

**Installation and User Manual**  
**M&M V9 Customer Information Kiosk – v1.x**  
**For Retail Pro® 9-Series v9.3, 9.4**  
**and**  
**Genius (Verifone) Device**

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## **Overview**

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The M&M Customer Information Kiosk system consists of the Customer Information Plugin (for Genius) and the M&M RPro Data Service.

### **Customer Kiosk Genius Plugins**

There are six plugins in the M&M Customer Kiosk family:

MMCKCustInfo – The Customer Information plugin. Identify, capture and verify customer information at POS.

MMCKDocCapture – The Document Signature Capture plugin. Display and capture signatures on documents.

MMCKSigCapture – The Signature Capture plugin. Capture signatures for user-defined reasons.

MMCKDonation – The Donation plugin. Allow customers to enter donations to organizations.

MMCKTip – The Ask For Tip plugin. Ask customers for tips.

These plugins operate with Genius devices dedicated to single workstations. However, each device can run with multiple plugins on the RPro side. For example, a single Genius device (assigned to one workstation) will work with all plugins simultaneously.

### **M&M RPro Data Service**

The M&M RPro Data Service is a utility program that is installed at the HQ system only.

### **Customer Information Plugin**

The Customer Information Plugin is a Retail Pro plugin that is installed on the local store Retail Pro system. It provides the Customer Information functionality:

Customer Identification – Customers can identify themselves by entering a phone number on the Genius device. This can be done automatically when a new Receipt is started or initiated by the cashier.

Customer Information Capture – A Customer Information screen is displayed in Retail Pro where the cashier can enter selected customer information. Some information like phone number, opt-in and birthday can be captured on the Genius device.

Customer Information Verification – Information for existing customers is displayed on the Genius device. The customer can respond with correct or incorrect. If the customer responds with incorrect a Customer Information screen is displayed in Retail Pro where the cashier can correct the information. Some information like phone number, opt-in and birthday can be captured on the Genius device.

### **Licensing**

Each Customer Kiosk plugin is licensed by the Retail Pro User ID and maximum number of devices (iPads and Genius) that can be used for that plugin.

For example, if the Customer Information Kiosk plugin is licensed for 4 devices then up to 4 iPads and Genius devices (total) can be assigned to workstations at any stores for Customer Information.

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

## **Installation**

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

CKCustInfoInstaller-vx.x.exe – CK Customer Information Installer  
MM Customer Information Kiosk.pdf – This installation and user manual.  
Additional files for reference:

- MMCKCustInfoV.dll – Customer Information Kiosk Plugin.
- MMCKCustInfoV.mnf – Required manifest file.
- MMCKCustInfoCapt.bmp – Required bitmap.
- MMCKCustInfoIdent.bmp – Required bitmap.
- MMCKCustInfoVer.bmp – Required bitmap.
- MMRProDataSvc.exe – M&M RPro Data Service utility.

### **CKCustInfo Plugin**

Extract and run the CKCustInfoInstaller-vx.x.exe. This installs all files.

Other files in the zip are provided for reference and do not need to be extracted or installed.

### **M&M RPro Data Service**

The M&M RPro Data Service is installed at the HQ system only.

After installation, the M&M RPro 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 data service will be found in the C:\Program Files (x86)\MMEnterprise\MMRProDataSvc directory.

The data service must be available from the Internet. This may require opening the data service port on a router.

### **Retail Pro Menu Setup**

In Retail Pro go to the Receipt Form View screen and add the "Customer Ident", "Capture Cust Info" and "Verify Cust Info" buttons to the side menu.

Go to the Sales Order Form View screen and add the "Customer Ident", "Capture Cust Info" and "Verify Cust Info" buttons to the side menu.

