

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

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Overview

The M&M Document Signature Capture Kiosk for the Genius device system consists of the Document Signature Capture Plugin and the M&M RPro Data Service.

M&M RPro Data Service

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

Document Signature Capture Plugin

The Document Signature Capture Plugin is a Retail Pro plugin that is installed on the local store Retail Pro system. It provides the Document Signature Capture functionality:

Document with Signature Capture – Display documents and capture customer signatures on the iPad.

Document Display – Display documents on the iPad.

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 Document Signature Capture 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

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

CKDocCaptureVInstaller-vx.x.exe – CK Document Capture Installer

MM Document Capture Kiosk Genius.pdf – This manual.

Additional files for reference:

MMCKDocCaptureV.dll – Customer Document Capture Kiosk Plugin.

MMCKDocCaptureV.mnf – Required manifest file.

MMCKDocCaptCapt.bmp – Required bitmap.

CustKiosk.mdb – Required file.

MMRProDataSvc.exe – M&M RPro Data Service utility.

CKDocCapture Plugin

Extract and run the CKDocCaptureVInstaller-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 "Document Sig/Capt" button to the side menu.

Go to the Sales Order Form View screen and add the "Document Sig/Capt" button to the side menu.

Go to the Customer Form View and Receipt List Lit View screens and add the "Signed Documents" button to the side menus.

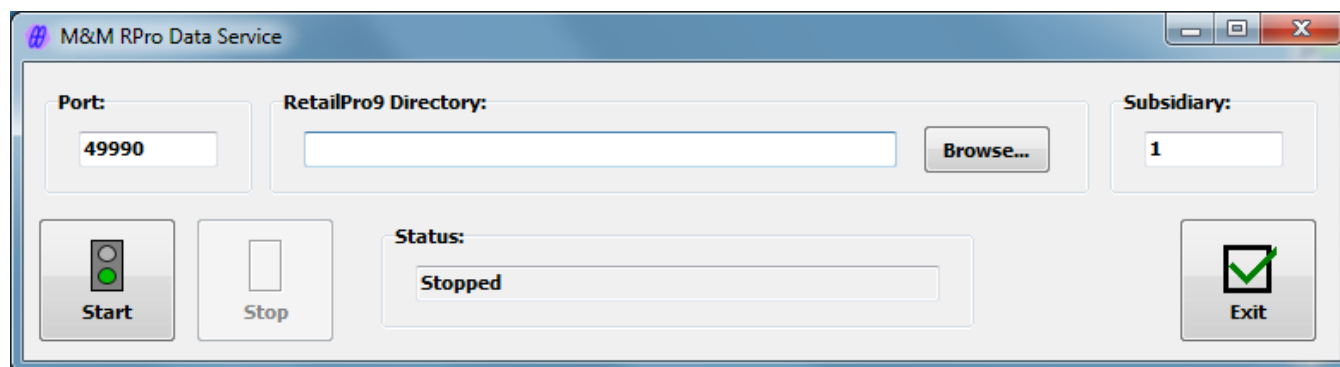
Setup

To set up the Document Signature Capture Kiosk, perform the following steps:

- 1) Start the M&M RPro Data Service.
- 2) Do Setup for the Document Signature Capture Kiosk plugin in Retail Pro.

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 Kiosk 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.

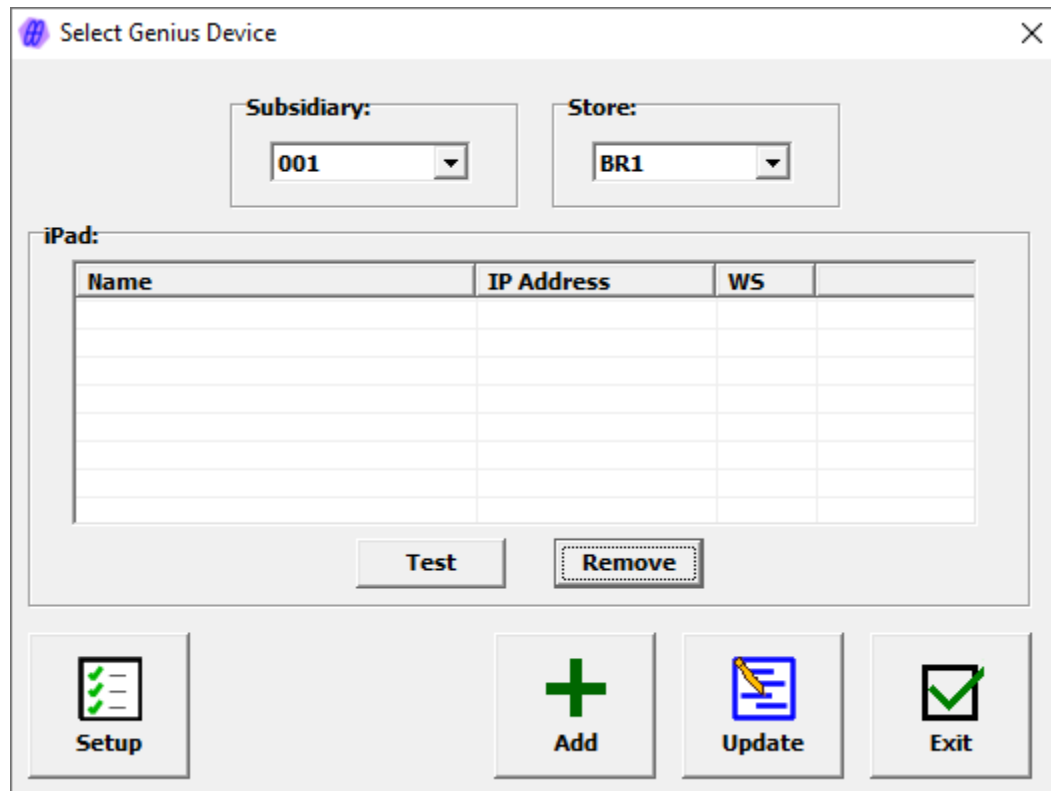
If this installation is on the Retail Pro HQ system and the Document Signature Capture plugin will be installed at stores, port forwarding must be setup for the M&M RPro Data Service port so the service can be accessed from the Internet.

