

Oracle® Retail MICROS Stores2
Functional Document
Fidelity - Third Party Voucher Management
Release 1.34.3

September 2015

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TECHNICAL DOCUMENTATION

Stores2 - 1.34.3 - Fidelity - Third party voucher management

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Version 1.00 of 20/02/2014

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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

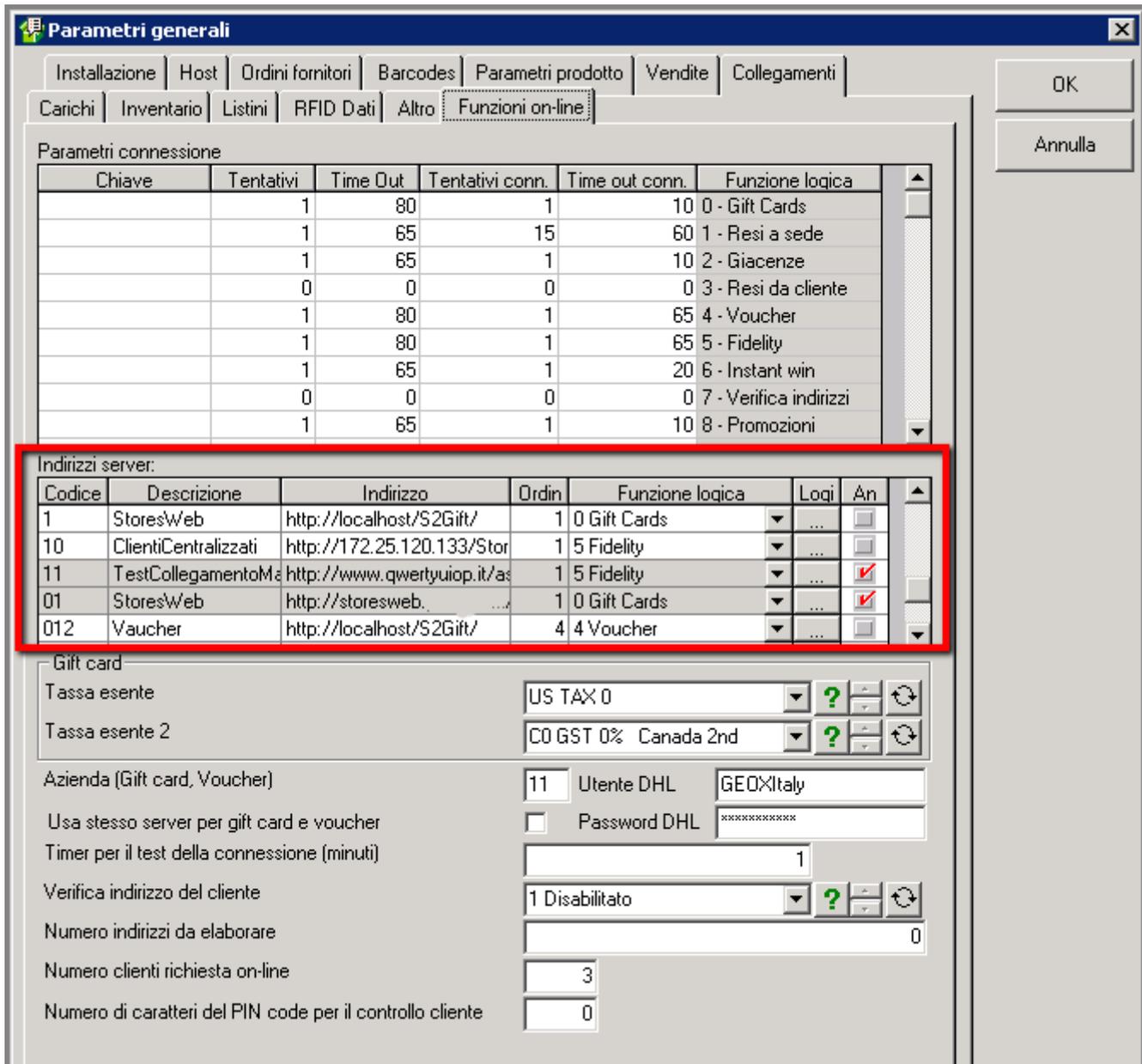
This function is used to manage vouchers generated by third parties and to automatically select them once the associated customer is selected

2 Third party voucher management

2.1 Configuration

2.1.1 General parameters

It will be necessary to configure a new online functionality in Stores2 ("4 - Voucher") used to make calls to the Stores2Gift database to request information on the voucher and register its use. The system is similar and parallel to the one already used for gift cards. You need to indicate one or more server addresses in **general parameters** or geographic nodes and assign them to the online Voucher functionality.



