Installation and User Manual M&M V9 Customer Information Kiosk – v1.x For Retail Pro® 9-Series v9.3, 9.4 and iPad

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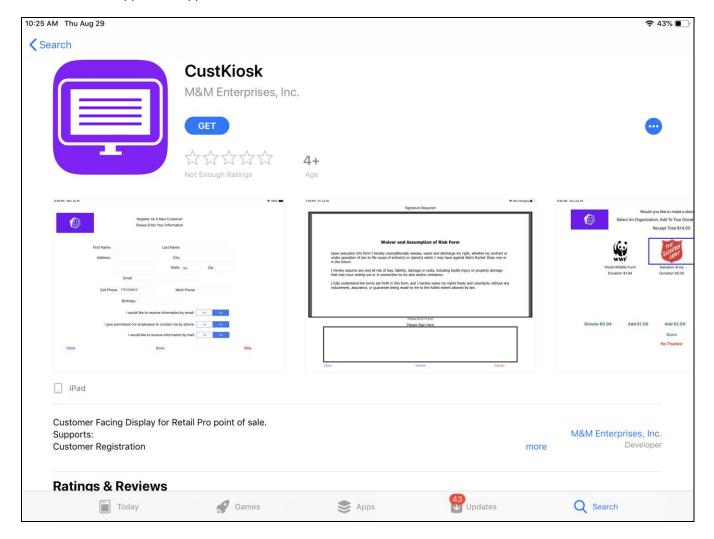
Overview

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

Customer Kiosk App

The Customer Kiosk App is downloaded from the Apple store into the iPad. Search for CustKiosk in the Apple store. The CustKiosk App is free. The single CustKiosk app supports all of M&M's Customer Kiosk plugins.

Customer Kiosk App in the app store:



Customer Kiosk Plugins

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

MMCKRegister – The Customer Registration plugin. Allows customers to sign in at a free-standing kiosk.

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.

MMCKSigCaptue – 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.

The MMCKRegister plugin is different from the others because it operates as a free-standing kiosk (no cashier intervention) and the customer information is available at all Retail Pro workstations. An iPad being used for Customer Registration cannot be used for the other kiosk functions.

The other plugins operate with iPads dedicated to single workstations. However, each of these iPads can run with multiple plugins on the RPro side. For example, a single iPad (assigned to one workstation) can perform all functions except customer registration.

M&M RPro Data Service

The M&M RPro Data Service is a utility program that is installed on the local store's Retail Pro server. It acts as a bridge between the CustKiosk app and Retail Pro.

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:

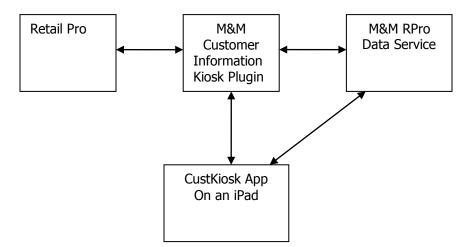
Customer Identification – Customers can identify themselves by entering a phone number or email address. This can be done automatically when a new Receipt is started or initiated by the cashier.

Customer Information Capture – Customers can enter their information directly on the iPad. The information that is captured can include name, address, phone numbers, email address, birthday or date and various opt-in selections. What information is captured is fully configurable.

Customer Information Verification – Once entered, customers can verify and edit their information on subsequent visits.

Configuration Information

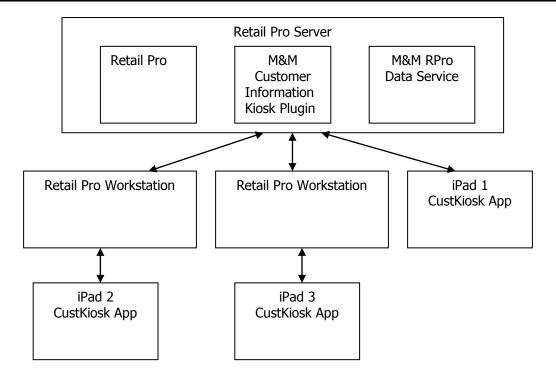
The various software components communicate as follows:



The Customer Information Kiosk plugin communicates with the M&M RPro Data Service and the CuskKiosk App on the iPhone. All communications are done using network connections.

iPads must be on the same local network as the Retail Pro system.

In terms of hardware, the configuration resembles:



Workstations and iPads

Aside from iPads being used for Customer Registration, more than one iPad can be assigned to a single workstation. However, an iPad cannot be assigned to multiple workstations.

Licensing

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

For example, if the Customer Information Kiosk plugin is licensed for 4 iPads then up to 4 iPads 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 MMCKCustInfo-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:

MMCKCustInfo.dll – Customer Information Kiosk Plugin.

MMCKCustInfo.mnf - Required manifest file.

MMCKCustInfoCapt.bmp - Required bitmap.

MMCKCustInfoIdent.bmp - Required bitmap.

MMCKCustInfoVer.bmp – Required bitmap.

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

Installation

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

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.

When installing the Data Service on the HQ system where there are other Retail Pro systems running at stores, the data service must be available from the Internet. This may require opening the data service port on a router.

Customer Kiosk App

From any iPad, go to the App Store and install the CustKiosk app.

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.