Document Signature Capture 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 Document Capture 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.

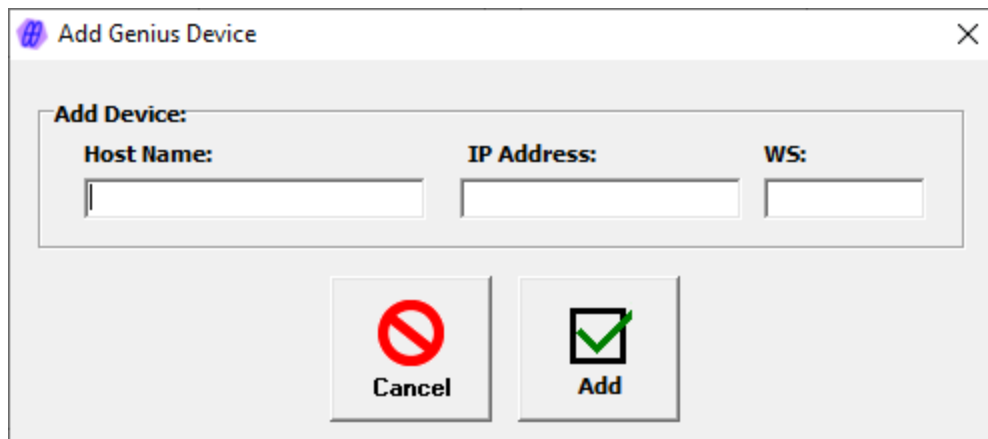
It is also used to assign devices to workstations or remove device assignments.

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.

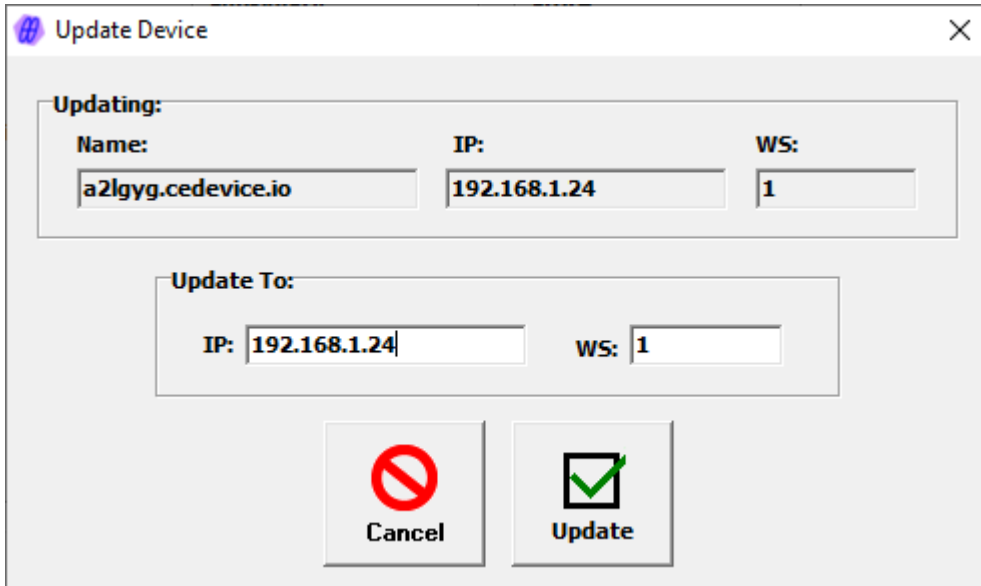
"IP Address is already assigned." – The IP Address is already assigned to a workstation.

"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:



Update Device

Updating:

Name: a2lgyg.cedevic.io IP: 192.168.1.24 WS: 1

Update To:

IP: 192.168.1.24 WS: 1

Cancel Update

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 device from the list and click the Setup button. The Document Signature/Capture Setup screen is displayed. There are four tabs on the Setup screen: General, Document Signature Capture, Document Display and Printers.

General Tab

The screenshot shows a software window titled "Customer Kiosk - Document Signature/Capture Setup" with a close button (X) in the top right corner. Below the title bar, a subtitle reads "Configuring a2lgyg.cedevic.io At 192.168.1.24 Assigned To WS 1". The window contains four tabs: "General", "Document Signature Capture", "Document Display", and "Printers". The "General" tab is active. Inside the tab, there is a checkbox labeled "This Is The HQ System" which is checked. Below this, a section titled "M&M Data Service (HQ):" contains a "Host:" label followed by an empty text input field, a "Port:" label followed by a text input field containing "49990", and a "Test" button. At the bottom center of the window is a "Done" button featuring a green checkmark icon.

This Is The HQ System – Check this box if this is the HQ system.

If Setup is being done on a store system that is NOT the HQ:

Host – Enter the Host (IP Address) of the HQ system running the M&M RPro Data Service. This should be the system on which Setup is being done.

Port – The port is automatically set to 49990 which the default port used by the M&M RPro Data Service. Normally there is no need to change this. It should only be changed if the Port was changed when installing the the M&M RPro Data Service.

Test – Click the Test button to test the connection to the data service. The data service must be running for the test to be successful.

