Lucidiom Tech Notes:
EQ Gifting Configuration

Table of Contents

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
1.6	06/10/08	Third Revision	Russ McIver
1.7	8/17/08	Fourth Revision	Russ McIver
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.
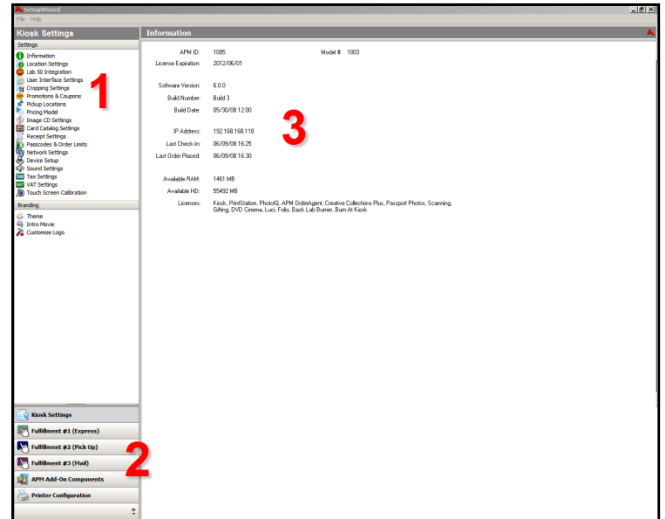
Confirming the APM Software Version and Licensing

Figure 1: Setup Wizard Panes

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.
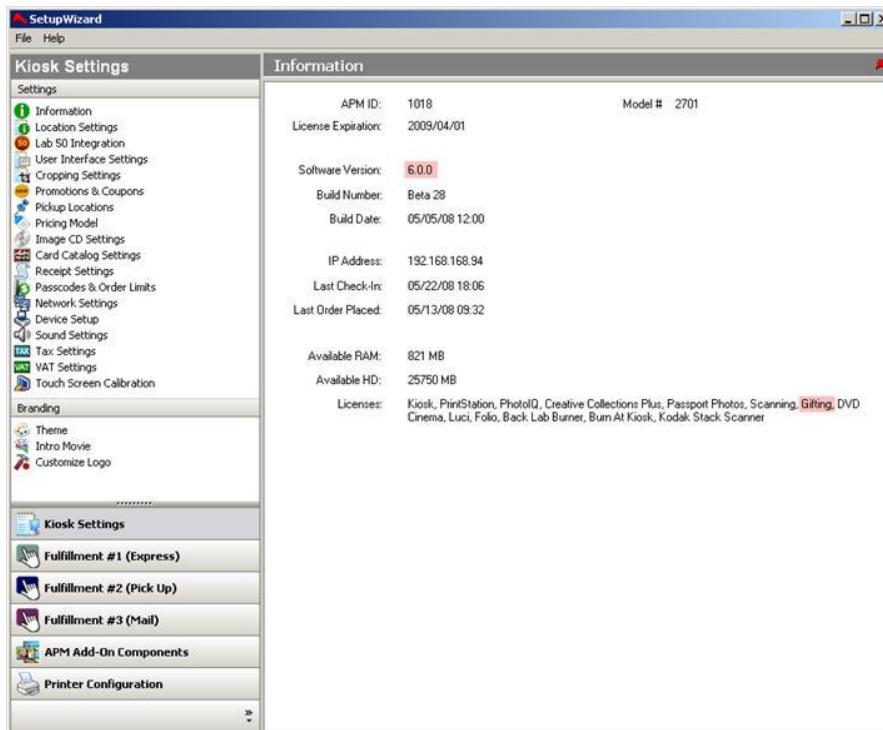
Figure 2: Kiosk Information Screen

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: http://www.lucidiom.com/support/LucidiomDownloader.exe

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.
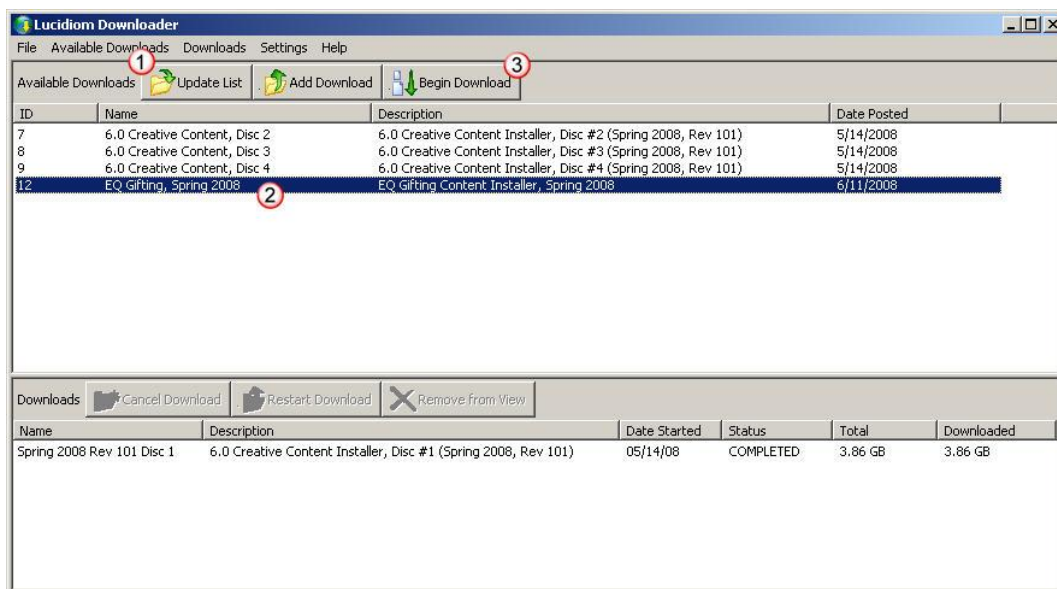

