

flexEngage/Retail Pro V9 Interface v2.x Plugin Installation and Configuration Guide

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PART 1: FLEXENGAGE DIGITAL RECEIPTS INSTALLATION

WHAT'S NEW IN THIS VERSION

This version of the plugin includes the following new features that are described in this document:

- Emailing a former receipt from within Retail Pro.
- Queueing of receipts in the event of a communication error or Internet outage.
- Advanced Categorization for adding a product registration link to an item on the email receipt.

UPGRADING FROM A PREVIOUS VERSION

If you are upgrading from a version of the flexReceipts Plugin for Retail Pro 9 that is **before version v1.13.18**, you should unregister the previous **flexEngage92.dll** that is in the Plugins folder. You will need to manually reregister the new DLL after the new plugin is installed. It is also a best practice to move the old plugin DLL to a backup location in the event you need to roll back to a previous version.

SYSTEM REQUIREMENTS

You must meet the minimum memory and CPU requirements to run Retail Pro 9. In addition, these are the requirements for using the flexEngage plug:

Operating system	Windows 7 or higher
Network	A reliable broadband internet connection
Retail Pro	Retail Pro version 9.30.0.127 or higher

Note: If the system does not meet the requirements above, additional support and troubleshooting may be required.

INSTALL FILES

All files needed for installation are in the supplied zip file flexReceipts2RPro9.v.vv.zip where v.vv is the version number. The zip file contains:

FILENAME	DESCRIPTION
flexEngageRProV9Setup_x.xx.xx.exe	Installer (x.xx.xx would be replaced with the plugin version #).
FRRPro9PluginInstall_vx.x.PDF	Installation guide (vx.x would be replaced with the plugin version #).
FRRetailPro9PluginCashierOrientation.pdf	1-page flexEngage overview for cashiers

INSTALLATION STEPS

Installation is performed at the Retail Pro HQ and each store that will be using flexReceipts.

- If a computer is running Retail Pro from it's local hard drive, it needs to have the plugin installed and configured.
 - Main, Servers, Standalone Workstations
 - If other machines are running Retail Pro from this server via a mapped drive, the installation on this server must be done using a similarly mapped drive (same letter and path) as the workstations using it (i.e., If other workstations are mapping a drive to this server using 'R:\Retail9' to run Retail Pro,

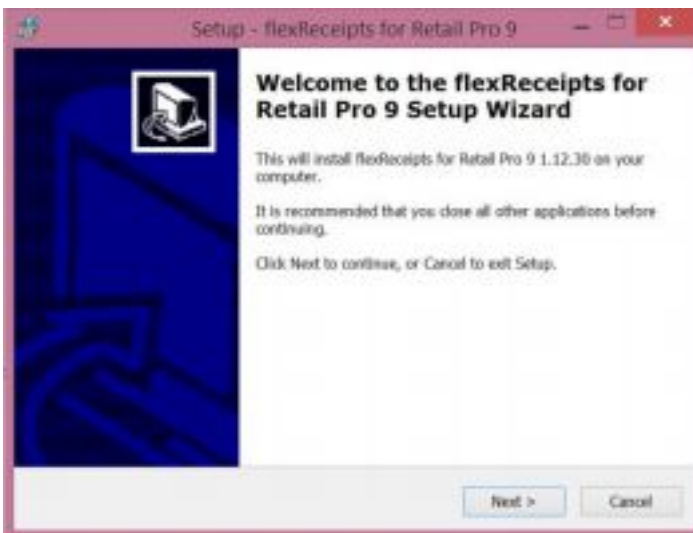
then the server must also have a drive R: mapped to itself so that the plugin can be installed in 'R:\Retail9')

- If a workstation is running Retail Pro from a mapped drive to another computer (server or Main), the workstation only needs to have the plugin configured after it is installed on the server.

STEP 1: Extract the contents of the zip file to a directory.

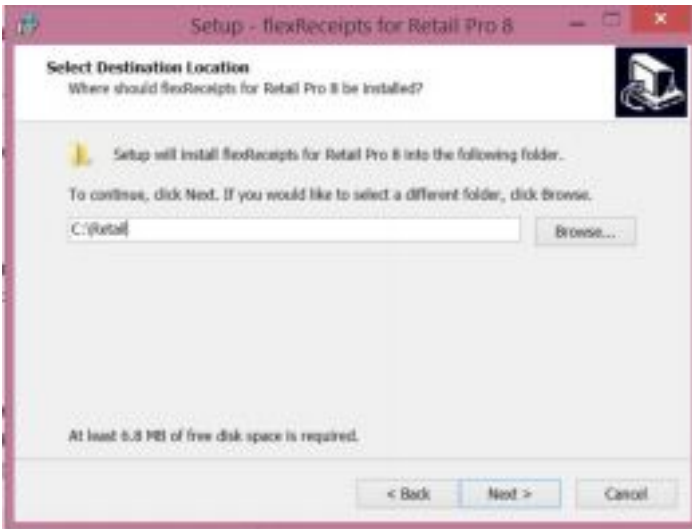
STEP 2: Run the flexReceiptsRProV9Setup_x.xx.xx.exe program as an Administrator. Right-click the executable and choose "Run as Administrator".

STEP 3: From the welcome screen, click "Next".



STEP 4: The installer should recognize the drive and directory where Retail Pro is installed and pre-populate it in the next screen. If needed, enter a different path or click the "Browse" button to browse to the Retail Pro installation directory.

Click "Next" to continue.



STEP 5: A confirmation screen will appear letting you know that the plugin is ready to install.

Click "Install" to continue.

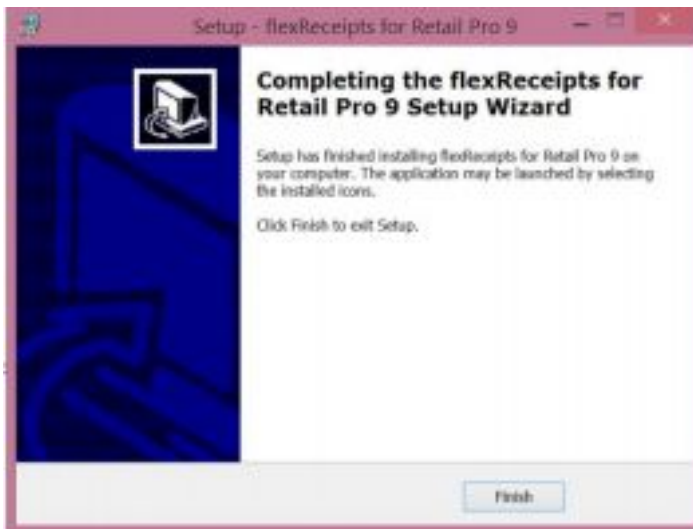
The installer will copy the following files into the directories listed in the table below.

FILE	DIRECTORY
flexReceipts92.dll	/RetailPro9/Plugins
flexReceipts92.mnf	/RetailPro9/Plugins
libeay32.dll	/RetailPro9
ssleay32.dll	/RetailPro9
FRQueueService.exe	/RetailPro9
FlexRcpts Folder	/RetailPro9
Queue Folder	/RetailPro9/FlexRcpts/Queue

The following files are created by the plugin during configuration	
FlexMain.dat	/RetailPro9/FlexRcpts
FlexMain.ini	/RetailPro9/FlexRcpts
FlexStore.ini	/RetailPro9/FlexRcpts
The following Windows Registry Entry is added for the Queue Service during installation	
HKEY_LOCAL_MACHINE/Software/FlexReceipts/FRQueue Service/ServiceDirectory	The full path to the queue. i.e. C:\RetailPro9\FlexRcpts\Queue

STEP 6: You will see files being copied and upon successful completion, the final window will appear to confirm that this installation is complete.

