QWICKSERVE MOBILE 2.0

Pilot Application Startup Guide

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REFERENCES

#	Document or Section	Document Version
1	QwickServe Menus at Petrosoft Cloud Help	v. 5.0
2	Specifying QwickServe Mobile Settings at Petrosoft Cloud Help	v. 5.0
3	QwickServe Terminal Manual at Petrosoft Cloud Help	v. 5.0
4	QwickServe Cloud Manual at Petrosoft Cloud Help	v. 5.0
5	QwickServe Terminal Quick Start Guide at Petrosoft Cloud Help	v. 5.0
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INTRODUCTION

This document describes how new and existing customers can start accepting orders from the QwickServe mobile application. The document contains a step-by-step guide on how to configure a location for QwickServe Mobile, connect it with the online payment gateway and update the SSOT/KDU software.

> ℹ️ *This is a pilot release of the QwickServe Mobile functionality. The functionality might be changed in backward-incompatible ways and is not subject to any SLA or deprecation policy.*

GETTING STARTED

Prerequisites

To be able to configure your account locations for QwickServe Mobile, make sure that the following prerequisites are met:

- The QwickServe product is available for your account.
- The QwickServe remote ordering product is available for your account.
- A QwickServe menu is configured for the required location.
- At least one employee at the location has rights to access the QwickServe devices management interface.

General Setup Workflow

To set up your location for QwickServe Mobile and check how it works, you need to complete several simple steps. Steps marked as *Required* must be completed, while steps marked as *Optional* are recommended but can be omitted.

| Step #	Operation	Description	Result	Optional/ Required
1	Configure a location for QwickServe Mobile.	At this step, you will allow to show the selected location in QwickServe Mobile and configure some mandatory settings for correct location displaying in the application.	The location appears in the locations list in QwickServe Mobile.	Required
2	Allow Petrosoft to collect payments from QwickServe Mobile.	At this step, you will link a Braintree Merchant account with you Petrosoft account and allow Petrosoft to collect payments on your behalf. This step is optional, if you do not need to accept online payments, you can omit it.	The credit card payment option becomes available in QwickServe Mobile for your location(s).	Optional
3	Update and configure QwickServe onsite devices.	At this step, you will update the software on your devices to the latest beta version and change KDU settings to request QwickServe Mobile orders from the cloud.	Your onsite devices get the latest software version and an ability to receive orders placed over QwickServe Mobile.	Required
4	Configure the mobile application and check configuration.	This step is required only for the pilot period. You will configure the installed QwickServe Mobile application to show only your locations in the list.	You try putting yourself in customer's shoes and review how the ordering process from QwickServe Mobile looks like.	Optional

NAVIGATING TO QWICKSERVE SETTINGS FOR LOCATIONS

Location settings for QwickServe Mobile are configured on the C-Store Office side.

To access the location settings, follow the steps:

1. Log in to C-Store Office using you Petrosoft account.
2. At the top right corner of the C-Store Office home page, click your account name and select **General** > **Locations**.
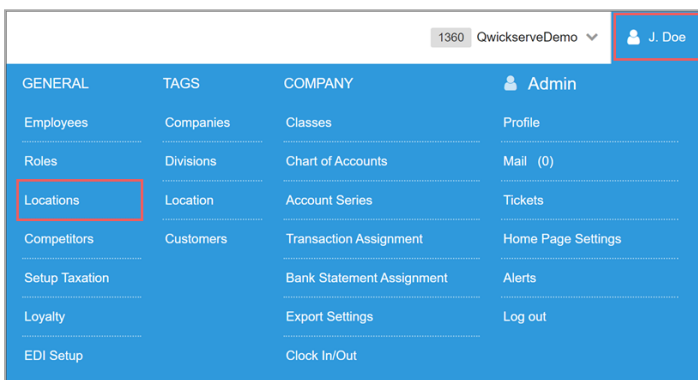
3. In the **Locations** list, select the necessary location and click **Edit**.
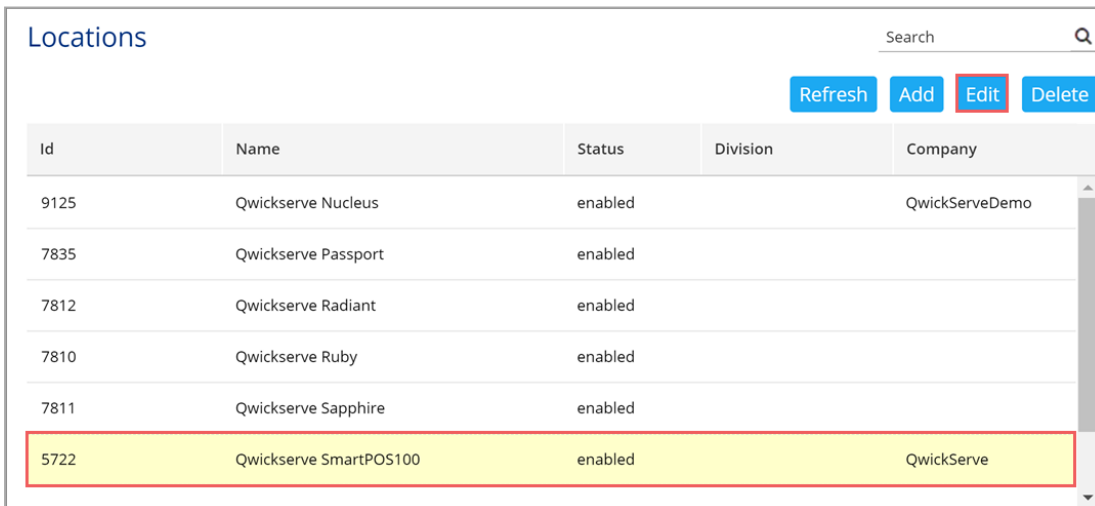
4. In the left menu of the location settings form, click **QwickServe**.

STEP 1. CONFIGURE LOCATION SETTINGS FOR QWICKSERVE MOBILE

A location becomes available for customers in the QwickServe Mobile application only when its settings are configured in the correct way. To configure the location settings, you need to perform the following activities:

- Specify information about the location
- Set up the work schedule for the location

> ℹ️ This section describes how to configure basic location settings for QwickServe Mobile. For a full description of location setup, see *Specifying QwickServe Mobile Settings* at Petrosoft Cloud Help.

Specifying Location Information

First of all, you need to inform the system that you would like to show your location in the list of available locations in QwickServe Mobile. You also need to configure the following settings for the location:

- Location name and icon
- Location description
- Location land-line or cell phone

The location settings configured at this step become public and are displayed to customers in QwickServe Mobile.

To configure the location settings, follow the steps:

1. Access the QwickServe locations settings form. For more details, see Navigating to QwickServe Settings for Locations.

2. In the **Mobile application** section, select the **Show location in QwickServe Mobile** check box.

3. The system will request you to specify additional settings for the location:
    a. In the **Location name** field, enter the location name.
    b. In the **Description** field, enter the location description if any.
    c. In the **Phone** field, enter the location phone.
    d. Upload the location logo in the PNG format. You can drag and drop the logo onto the image box or select a path to the image location. The recommended logo size is 450 x 450 in pixel.

