



# JURA Pocket Pilot 2.0

Instructions for use

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# 1 Information on using the instruction manual

## 1.1 Symbols

► An arrow before a sentence indicates an action.

## 1.2 Designations

Menu items

Buttons

Tabs

The screenshot shows a web interface for managing a coffee menu. On the left is a vertical sidebar with menu items: Dashboard, Coffee Machines, Coffee Menus, Setup, User Management, Help, and Exit. A red box highlights this sidebar, with a red line pointing to the 'Menu items' label. The main content area has a title 'Coffee Menu Default GIGA X8 (EA) AuthorizedAccess Mode' and a subtitle 'You can choose the tabs below to setup or edit options for the related coffee menu.' Below the subtitle are three tabs: Overview, Products, and Machines using this menu. A red box highlights these tabs, with a red line pointing to the 'Tabs' label. Under the 'Products' tab, there is a '+ Add Product' button and an 'Edit product order' link, both highlighted with red boxes and a red line pointing to the 'Buttons' label. The main area displays a grid of coffee products, each with an 'Enabled' checkbox and an image of the drink. The products are: Espresso (disabled), Coffee (enabled), Ristretto (disabled), Café au lait (enabled), Macchiato (enabled), Espresso doppio (enabled), Latte macchiato (enabled), and Hot water for green tea (enabled).

## 2 Initial configuration

### 2.1 Requirements for using JURA Pocket Pilot:

- Compatible automatic speciality coffee machine
- JURA Payment Connect (plus an additional one if Cool Control is used)
- JURA Pocket Pilot Account
- PC or laptop with an Internet connection
- Smartphone

### 2.2 Creating an account

- ▶ Create an account at <https://pocketpilot.jura.com/>.
- ▶ Enter your email address and create a new password.
- ▶ Check your email inbox and confirm your email address.

### 2.3 Creating your own company

- ▶ Enter the name and location of your company and select a currency.
- ▶ Click on **Save**.

### 2.4 Adding an automatic speciality coffee machine

- ▶ Click on the **Automatic coffee machines** programme item.
- ▶ Click on the **Add JURA automatic coffee machine** button.
- ▶ Follow steps 1 to 5.

### 2.5 Creating a product selection for the automatic speciality coffee machine

- ▶ Click on the **Product selections** programme item.
- ▶ Click on the **Add product selection** button.

### 2.6 Adding a payment method

- ▶ Click on the **Setup** programme item.
- ▶ Click on the **Payment** tab.
- ▶ Select a payment method from the drop-down menu.

## 3 Dashboard

The dashboard provides you with an overview of consumption data at all times. Add further widgets or edit the ones already shown.

### Adding a widget

- ▶ Click on the “Add widget” button.

#### 3.1 Setting options when adding a widget

##### Automatic speciality coffee machines

- ▶ Filter the results according to available automatic coffee machines. The drop-down menu shows all available locations and automatic coffee machines.

##### Title

- ▶ Enter a name for your widget.

##### Subtitle

- ▶ Enter a subtitle for your widget.

##### Measured value

- ▶ Choose from a list of possible key figures: Product preparations in general, according to product category or for a specific product, or according to turnover.

##### Measurement value time period

- ▶ Choose from daily, weekly, monthly or yearly.

##### Shown as

- ▶ Select whether the values shown should be absolute, relative (as %) or both.

## 4 Automatic speciality coffee machines

All your JURA automatic coffee machines can be managed here (add and edit automatic coffee machines) and the results filtered according to location.

### 4.1 Adding a JURA automatic coffee machine

- ▶ Click on “Add JURA automatic coffee machine”.
- ▶ Follow steps 1 to 5.

### 4.2 Editing an automatic coffee machine

- ▶ Click on the automatic coffee machine you wish to edit.

#### Overview tab

Shows various information about the automatic coffee machine, such as model, location, PIN and serial number.

#### P-mode PIN

This PIN provides you with access to the settings of your automatic coffee machine.

#### Maintenance PIN

The maintenance PIN only provides access to the maintenance menu of the automatic coffee machine, not to the settings.

#### Configure tab

#### Preselection mode

Select a preconfigured operating mode for the automatic coffee machine. The corresponding product selections and user groups are created automatically as required and selected for the automatic coffee machine:

#### Open

The automatic coffee machine is accessible to everyone and the products are free of charge. The QR code is shown on the display and the users can prepare products using the JURA Pocket Pilot.