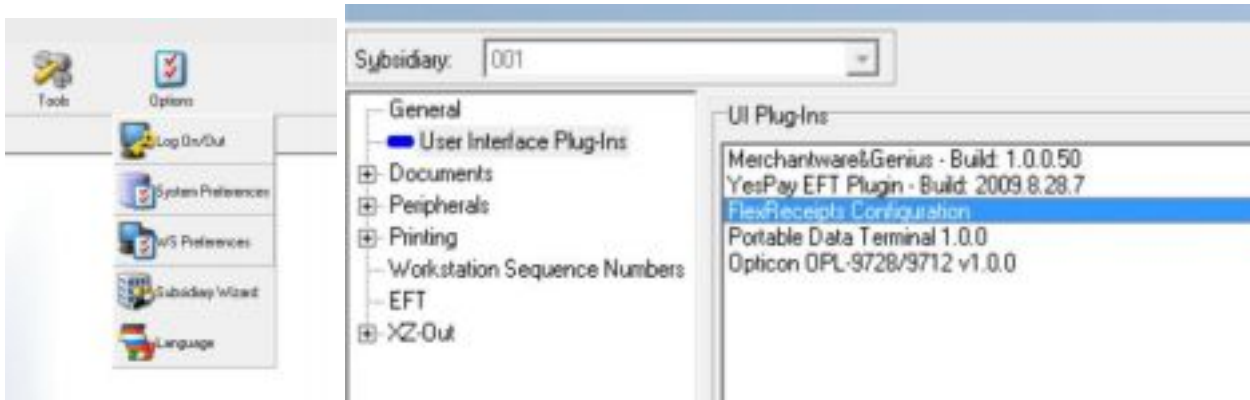
Click "Finish" to complete the installation.



PART II: CONFIGURATION

Configuration is done at the HQ and each store prior to using flexEngage.

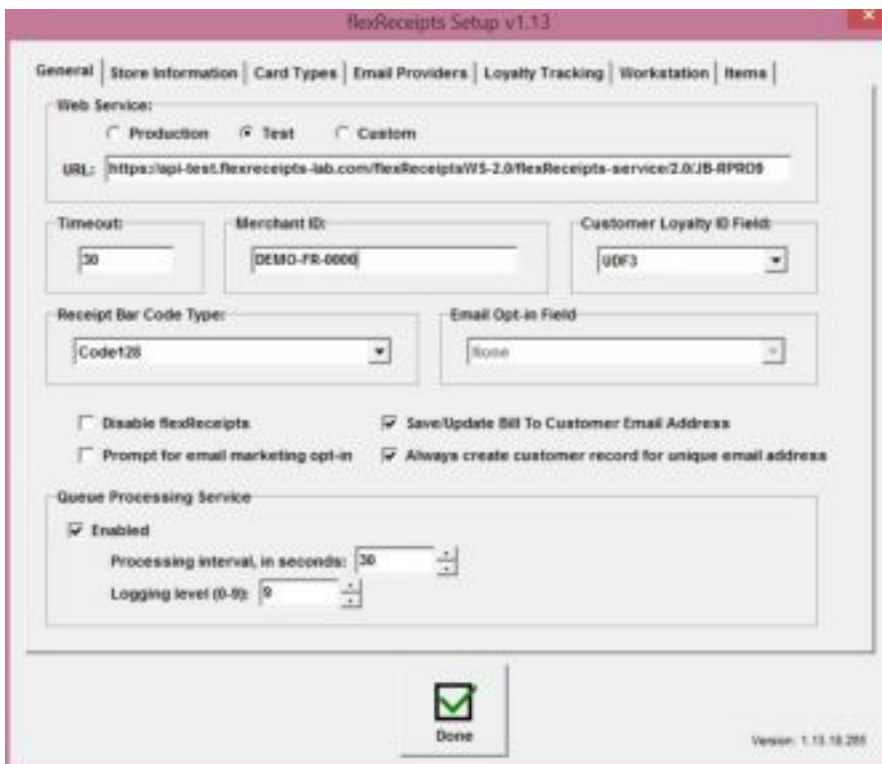
From “WS Preferences”, select “User Interface PlugIns” and double click on “flexReceipts Configuration”.



The Setup screen will be displayed. It has 7 tabs: General, Store Information, Card Types, Email Providers, Loyalty Tracking, Workstation, and Option Fields. Do not click “Done” until all tabs have been filled out. Clicking “Done” will save the settings of all tabs and close the Setup screen.

GENERAL TAB

This tab defines global information about the plugin and is required to communicate with flexEngage.



WEB SERVICE

This section has 3 radio buttons for setting the URLs to use to communicate with flexReceipts. It also selects the active URL. The Test Environment URL is pre-populated and selected. flexReceipts will provide you with the Production URL at the time of deployment.

IMPORTANT: The URL selected at the Main will be used at Remotes as well.

TIMEOUT

This field sets a timeout in seconds. It is used in the event of communication issues. Increase this timeout if you have slow or unreliable connections.

MERCHANT ID

This field sets your unique Merchant ID provided by flexReceipts.

CUSTOMER LOYALTY ID FIELD

This field notifies the flexReceipts plugin what User Defined Field (UDF) you use to store a Loyalty Number in your customer records (if applicable). If you are not using a Loyalty Number, select "none".

RECEIPT BARCODE TYPE

This field defines the type of barcode that is printed on your digital receipts. Leave it empty if you do not want a barcode. Select "Code 128" if you do not have a barcode type preference.

DISABLE FLEXRECEIPTS

This checkbox disables the flexReceipts plugin for Retail Pro.

SAVE/UPDATE BILL TO CUSTOMER EMAIL ADDRESS

This checkbox adds/updates the email address provided by the customer at checkout to the customer record associated with the active invoice. The customer must be selected and added to the invoice prior to tender. Then if the customer requests a digital receipt, the captured email address will be added to the customer record.

PROMPT FOR EMAIL MARKETING OPTIN

This checkbox prompts an additional checkbox to appear on the receipt type selection popup at checkout for capturing the customer's decision to optin their email address to your email marketing. The status of whether the customer has opted in or not will be stored in the Customer record field selected in the "Email Optin Field" dropdown.

EMAIL OPTIN FIELD

This dropdown defines the field to be used to store the email optin status for customers, if the “Prompt for email marketing optin” is checked. Note: Please see the section titled “UDF Fields” at the end of this document before using a UDF field for this field.

ALWAYS CREATE CUSTOMER RECORD FOR UNIQUE EMAIL ADDRESS

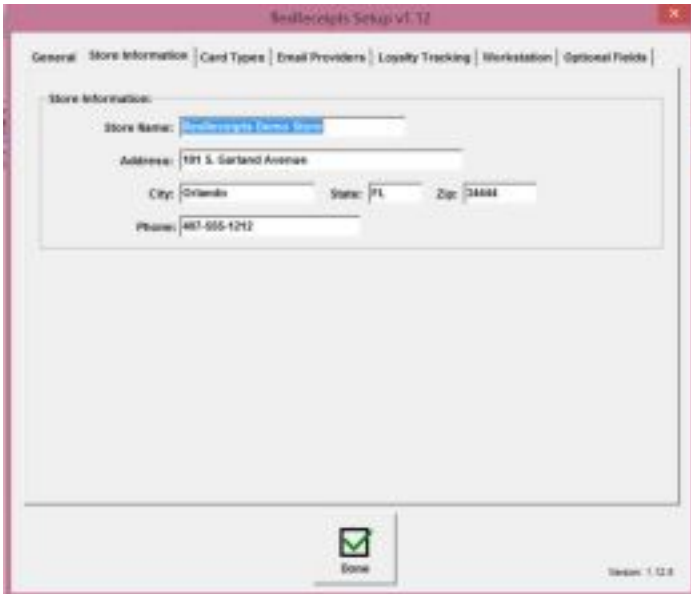
This checkbox creates a new customer record every time an email address is entered for a digital receipt that does not match an existing customer. If you have any additional required customer fields (First Name, Last Name, etc) the plugin will prompt the cashier to add the required information needed to create a new customer record before proceeding. The new customer will be added to the invoice.