4. The location address shown in QwickServe Mobile is the same as the one configured on the **General** form of the locations settings. To view or change the location address, in the left menu of the location settings form, click **General**.

Result: The provided information becomes available to customers in QwickServe Mobile.
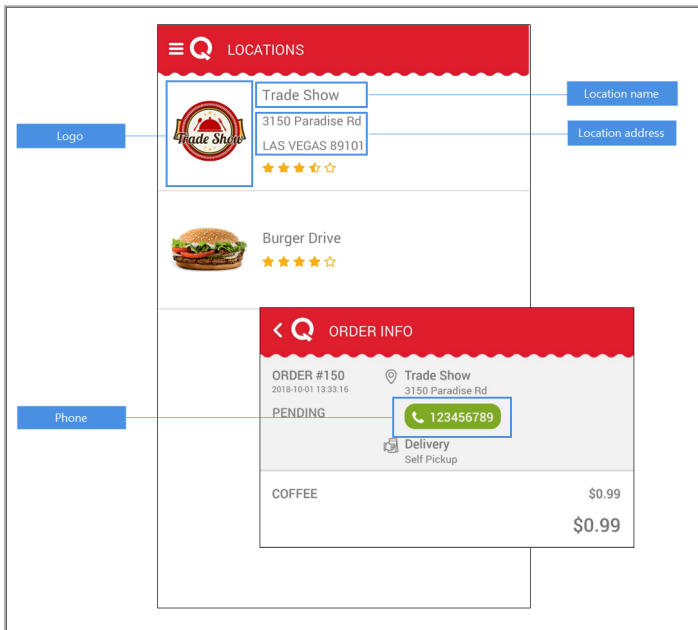
Setting up Location Work Schedule

As part of the configuration process, you need to set up the work schedule for the location. QwickServe Mobile follows location working hours configured in C-Store Office and denies orders made at the time different than the one specified in the schedule.

> During the Pilot period, it is required that you configure an independent work schedule for the QwickServe Mobile location. The *Use station working hours* option is not available.

To configure an independent work schedule that differs from basic location working hours, follow the steps:

1. In the **Mobile application** section, clear the **Use station working hours** check box.
2. Consistently configure the schedule for each day of week. Do the following:
   a. On the right of each row, click the **edit** button.

b. Specify the start and end time of the work schedule. Be sure to use the 24 hours military time format.

c. After you configure the schedule for a specific day of week, click the **enter** button on the right of the row.

3. When you finish configuring the location settings, under the logo in the **Mobile application** section, click the **Save** button.

STEP 2. ALLOW PETROSOFT TO COLLECT PAYMENTS

By default, all locations accept payments only at the POS. The online payments option is shown but not active for your customers. To enable this option and accept online payments from QwickServe Mobile, you need to create a merchant account in the Braintree system and connect it with your Petrosoft account. All processes are automated, you only need to provide the required information as described in this section and pass through the signup form provided by Braintree.

Please note that all information is provided directly to Braintree. Petrosoft does not collect or store your or your customers private data and cards information on its servers and cannot access it.

> ℹ️ *This step is recommended but not required for proper QwickServe Mobile functioning.*

Prerequisites

Before continuing, make sure that you have prepared the next information:

- **Business bank account credentials**. This account will be used to deposit collected payments. You will need to provide your bank account number and routing number for that account.
- **Your business data**, including: taxID, phone, address and legal name.
- **Business representatives personal data**, including: name, home address and social security number.
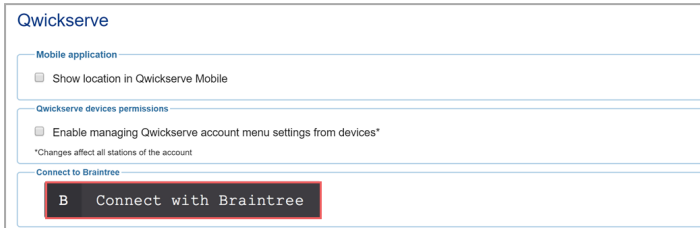
Connecting with Braintree

To start accepting online payments from the QwickServe Mobile application and unblock the corresponding payment option for your customers, you will need to complete the Braintree account setup procedure and link the Braintree account with your Petrosoft account and your locations.

> ℹ️ *Each location requires its own link with the Braintree account. This gives you a great flexibility: you can create one account and link it to all locations, use a separate Braintree merchant accounts for each location, divide locations in groups and link each group to a separate Braintree account and so on.*

To complete the Braintree account setup procedure, follow the steps:

1. Access the QwickServe locations settings form. For more details, see Navigating to QwickServe Settings for Locations.

2. In the **Mobile application** section, navigate to the **Connect with Braintree** button and click it to proceed.

3. When you click the **Connect with Braintree** button, the system redirects you to the Braintree signup form. Confirm that you allow Petrosoft applications to collect payments on your behalf. You can proceed with your PayPal account or create a Braintree merchant account. Different flows are listed below, please select the one that is appropriate for you.
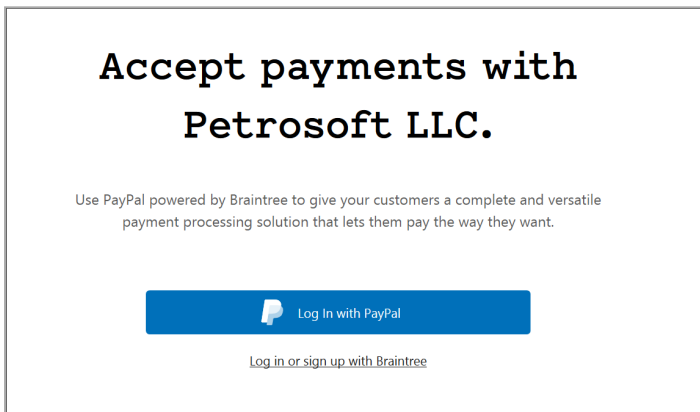
You can use one of the following flows:

- Flow A: Sign up with Braintree
- Flow B: Sign in with Braintree
- Flow C: Log in with PayPal

Flow A: Sign up with Braintree

This flow can be used if you have not created a Braintree merchant account for your locations yet or prefer to use different Braintree accounts for your locations according to your accounting needs.