Figure 3: Lucidiom Downloader

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)

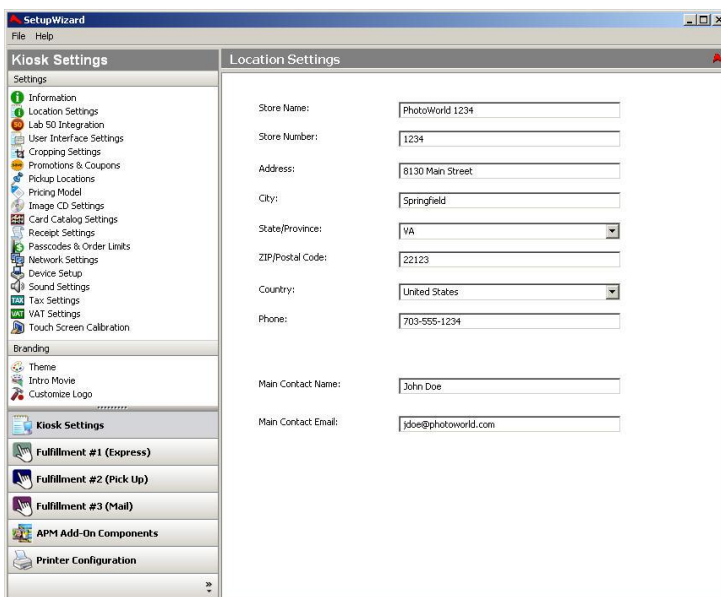To install the EQ Gifting product content, please do the following:

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 re-launch 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.

Figure 4: Location Settings 1

REQUIRED FIELDS:

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

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:

Figure 5: Gift Settings

- **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.

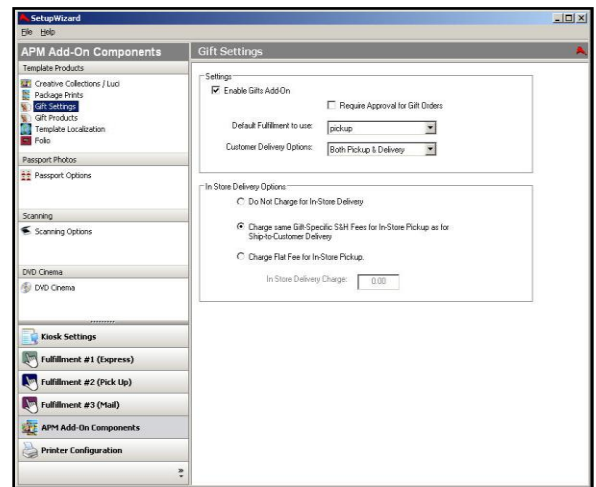> **Note:** The fulfillment must be a fulfillment that is enabled.

- **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.

Lucidiom

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.
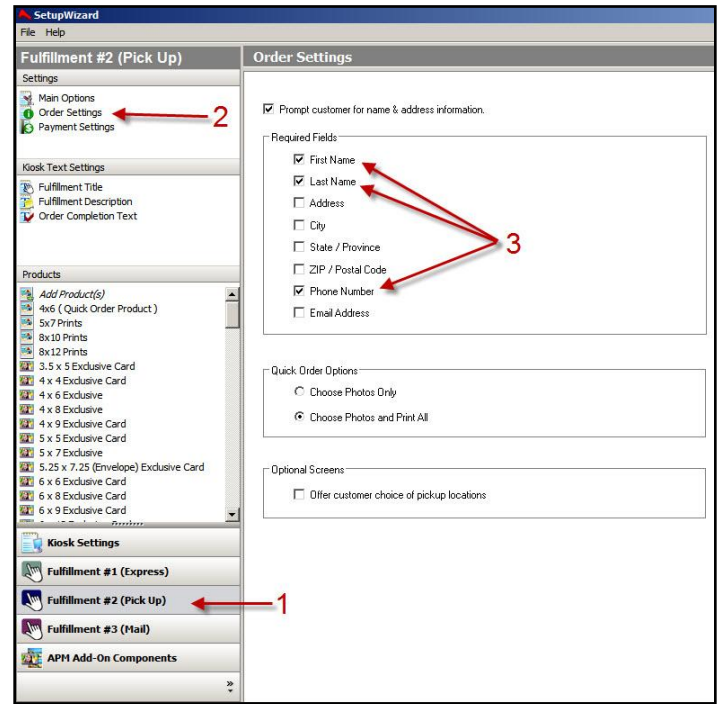4. Proceed to the next section for configuration and pricing of gifts.

