Lucidiom Tech Notes:

EQ Gifting Configuration



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Revision History

Version	Date	Brief Description	Author
0.5	03/17/08	Draft	Chris Pollard
1.0	05/09/08	First Revision	Louis Johnson
1.5	05/13/08	Second Revision	Louis Johnson
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1.8	10/9/08	Final Revision	Russ McIver

Purpose of This Document

This document outlines the setup process for activating the EQ Gifting products on the APM kiosk. It also covers usage of the EQ Gifting order tracking website.

Requirements for Setup

- The kiosk(s) must be online.
- The kiosk(s) must be using version 6.0 or above of the APM software.
- The gifting license must be activated for the kiosk(s).
- The EQ Gifting installer must be installed onto each kiosk.
- The store address information must be complete in the Setup Wizard.
- The customer first and last names are fields are required information as part of the order.

Using the Setup Wizard

The Setup Wizard is used to customize all aspects of the EQ gifting add-on component.

To access the Setup Wizard:

- 1. Access the looping intro movie.
- 2. Touch the lower left corner of the screen to access a hidden menu.
- 3. At the next screen, press 1 2 3 4 (substitute your actual passcode) and then press the Enter button.
- 4. Hit the Next Menu button, then the APM Setup Wizard button.

Note: When you launch the Setup Wizard from the Admin screen, the APM software shuts down. The APM software will launch again automatically when you exit the Setup Wizard.



The Setup Wizard consists of three panes which you use to access different screens for customizing your APM user interface, as noted in Figure 1. The three panes are:

- 1. **Primary Navigation Pane**: Use this pane as the main menu. Use buttons in the primary pane to navigate between the menu sections.
- 2. **Category Navigation Pane**: This pane lists the main categories for each menu configuration.
- 3. **Customization Pane**: Use this area to view and customize the APM user interface. By default, the Kiosk Information section is displayed.

Confirming the APM Software Version

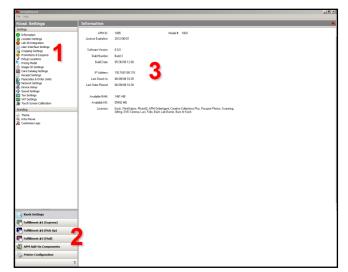


Figure 1: Setup Wizard Panes

and Licensing

Once the Setup Wizard has opened, the **Kiosk Settings** section is selected in the category navigation pane, and **Kiosk Information** is shown in the customization pane. This provides an overview of the software version, APM ID number, basic system information, and which licenses are activated for use on the kiosk.

The APM software version and licensing should be checked for requirement compliance before installing the EQ Gifting products. Please note the red boxes in Figure 2 for locating your software version and confirming that the "gifting" license is available.

Kiosk Settings	Information			
Settings				
1 Information	APM ID:	1018	Model #	2701
Location Settings Lab 50 Integration User Interface Settings	License Expiration:	2009/04/01		
ty Cropping Settings	Software Version:	6.0.0		
Promotions & Coupons	Build Number:	Beta 28		
📌 Pickup Locations 📎 Pricing Model 🚯 Image CD Settings	Build Date:	05/05/08 12:00		
Card Catalog Settings Receipt Settings	IP Address:	192.168.168.94		
Passcodes & Order Limits	Last Check-In:	05/22/08 18:06		
Network Settings Device Setup) Sound Settings	Last Order Placed:	05/13/08 09:32		
Tax Settings	Available RAM:	821 MB		
M VAT Settings	Available HD:	25750 MB		
Branding	Licenses:	Kiosk, PrintStation, Photol0), Creative Collections Plus, F ab Burner, Burn At Kiosk, Ko	Passport Photos, Scanning, Gifting, DVD
G Theme Thtro Movie Customize Logo				
Kiosk Settings				
Fulfillment #1 (Express)				
Fulfillment #2 (Pick Up)				
Fulfillment #3 (Mail)				
APM Add-On Components				
A Printer Configuration				

Figure 2: Kiosk Information Screen



Installing the EQ Gifting Product Content

Once you have verified that the EQ Gifting license is available and the kiosk version is sufficient, you will need to download and install the EQ Gifting Product Content. To do this you will use the new Lucidiom Downloader tool. This is the same tool that you may have already used to get the Creative Content for the v6.0 update itself:

Note: Even if you already have a copy of the Lucidiom Downloader, please download it again. The link provided here points to the latest version, which is required for the EQ Gifting content download.

