

Oracle® Retail MICROS Stores2
Functional Document
Fidelity - Card Expiration Management
Release 1.33

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TECHNICAL DOCUMENTATION

Stores2 - 1.33.0 - Fidelity - Card expiration management

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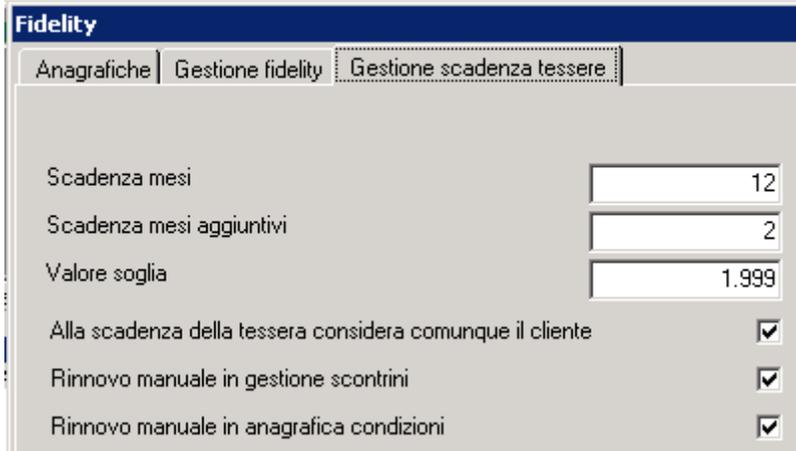
1 Introduction

This function is used for defining the rules for automatic and manual renewal of fidelity cards.

2 Card expiration management

2.1 Configuration

A "Card expiration management" section has been added to the fidelity master data containing the following information:



Fidelity	
Anagrafiche Gestione fidelity Gestione scadenza tessere	
Scadenza mesi	12
Scadenza mesi aggiuntivi	2
Valore soglia	1.999
Alla scadenza della tessera considera comunque il cliente	<input checked="" type="checkbox"/>
Rinnovo manuale in gestione scontrini	<input checked="" type="checkbox"/>
Rinnovo manuale in anagrafica condizioni	<input checked="" type="checkbox"/>

- Months before expiration: months after which, starting from the issue date, the card expires;
- Additional months before expiration: months used to extend the card validity, after which the card actually expires;
- Threshold value: if the customer reaches this threshold, in the total calculation of the purchased value, at the expiration date (after the first 12 months) the card will have an unlimited validity;
- When the card expires consider the customer anyway: flag to allow registering the sale to the customer despite the card being expired.
- Manual renewal in receipt management: at the expiration date, when the card is first read, the user is asked if he/she wants to renew it.
- Manual renewal in condition master data: displays a button for performing the renewal on the card condition master data;

2.2 Operation

2.2.1 Customer master data

The fidelity master data can be configured so that, during the confirmation (or creation) phase of a customer, a record is generated in the FidelityCondizioni table. This record corresponds to the card which is registered when creating a fidelity customer. To date the card expiration was calculated by considering the number of months indicated in the fidelity master data. This information is also used to calculate the validity of the promotions of particular managements such as: plafond discounts, discount scale, point management and management by

parameter. With this change, to define the card validity period, we will only use the new information: the number of months to add to the validity start date and the number of months that the card validity will continue.

2.2.2 Receipt management

In receipt management, when a fidelity card is read the program will check its validity. If the card is expired and in the previous validity period the customer has made purchases for an amount over the threshold configured in the fidelity master data, Stores2 will assign an unlimited validity to the card. Only fidelity sales present in the local database will be considered for calculation of the accumulated value. Specifically, we will add the value registered in the "ValoreNetto" field of the "FidelityMovimenti" table. This means that all the records will be considered, obviously those corresponding to the customer's card, present in the database regardless of the store where they were registered. The presence of records registered in other stores will depend on the sorting procedures. To extend the validity, a new FidelityCondizioni record will be created where the validity start date corresponds to the receipt date and the validity end date will be assigned a value with the constant "31/12/9999". If the customer has not exceeded the threshold, the expiration will be extended by the number of months set in the master data (Additional months before expiration). Again in this case a new record will be created in the FidelityCondizioni table. The new expiration date will be calculated by adding the number of additional validity months to the previous expiration date. The "StatoScadenza" field set to "0" by default, will have a "1" value assigned. If despite the extension, the card is expired, then it will not be accepted. If, at master data level, the "ScadenzaConsideraIntestatarario" flag is enabled, Stores2 will not accept the card but will let the owner be associated with the sale. If the operator decides not to continue the sale, the information related to the expiration will still be maintained, so that it can be used for later sales and transmitted to the head office and other stores to which it should be sent according to the data sorting rule. We decided to add a "StatoScadenza" field in the FidelityCondizioni table to memorize the condition which the card is in during the various phases.

