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

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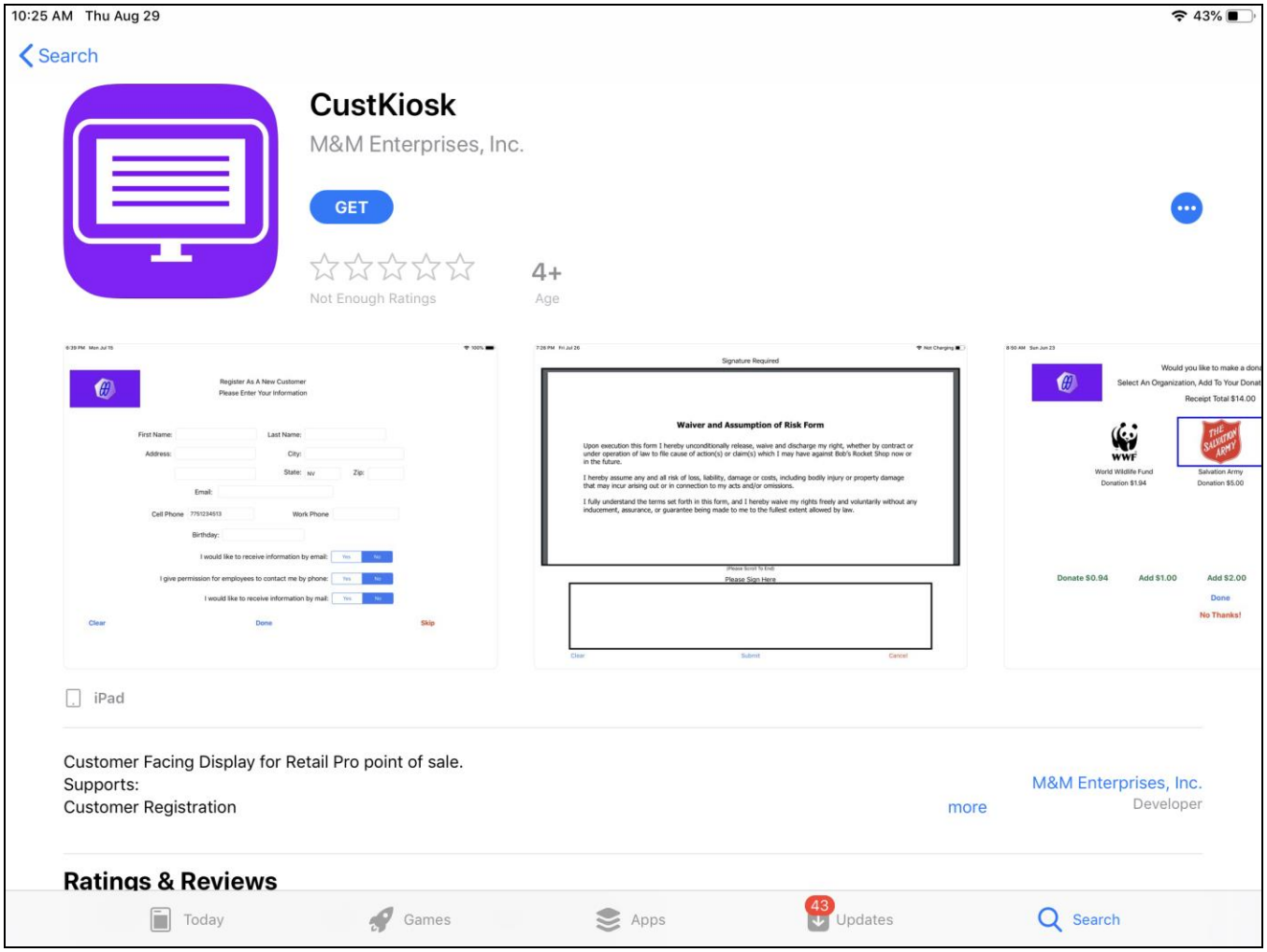
Overview

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

Customer Kiosk App

The Customer Kiosk App is downloaded from the Apple store into the iPad. Look 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.

Document Signature Capture Plugin

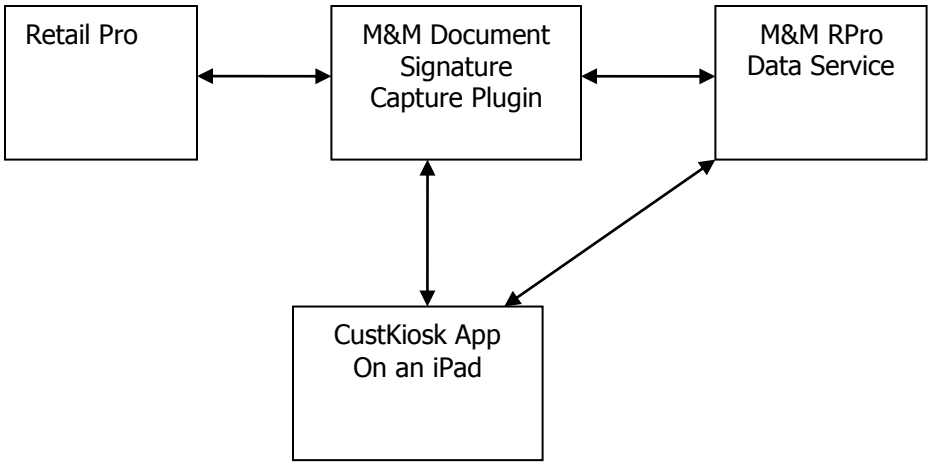
The Document Signature Capture Plugin is a Retail Pro plugin that is installed on the local store Retail Pro system. It provides the Document Signature Capture functionality:

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

Document Display – Display documents on the iPad.

Configuration Information

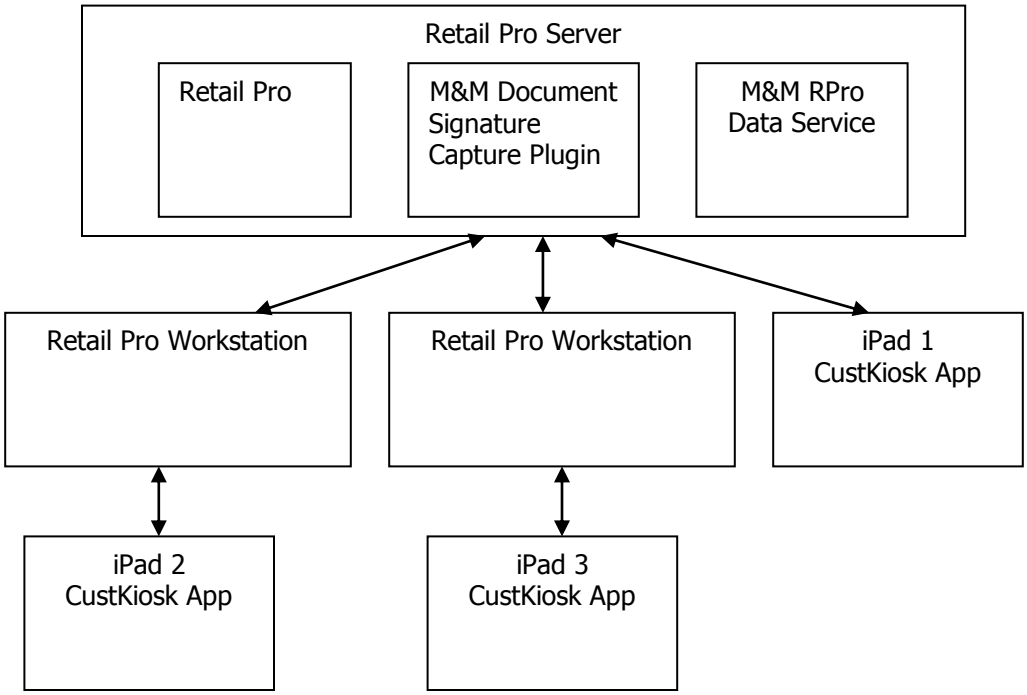
The various software components communicate as follows:



The Document Signature Capture 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 Document Signature Capture plugin is licensed for 4 iPads then up to 4 iPads can be assigned to workstations at any stores for Document Signature Capture.

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

Installation

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

CKDocCaptureInstaller-vx.x.exe – CK Document Capture Installer
MM Document Capture Kiosk.pdf – This manual.
Additional files for reference:

- MMCKDocCapture.dll – Customer Document Capture Kiosk Plugin.
- MMCKDocCapture.mnf – Required manifest file.
- MMCKDocCaptCapt.bmp – Required bitmap.
- CustKiosk.mdb – Required file.
- MMRProDataSvc.exe – M&M RPro Data Service utility.

Installation

Extract and run the CKDocCaptureInstaller-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 "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.

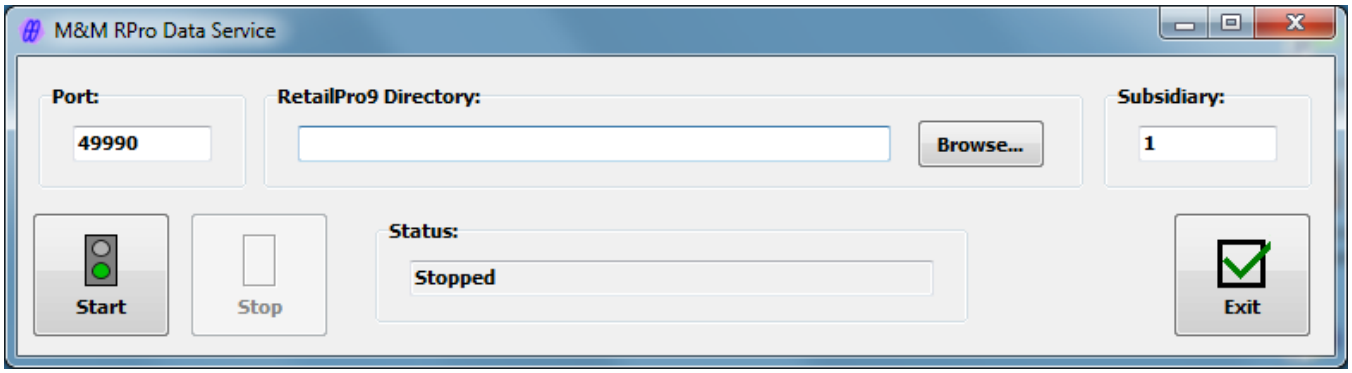
Setup

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.
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:



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.

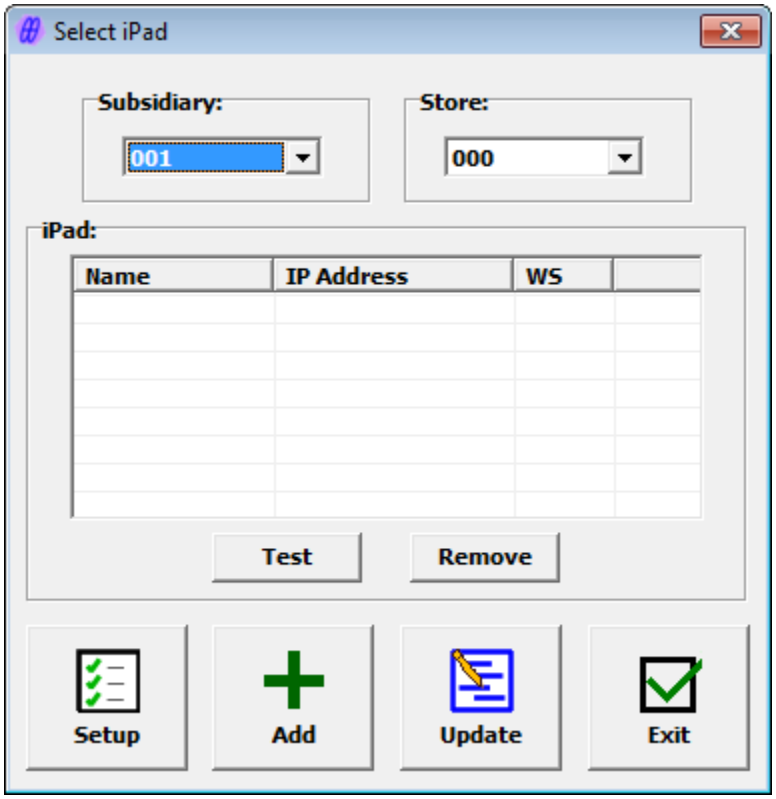
Document Signature Capture Kiosk Plugin (Retail Pro) Setup

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" entry.

The Select iPad screen is displayed:



This screen is used to select an iPad for Setup.

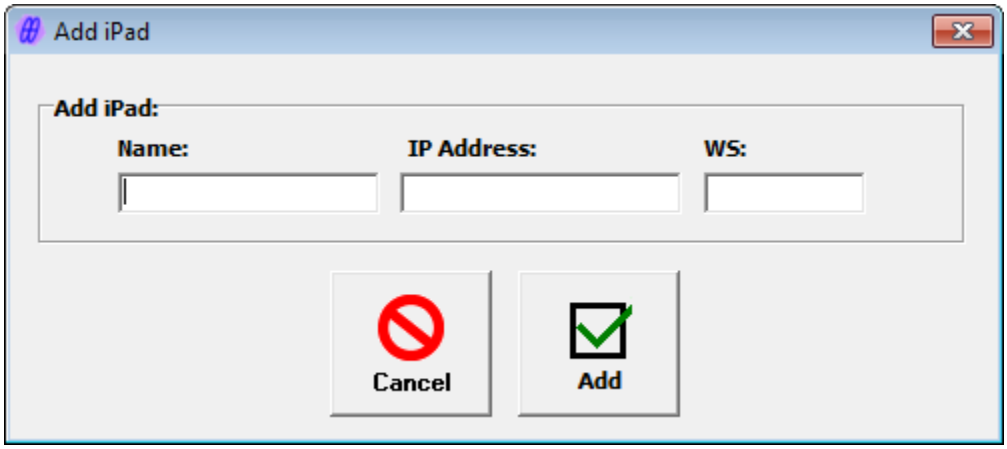
It is also used to assign iPads to workstations or remove iPad assignments.

