RMH Configuration Guide

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1 Overview:

This document describes the process of installation/uninstallation of RMH POS. Detailed step by step explanation of the process of configuring the bLoyal RMH connector is explained in this document.

2 Software Requirements

The following are software requirements that allow for full functionality of the bLoyal integration with RMH:

• .NET Framework 4.5.2 or greater

3 bLoyal Configuration File Overview:

Files will get added by "bLoyal RMH POS" setup. The path will be as below, C:\Program Files (x86)\bLoyal\RMH Integration\ConnectorSettings.xml

This file contains configuration information required for integration of RMH POS application with bLoyal.

4 Configuration in Director:

4.1 Create a Store in bLoyal

Steps

Login bLoyal Director with valid credentials and Click on 'Channels' tab and navigate to Store menu.

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Store Connectors	Address:				-				
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	Country:	United States			•				
	Timezone:	Default ((UTC-08:00) Pacific Time	US & Canad	a))	•				
	Language Code:				•				
	Brand:				•				
	Customer Partition:	None			•				
	Product Partition:	None			•				
•	Out of Inventory:	Ignore out of stock and accept ord	ers with no v	varning	•				
	Pickup Order Type:	Create standard pickup orders			<u>•</u>				
	Credit Card Provider:				•				
	Gift Card Provider:				•				
	Tax Rate Provider:	Use Default			•				
	Compliance Checks:	Always Check			•				
	Compliance Provider:	Use Default			•				
	Credit Card CVV Code:	Use Default: Not Required			•				
	Shopping Cart Checks:	Check for errors when adding to ca	rt		•				

Click on 'New' button for Store and enter the below details

- Title.
 Type.
 Code.
- 4. Brand.

4.2 Create Devices in bLoyal

You need to create a device associated with above store **Steps**

Go to the 'Channels' tab and Click on 'Devices' menu link.

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Click on 'New' button and enter the below details.

- Store (Created above)
- Enter Device Code This should be same as the register number in RMH Store Manager. For searching the Register Number see below section.
- Device Name.
- Device type as 'Mobile POS Lane'.
- 'Integrated application' as Retail Management Hero. (present for bLoyal)
- Order Channel as 'POS' and select 'Default Price Level'.
- You can select POS Snippet Configuration from multiple configuration by clicking on 'Use the following POS Snippet Configuration Profile ' radio button or you can choose 'Use POS Application default configuration ' radio button for default

Click on the "Save" button.

Note- The Device Code should be same as the register number in RMH Store Manager. You will need to create same number of devices in Director as they are present in RMH Store Manager. API Keys will be different for all the devices.

Get Register Number

- Go To "RMH Store Manager". Select "Setup" from the list of menu options on the right.
- Expand "Hardware" option and select "Register List" option. All the devices in the store will be displayed here with register number.

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Hardware	▶ 1	Register #1									
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4.3 Create Application System

A bLoyal Application System, API key & Connector Profile are pre-requisite for configuring the RMH Connector. Please refer to the following steps to create an Application System:

1. Click "Setup" in the upper-right corner of bLoyal, then click the "Settings" tab on the left-hand side, then select "Grid Setup" under Grid Service Configuration.



2. Click the drop-down menu in the upper-left corner and select "Application system".

bLoyal	Insight	Customers	Engagement	Loyalty -	Orders -	Products	Grid -
Application Systems + New	Search				Mor	e Actions	٣
Advanced Search							•

3. Click the "+New" button.

bLoyal	Insight	Customers	Engagement	Loyalty -	Orders -	Products	Grid -
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Advanced Search							•

- 4. Enter the following details and click the "Save" button to create the Application System.
 - Name
 - Order Discount Behavior This should be selected as "Line".
 - Order Discount Code
 - Please add a Non-Inventory Product into RMH that has an Item Lookup Code that is the same as the Order Discount Code.
 - Order Discount Name

- Shipping Charge Behavior This should be selected as "Line"
- Shipping Charge Code
- Shipping Charge Name
- Tax Behavior This should be selected as "Line"
- Tax Charge Code
- Tax Charge Name

Loyal			Insight	Customers	Engagement	Loyalty -	Orders -
Application Systems 👻	+ New						[1
Name	RMH						
Order Discount Behavior	Line	~	Order Discount Code	OrderDisco	unt	Order D	iscount Nam
Shipping Charge Behavior	Line	~	Shipping Charge Code	Shipping		Shipping	Charge Nam
Tax Behavior	Line	~	Tax Charge Code	SalesTax		Tax	Charge Nam
Disable Order Engine			Create Sales Transactions from Cart Commitments			Use produc	ct 'on sale' fla from Directo

4.4 Create a bLoyal API Key for Backend Connector

A bLoyal API key is a pre-requisite for configuring the RMH Connector.