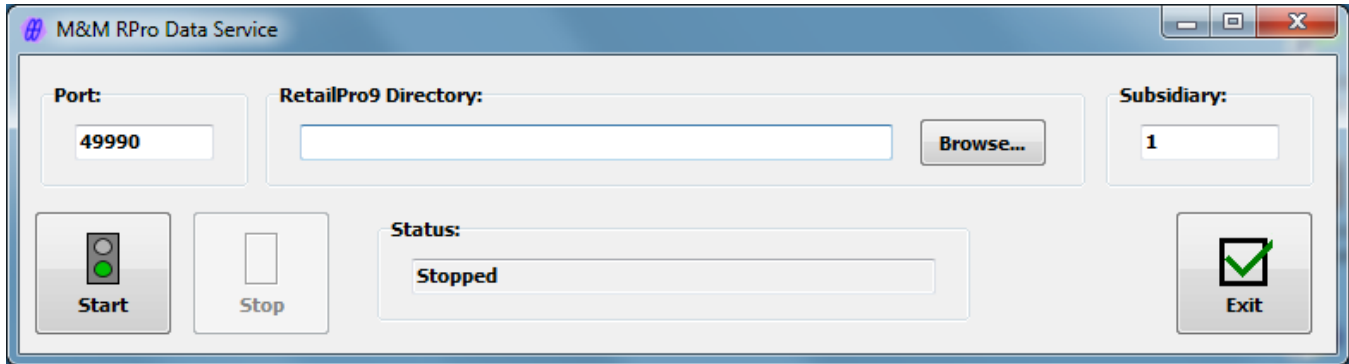
## Setup

To set up the Customer Information Kiosk, perform the following steps:

- 1) Start the M&M RPro Data Service at the HQ system.
- 2) Do Setup in Retail Pro for the Customer Information Kiosk.

## Start The M&M RPro Data Service

At the HQ System, start the data service from the Start Menu or using the desktop shortcut.



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 Information 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.

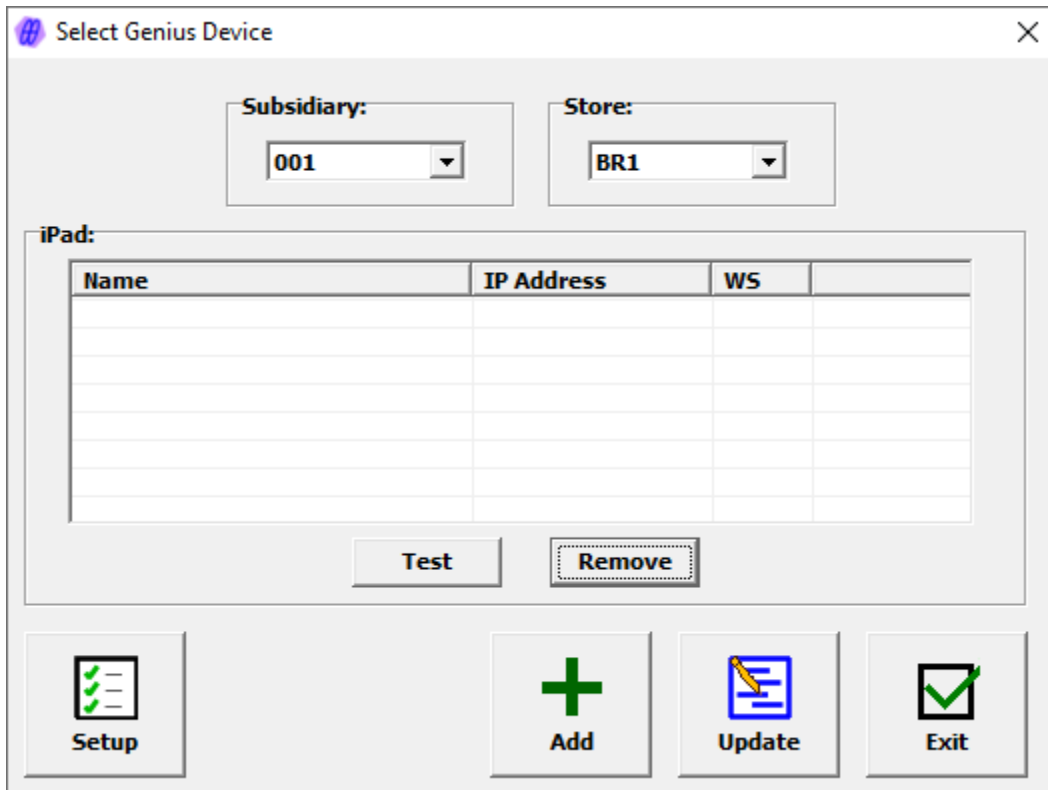
## Customer Information Kiosk Plugin (Retail Pro) Setup