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.)

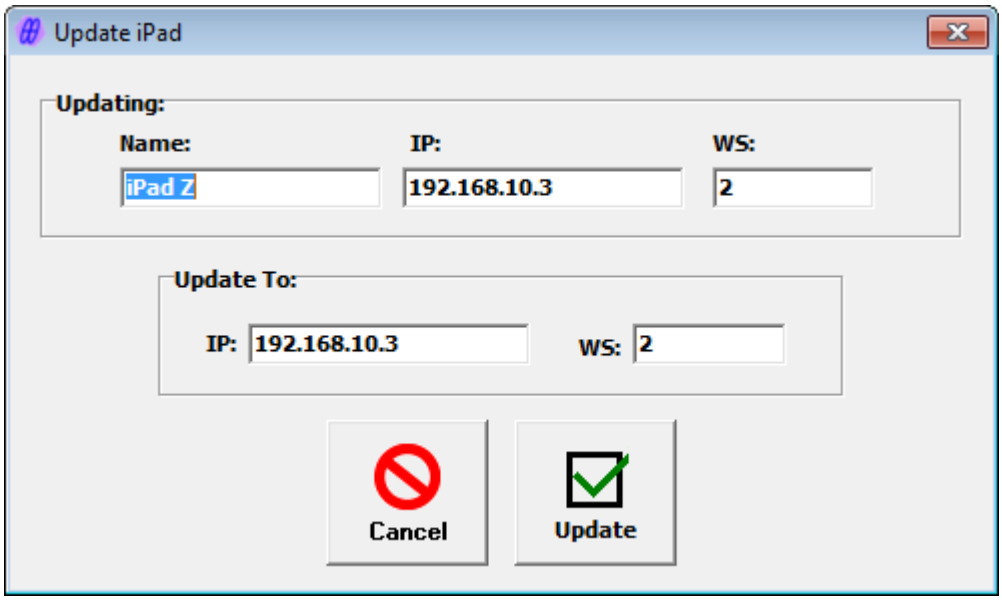
There are several messages that can be displayed when Add is clicked:

> "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 maximuim 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 Document Capture 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.

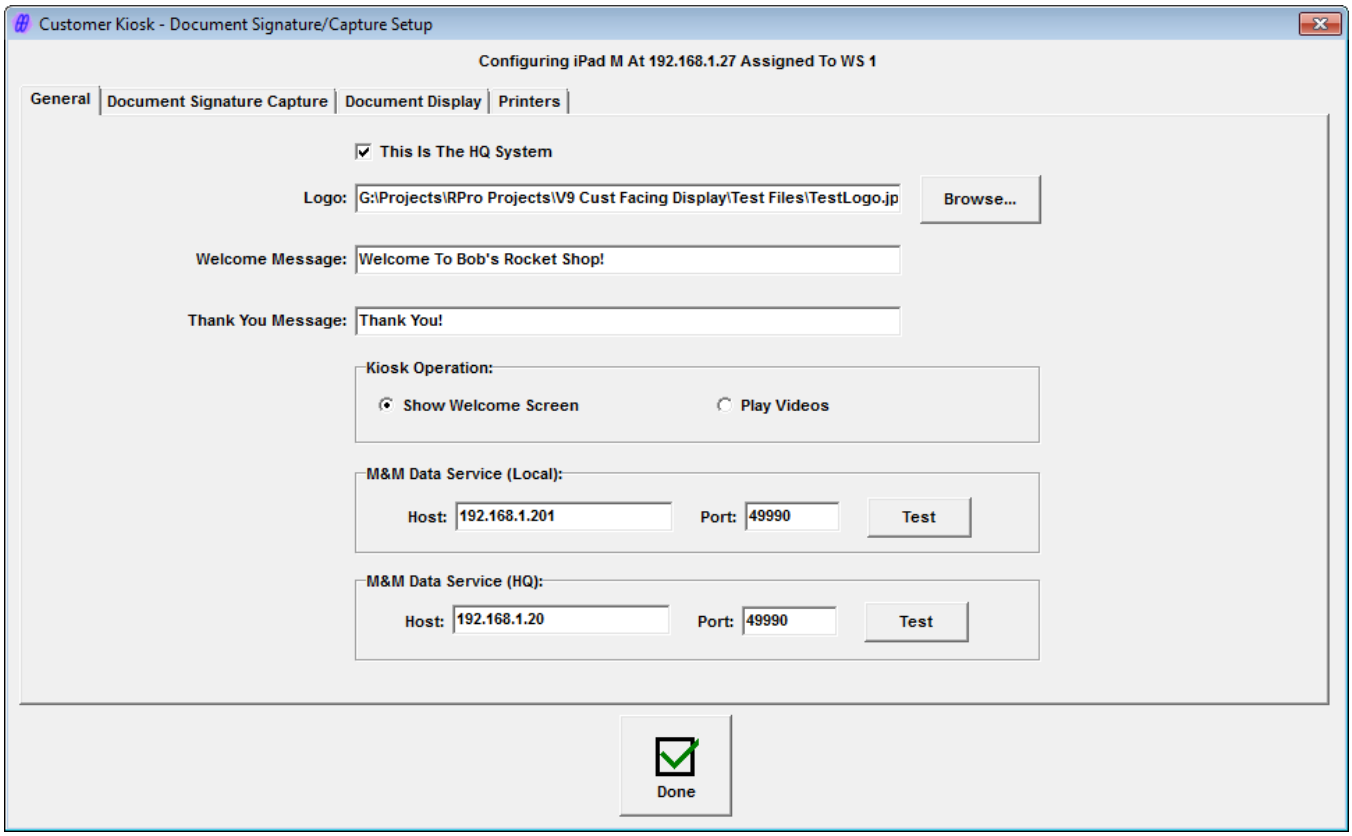
The Test Button

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 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



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

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

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 (Local)

Host – Enter the Host (IP Address) of the local 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.

M&M Data Service (HQ)

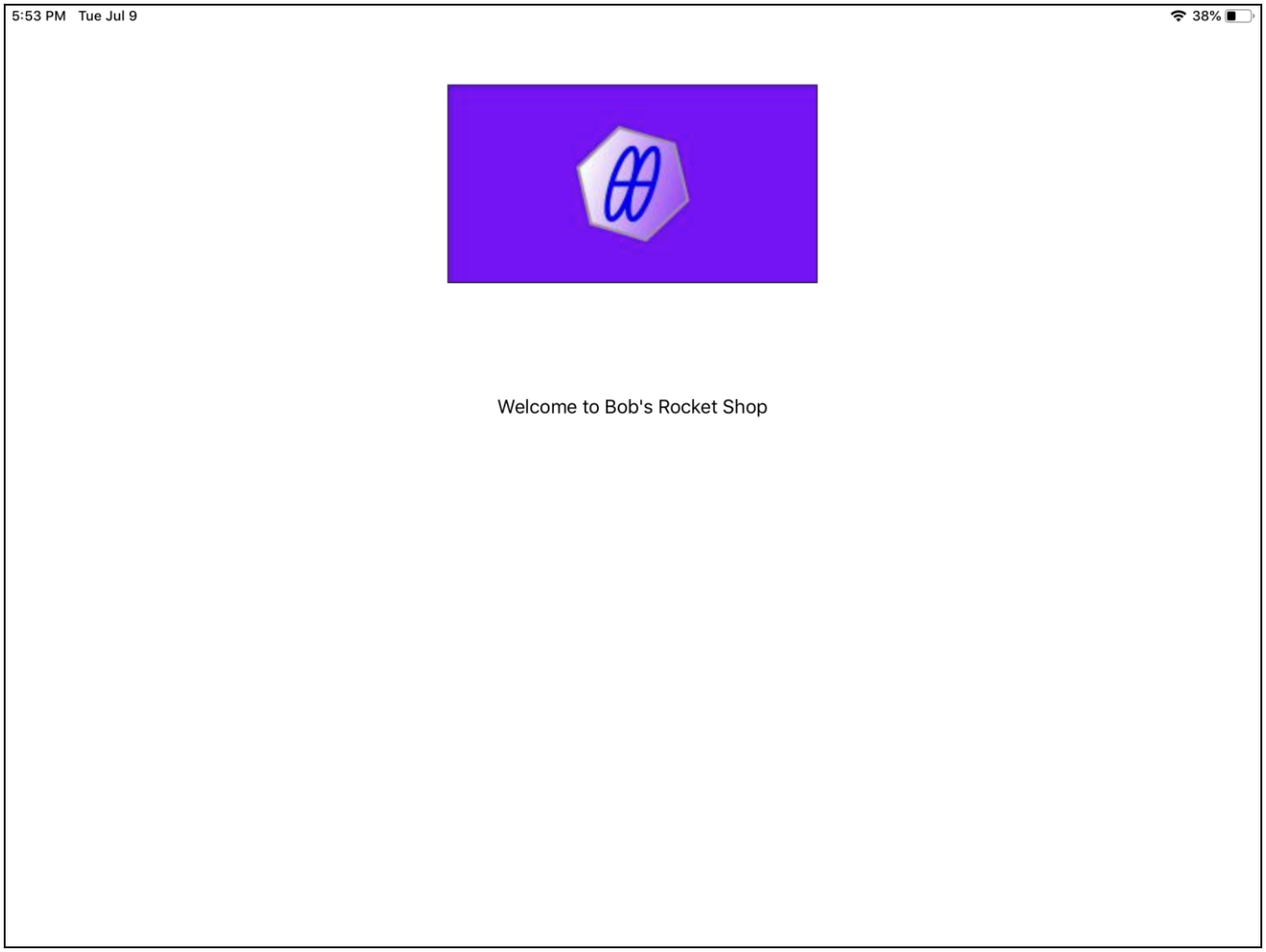
If Setup is being done on a store system that is NOT the HQ, enter the information for the HQ system.

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.

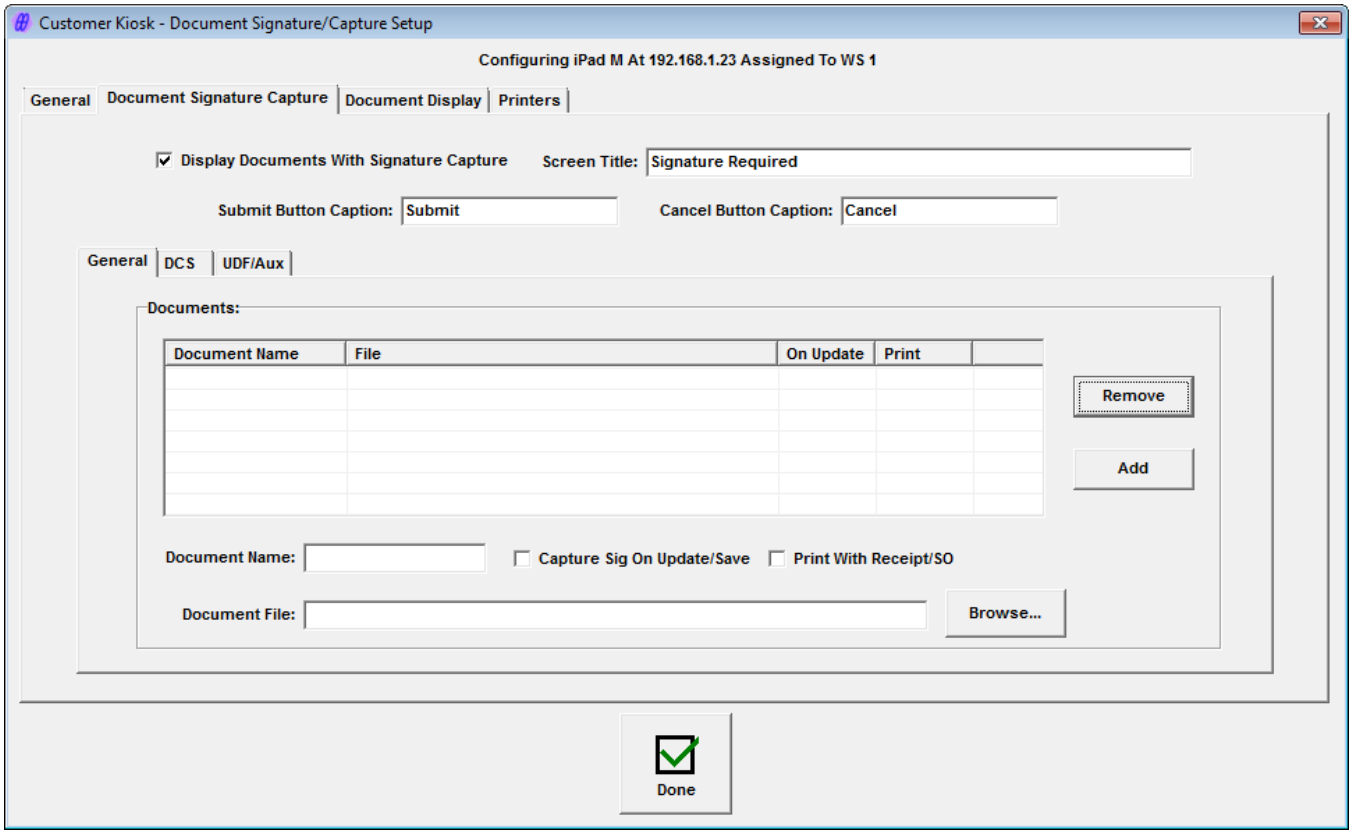
Test – Click the Test button to test the connection to the data service. The data service must be running for the test to be successful.