The tool can be downloaded from: <u>http://www.lucidiom.com/support/LucidiomDownloader.exe</u>

If you install the tool on a machine other than an APM, the first time you run it you'll be asked for your APM ID and version number. Enter the APM ID from any one of your kiosks, and enter "6.0.0" for the version number.

To download the content:

- 1. Click on the "Update List" button. All available downloads will appear in the "Available Downloads" list.
- 2. Select the EQ Gifting file.
- 3. Click on Begin Download. The job will move to the "Downloads" list where you can monitor progress as the file is downloaded in the background.

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	6.0 Creative Content, Disc 2	6.0 Creative Content Installer, Disc #2	2 (Spring 2008, Rev	101)	5/14/2008	· · · · ·
	6.0 Creative Content, Disc 3	6.0 Creative Content Installer, Disc #3			5/14/2008	
	6.0 Creative Content, Disc 4	6.0 Creative Content Installer, Disc #4		101)	5/14/2008	
	EQ Gifting, Spring 2008	EQ Gifting Content Installer, Spring 20	08		6/11/2008	
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ina 2008 Re	ev 101 Disc 1 6.0 Creative Conten	t Installer, Disc #1 (Spring 2008, Rev 101)	05/14/08	COMPLETED	3.86 GB	3.86 GB
			100 C C C C C C C C C C C C C C C C C C		0.000.000.000	

Figure 3: Lucidiom Downloader

- 4. By default, the content will be downloaded to your computer's desktop. The file will only appear on the desktop once the download is complete.
- 5. Once the file has downloaded, extract the zip files to a new folder on the C: drive (Ex. C:\GiftInstaller)

To install the EQ Gifting product content, please do the following:



- 1. Close the Setup Wizard if it is running. This will re-launch the kiosk software.
- 2. Access the looping intro movie.
- 3. Touch the lower-left corner of the screen to access the hidden menu.
- 4. At the next screen, press 1 2 3 4 (substitute your actual passcode) and then press the Enter button.
- 5. Choose the Quit APM Software button on the first menu.
- 6. Open the APM Hardware Attendant and press the Quit button to close all running APM software applications.
- 7. Double-click on the Setup.exe installation file within the folder you extracted.
- 8. Once the installation has completed, double-click on the APM Hardware Attendant link on your desktop to relaunch the kiosk software.
- 9. Re-open the APM Setup Wizard using the same instructions as above, and continue with the steps below.

Modifying the Location Settings

This next step is a critical part in making sure that each order gets back to the location where the order was placed. If you are from a retail chain with multiple locations, this is one of he most crucial steps to ensure proper setup at each location.

Note: This is an important step! Failure to enter your store location information correctly will cause EQ Gifting orders to be shipped to the wrong address.

- 1. Click on the Location Settings option in the Primary Navigation Pane.
- 2. Use this screen (Figure 4) to enter the address information for the location that you want the EQ Gifting orders to be shipped back to upon completion.
- 3. Repeat this for each APM at each location ensuring that all the information is completely and correctly filled out.

Settings Difformation Location Settings Lob Di Integration User Interface Settings Toropong Settings Promotions & Coupons Pricing Model Image CD Settings Card Catalog Settings Recept Settings Persona Model Persona Solver Settings Persona Model Device Settings Device Set	Store Name: Store Number: Address: City:	PhotoWorld 1234 1234 8130 Main Street		
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	ZIP/Postal Code:	22123		
Sound Settings Tax Settings	Country:	United States	•	
VAT Settings Touch Screen Calibration	Phone:	703-555-1234		
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Finance Theme Them	Main Contact Name:	John Doe		
Kiosk Settings	Main Contact Email:	jdoe@photoworld.com		
🕅 Fulfillment #1 (Express)				
Fulfillment #2 (Pick Up)				
Fulfillment #3 (Mail)				
APM Add-On Components				
Printer Configuration				