QUEUE PROCESSING SERVICE

When the “Enabled” box is checked, the plugin will queue (save) receipts requests in the event of a communication or Internet outage and will automatically resent the receipts when communication is reestablished. Note: Please see the section titled “Configuring The Queue Processing Service” at the end of PART II of this document for more detailed instructions on using this feature.

STORE INFORMATION TAB

This tab defines the Store Name, Address, City, State, Zip, and Phone that will appear on the top of receipts. All information is required and whatever is entered will display on the digital receipts.



Receipts Setup v1.12

General | **Store Information** | Card Types | Email Providers | Loyalty Tracking | Workstation | Optional Fields

Store Information:

Store Name:

Address:

City: State: Zip:

Phone:

☒ Done

Version: 1.12.0

CARD TYPES TAB

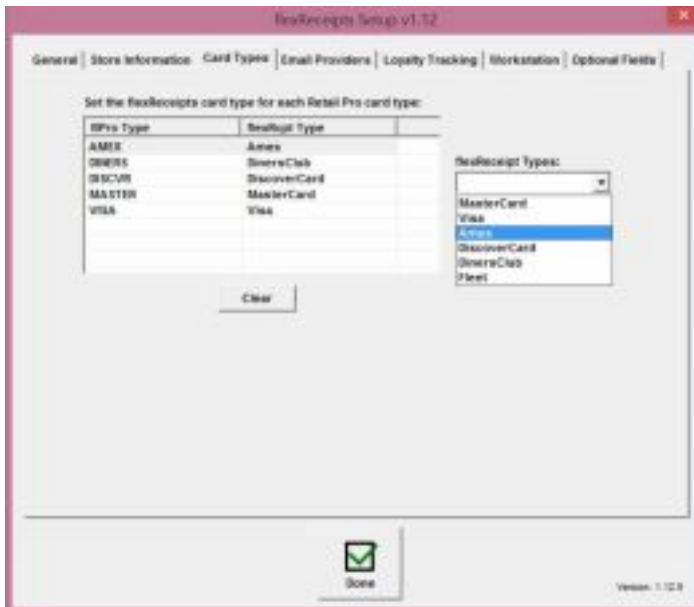
This tab notifies flexReceipts of the credit card names used by your Retail Pro system.

For each credit card listed in the “RPro Type” column, you need to set the correct “flexReceipt Type”.

Click on the credit card type in the “RPro Type” column and then select the correct card type from the “flexReceipts Types” dropdown.

Repeat this for each credit card type listed in the “RPro Type” column.

If there is no flexReceipts credit card name listed for a Retail Pro credit card name, do not enter it.



EMAIL PROVIDERS TAB

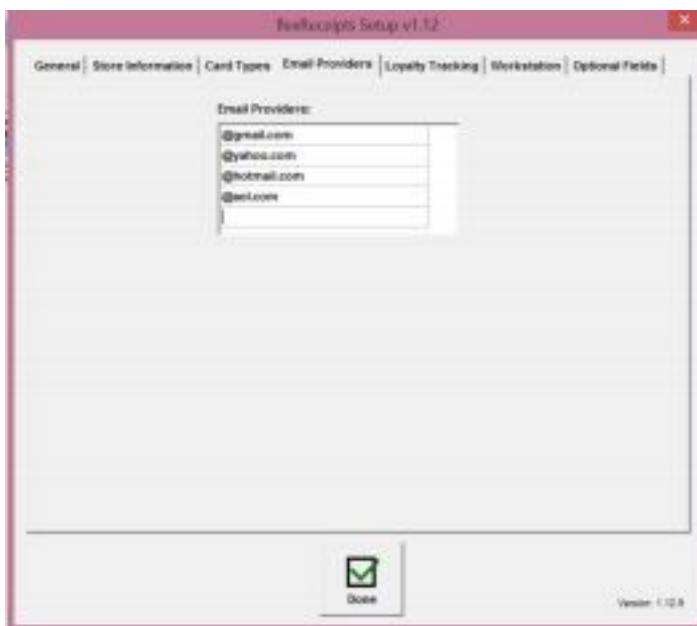
This tab allows you to define frequently used email domains to help speed email address entry time and minimize typing errors.

Each email domain entered in the “Email Providers” table will be available on buttons to be used when capturing customer digital receipt email addresses.

Up to 5 email domains can be entered.

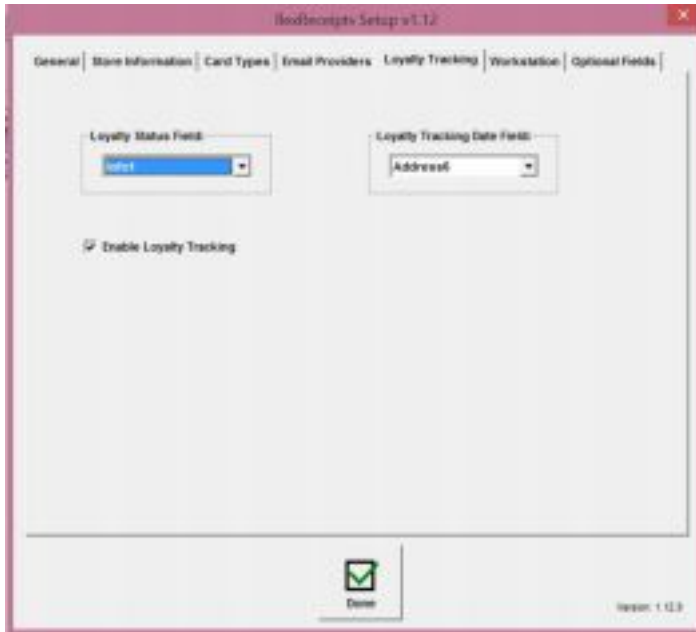
Enter the “@” plus the full domain name (e.g., @gmail.com, @hotmail.com).

HINT: Whatever you enter in the table will be populated in the email address field during checkout. So you could use one of the table entries for “.com” to minimize having to type “.com” for email domains not in the table.



LOYALTY TRACKING TAB

This tab enables and configures loyalty membership tracking in the flexReceipts plugin.



ENABLE LOYALTY TRACKING

This checkbox enables the loyalty tracking feature and a checkbox is added to the receipt selection popup at checkout

to record whether or not the customer would like to participate in your loyalty program.

LOYALTY TRACKING STATUS FIELD

This drop down determines which field to use to track whether a customer has joined your loyalty program. It will store a "YES" or "NO" accordingly.

NOTE: See the section titled "UDF Fields" at the end of PART II of this document before using a UDF field for this field. **NOTE:** Select a field even if the feature is not used during initial installation.

LOYALTY TRACKING DATE FIELD

This drop down selects which field to use to store the date that the customer joined your loyalty program. It will contain a date/time stamp.

NOTE: Select a field even if the feature is not used during initial installation.

WORKSTATION TAB

This tab configures workstation specific features.



DEFAULT EFT RECEIPT PRINTING ON

This checkbox sets the default behavior of the plugin to print an EFT receipt for customer signature even if the customer requests a “Digital Only” receipt. For most workstations you want to check this setting to be “On” by default..

If you have workstations that are equipped with electronic signature capture and do not require printed EFT receipts, uncheck this checkbox so that the default EFT receipt printing is “Off” for those workstations.

Furthermore, the setting of this checkbox will determine the default state of the “Print EFT Receipt” checkbox on the flexReceipts confirmation dialog box for credit card transactions. See images below.

“Default EFT Receipt Printing On” CHECKED:

“Default EFT Receipt Printing On” UNCHECKED:



Printed (Paper) EFT Receipts

The following table demonstrates the printed (paper) receipts that can be expected with the various combinations of "Print EFT Receipt" checkboxes for each of the receipt types for credit card and non-credit card transactions.