Sample iPad Welcome Screen



Logo and Welcome Message are shown.

Document Signature Capture Tab



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

All documents must PDF files.

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

Screen Title – The title that appears on the iPad screen.

Submit Button Caption – Caption on the button the customer will use to signal that the signature has been entered.

Cancel Button Caption – Caption on the button the customer will use to not sign the document.

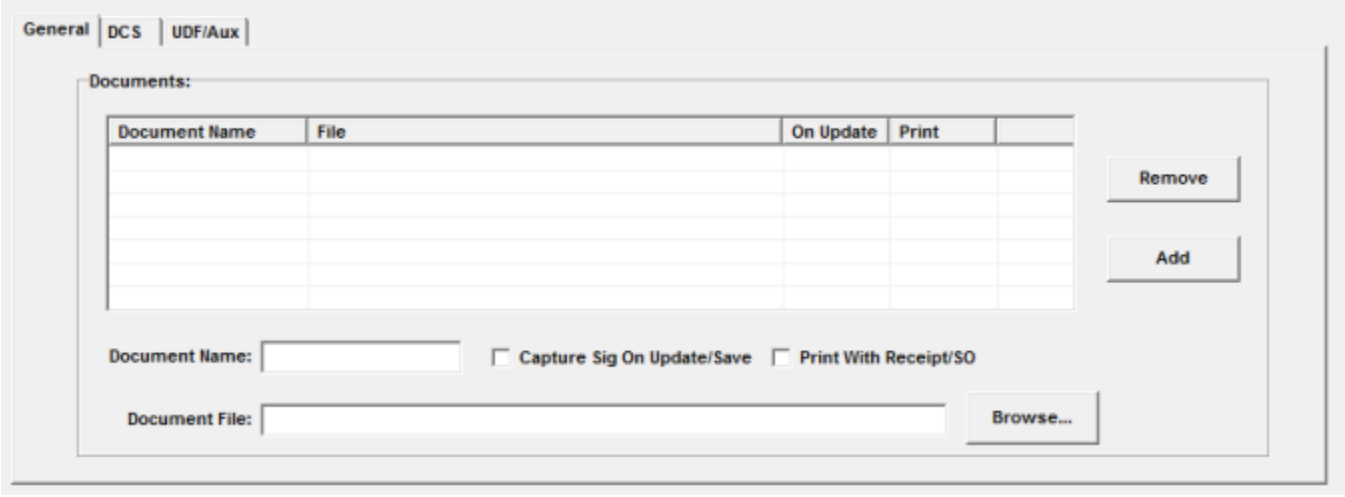
Documents Section

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.

Documents Section – General Tab

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



To add a document to the list:

Document Name – Enter a name for the document. This is to make it easier to identify which document is being presented at POS.

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.

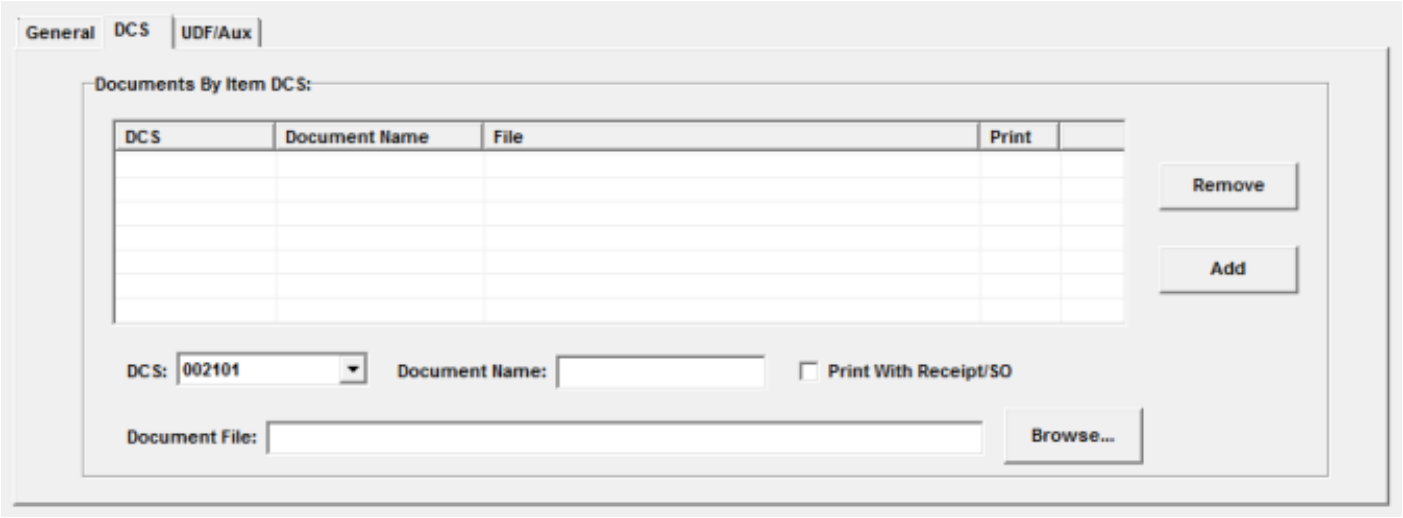
Document File – Enter or browse for the PDF file.

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.



To add a document to the list:

DCS – Select a DCS from the drop down.

Document Name – Enter a name for the document. This is to make it easier to identify which document is being presented at POS.

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.

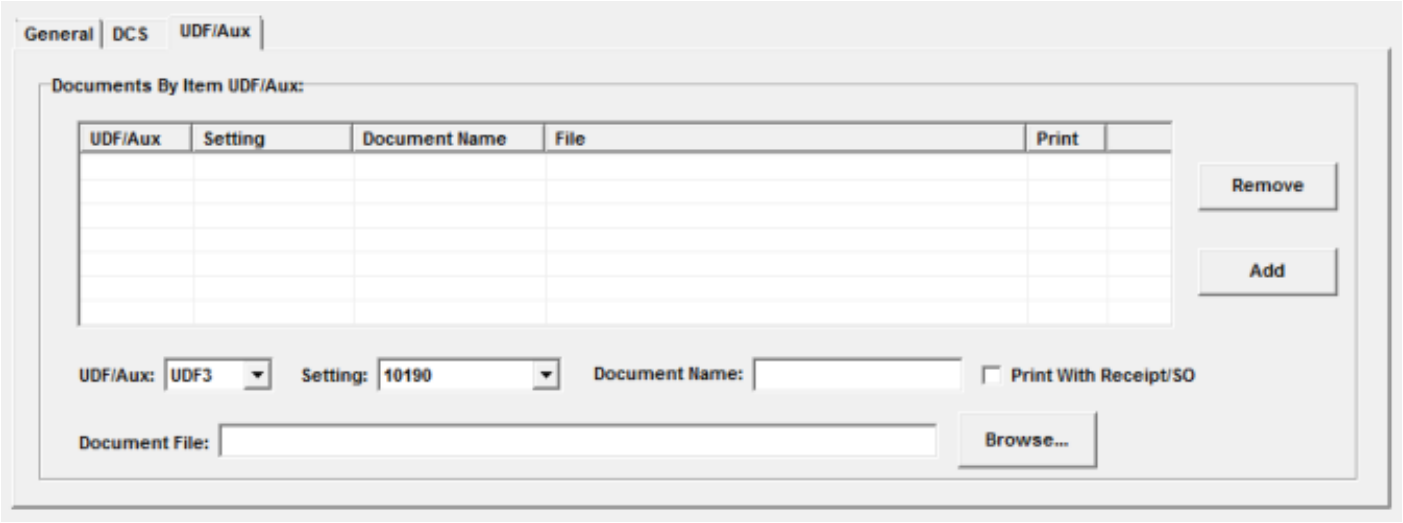
Click the Add button. The document is added to the list.

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.



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 is to make it easier to identify which document is being presented at POS.

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

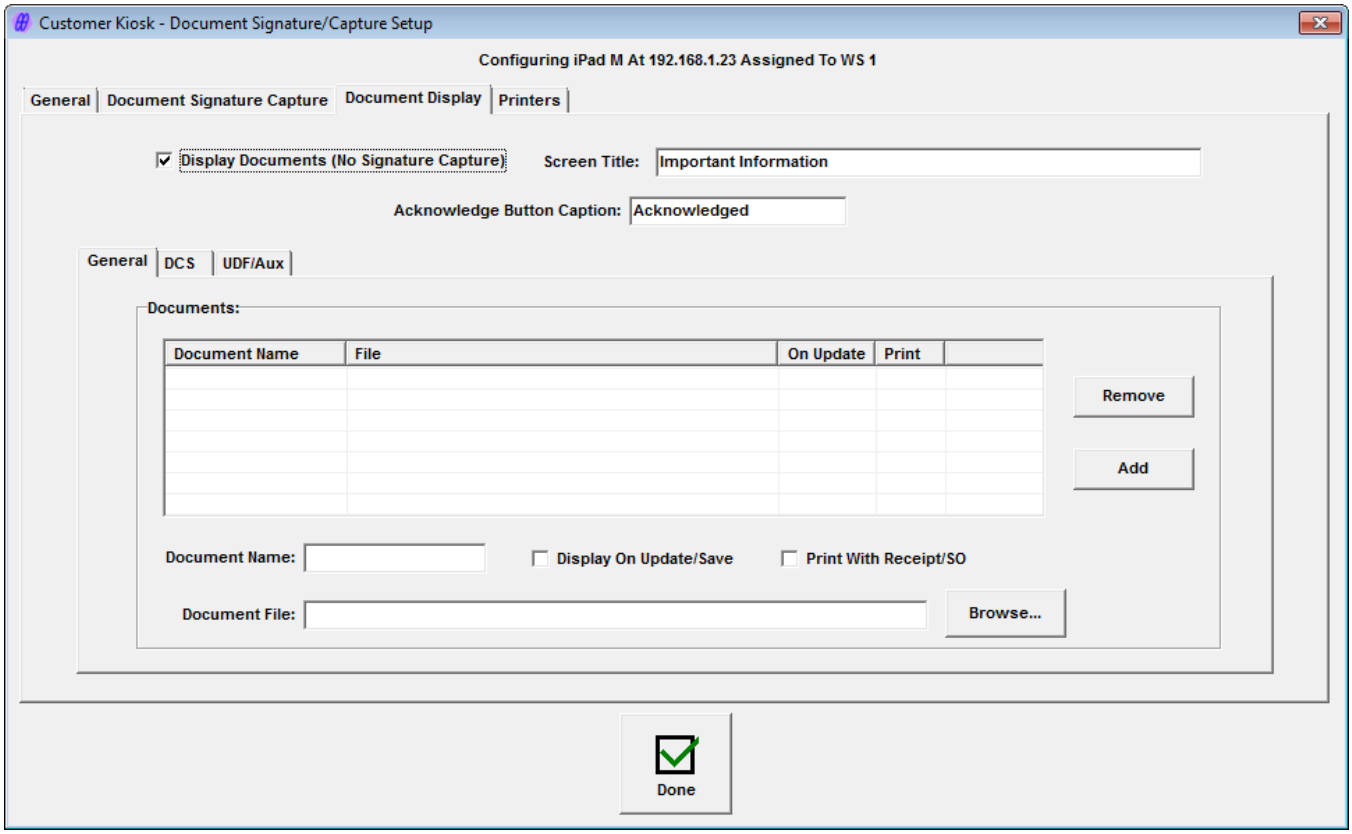
Document File – Enter or browse for the PDF file.

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



In Document Display, documents are displayed on the iPad for the customer. No signature is required. The customer touches a button to acknowledge they have seen the document.

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.