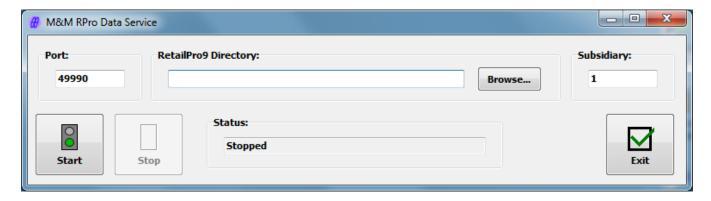
Setup

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

- 1) Start the M&M RPro Data Service.
- 2) Do Setup in the Customer Information Kiosk.
- 3) Set parameters in the Customer Kiosk app on the iPad.
- 4) Load the Customer Kiosk Setup on the iPad.

Start The M&M RPro Data Service

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.

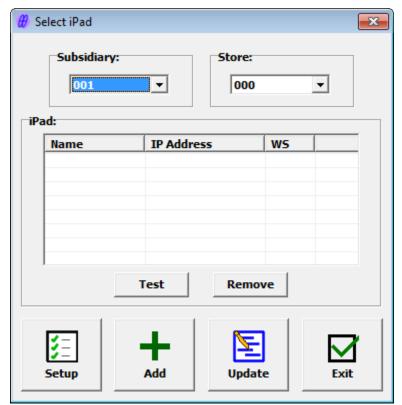
Customer Information Kiosk Plugin (Retail Pro) Setup

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" entry.

The Select iPad screen is displayed:



This screen is used to select an iPad for Setup.

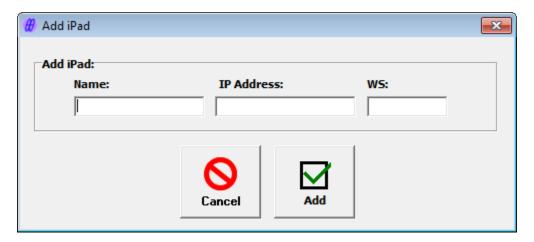
It is also used to assign iPads to workstations or remove iPad assignments.

Select the Subsidiary and Store.

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

Adding an iPad

To add an iPad, click the Add button. The Add iPad screen is displayed:



Enter the name of the iPad. Any name can be entered as long as it is unique. See Appendix A for information on how to find the name assigned in the iPad itself.

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

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

Click the Add button.

(Cancel can be used to exit without adding the iPad.)

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

"iPad Name has been used." – The name has already been used. Names must be unique.

"IP Address is already assigned." – The IP Address is assigned to another iPad.

"An iPad is already assigned to the Workstation." – Another iPad for the plugin is assigned to the workstation.

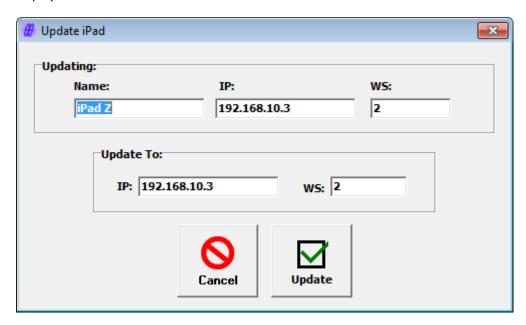
"The user has allocated all their devices." – Adding this iPad would exceed the maximum number of devices in the end user's license.

"The iPad is assigned for Customer Registration and cannot be assigned to other Customer Kiosk plugins." – The iPad is operating as a Customer Registration Kiosk. The iPad cannot be assigned to other plugins.

Aside from Customer Registration, the iPad can be assigned to other Customer Kiosk plugins in addition to the Customer Information plugin.

Updating an iPad

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



Enter the new IP Address and/or Workstation and click Update.

Removing an iPad

To remove an iPad from the list, select it and click the Remove button. The iPad is removed from the list.

When an iPad is removed, the license allocation is released. The Customer Kiosk app on the iPad will not operate.

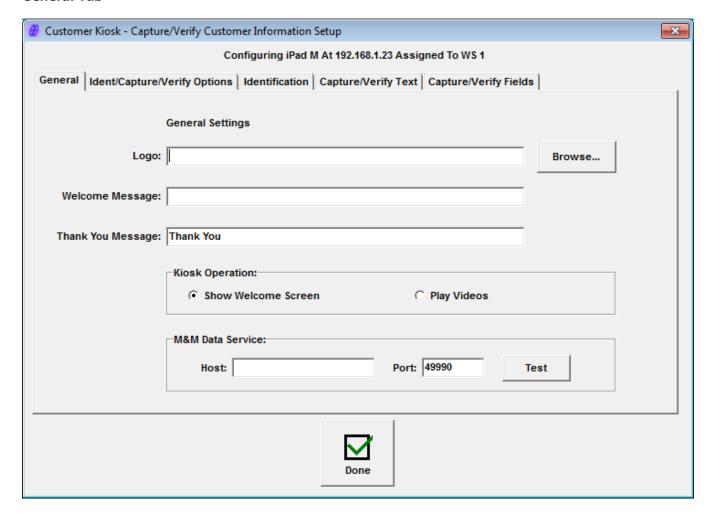
The Test Button

If the CustKiosk app is running on the iPad, the Test button can be used to test the connection to the iPad.

Setup

Select an iPad from the list and click the Setup button. The Capture/Verify Customer Information Setup screen is displayed. There are five tabs on the Setup screen: General, Ident/Capture/Verify Options, Identification, Capture/Verify Text, Capture/Verify Fields.

General Tab



If the iPad is assigned to other Customer Kiosk plugins, the General information may already be entered.

Logo – Enter or browse for an image file. Entering an image file is optional. If entered, the image is displayed on most of the CustKiosk screens on the iPad. Most image fiel formats are supported (jpg, gif, png).

Welcome Message – When the CustKiosk is operating in Welcome mode, this is the text of the Welcome message displayed on the Welcome screen.