#### Prepaid

The automatic coffee machine is only accessible to certain users. Under the **User Management** programme item, add and remove users, and assign automatic coffee machines to them. The products have a set price and the users purchase the products by means of credit. The users can purchase their credit in the JURA Pocket Pilot to top up their credit balance. A payment service provider must first be saved in order for this to be possible, see **Chapter 6 „Zahlungsmethode hinzufügen“**. The top-up amount can be determined by the person managing the automatic coffee machine.

#### Authorised access

The automatic coffee machine is only accessible to certain users. Under the **User Management** programme item, add and remove users, and assign automatic coffee machines to them. The products are freely available to these users. If a user does not have access, they cannot use this automatic coffee machine. The QR code is shown on the display and the users can prepare products using the JURA Pocket Pilot.

## Payment

The automatic coffee machine is accessible to everyone and the products have a fixed price. The QR code is shown on the display and the users can prepare and pay for products using the Coffee app.

## User-defined

In this mode, tailored product selections with individual recipes and prices can be assigned to various user groups.

## Location

- ▶ Select the location for the automatic coffee machine. Locations can be created and edited in the [Setup](#) programme item.

## Removing an automatic coffee machine

- ▶ Remove the automatic coffee machine from this account by clicking on the [Remove automatic coffee machine](#) button. **Please note:** removing the coffee machine will also delete all usage data for this machine.

## 4.3 Configuration of “Open” preselection mode

- ▶ Select the desired automatic coffee machine and click on the [Configuration](#) tab.
- ▶ Select the **Open** preselection mode.
- ▶ Click on **Save**.

## 4.4 Configuration of “Prepaid” preselection mode

- ▶ Select the desired automatic coffee machine and click on the [Configuration](#) tab.
- ▶ Select the **Prepaid** preselection mode.
- ▶ Click on **Save**.

Under [Product selections](#), a new selection for Prepaid mode has been created. In this menu, changes can be made to the prices and recipes. Do you want your users to be able to top up credit themselves? Then add your payment provider (API key):

- ▶ Click on the [Setup](#) programme item.
- ▶ Then click on the [Payment](#) tab.
- ▶ Enter the required API key.

**i** The API key is available from your payment provider. A webhook must be created once.

## 4.5 Configuration of the “Authorised access” preselection mode

- ▶ Select the desired automatic coffee machine and click on the [Configuration](#) tab.
- ▶ Select the **Authorised access** preselection mode.
- ▶ Click on **Save**.

A new standard user group for “Authorised access” mode has been created at the location of the automatic coffee machine. An automatically generated standard product selection is used, which is in “Open” mode. Only users who are in the user group generated have access to the products.

## Regular credit top-ups

The operator/person managing the machine can credit certain user groups with a defined amount at regular intervals.

- ▶ Click on the **User Management** programme item.
- ▶ Then click on the **User Groups** tab.
- ▶ Click on the **three dots** beside the desired user group.
- ▶ Click on **Edit**.
- ▶ Set the checkbox for **“Regular credit top-ups”** to **active**.
- ▶ Define the top-up interval, time and amount.
- ▶ Click on **Save**.

## 4.6 Configuration of “Payment” preselection mode

- ▶ Select the desired automatic coffee machine and click on the **Configuration** tab.
- ▶ Select the **Payment** preselection mode.
- ▶ Click on **Save**.

A new, preset product selection has been created in Payment mode as required.

## 4.7 Configuration of “User-defined” preselection mode

- ▶ Select the desired automatic coffee machine and click on the **Configuration** tab.
- ▶ Select the **User-defined** preselection mode.
- ▶ Click on **Save**.

You now have the option of setting up the standard product selection, for which no account is required, and the product selections for the various user groups.



## 5 Product selections

Manage your product selections and speciality beverages here.

### 5.1 Adding product selection

- ▶ Click on the **Add product selection** button.
- ▶ Select an automatic coffee machine.
- ▶ Enter a name for the product selection.
- ▶ Click on **Save**.

### 5.2 Editing the product selection

- ▶ Click on **Display** to edit the details of the product selection.

#### Products tab

The following actions can be taken here:

#### Adding a product

- ▶ Click on the **Add product** button.
- ▶ Enter a name for the product.
- ▶ Determine a price for the product.
- ▶ Select a product type from the drop-down list.
- ▶ Click on **Save**.

