Installation and User Manual
M&M Customer Information Kiosk – v2.x
For Retail Pro® Prism 1.14, 2.x
(Prism v2.3 Compatible)
and
(Optionally) Genius (Verifone) Device

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Overview

The M&M Customer Information Kiosk for Prism consists of a set of Prism add-on files for the CK Customer Information add-on and the Prism Customer Information Configuration utility (MMCustInfoLicConfig.exe).

The CK Customer Information installation includes MMPrismSvc.exe and MMLDS.exe. These two services are used by several M&M Prism add-ons. They are installed as needed by the CK Customer Information Prism Installer.

Installation should be done at every system with a Prism Proxy or Prism Server.

The Genius device does not have to be used with this modification.

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 using the manual.

Licensing

Licensing is done by Prism User ID and maximum number of Genius devices or workstations 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, add new customers to Prism and update information for existing customers.

The Quick Customer Information screen is used to perform these functions. What is displayed on this screen and the Genius device is determined by the CK Customer Information Setup.

When the Genius device is being used, buttons on the Quick Customer Information screen control what information is requested on the Genius.

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

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

Phone Number

In the Customer Information Kiosk, phone number is the primary identifier for a customer.

A phone number can be entered by the customer on the Genius device or by the cashier in the Quick Customer Information screen.

Phone information captured includes phone type and phone 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.

Address information includes address type and mail opt-in.

Email Address

Email address can also be included in the customer information and edited for existing customers or entered for new customers.

Email information includes email type and email opt-in.

Birthday

The Customer Information Kiosk can also capture the customer's birthday with or without a year. Birthday can be entered on the Genius device.

Opt-Ins

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

Installation

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

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

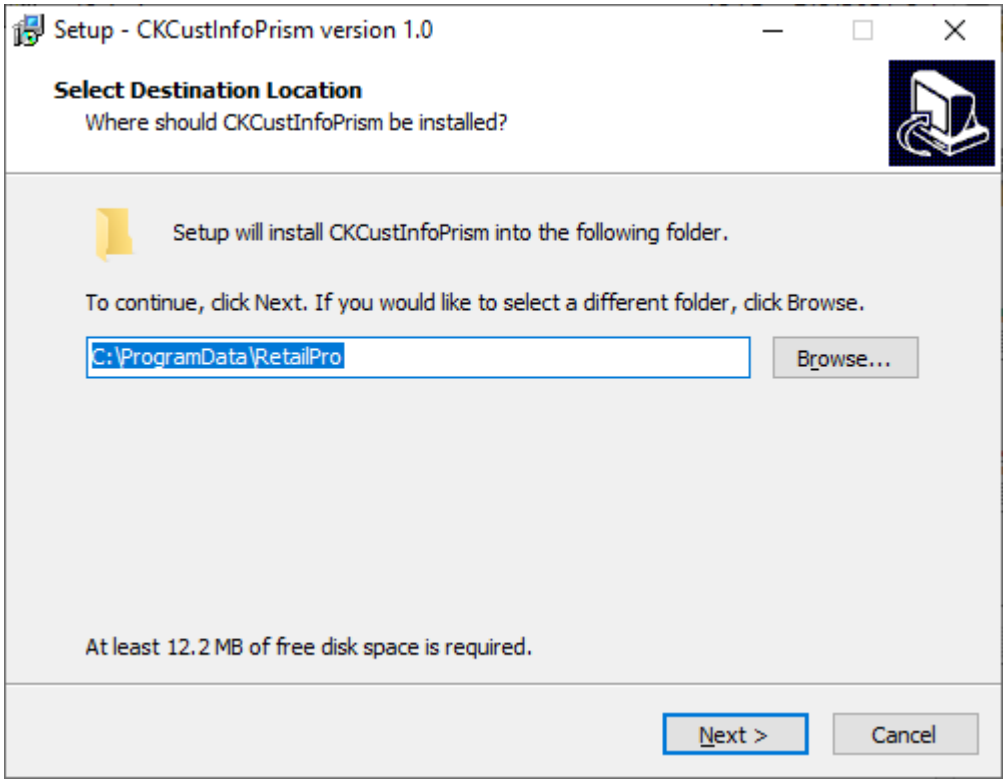
Installation Procedure

Installation is done at every system with a Prism Proxy (where the add-on will be used) and the systems with the Prism Server for those systems with proxies.

Note: Configuration is done at the "store" level (i.e. systems with the Prism Server installed). Therefore, the Configuration utility is only installed on those systems.

At each system, extract and run CKCustInfoPrismInstaller-vx.x.exe from the zip.

Install Location

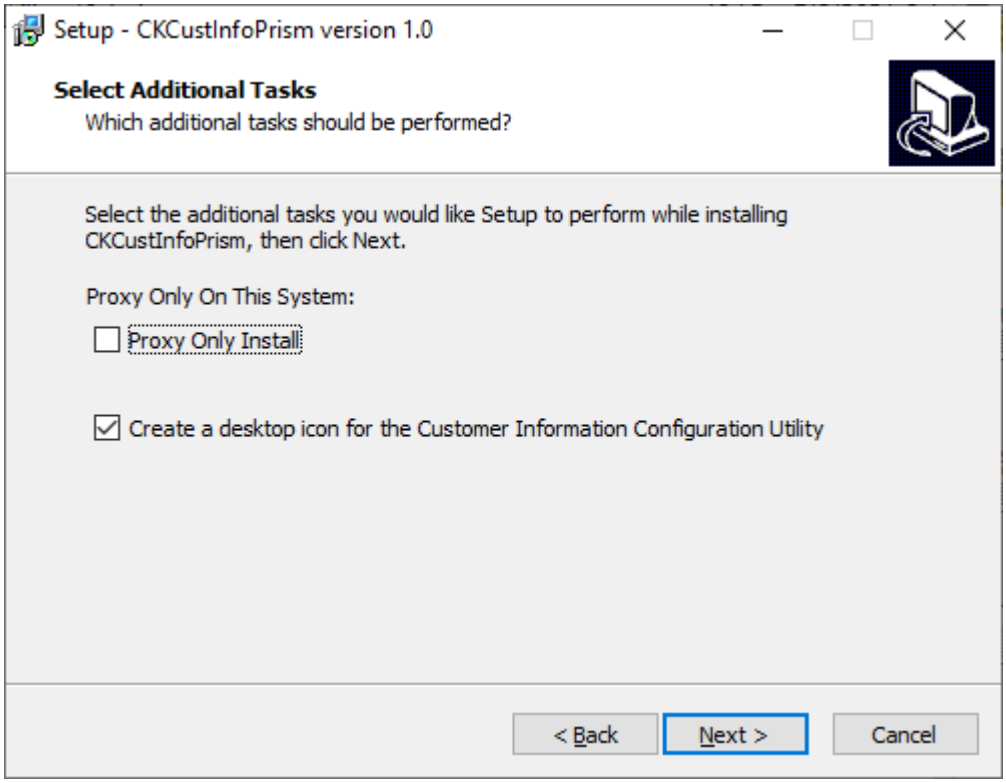


Normally, the installation destination will be the C:\Program Data\RetailPro folder. If the Prism Server has been installed in a different directory, enter or browse for that directory.

