:



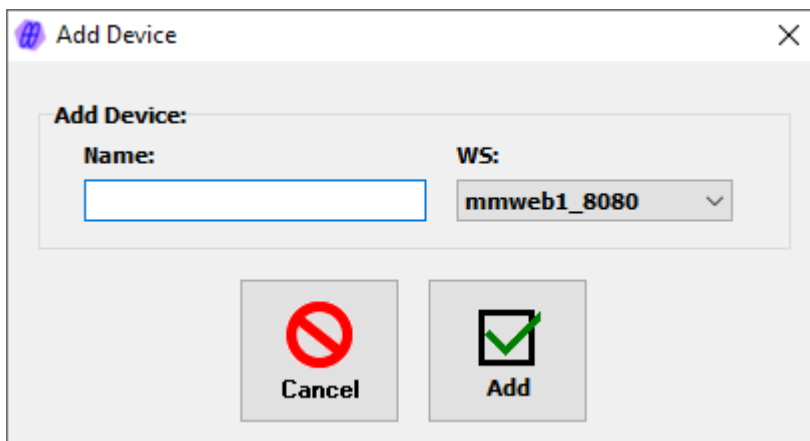
This screen is used to select a device for Setup and to add, update or remove devices.

Select the Subsidiary and Store.

If any devices are already assigned to the Subsidiary/Store, they will be displayed in the grid.

## Adding a Device

To add a device, click the Add button. The Add Device screen is displayed:



Enter the name that will be used to identify the browser associated with the workstation. The name can be anything up to 30 characters. This name will be used when setting up the browser on the device.

MAKE A NOTE OF THE NAME. THE NAME WILL BE ENTERED IN THE BROWSER EXACTLY AS ENTERED HERE.

Select a workstation from the drop down. All the workstations assigned to the store should be available.

Click the Add button.

Cancel can be used to exit without adding the device.

There are several messages that can be displayed when Add is clicked:

“Device name is already assigned.” – The name is already assigned to a workstation.

“A device with this name is assigned to workstation [name].” – The name is assigned to another workstation.

“The total number of licensed devices has been allocated.” – Adding this device would exceed the maximum number of devices in the end user’s license.

## Updating a Device

To update a device’s Workstation, select it in the list and click Update. The Update Device screen is displayed:

Update Device

Updating:

Name: TestPad

WS: mmweb1\_8080

Update To:

WS: mmweb1\_8080

Cancel Update

Select the new workstation from the drop down and click Update.

## Removing a Device

To remove a device from the list, select it and click the Remove button.

When a device is removed, the license allocation is released.

## The Test Button

To test the device with the plugin, select the device and click Test.

THE BROWSER ON THE DEVICE MUST BE RUNNING IN ORDER FOR THE TEST TO BE SUCCESSFUL. THIS MEANS COMPLETING SETUP FOR THE DEVICE AND INITIALIZING THE BROWSER ON THE DEVICE.

A test message will be displayed in the browser on the device. Touch the OK button.

## Setup

Select a device or workstation from the list and click the Setup button. The CK Customer Information Setup screen is displayed.

### Customer Information Tab

The screenshot shows a window titled "CK Customer Information Setup For Browser" with a close button in the top right corner. The window content is titled "Configuring TestPad Assigned To WS mmweb1\_8080". At the top, there are three tabs: "Customer Information" (selected), "Identification Screen", and "Capture/Verify Screen".

Under the "Customer Information" tab, there is a section titled "Quick Customer Screen Fields (Name and Phone Number Are Always Included):". This section contains the following controls:

- Address       Required      Default Address Type: Home (dropdown)
- Email       Required      Default Phone Type: Home (dropdown)
- Birthday    With Year   Field: UDF1 (dropdown)      Default Email Type: Home (dropdown)

Below this section is a "New Customer Share Type:" dropdown menu set to "Local".

At the bottom of the form area, there are two text input fields:

- "Browser Main Screen Title:"
- "Browser Logo File:" with a "Browse..." button to its right.

At the bottom center of the window, there is a "Done" button with a green checkmark icon.

This tab is used to configure the information that is captured by the add-on, what is required and the wording displayed on the browser.