#### Editing the order of products

- ▶ Click on the **Edit order of products** button.
- ▶ Drag and drop the product in the desired position using the mouse.
- ▶ Click on **Save**.

**i** This product order will also appear on the Coffee app.

#### Checkbox

Every product is activated as standard, shown by the checked box. Uncheck the box to remove this product from the Coffee app.

#### Editing the product

- ▶ Click on the product image to make changes to the product.
- ▶ Change the name, price or recipe.
- ▶ Click on **Save**.

#### Overview tab

The name and operating mode of the product selection selected can be edited here. A link for sharing the product selection can also be created.

#### Automatic coffee machines that use this product selection tab

List of all the automatic coffee machines that use this product selection.

## 6 Setup

The following basic settings can be saved under the **Setup** programme item:

### Locations tab

Create an overview of your locations. Every location shows the number of automatic coffee machines and the respective number of users. New locations can be added or changes made to existing ones.

### Payment tab

Payment methods can be added or changed here.

### Adding a payment method

JURA Pocket Pilot can be connected to a payment provider using API. Stripe, Global Payments, Alipay and Saferpay are currently supported.

- i** In order to be able to accept payments with JURA Pocket Pilot, you need a user account with one of the payment providers listed above.

### Where to find your API key (taking Stripe as an example)

- ▶ Read through the documentation provided by Stripe to find out where you can find your API key.

### How to create a webhook

- ▶ Login with your user data to <https://dashboard.stripe.com/login>.
- ▶ Go to <https://dashboard.stripe.com/webhooks>.
- ▶ Click on **Add endpoint** at the top-right of the screen.
- ▶ Enter <https://backend.pocketpilot.jura.com/api/stripe-webhook> in the endpoint URL.
- ▶ Click on the button and select the events to be monitored.
- ▶ In the drop-down list, click on **Payment purpose** and then on **Select all payment purpose events**.
- ▶ Then click on **Add events** lower down the list.
- ▶ Click on the **Add endpoint** button.
- ▶ Click on the endpoint URL that you just created and then click on **Reveal signing secret** in the middle of the page.
- ▶ Copy the secret key and enter it in the signing secret webhook field on JURA Pocket Pilot.

### Operator tab

Operators manage your automatic coffee machines and JURA Pocket Pilot. Add additional administrators, user managers, product managers or reporters here. Users/consumers can be managed under the **User Management** programme item.

### Credit top-up tab

**Credit top-up** is required for **Prepaid** mode so that users can purchase credit themselves. You determine the credit amounts that will be available to the users.

- ▶ Click on the **Add credit top-up** button.
- ▶ Enter the desired amount.
- ▶ Click on **Save**.

### Company tab

Under the **Company** tab, changes can be made to the company name and currency.

## 7 User management

View the information for user management and change user settings. Consumer/revenue statistics can also be shown here.

### Users tab

#### Adding users

- ▶ Click on the **Add consumer** button.
- ▶ Enter the email address of the consumer.
- ▶ Click on **Save**.

#### List of users

The list of users can be sorted according to each column header.

#### Actions column

Assign automatic coffee machines to each user, edit their role, change their data or delete the user. In Prepaid mode, you can view the current credit amount of each user and also top this up manually.

#### User roles

There are six user roles:

##### **Administrator**

Has full access to all areas.

##### **Consumer**

Cannot access the JURA Pocket Pilot dashboard. Can only prepare specialities.

##### **User Manager**

Can invite users and assign automatic coffee machines to them.

##### **Product Manager**

Can manage widgets and all the company's automatic coffee machines and edit the location of a company.

##### **Owner of the automatic coffee machine**

Can manage their own automatic coffee machine and view its statistics and widgets.

##### **Reporter**

Can manage widgets and view statistics relating to their company.

### Consumption tab

Click on the **Consumption** tab to view the general information concerning consumer behaviour. Consumption can be filtered according to location, user group, product selection or timeframe.

## User groups tab

Here, you can select various automatic coffee machines or product selections for specific groups of people. If your automatic coffee machines are operated in the **Authorised access** preselection mode, user groups will be created here. Groups can be defined and created by the user with the **User-defined** preselection mode. Under User Management, users can be divided among the user groups created here.

## Verification tab

The Administrator can authorise/verify user queries here and also assign user roles.

- ▶ Click on the checkbox so that a checkmark appears.
- ▶ Select a user role from the drop-down menu.
- ▶ Click on the **Mark selected user as verified** button.