IMPORTANT: On systems where only the Prism Proxy is installed, this location is irrelevant and can be ignored.

When the Destination Location is correct, click Next>.

Proxy Only



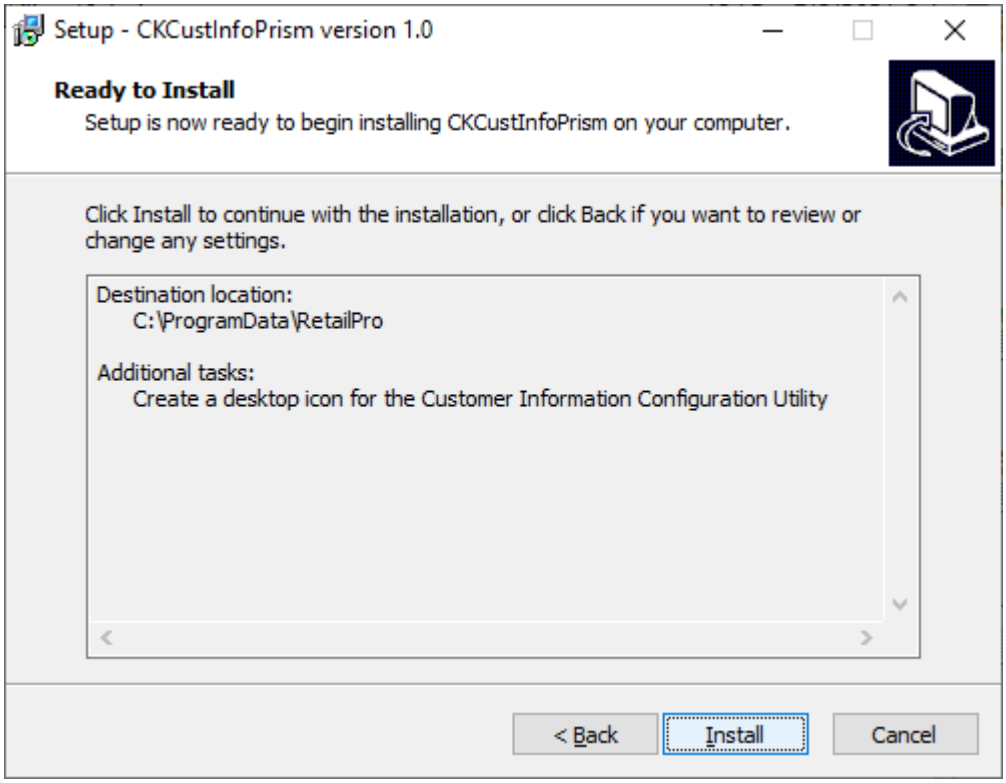
Check "Proxy Only Install" if the system only has the Prism Proxy installed (the Prism Server is on another system).

If "Proxy Only Install" is checked, creating a desktop icon for the Donation Configuration Utility is irrelevant.

If installing on a system with the Prism Server, the "Create a desktop icon…" checkbox is active.

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.