The top section of the screen shows the fields that can be displayed on the Quick Customer screen. This is the screen that is displayed for the cashier. The Quick Customer screen always includes first name, last name, title, share type, phone number and phone number type. Phone number is always required. Phone opt-in is always shown on the screen.

Address and Required – If Address is checked then the address fields are available on the Quick Customer screen. Address fields are Address1, Address2, City, State, Zip and address type. If Required is checked then the customer's address is required. If address is checked, address opt-in is also on the screen.

Email and Required – If Email is checked then email and email type are available on the Quick Customer screen. If Required is checked then the customer's email is required. If email is checked, email opt-in is also on the screen.

Birthday – If Birthday is checked, then birthday month and day is shown on the screen. If With Year is checked then the year is included as a birthday field. Birthday cannot be a required field.

The Field drop down next to the birthday checkboxes is used to select the Customer UDF field that should be used for storing the birthday. UDF1 and UDF2 can only be used if Year is included in the birthdate.

Default Types – Use the drop down to select the default types for Address, Phone and Email. The default types are used when adding a new address, phone or email for the customer.

New Customer Share Type – Share type to use for new customers.

Browser Main Screen Title – When the browser is not interacting with the customer, a main screen is displayed with a title and optional logo. Enter the title for the screen in this box. Note that this is what the customer will see when they first look at the browser.

Browser Logo File – To display a logo on the browser, enter or browse for the logo file. The file must be in jpeg or png format.

### Identification Screen Tab

CK Customer Information Setup For Browser

Configuring TestPad Assigned To WS mmweb1\_8080

Customer Information Identification Screen Capture/Verify Screen

Prompt For Identification When The Quick Customer Screen Is Opened

Use Phone Number

Use Email Address

Identify Screen Title:

Accept Caption:

Cancel Caption:

Done

The Identification Screen tab is used to configure the browser screen for customer identification.

Prompt For Identification When The Quick Customer Screen Is Opened – If checked, the customer identification screen is displayed on the browser when the Quick Customer screen is displayed. If not checked, the cashier can cause the screen to be displayed from the Quick Customer screen.

Use Phone Number – Use phone number on the identification screen.

Use Email Address – Use email address on the identification screen.

Note that both of these options can be checked.

Identification Screen Title – Text that is displayed at the top of the identification screen. This should be something like "Please Enter Your Phone Number".

Accept Caption – Caption for the button on the browser screen indicating that data entry is complete.

Cancel Caption – Caption for the button on the browser screen indicating that information entry should be canceled.

### Capture/Verify Screen Tab

CK Customer Information Setup For Browser

Configuring TestPad Assigned To WS mmweb1\_8080

Customer Information Identification Screen **Capture/Verify Screen**

**Included Information:**

Phone Number  Required

Email  Required

Address  Required

Birthday  Required

Phone Opt-In

Email Opt-In

Mail Opt-In

**Screen Text:**

Capture Screen Title:

Accept Caption:  Cancel Caption:

Verification Screen Title:

Correct Caption:  Incorrect Caption:

Email Opt-In Text:

Phone Opt-In Text:

Mail Opt-In Text:

Done

Entries on this tab configure the screens used for capturing and editing customer information and verifying customer information on the browser.

***Included Information***

If a field is checked in this section, it is displayed in the browser. If Required is checked, the customer must enter the information.

***Screen Text***

The entries in this section determine the text displayed in the browser:

Capture Screen Title – the title displayed at the top of the screen used to capture or edit customer information.

Accept Caption – The caption on the button used to accept the information.

Cancel Caption – The caption on the button used to cancel the operation.

Verification Screen Title – the title displayed at the top of the screen used to verify customer information.

Correct Caption – The caption on the button used to indicate the information is correct.

Incorrect Caption – The caption on the button used to indicate the information is incorrect.

Email Opt-In Text – Text for email opt-in.

Phone Opt-In Text – Text for phone opt-in.

Mail Opt-In Text – Text for mail opt-in.

