

**Oracle® Retail MICROS Stores2**

Functional Document

Customers - Online Centralized Customer Management

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## **TECHNICAL DOCUMENTATION**

*Stores2 - 1.34.1 - Customers - Online centralized customer management*

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## Table of contents

<b>1 Introduction .....</b>	<b>3</b>
<b>2 Online centralized customer management.....</b>	<b>3</b>
<b>2.1 Configuration.....</b>	<b>3</b>
2.1.1 <i>Online functions.....</i>	3
2.1.2 <i>Geographic nodes .....</i>	4
<b>2.2 Operation.....</b>	<b>5</b>
2.2.1 <i>Customer master data creation and maintenance .....</i>	5
2.2.2 <i>Entering a new customer.....</i>	6
2.2.3 <i>Editing the customer form .....</i>	7
2.2.4 <i>Customer registered offline .....</i>	8
2.2.5 <i>Postponed customer .....</i>	8

**Note: The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.**

## 1 Introduction

This function improves the customer master data entry and management system which relies on a master data centralization logic in order to guarantee better performance in terms of real time updating of information.

## 2 Online centralized customer management

The current Stores2 procedure entails that each store locally keep the master data forms of their customers and those of other stores' customer who make purchases in their store. With the current version the information from the web service is saved in a support table (of the DBLocal database) to then be entered in the main database where it is retrieved to be used by the various functionalities (for example sales transactions like the heading of a receipt, invoice printing, tax free printing, but also the selection of the customer in orders or movements and statistics).

Initially we recommend manually cleaning the data in order to keep only your node's customers in the databases of the stores. The various stores will then load their database with the master data forms of customers who go to them to make purchases, in addition to new registrations.

The online query for retrieving customer information will only be performed for receipt management, in particular in the customer search and fidelity barcode reading functions. All of the other functionalities that use customer master data will continue to query locally present data directly.

The information of the "IndirizziSpedizione" table will also be managed in online mode.

Online management of the "ClientiCarteDiCredito" table information is not included.

### 2.1 Configuration

#### 2.1.1 Online functions

The online function ("5-Fidelity") needs to be configured in General parameters or Geographic nodes indicating the Web Service path which accesses the head office Stores2 db.

The screenshot shows the 'Parametri generali' window with the following data:

Chiave	Tentativi	Time Out	Tentativi conn.	Time out conn.	Funzione logica
	1	65	1	10	0 - Gift Cards
	1	65	15	60	1 - Resi a sede
	1	65	1	10	2 - Giacenze
	1	65	0	0	3 - Resi da cliente
	0	0	0	0	4 - Voucher
	1	65	1	10	5 - Fidelity
	1	65	1	20	6 - Instant win
	0	0	0	0	7 - Verifica indirizzi
	0	65	0	0	8 - Promozioni

Codice	Descrizione	Indirizzo	Ordin	Funzione logica	An
5	Send sale	http://localhost/Stores2WebService	1	11 Send-sale	<input checked="" type="checkbox"/>
6	Clienti/Fidelity	http://localhost/Stores2WebService	1	5 Fidelity	<input type="checkbox"/>
7	ResiOnLine	http://localhost/Stores2WebService	1	3 Resi da cliente	<input type="checkbox"/>
8	SendSaleGiacenze	http://vm-wws2008r2QA/Stores2W	2	17 Send sale giacenze	<input type="checkbox"/>

## 2.1.2 Geographic nodes

Centralized customer management will be configured by activating a flag that already exists a geographic node level.

Option	Checked
Gestione fidelity	<input checked="" type="checkbox"/>
Stampa punteggio fidelity	<input checked="" type="checkbox"/>
Forza punti solo per nuovo cliente	<input type="checkbox"/>
Non mostrare clienti fidelity	<input type="checkbox"/>
Stampa totale anno	<input type="checkbox"/>
Gestisci solo acquisti locali	<input type="checkbox"/>
Impedisci utilizzo clienti di altri nodi	<input type="checkbox"/>
Clienti centralizzati	<input checked="" type="checkbox"/>
Apertura automatica scheda cliente se il web service non conosce il cliente	<input checked="" type="checkbox"/>
Consenti la registrazione/modifica dei clienti anche in assenza di collegamento	<input checked="" type="checkbox"/>
Utilizza punti come sconto nella gestione Loyalty	<input type="checkbox"/>

Azzeramento accumulo: gg 01 mm 01

Richiesta fidelizzazione: [dropdown] [?] [+]

Two new functions have been introduced linked to centralized customers which can be activated from this screen:

**Automatic customer form opening if the web service does not know the customer**, if no customer is found for the entered criteria during the search phase, the program will open a new customer form with the entered forms filled in (the managed fields are Nome, Cognome, Email, Partita IVA and Località).

**Allow registration/editing of customers even without connection**, during the search phase if it is not possible to reach the web service, the program will still let the user create a new customer, which will be sent to the web service later.