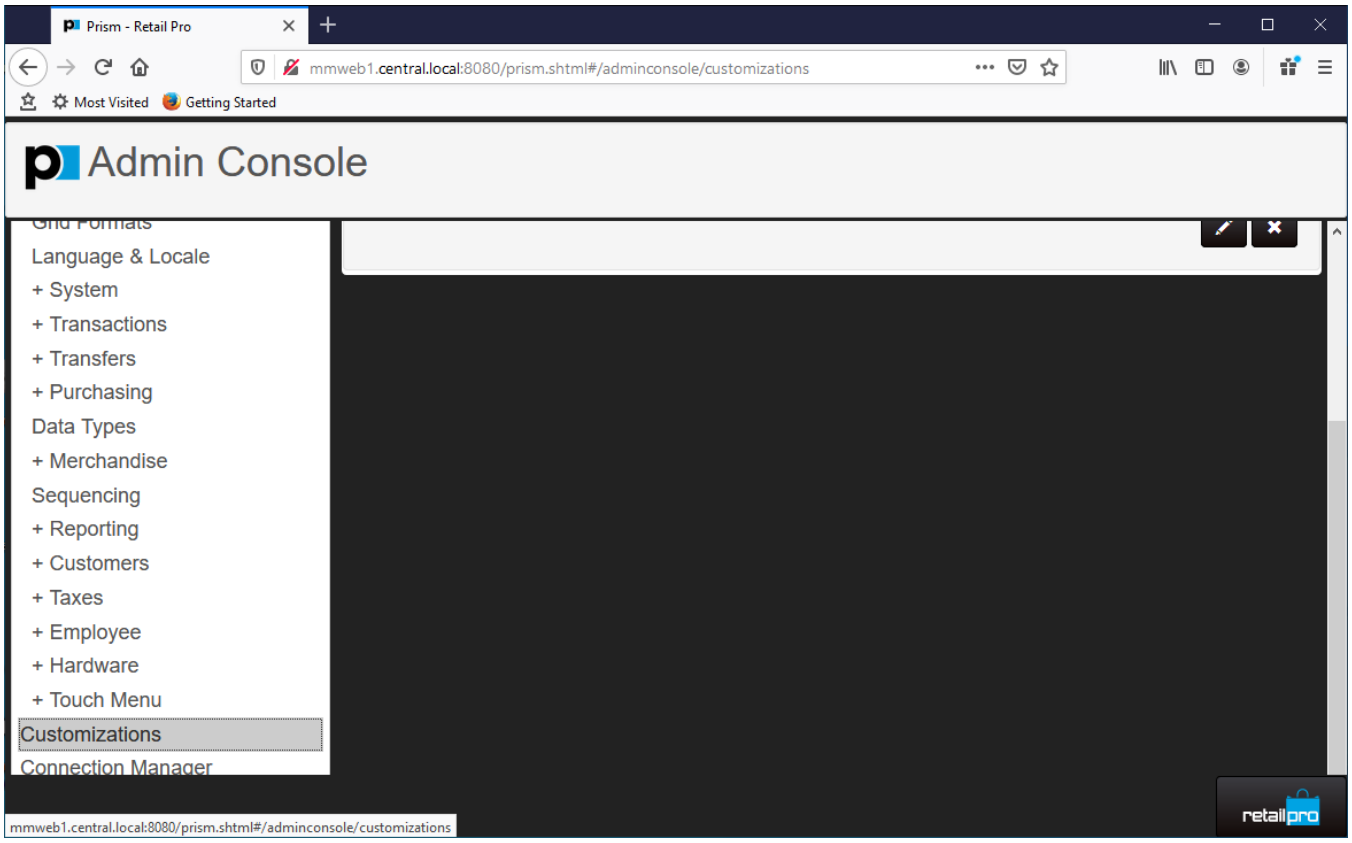
Prism Customization Setup

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

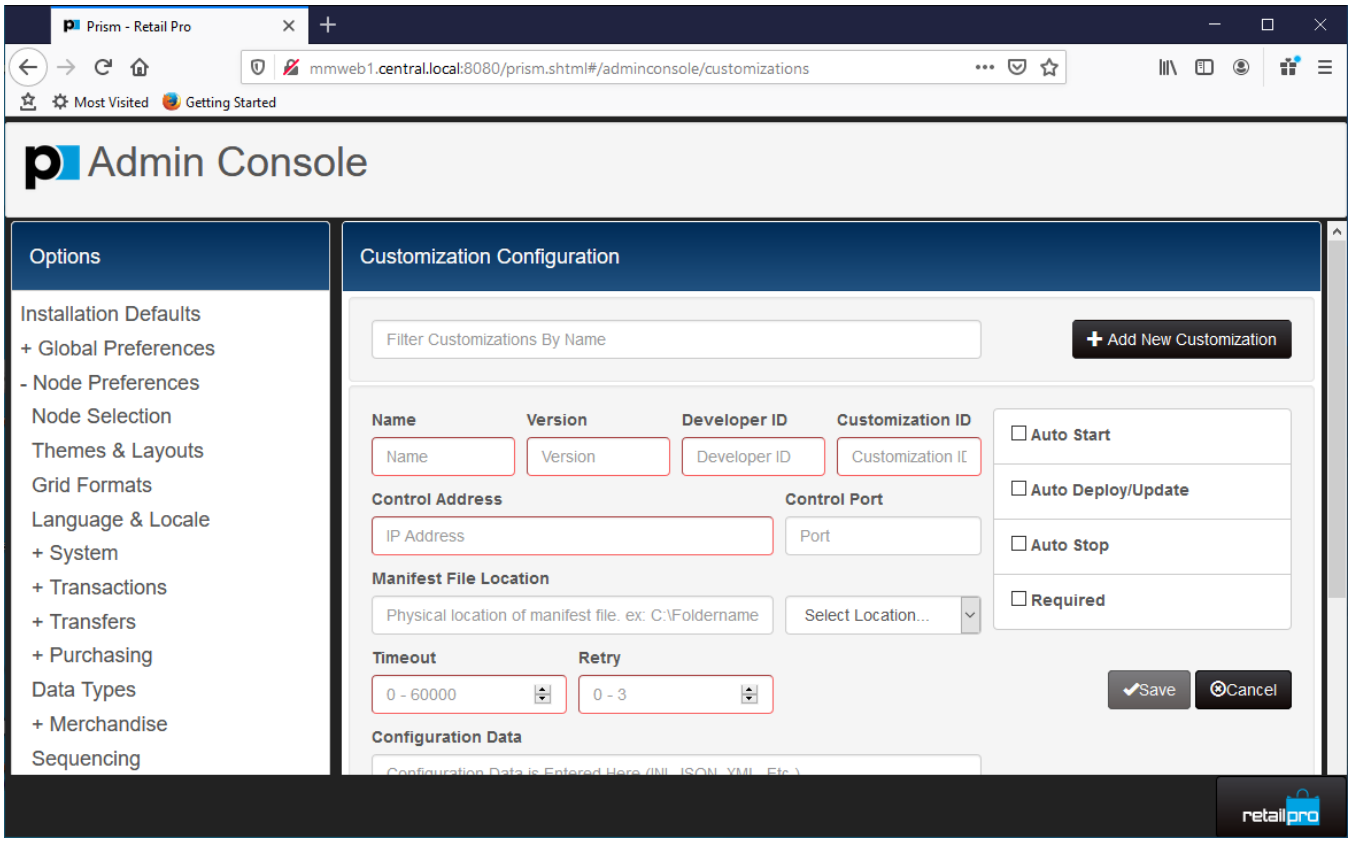
Start Prism on the workstation and navigate to the Administration Console.

Customization

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



In the right-hand panel, click Add Customization:



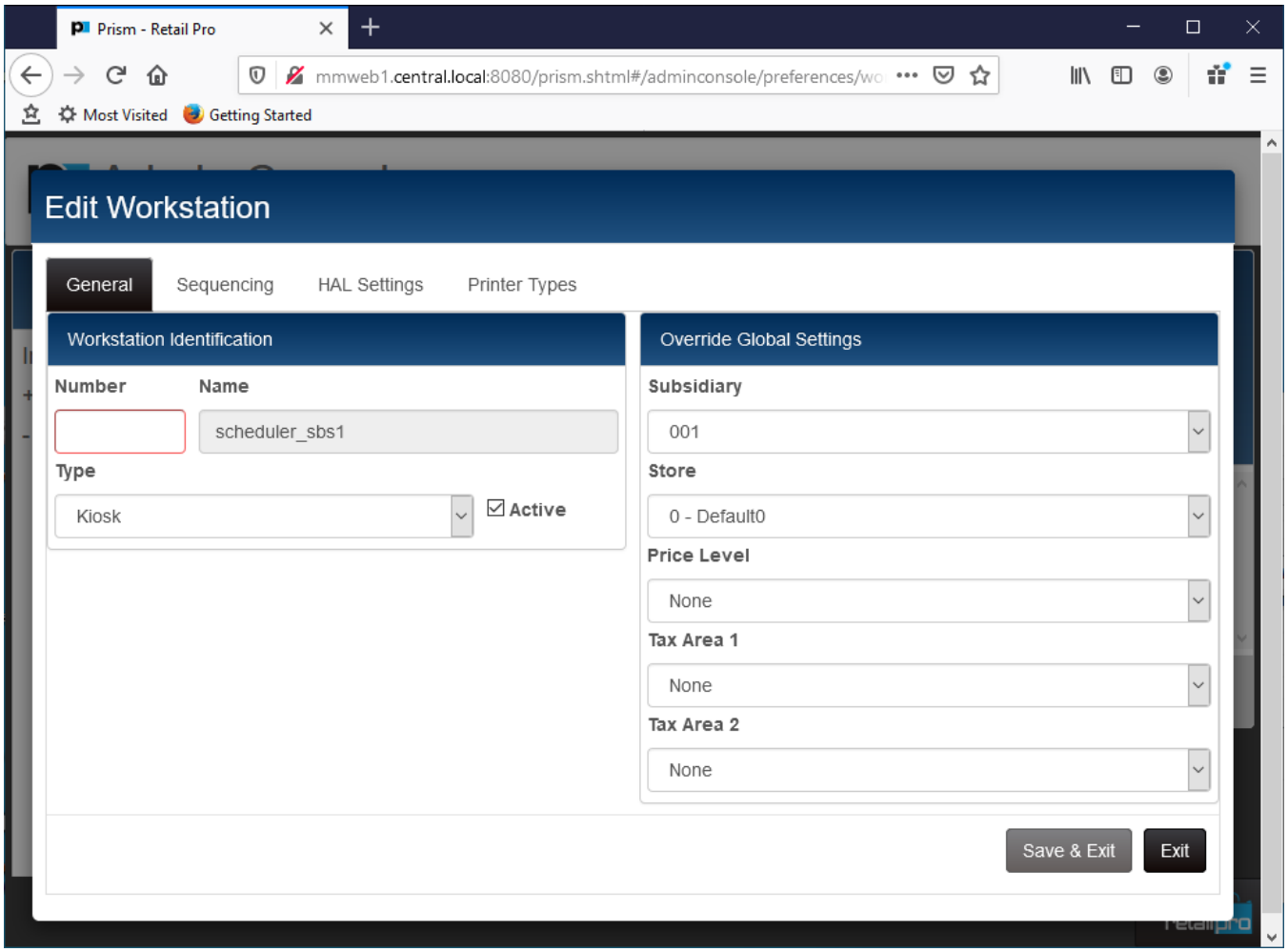
Fill in the following information:

Name LDS
Version 1.0.0
Developer ID 088
Customization ID 010
Control Address – IP Address of the workstation.
Control Port 28800
Timeout 50000
Retry 3
Check Auto Start
Click Save

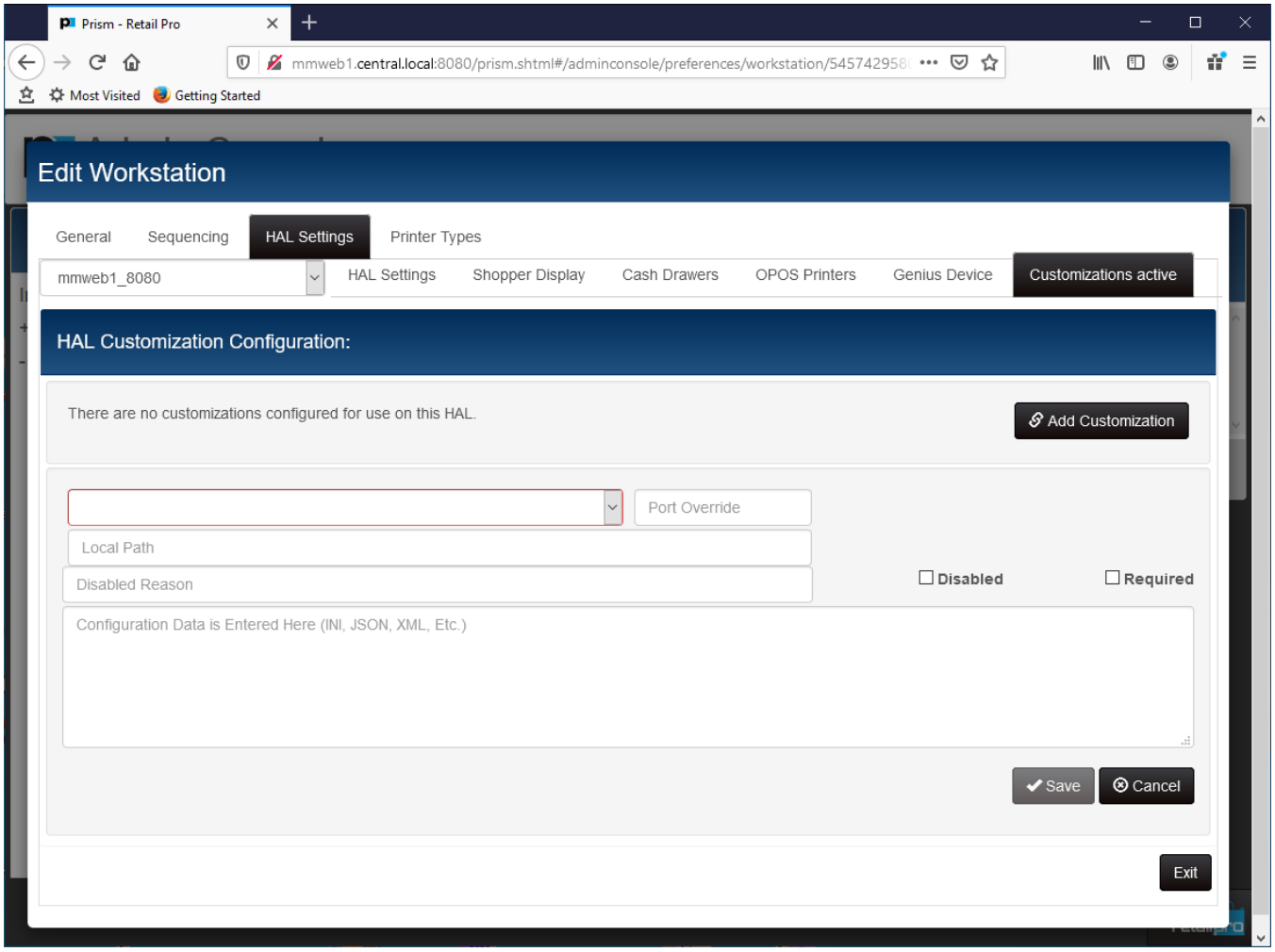
HAL Setting

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
Most Visited
Getting Started
Edit Workstation
General
Sequencing
HAL Settings
Printer Types
Workstation Identification
Number
Name
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.

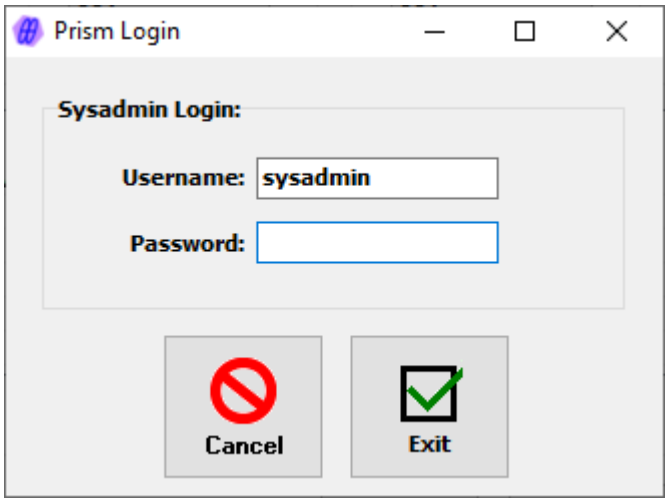
Set the Local Path to C:\Program Files (x86)\MMEnterprise\LDS\MMLDS.exe.

Click Save.

Customization setup is complete.