Document Signature Capture Tab

Customer Kiosk - Document Signature/Capture Setup

Configuring a2lgyg.cedevic.io At 192.168.1.24 Assigned To WS 1

General | Document Signature Capture | Document Display | Printers

☐ Display Documents With Signature Capture

Accept Caption: Decline Caption:

General | DCS | UDF/Aux

Documents:

Document Name	File	On Update	Print	

Document Name: ☐ Capture Sig On Update/Save ☐ Print With Receipt/SO

Document File:

☒ Done

Entries on this tab are used to enable Document Signature capture, enter the text that appears on the Genius device and enter the documents that will be displayed.

Documents are presented with Accept and Decline buttons. If Accept is used, a separate signature capture screen is displayed.

All documents must PDF files.

Display Documents With Signature Capture – Check to enable document signature capture.

Accept Button Caption – Accept button caption. Should not exceed 18 characters.

Decline Button Caption – Decline button caption. Should not exceed 18 characters.

Documents Section

The documents that will be presented to the customer are entered in the Documents section. This section has three tabs: General, DCS and UDF/Aux.

Documents can be presented based on three criteria: General, DCS and UDF/Aux.

Genius Button

Click the Genius button to display the selected document on the Genius device. This can be used to check the formatting of the PDF.

Documents Section – General Tab

Documents entered in the General tab are presented for signature on every receipt or sales order.

The screenshot shows a software interface for managing documents. At the top, there are tabs labeled 'General', 'DCS', and 'UDF/Aux'. The 'General' tab is active. Below the tabs, there is a section titled 'Documents:'. Inside this section, there is a table with the following columns: 'Document Name', 'File', 'On Update', 'Print', and an empty column. The table is currently empty. To the right of the table, there are three buttons: 'Genius', 'Remove', and 'Add'. Below the table, there are two input fields: 'Document Name:' and 'Document File:'. To the right of the 'Document Name' field, there are two checkboxes: 'Capture Sig On Update/Save' and 'Print With Receipt/SO'. To the right of the 'Document File' field, there is a 'Browse...' button.

To add a document to the list:

Document Name – Enter a name for the document. This name will be displayed for the cashier and on the Genius device. The Document Name should not exceed 36 characters.

Capture Sig On Update/Save – Check this box to automatically present the document for signature when the receipt is updated or the sales order is saved. If this box is not checked, the cashier can present the document manually using a side menu button.

Print With Receipt/SO – If checked, the document, including signature, is printed when the receipt or sales order is printed.

Document File – Enter or browse for the PDF file.

Click the Add button. The document is added to the list.

To remove a document from the list, select it in the list and click Remove.

Documents Section – DCS

Documents entered in the DCS tab are presented for signature when an item with a selected DCS is on the receipt or sales order.

General DCS UDF/Aux

Documents By Item DCS:

DCS	Document Name	File	Print

DCS: 002101 Document Name: ☐ Print With Receipt/SO

Document File:

To add a document to the list:

DCS – Select a DCS from the drop down.

Document Name – Enter a name for the document. This name will be displayed for the cashier and on the Genius device. The Document Name should not exceed 36 characters.

Print With Receipt/SO – If checked, the document, including signature, is printed when the receipt or sales order is printed.

Document File – Enter or browse for the PDF file.

Click the Add button. The document is added to the list.

Note: Documents entered by DCS are always presented for signature when the receipt is updated or sales order saved.

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

Documents Section – UDF/Aux

Documents entered in the UDF/Aux tab are presented for signature when an item with the UDF or Aux setting is on the receipt or sales order.

General | DCS | **UDF/Aux**

Documents By Item UDF/Aux:

UDF/Aux	Setting	Document Name	File	Print

UDF/Aux: **UDF3** Setting: **10190** Document Name: ☐ Print With Receipt/SO

Document File:

To add a document to the list:

UDF/Aux – Select an item UDF or Aux field from the drop down.

Setting – Select a setting for the UDF or Aux.

Document Name – Enter a name for the document. This name will be displayed for the cashier and on the Genius device. The Document Name should not exceed 36 characters.

Print With Receipt/SO – If checked, the document, including signature, is printed when the receipt or sales order is printed.

Document File – Enter or browse for the PDF file.

Click the Add button. The document is added to the list.

Note: Documents entered by UDF/Aux are always presented for signature when the receipt is updated or sales order saved.

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

Document Display Tab

Customer Kiosk - Document Signature/Capture Setup

Configuring a2lgyg.cedevic.io At 192.168.1.24 Assigned To WS 1

General | Document Signature Capture | Document Display | Printers

☐ Display Documents (No Signature Capture)

Accept Caption: Decline Caption:

General | DCS | UDF/Aux

Documents:

Document Name	File	On Update	Print

Document Name: ☐ Display On Update/Save ☐ Print With Receipt/SO

Document File:

☒ Done

In Document Display, documents are displayed on the Genius for the customer with Accept and Decline buttons. No signature is required

Entries on this tab are used to enable Document Display, enter the text that appears on the iPad and enter the documents that will be displayed.

All documents must PDF files.

Display Documents (No Signature Capture) – Check to enable document display.

Accept Button Caption – Accept button caption. Should not exceed 18 characters.

Decline Button Caption – Decline button caption. Should not exceed 18 characters.

Documents Section

The documents that will be presented to the customer are entered in the Documents section. This section is the same as the Documents Section on the Document Signature Capture tab.

Documents can be presented in general or for items with selected DCS or UDF/Aux settings.

Printers Tab

Customer Kiosk - Document Signature/Capture Setup

Configuring a2lgyg.cedevic.io At 192.168.1.24 Assigned To WS 1

General | Document Signature Capture | Document Display | Printers

Document Printers:

WS	Printer
1	
2	

Clear

Printers: EPSON WorkForce 545 Series (redire Set

Done

The Printers tab is used to assign printers for document printing to each workstation.