Start Retail Pro. Navigate to the Workstation Preferences screen.

Select User Interface Plug-ins in the left-hand panel.

Locate and double click the "Customer Kiosk Customer Info Setup (Genius Device)" entry.

The Select Genius Device screen is displayed:



| Name | IP Address | WS |
|------|------------|----|
|      |            |    |
|      |            |    |
|      |            |    |
|      |            |    |
|      |            |    |

This screen is used to select a Genius device for Setup.

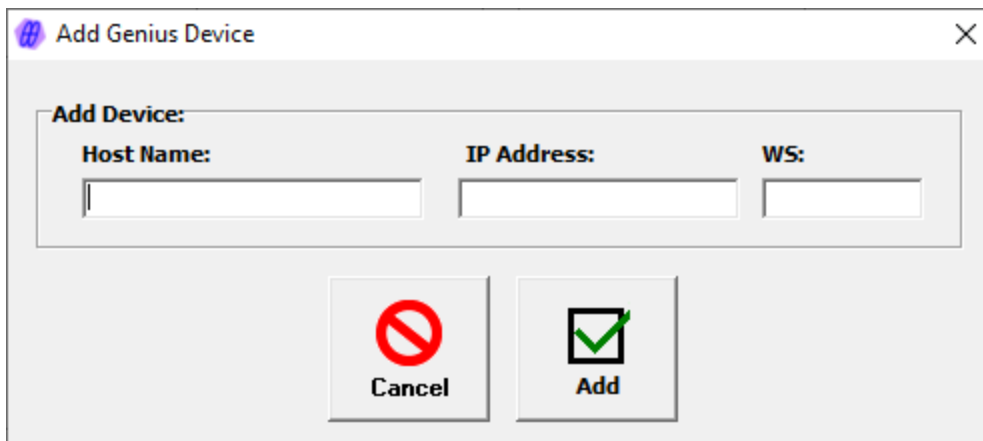
It is also used to assign devices to workstations or remove device assignments.

Select the Subsidiary and Store.

If any Genius 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 Genius Device screen is displayed:



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

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

Enter the Retail Pro Workstation the device should be assign to.

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 Customer Kiosk Customer Information plugin.

“The user has allocated all their devices.” – Adding this device would exceed the maximum 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:

The screenshot shows a dialog box titled "Update Device". It contains two main sections. The first section, labeled "Updating:", has three input fields: "Name:" containing "a2lgyg.cedevic.io", "IP:" containing "192.168.1.24", and "WS:" containing "1". The second section, labeled "Update To:", has two input fields: "IP:" containing "192.168.1.24" and "WS:" containing "1". At the bottom of the dialog are two buttons: "Cancel" with a red prohibition sign and "Update" with a green checkmark.

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.

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



## Setup

Select a Genius device from the list and click the Setup button. The Capture/Verify Customer Information Setup screen is displayed. There are four tabs on the Setup screen: Identification, Genius Capture, Genius Verification and Capture/Verify Fields.

The Host Name of the device being configured and the workstation are displayed at the top of the screen.