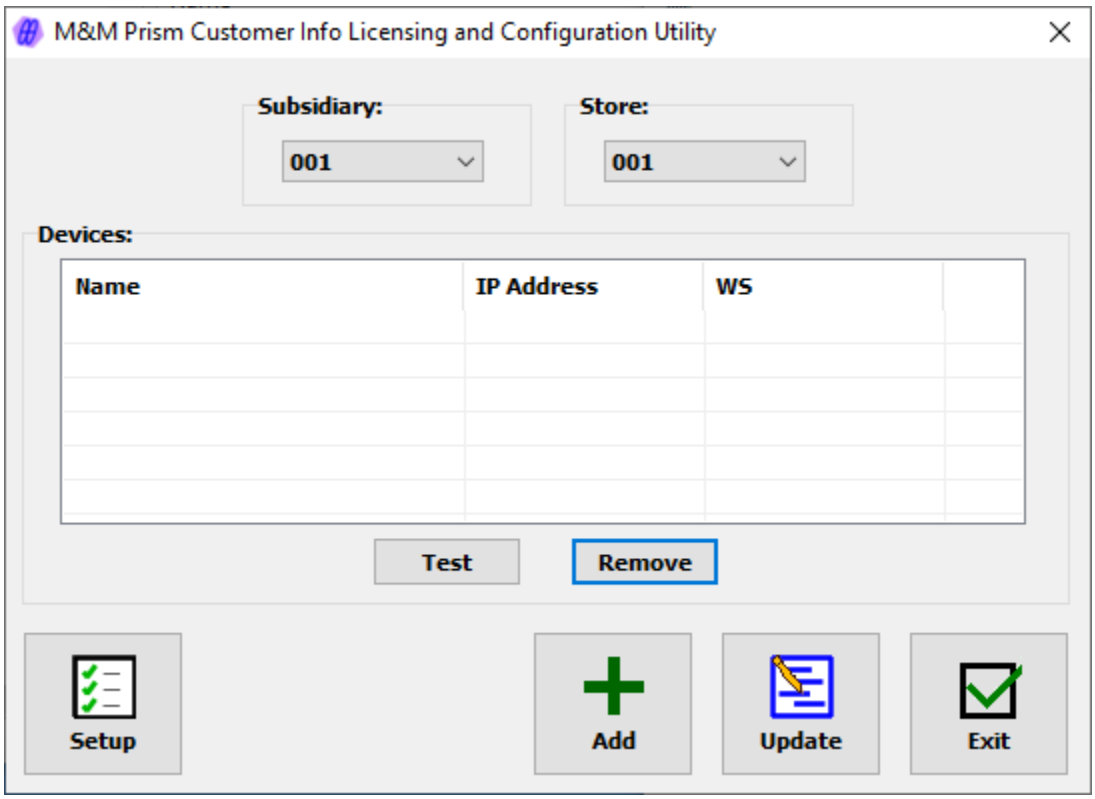
CK Customer Information Configuration

Run the MMCustInfoLicConfig.exe utility (PrismCustInfoConfig shortcut or from CK Cust Info>Configuration on the Start Menu). For Prism versions below 2.3, the Prism Login screen is displayed:



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

The utility main screen will be displayed:



This screen is used to select a Genius device for Setup. If the Genius device is not being used, it is used to do setup for a workstation.

It is also used to assign devices to workstations or remove device assignments.

Select the Subsidiary and Store.

If any Genius devices or workstations are already assigned to the Subsidiary/Store, they will be displayed in the rid.

Adding a Device

To add a device, click the Add button. Add is used even when a Genius device is not being used. The Add Genius Device screen is displayed:

Enter the Genius device host name. This name can be found on the Genius device (See Appendix A).

If the Genius device is not being used, enter a dummy host name.

Enter the IP address of the device. See Appendix A for information on how to find this on the device itself.

If the Genius device is not being used, enter a dummy IP address (1.1.1.1).

Select the Workstation the device should be assign to.

If the Genius device is not being used, select the Workstation that should be configured.

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:

"Host Name is already assigned." – The name is already assigned to a workstation.

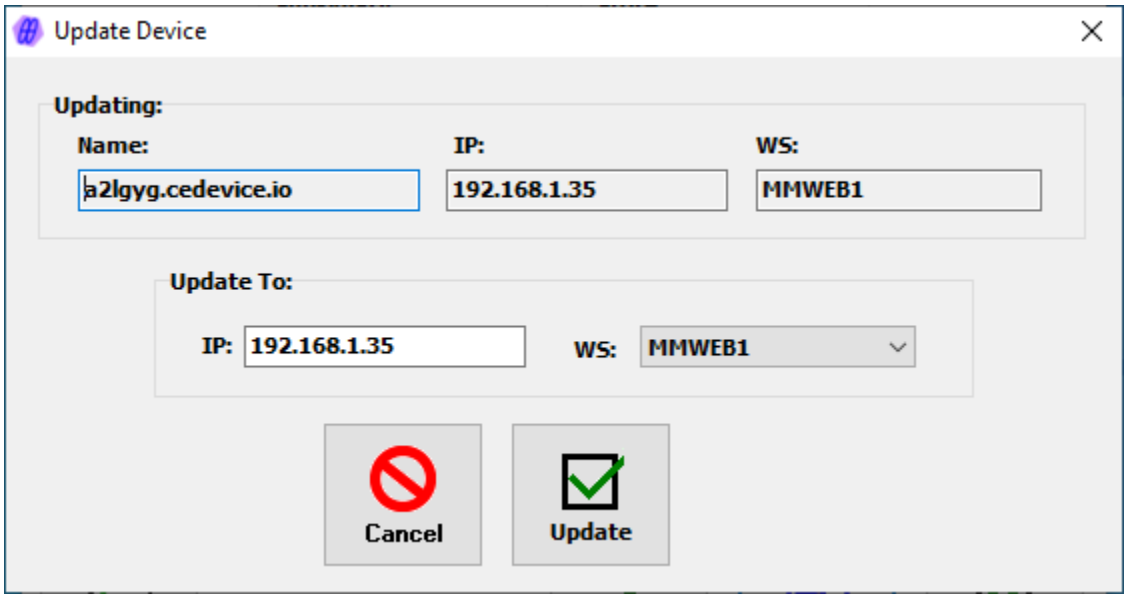
"IP Address is already assigned." – The IP Address is already assigned to a workstation.

"A device is already assigned to this Workstation." – Another Genius device or an iPad is assigned to the workstation for the CK Customer Information plugin.

"The user has allocated all their devices." – Adding this device/workstation would exceed the maximuim number of devices in the end user's license.

Updating a Device

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



Enter the new IP Address and/or Workstation 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.