## 2.2 Operation

### 2.2.1 Customer master data creation and maintenance

The available functionalities are the customer search and form which can be called from the sales screen. When entering receipt management the program will automatically display the window for customer search. The same window can be called using the specific tool.

Nodo	Codice	Descrizione	Data nascita	Indirizzo	Località
------	--------	-------------	--------------	-----------	----------

The following filters are included:

- Name,
- Last name,
- Email,
- VAT number,
- City,
- Fidelity/Not fidelity,
- Temporary/Not temporary.

All of the information is already included, list 31 just needs to be configured to display only this information. This window also manages the customer form type so it is possible to differentiate the display of objects by node.

The current search window has the following keys:

- Search

- New
- Properties
- Select
- Cancel
- Fidelity -> visible for fidelity management, used to display the list of fidelity customers. It may no longer make sense for centralized management, so we might think about intervening to hide it.
- Change status -> used in a specific loyalty management and not included for centralized customer management. It is used to delete/restore a customer master data form through the web service.
- Postpone -> enables temporary customer management.

When the "Search" key is pressed, Stores2 will check that at least one filter parameter among name, last name and email, has been indicated and will then call the web service which will respond with the list of customers found on the database by the head office based on the set filters. It is possible to set a maximum number of elements at general parameter level that the web service needs to return. If the filter is very generic (for example all the customers whose name starts with "A" is requested) the web service will find many, many results with consequent decrease in performance. By setting a limit number, the web service will return the maximum number of configured elements and will warn the operator to optimize the search to get a more significant result ("Your request has returned a result of 1% of the customers on the server. Only 2% are displayed on the list. Try refining the filters to optimize the result").

The web service returns a recordset with all the fields of the "Clienti" table plus the fidelity barcode information. The data is saved in a local database support table and loaded in the list.

The list displays the following information:

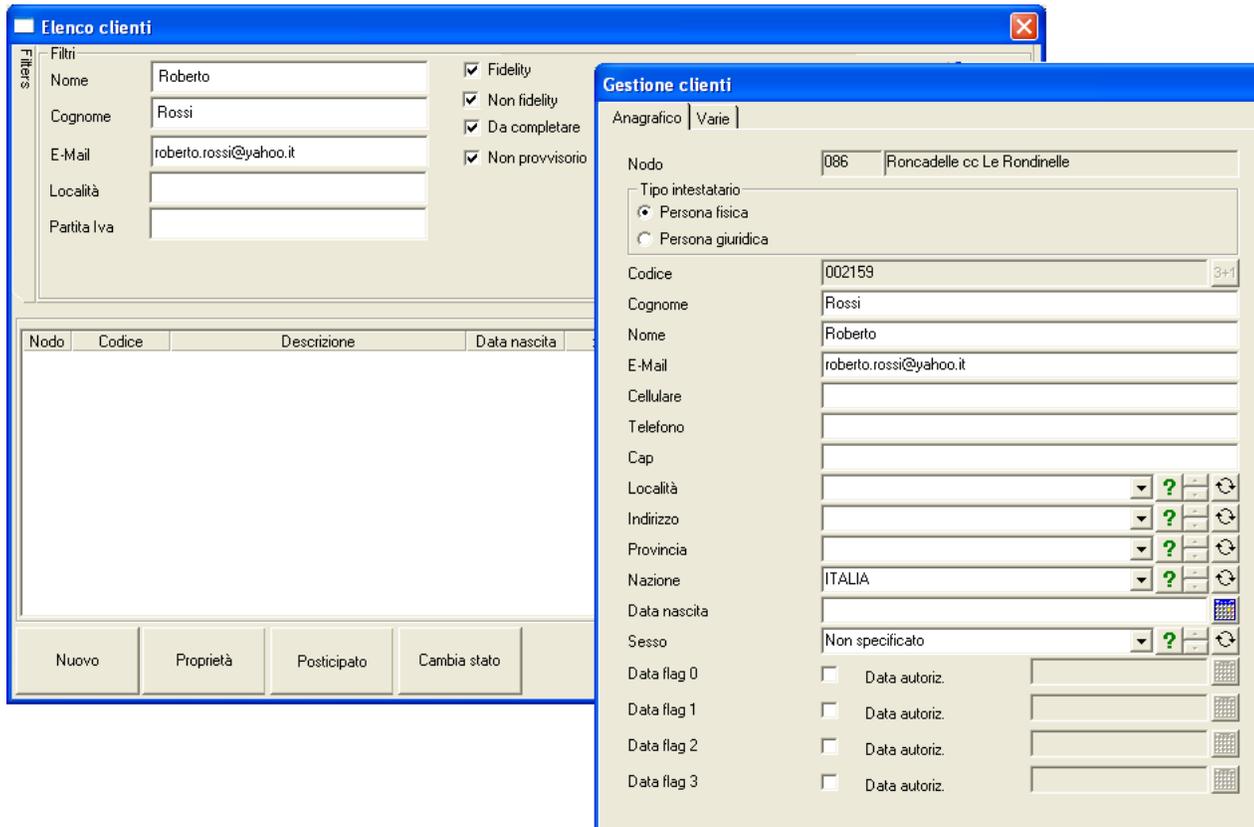
- Customer node,
- Customer code,
- Description (name + last name),
- Date of birth,
- Address,
- City,
- Deleted (to activate through the lists).