### Identification Tab

The screenshot shows a software window titled "Customer Kiosk - Genius Device - Capture/Verify Customer Information Setup" with a close button (X) in the top right corner. Below the title bar, the text "Configuring a2lgyg.cedevic.io Assigned To WS 1" is displayed. The window contains four tabs: "Identification", "Genius Capture", "Genius Verification", and "Capture/Verification Fields". The "Identification" tab is active. Inside the main content area, there is a checkbox labeled "Display Identification Screen On New Receipt" which is currently unchecked. Below this, the text "Genius Screen Text:" is followed by two input fields. The first is labeled "Title:" and the second is labeled "Instruction Line:". At the bottom center of the window, there is a "Done" button featuring a green checkmark icon.

The Identification screen on the Genius device is used to capture the customer's phone number.

Display Identification Screen On New Receipt – If checked, the Customer Identification screen is displayed on the Genius when a new receipt is started in Retail Pro. When the Identification screen is displayed a "Waiting For Customer Identification" dialog is displayed in Retail Pro. If needed, the cashier can close the screen on the Genius.

Genius Screen Title – This is a line of text displayed at the top of the Genius screen.

Instruction Line – This is a line of text displayed above the box where the phone number is entered.

## Genius Capture Tab

Customer information like name and address are entered by the cashier in Retail Pro using a Customer Information Capture/Verify screen with selected customer information.

However, phone numbers, birthday and opt-in selections can be entered by the customer on the Genius device.

The settings on the Genius Capture tab is used to configure these screens on the Genius device.

The screenshot shows a configuration window titled "Customer Kiosk - Genius Device - Capture/Verify Customer Information Setup". The window is for configuring a device assigned to "WS 1". It features four tabs: "Identification", "Genius Capture", "Genius Verification", and "Capture/Verification Fields". The "Genius Capture" tab is active and contains the following fields and options:

- Capture Phone Number Screen Title:** A text input field.
- Phone1 Prompt:** A text input field.
- Phone2 Prompt:** A text input field.
- Allow Birthday Capture On Genius**
- Birthday Screen Title:** A text input field.
- Birthday Screen Prompt:** A text input field.
- Allow Opt-In Capture On Genius**
- Screen Prompt:** A text input field.
- Email Opt-In Text:** A text input field.
- Phone Opt-In Text:** A text input field.
- Mail Opt-In Text:** A text input field.

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

Capture Phone Number Screen Title – Text for a line that appears at the top of the Genius screen when capturing a phone number.

Genius Phone Prompt 1 – The text of a line of text that appears above the text box used to capture Phone1 on the Genius screen.

Genius Phone Prompt 2 – The text of a line of text that appears above the text box used to capture Phone2 on the Genius screen.

Allow Birthday Capture On Genius – Check this box to allow the customer to enter their birthday on the Genius device.

Birthday Screen Title – Text for a line that appears at the top of the Genius screen when capturing a birthday.

Birthday Screen Prompt – The text of a line of text that appears above the text box used to capture a birthday on the Genius screen.

Allow Opt-In Capture On Genius – Check this box to allow the customer to select their opt-in choices on the Genius device.

Screen Prompt – Text that appears at the top of the Genius screen for opt-in selection.

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

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

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

## Genius Verification Tab

Customer Kiosk - Genius Device - Capture/Verify Customer Information Setup

Configuring a2lgyg.cedevic.io Assigned To WS 1

Identification | Genius Capture | **Genius Verification** | Capture/Verification Fields


**Verify Existing Customer Information On Genius**

Genius Verification Screen Title:

Information Correct Caption:

Information Incorrect Caption:

**Verify Existing Customer Information In Retail Pro**

 Done

**Verify Existing Customer Information On Genius** – If checked then customer information is presented to the customer for verification on the Genius device. This is done after an existing customer is found after identification. Note that if this box is not checked, the cashier can initiate verification on the Genius device using a button on the side menu of the Receipt screen.