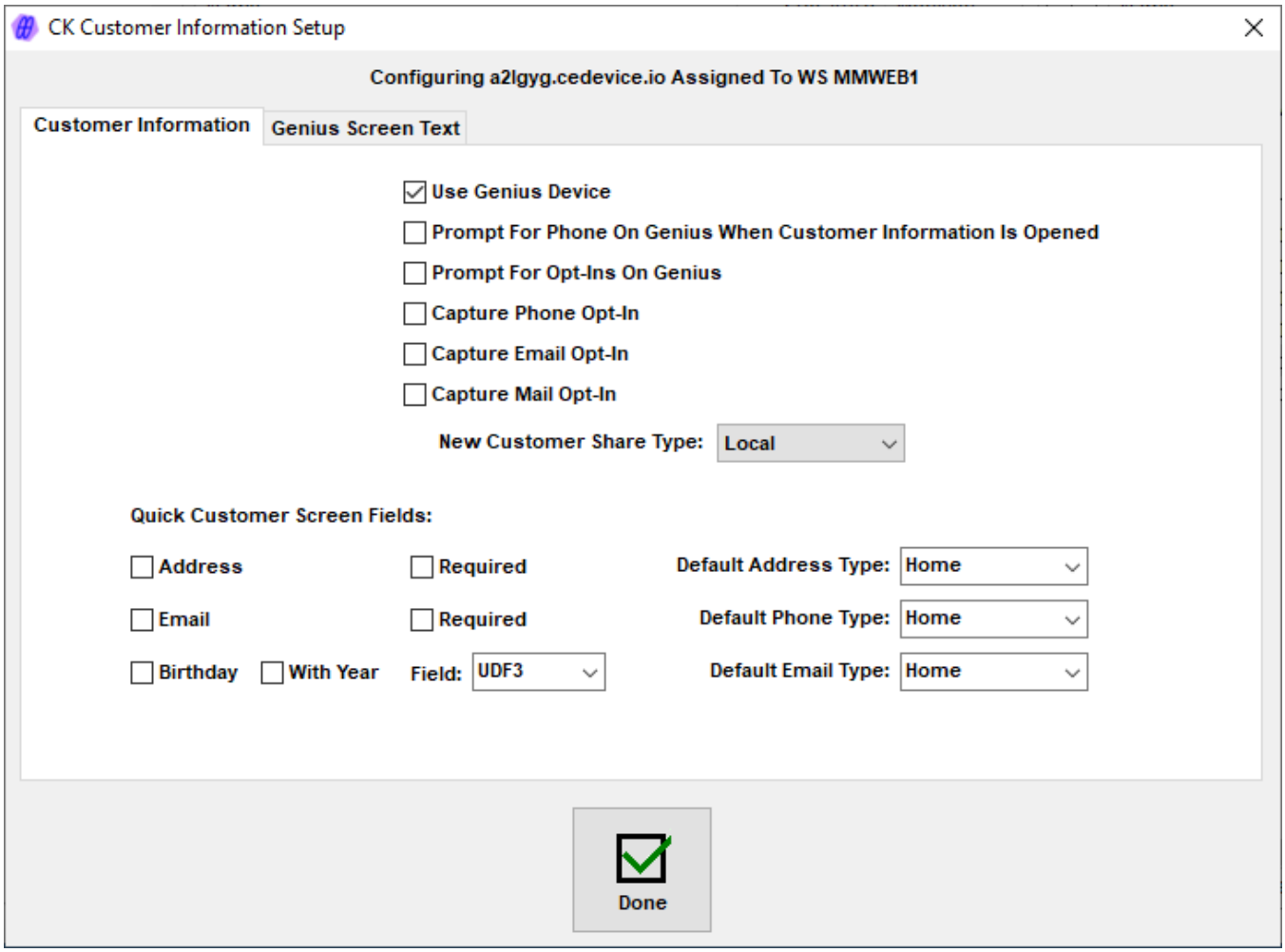
The Test Button

To test Genius device with the plugin, select the device and click Test. Do not use the Test button for dummy devices.

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

Setup

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



Customer Information Tab

This tab is used to configure what information can be captured by the add-on, what is required and the wording of what is displayed on the Genius device.

Use Genius Device – Check this option to use the Genius device. Even if "Use Genius Device" is checked, any information that can be captured on the Genius can also be entered by the cashier.

Prompt For Phone On Genius When Customer Information Is Opened – If checked, the customer is asked to enter their phone number on the Genius device when the Quick Customer screen is displayed. If not checked, the cashier can cause this prompt to be displayed from the Quick Customer screen.

Prompt For Opt-Ins On Genius – If checked, the cashier can cause the Genius device to prompt for opt-ins.

Capture Phone Opt-In – Includes Phone as one of the opt-ins.

Capture Email Opt-In – Includes Email as one of the opt-ins.

Capture Mail Opt-In – Includes Mail as one of the opt-ins.

New Customer Share Type – The Prism share type assigned to new customers.

Quick Customer Screen Fields

Phone, Phone Type, First Name, Last Name, Title and Share Type are always displayed on the Quick Customer Information screen. The default phone type and Share Type can be selected.

The following fields can be displayed on the Quick Customer Information screen. Check the fields that should be included. Check "Required" if the information is required.

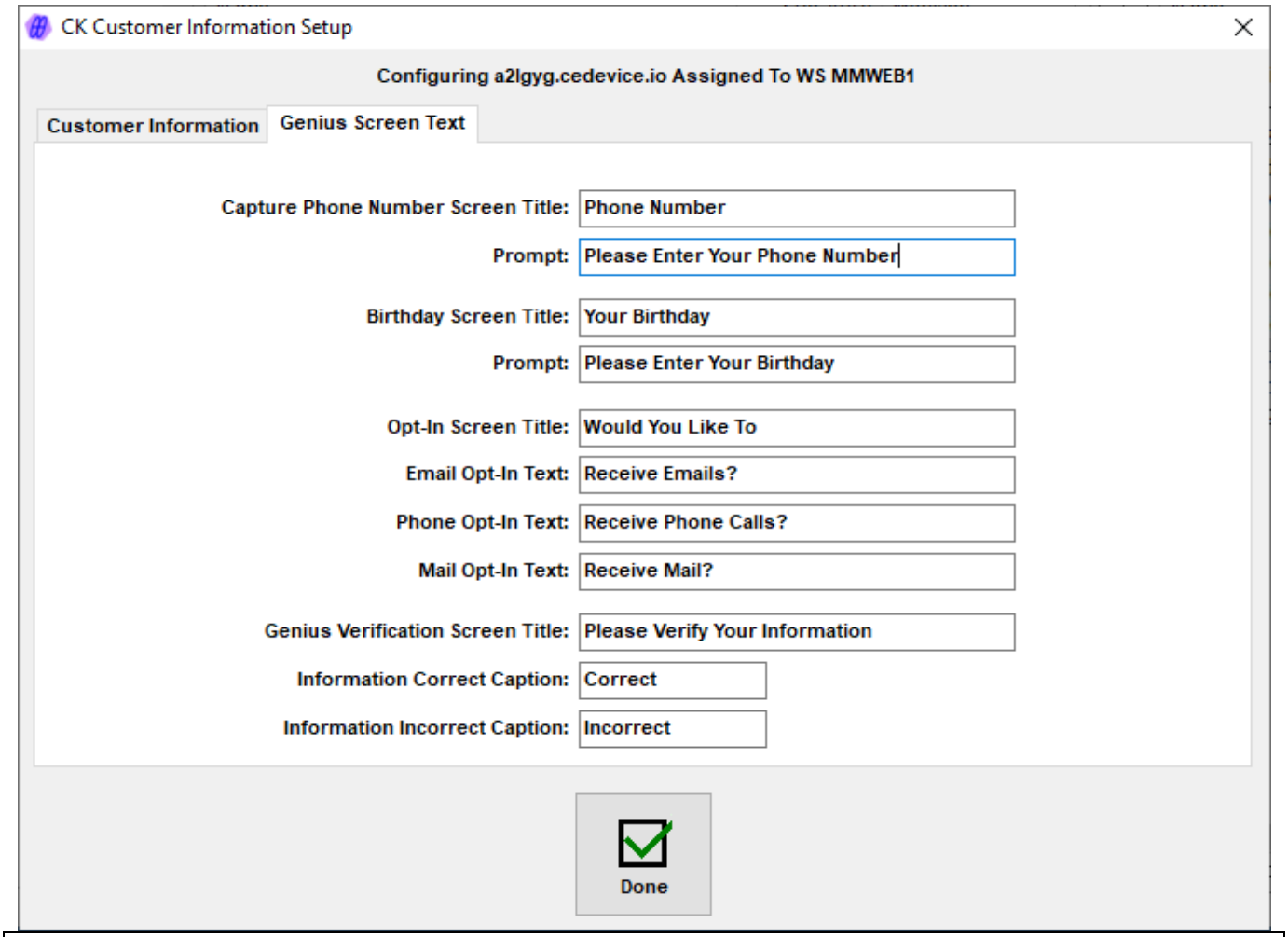
Address – Includes two address lines, city, state, zip and address type. Mail opt-in can be included. The default address type can be selected from the drop down.