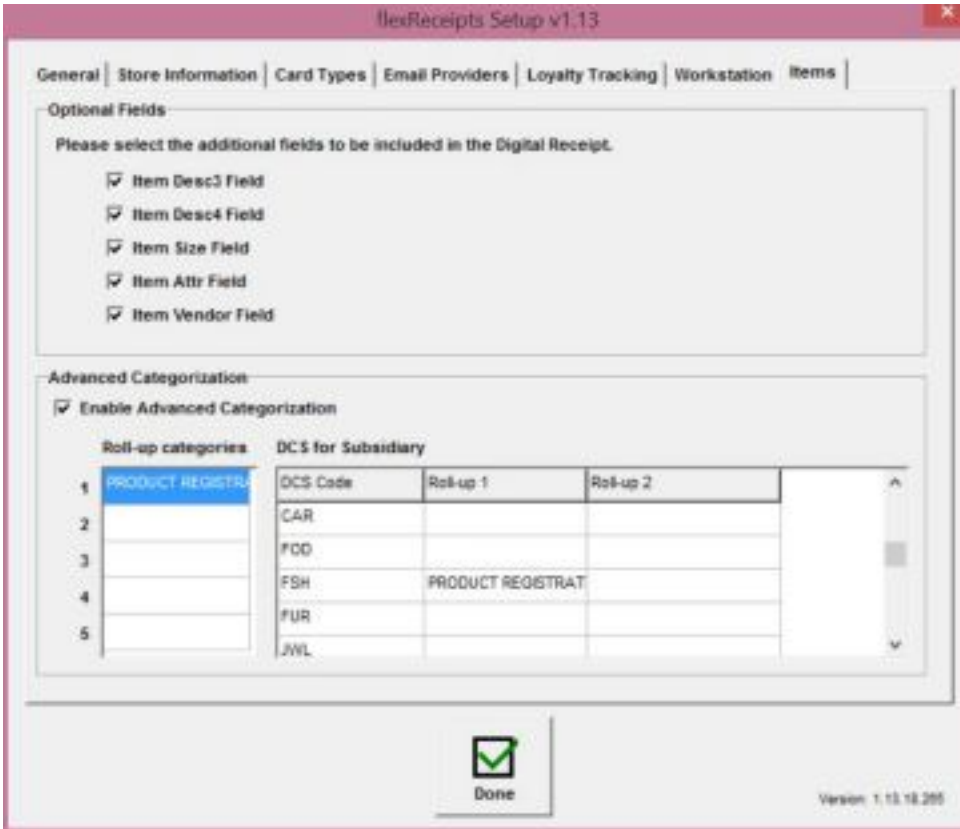
	EXPECTED PRINTED (PAPER) RECEIPTS		
	Credit Card Transactions		Non Credit Card Transactions
	"Print EFT Receipt" Checked	"Print EFT Receipt" Unchecked	
Digital Only	EFT Only	NONE	NONE
Digital and Printed	BOTH	REG Only	REG Only
Printed Only	BOTH		REG Only
No Receipt	NONE		NONE

TABLE KEY:

- **"PRINT EFT RECEIPT" CHECKED** - A credit card transaction where the "Print EFT Receipt" is checked.
- **"PRINT EFT RECEIPT" UNCHECKED** - A credit card transaction where the "Print EFT Receipt" is unchecked.
- **CREDIT CARD TRANSACTIONS** - Shows how credit card transactions will behave with the various settings.
- **NON CREDIT CARD TRANSACTIONS** - Shows how noncredit card transactions will behave with the various settings.
- **EFT ONLY** - Only an EFT receipt should print.
- **REG ONLY** - Only a Regular receipt should print.
- **BOTH** - Both a regular and EFT receipt should print.
- **NONE** - No receipt should print.

ITEMS TAB (previously Optional Fields)

This tab allows you to select additional fields that can be included on the digital receipt as well as setup Advanced Categorization for items on the receipt.



The screenshot shows the 'flexReceipts Setup v1.13' window. It has tabs for General, Store Information, Card Types, Email Providers, Loyalty Tracking, Workstation, and Items. The 'Optional Fields' section is expanded, showing a list of fields to be included in the digital receipt: Item Desc3 Field, Item Desc4 Field, Item Size Field, Item Attr Field, and Item Vendor Field. All are checked. The 'Advanced Categorization' section is also expanded, showing 'Enable Advanced Categorization' checked. Below this is a table for 'Roll-up categories' and 'DCS for Subsidiary'.

Roll-up categories	DCS Code	Roll-up 1	Roll-up 2
1	PRODUCT REGISTRAT		
2	CAR		
3	FCD		
4	FSH	PRODUCT REGISTRAT	
5	FUR		
	JWL		

At the bottom, there is a 'Done' button with a green checkmark icon and a version number 'Version: 1.13.18.285'.

OPTIONAL FIELDS

By default, the flexReceipts plugin includes all of the standard item elements including Description, Quantity, SKU, Price, and Total.

The check boxes allow you to include additional Retail Pro item-level fields on the digital receipt. Each checkbox is independent of the others. Any field that is checked will be included on the digital receipt.

The additional Retail Pro item-level fields that can be added to the digital receipt are:

- Item Desc2 (checked by default)
- Item Desc3
- Item Desc4
- Item Size
- Item Attr
- Item Vendor Field (Vendor name not code)

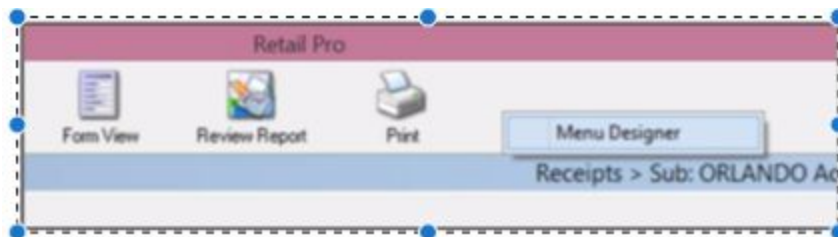
ADVANCED CATEGORIZATION

When the “Enable Advanced Categorization” checkbox is checked, the plugin will send additional information for items with selected DCS Codes to flexReceipts to enable special treatment of those items on the digital receipts. Today we support adding a product registration link next to the item. Note: Please see the section titled “Configuring Advanced Categorization” at the end of PART II of this document for more detailed instructions on using this feature.

CONFIGURING EMAIL OF FORMER RECEIPTS

This feature allows the cashier to resend an email receipt or email any former receipt right from within Retail Pro. It is even possible to email a former receipt from a transaction that took place prior to installation of the flexReceipts Plugin. All you need to do is add the Email button using Retail Pro’s Menu Designer and it just works.

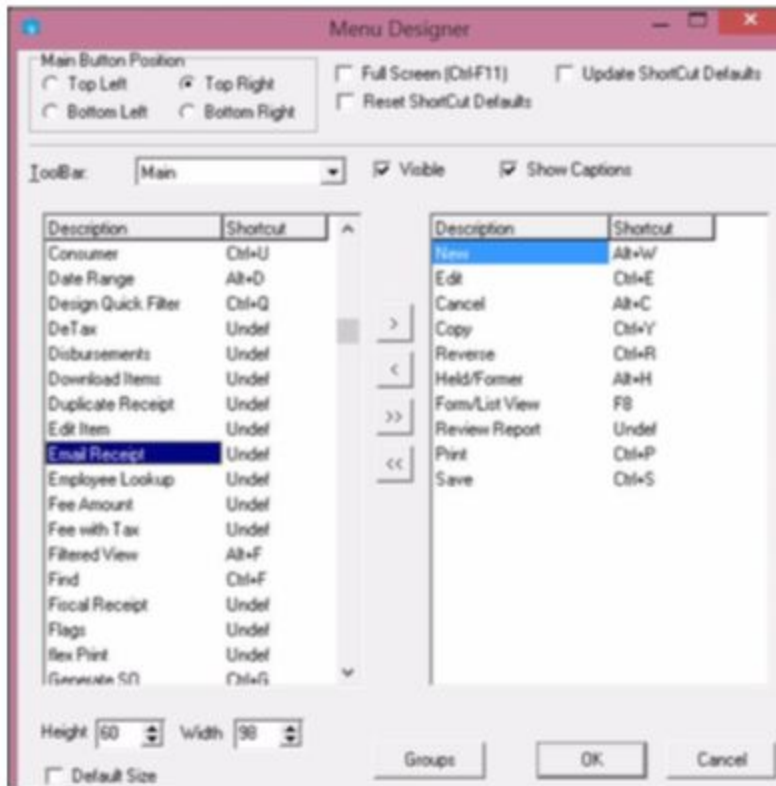
- In Retail Pro click on “Sales” → “Receipts” to bring up the receipt registry page of Retail Pro.
- Right-click in an empty area in the top menu and select “Menu Designer”