Thank You Message – Text for a "Thank You" message.

Kiosk Operation – For plugins other than Customer Registration, the CustKiosk app can display a welcome screen or play videos between plugin operations. (Videos must be loaded onto the iPad and in a format that can be presented on the iPad).

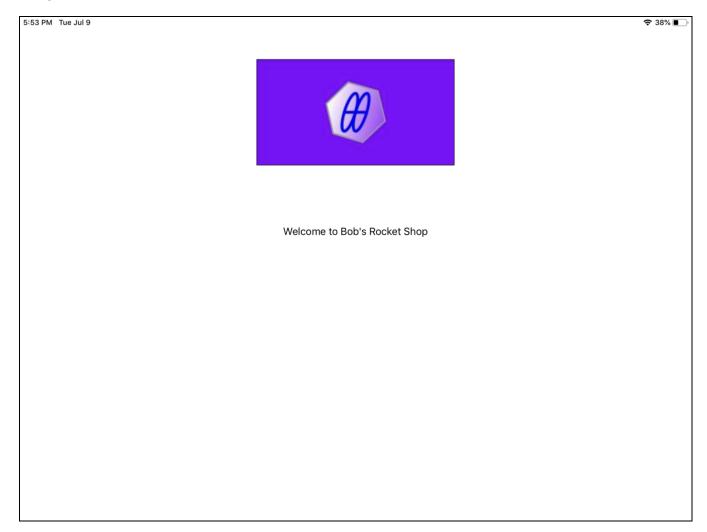
M&M Data Service

Host – Enter the Host (IP Address) of the system running the M&M RPro Data Service.

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.

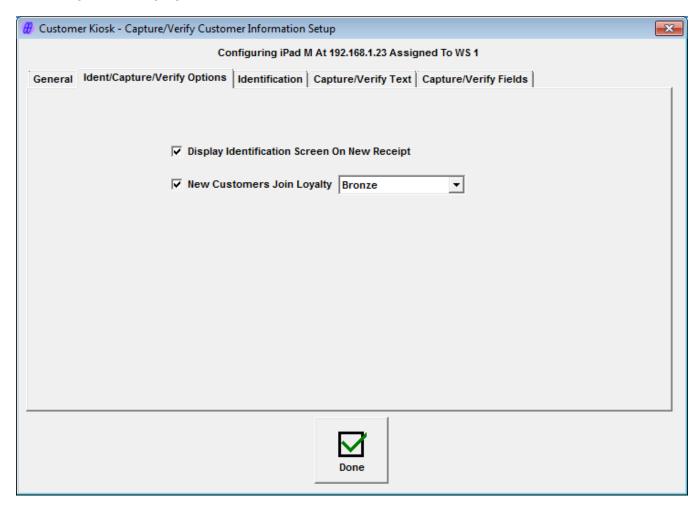
Test – Click the Test button to test the connection to the data service. The data service must be running for the test to be successful.

Sample iPad Welcome Screen



Logo and Welcome Message are shown.

Ident/Capture/Verify Options Tab



Entries on this tab determine the behavior of the Identification, Capture and Verify screens on the iPad as events occur in Retail Pro.

The Identification screen, Capture screen and Verification screen can each be displayed at any time using side menu buttons in Retail Pro.

The options on this tab of the Setup screen enable additional behaviors that can guide the cashier in capturing and verifying customer information.

Display Identification Screen On New Receipt – If checked, the Customer Identification screen is displayed on the iPad 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 iPad.

In addition, if, as a result of the Identification process, the customer is not found in Retail Pro, the cashier is prompted to display Customer Information Capture screen on the iPad. The sequence would be:

Identification screen is displayed on the iPad.

The customer enters a phone number or email address.

The customer is identifed as a new customer.

The cashier is prompted (Yes/No) to display the Customer Information Capture screen on the iPad.

The cashier responds with Yes.

The Customer Information Capture screen is displayed on the iPad.

The customer enters the additional customer information.

The customer is saved and optionally enrolled in a loyalty program.

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

And if, as a result of the Identification process, the customer is found in Retail Pro, the cashier is prompted to display the Customer Verification Capture screen on the iPad. The sequence would be:

Identification screen is displayed on the iPad.

The customer enters a phone number or email address.

The customer is identified as an existing customer.

The cashier is prompted (Yes/No) to display the Customer Information Verification screen on the iPad.

The cashier responds with Yes.

The Customer Information Verification screen is displayed on the iPad.

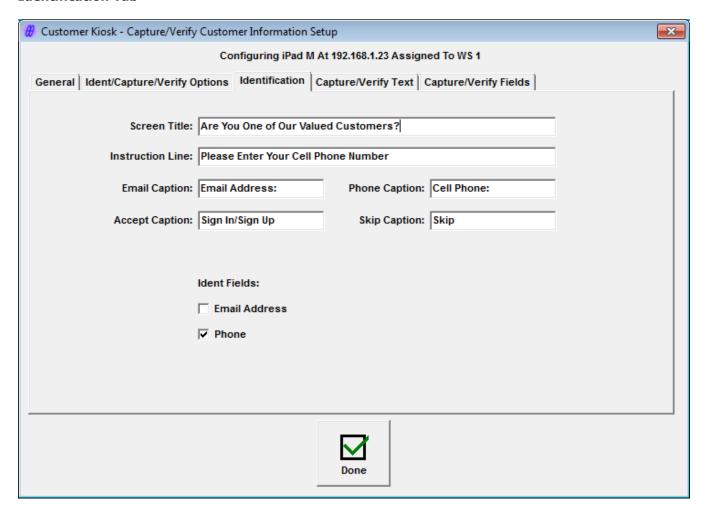
The customer enters the additional customer information.