1. Click the drop-down menu in the upper-left corner and select "API Key".

bLoyal	Insight	Customers	Engagement	O O Loyalty •	Orders	Products	B Grid -
Integration Providers + New	Search				Mor	e Actions	٣
Application Systems							•
API Keys							
Integration Providers							
Replication Profiles							
Custom Field Definitions							
Custom Entity Definitions							

2. Click the "+New" button.

API Keys 🛛	+ New	Search
Advanced Se	arch	

- 3. To create new API Key for use with the RMH backend connector, provide the following information:
 - <u>Name</u> Enter a name used simply for identification purposes.
 - <u>Application System</u> Choose the application system created above.
 - <u>Connectors –</u> "Retail Management Hero(RMH)" type.
 - Key Type Choose "Store".
 - <u>Store Select the store created above.</u>
 - <u>Connector Profile</u> Use Default
- 4. Click "Finish".

4.5 Create a bLoyal API Key for Front End Connector

A bLoyal API key is a pre-requisite for configuring the RMH Connector.

1. Click the drop-down menu in the upper-left corner and select "API Key".

bLoyal	Insight	Customers	Engagement	S [®] Loyalty -	Orders	Products	Bend +
Integration Providers + New	Search				Mor	e Actions	•
Application Systems							•
API Keys							
Integration Providers							
Replication Profiles							
Custom Field Definitions							
Custom Entity Definitions							

2. Click the "+New" button.

API Keys 🔫	+ New	Search
Advanced Sea	arch	

Name	RMH API		
Application System	RMH POS	•	
Connectors	Retail Management	•	
Кеу Туре	Device	•	
Device	RMH STORE:RMH D	•	
Connector Profile	Use Default	•	
	Disabled		
	Locked		

- 3. To configure the newly created API key for use with the RMH backend connector, provide the following information:
 - <u>Name</u> Enter a name used simply for identification purposes.
 - <u>Application System</u> Choose the application system created above.
 <u>Connectors -</u> "Retail Management Hero(RMH)" type.

 - <u>Key Type</u> Choose "Device".
 - <u>Device</u> Created above.
 - Connector Profile Use Default •
- 4. Click "Finish".

5 Configuration in RMH:

5.1Workstations Setup on RMH POS:

This step will add ".dll" files that are required for bLoyal integration with RMH.

1. Go to 'bLoyal_Customer_Loyalty>bLoyal RMH POS' folder.

bLoyal RMH POS						- 🗆 >
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Desktop Downloads Recent Places Libraries Documents Music Pictures Videos Computer Local Disk (C:) Temporary Storage (Description of the second s	6 bloyal rmh pos	3/8/2018 2:15 PM	Application	275,370 KB		
1 item						

2. Double click on "bLoyal RMH POS" setup file.

	Completing the InstallAware Wizard for bLoyal RMH POS
	You have successfully completed the InstallAware Wizard for bLoyal RMH POS.
	To close this wizard, click Finish.

3. Click on "Finish" button.

It will automatically add .dll files in "Retail Hero\RMH POS\Extensions\bLoyal" folder, and we need to restart RMH POS and Store Manager to see the changes.

Files will be added to the below path: -

32 Bit System path = C:\Program Files\Retail Hero\RMH POS\Extensions\bLoyal OR

64 Bit System path = C:\Program Files (x86)\Retail Hero\RMH POS\Extensions\bLoyal

After this process, it will automatically add Master Setting button under Customer Buttons of RMH POS.

5.2 Setup "ConfigSampleApp"

- i. Go to C:\Program Files (x86)\bLoyal\RMH Integration\Configuration Application
- ii. It will open "Master Settings" window.
- **iii.** Click on the "Enable bLoyal" button. (This will create a POSConnectorSettings file in "C:\ProgramData\bLoyal\Settings" folder)
- iv. Fill-up all information and Generate the Access Key before saving it.
- **v.** Please test the database connection by clicking the button "Test Database Connection."

oyalty Engine Crede	entials		RMH Database	Connection
ogin Domain:	Client	*	Server Name:	RMHSUPPORT\: *
piKey:	79fd086a-3b2e-4251-9bb3-4659e	*	Databasa Nawa	· BMH *
	Task bland Canadian		Database Name:	
	Connection Status : Pass	- 1	Authentication:	Windows Authentication
oyalty Tender Code:	LOYALTY	•	User ID:	*
# Card Tandar Cada			Password:	*
in Card Tender Code.		<u> </u>		
ift Card SKU:				Test Database Connection
Loyal Custom URLs				Connection Status : Pass
OS Snippet URL:	[
omain URL:				