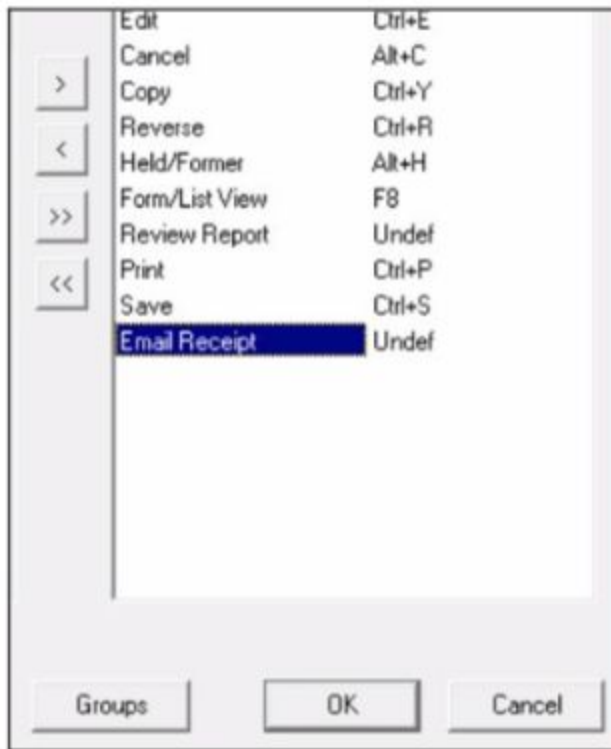


- Scroll down and select “Email Receipt” and press the “>” button to add it to the menu.

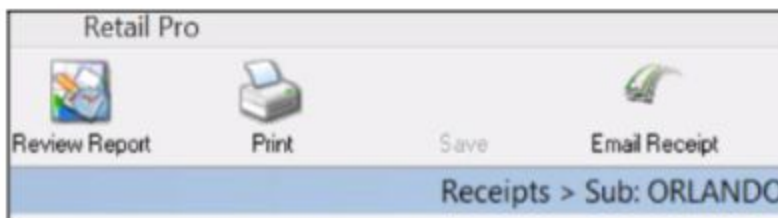


flexEngage
GO BEYOND THE SALE





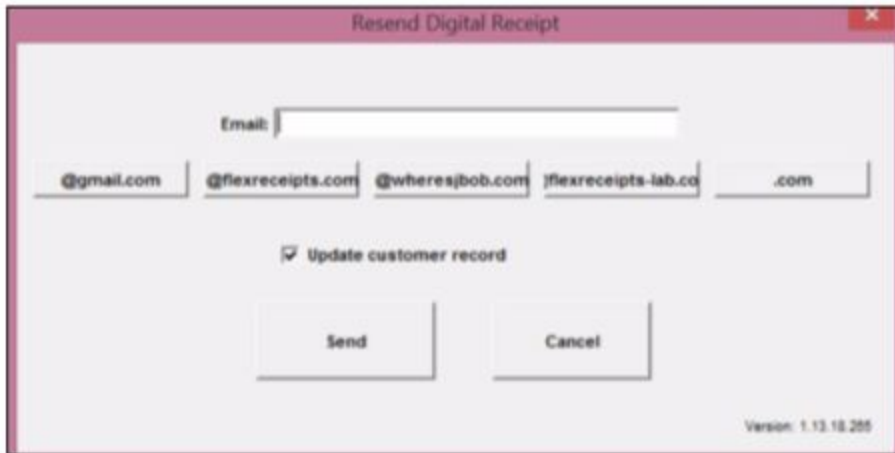
- Click "OK" to save.
- The Email Receipt button will now appear on your menu



TO EMAIL A FORMER RECEIPT

Former receipts can be emailed from the List or Form view by selecting the receipt and clicking on the "Email Receipt" button. A "Resend Digital Receipt" popup will appear allowing you to verify or enter the email address. If the receipt was previously emailed, the email address will be pre-populated. The "Update customer record" allows you to choose if you want to update the customer records if an email address is added or changed. Click "Send" to email the receipt.

These instructions are repeated in **"PART III: Operation At The Point of Sale"**.



UDF Fields

This section describes what you need to do in Retail Pro before selecting a UDF field to be used by the “Email Opt-in Field” or “Loyalty Status Field”. Since both “Email Opt-in Field” and “Loyalty Status Field” will write a “YES” or “NO” in the selected UDF fields, the UDF fields you will use need to be prepared to accept these values following these steps:

- Go to “OPTIONS > SYSTEM PREFERENCES”.
- Select “LOCAL PREFERENCES > CUSTOMERS > UDF/AUX”.
- Select the UDF field you will be using from the “Field Definitions” table.
- Enter the following in the “Field Entries” table for the selected UDF:
 - “NO” with a Value ID of “1”.
 - “YES” with a Value ID of “2”.

Note: Ensure that the “NO” and “YES” have the correct Value IDs.

- Repeat this process for any other UDF fields you will be using for the “Email Optin Field” or “Loyalty Status Field”.

Note: This is only required if you use UDF fields for the “Email Optin Field” or “Loyalty Status Field”.



flexEngage
GO BEYOND THE SALE

The screenshot shows a configuration window for flexEngage. At the top, there are icons for New, Cancel, Delete, Edit, Save, Refresh, and Copy. Below these is a 'Subsidiary' dropdown menu set to '001'. On the left is a tree view of preferences: Global Preferences (General, Locality, Currency, Calendars, Company, Regions, Planning), Local Preferences (Audit, Customers, General, UDF/Aux), Documents, Employees, Merchandise, Point of Sale, Purchasing, Reports, Stores, and System. The 'UDF/Aux' option is selected. The main area is divided into two sections: 'Field Definitions' and 'Field Entries'.

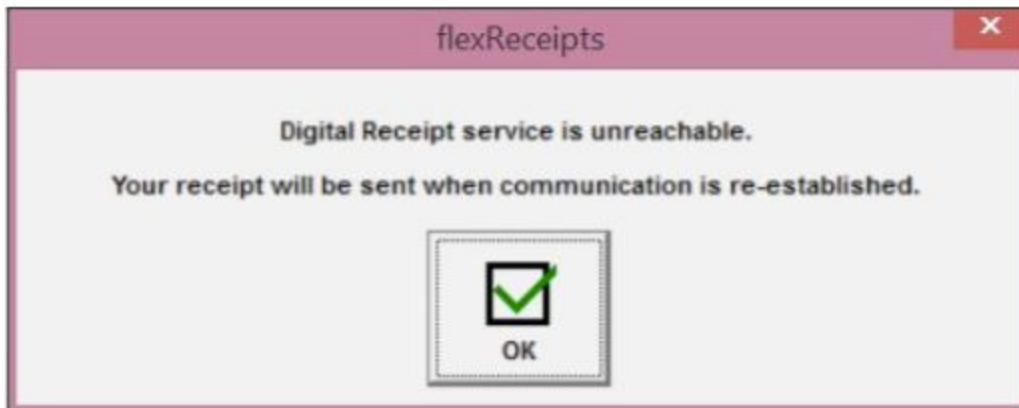
Field No	Field Name	Type	AssignedTo	Required
1		Date	UDF1	<input type="checkbox"/>
20		String	Aux12	<input type="checkbox"/>
3		String	UDF3	<input type="checkbox"/>
4		String	UDF4	<input type="checkbox"/>
5		String	UDF5	<input type="checkbox"/>
6		String	UDF6	<input type="checkbox"/>
7		String	UDF7	<input type="checkbox"/>
8		String	UDF8	<input type="checkbox"/>
9		String	Aux1	<input type="checkbox"/>