Email – Includes email address and email type. Email opt-in can be included. The default email type can be selected from the drop down.

Birthday – Can include year. If year is not included, month and day are captured. A customer UDF field must be selected for the date.

Genius Screen Text Tab

When the Genius device is being used, text for the various Genius screens is entered on this tab:



Sample entries are shown.

Capture Phone Number Screen Title – Title that is displayed at the top of the screen when capturing phone number.

Prompt – The prompt that is displayed asking the customer for their phone number. The phone number entry is directly below this.

Birthday Screen Title – Title that is displayed at the top of the screen when capturing birthday.

Prompt – The prompt that is displayed asking the customer to enter their birthday. The birthday entry panel will be either month/day or month/day/year.

Opt-In Screen Title – Title that is displayed at the top of the screen for capturing opt-ins. All opt-ins (that are included) are captured on a single screen.

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

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

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

Genius Verification Screen Title – Title that is displayed at the top of the screen when displaying customer information for verification.

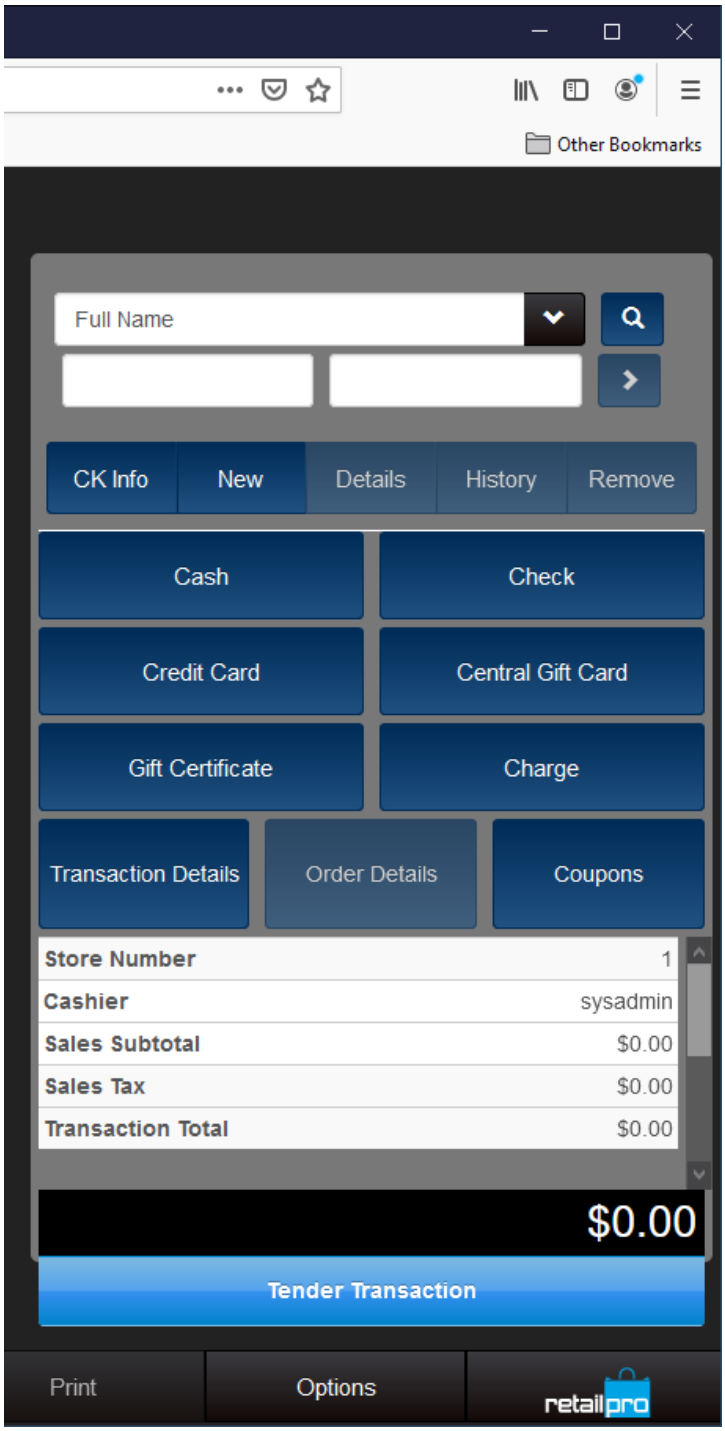
Information Correct Caption – The wording that appears on a button on the Genius device when customer information is correct.

Information Incorrect Caption – The wording that appears on a button on the Genius device when customer information is incorrect.