2.1.2 Geographic nodes

With the "Run automatic connection for voucher selection" parameter when the customer is selected, Stores2 automatically contacts the gift server to request the voucher list.



2.1.3 Voucher configuration in Stores2

The vouchers which are created and delivered to customers correspond to departments which can be identified with the new "Online Voucher" flag.

The screenshot displays the 'Reparti' configuration window. The 'Codice' field contains 'G109', 'Descrizione' is 'Gift Loyalty', and 'Barcode' is '109*'. The 'Voucher on-line' checkbox is checked. A 'Configurazione' button is highlighted. A secondary dialog box titled 'Voucher on-line' is open, showing 'Numero massimo di voucher per scontrino' set to 0, and 'Esegui il controllo di coerenza con il barcode fidelity' checked.

The voucher value and the corresponding minimum amount will be defined on Stores2Gift. In Stores2 it will only be necessary to create a department and assign a barcode prefix to it. It will be possible to create just one department or separate the vouchers and group them based on amount.

If the Online voucher flag is enabled in the department form, it will be possible to indicate other parameters as well to set the parameters of the number of vouchers that can be spent per receipt and the line type to consider in calculating the minimum amount. The program currently adds the values of the minimum amounts corresponding to the used vouchers during passage from the payments window (both before and after calculation of the promotions) and compares them with a receipt amount currently calculated based on specific rules part of which are parameterizable. The amount is calculated by adding the values of all the lines for product type, non-existent barcodes and departments which manage the quantities. It is possible to exclude returns and discounted

lines depending on how the department is set. It is important to note that it is not possible to have various departments with different calculation rules.

2.1.4 Voucher configuration in Stores2Gift

It will be necessary to create a new type of card through the creation of a "Gift Master" type: to define the prefix code and start/end character of the sequential "formato libero" will have to be used. By selecting the "formato libero" type the backoffice program will block any voucher creation and release activity assigning these tasks to the central system data acquisition program.

This data entry will be positioned in the product so that the logic for using or not using the voucher is concentrated.



Gift Master - Nuovo	
Impostazioni generali Impostazioni default GiftMaster Impostazioni esportazione	
Codice	FID
Descrizione	Fidelity
Tipo codifica	0 Formato libero
Prefisso	XXX
BIN	0
Lunghezza chiave	0
Lunghezza	13
<input checked="" type="checkbox"/> Configura progressivo	
Carattere di partenza	6
Lunghezza progressiva	7
Ultimo progressivo utilizzato	
<input checked="" type="checkbox"/> Codice fidelity obbligatorio	

A new "Mandatory fidelity code" flag has been added to the gift master setting which must be indicated if, as in the case in question, it is necessary to register and check the association of a voucher with the fidelity card.

2.2 Voucher importing

It will be possible to import vouchers generated by third parties using the S2GImportExport application.

2.3 Operation

The client intends to award customers by issuing a series of vouchers of a variable number and amount based on the amount purchased. The central system will generate the vouchers.

Using an online system it will be possible to manage these vouchers in a manner similar to that adopted for gift card management (the server is the same).

The system is able to manage the use of more than one voucher in the same sale, thanks to a transaction management used to certify the block execution of the operations on all vouchers.

The GiftMovimentiTransazioni table is used to keep track of the transactions:

- ID: autonumber field (key)
- DataInizio (datetime): transaction start date/time
- DataFine (datetime): transaction end date/time

- Azienda (nvarchar 10)
- Nodo (nvarchar 10)
- Postazione (nvarchar 10)

The GiftMovimenti table contains the "ID" field to identify the operations performed within in a certain transaction.

If the field has a value of zero, the movement is not transacted.

The transaction is opened when the receipt is closed. Next all of the voucher use operations are performed. If there have been errors, the transaction can be completed, otherwise it is possible to cancel all of the "transacted" operations.

A problem may occur at the store where a transaction does not close/cancel. For example, if the workstation that is performing the transaction has problems (e.g. line problems/PC blocks). If the outcome is unsuccessful, the transaction will remain open for the number of configured minutes after this it will be automatically removed at the next Stores2 client connection.

To define a time validity interval for a transaction there is a general parameter "Transaction duration" used to set the number of minutes during which the workstation performing the transaction can continue to exclusively use the vouchers it is using. The validity end Date/time will be updated for each operation with the same transaction ID.