Value ID	Active	Value
1	<input checked="" type="checkbox"/>	NO
2	<input checked="" type="checkbox"/>	YES

Configuring The Queue Processing Service

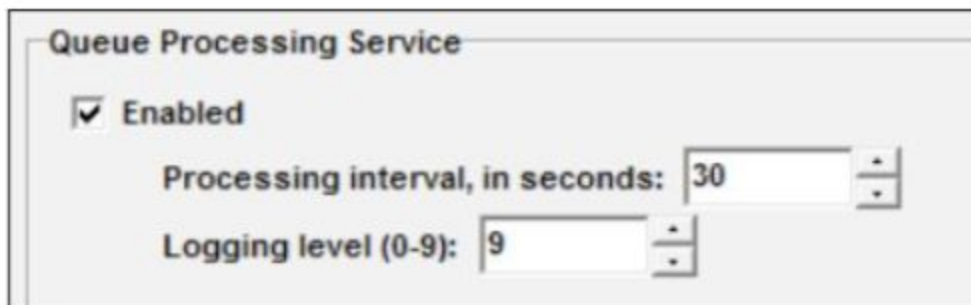
This section describes the function of the Queue Processing Service. When the Installer is run, a service is installed and started on the Server to monitor and process queued receipts. A folder is also created on the server for storing queued receipts. This feature is enabled by default and allows the plugin to queue up receipts that could not be sent because of a communication timeout.

HOW IT WORKS: During normal operation, the plugin will attempt to communicate with flexReceipts after the transaction is tendered. If the plugin cannot communicate with flexReceipts, the plugin will timeout and the following message will be displayed:



This message informs you that there will be a delay in sending the email receipt. Once “Ok” is pressed, the transaction will complete normally as if there were no error. The receipts are added to the queue and the server will send the receipt once communications are re-established.

CONFIGURATION OPTIONS: The “General” tab of the flexReceipts Setup screen allows you to configure 1) whether the service is enabled, 2) how often the server should try to resend the receipts that have been queued and 3) what level of information should be written in the logs.



Configuring Advanced Categorization

This section describes the function of the Advanced Categorization. Advanced Categorization is a feature that allows the merchant to designate specific items to be treated differently on receipts based on the DCS Code associated with it. Currently, we support the ability to have a Product Registration link added to an item on the email receipt if it belongs to a merchant defined DCS Code.

HOW IT WORKS: In the Items tab of the flexReceipts Setup, there is a section titled “Advanced Categorization” that contains the following elements:

- **Enable Advanced Categorization Checkbox:** This turns the feature on or off.
- **Rollup Categories:** This allows you to enter up to 5 text strings. These rollup categories are defined by flexReceipts and represent specific item level features as they get created. Today the only Rollup category that can be used is “PRODUCT REGISTRATION” and will add a product registration link to the item on the digital receipt. The URL for the link is provided by the merchant and managed by flexReceipts.
- **DCS for Subsidiary:** This is a table that has 3 columns and is how the merchant selects which DCS codes will participate in the Rollup category’s feature.
 - **DCS Code:** Is a pre-populated list of DCS Codes in Retail Pro. You cannot add to this list directly, but can add additional DCS Codes in Retail Pro and they will appear here.
 - **Rollup 1:** This is a dropdown list that will allow you to select a Rollup category that has been entered in the “Rollup categories” table to the left.
 - **Rollup 2:** This is a dropdown list that will allow you to select a 2nd Rollup category that has been entered in the “Rollup categories” table to the left. This is intended for future use as flexReceipts add more item level features.

Advanced Categorization

☒ Enable Advanced Categorization

Roll-up categories		DCS for Subsidiary		
		DCS Code	Roll-up 1	Roll-up 2
1	PRODUCT REGISTRATION			
2		FOD		
3		FSH	PRODUCT REGISTRATION	
4		FUR		PRODUCT REGISTRATION
5		JWL	PRODUCT REGISTRATION	
		KID		

In the screenshot above, any items that have a DCS Code of FSH, FUR, or JWL will have a product registration link displayed with the item on the email receipt. Rollup 1 and Rollup 2 are independent. You can use either one for Product Registration. In the future, there will be additional Rollup categories created and a DCS code will be able to use up to 2 of them.

Note: This feature cannot be turned on by the merchant. Only flexReceipts can turn on this feature and add the URL for the Product Registration link. This setup screen is designed for the merchant to manage which DCS code to use with the feature(s).

PART III: Operation at Point of Sale

When a receipt with a Bill To Customer is saved in Retail Pro, the flexReceipts plugin attempts to authenticate the customer with flexReceipts using the customer record info. This can include the customer's email address, both phone numbers and loyalty number (if selected during setup).

If there is no Bill To customer on a receipt or the customer cannot be authenticated with flexReceipts then the flexReceipts plugin allows the customer to receive a digital receipt by entering their email address.

Receipt Print Update

1. Prepare a receipt following your normal Retail Pro process.
2. When the receipt is complete, click the "Print Update" button.
3. The "Does The Customer Want A Receipt" dialog box will pop up.

No Bill To Customer OR No Email Address on File

If there is no Bill To customer selected for the invoice or the Bill To customer does not have an email address in the customer record, the "Email" field will be empty.

Bill To Customer with Email Address OR existing flexReceipts Customer

If there is a Bill To customer on the invoice with an email address in the customer record, or the customer information provided matches a registered flexReceipts user, the "Email" field will be pre-populated with an email address.

Selecting The Receipt Type

The cashier or customer selects the appropriate Receipt Type from the following options:



- **Yes Digital Receipt Only**
 - Email address is required.
 - No paper receipt (unless an EFT receipt is required for signature) is printed.
 - Receipt is emailed to customer's provided Email.
- **Yes Digital Receipt + Printed Receipt**
 - Email address is required.
 - Paper receipt (including EFT receipt as required) is printed.
 - Receipt is emailed to customer's provided Email.
- **No Printed Receipt Only**
 - No email address is required.
 - Only paper receipts are printed.
 - Receipt is not emailed to the customer.
 - Digital receipt is sent to flexReceipts for Merchant Portal access.

Optional Features

Checkboxes will appear for different features if you have them turned on.

Loyalty Program Member (Email Required): This is a custom, ad hoc way to track whether a customer is a loyal customer and is not related to and does NOT work with the Retail Pro Loyalty System.

- Visible if “Enable Loyalty Tracking” checkbox is checked in the “Loyalty Tracking” tab of the flexReceipts Setup screen.
 - If this feature is turned on, the plugin will do the following with each transaction:
 - If the “Enable Loyalty Tracking” checkbox is checked:
 - Add a “YES” to the customer record in the “Loyalty Status Field” selected in the flexReceipts Plugin Setup.
 - Add the current date to the “Loyalty Tracking Date Field” selected in the flexReceipts Plugin Setup.
 - If the “Enable Loyalty Tracking” checkbox is unchecked:
 - Add a “NO” to the customer record in the “Loyalty Status Field” selected in the flexReceipts Plugin Setup.
 - If a customer is already on the invoice:
 - The “Loyalty Program Member (Email Required)” checkbox will reflect the value stored in the “Loyalty Status Field” of the customer record.
 - If a customer is not already on the invoice and the “Loyalty Program Member (email required)” checkbox is checked by the cashier:
 - The plugin will search the customer database for the email address.
 - If a customer is found with a matching email address:
 - Add the customer to the invoice.
 - Properly set the “Loyalty Status Field” and “Loyalty Tracking Date Field”.
 - If the email address is not found:
 - The plugin will create a new customer and prompt the cashier for any Retail Pro customer record required fields.
 - Add the customer to the invoice.
 - Properly set the “Loyalty Status Field” and “Loyalty Tracking Date Field”.