Stores2 will also manage a second recordset to load shipping address information which will be returned by the web service.

### **2.2.2 Entering a new customer**

If, following a request to the web service, no results are returned, the program will automatically open a form for entry of the new customer. Basically, the operator enters some customer data as filters, and asks the web service for the information present at the head office for that customer. If no results are returned, it means that the

customer is unknown and Stores2 prepares to register his or her data. The values entered as filter are used to preset the relative form fields.



For example, if a search was performed entering "Robert Smith" as name and last name, the same data will be used to assign values to the corresponding fields when entering a new master data form. Currently the information preset based on the values indicated in the search are the name and last name. The program will need to be modified to be able to use the email, VAT number and city information.

When the form is confirmed the program will check that the mandatory information has been entered and will call the web service for real time registration on the head office database. The customer will also be registered locally. The mandatory information parameters can be set from list management and possibly by executing scripts which can be entered in the confirmation phase ("ScriptOnConfirm").

Both online and local registration must include the shipping addresses.

The online registration function has been changed so that the single fields are not passed to the web service but the complete record of both the "Clienti" table and "IndirizziSpedizione" table (plus the fidelity barcode).

Entry of a new customer can also be done by pressing the "new" key in the search window. The operations will take place in the same manner as described above.

### 2.2.3 Editing the customer form

Centralized management makes the updated forms of customers available and makes it possible to edit them in real time on any store. When confirming the form, if changes have been made Stores2 will contact the web

service to update the data. The Web service will run a control on the uniqueness of the email address only if it has been changed.

If offline, Stores2 will save the changes locally, and set a value for the new "TrasmissioneWS" field so that transmission is attempted again during closing of the next receipt. The control on the uniqueness of the email address will not be run in this operation.

#### **2.2.4 Customer registered offline**

Given that the local data are saved, connection with the web service is not necessary for retrieving key fields of the "Clienti" table and for generating a fidelity barcode. The centralized customer registration procedure makes it possible to save customers in offline mode as well (if the "Allow registration/editing of customer even without connection" parameter is enabled in geographic nodes).

Generation of the Node/Code key (and consequently the barcode) must always be done with the program in local. Two fundamental problems can occur when there is no connection. The first is the impossibility of verifying the existence of the customer and the second is to ensure that the same customer does not register again in another store before the information reaches the head office.

Let's look at an example. The operator opens the search window, enters a few parameters and calls the web service which returns an error due to connection problems. At this point Stores2 runs a local search and if it finds elements it displays them in the list and makes them available to the operator who can decide to select an element or enter the form. If, instead, the operation does not return results, in line with what was described when analyzing the main procedure, Stores2 will open the form to start a new registration which will be different than the one described above only because in an offline condition the email address must be entered. When the form is confirmed, Stores2 will try to contact the web service again. If the connection has been restored, the information will be sent to the head office, otherwise it will remain local where values are assigned so that during registration of the next receipt, the program will try to send the data of customers which has not been previously transmitted. In this manner the updating takes place as soon as possible and the data reaches the head office with the normal transmission procedures.

The "TrasmissioneWS" field has been added to the "Clienti" and "IndirizziSpedizioni" tables to force data transmission to the web service (for the time being we will use this functionality in receipt registration).

#### **2.2.5 Postponed customer**

The current procedure involves the possibility of displaying the "Postponed" button in the search window for temporary entry of the customer. The procedure creates a record in the "Clienti" table with the key already defined, assigning a value only to the name and last name information which are taken from the corresponding text boxes present in the search window. The barcode will be generated in this phase.

With centralized customer management the "Postponed" button will not be enabled when the search window is entered. Thus the operator is forced to perform a search. Regardless of the connection status, if there are results and the email address has not been indicated as filter, the button will be reactivated. By doing this, Stores2 will allow entry of a new form since the customer may not correspond to the returned elements; however, if you indicated the email (which despite some conditions that we'll look at later, we assume as "unique") it means that the customer must correspond to the returned element and thus Stores2 cannot allow the "fast" and "temporary" creation of a new form with the same data as already registered master data.

If, instead, the search, regardless of the connection status, does not return elements, the program will automatically open the form for entering the new customer where in addition to the "Confirm" and "Cancel" keys

will be a key for creating a temporary customer. When the "Postponed" key is pressed the program will do what the function currently does which can be called from the search window and will close the customer form.