To sign up with Braintree:

1. In the **Accept payments with Petrosoft** window, click **Log in or sign up with Braintree**.
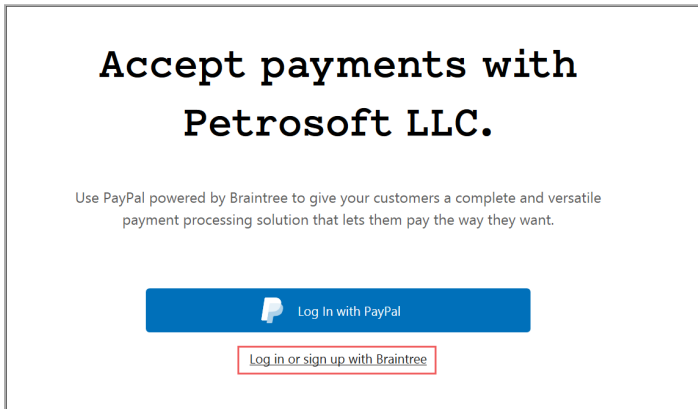
2. At the first step, provide your business email and password that will be used to log in to the Braintree system in future. Agree with the Braintree policies and agreements by clicking **Agree and Create Account**.
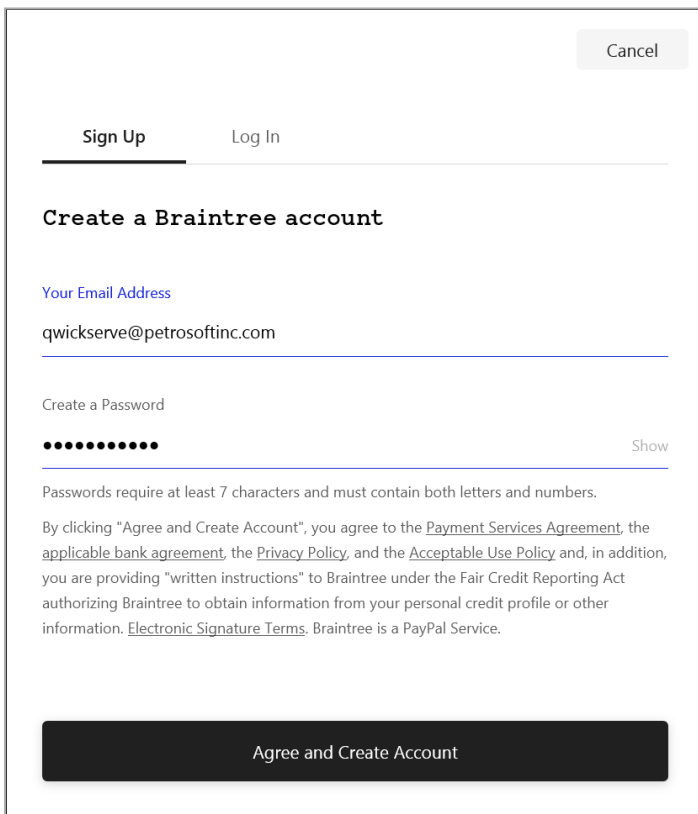
3. At the second step, provide the business information. All fields are required (if not marked as *Optional*). If you do not have a business website, in the **Website** field, specify *http://qwickserve.com*.

4. When you have provided all necessary data, click **Next Step: Contacts** to proceed. If the form contains any incorrect data, a warning message will be displayed.
The correctly filled form must look like the form below:

5. At the third step, provide the personal information and contacts of the authorized business representative. All fields are required.

6. When finished, click **Next Step: Processing** to proceed to the next step.

7. At the next step, Braintree requests information about the processing volumes for its internal use. It is recommended that you leave the form with default values during startup. However, you can provide actual processing information if you want. Do not select the **Yes, I offer subscriptions** check box as QwickServe Mobile does not provide any subscriptions.

8. When finished, click **Next Step: Delivery** to proceed to the next step.

9. At this step, you need to provide information on how you deliver orders and when you charge for them. Select values as specified below:

   o **When do you charge**: Day of Order

   o **When do you deliver**: Within 7 Days

   Other values are possible, but are not recommended for accounts linked with QwickServe.

10. When finished, click **Next Step: Funding** to proceed to the next step.

11. At this step, you need to provide the bank information. It will be used by Braintree to fund your account with collected payments.

12. When finished, click **Next Step: PayPal** to proceed to the next step.

13. Braintree requires that you link the Braintree account with PayPal. At this step, you need to add the PayPal account information and log in to PayPal. Do the following:

   a. To add a PayPal account, click **Add account**. The PayPal sign-in/sign-up form will be displayed in a secure browser window.

   b. In the displayed window, you can select one of the following options:

- **Existing account**: If you already have an account that you would like to link with Braintree, enter the user name and password of this account and click **Log In**.
- **New Account**: If you want to create a new PayPal account, click **Sign Up**.
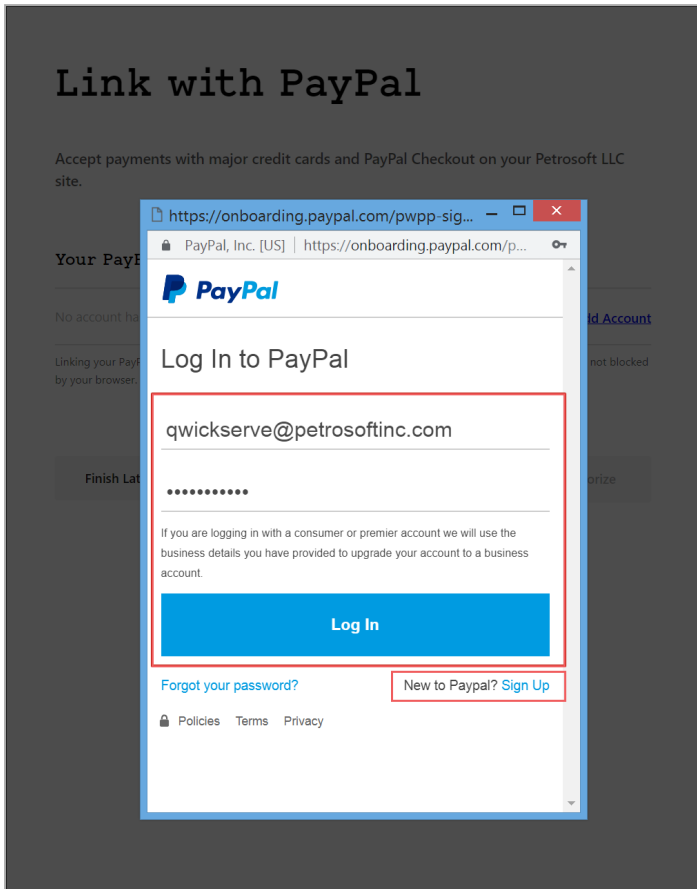
In the displayed window, click **Continue** to confirm that you agree to pass the information previously entered in the Braintree signup form to PayPal.
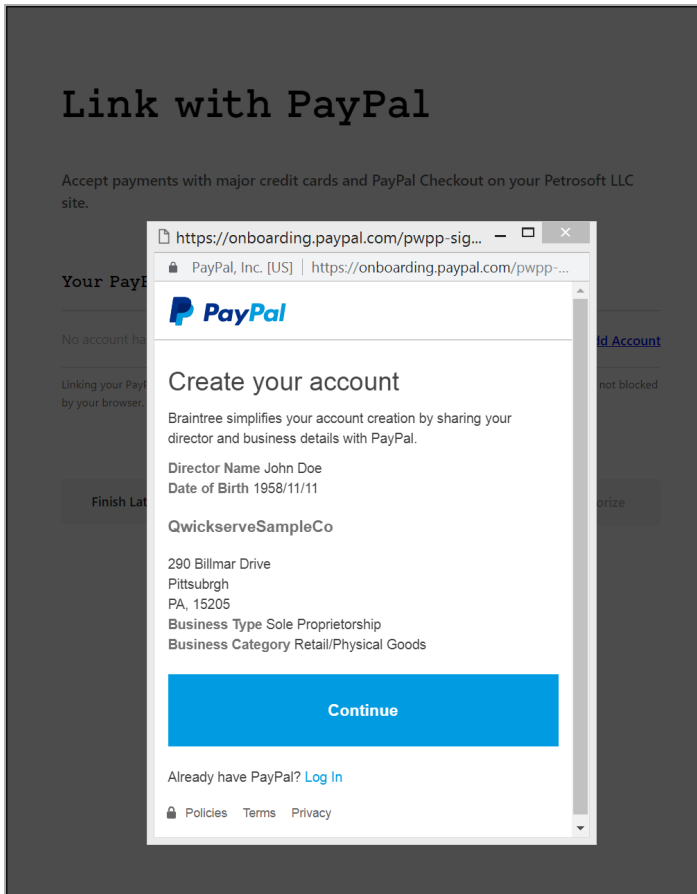
Specify an email and password for the PayPal account. By default, the email is the same as the one provided for Braintree, but it can be changed. When ready, click **Continue** to return to the Braintree form.
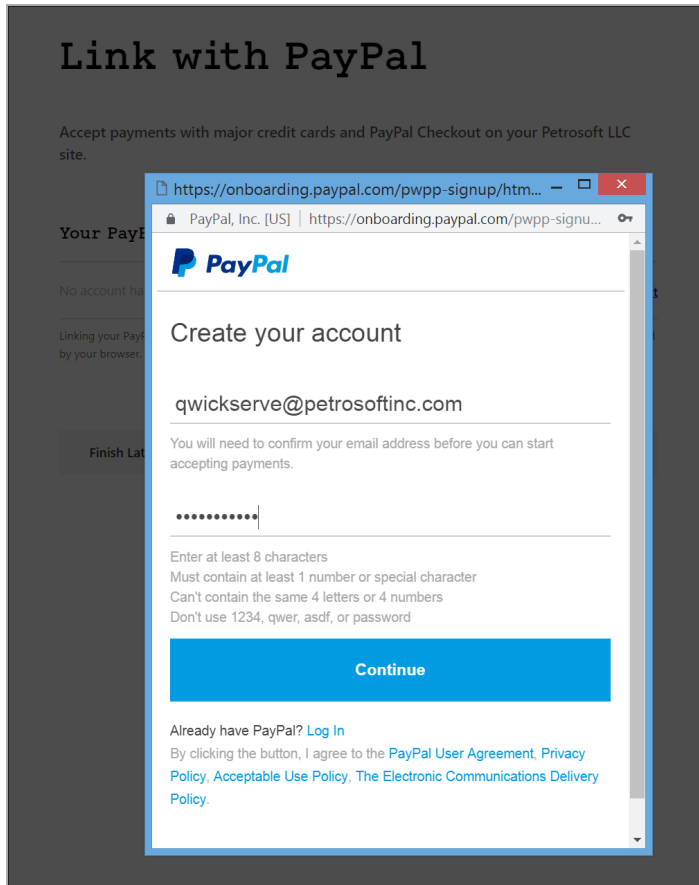
14. To finish linking a new or existing PayPal account with Braintree, click **Last Step: Authorize**.
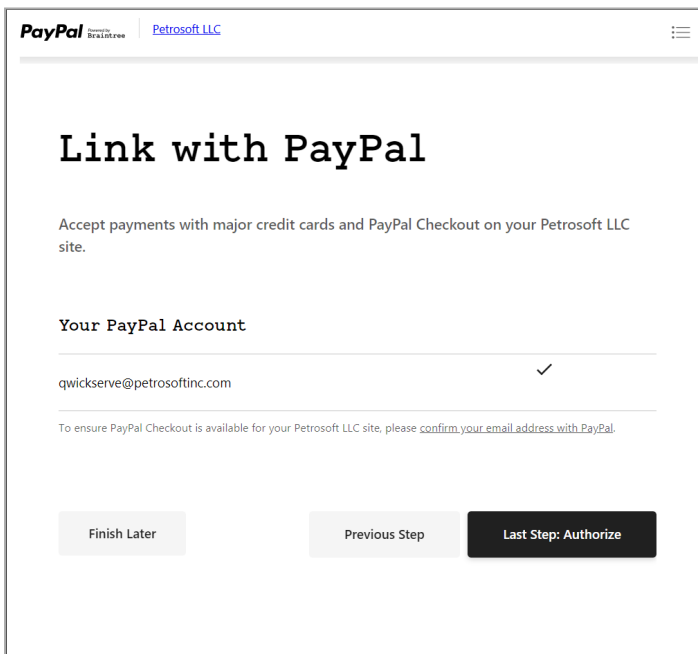
15. At the final step, you are requested again to authorize Petrosoft LLC to access your account in order to collect payments from QwickServe Mobile. Braintree displays a list of required permissions. Click **Authorize Access** to complete.
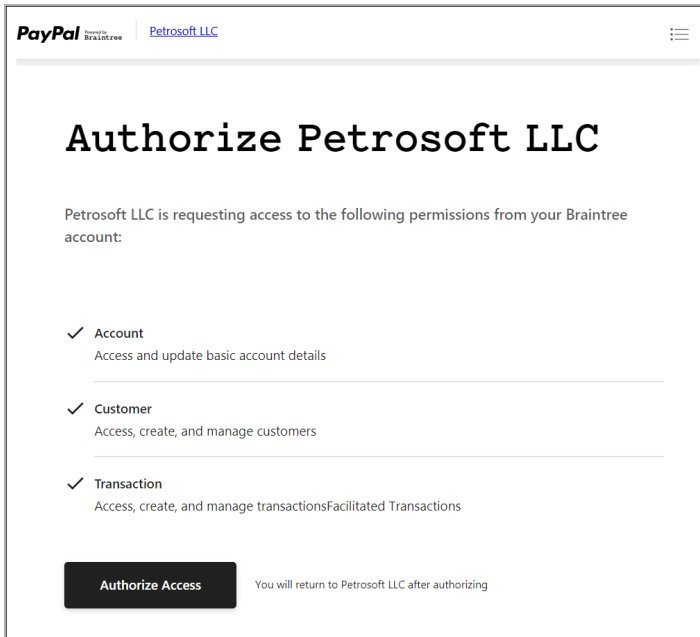
16. Wait for some time while Braintree is processing the information.