Opt-in to Email Marketing: This is a custom, ad hoc way to track whether a customer has given you permission to use the email address provided for email marketing purposes.

- Visible if “Prompt for email marketing optin” checkbox is checked in the “General” tab of the flexReceipts Setup screen.
- If this feature is turned on, the plugin will do the following with each transaction:
 - If the “Prompt for email marketing optin” checkbox is checked:
 - Add a “YES” to the customer record in the “Email Optin Field” selected in the flexReceipts Plugin Setup.
 - If the “Prompt for email marketing optin” checkbox is unchecked:
 - Add a “NO” to the customer record in the “Email Optin Field” selected in the flexReceipts Plugin Setup.
- If a customer is already on the invoice:
 - The “Optin to email marketing” checkbox will reflect the value stored in the “Email optin Field” of the customer record.
- If a customer is not already on the invoice AND the “Optin to email marketing” checkbox is checked by the cashier:

- The plugin will search the customer database for the email address.
 - If a customer is found with a matching email address
 - Add the customer to the invoice.
 - Properly set the “Email Optin Field”.
 - If the email address is not found:
 - The plugin will create a new customer and prompt the cashier for any Retail Pro customer record required fields.
 - Add the customer to the invoice.
 - Properly set the “Email Optin Field”.

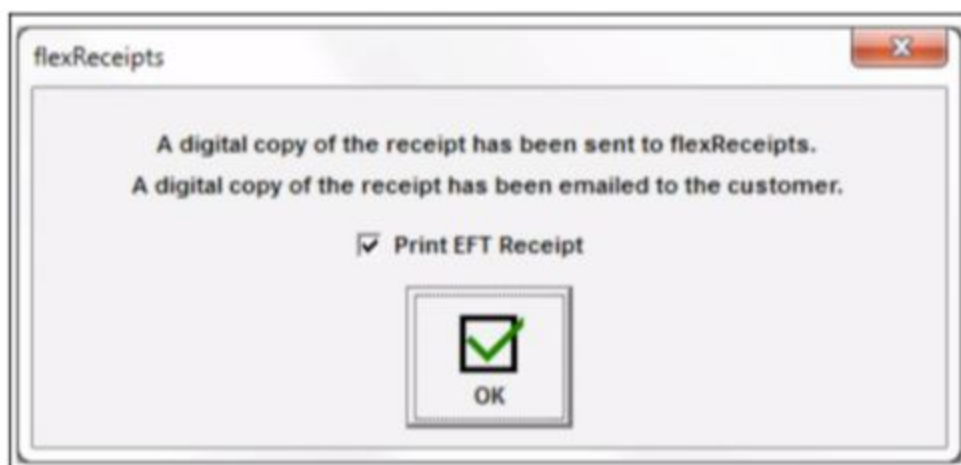
EFT Receipts

If Retail Pro requires an EFT receipt to be printed for signature on a credit card transaction, the EFT receipt will still print even if the “Digital Receipt Only” option is selected. The cashier can change this behavior on the fly using the “Print EFT Receipt” checkbox on the Confirmation Message popup.

Confirmation Message

After the digital receipt is sent, the following confirmation dialog is displayed:

- If the receipt has NOT been sent to the customer, the second line is omitted.
- If the receipt does not have a credit card tender, the “Print EFT Receipt” checkbox does not appear. However, if the receipt does have a credit card tender, the “Print EFT Receipt” checkbox does appear and is checked by default.
- “Printed Receipt Only” receipts do not display this confirmation dialog.



Printed (Paper) Receipts

The following table demonstrates the printed (paper) receipts that can be expected with the various combinations of "Print EFT Receipt" checkboxes for each of the receipt types for credit card and non-credit card transactions.

	EXPECTED PRINTED (PAPER) RECEIPTS		
	Credit Card Transactions		Non Credit Card Transactions
	"Print EFT Receipt" Checked	"Print EFT Receipt" Unchecked	
Digital Only	EFT Only	NONE	NONE
Digital and Printed	BOTH	REG Only	REG Only
Printed Only	BOTH		REG Only
No Receipt	NONE		NONE

TABLE KEY:

- **"PRINT EFT RECEIPT" CHECKED** - A credit card transaction where the "Print EFT Receipt" is checked.
- **"PRINT EFT RECEIPT" UNCHECKED** - A credit card transaction where the "Print EFT Receipt" is unchecked.
- **CREDIT CARD TRANSACTIONS** - Shows how credit card transactions will behave with the various settings.
- **NON CREDIT CARD TRANSACTIONS** - Shows how noncredit card transactions will behave with the various settings.
- **EFT ONLY** - Only an EFT receipt should print.
- **REG ONLY** - Only a Regular receipt should print.
- **BOTH** - Both a regular and EFT receipt should print.
- **NONE** - No receipt should print.

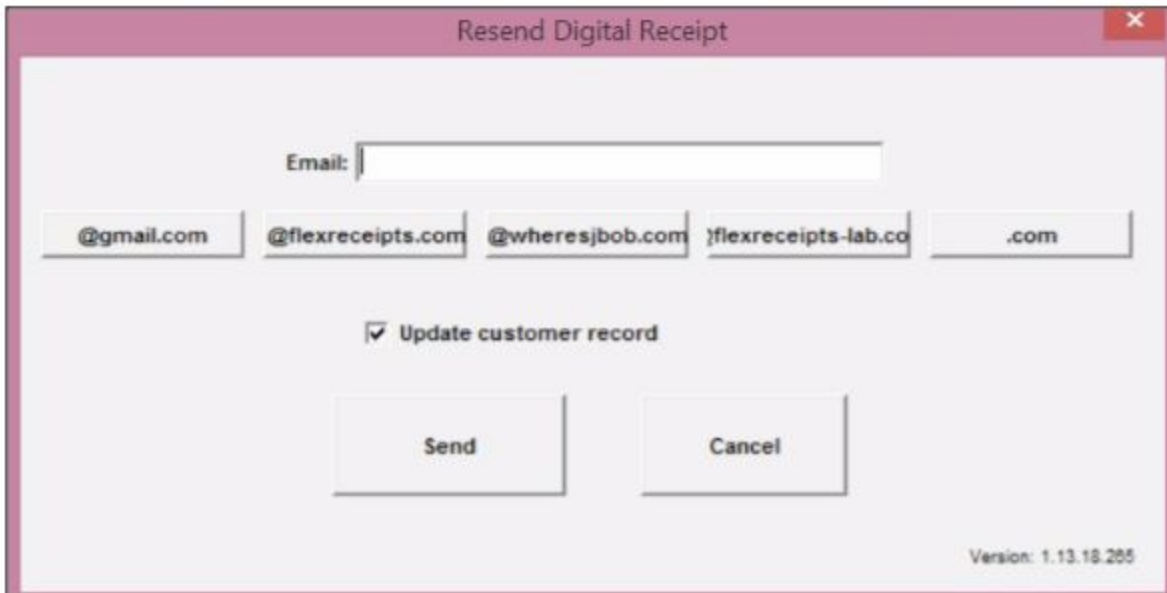
Record Sale

When Record Sale is done from an SO, the flexReceipts dialog boxes are displayed. However, the Record Sale Receipt printing is still controlled by the "Print Record Sale Receipt" prompt in Retail Pro.

TO EMAIL A FORMER RECEIPT

Former receipts can be emailed from the List or Form view by selecting the receipt and clicking on the "Email Receipt" button. A "Resend Digital Receipt" popup will appear allowing you to verify or enter the email address. If the receipt was previously emailed, the email address will be pre-populated. The "Update customer record" allows you

to choose if you want to update the customer records if an email address is added or changed. Click **"Send"** to email the receipt.