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.
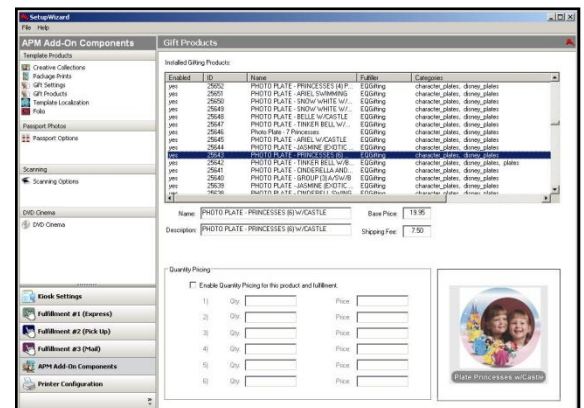

Figure 8: Gift Products

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 gifting@lucidiom.com. 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.

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 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.
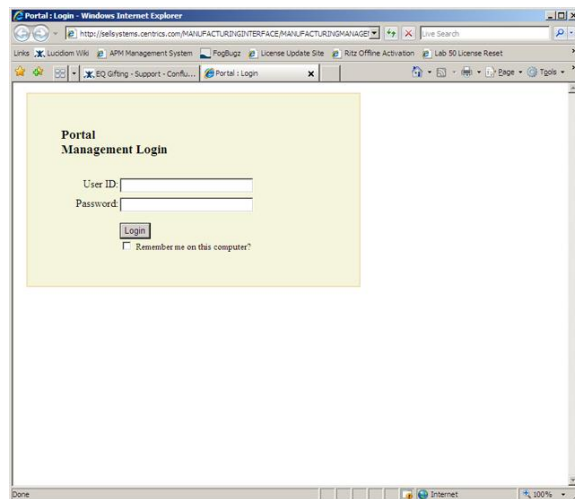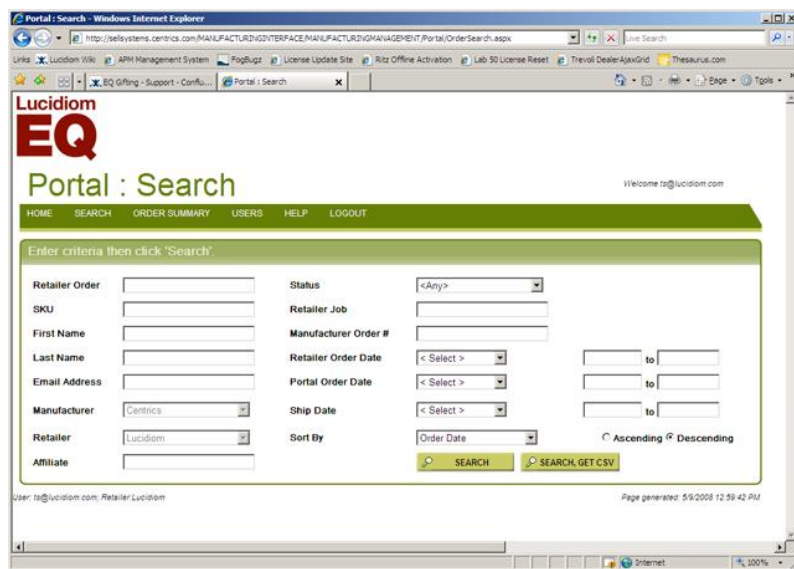
9

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.

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.

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.

Figure 13: Order Details

Each line item will give detailed information about the 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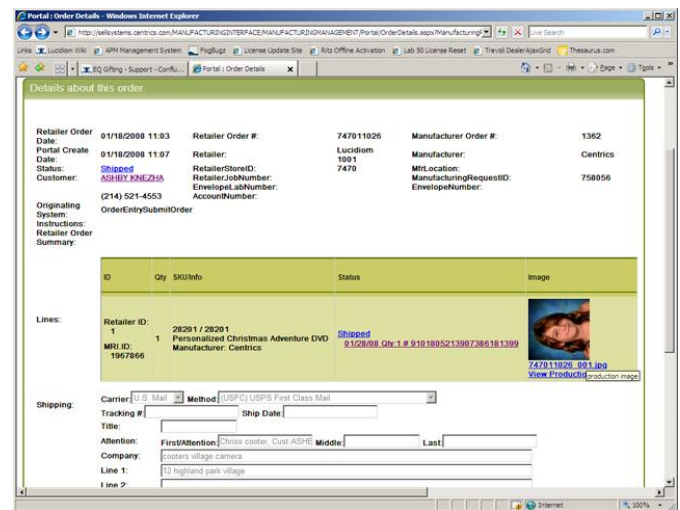 displayed if more than one product was ordered.