The customer is saved and optionally enrolled in a loyalty program.

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

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

Identification Tab



Text and options for the Identification screen are entered on this tab. Sample entries are shown.

The purpose of the identification screen is to rapidly determine if this is a new or returning customer based on one or two pieces of information: a phone number and/or email address.

Screen Title – Title displayed on the Identification screen.

Instruction Line – A line of text displayed under the title.

Email Caption – Caption for the field where the customer enters their email address.

Phone Caption – Caption for the field where the customer enters their phone number.

Accept Caption – Caption for a button indicating the email and/or phone has been entered.

Skip Caption – Caption for a button indicating the customer does not want to enter the information.

Note: If Accept is used for a customer not in Retail Pro, they are treated as new customers.

Ident Fields

Check Email Address to use email address as an identification field.

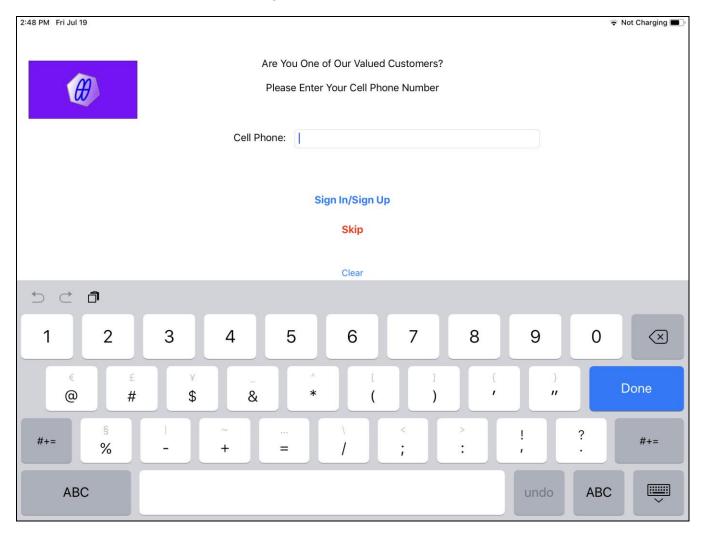
Check Phone to use a phone number as an identification field.

Either or both fields can be checked.

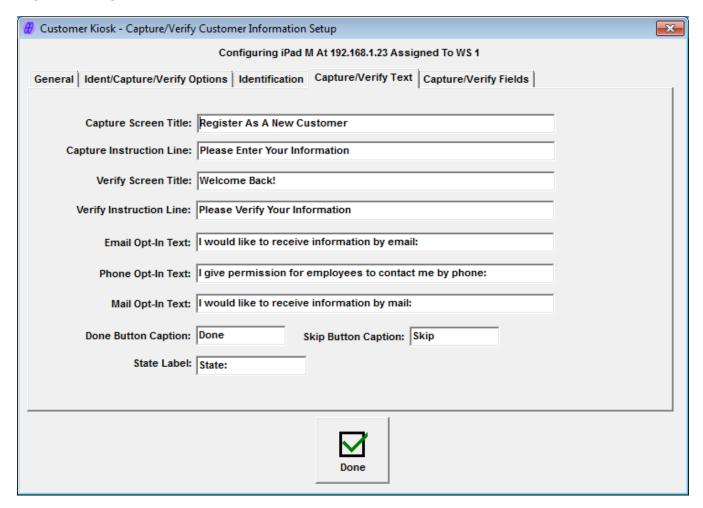
TIP: The instruction text should be compatible with the identification field choices.

Sample iPad Customer Identification Screen

This iPad screen shot is based on the settings shown above:



Capture/Verify Text Tab



Text and options for the Capture and Verify screen are entered on this tab. Sample entries are shown.

Capture Screen Title – The first line shown on the Customer Information Capture screen.

Capture Instruction Line – The second line shown on the Customer Information Capture screen.

Verify Screen Title – The first line shown on the Customer Information Verification screen.

Verify Instruction Line – The second line shown on the Customer Information Verification screen.

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

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

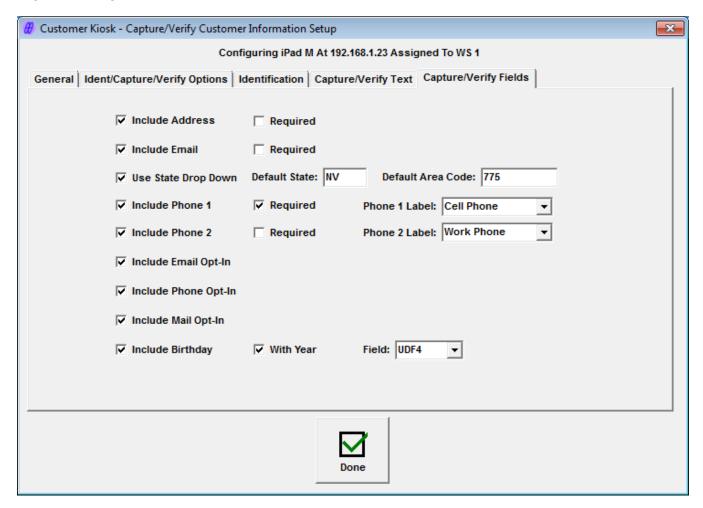
Mail Opt-In Text – Text for the mail opt-in line.