## Browser Operation

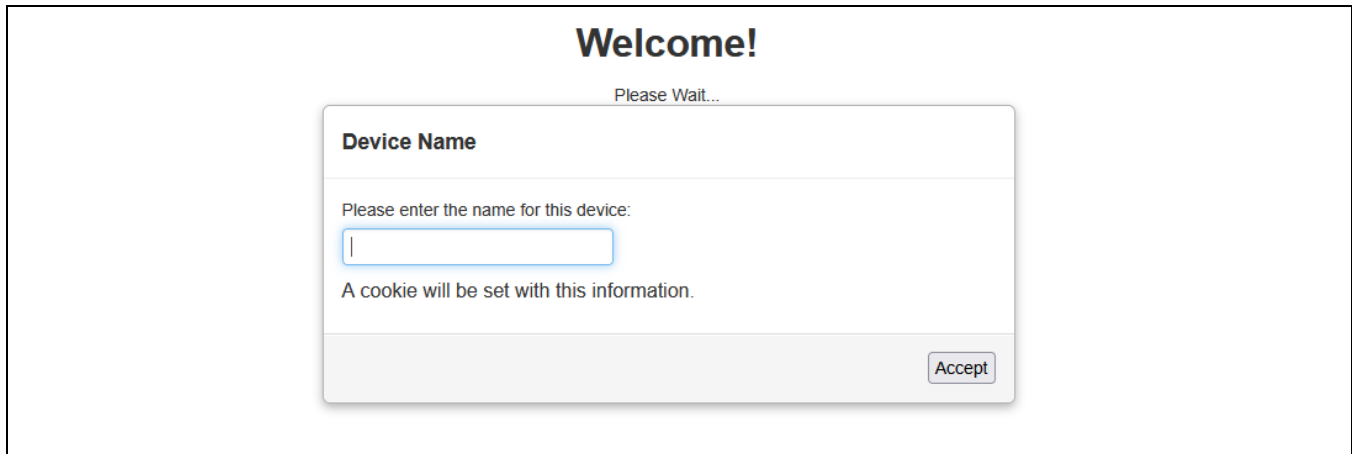
### Starting the Browser

The browser should be initialized and running before using the add-on at POS.

Open the browser and enter <http://PrismSystem/CIWStart.html>. (This page should be bookmarked.)

Where PrismSystem is the IP Address or computer name of the system running Prism.

The Welcome screen will be displayed with a form requesting the Device Name:



**Welcome!**

Please Wait...

**Device Name**

Please enter the name for this device:

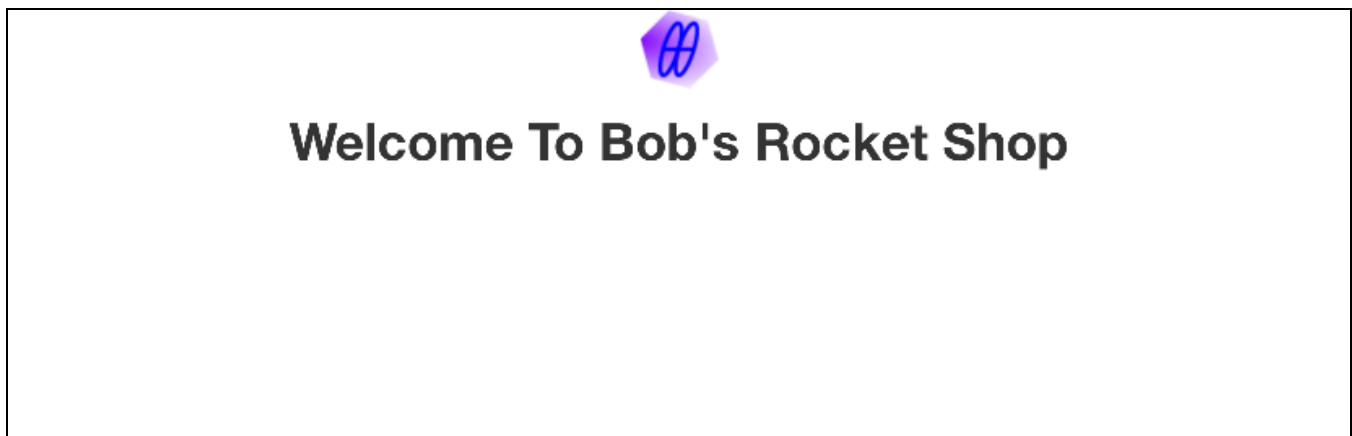
A cookie will be set with this information.