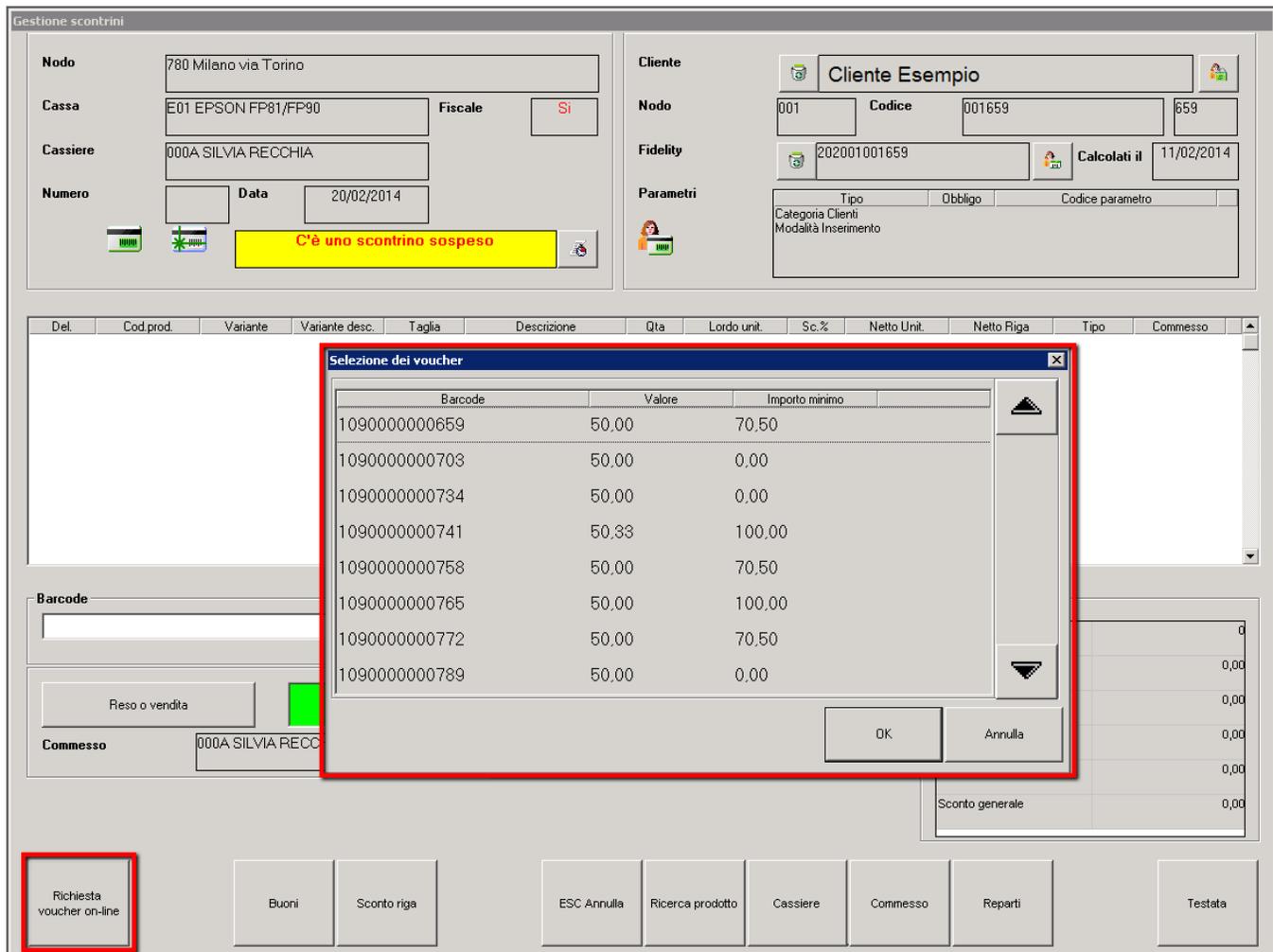
If the transacted value is read from another workstation, the Stores2 client will warn the user that the voucher is already in use and cannot be used.

2.3.1.1 Using vouchers in the receipt

The vouchers that the central system makes available will be used for receipt management after the sale is registered to the customer.

There are 3 voucher selection modes:

- for the first if the operator is authorized for voucher selection, once the sale is registered to the customer, Stores2 displays a key for requesting the voucher list;
- for the second if the operator is authorized for voucher selection and the "EseguCollegamentoVoucherAutomatico" parameter has been enabled at geographic node level, when the customer is selected, Stores2 will automatically contact the gift server to request the voucher list;
- for the third, since the voucher is in the customer's possession, it is read directly by the operator with consequent call of the gift server to request the information connected to the specific voucher. This will only be possible after having identified the customer.