Fields	Description
Login Domain	This is the company used to access your bLoyal Director account.
API Key	This is an API key from your bLoyal Director account. Here API Key type should be Device specific. This is the API Key created above for Front End Connector.
Lock	This will lock the API key and generate the access key.
Test bLoyal Connection	This will check the type of API key that is required for configuration.
Loyalty Tender Code	This is the code corresponding to the loyalty tender in your bLoyal Director account.
Gift Card Tender Code	This is the code corresponding to the Gift Card tender in your bLoyal Director account.
Gift Card SKU	(Optional) This is the SKU of the RMH item that will be used to trigger the action of loading a balance onto a bLoyal gift card.
Custom POS Snippet URL	This is optional and is only required if you've been given specific instructions from bLoyal.
Domain URL	If you own multiple domains then this can be used to launch custom domains. (Optional)
Server Name	This is a SQL Database Server name. This will be the name of server where we need to connect to install for accessing RMH database for all the operations.
Database Name	This is a Database Name, where all data will be stored.
Authentication	This is the type of authentication for database.

Туре	
User ID	This is a user/login name of SQL Database Server.
Password	This is a password of SQL Database Server.
Test Database Connection	This is useful to test the connection to the Database through POS system.
Enable/Disable bLoyal Functionality	This will enable/disable the bLoyal Functionality, and will block all the bLoyal Snippets or Feature from use.
Update bLoyal Service URL	This can be used to update the bLoyal Service URLs.

Note: Once you complete the master settings please go ahead and close & open the RMH POS.

After opening the RMH POS go to the below "Operations" Menu Option below and select the "Batch" and then finally select "Print Z-Report" and click Yes on the confirmation pop-up.

Ρ	RMH POS		A 1024x768	T Light	•	3.2.0.3392	886-1073	SQLEXPRESS8R2\RMH	ł	999	4:32 PM
saction	Scan or ent	ter the item code					ě	↓ ⊗	- Custom Com bLoj	_{val Find Custo}	omer
Tran		Code	Name	Price	Qty.	Ext. Price	-	Enter Opening	Amounts	al Quick Sigr	n Up
nternet								Fatas Classica (\	oyal Quick Ed	dit
Ir							-0	Enter Closing A	Amounts	I View Custo	mer
							•0•	View X-Report		'review Disco	ount
								Print X-Report		GiftCard Bala	ance
							5	Print Z-Report		Loyalty Bala	ance
								Print ZZ-Repor	t	ва	itch
Sav	ings: \$(n count:	0.00						Total:		E\$ Ca	ish 🕨
Tra	nsaction #:					Subtotal:	<i>+</i>			G Se	cure 🕨
						\$0.00	\$	0.00			oout 🕨
	Items 🔻	Customers	s 🔻 🚺 Taxes 🔻	7	ransaction	•	Orders	Disc	ounts 🔻	Coper	rations 🔺

5.3 bLoyal Loyalty Receipt Setup

To enable bLoyal Receipt Messages, please follow the steps below.

1. Open RMH Store Manager.

- 2. Navigate tot Setups -> Hardware -> Register List
- 3. Edit the Register that is being used.
- 4. Navigate to Printer Receipt 1 and view which Receipt Format is currently being used.

- +	Register : Register #1 - 1				
Home					
Save And Save	E Save And	First P	rev Next Last	Close	
Close And Edit	New				
Save		N	lavigation		
Net Display	Payment	Pro <u>files</u>			
Scanner	Cash D	rawer 1	Cash Drawer	2	
General	Receipt	Printer <u>1</u>	Receipt Printe	er <u>2</u>	
Receipt Printing					
Sales Receipts: Do not print receipt					
Gift Receipts: Do not print receipt					
Printer Type					
Windows					
OOPOS					
Windows device nam	ne				
STAR10					
Options					
Journal receipts f	from this printe	r			
Receipt format:					
40 Column Receipt	Format			XQ	

- 5. Remember the name of the Receipt Format and next navigate to Setup -> Hardware -> Receipt Formats
- 6. Click on the Receipt Format that is being used with the Register and press Edit.