Accept

Enter the device name that was entered in the configuration utility. The name must be entered exactly. The device name will need to be re-entered periodically. (But not every time the CIWStart page is opened.)

Click the Accept button.

If MMCKSvc is running and the device name can be verified, there will be a pause and then the Customer Info idle screen will be displayed:



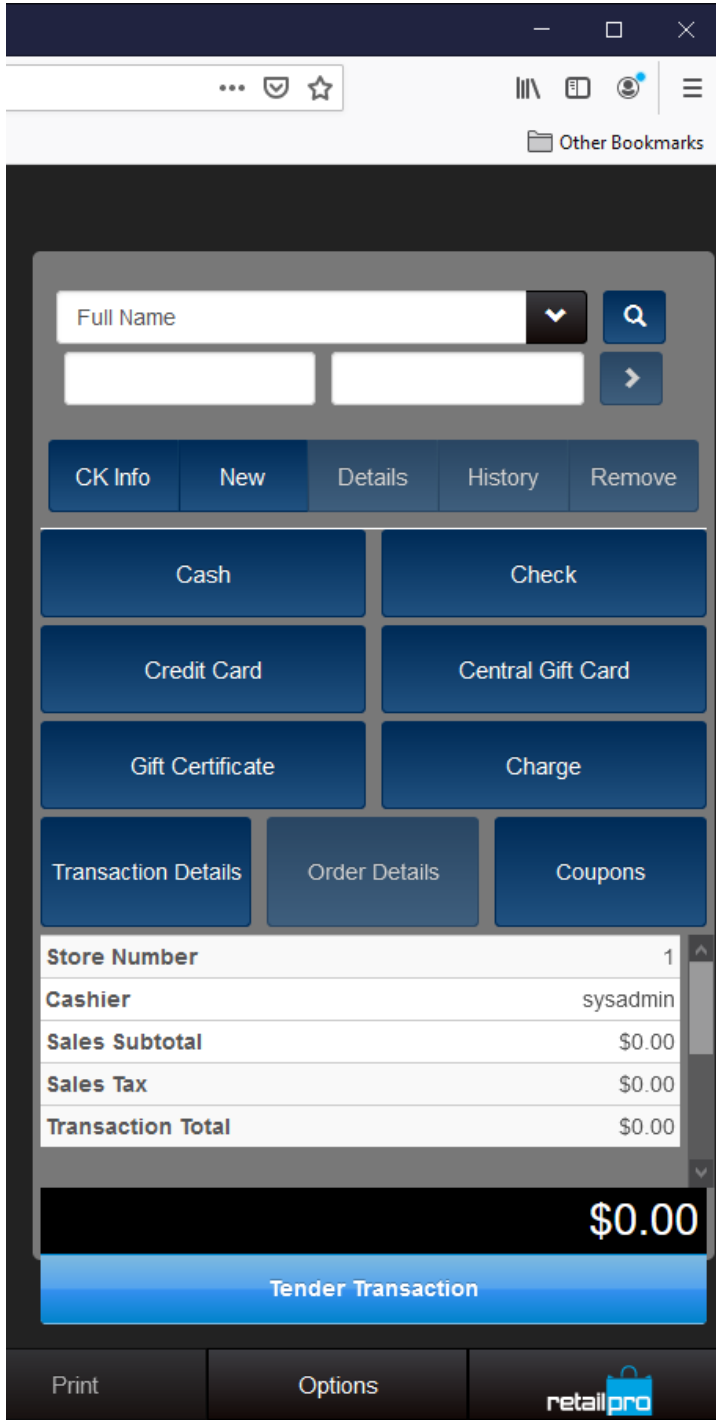
The idle screen will have the title (and logo, if entered) from Setup.

The idle screen is displayed until an action is requested from the Prism system.