All workstations are displayed in the grid.

To assign a printer to a workstation, select the workstation, select a printer from the drop down and click the Set button.

To remove an assignment, select the workstation and click the Clear button.

PDF Formatting

The Document Signature Capture plugin displays PDF files on the Genius device.

To accomplish this, the text from the PDF files is reformatted to accommodate the screen size of the Genius.

It is recommended that the PDF text be viewed on the Genius device so that it can be adjusted if needed. This can be done in Setup by using the Genius button.

Operation

A Bill To Customer is required for document signatures. A Bill To Customer is not required for document display.

Document Signature and Display (Receipt On Update/Sales Order Save)

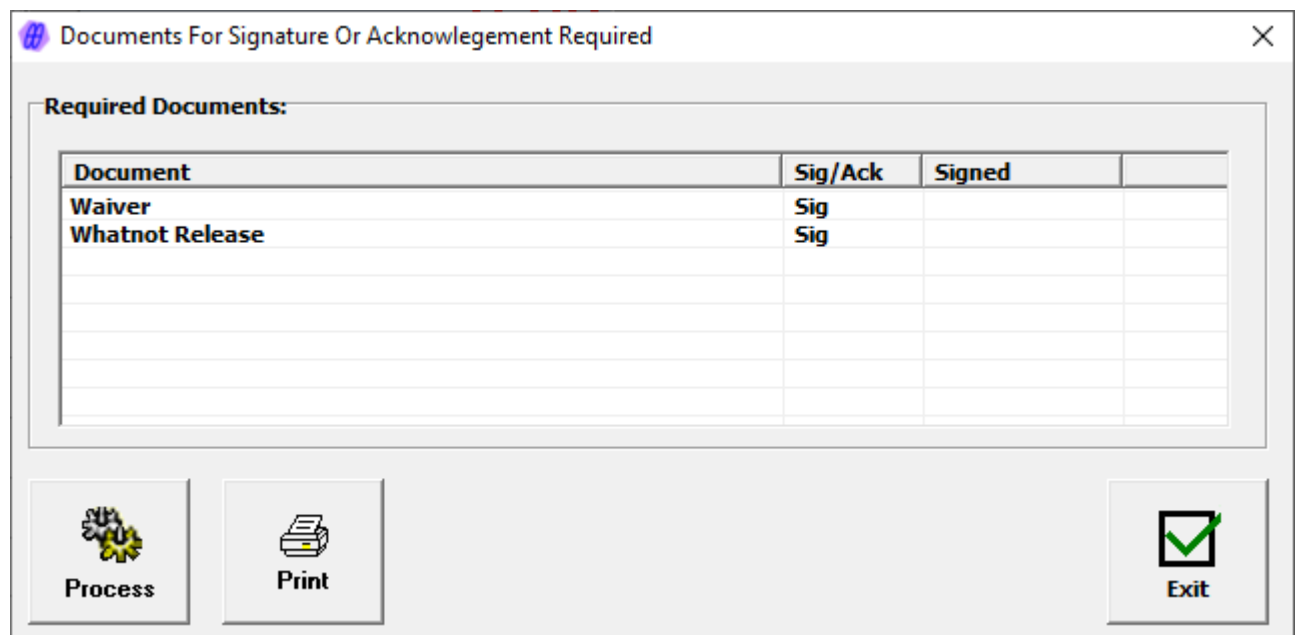
Required Document List

When a receipt is updated or sales order saved, a list is compiled of all documents for signature and display. (For general documents, "Capture Sig On Update/Save" must have been selected in Setup).

The list of required documents is displayed in Retail Pro, however, the "Document Signature" or "Document Display" dialog is immediately displayed over the document list as the first document in the list is displayed on the Genius.

All documents are displayed on the Genius device with Accept/Decline buttons. (The exact captions are entered in Setup).

For documents requiring a signature, the signature capture screen is displayed after the document display.

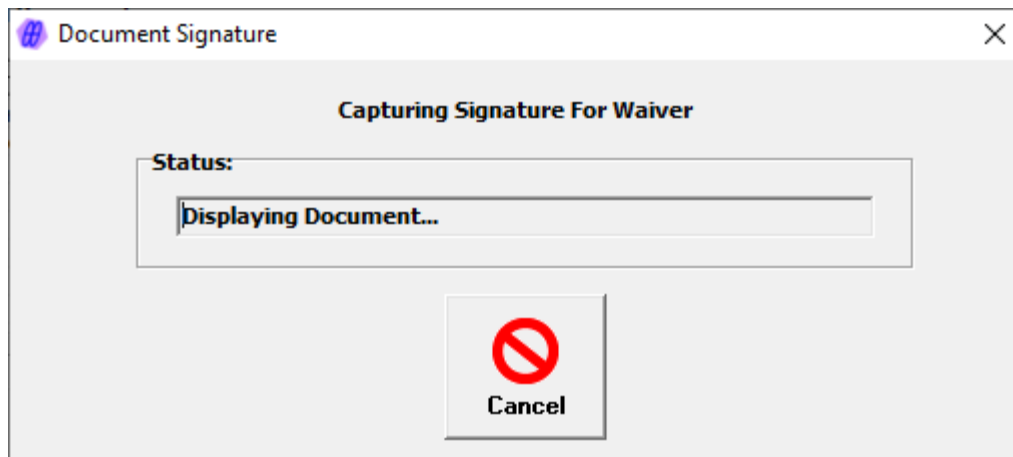


Document	Sig/Ack	Signed
Waiver	Sig	
Whatnot Release	Sig	

Process Print Exit

Document Display

In Retail Pro, the Document Signature or Document Display dialog is displayed:

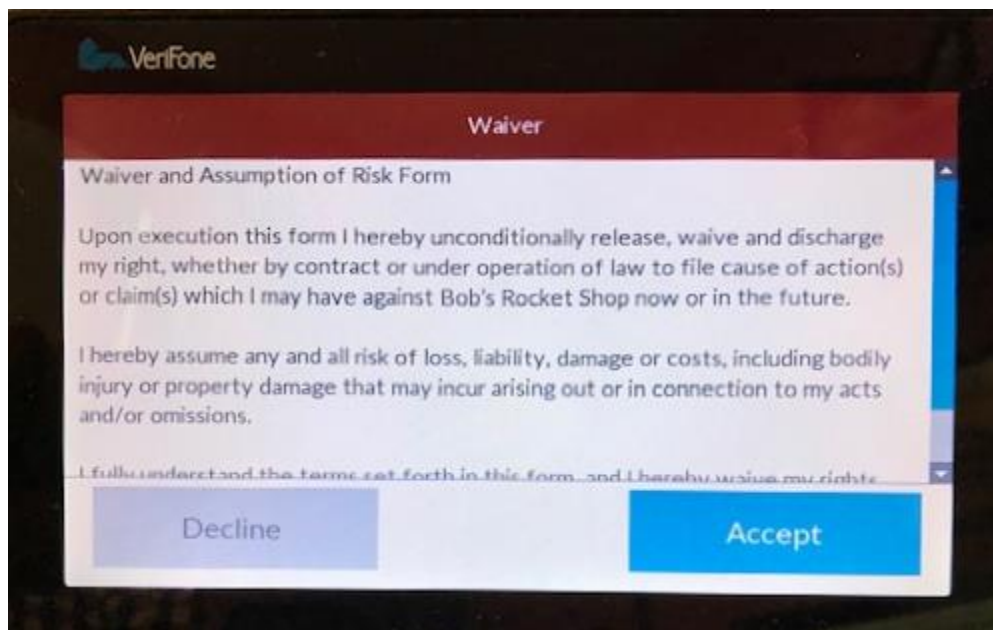


This dialog shows the name of the document.

The dialog is displayed for each document that should be signed or displayed.

The Cancel button can be used to cancel the document display on the Genius.

The document is displayed on the Genius device:



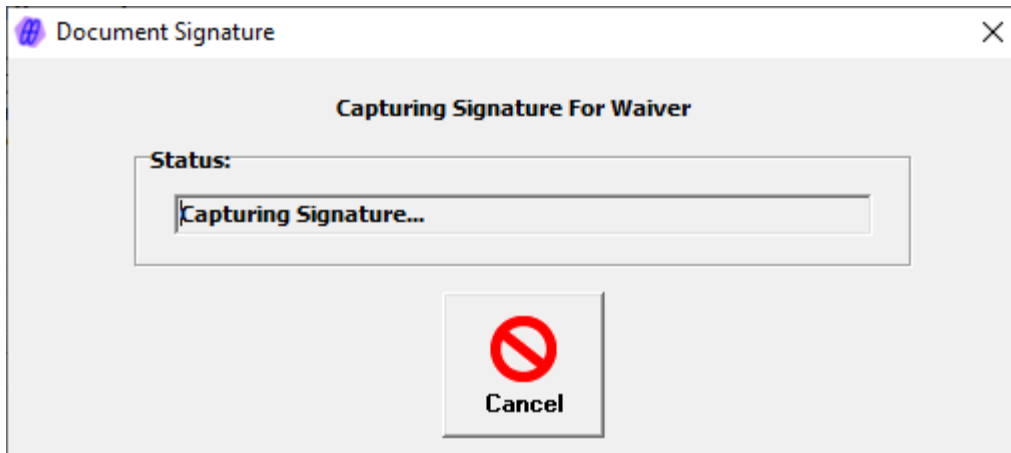
The customer will touch Accept or Decline.

If the customer chooses Decline, the

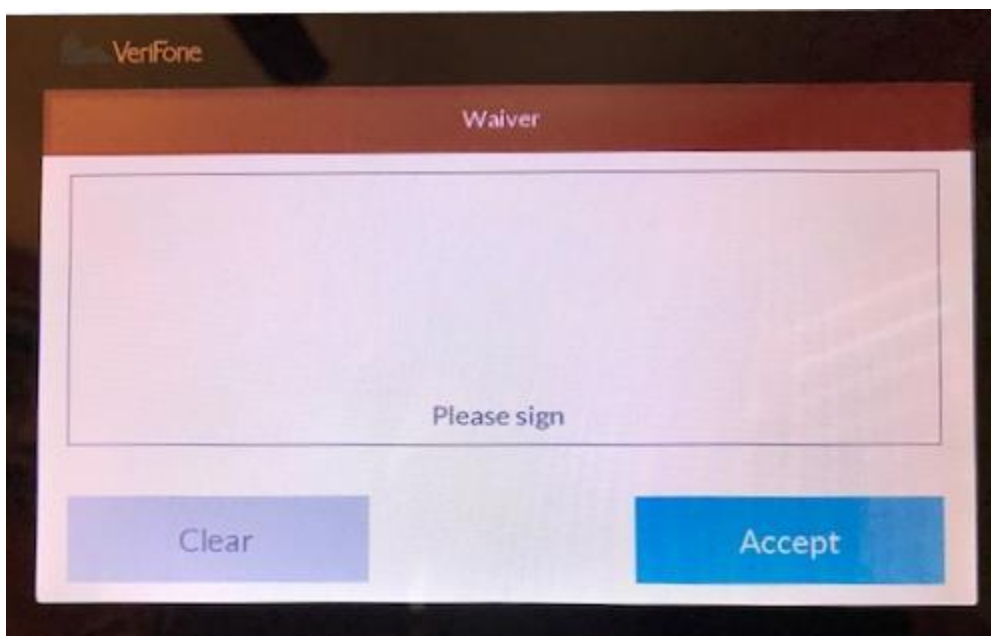
For documents that do not require a signature, the next document in the required documents list is processed.