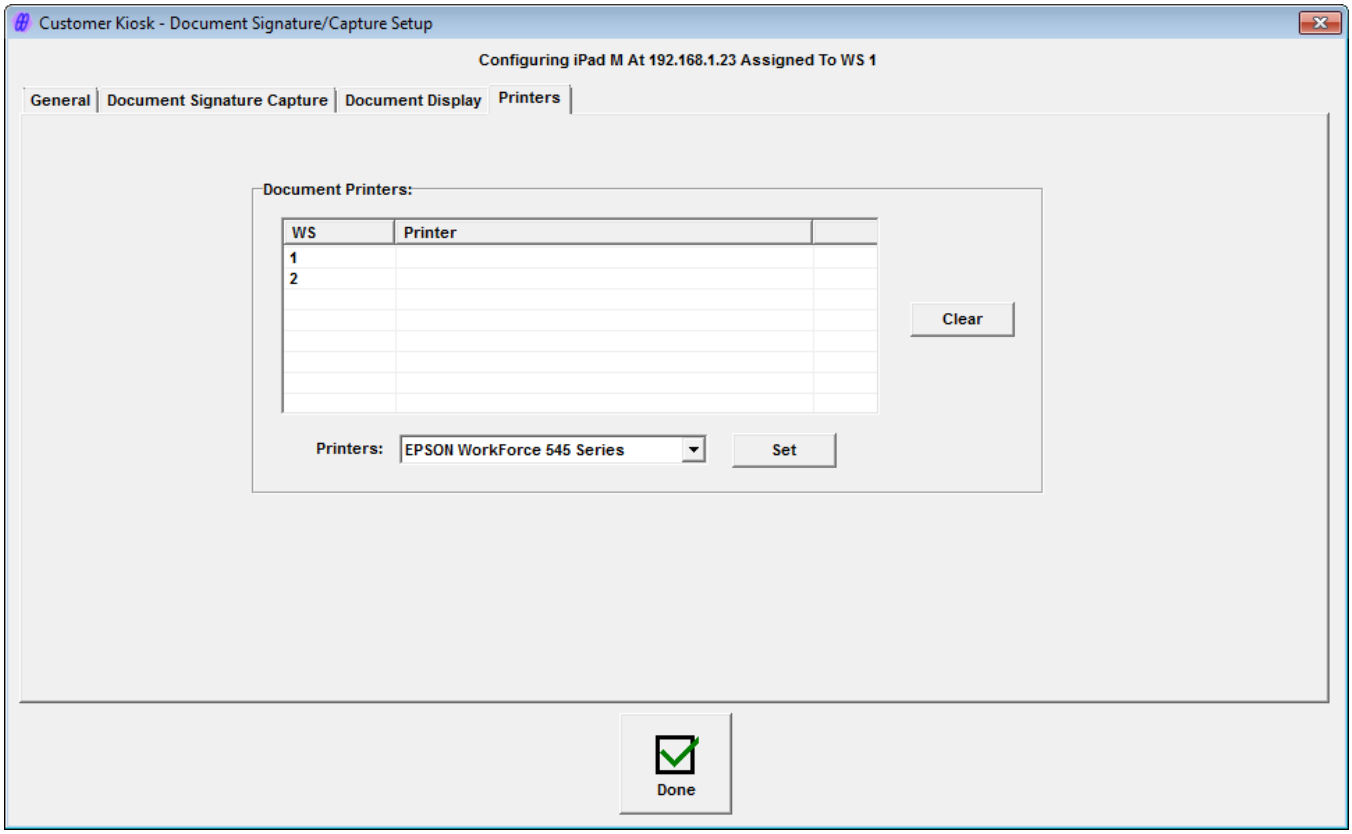
Screen Title – The title that appears on the iPad screen.

Acknowledge Button Caption – Caption on the button the customer will use to signal that they have seen the document.

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.

Printers Tab



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

All workstations are displayed in the grid.

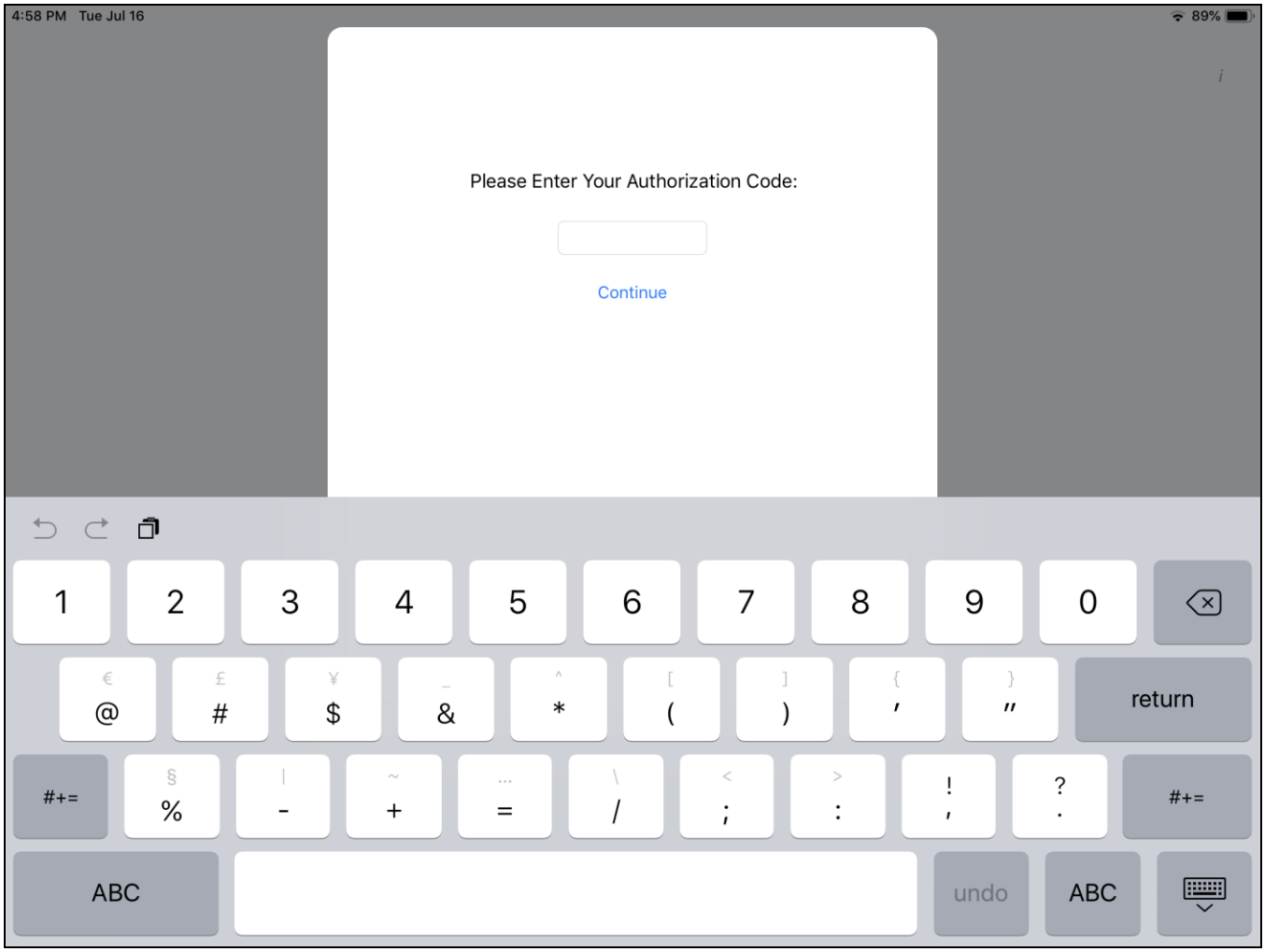
To assign a printer to a workstation, select the workstation, select a printer from the drop down and click the Set button.

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

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.

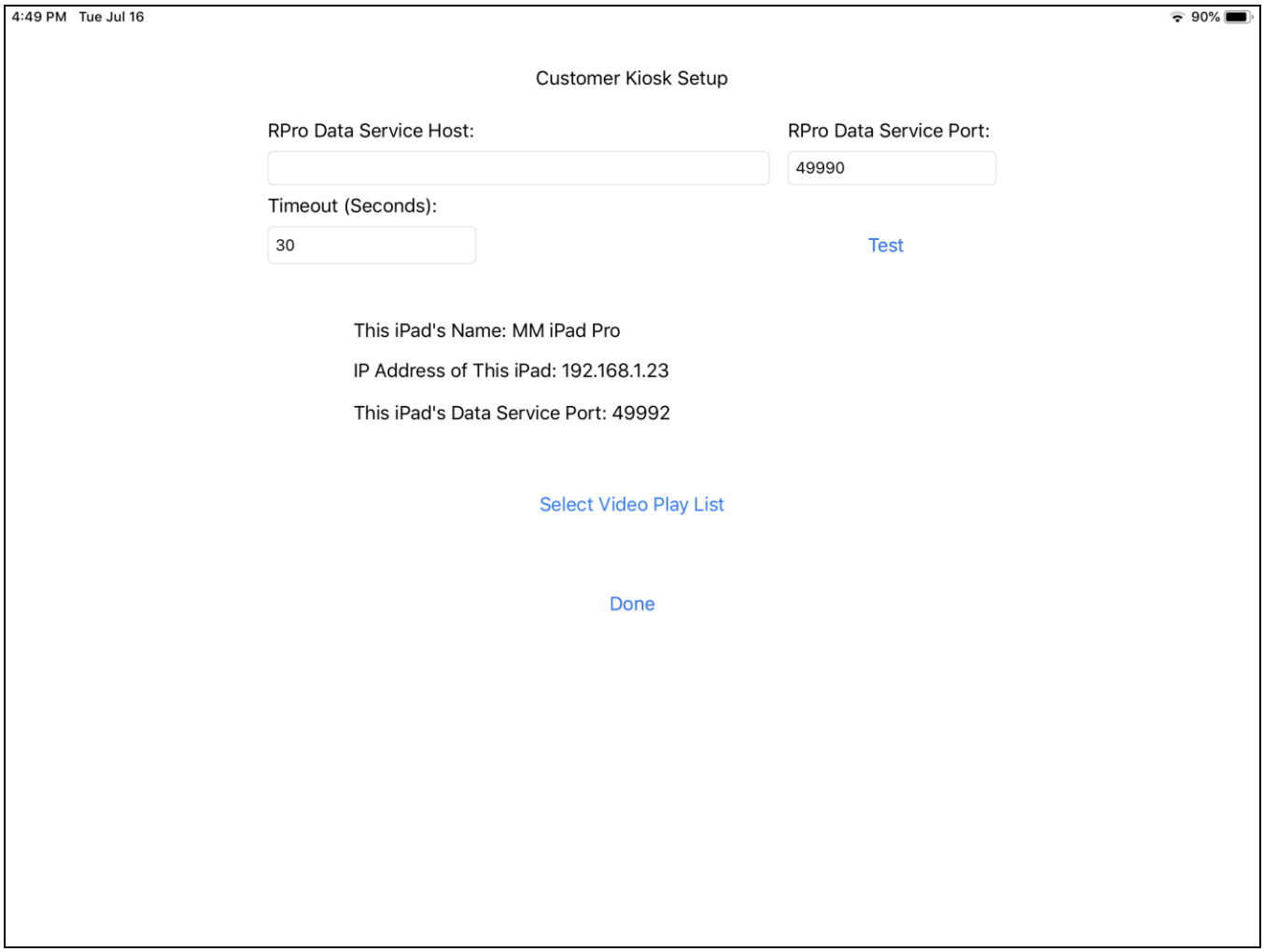
Enter 999999 (six nines) and touch Continue.

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 Document Capture Kiosk 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.

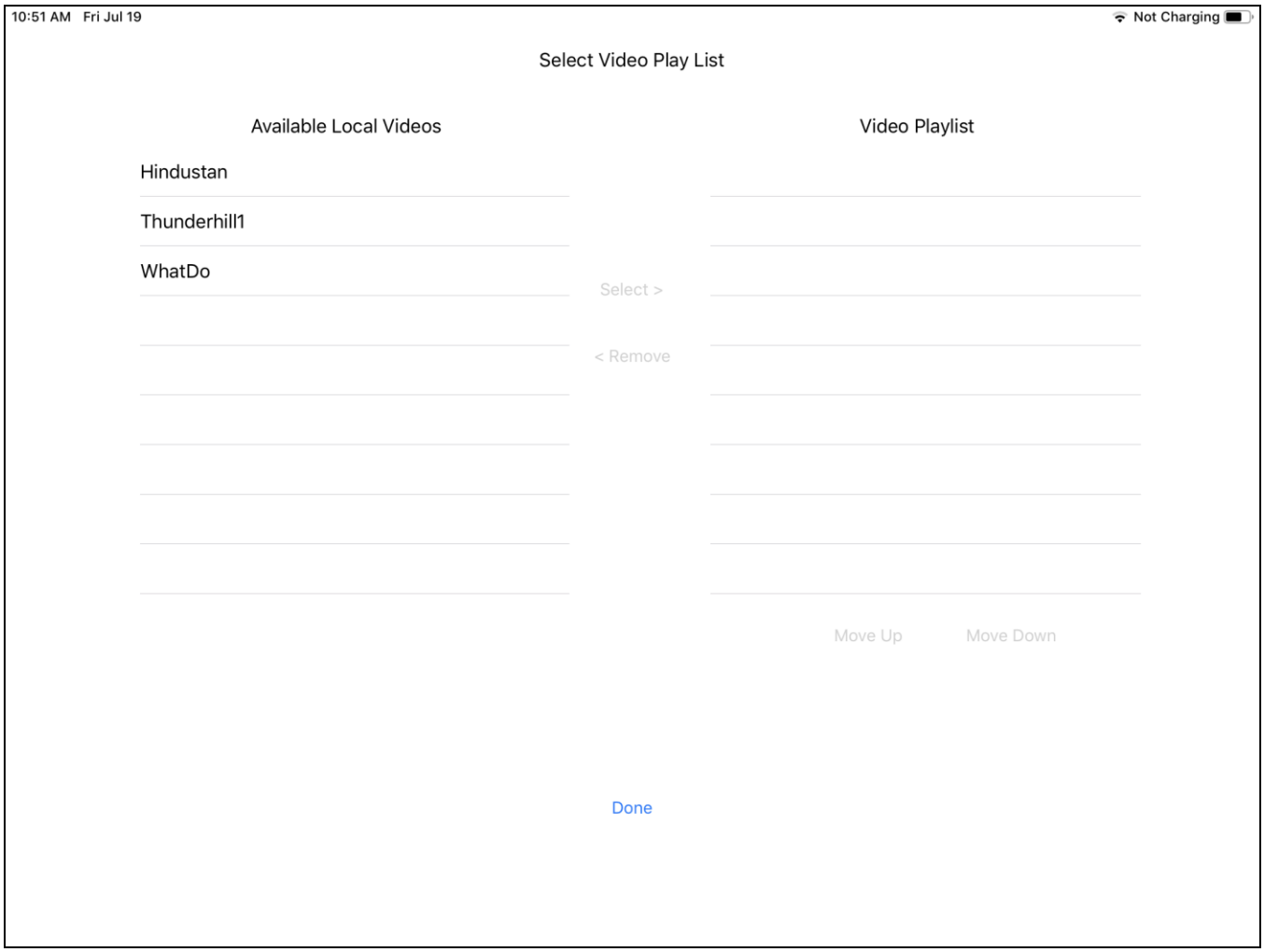
This screen also displays the device name and IP address of the iPad.