## Prism Operation

### CK Info Button

All CK Customer Information functions are performed from the Quick Customer Information screen. This screen is displayed by clicking the CK Info button on the transaction screen. This button has been added to row of customer function buttons:



When CK Info is clicked, the CK Customer Information screen is displayed followed by the Quick Customer Info screen:

The screenshot shows the 'Quick Customer Info' screen with the following fields and controls:

- Phone: Input field, Phone Type: Mobile (dropdown), Search By Phone button.
- Email: Input field, Email Type: Home (dropdown), Search By Email button.
- First Name: Input field, Last Name: Input field, Title: (dropdown), Share: Local (dropdown).
- Address 1: Input field, Address Type: Home (dropdown).
- Address 2: Input field.
- City: Input field, State: Input field, Zip: Input field.
- Birthday: Month (dropdown), Day: Input field, Year: Input field.
- Optins:  Phone Contact Allowed,  Mail Contact Allowed,  Email Contact Allowed.
- Buttons: Clear, Identify On Device, Display On Device, Verify On Device, Cancel, Close.

**IMPORTANT:** If "Prompt For Identification When The Quick Customer Screen Is Opened" is checked in the configuration utility, then the Identification screen is displayed on the browser and the "Waiting for customer" screen is displayed in Prism. (See Identify On Device below).

In this example, all fields have been selected in the configuration utility.

If a customer is on the transaction, the customer's information is displayed on the Quick Customer Info screen. Otherwise, all fields are blank.

## Customer Identification

In customer identification, the add-on attempts to find an existing customer by phone number or email address. If a customer is found, the information is displayed on the Quick Customer Info screen.

There are three ways to identify the customer:

**Search By Phone** – The cashier enters a phone number on the Quick Customer Info screen and clicks Search By Phone. If the customer is located in Prism, the customer's information is displayed on the screen. Search By Phone is always included.

**Search By Email** – Search by Email is only displayed if Email Address was selected as a Quick Customer Info field in setup. The cashier enters an email address and clicks Search By Email. If the customer is located in Prism, the customer's information is displayed on the screen.

**Identify On Device** – Uses the browser on the assigned device to capture a phone number or email address from the customer. When Identify On Device is clicked, the Identification screen is displayed in the browser. The identification screen is displayed in the browser:



Welcome To Bob's Rocket Shop

Please Enter Your Phone Number Or Email

Phone Number:

Email:

Skip Accept

Whether Phone Number and/or Email are displayed is determined by the entries in Setup.

The customer will enter their phone or email and select the Accept button. A "Thank You" message is displayed and the browser returns to the idle screen. If the customer is found, the customer information is displayed on the Quick Customer screen.

The customer can also select the Skip button. In this case, the identification screen is closed. On the Prism side, the cashier is informed that the customer did not enter any information.

## Entering and Editing Customer Information

There are several ways of entering and editing customer information.

### Quick Customer Screen

All information can be entered or edited on the Quick Customer screen by the cashier.

### In The Browser

When the "Display On Device" button is clicked on the Quick Customer screen, any information on the Quick Customer screen is also displayed in the browser in the Customer Information screen:

**Welcome To Bob's Rocket Shop**

**Please Enter Your Information**

First Name:  Last Name:

Address:

City:  State:  Zip:

Phone:

Email:

Birthday:

Month:  Day:  Year:

Email OK?  Yes  No  
Phone OK?  Yes  No  
Mail OK?  Yes  No

Cancel Accept

The customer can enter or edit the information and click Accept when done. A Thank You message is displayed and the browser returns to the idle screen. The information entered or edited is displayed on the Prism side.

**IMPORTANT:** The fields displayed in the browser may be different than the fields displayed in the Quick Customer screen based on the choices in the Configuration utility.

## Verifying Customer Information

Click the "Verify On Device" button to display the customer information on the browser. The customer can indicate whether or not the information is correct.

The information displayed on the verify screen is determined by the "Capture/Verify Screen" settings in Setup.

The verification screen in the browser will resemble:



## Welcome To Bob's Rocket Shop

Is Your Information Correct?