When Braintree has processed the information, you are redirected back to the Petrosoft QwickServe location settings form. If the account is linked successfully, in the **Connect to Braintree** section, the following note is displayed: *You are already connected*.
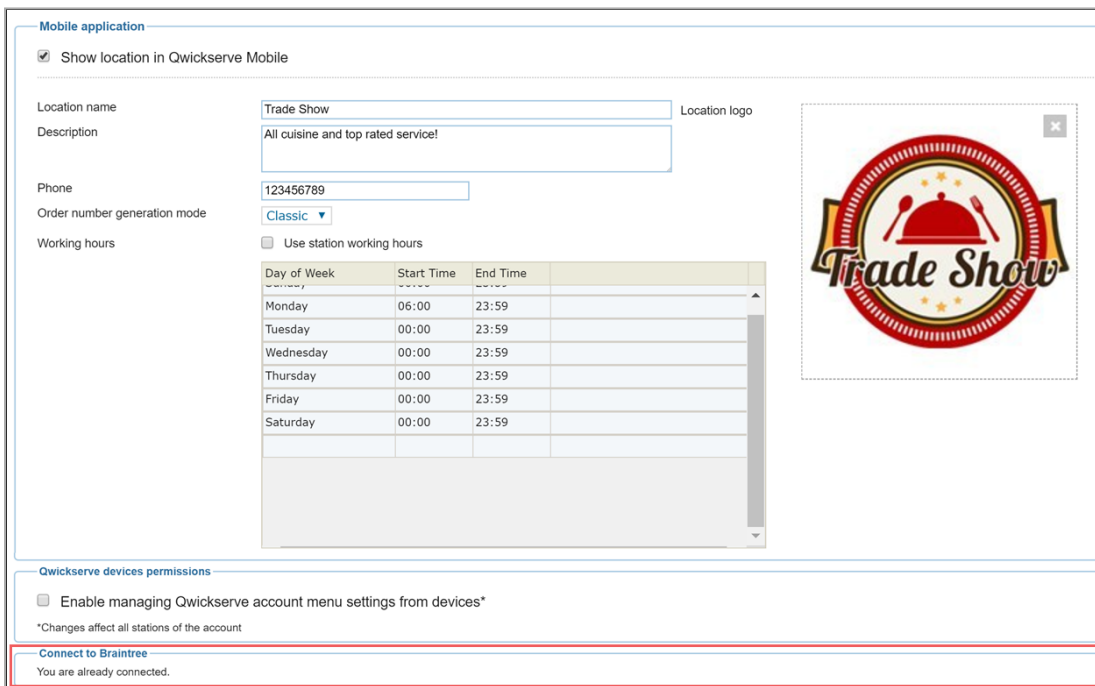
Flow B: Sign In with Braintree

This flow can be used if you need to link an existing Braintree merchant account with a location.

If you already have a Braintree merchant account, you do not need to create a new one. It is possible to link an existing Braintree merchant account with the Petrosoft Cloud account and start accepting payments from QwickServe Mobile.

To sign in with Braintree:

1. In the **Accept payments with Petrosoft** window, click **Log in or sign up with Braintree**.

   ## Accept payments with Petrosoft LLC.

   Use PayPal powered by Braintree to give your customers a complete and versatile payment processing solution that lets them pay the way they want.

   [**P** Log In with PayPal]

   [Log in or sign up with Braintree]

2. Click the **Log In** tab and provide you Braintree access credentials.

   Cancel

   Sign Up   **Log In**

   Log into your Braintree account

   Braintree Username

   Your Braintree username may be your email address.

   Braintree Password

   Forgot your password? Change your login.

   [Log In]
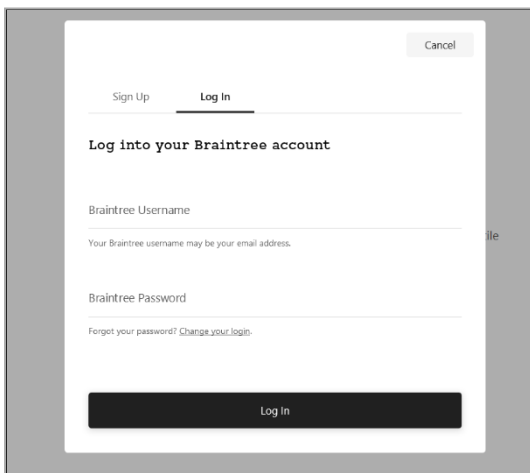
3. If logon is successful, you are requested again to authorize Petrosoft LLC to access your account in order to collect payments from QwickServe Mobile. Braintree displays a list of required permissions. Click **Authorize Access** to complete.
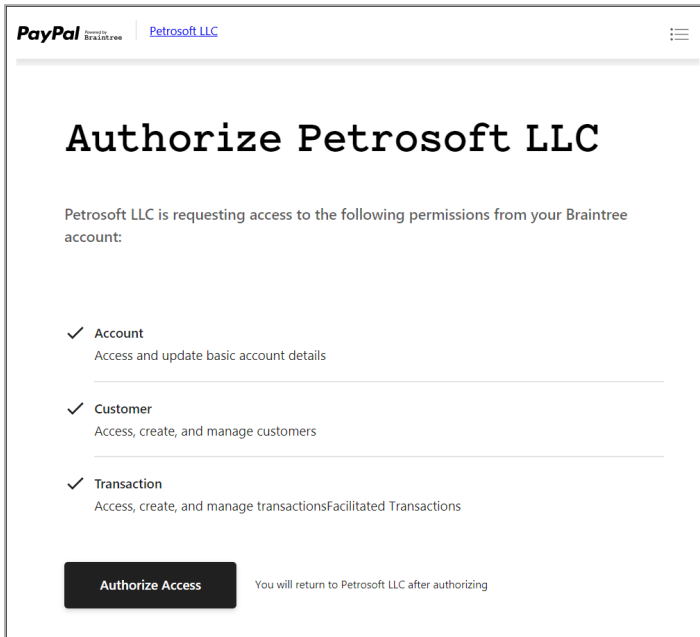
When Braintree has processed the information, you are redirected back to the Petrosoft QwickServe location settings form. If the account is linked successfully, in the **Connect to Braintree** section, the following note is displayed: *You are already connected*.
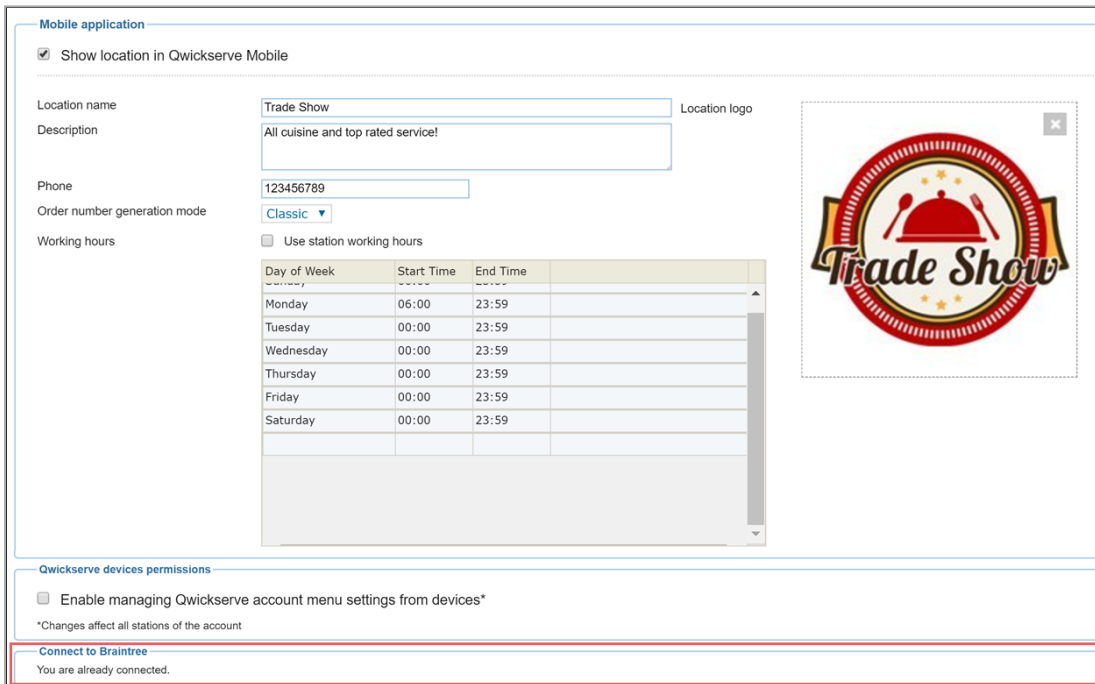
Flow C: Log in with PayPal

This flow can be used to create a Braintree account using an existing PayPal account, to reduce the account setup time.