REQUIRED FIELDS:

- Store Name
- Store Address
- Store City
- Store ZIP
- Store Contact Name
- Store Contact email OR Store Telephone Number

Figure 4: Location Settings 1



Enabling and Configuring EQ Gifting

Once the EQ Gifting content is installed, the component must be enabled using the Setup Wizard. Follow the instructions above for accessing the Setup Wizard. Once open:

- 1. Click on the **APM Add-On Components** option in the **Category Navigation Pane**.
- 2. Click on the **Gift Settings** option in the **Primary Navigation Pane**.
- 3. Click on the **Enable Gifts Add-On** checkbox at the top of the **Customization Pane.**

General Settings

After the EQ Gifting add-on has been enabled, you can edit the general gifting settings on this same screen (Figure 4), as described below:

• **Require approval for gift orders:** With this option enabled, a store employee will need to enter a code (order limits code) before the customer's order can be submitted for processing.

Note: The fulfillment must be a fulfillment that is enabled.

APM Add-On Components	Gift Settings		
Template Products			
Creative Collections / Luci Creative Collections / Luci SetAcage Prints Git Settings Git Products Template Localization Folo	Settings Cable Gilts Add On Default Fulfilment to use: Customer Delivery Options:	Require Approval for Gift Diders pickup Both Pickup &	
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Fulfilment #1 (Express)	-		
Fulfilment #2 (Pick Up)			
Fulfillment #3 (Mail)			
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1			

Figure 5: Gift Settings

- Default Fulfillment to use: Select the default fulfillment to be used in the APM software for gifting products.
- **Customer Delivery Options:** Select the delivery options available to the customer for receiving their gift item. The options are **In-Store Pickup, Mail Delivery**, or **Both Pickup & Delivery**. If the option **Both Pickup & Delivery** is selected, the customer will be prompted to select from both options while placing their gift order.

In Store Delivery Options:

- **Do Not Charge for In Store Delivery:** No charge will be applied for orders that are picked-up at the store.
- Charge same Gift-Specific S&H Fees for In-Store Pickup as for Ship-to-Customer Delivery: The shipping fee entered for each product under the Gift Products section will be applied regardless of whether the order is mailed or picked-up at the store.
- Charge Flat Fee for In-Store Pickup: A flat fee will be charged for picking-up items at the store instead of the shipping charges per gift item.



Customer Information

After the EQ Gifting add-on has been enabled, you will need to make sure that you have the required customer fields enabled in the fulfillment chosen in the instructions above to ensure proper processing.

- 1. Go to the fulfillment you have chosen in the setup wizard
- 2. Click on Order Settings
- 3. At a minimum make sure that First Name, Last Name, and Phone Number are checked.
- 4. Proceed to the next section for configuration and pricing of gifts.

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File Help	
Fulfillment #2 (Pick Up)	Order Settings
Settings	
Main Options Order Settings	Prompt customer for name & address information. Required Fields
Kiosk Text Settings	🔽 First Name 🚤
Fulfilment Title Fulfilment Description Vorder Completion Text	City State / Province 3
Products	ZIP / Postal Code
Add Product(s) 4x6 (Quick Order Product) 5x7 Prints 8x10 Prints	✓ Phone Number Email Address
Bx12Prints Bx12Prints Sx12Prints Sx15Exclusive Card 4x 4 Exclusive Card 4x 4 Exclusive 4x 8 Exclusive 4x 8 Exclusive 4x 9 Exclusive 5x 5 Exclusive Card	Cucick Order Options C Choose Photos Only C Choose Photos and Print All
S x 7 Exclusive S x 7.25 x 7.25 (Envelope) Exclusive Card S x 6 Exclusive Card	Optional Screens Offer customer choice of pickup locations
Kiosk Settings	
Fulfillment #1 (Express)	
Fulfillment #2 (Pick Up)	1
Fulfillment #3 (Mail)	
APM Add-On Components	
*	

Figure 7: Setup of Required Customer Information

Gifting Product Configuration

Once the general settings have been configured, click on **Gift Products** in the **Primary Navigation Pane** and follow the instructions below to configure each EQ gifting product, as shown in Figure 5:

- 1. Select a template from the list. Double click to enable/disable it in the software.
- 2. Below the table, enter the **Base Price** for the selected gift as well as a **Shipping Fee**. The shipping fee will be used for any orders that are delivered via mail, or if you have enabled the option to use the same fee regardless of delivery type in the **Gift Settings** section.
- 3. You may also change the **Name** and **Description** that appear in the software for each product by editing the corresponding field.
- 4. Check the **Enable Quantity Pricing for this product and fulfillment** if quantity discounts apply. Enter the quantity and price for each price break. For more details on quantity pricing, see Chapter 5 of the APM software manual.

Setup/Wizard									_10
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Figure 8: Gift Products



Order Tracking

Once an EQ Gifting order has been placed by the customer, the order may be tracked at the following website:

http://www.eqgifttracker.com

To access your account information, please log in with the information provided during the gifting setup process. If you do not know your account login information, please contact the Lucidiom sales department or email <u>gifting@lucidiom.com</u>. Please provide your name and store when you do.

Searching for an Order

Once logged-in, the Search page will be displayed with various options for tracking orders, as detailed in Figure 7:

Retailer Order: The APM order number, as shown on the printed receipt. This is the primary means of tracking an order.

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	Portal Manage User Passwo		this computer?				

Figure 9: Login Page

SKU: The SKU/Product ID of the ordered gift product. A list of product IDs can be viewed in the **Gift Products** section of the Setup Wizard, as detailed above.

First Name, Last Name, and Email Address: This is the information as entered by the customer during the ordering process on the APM.

Note: It is important to require each of these fields in the chosen fulfillment, as selected in the **Default Fulfillment to use** field under **Gift Settings**. For more information on customer information

Affiliate: The name of the store where the order was placed, as entered in the Location Settings section of the Setup Wizard, as detailed above.

Status: This dropdown menu can be used to filter the search results based upon any criteria in

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Last Name Email Address Manufacturer Retailer	Lucidiom	_	Portal Order Date Ship Date	< Select > < Select > Order Date		-	CH, GET CSV	to	

the list. For example, this field can be used to show only shipped orders.

Retailer Job: Leave this field blank, as it is not applicable to the search process.

Manufacturer Order #: The internal order number assigned by the fulfiller. Keep in mind that this is different than the retailer order number.

Retailer Order Date: The date the order was placed in the APM software by the customer.



Portal Order Date: The date the order was received by the manufacturer and entered into the system.

Ship Date: The date the order was shipped back to the store after being fulfilled.

Figure 10: EQ Portal Search

Sort By: Use the dropdown menu to sort search results based upon the criteria in the list. Use the **Ascending** or **Descending** radio buttons to toggle how the results should be displayed.

Note: For the three date fields, use the dropdown menu to filter the search results based upon the criteria in the list. This selection will populate the date fields to the right. You can also edit the date fields manually, if desired.

Once all search criteria has been entered, press the SEARCH button to perform the search. Alternatively, you can press the SEARCH, GET CSV button to create a comma-separated value file of the results that can be read in such programs as Microsoft Excel.



Figure 11: Search Buttons

After the search is performed, a list of orders meeting the entered criteria will be displayed below. Each line will show the retailer order number, customer name, order date, status, and an overview of the products in each order. To see a detailed view of the order information, click on the **DETAILS** button for the order you wish to view.

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10388383		Lucidiom		1001		Centri	ics		11/27/2007 1	7:12	Shipped (80) Priority 0	

Figure 12: Search Results



Order Details

The order details page gives a concise overview of every aspect of the order, including the images used in the order and any applicable shipping information. Click on the **Status** link to see a detailed history for this particular order. Clicking on the **Customer** link gives details about the ordering customer's billing information, as entered in the APM software at the time of order.

If the order has been shipped, scroll to the bottom of the page and click the **Tracking Number** link. This will link to an external site, depending on the carrier used, where you can track the shipment.

Each line item will give detailed information about the

 Image: State of the second second

Figure 13: Order Details

products in the order. You can click on the **Filename** underneath each image to download a copy of the picture, if necessary. Multiple line items will be displayed if more than one product was ordered.