Regardless of the procedure used, Stores2 will call the gift card web service to receive information on the selected voucher:

- If there are problems with the connection or in the request procedure, the operation will be cancelled.
 1. Status "0" -> OK - the operations can continue.
 2. Status "10" -> The voucher is disabled.
 3. Status "90" -> The voucher is blocked.
- If the connection is successful, the server will return information to Stores2, the significant information for the procedure includes:
 1. The status of the barcode which must be sold. The card will be accepted if the balance is different from zero. If not, it means the voucher has already been spent.
 2. Validity period. It will be possible to indicate a use start and end date. It will also be possible to force the procedure to not consider the validity dates by using the specific "ConsentiForzaturaUso" flag which can be set on the individual card allowing its use even if the period has expired.

3. Currency: if it does not correspond to the node's currency the voucher will not be accepted.
4. Importo: defined for each voucher on the web application, it represents the voucher amount.
5. Minimum amount: defined for each voucher on the web application, it represents the minimum value which the receipt must have for the voucher to be spent. This subject was discussed before.

The control of the customer with the voucher barcode is only performed on the web part, if specifically configured at gift master level. One of the parameters in the request Stores2 make to the web server is the fidelity barcode which is mandatory if the "VoucherBarcodeFidelityObbligatorio" flag is enabled at department master data level.

Each voucher can be used only once and must be completely spent. It is possible to indicate a minimum purchase amount for each amount. To be able to use vouchers connected to different departments in the same sale the minimum amount calculation rules need to be the same. If the voucher is usable a department type return line will be registered. The operator can enter line editing but will not be able to enter anything except to change the clerk. It will not be possible to cancel or change the customer (if the "VoucherBarcodeFidelityObbligatorio" parameter is enabled on the department form).

The operator may read more than one voucher in the same sale based on the configuration of the "VoucherNumeroMax" parameter on the department. If the value is set to 0, the number of vouchers will not be limited.

The program will run a control on the minimum amount when passing to the payment window. Stores2 will add all the minimum amounts required for all the vouchers that have been read and compare them with the receipt amount. If the sum is higher, the program will not allow the operator to continue. The total receipt amount will be obtained by adding all of the lines for Product type, Non-existent barcode and Department with qty. management enabled. Returns and discounted products will be considered based on the department master data configuration. If promotions are managed, the control will be run twice (both before and after calculation of the discounts connected to the promotions). The same control is not run in the next phase, so the control is run considering the line amounts net of line discounts but not heading discounts.

During receipt closing Stores2 will communicate the list of used vouchers to the web server. The procedure requires a transaction to be opened, within this Stores2 will make as many calls as the number of vouchers used. Once the calls are finished the transaction is closed: if there are any problems during registrations of the vouchers before the transaction is closed, the web server may cancel the transaction and inform Stores2 that the operation was not performed correctly. The data updating operation is basically only performed when Stores2 closes the transaction and the web server responds positively. In other cases (if the web server indicates a failure or does not respond at all), the transaction will not be closed and the data on the server will not be updated. If a negative response reaches Stores2, the program will ask the operator if he or she wants to retry the operation. If a decision is made to cancel the operations, Stores2 will have to eliminate the movements already registered and connected to the sale, cancel any registrations performed with the gift card and return the operator to the payment window. It is important to note that at this point the receipt has not been issued, while the payments with the pos have already been made. Regarding this last point, the payments made with the pos cannot be deleted and by closing the receipt they will no longer be made.

The printing procedure requires that the lines be ordered to separate the products from vouchers. This way the return lines corresponding to vouchers will be printed after the other lines.

Stores2 makes it possible to treat voucher lines as non-fiscal lines and thus not to print them in the receipt details but to print them as payment procedure. The voucher department needs to be configured as non-fiscal and a payment procedure needs to be indicated at general parameter level as payment type for non-fiscal departments.

The additional information that you treated earlier is printed on the receipt in the courtesy phrase or if not printed is shown on the screen as a message. Currently additional information on the ProdottiBarcodes table is managed in the event of points fidelity and printed only if a specific parameter ("StampaInformazioniAggiuntive") at general parameter level is enabled.

On Epson fiscal and on-fiscal interfaces a summary of vouchers registered to the customer will be printed at the bottom of the receipt.

```
Elenco voucher:  
10900000000659 - 50,00 EUR  
10900000000734 - 50,00 EUR  
10900000000741 - 50,33 EUR  
10900000000758 - 50,00 EUR  
10900000000765 - 50,00 EUR  
10900000000772 - 50,00 EUR  
10900000000789 - 50,00 EUR  
10900000000796 - 50,00 EUR  
10900000000802 - 50,00 EUR
```