Done Button Caption – Caption for the button indicating the customer has completed entering or reviewing the customer information.

Skip Button Caption – Caption for the button indicating the customer does not want to enter or verify the information.

State Label - Label text for the State entry box.

Capture/Verify Fields Tab



This tab is used to determine which customer fields are displayed and required on the Customer Information Capture and Verify screens. The same fields will appear on both of these screens.

A "Required" checkbox is included for some fields. If checked, it means the field is required.

Include Address – Two address lines plus city, state and zip code. The label for state can be changed.

Include Email – Email address.

Use State Drop Down – If checked, a "picker" control is displayed for selection of the state. (Only US states are included). If not checked, the "State" field is a normal text entry field.

Default State – The default state to show when displaying the customer information capture form. (Optional).

Default Area Code - The default area code for phone numbers without an area code. (Optional but recommended).

Include Phone1 and Include Phone2 - Refer to the Retail Pro Customer Phone1 and Phone2 fields.

Phone1 Label and Phone2 Label – The captions attached to the Phone fields. Choices are Home Phone, Work Phone and Cell Phone.

Include Email Opt-In, Include Phone Opt-In and Include Mail Opt-In – If checked, the corresponding opt-in message and Yes/No control is displayed on the iPad.

Include Birthday – If checked, the customer's birthday (month and day only) are captured.

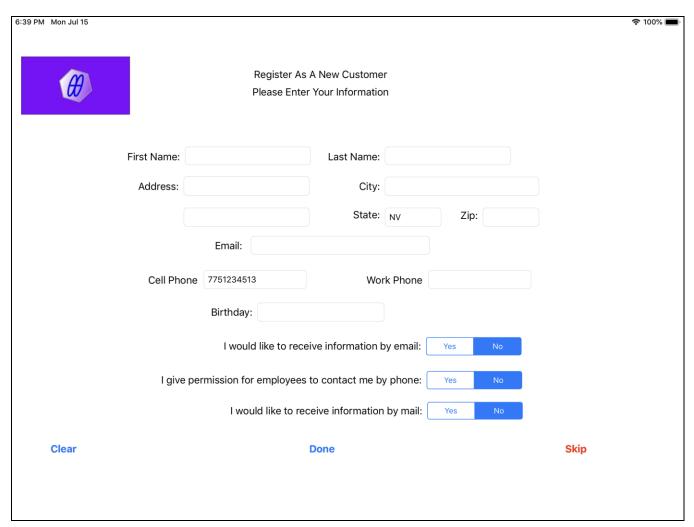
With Year – If checked, then the customer's full birth date (month, day and year) are captured.

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.

Note: On the iPad screen, the birthday or date is captured using a "date picker" control.

Sample Customer Information Capture Screen

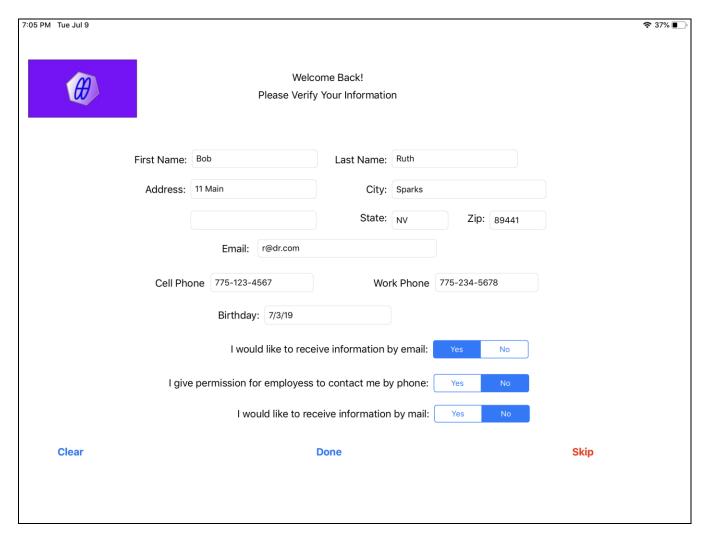
Here is a sample screen shot of the Customer information Capture screen from the iPad. This sample is using the settings shown above:



Note the cell phone entered in the Identification screen is carried over to the Capture screen. This would also be the case for the email address.

Sample Customer Information Verification Screen

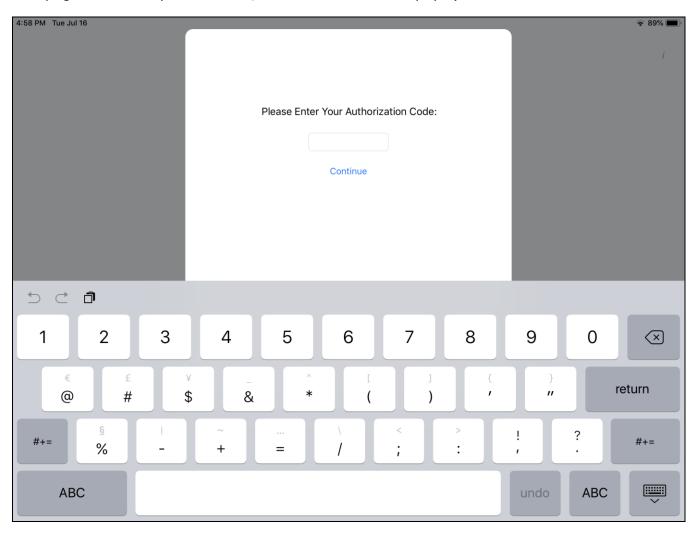
Here is a sample screen shot of the Customer information Verification screen from the iPad. This screen would be displayed so the customer can verify (and edit) their information on the iPad. This sample is using the settings shown above:



Customer Kiosk App (iPad) Setup

Initial App Setup

When the App is started for the first time, the Authorization screen is displayed. (Note that if other customer kiosk plugins have already been installed, the Main screen will be displayed).