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:



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.

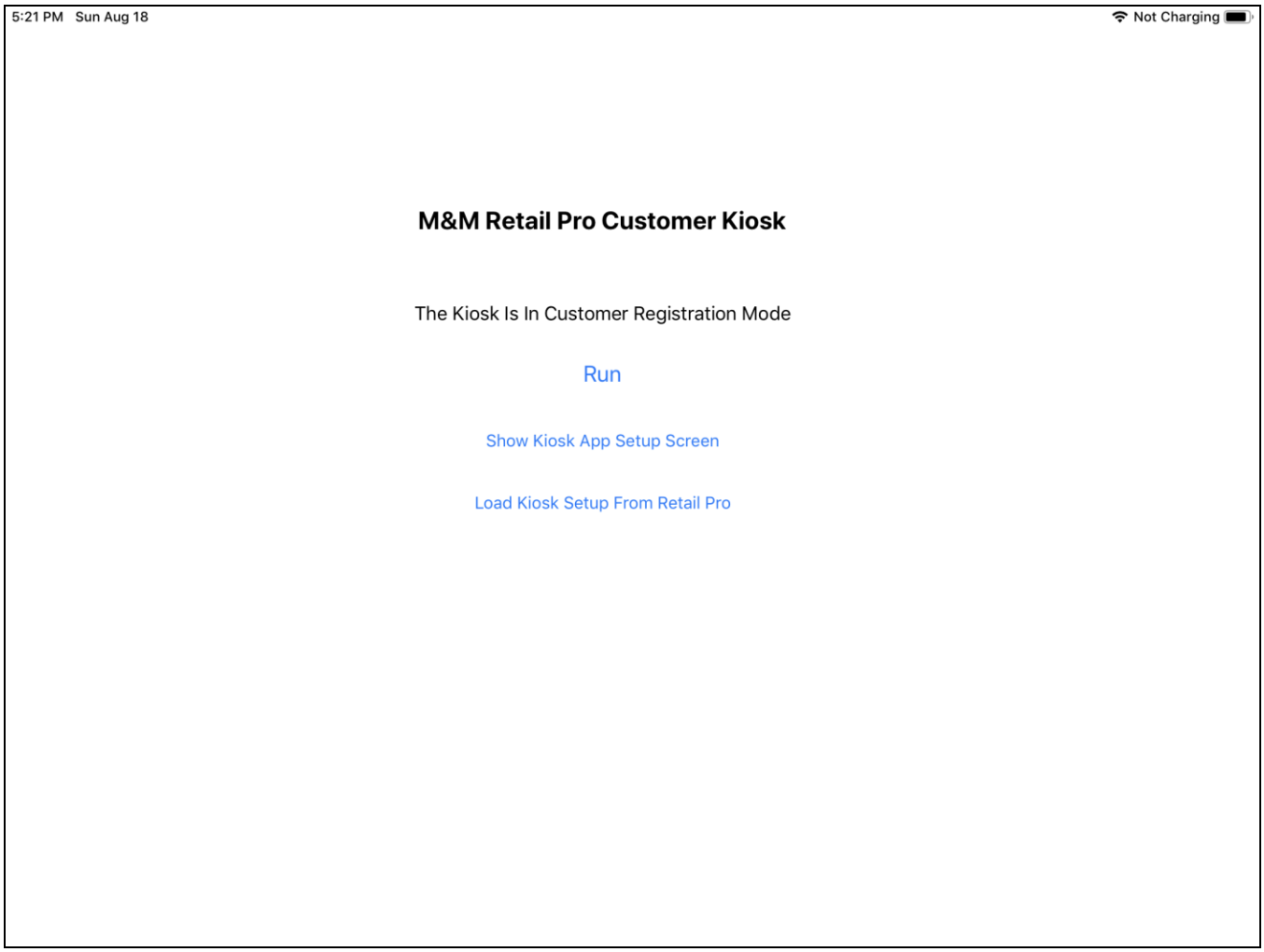
To remove a video from the playlist, touch the video and then the Remove button.

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.

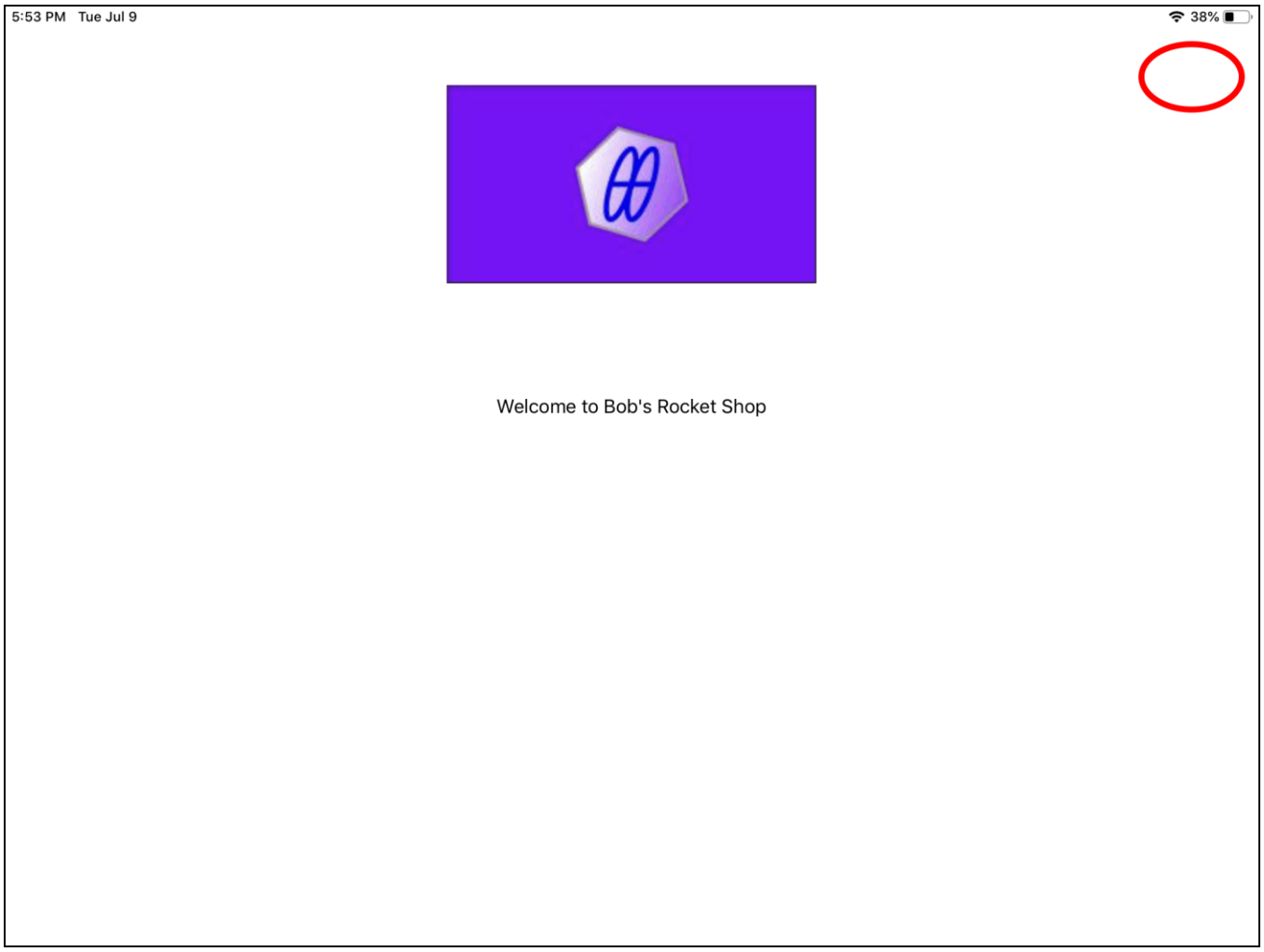
Touch "Load Kiosk Setup From Retail Pro" to load the Setup information that was entered in a Customer Kiosk plugin on the Retail Pro side.

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

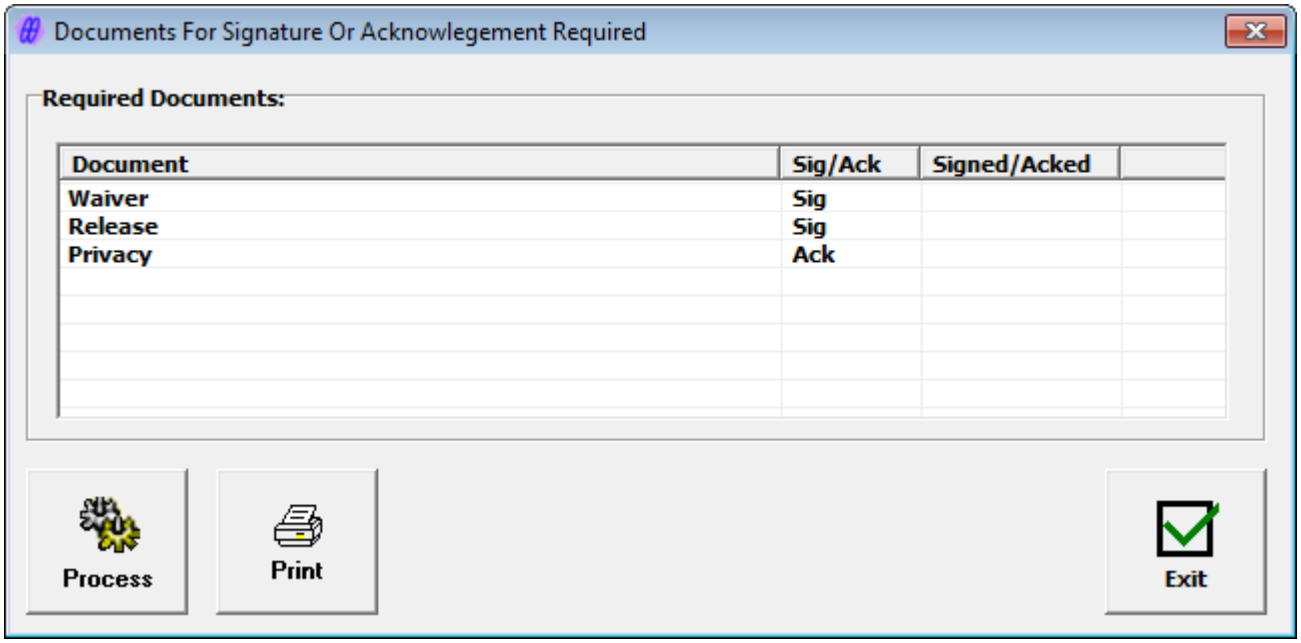
A Bill To Customer is required for document signatures. A Bill To Customer is not required for document display.

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

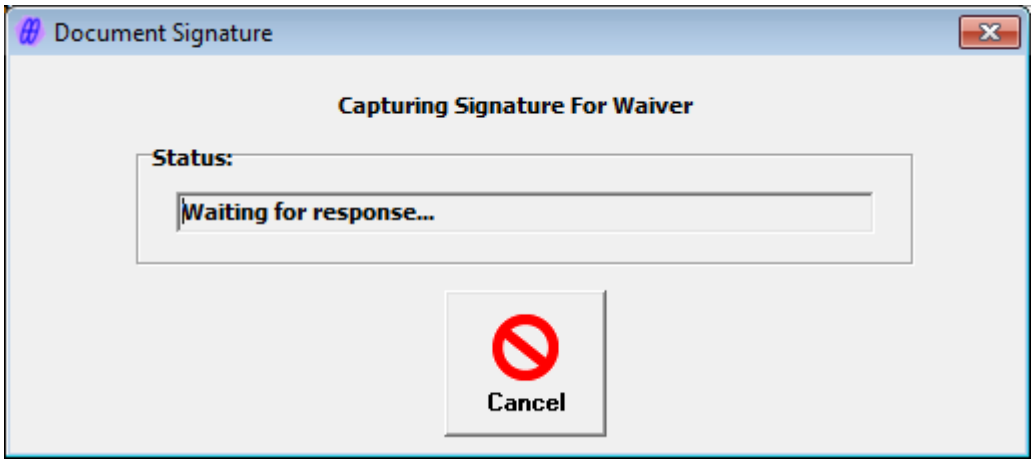
Required Document List

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 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 either presented for signature or displayed on the iPad.