**Genius Verification Screen Title** – Text line that appears at the top of the Genius screen for verification.

**Information Correct Caption** – Button caption for correct information.

**Information Incorrect Caption** – Button caption for incorrect information.

**Verify Existing Customer Information In Retail Pro** – If checked then the Customer Information Verification screen is displayed in Retail Pro if verification is not done using the Genius device. Note that the Customer Information Verification screen is also displayed if the Genius device is used and the customer indicates that the information is not correct. In addition, the Verify Cust Info side button will always cause the Customer Information Verification screen to be displayed.

## Capture/Verification Fields Tab

Customer Kiosk - Genius Device - Capture/Verify Customer Information Setup

Configuring a2lgyg.cedevic.io Assigned To WS 1

Identification | Genius Capture | Genius Verification | **Capture/Verification Fields**

Check The Fields That Should Be Displayed For Customer Capture and Verification:

Address  Is Required

Email  Is Required

Phone 1  Is Required

Phone 2  Is Required

Email Opt-In

Phone Opt-In

Post Opt-In

Birthday  With Year Field: UDF2  Is Required

New Customers Join Loyalty Bronze

Done

This tab is used to determine which customer fields are displayed on the Customer Information screen for capture and verify and which are required.

Address – Three address lines and zip code.

Email – Email address.

Phone1 and Phone2 – Refer to the Retail Pro Customer Phone1 and Phone2 fields.

Email Opt-In, Phone Opt-In and Mail Opt-In – Determine which (if any) opt-in choices are displayed.

If checked, the customer’s birthday (month and day only) are captured.

With Year – If checked, then the customer’s full birth date (month, day and year) are captured.

Birthday Field – The customer field to use for the birthday. If only month and day are captured, the choices are UDF3 – UDF8. If year is also being captured, the choices are UDF1 – UDF8.

New Customers Join Loyalty – Check this box and select a Loyalty Level to have new customers automatically enrolled in loyalty.

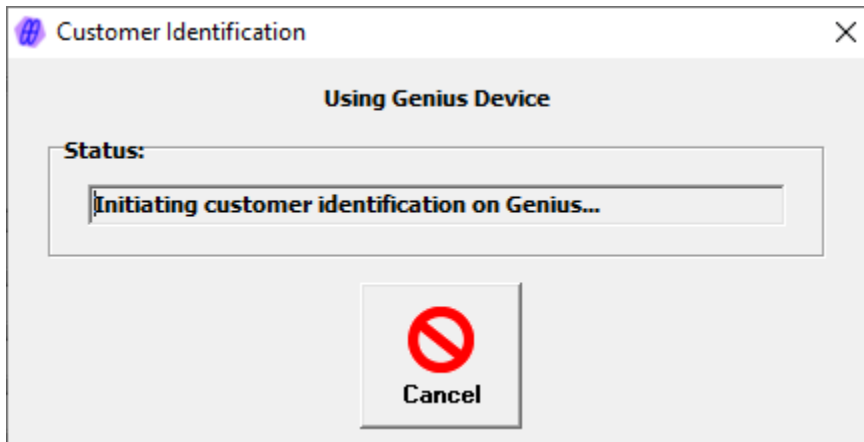
## Operation

### Customer Identification New Receipt

If "Display Identification Screen On New Receipt" was checked in Setup, then the Customer Identification screen is displayed when a new receipt is started in Retail Pro.