The purpose of the Authorization screen is to prevent customers from terminating the app or viewing screens they do not need to see.

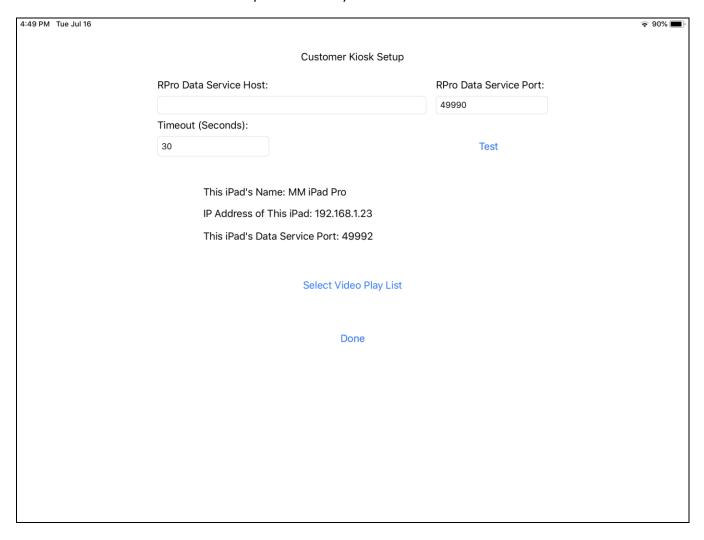
Enter 999999 (six nines) and touch Continue.

The Customer Kiosk Setup screen will be displayed.

If Setup has already been done, the Customer Kiosk App Main screen is displayed. In this case, use "Load Setup From Retail Pro" before running the kiosk.

Customer Kiosk App Setup Screen

The Setup screen in the App is primarily used to enter the information needed for the kiosk to communicate with the M&M Data RPro Service and to set up the Video Playlist.



Enter the IP Address of the system running the M&M RPro Data Service.

Ideally the M&M RPro Data Service should be installed and running and the Customer Kiosk Customer Information Plugin setup should be completed in Retail Pro prior to continuing.

The Test button can be used to Test the connection to the M&M RPro Data Service.

This screen also displays the device name and IP address of the iPad.

Select Video Play List

When the kiosk is operating in Play Videos mode (as selected in Setup on the Retail Pro side), the video play list must be entered.

Touch Select Video Play List.

The Select Video Play List screen will be displayed:

M & M Enterprises, Inc.

| 10:51 AM Fri Jul 19 | | | Not Charging | |
|------------------------|----------|-------------------|--------------|--|
| Select Video Play List | | | | |
| Available Local Videos | | Video Playlist | | |
| Hindustan | | | | |
| Thunderhill1 | | | | |
| WhatDo | Select > | | | |
| | < Remove | | | |
| | | | | |
| | | | | |
| | | | | |
| | | Move Up Move Down | | |
| | | | | |
| | Done | | | |
| | | | | |
| | | | | |

Videos must be in the local video library. Videos can be loaded uses iTunes or other methods. Instructions for loading videos are beyond the scope of this document.

All local videos appear in the left-hand list. To add a video to the play list, select the video and touch the Select button. The video will be moved to the Video Playlist.

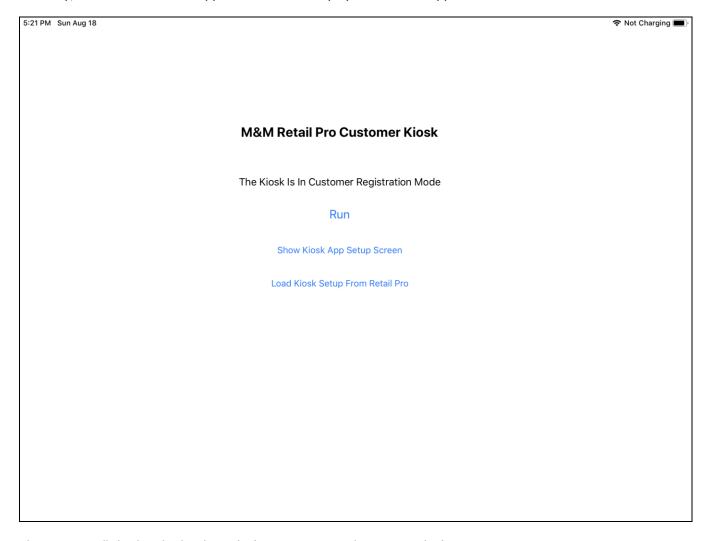
To remove a video from the playlist, touch the video and then the Remove button.

To change the position of a video on the list, select the video and then use the Move Up and Move Down buttons.

Touch Done to return to the Customer Kiosk Setup screen.

Kiosk App Main Screen

Normally, the Customer Kiosk App Main screen is displayed when the app is started:



This screen will display the kiosk mode (Registration, Welcome or Video).

Touch "Show Kiosk App Setup Screen" to display the Customer Kiosk Setup screen.