Signature Capture

For documents that do require a signature, the "Capturing Signature..." status is displayed in Retail Pro:



The Signature Capture screen is displayed on the Genius:



Note: The customer cannot choose to skip the signature. If the customer does not want to sign, close the Signature Capture screen on the Genius device by clicking Cancel on the Document Signature screen in Retail Pro.

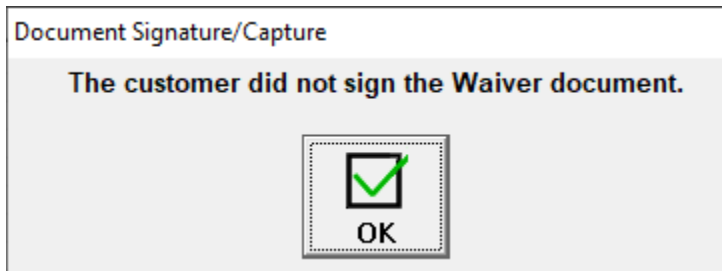
Customer Signs Document

If the customer signs the document and clicks Accept, the document with signature is saved and the next document on the list is presented to the customer.

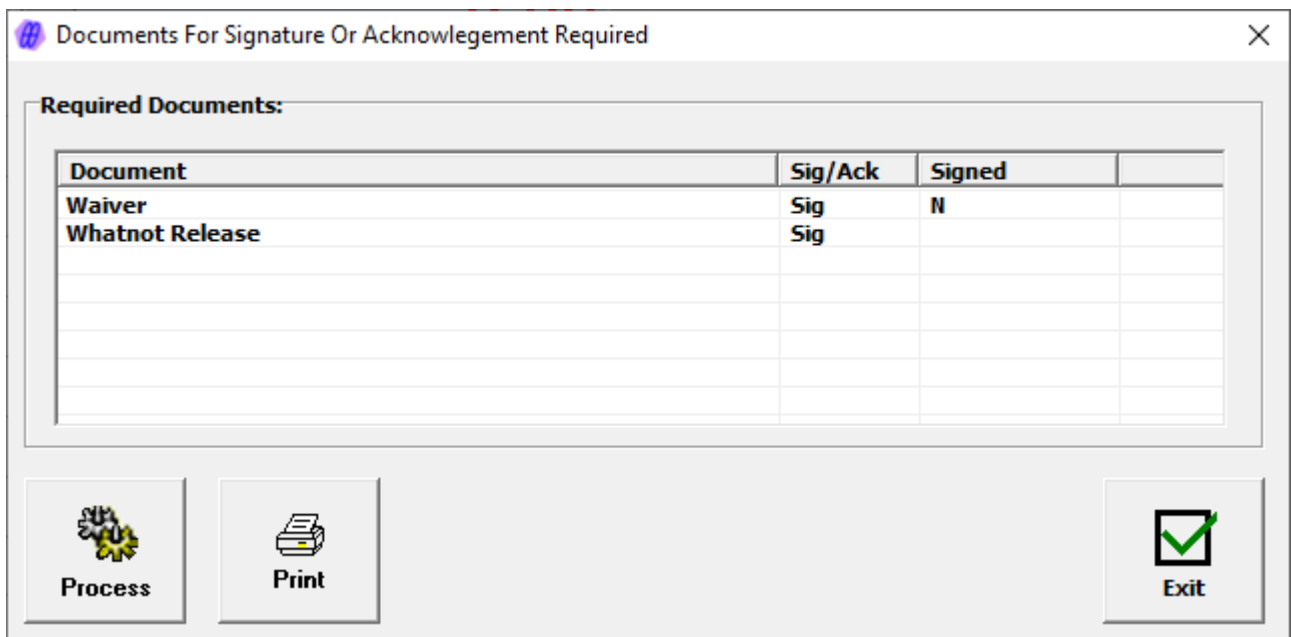
When all documents have been presented, the Required Documents screen is closed and the receipt is updated or the sales order is saved.

Document Is Not Signed

If the document requires a signature and the customer does not accept the document or the document display or signature capture screen on the Genius is closed by the cashier from Retail Pro, a prompt is displayed:



In this case, no other documents will be displayed automatically on the Genius device and the Required Documents list is updated:



The cashier can take the following actions:

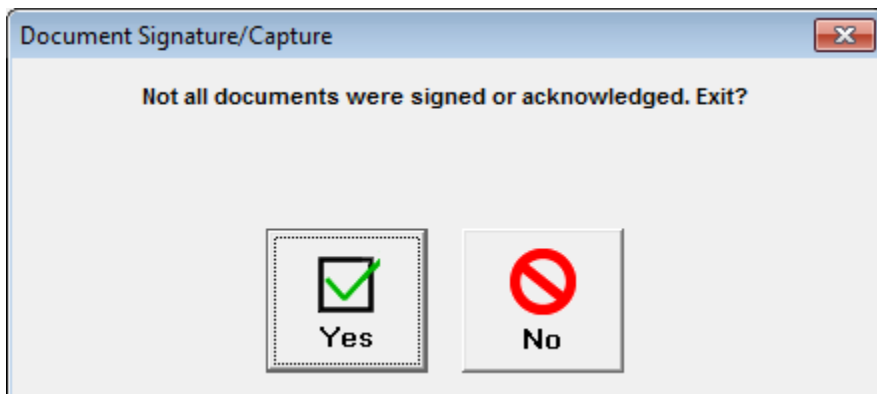
Present the document on the Genius again by selecting it in the list and clicking Process.