To log in with PayPal:

1. In the **Accept payments with Petrosoft** window, click **Log in with PayPal**.

Accept payments with
Petrosoft LLC.

Use PayPal powered by Braintree to give your customers a complete and versatile
payment processing solution that lets them pay the way they want.

    P   Log In with PayPal

Log in or sign up with Braintree

2. At the **Log in with PayPal** step, enter the PayPal email and password.

    P PayPal
    Log in with PayPal

    qwickserve@petrosoftinc.com   Change

    Password

    Log In

    Having trouble logging in?

    or

    Sign Up

3. If logon is successful, a confirmation page is displayed. Click **Agree** to confirm that you agree that Braintree uses the information provided in your PayPal account for Braintree account creation.
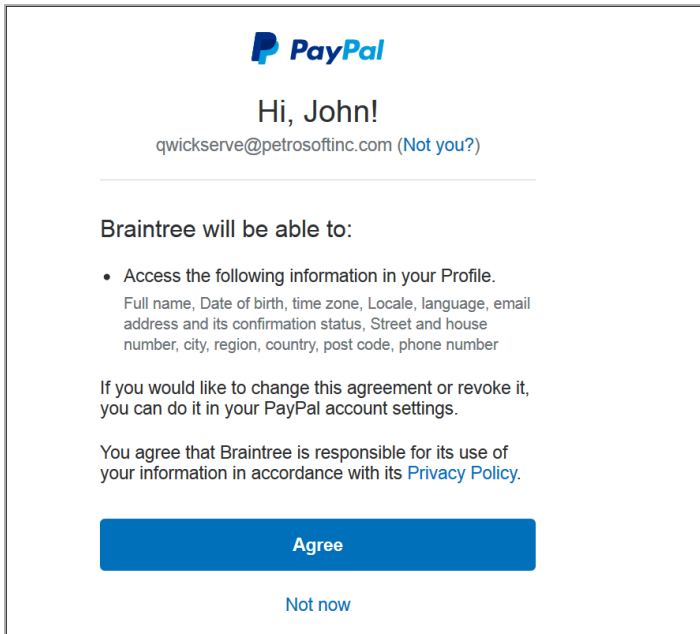
4. Wait for some time while Braintree is processing the information.

   When Braintree has processed the information, you are redirected back to the Petrosoft QwickServe location settings form. If the account is linked successfully, in the **Connect to Braintree** section, the following note is displayed: *You are already connected.*
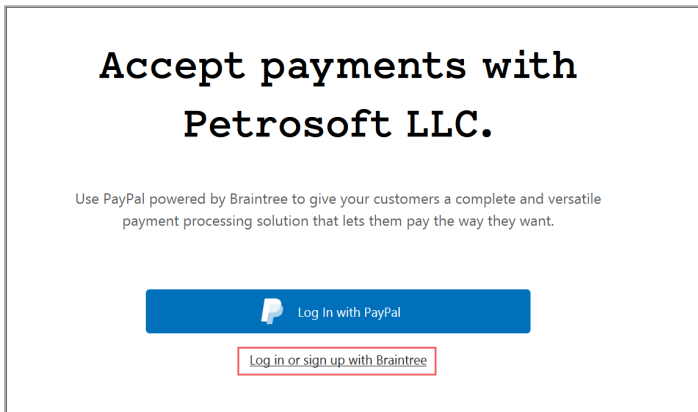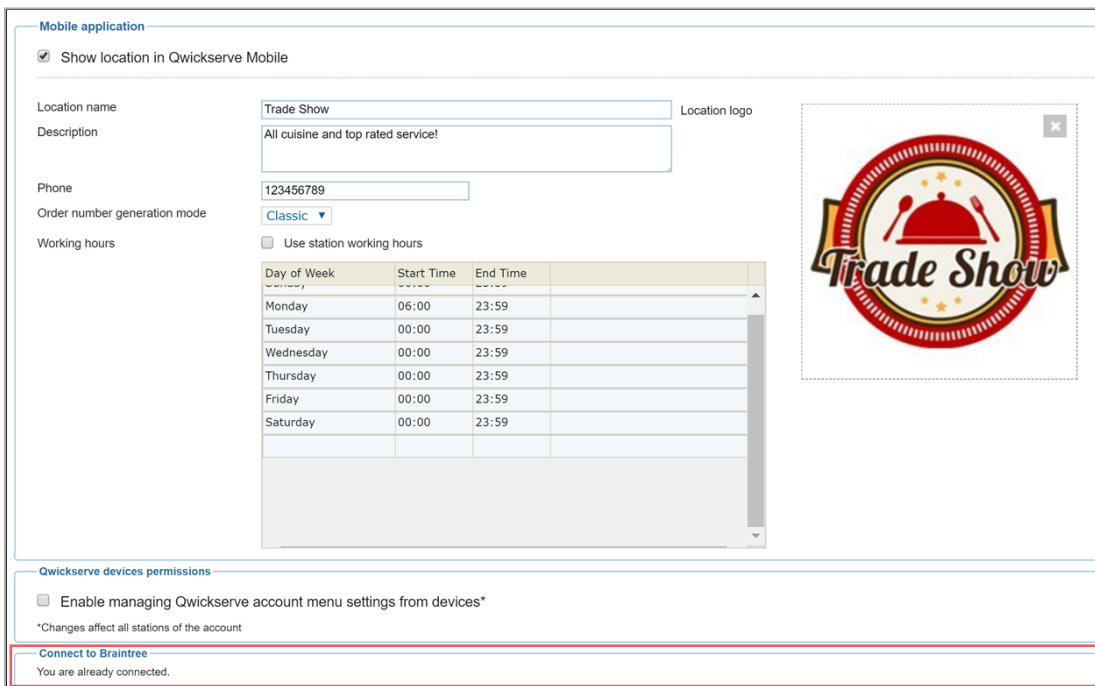
STEP 3. UPDATE QWICKSERVE DEVICES CONFIGURATION

To accept QwickServe Mobile orders, you need to update software on your SSOT and KDU devices to the latest beta version and change several device settings in the administrative interface.