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



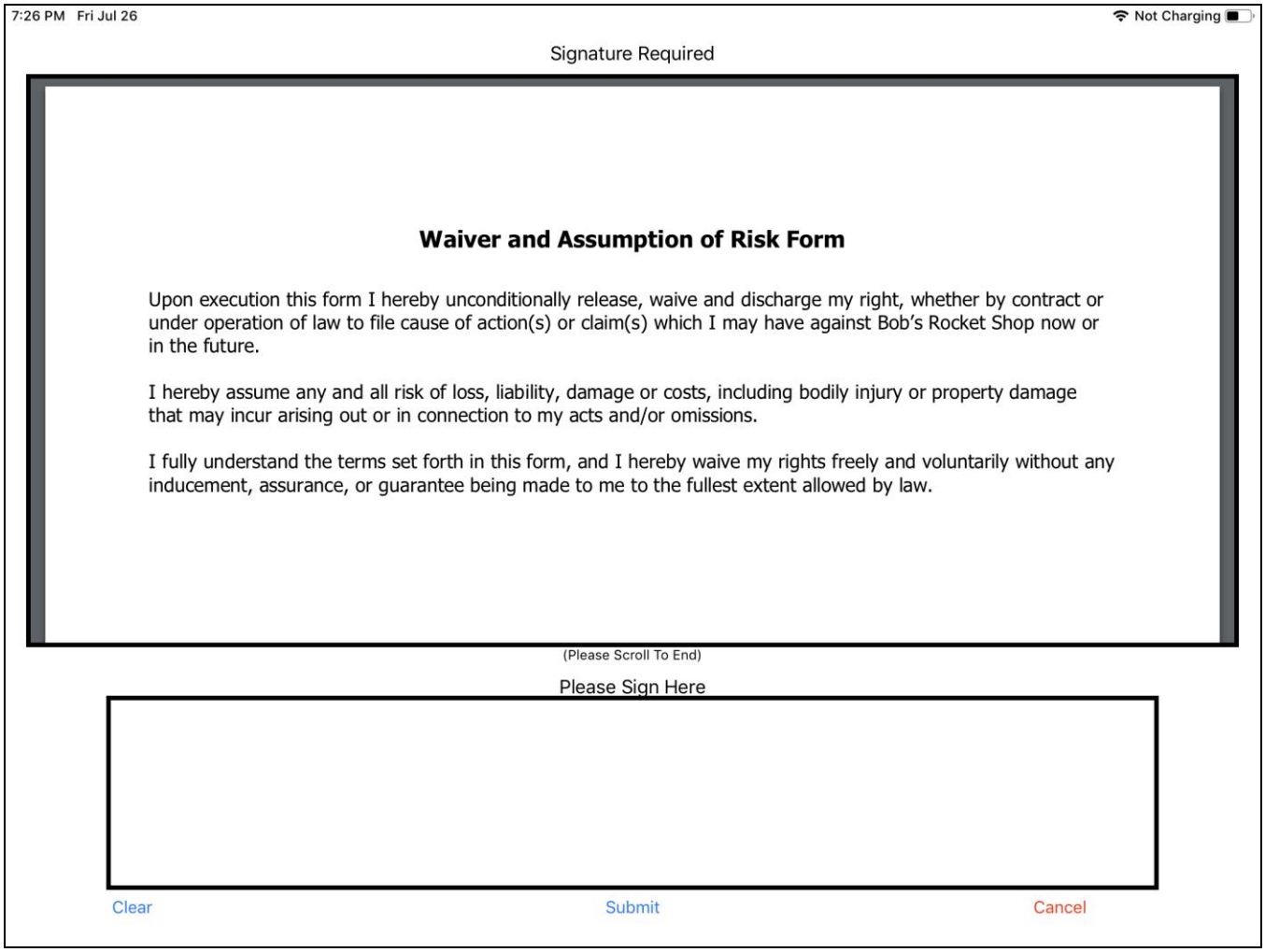
This dialog shows the name of the document at the iPad.

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

The Cancel button can be used to cancel the signature capture or document display on the iPad.

Signature Capture on iPad

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



The customer will sign the document and touch the "Submit" button or touch the "Cancel" button.

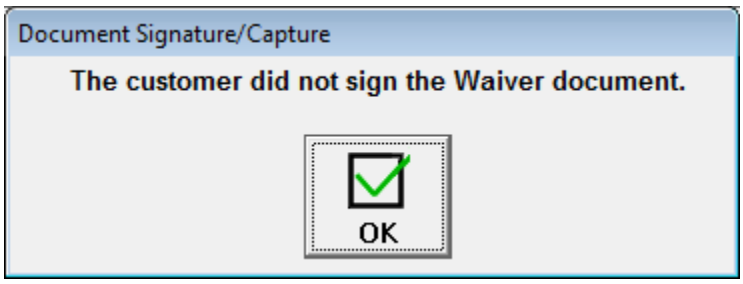
Customer Signs Document

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

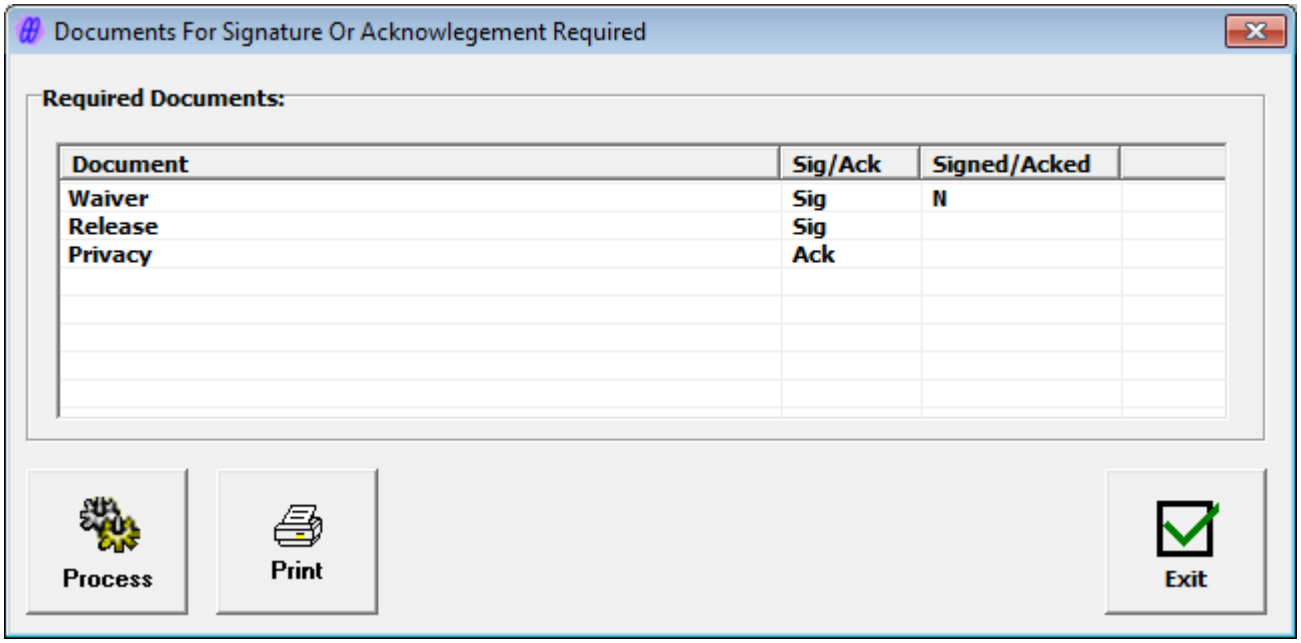
When all documents have been presented, the Required Documents screen is closed and the receipt is updated or the sales order is saved.

Customer Does Not Sign Document

If the customer touches "Cancel" on the iPad, in Retail Pro, the Cashier will see:



In this case, no other documents will be displayed on ther iPad and the Required Documents list is updated:



The cashier can take the following actions:

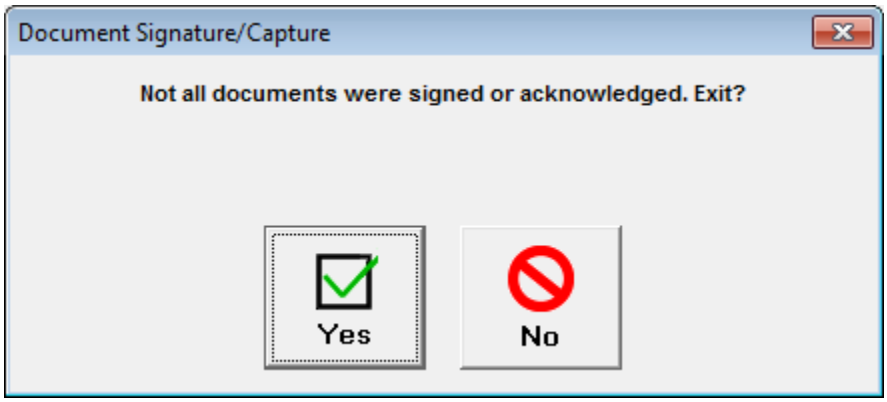
Present the document on the iPad again by selecting it in the list and clicking Process.

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

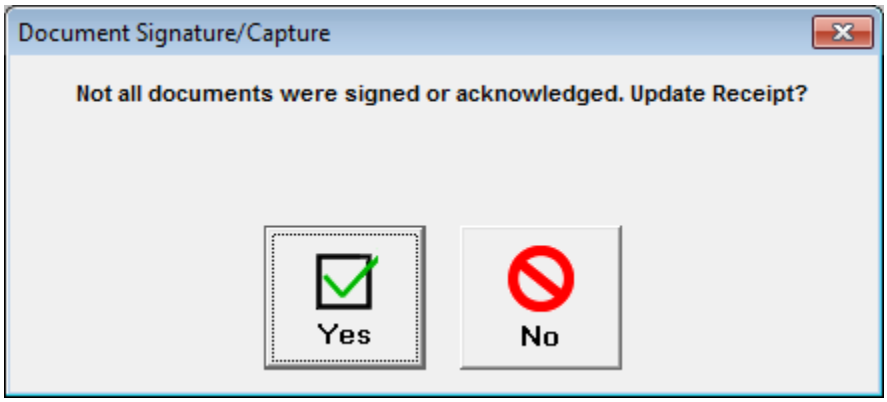
Select a document and click Print. (Documents that are printed will include signatures if signed.)

Click Exit.

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

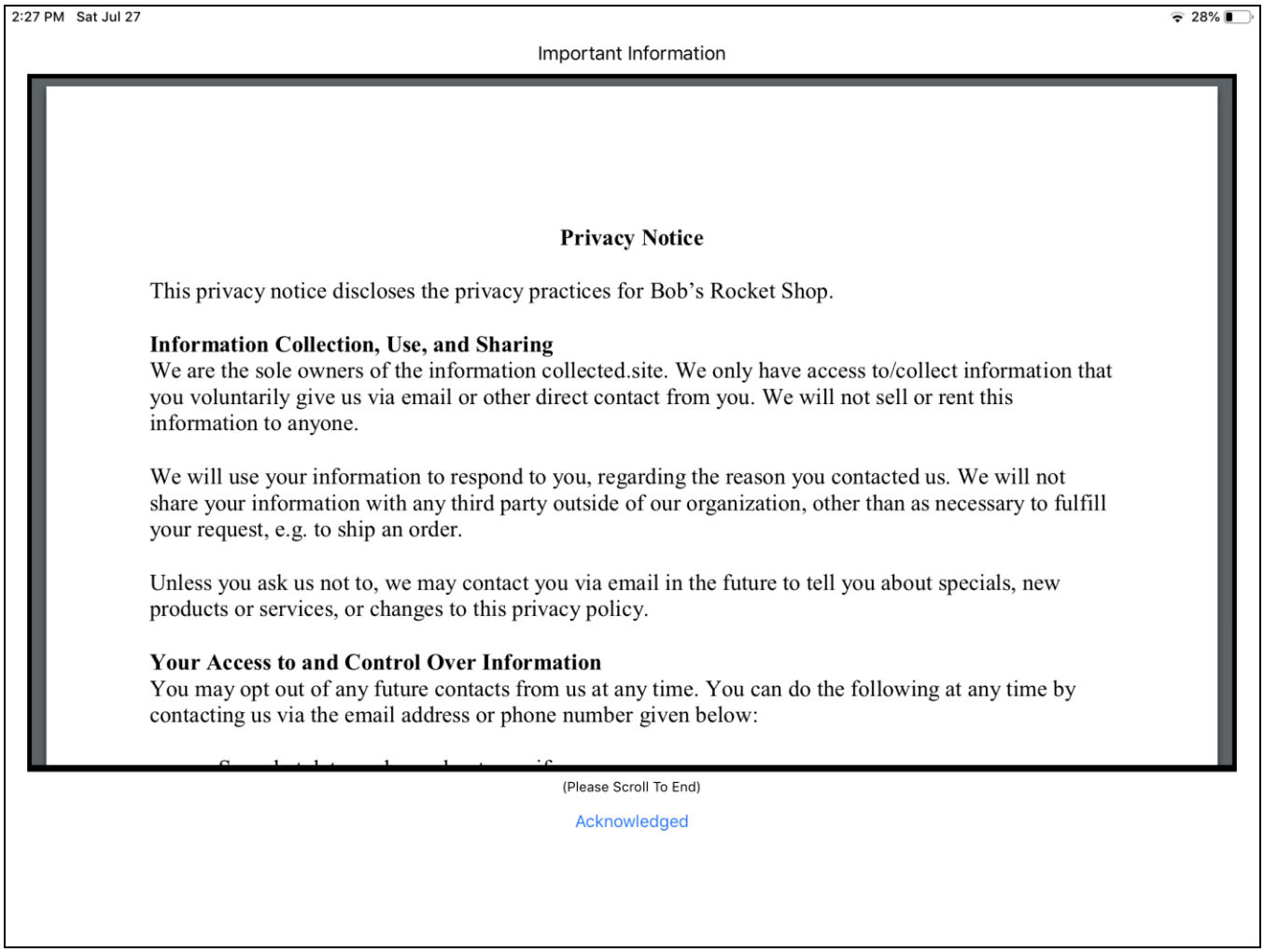


The cashier is then prompted to update the receipt or save the sales order:



Document Display

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



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

Document Printing On Update Or Save

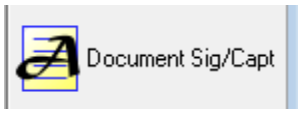
Documents that were marked as "Print with Receipt/SO" in Setup will be printed when the receipt is updated or sales order saved.