Select another document from the list and click Process to present the document on the Genius.

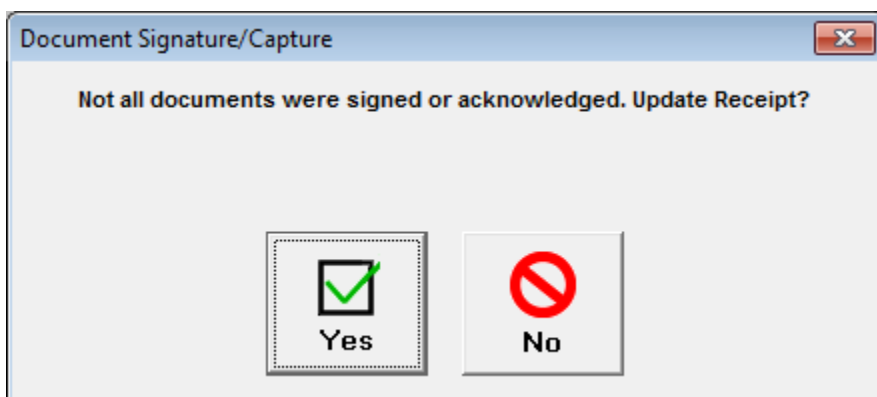
Select a document and click Print. (Documents that are printed will include signatures if signed.)

Click Exit.

When exit is clicked, if a document has not been signed or acknowledged. The cashier is prompted to exit:



The cashier is then prompted to update the receipt or save the sales order:



Document Display

When a document is presented on the iPad for acknowledgement, the customer will see:

The screenshot shows an iPad interface. At the top, the status bar displays '2:27 PM Sat Jul 27' and '28%' battery. Below the status bar, the title 'Important Information' is centered. The main content area is a white rectangle with a black border, containing the following text:

Privacy Notice

This privacy notice discloses the privacy practices for Bob's Rocket Shop.

Information Collection, Use, and Sharing
We are the sole owners of the information collected on our site. We only have access to/collect information that you voluntarily give us via email or other direct contact from you. We will not sell or rent this information to anyone.

We will use your information to respond to you, regarding the reason you contacted us. We will not share your information with any third party outside of our organization, other than as necessary to fulfill your request, e.g. to ship an order.

Unless you ask us not to, we may contact you via email in the future to tell you about specials, new products or services, or changes to this privacy policy.

Your Access to and Control Over Information
You may opt out of any future contacts from us at any time. You can do the following at any time by contacting us via the email address or phone number given below:

(Please Scroll To End)

[Acknowledged](#)

The customer will touch "Acknowledged" to acknowledge the document. The customer cannot "cancel" acknowledgement.

Document Printing On Update Or Save

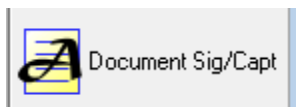
Documents that were marked as "Print with Receipt/SO" in Setup will be printed when the receipt is updated or sales order saved.

Documents that have been signed will include the signature, customer's first and last name and date/time the document was signed.

Document Signature and Display (Initiated By Cashier)

From a receipt or sales order, the cashier can click the "Document Sig/Capt" button on the side menu.

Note that the "Document Sig/Capt" button must be used to present General documents that were not saved with "Capture Sig On Update/Save" or "Display On Update/Save".



When "Document Sig/Capt" is clicked, the Required Documents list will be displayed:

A screenshot of a software window titled "Documents For Signature Or Acknowledgement Required". It contains a table with the following data:

Document	Sig/Ack	Signed/Acked	
Waiver	Sig		
Release	Sig		
Privacy	Ack		

Below the table are three buttons: "Process" (with a gear icon), "Print" (with a printer icon), and "Exit" (with a green checkmark icon).

Documents that required signatures that have already been signed will have a "Y" in the Signed/Acked column.

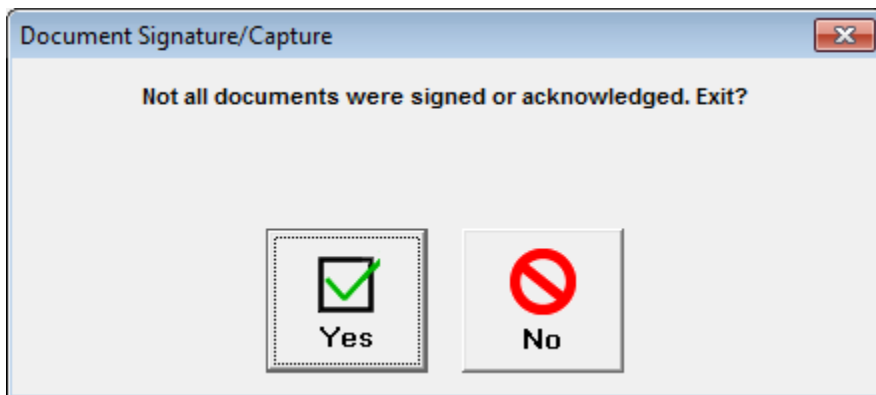
The cashier can take the following actions:

- Select a document from the list and click Process to present the document on the Genius device.

- Select a document and click Print. (Documents that are signed include signatures).

- Click Exit.

When exit is clicked, if a document has not been signed or acknowledged. The cashier is prompted to exit:



Displaying and Printing Documents From Former Receipts

The "Document Sig/Capt" side button can be used from a former receipt to display and print the documents that were required for signature or acknowledgement for that receipt.

In the case of documents that required signature, if the document was signed, the signed copy can be printed from the Required Documents screen.

If the document was not signed, an unsigned copy will be printed.

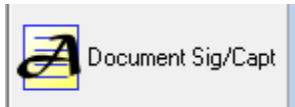
Stores And The HQ System

If Setup has been done correctly, signed documents from stores are transmitted to the HQ System.