Bob Smith  
Address: 50 East St,  
Suite 5  
Ocala FL 34481  
Phone: 9167927061  
Email: zzq@zzq.com  
Birthday: November 17,  
Email OK? Y  
Phone OK? Y  
Mail OK? Y

No

Yes

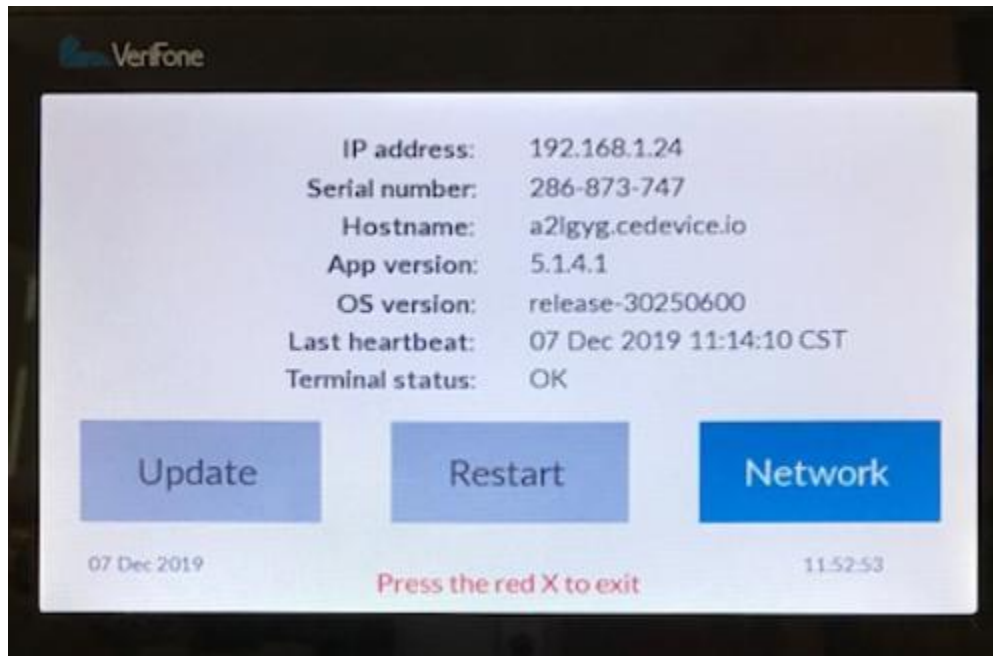
The screen title is set in the configuration utility.

The customer will respond with No or Yes. The No/Yes button captions are also set in the configuration utility.

## Appendix A – Genius Information

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To find the Host Name and IP address of the Genius device, enter 000 (three zeros) and then the password from the Genius idle screen.



## Appendix B – Technical Information

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### **MMPrismSvc.exe**

This service handles requests at the Prism Server level.

It is installed in the C:\Program Files (x86)\MMEnterprise\MMPrismSvc directory.

Log files from the service will also be found in this directory.

### **MMLDS.exe**

This service handles requests at the workstation level.

It is installed in the C:\Program Files (x86)\MMEnterprise\LDS directory.

Log files from the service will also be found in the C:\Program Files (x86)\MMEnterprise\LDS\Logos.

Log files specific to CK Customer Information Browser version will be found in the C:\Program Files (x86)\MMEnterprise\LDS\CKCustInfoW folder.

### **MMCKSvc.exe**

This service handles requests from the browser.

It is installed in the C:\Program Files (x86)\MMEnterprise\MMCKSvc directory.

Log files from the service will be found in the C:\Program Files (x86)\MMEnterprise\MMCKSvc\Logs directory.

Log files specific to CK Customer Information Browser version will also be found in the C:\Program Files (x86)\MMEnterprise\MMCKSvc\Logs directory but will have a file name starting with MMCIW.

### **C:\Program Files (x86)\MMEnterprise\PrismCustInfoW Directory**

This directory contains the Licensing and Configuration Utility and is used as a staging directory for install files.

License and config logs are found in C:\Program Files (x86)\MMEnterprise\PrismCustInfoW\Logs.

Install logs from the CKCustInfoWPrismInstaller are found in C:\Program Files (x86)\MMEnterprise\PrismCustInfoW\InstallLogs.