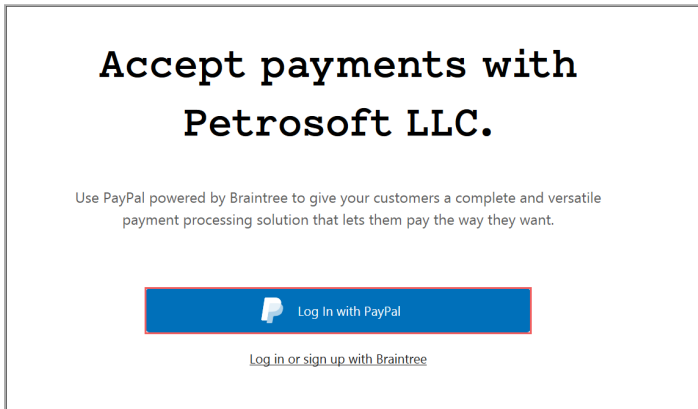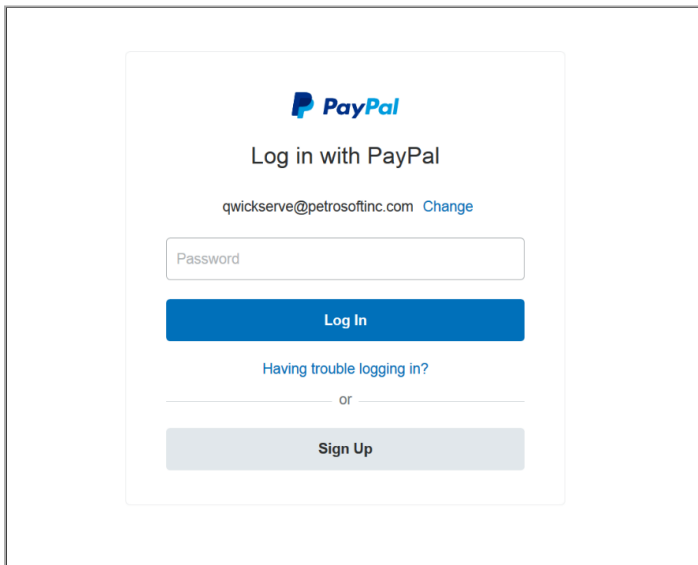> *The remote ordering functionality is currently in the Pilot stage, which means that small and medium changes can be introduced before the functionality goes to production.*

To update your devices, open the next links in your device web browser and download the applications.

- For KDU, use this download link: https://qsapi.petrosoft.cloud/downloads/kdu/beta/
- For SSOT, use this download link: https://qsapi.petrosoft.cloud/downloads/ssot/beta/

When the application is installed, open the application, activate it with the correct PIN code and open the administrative interface.

To do this, follow the steps:

1. At the top of the screen, tap and hold on the red stripe and wait until the login screen is displayed (approximately for 5 seconds).
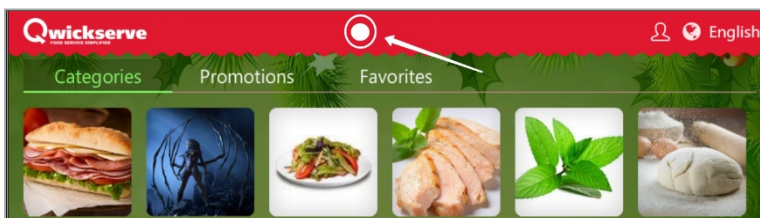
2. On the login screen, select a user with owner access rights and enter his or her PIN to authorize in the administrative interface.
   If no users are displayed on the login screen, set up QwickServe PIN codes for users in the BO employee management interface. For more information on how to configure users with access to the QwickServe administrative interface, see QwickServe Users at Petrosoft Cloud Help.

3. In the administrative interface, click the **App** tab and configure the application to use both the **Beta** backend and **Beta** updates channel.

4. (Optional) On the SSOT device, you can configure the SSOT to show the mobile application promotion. Do the following:
   a. Click the **SSOT** tab.

b. Select the **Show Mobile App Promo** check box.
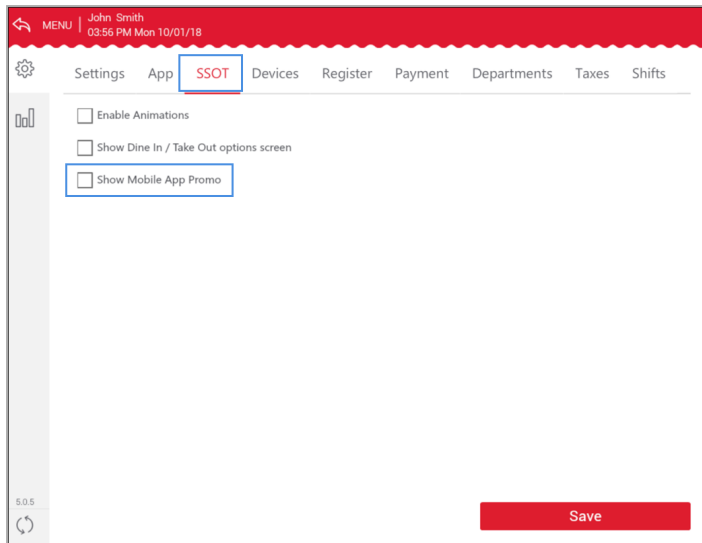
STEP 4. CONFIGURE QWICKSERVE MOBILE AND CHECK CONFIGURATION

> 🅸 *During the Pilot period, Braintree payments work in the demo mode. The corresponding option is displayed in the payment options list in the QwickServe Mobile application, but actual payments are not handled through Braintree and collected to your account.*

At this step, you need to install the QwickServe Mobile application on your mobile devices. You can also optionally prepare a list of locations IDs and specify these locations IDs in QwickServe Mobile. With this option configured, only the specified locations will be displayed in the locations list in QwickServe Mobile.

To download the mobile application from Google Play Market or Apple App Store, search for QwickServe or use the direct links below:

- Google Play Market:

    https://play.google.com/store/apps/details?id=air.com.petrosoftinc.qwickserve.QwickserveMobile

- Apple App Store: https://itunes.apple.com/us/app/qwickserve/id1223394900

To configure QwickServe to show only your locations, follow the steps:

1. Prepare a list of location IDs. You can get the IDs from the locations list in cloud. To do this, follow the steps:

    a. At the top right corner of the C-Store Office home page, click your account name and select **General** > **Locations**.
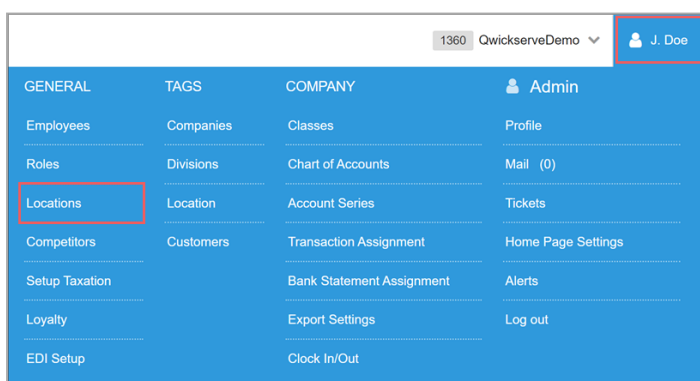
    b. In the **Locations** list, check the **Id** column and note IDs of the locations that you want to display in QwickServe Mobile.