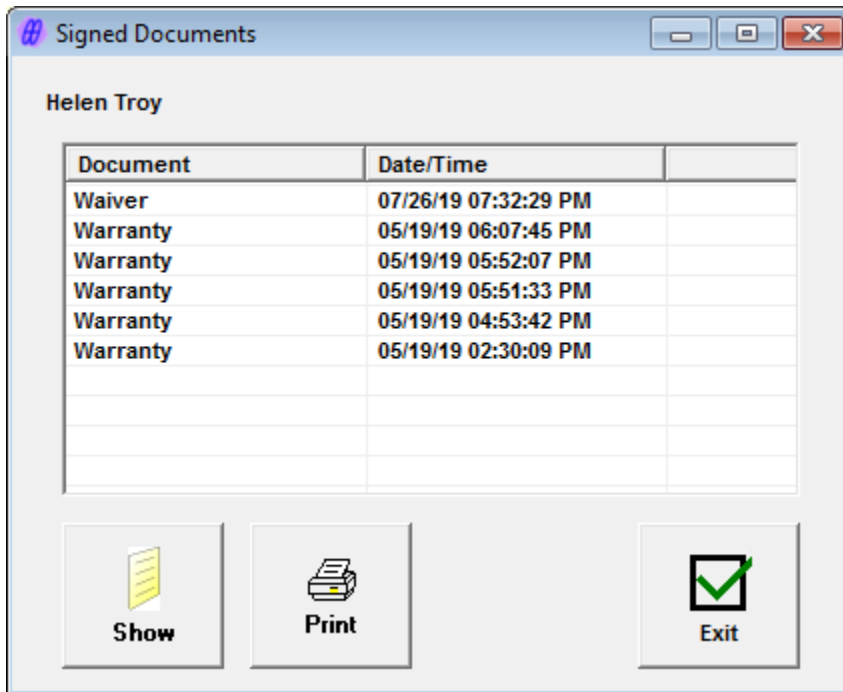
This means that signed documents from receipts and sales orders can also be accessed and printed at the HQ system.

Displaying and Printing Documents From The Customer Screen

Click the "Document Sig/Capt" button from the Customer Form View screen to display the list of all documents that have been signed by the customer:



The Signed Documents screen is displayed:



All documents that have been signed by the customer are displayed on this screen.

The document name and date/time it was signed are shown.

The initial sort order is by date with most recent first. The sort order can be changed to the Document Name by clicking the Document column.

Displaying Documents

To display a document, select it from the list and click the Show button.

Printing Documents

To print a document, select it from the list and click the Print button.

The Printer selection dialog will be displayed.

Using Document Signature Capture To Print Item-Based Documents

It is possible to use the Document Signature Capture plugin to print item-based documents when a receipt or sales order is updated.

This is useful for documents like warranties or customer information.

To print an item-based document, enter the document in the DCS or UDF/Aux tab on the Document Display tab of the Setup screen.

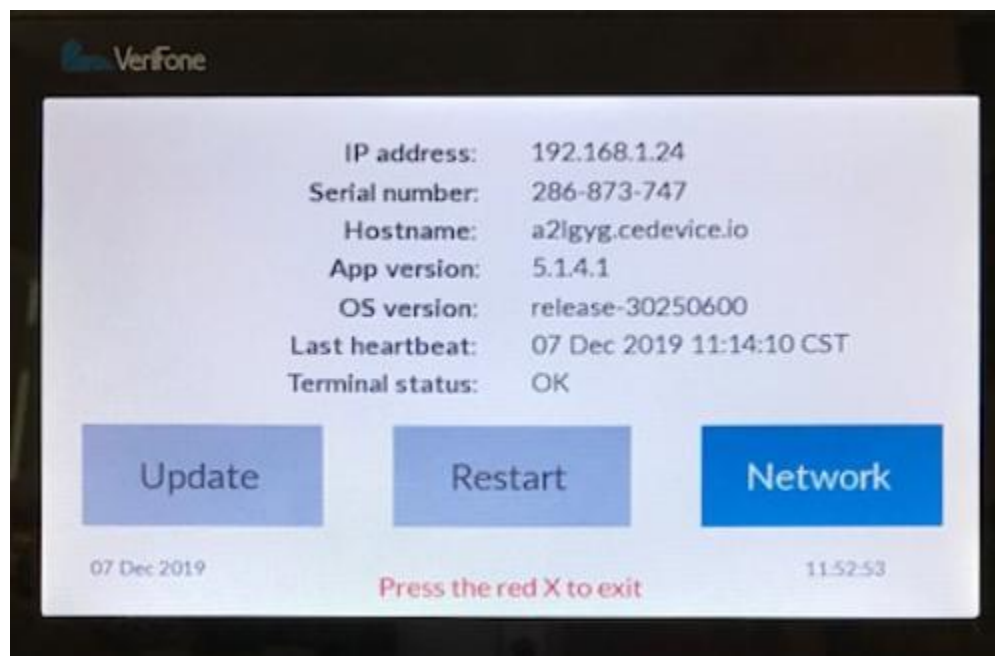
Do NOT check "Display On Update/Save".

Check "Print On Update/Save".

This stops the requirement that the document be acknowledged on update but does print the document when the receipt or sales order is printed.

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

MMCKDocCapture.dll	RetailPro9\plugins
MMCKDocCapture.mnf	RetailPro9\plugins
MMCKDocCaptCapt.bmp	RetailPro9\plugins

DataSvc

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

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

Setup

CK*.ini	RetailPro9\MM\CustKiosk
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Signed Document PDFs

C:\Program Files
(x86)\MMEnterprise\CustKiosk\SignedDocs