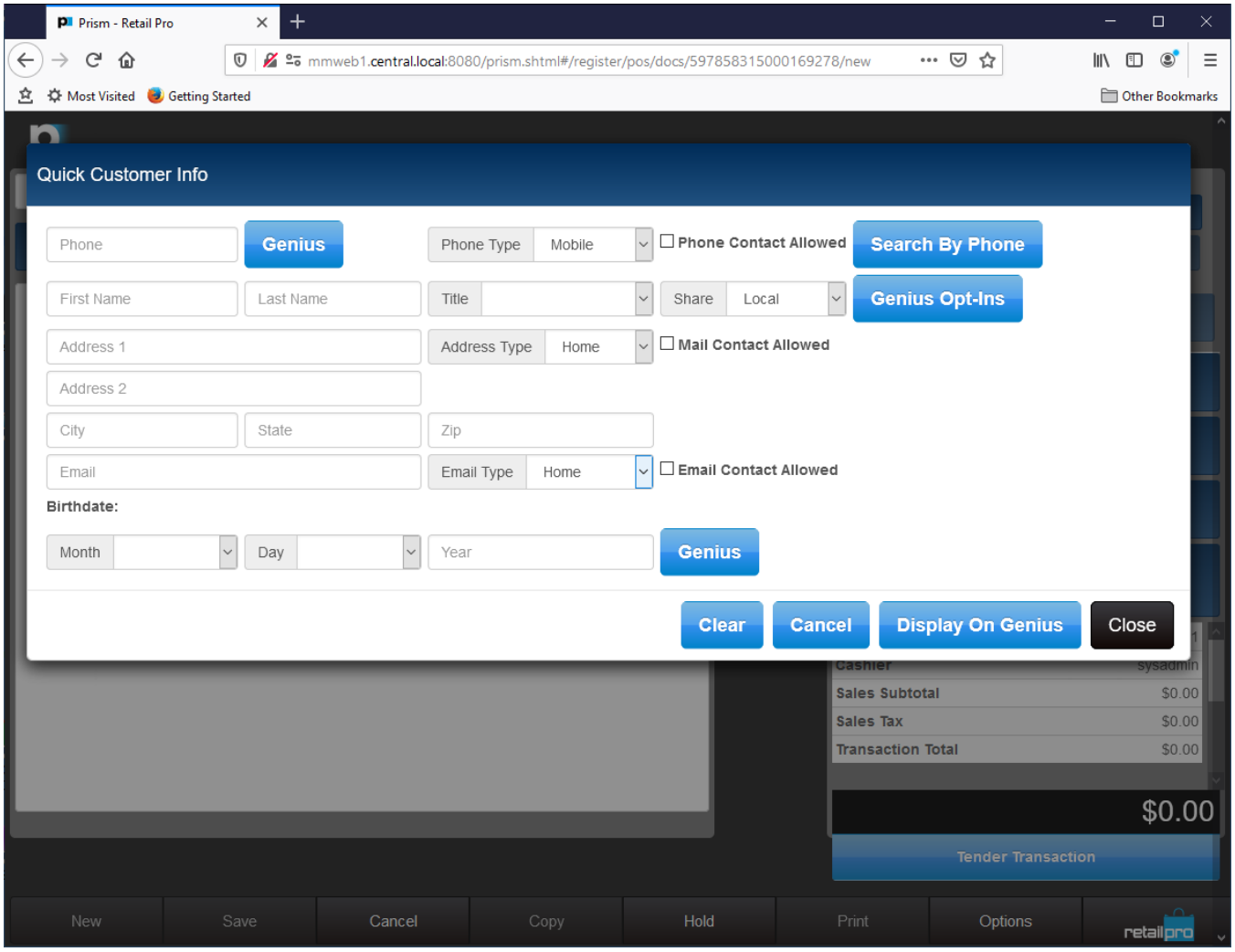
Operation

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:



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

If the Genius device is not being used, the Genius buttons will not be displayed.

Customer information can be entered for new customers and edited for existing customers.

Phone Entry and Search

If "Prompt For Phone On Genius When Customer Information Is Opened" was selected, the Genius device would prompt the customer to enter their phone number. On the Prism screen, the "Waiting for Genius device…" message will be displayed.

Note: When any screen is presented on the Genius, the customer has 45 seconds to respond. Therefore, it is best to display the phone prompt on the Genius when the customer is at the register and ready to respond.

If "Prompt For Phone On Genius When Customer Information Is Opened" was not selected, the cashier can cause the phone prompt to be displayed by clicking the Genius button next to the Phone input.

When a phone number is entered on the Genius, "Search By Phone" is performed and if a matching customer is found, that customer is displayed on the screen.

The cashier can also enter a phone number manually in the Phone box.

Search By Phone

When a phone number is entered manually, the cashier can click the "Search By Phone" button to find the customer based on phone number. If a matching customer is found, their information is displayed.

Phone Type

Phone type can be selected from the drop down. It is set to the existing value for existing customers.

Phone Contact Allowed

This is the phone opt-in selection. It can be set by the cashier or collected from the Genius device.

If "Capture Phone Opt-In" was not selected in Setup, this checkbox is not displayed.

Customer Name

Customer first name, last name, title and share type are displayed regardless of selections in Setup.

This information can be edited for existing customers.

Address

If address is included in Setup, two address lines, city, state, zip and address type are displayed.

If Capture Mail Opt-In is checked in Setup, the Mail Contact Allowed checkbox is displayed.

Email

If email is included in Setup, the email address and email type are displayed.

If Capture Email Opt-In is checked in Setup, the Email Contact Allowed checkbox is displayed.

Birthday

If birthday is included in Setup, the birthday fields are displayed. Birthday can include year if it is selected in Setup.

Birthday (month/day or month/day/year) can be captured on the Genius device by clicking the Genius button next to the birthday inputs.

Genius Opt-Ins

Clicking the Genius Opt-Ins button will display all opt-ins that are included on the Genius device. The customer will be able to select Yes or No for each opt-in.

Display On Genius

When "Display On Genius" is clicked, the customer's information is displayed on the Genius device so the customer can verify the information. The wording of the title of this screen captions of buttons is entered in Setup.

Clear

Click Clear to clear all fields. If there is existing information, a confirmation message is displayed.

Cancel

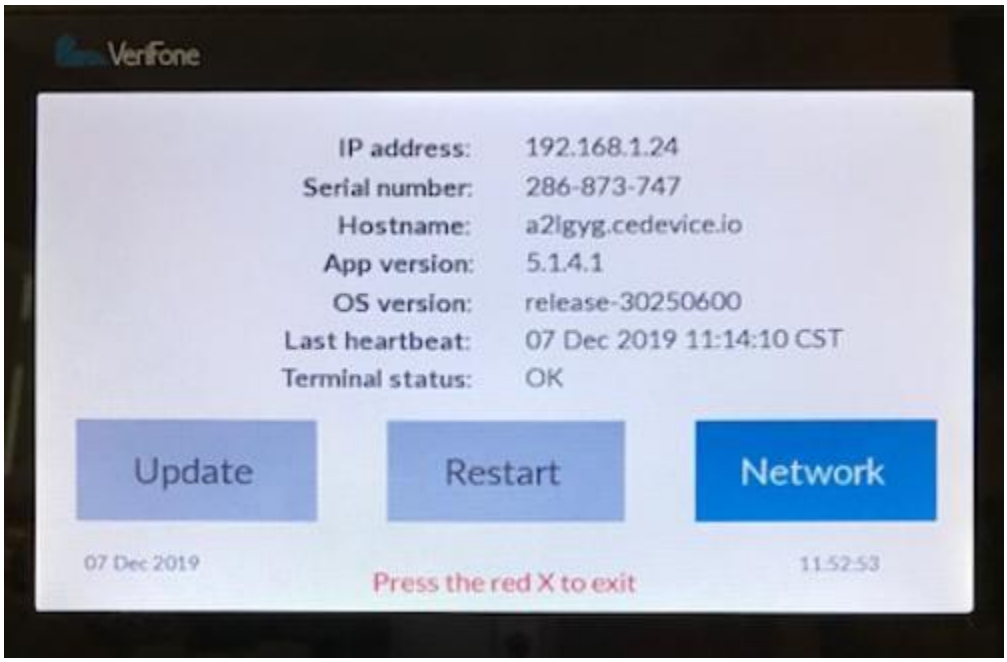
Use Cancel to exit the Quick Customer Information screen without making any changes.

Close

When Close is clicked the customer information is saved and the customer is added to the receipt.

Appendix A – Genius Information

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

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 this directory.

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

C:\Program Files (x86)\MMEnterprise\PrismCustInfo Directory

This directory contains the Licensing and Configuration Utility and its logs.

It also contains logs from the CKCustInfoPrismInstaller.