#### In Retail Pro

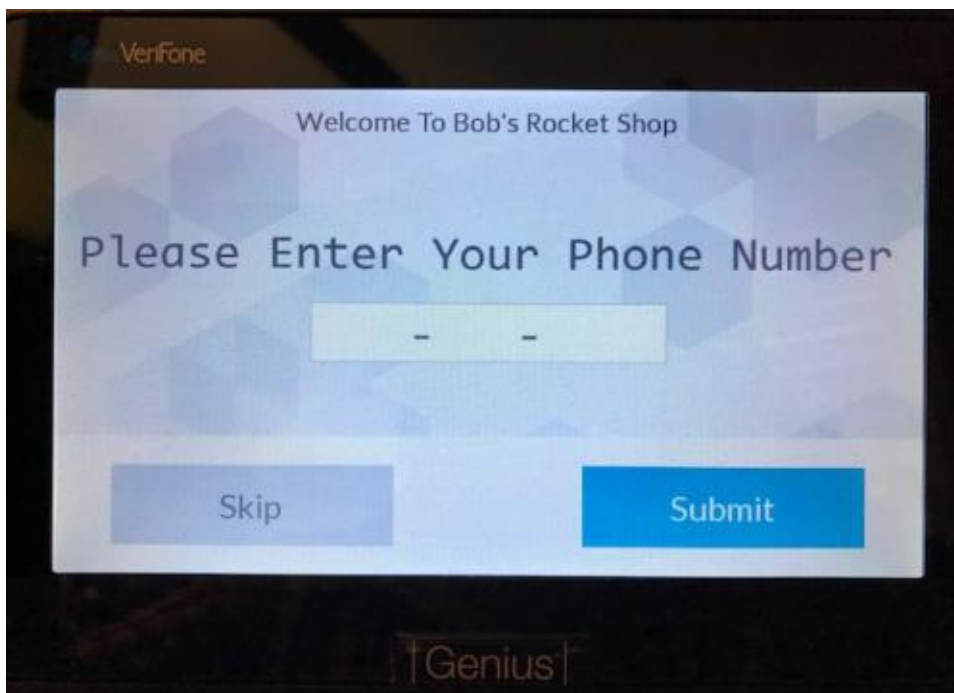
In Retail Pro, the Customer Identification screen will be displayed:



Note that if communication with the Genius cannot be established, error and/or Retry messages may be displayed.

#### On The Genius

On the Genius, the Customer Identification screen is displayed:



## Identification Actions

The following actions can be taken once the Customer Identification screen is displayed on the Genius:

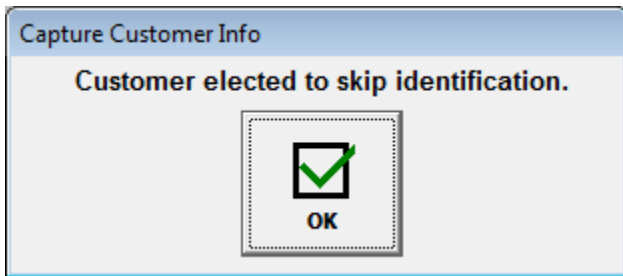
### ***Cashier Clicks Cancel***

The cashier can click Cancel on the Customer Identification screen in Retail Pro. This will close the screen on the Genius device.

### ***Customer Touches "Skip" on Genius***

The customer can touch "Skip" on the Genius. This closes the Customer Identification screen on the Genius.

In Retail Pro, the cashier will see:



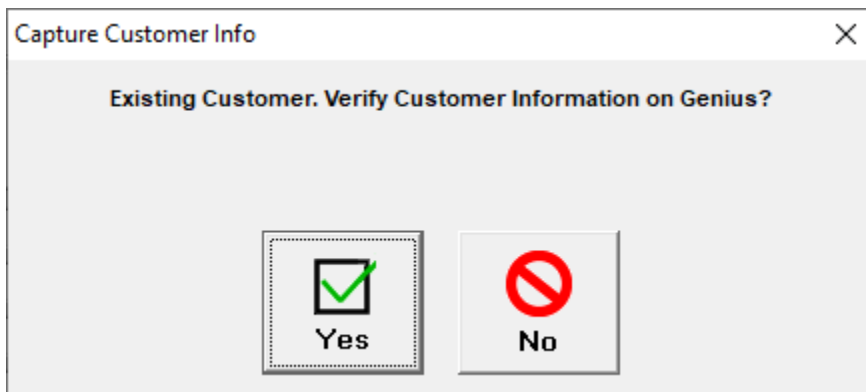
When OK is clicked, control returns to the receipt screen.