Locations						Search
						Refresh Add Edit Delete

Id	Name	Status	Division	Company	
9125	Qwickserve_Nucleus	enabled		QwickServeDemo	
7835	Qwickserve_Passport	enabled			
7812	Qwickserve_Radiant	enabled			
7810	Qwickserve_Ruby	enabled			
7811	Qwickserve_Sapphire	enabled			
5722	Qwickserve_SmartPOS100	enabled		QwickServe	
7826	Qwickserve_SmartPOS400	enabled			

2. In QwickServe Mobile, tap the main menu button and open the **About** menu.

≡ Q LOCATIONS

👤 PROFILE

🕐 ORDERS HISTORY

♡ FAVORITES

ⓘ ABOUT
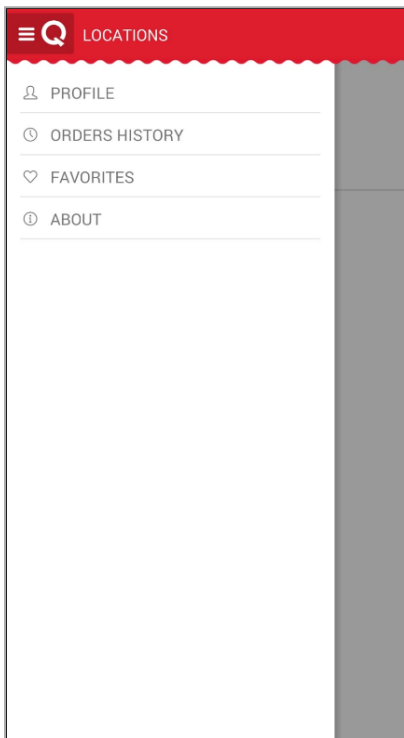
3. Tap 5 times on the QwickServe logo.
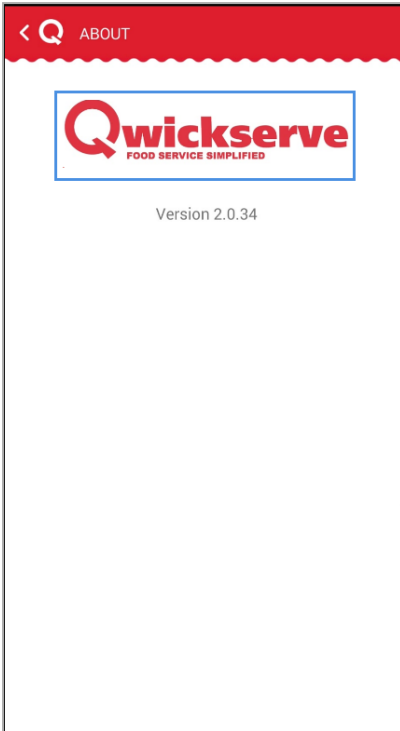
4. In the **Show your Pilot locations** field, enter IDs of locations separated with a comma and then click the **Save** button.
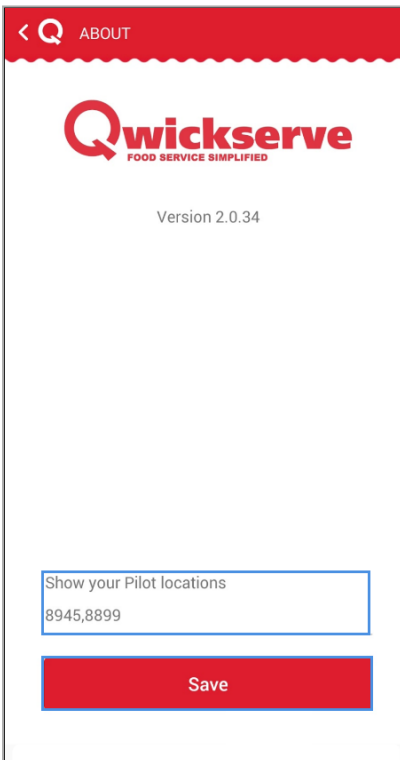
Result: Only the specified locations are displayed in the locations list in QwickServe Mobile.

TROUBLESHOOTING

Issue	Solution
Location is not shown in the locations list in QwickServe Mobile.	Refer to Step 1. Configure Location Settings for QwickServe Mobile and the QwickServe Mobile location settings form in BO. Check if the next parameters are configured: 1. The location is marked to be shown in QwickServe Mobile. 2. The location is configured with a name and logo. 3. The location settings are saved.

A location is shown, but I cannot place an order, the application says "*Location is offline*".	Such message may appear in several cases:
	
	1. The location is not configured with the work schedule, check if everything is done as described in Setting up Location Work Schedule.
	2. The current time is not inside the work schedule intervals, in this case, it is the correct behavior.
	3. A connection from BO to KDU is missing and the system cannot deliver an order to the location KDU. Do the following:
	   a. Check the location internet connection.
	   b. Check if DC BOX is powered on and works correctly.
	   c. Check if KDU is online and operating.

Only the **Pay at register** option is available at checkout.	Check if your account is linked with Braintree and the **Connected with Braintree** state is displayed instead of the **Connect with Braintree** button. For more details, see Allow Petrosoft to Collect Payments.

GLOSSARY

Add-on – additional items that are recommended to be purchased with the particular item (e.g. cup of coffee as an add-on item to the cheeseburger).

Administrator PIN – user PIN assigned on the C-Store Office side when the QwickServe user is created. This PIN is used for accessing the Administrator's Panel of the QwickServe terminal.

Braintree – a gateway between a consumer and a merchant bank account helping to accept and process payments in the QwickServe Mobile application.

Category – placeholder for the group of items to be sold within it.

Cost method of accounting (CMA) – this method is used for items containing several ingredients that were bought separately and are combined and sold within a recipe item. A cheeseburger, for example. Under this method, merchandise additions are made at cost value and no retail value.

Ingredient – item purchased in one form and sold in combination with the other items (e.g. cheese purchased as a wheel of cheese and sold as a portion of cheese within a cheeseburger).

KDU – kitchen display unit, a QwickServe device that provides foodservice operators with a workflow and information to complete orders. KDUs allow operators to present complete preparation instructions for items and orders, displaying detailed information about ingredients, preparation steps and specific cooking time.

Menu – set of item categories and items within them to be sold via the QwickServe device.

Online payments – payments for QwickServe orders collected directly in the QwickServe Mobile application. An online payment can be done using a credit or debit card.

Recipe costing – see Ingredient method of accounting.

Recipe item – made-to-order item with the fixed base ingredients and customizable sets of ingredients and add-ons.

Regular item – item from the Price Book sold as is.

Retail method of accounting (RMA) – this method calculates a store's total inventory value by taking the total retail value of the items that were originally in inventory, subtracting the total sales, and then multiplying that dollar amount by the cost-to-retail ratio (the percentage by which goods are marked up from their wholesale purchase price to their retail sales price).

QwickServe Mobile – a QwickServe application for iOS or Android created to allow customers to make their order remotely.

Set of ingredients – set of items user can select for his customizable made-to-order (recipe) item.

SSOT – self-service ordering terminal enabling users to place orders themselves. Once orders are placed at the SSOT, they become visible at QwickServe KDUs.

Subcategory – placeholder for the group of items located within another category (e.g. "Breakfast" subcategory within the "Holiday QS Menu").

Terminal PIN – device PIN assigned on the C-Store Office side when the device is created. This PIN is used for accessing QwickServe terminal when you launch it first time after installing the QwickServe Terminal application.

Tier pricing ranges – charging different quantity ranges of ingredients at different prices.

User PIN – a PIN received by the user to the phone number for getting access to user's favorites on the Customer's panel of the QwickServe terminal.