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

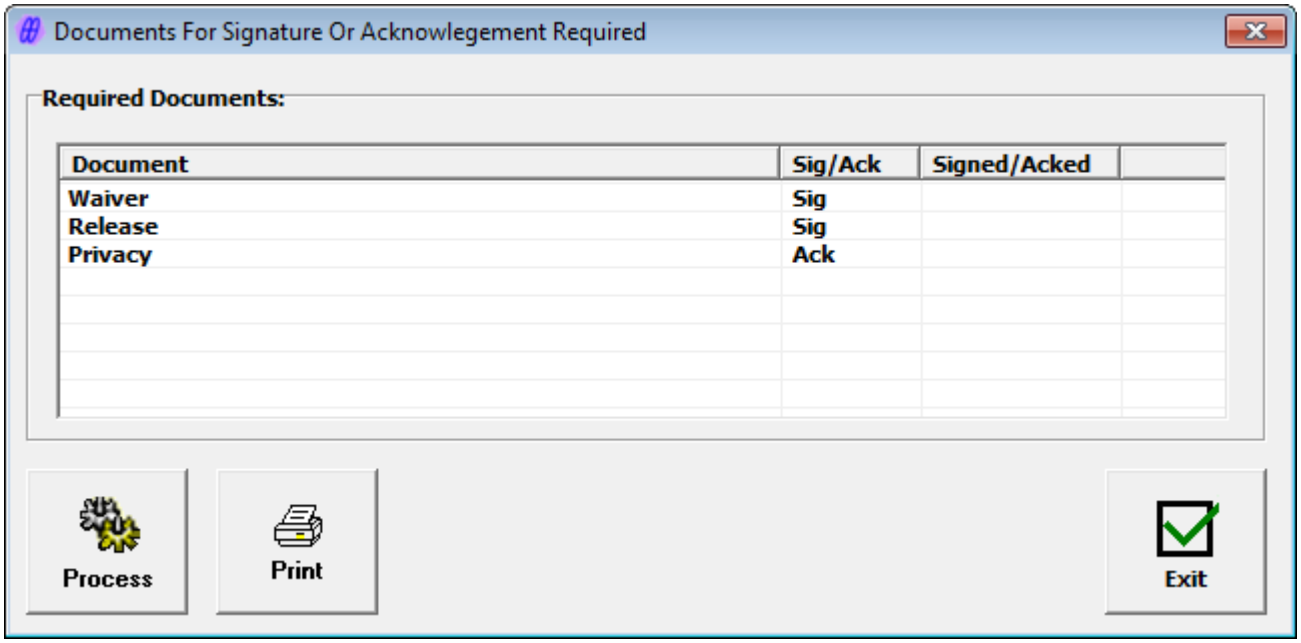
Document Signature and Display (Initiated By Cashier)

From a reciept 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:



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

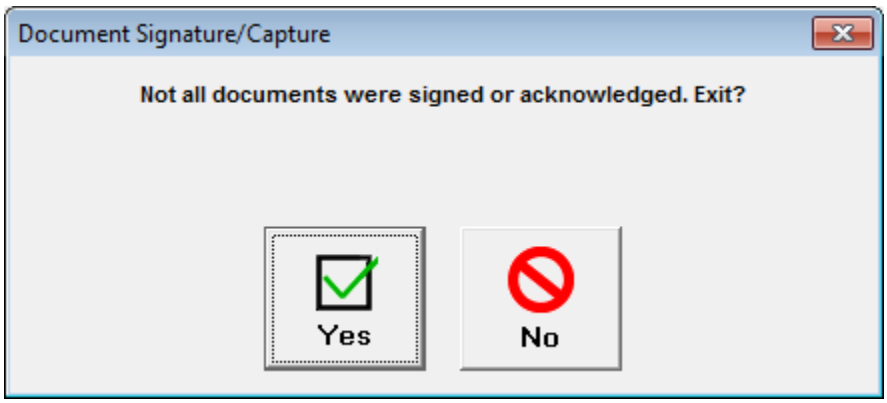
The cashier can take the following actions:

Select a document frrom the list and click Process to present the document on the iPad.

Select a document and click Print. (Documents that are signed incude 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 ackowledgement 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 wsas not signed, an unsigned copy will be printed.

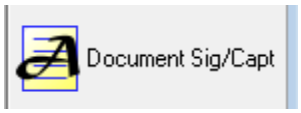
Stores And The HQ System

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

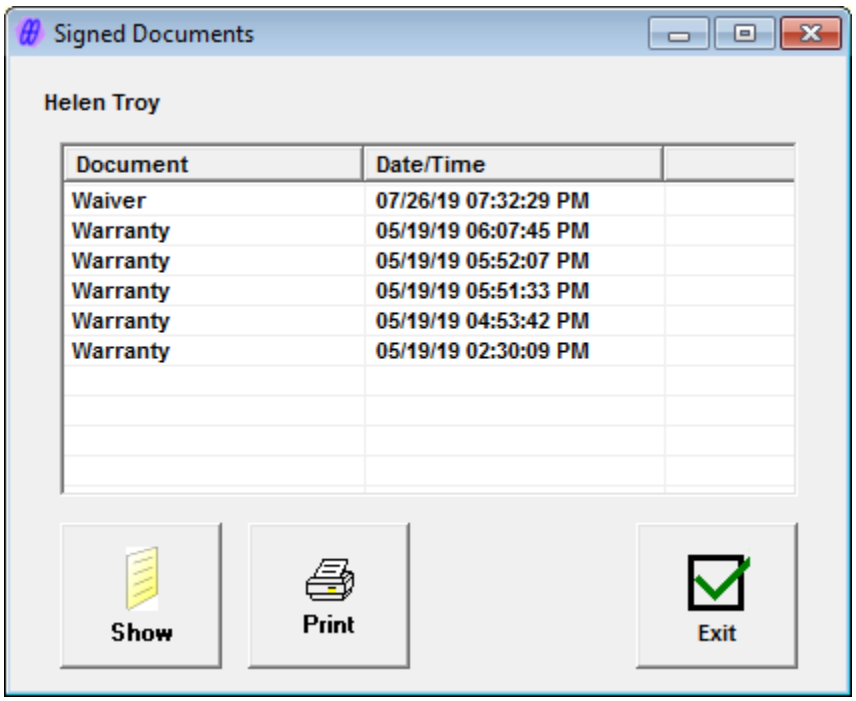
This means that signed documents from receipts and sales orders can also be accessed and printed at the HQ system.

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 wil lbe 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".

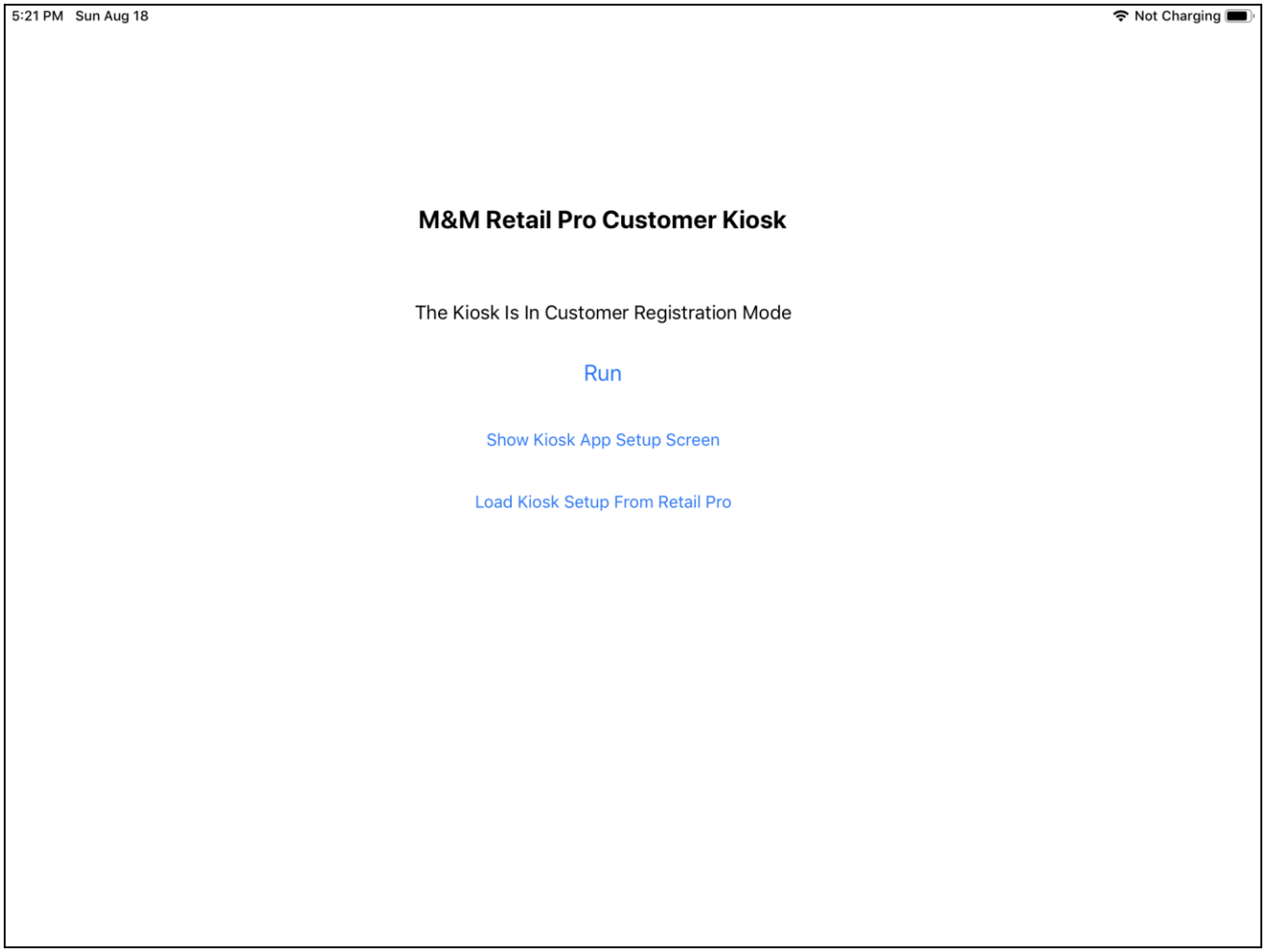
This stops the requirement that the document be acknowledged on update but does print the document when the receipt or sales order is printed.