### ***Customer Touches Submit on the Genius***

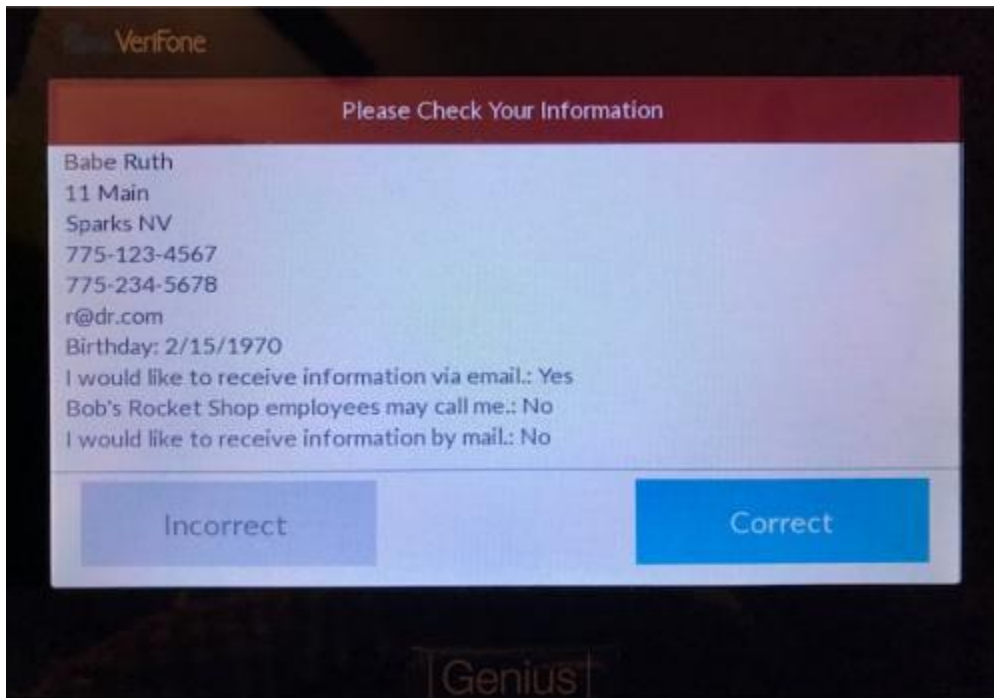
The customer can enter their phone number and touch the "Submit" on the Genius. This closes the Customer Identification screen on the Genius.

If the customer is not found in Retail Pro, the Capture New Customer Information screen is displayed in Retail Pro (see below).

If the customer is found in Retail Pro and "Verify Existing Customer Information On Genius" is selected in Setup, the "Display Customer Verification" prompt is displayed:



Select Yes to display the customer's information on the Genius device for verification:



The information displayed is determined by the fields selected in Setup.

The customer can select Incorrect or Correct. (Captions are from Setup).

If Incorrect is selected, the Customer Information Verification screen is displayed in Retail Pro.

If Correct is selected, the customer is added to the receipt (or sales order) as the Bill To Customer.

If No is selected for "Verify Customer Information on Genius?" and "Verify Existing Customer Information In Retail Pro" is checked in Setup, the Customer Information Verification screen is displayed in Retail Pro.

If "Verify Existing Customer Information On Genius" is not selected in Setup but "Verify Existing Customer Information In Retail Pro" is selected in Setup, the Customer Information Verification screen is displayed in Retail Pro.