I -	Receipt Form	ats : 40 Column Rec	eipt Format	
Home				
8, 6	8			2
Save And Sav Close And I	re Save And Edit New	First Prev Nex	kt Last	Clo
Sav	/e	Navigation	n	
Title	40 Column Rec	eipt Format		
Description	40 Column Re	ceipt Format		
Receipt and report	t templates			
Sales	Loyalty Receip	ot - 40 column 🔀	Prop	perti
Cancelled	Loyalty Receip	ot - 40 column 🗙	Prop	perti
Layaway	Loyalty Receip	ot - 40 column 🛛 🗙	Prop	perti
Payment	Loyalty Receip	ot - 40 column 🗙	C Prop	perti
Pay Out	Loyalty Receip	ot - 40 column 🗙	Prop	perti
Cash Drop	Loyalty Receip	ot - 40 column 🗙	Prop	perti
Quote	Loyalty Receip	ot - 40 column 🗙	Prop	perti
Work Order	Loyalty Receip	ot - 40 column 🗙	C Prop	perti
	XML 40-col X a	and Z Report a 🗙	C Prop	perti

- Press the magnifying glass on the "Sales" Receipt Format and navigate to "C:\Program Files (x86)\bLoyal\RMH Integration" in the popped up file explorer to find the "LoyaltyReceipt.xml" file.
- 8. Click on the "LoyaltyReceipt.xml" file and set that to the "Sales" Receipt Format.

Example of RMH Receipt:

Store 1 2982 Main St. Newport Beach CA 84382 (213) 555-0143

Sales Receipt

Transaction Account #:	1 #:	9987507 D00700010016
Date: 2/24	4/2022	Time: 4:45 PM
Cashier:		Register #: 1
ltem	Descriptio	n
15100	Football	
		Cub Tatal
		Sub lotal
		Iotal
		Cash Tendered
		Change Due
		ondinge bae
	99	987507
	Thank yo	u for shopping

Storo 1

Now the RMH Register will add the bLoyal Loyalty Receipt Message when creating receipts.

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6 Data Sync Service integration

This is required to sync the data from RMH to bLoyal and vice versa. For example, Products, Departments, Customers, Orders etc.

i. Go to "bl	Loyal_Customer_Loyalt	y>bLoyal RMH S	tore Conne	ector'" folder	•	
📙 bLoyal RMH Store Conne	ector					
G 🕞 🗸 🕨 bLoyal_C	ustomer_Loyalty + bLoyal_Customer_Loyalty	► bLoyal RMH Store Connector	▼ 🐓	Search bLoyal RMH St	ore Connector	2
Organize 🔻 Include in libr	ary 🔻 Share with 👻 New folder				· ·	0
🙀 Favorites	Name *	Date modified	Туре	Size		
 Desktop Downloads Recent Places Libraries Documents Music Pictures Videos Computer Local Disk (C:) Temporary Storage (D Network 	bloyal rmh store connector	3/8/2018 2:15 PM	Application	275,274 KB		t
1 item						

6.1 Process to add Data Sync Service:

ii. Double click on "bloyal rmh store connector" setup file.

Julyal RMH Store Connect	tor - InstallAware Wizard
	Completing the InstallAware Wizard for bLoyal RMH Store Connector
	You have successfully completed the InstallAware Wizard for bLoyal RMH Store Connector.
	To close this wizard, click Finish.
InstallAware	< Back Finish Cancel

iii. Click on "Finish" button.

6.2 Process to start Data Sync Service:

Go to the "C:\Program Files (x86)\bLoyal\Store Connector for RMH" folder location
 Double click on "BLoyal.RMHMonitor" exe file.

3. It will open Data Sync Service window.

BLoyal.Connector.Engine	3/3/2017 10:07 AM	Application	55 KB
BLoyal.Connector.Engine.pdb	3/3/2017 10:07 AM	PDB File	110 KB
🚳 bLoyal.Connectors.Grid.dll	12/10/2016 6:32 PM	Application extension	367 KB
🚳 BLoyal.DataConnector.RMH.dll	3/3/2017 10:07 AM	Application extension	139 KB
BLoyal.DataConnector.RMH.pdb	3/3/2017 10:07 AM	PDB File	158 KB
🚳 bLoyal.dli	12/8/2016 6:01 AM	Application extension	64 KB
🚳 BLoyal.MonitorCore.dll	3/3/2017 10:07 AM	Application extension	85 KB
BLoyal.MonitorCore.pdb	3/3/2017 10:07 AM	PDB File	68 KB
🕞 BLoyal.RMHMonitor	3/3/2017 10:07 AM	Application	14 KB
📑 BLoyal.RMHMonitor.exe	1/3/2017 2:27 PM	XML Configuration File	1 KB
BLoyal.RMHMonitor.pdb	3/3/2017 10:07 AM	PDB File	16 KB
BLoyal.RMHStoreConnector	3/3/2017 10:07 AM	Application	11 KB
BLoyal.RMHStoreConnector.pdb	3/3/2017 10:07 AM	PDB File	24 KB
🚳 BLoyal.VSFramework.dll	3/3/2017 10:07 AM	Application extension	804 KB
BLoyal.VSFramework.pdb	3/3/2017 10:07 AM	PDB File	1,922 KB
📄 EntityMap	1/3/2017 2:27 PM	XML Document	100 KB
🚳 Newtonsoft.Json.dll	6/13/2016 5:36 PM	Application extension	514 KB
🕋 Newtonsoft. Json	6/13/2016 5:36 PM	XML Document	511 KB
StoredProcs	1/3/2017 2:27 PM	XML Document	1 KB
🚳 System.Net.Http.Formatting.dll	1/27/2015 10:32 PM	Application extension	182 KB
System.Net.Http.Formatting	1/27/2015 10:32 PM	XML Document	189 KB
🕋 TableMap	1/3/2017 2:27 PM	XML Document	105 KB