Appendix A – iPad Information

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

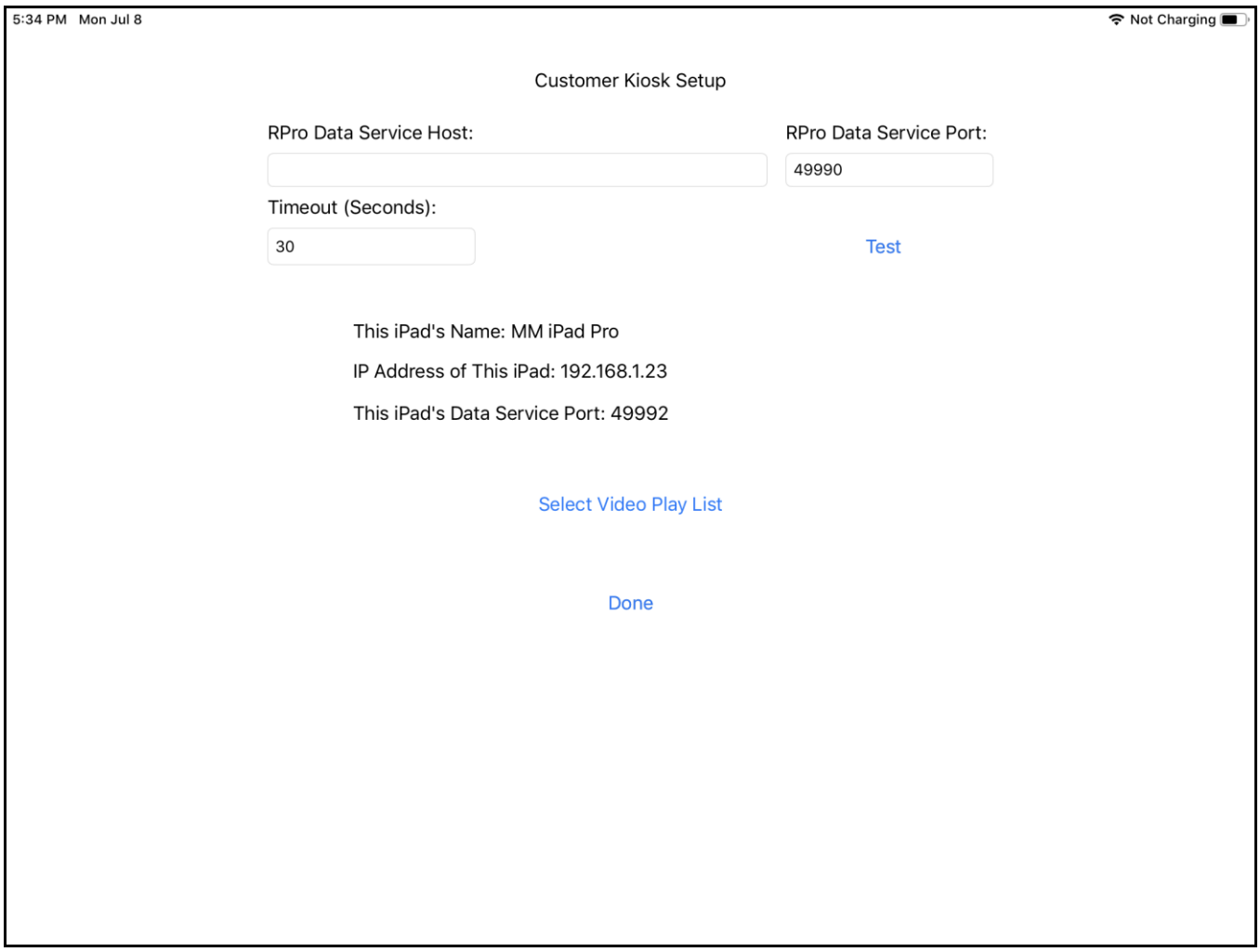
Customer Kiosk App Main Screen

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



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

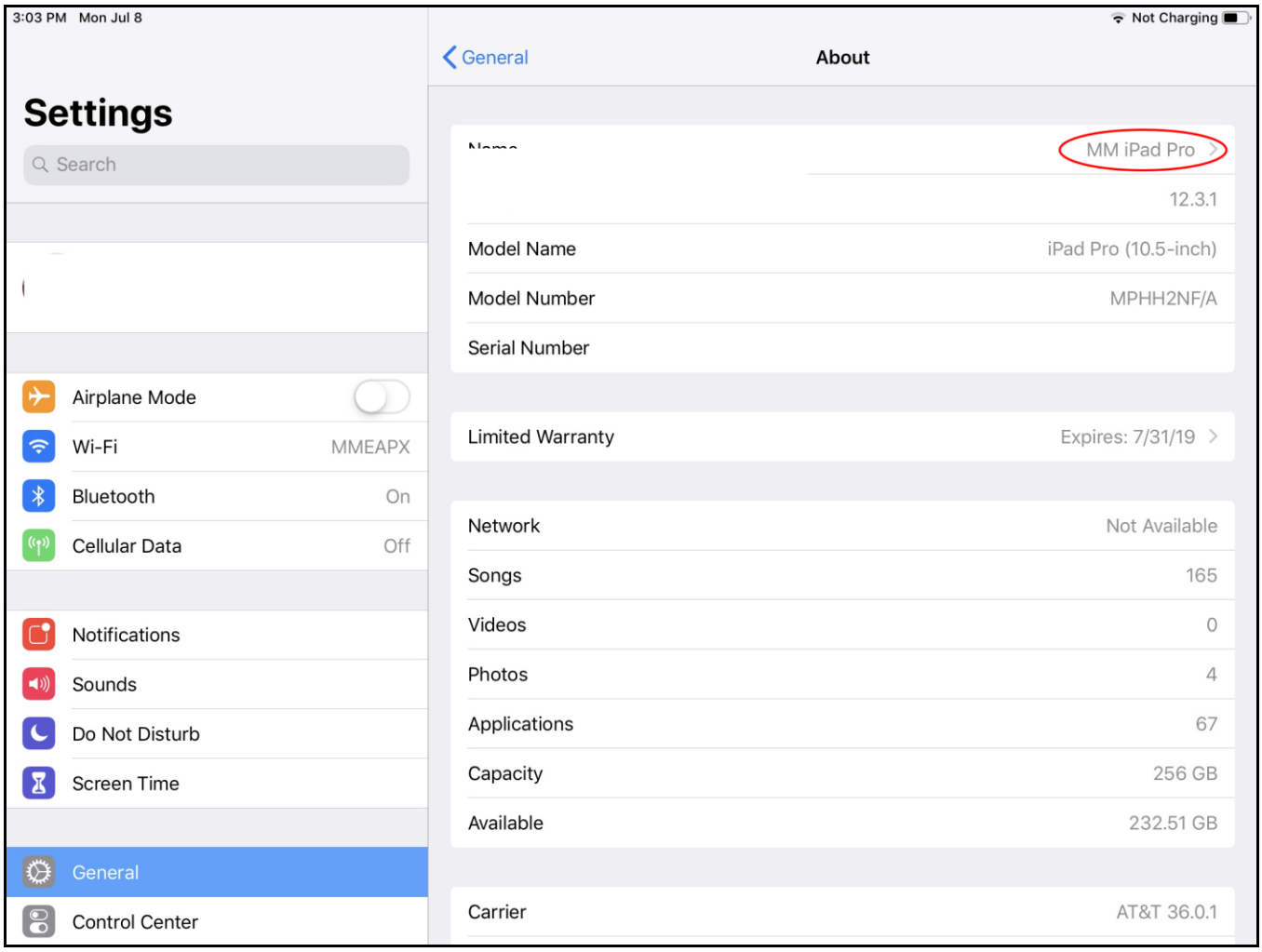
Customer Kiosk App Setup Screen



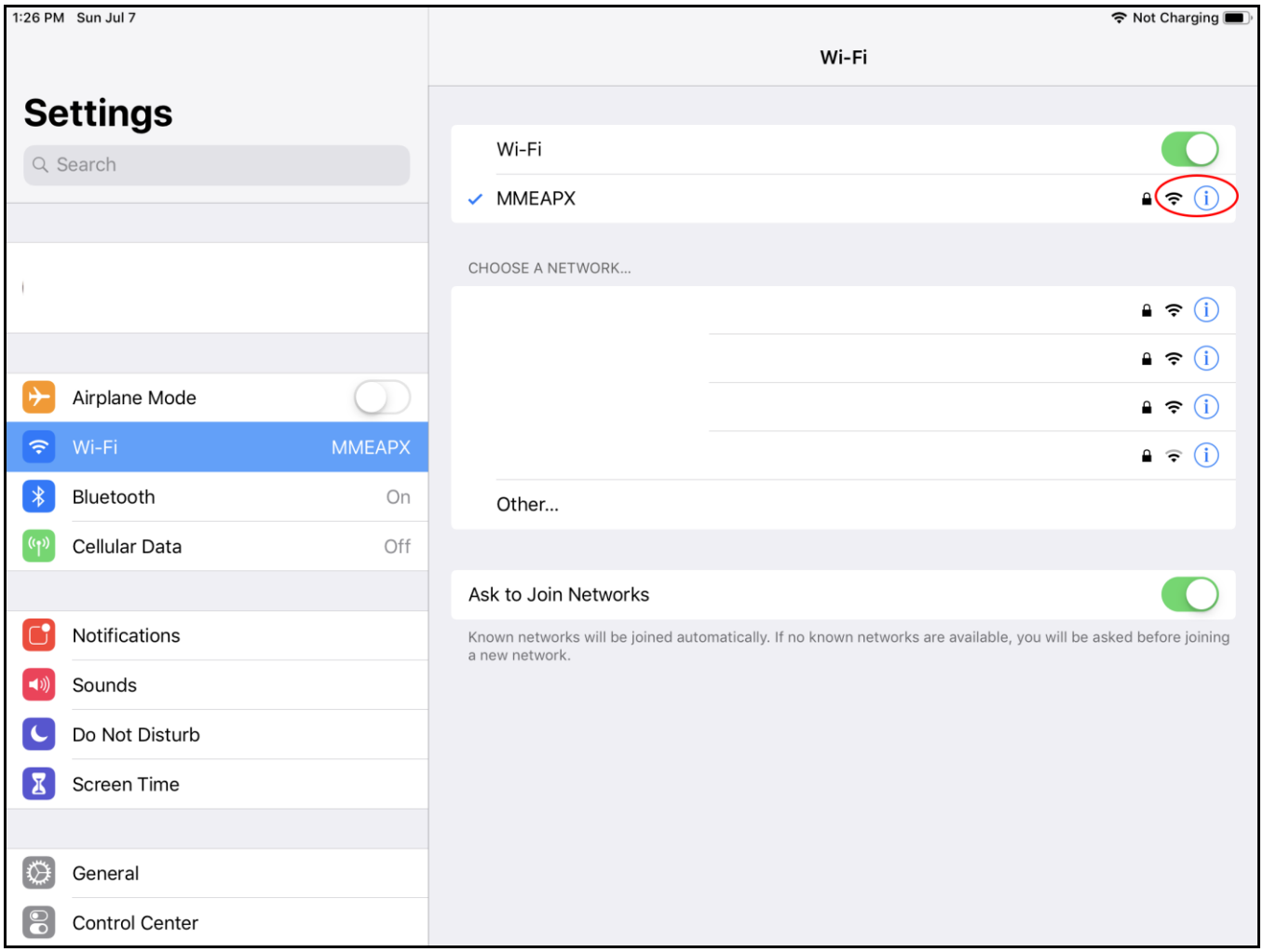
The iPad's name and IP address are displayed on this screen.

iPad Settings

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

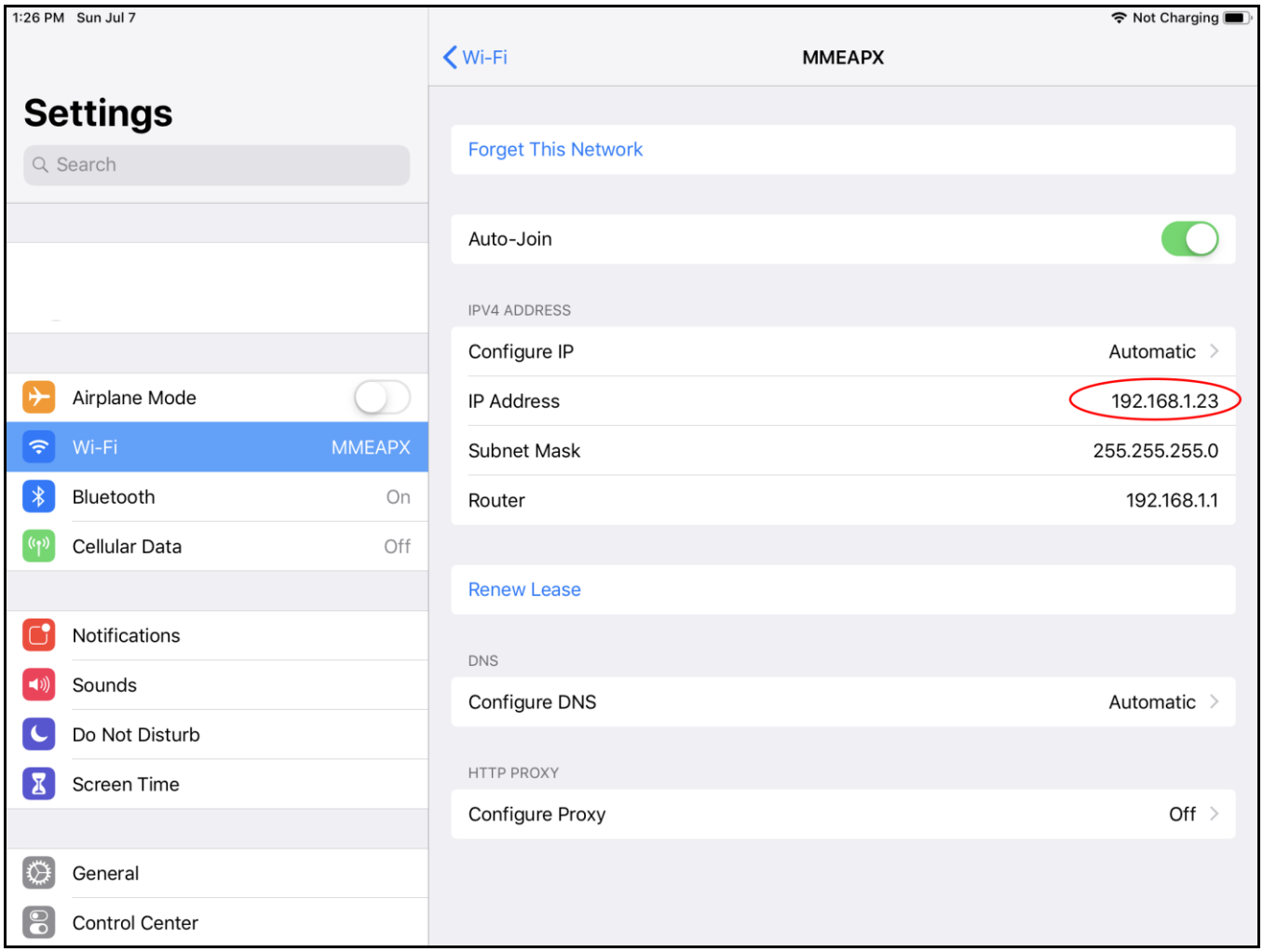


To find the IPAddress, touch Wi-Fi:



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

The IP Address will be shown:


1:26 PM Sun Jul 7
Not Charging
Settings
Search
Airplane Mode
Wi-Fi MMEAPX
Bluetooth On
Cellular Data Off
Notifications
Sounds
Do Not Disturb
Screen Time
General
Control Center
Wi-Fi
MMEAPX
Forget This Network
Auto-Join
IPV4 ADDRESS
Configure IP Automatic
IP Address 192.168.1.23
Subnet Mask 255.255.255.0
Router 192.168.1.1
Renew Lease
DNS
Configure DNS Automatic
HTTP PROXY
Configure Proxy Off

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
Logs	
CKCustInfo	RetailPro9\MM\CustKiosk\Logs\CustInfo*
MMRProDataSvc.exe	C:\Program Files (x86)\MMEnterprise\MMRProDataSvc
Setup	
CK*.ini	RetailPro9\MM\CustKiosk
Signed Document PDFs	C:\Program Files (x86)\MMEnterprise\CustKiosk\SignedDocs