## Capture New Customer Information

New customer information is captured on the Capture New Customer Information screen in Retail Pro:

**Name\*:**  
First Name:  Last Name:

**Address:**  
Address 1:  Address 3:   
Address 2:  Zip:

**Phone:**  
Phone1\*:  Phone 2:

**Email\*:**

**Opt-In:**  
 Allow Email  Allow Phone  Allow Post

**Birthday:**  
 (mm/dd/yyyy)

The fields displayed on this screen are determined by the fields selected in Setup. Fields marked with an asterisk are required.

Click Cancel or enter the information and click Done.

Phone numbers, opt-on choices and birthday can be entered by the customer on the Genius device. Click the Genius button next to the field to capture on the Genius.

If the customer is found in Retail Pro, the Display Customer Verification prompt is displayed:

## Verify Customer Information

If the customer responds with Incorrect for verification on the Genius device or the Genius device is not used for verification, the Verify Customer Information screen is displayed:

Verify Customer Information

Name\*:  
First Name: Babe Last Name: Ruth

Address:  
Address 1: 11 Main Address 3: Sparks NV  
Address 2: Zip: 89441

Phone:  
Phone 1\*: 775-123-4567 Phone 2: 775-234-5678  
Genius Genius

Email\*:  
r@dr.com

Opt-In:  
 Allow Email  Allow Phone  Allow Post Genius

Birthday:  
2/15/1970 (mm/dd/yyyy) Genius

Cancel Done

The fields displayed on this screen are determined by the fields selected in Setup. Fields marked with an asterisk are required.

Edit the information directly on this screen.

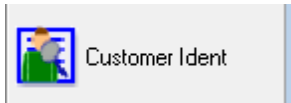
The Genius device can be used to have the customer enter phone numbers, opt-in choices or birthdays.

## Bill To Customer

If a customer is captured or verified, the customer is placed on the receipt as the Bill To Customer.

## **Manual Customer Identification (Receipt and Sales Order)**

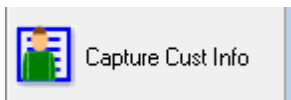
The Customer Ident button on the receipt or sales order side menu can be used to display the Customer Identification screen on the Genius device:



From there, the Customer Information Capture screen or Customer Information Verification screen can be displayed.

## **Manual Customer Capture (Receipt and Sales Order)**

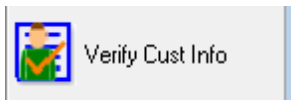
The Customer Information Capture screen can be displayed on in Retail Pro by clicking the Capture Cust Info button on the receipt or sales order side menu:



If customer information is entered, the customer is added to the Receipt or Sales Order.

## **Manual Customer Verification (Receipt and Sales Order)**

The Customer Information Verification screen can be displayed by clicking the Verify Cust Info button on the receipt or sales order side menu:



If "Verify Existing Customer Information On Genius" is selected in Setup, the "Verify Customer Information On Genius" prompt is displayed.

Otherwise, the Verify Customer Information screen is displayed in Retail Pro.

## 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 – File Locations

### Plugin

|                       |                    |
|-----------------------|--------------------|
| MMCKCustInfoV.dll     | RetailPro9\plugins |
| MMCKCustInfoV.mnf     | RetailPro9\plugins |
| MMCKCustInfoCapt.bmp  | RetailPro9\plugins |
| MMCKCustInfoIdent.bmp | RetailPro9\plugins |
| MMCKCustInfoVer.bmp   | RetailPro9\plugins |

### DataSvc (HQ Only)

|                   |   |
|-------------------|---|
| MMRProDataSvc.exe | C:\Program Files (x86)\MMEnterprise\MMRProDataSvc |
|-------------------|---|

### Logs

|                   |   |
|-------------------|---|
| CKCustInfo        | RetailPro9\MM\CustKiosk\Logs\CustInfo*            |
| MMRProDataSvc.exe | C:\Program Files (x86)\MMEnterprise\MMRProDataSvc |

### Setup

|         |   |
|---------|---|
| CK*.ini | C:\Program Files (x86)\MMEnterprise\CustKiosk\Setup |
|---------|---|