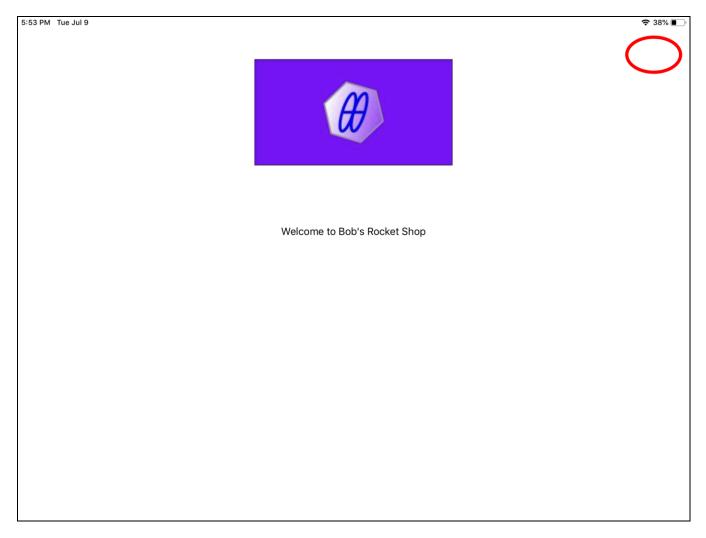
Touch "Load Kiosk Setup From Retail Pro" to load the Setup information that was entered in a Customer Kiosk plugin on the Retail Pro side.

Touch "Run" to start the kiosk in Registration, Welcome or Video mode.

Kiosk App Welcome or Video Screen

Once the kiosk is running and displaying the Welcome or Video screen, it may be necessary to return to the Main screen. (For example, to load a new Setup).

To do this, touch the top right corner of the Welcome or Video screen:



This will display the Enter Authorization Code screen. Enter 999999 and the Main screen will be displayed.

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

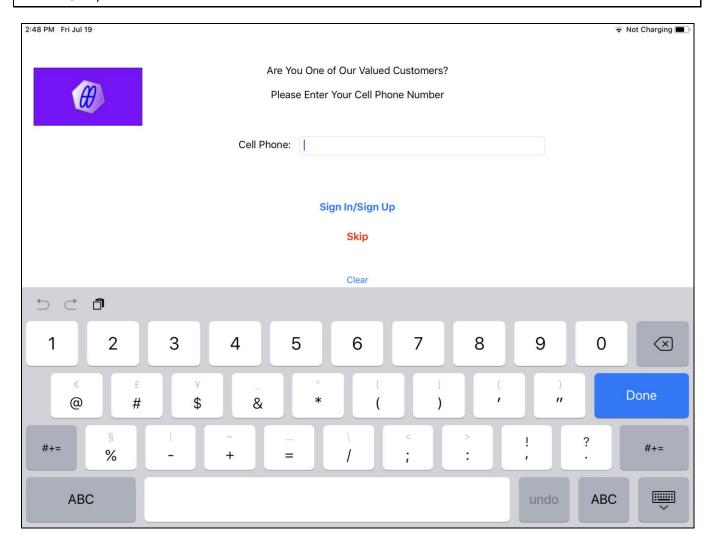
In Retail Pro, the Customer Identification screen will be displayed:



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

On The iPad

On the iPad, the Customer Identification screen is displayed:



Identification Actions

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

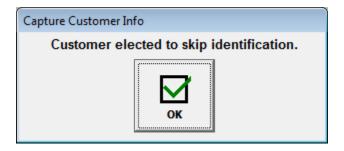
Cashier Clicks Cancel

The cashier can click Cancel on the Customer Identifaction screen in Retail Pro. This will close the screen on the iPad and it will return to the Welcome screen or playing videos.

Customer Touches "Skip" on iPad

The customer can touch the "Skip" (caption is from Setup) button on the iPad. This closes the Customer Identification screen on the iPad. The iPad will return to the Welcome screen or playing videos.

In Retail Pro, the cashier will see:



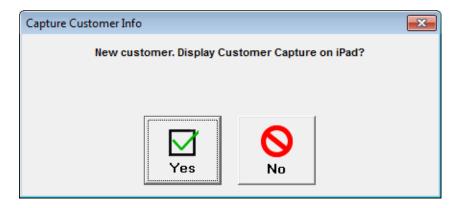
When OK is clicked, control returns to the receipt screen.

Customer Touches "Sign In/Sign Up" on iPad

The customer can enter identification information and touch the "Sign In/Sign Up" (caption is from Setup) button on the iPad. This closes the Customer Identification screen on the iPad. The iPad will return to the Welcome screen or playing videos.

In Retail Pro, the cashier will see one of two screens:

If the customer is not found in Retail Pro, the New Customer prompt is displayed:



Click Yes to display the Customer Information Capture screen on the iPad.

Click No to return to the receipt.

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



Click Yes to display the Customer Information Verification screen on the iPad.

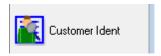
Click No to return to the receipt.

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 iPad:



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 the iPad by clicking the Capture Cust Info button on the receipt or sales order side menu:



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

Manual Customer Verification (Receipt and Sales Order)

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



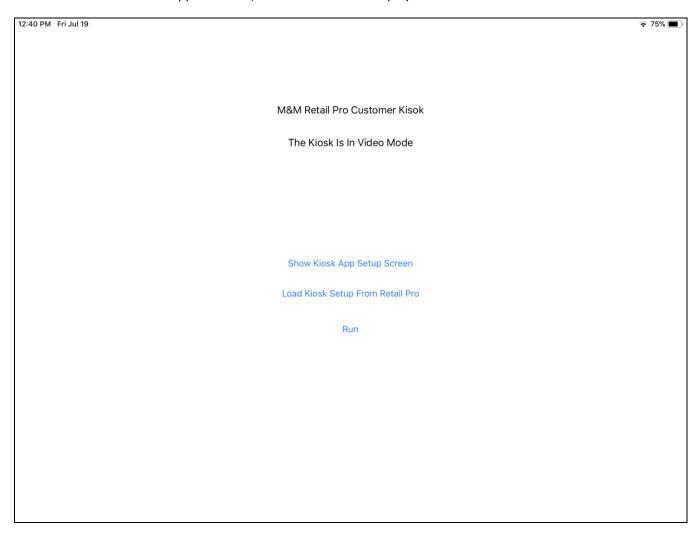
This button is active if there is a Bill To Customer on the receipt or sales order. The Bill To Customer information is verified.