During registration of the receipt, in the fidelity record creation phase (FidelityMovimenti table), if "StatoScadenza" has a value of "1", a new expiration date will be set, calculated by adding the expiration months set in the fidelity master data to the date of the receipt. This means that if a customer, once the validity is extended, makes a purchase, his/her card will be renewed for another 12 months. In this case a new record will be created only if the validity start date of the record with "1" status is different from that of the receipt in progress, otherwise the record will be updated. The status will be put to "0". In this manner the customer will restart from zero and have another 12 months to reach the preset threshold and thus obtain unlimited validity for his/her card. If the receipt registration is not completed due to some problem and the operator is returned to the payment window, Stores2 will eliminate the FidelityMovimenti records and update the FidelityCondizioni situation. I would like to underline that if the card is expired even after the additional 2 month extension, the fidelity barcode will not be accepted thus we will never be in the fidelity movement registration phase. So in this type of situation no operation will be performed on the FidelityCondizioni table.

If the card, despite the additional 2 months, is expired it will not be accepted. If, at master data level, the "ScadenzaConsideraIntestatarario" flag is enabled, Stores2 will not accept the card but will let the owner be associated with the sale. The receipt will not be fidelity and thus the customer cannot use the discount or accumulate the amount purchased (the CodiceFidelity field of MovimentiTestate will not have a value assigned and thus fidelity movements will not be registered); the sale will however be registered to the customer. If the flag is not enabled (default option) the customer will not be accepted either.

If the card is expired and the fidelity includes manual renewal, Stores2 will display a message which asks the operator if he/she would like to renew. If the answer is yes the manual renewal procedure described in the paragraph below will be performed. Clearly, the procedure will be performed directly on the receipt management screen without having to access the condition master data.

The fidelity master data was probably created with HKD currency and movements are not included with different currencies (or should not be included in the store circuit with different currency). Even if this is not your case, you should note that calculation of the purchased amount considers all of the records present in the database regardless of the currency. Specifically the amounts for each currency will be grouped, converted to the store's currency and added to calculate the total purchased amount. The exchange rate will be the real one at the time of the purchase and will be retrieved from the exchange rate master data which must be correctly updated. In the case of receipts made in stores with only HKD currency the exchange rate will be 1 thus no conversion problems are expected.

2.2.3 Card master data and manual renewal procedure

The fidelity conditions are managed in a specific master data section which includes a list of conditions present with the possibility of recalling the form to be able to manage the associated information. In this situation it is also possible to add new conditions.

The new expiration management which we will introduce will result in an increase in conditions for each card, however only the last element will be the valid one. To prevent displaying insignificant elements which could also confuse the user, we have added a new check box ("Display the most recent element for every card") used to show one element on the list for each card when enabled.

In this condition it will not be possible to perform deletion, resetting and retransmission operations. If the check is not enabled it will be possible to display all the conditions and enter the form properties. Expired cards cannot be edited for this management.

Head office or store operators will have to have the possibility of intervening on permanently expired cards and renew them for 12 months. We propose adding a specific key to start the card renewal procedure, which will renew the card for 12 months (number of months set in the fidelity master data) starting from the system date.

In terms of operation it is possible that when the form is selected, the FidelityCondizioni table only contains the record of 12 months validity and not the extension of 2 months even if the annual validity has expired. This is because the customer may not have made other purchases and thus the FidelityCondizioni table is not updated. In this case, when the form is opened, Stores2 will update the table by creating the specific record related to the extension period (the StatoScadenza field will be assigned a value of 1). If this extension period has expired the card can no longer be used. The key for manual card renewal will be enabled in this condition. The generated record will be identifiable from the new "RinnovoManuale" field.