The image shows a Windows-style dialog box titled "Resend Digital Receipt". It features an "Email:" label followed by a text input field. Below the input field is a row of five dropdown menus containing the following text: "@gmail.com", "@flexreceipts.com", "@wheresjbob.com", "flexreceipts-lab.co", and ".com". Below these dropdowns is a checkbox labeled "Update customer record" which is currently checked. At the bottom of the dialog are two buttons: "Send" and "Cancel". In the bottom right corner, the text "Version: 1.13.18.205" is displayed.

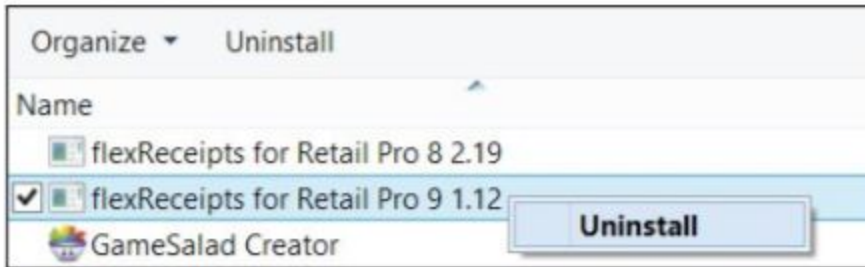
Uninstalling the flexReceipts Plugin

The flexReceipts plugin can be uninstalled like any other Window application.

- Go to Control Panel and click on "Programs > Programs and Features" (Windows 8).



- Find and select the "flexReceipts for Retail Pro 9 x.x.xx" entry, right-click on row, and click "Uninstall". This should remove the flexReceipts plugin.



Sample Email Receipt

The below table summarizes where various receipt content, as annotated in the sample receipt, comes from.






flexEngage
GO BEYOND THE SALE



Subject: Here is your receipt
From: MY STORE <receipts@mystore.com>
Date: Mon, Jul 06, 2015 7:09 am
To: customer@gmail.com
Attach: receipt.pdf

store GIFT Cards FREE 2-DAY SHIPPING ON ORDERS OVER \$150

ACME
MY STORE
317 Main Street
Orlando, FL 32811
800-555-1212

Store #: 001
Register #: 00001
Assoc: SYSADMIN
Transaction #: 587
Date: Jul-6, 2015 10:09:39 AM

Name	Share This Item	SKU	Quantity	Price	Total
 CEDAR TUNIC TANK TANK TEE Size: S / M / L / Vendor: Burton	  	140421	1	\$34.95	\$34.95
 SOFIE TOTE BAG TOTE BAG Size: L / M / L / Vendor: Burton	  	140081	1	\$59.95	\$59.95
 SKINNER SHORT SHORTS Size: S / M / L / Vendor: Burton	  	140381	1	\$49.95	\$49.95
				Sub-Total:	\$144.85
				Taxes:	\$10.00
				SALES: 6.25%	\$10.00
				Total:	\$154.85

Check us out!     

Payment Information
Auth Num: 12345
Total Paid: \$154.85

WS TEST
Thanks for Shopping!
Come Again Soon!

SALE
UP TO 30% OFF

HOOK YOURSELF UP
STYLE GUARANTEED
PACKS FOR ANY ADVENTURE

--- RETURN POLICY ---
Returns or exchanges accepted for products purchased at My Store only. Full refunds issued for unused product returns accompanied by original receipt. Store credit issued for all returns without receipt for current retail value. All cash/check returns over \$100 reimbursed via company check within 7-10 business days.
Roadrunner Tested. Coyote Approved!
<http://www.acme.com>


587

This receipt has been delivered to the email address that was provided by you at My Store for electronic communications. This receipt will allow you to keep a record of all your transactions at Burton and give you easy access to your receipts should you require proof of purchase at any time.

To view our privacy policy, please [Click Here](#)

This digital receipt has been sent using flexReceipts, a free service that allows you to easily store and organize all of your receipts in one central place. Never lose another receipt again! [Sign up now](#)

To make sure our emails reach your inbox, please add receipts@flexreceipts.info to your address book.

powered by 

1	Custom email subject. Set in Merchant Portal.
2	Sender Name & Sender Email Address. Set in Merchant Portal.
3	Email Header. HTML content from Merchant Portal.
4	Logo. Added by FR to the database during setup.
5	Store Name, Address, and Phone. Set in plugin configuration "Store" tab.
6	Store Number from Retail Pro.
7	Workstation Number from Retail Pro.
8	User Name from Retail Pro.
9	Invoice Number from Retail Pro.
10	Invoice Date from Retail Pro
11	Optional item image from item level social media feature.
12	Desc1, Desc2, Desc3, Desc4, Size, Attr, and Vendor from Retail Pro. Optional link from item-level social media feature.
13	Optional social media share links from item-level social media features.
14	Item ALU / SKU from Retail Pro.
15	Item Quantity from Retail Pro.
16	Item Unit Price from Retail Pro.
17	Item Extended Price from Retail Pro.
18	Subtotal from Retail Pro.
19	Tax Code, Tax Percentage, Tax Amount from Retail Pro.
20	Grand Total from Retail Pro.
21	Corporate Social Media links set in Merchant Portal.
22	Credit Card type, Last 4 Credit Card digits, Authorization Code from Retail Pro.

23	Tax Amount from Retail Pro.
24	Total Tender from Retail Pro.
25	Bill to Customer Name from Retail Pro.
26	Invoice Comment 1 from Retail Pro.
27	Invoice Comment 2 from Retail Pro.
28	Receipt Footer. HTML content from Merchant Portal.
29	Barcode. Style determined by plugin configuration. Visibility and position set in Merchant Portal.
30	Invoice Number from Retail Pro. Used to create a barcode.
31	Email Footer. HTML content from Merchant Portal.
32	Standard email closer.

Troubleshooting

This section documents some common installation, environment, and configuration issues that could lead to errors or undesirable behaviors:

SYMPTOM	POSSIBLE CAUSE	LIKELY REMEDY
"Digital Receipt Service Unavailable" message.	No internet connection	Open a browser and confirm that you can get to the Internet.
	Slow internet connection	Run a speedtest (e.g., http://www.speedtest.net). Increase the timeout in the plugin settings as needed. (See p. 4)
	Store Information missing or incomplete	Open the plugin configuration and confirm that the Store tab is completely filled out. (See p. 5)
	Merchant ID incorrect	Open the plugin configuration General tab and confirm Merchant ID is correct. (See p. 4)



Too many paper receipts printing.	Shift4 (or other EFT plugin) is initiating printing.	Go to "Options > W/S Preferences > EFT" Turn off the following features: <ul style="list-style-type: none">• Automatically Update/Print after card approval• Print EFT Receipt During Authorization• Print EFT Receipt on Print/Update
"Access Violation at address 0x00000000" message.	flexReceipts92.dll not registered	For 32bit Windows: <ul style="list-style-type: none">• Shutdown Retail Pro• Run the Windows Command prompt as an Administrator (right click on Command Prompt icon and select "Run as Administrator")• CD to your Retail directory.• Run Regsvr32 RProFlexRcpt2.dll• Confirm that you received a success message.• Restart Retail Pro. For 64bit Windows: <ul style="list-style-type: none">• Shutdown Retail Pro.• Run the Windows Command prompt as an Administrator (right click on Command Prompt icon and select "Run as Administrator").• CD to your Retail directory.• Run Regsvr32.exe from the SysWoW64 directory:<ul style="list-style-type: none">• C:\SYSWoW64\Regsvr32 RProFlexRcpt2.dll• Confirm that you received a success message.• Restart Retail Pro.
	Outdated printer driver	Update/upgrade your printer drivers.



"CreditDebit" printing as payment type on digital receipt.	Card Types are not defined properly in the plugin.	Open the plugin configuration Card Types tab and confirm that Card Types are entered correctly. (see p. 6)
Queued receipts are not being added to the Queue folder.	Queue functionality is disabled.	
	Queue service is not running.	
	FRQueueService.exe is missing	