Appendix A - iPad Information

To find the name and IOP address of the iPad, use the Customer Kiosk App or iPad Settings.

Customer Kiosk App Main Screen

When the Customer Kiosk App is started, the main screen is displayed:



Touch "Show Kiosk App Setup Screen" to display the Setup screen:

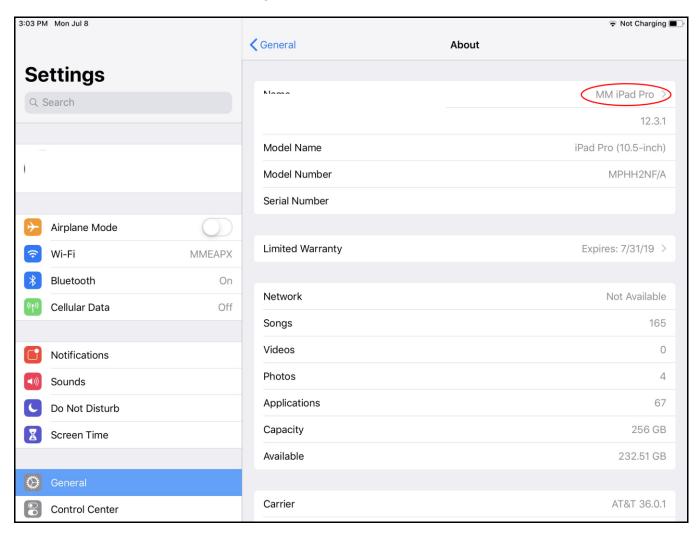
Customer Kiosk App Setup Screen



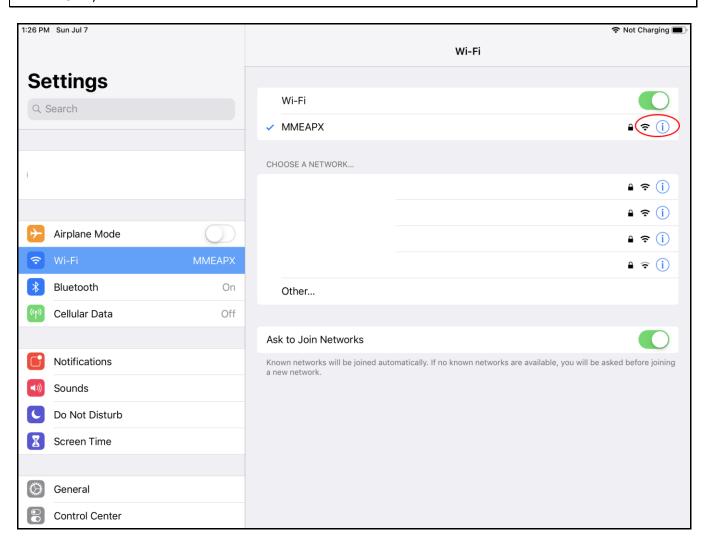
The iPad's name and IP address are displayed on this screen.

iPad Settings

The iPad name can be found on the Settings>General screen.

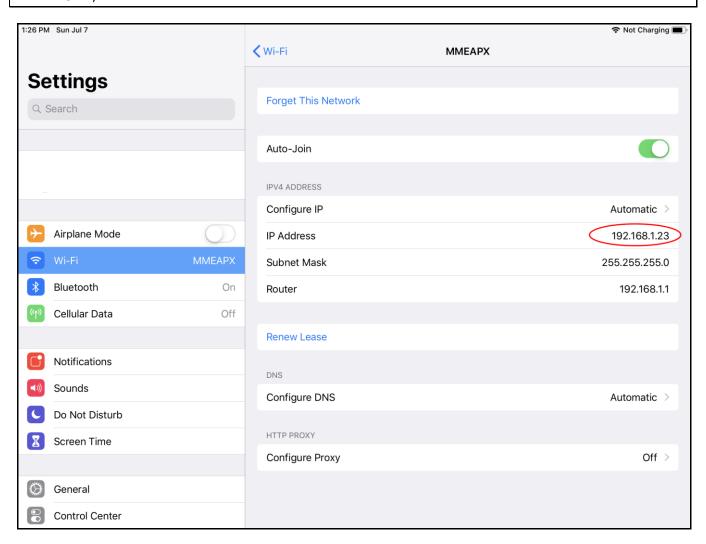


To find the IPAddress, touch Wi-Fi:



And then touch the "i" next to the Wifi network.

The IP Address will be shown:



Appendix B – File Locations

Plugin

MMCKCustInfo.dll RetailPro9\plugins
MMCKCustInfo.mnf RetailPro9\plugins
MMCKCustInfoCapt.bmp RetailPro9\plugins
MMCKCustInfoIdent.bmp RetailPro9\plugins
MMCKCustInfoVer.bmp RetailPro9\plugins

DataSvc

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 RetailPro9\MM\CustKiosk