4. Click on Connector Tab.

5. Click on "Options..." link.

	Connector			
	Connect Now	F5		
ē	Start Service Stop Service		Current Wait:	
s	Set Entity Sync Date Set Transaction Start Date Reset Director Inventory	▶ <mark>int</mark>		
	Options			

- 6. It will open "RMH Store Connection Configuration" window.
- 7. Under "Database" menu, it will show the Database details that needs to be configured in RMH Store Connector Configuration form.
- 8. Server, Database, User & Password- These details should be entered to connect with the database.

🚯 bLo	oyal RMH Store Connector Monitor	П×
File RN	MH Store Connector Configuration	
	Database Store Key Display Custom Urls Server Test OK Database Update Cancel Vser Password Image: Cancel	

9. Click on Store Key to add Login Domain and API Key.

10. User will be able to Lock the API key by clicking the button "Lock" button only after

entering the Login Domain & API Key. 11. Click on the "OK" button to save the cpnfiguration. **Note:** Enter the API Key created above for Back End Connector which is Store specific.

🚯 bLo	yal RMH Store Connector Monitor	- D ×
	H Store Connector Configuration Database Store Key Display Custom Urls Login Domain	OK Cancel
		///

12. Customer URL: This is optional and is only required if you've been given specific instructions from bLoyal.

🚯 bLoyal RMH Store Connector Monitor	_ 🗆 🗵
File RMH Store Connector Configuration	
Database Store Key Display Custom Urls	OK Cancel
	1.

7 Uninstall Packages

This process contains steps to uninstall bLoyal integration with RMH

- 1. Go to "Control Panel".
- 2. Then, go to "Uninstall a program".
- 3. Select "bloyal RMH POS" and right click.

Organize 🔻					
Name	Fublisher	🔸 I 👻 💽 Sia	ze 🔽	Version	
🌃 Retail Management Hero Store Manager	Retail Hero	4/13/2017	252 MB	3.2.0.3415	
🎴 Retail Management Hero POS	Retail Hero	4/13/2017	48.3 MB	3.2.0	
🛑 bLoyal RMH Store Connector	bLoyal	4/13/2017		1.0	
🕞 bLoyal RMH POS	bLoyal	4/13/2017		1.0	

- 4. Then, click on Uninstall.
- 5. Click on "Finish" button.



It will automatically remove bLoyal integration's .dll files from "Retail Hero \RMH POS\Extensions" folder.

This process will remove files from following locations depending on your Operating system: 32 Bit System path = C:\Program Files\Retail Hero\RMH POS\Extensions\bLoyal OR 64 Bit System path = C:\Program Files (x86) \Retail Hero\RMH POS\Extensions\bLoyal

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8 Uninstall Data Sync Service

This will uninstall the service that sync data between Dinerware and bLoyal systems.

- 1. Go to "Control Panel".
- 2. Then, go to "Uninstall a program".
- 3. Then, select "bloyal RMH Store Connector" and right click.
- 4. Then, click on Uninstall.

ame	- Publisher	• I • •	Size 💌	Version	•
📲 Retail Management Hero Store Manager	Retail Hero	4/13/2017	252 MB	3.2.0.3415	
Retail Management Hero POS	Retail Hero	4/13/2017	48.3 MB	3.2.0	
lə bLoyal RMH Store Connector	bLoyal	4/13/2017		1.0	
🕞 bLoyal RMH POS	bLoyal	4/13/2017		1.0	

5. Click on "Finish" button.

After this process, it will automatically remove the RMH Data Sync Service.

