

Oracle® Retail MICROS Stores2

Functional Document
Sales - Point Fidelity
Release 1.35.1

September 2015

Oracle® Retail MICROS Stores2 Functional Document Sales - Point Fidelity, Release 1.35 .1

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TECHNICAL DOCUMENTATION

Stores2 - 1.35.0 - Sales - Point fidelity with prize management

Report developed by:

MICROS-Retail srl with sole shareholder

Alessio Ossola

Version 1.02 of 21/03/2014

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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.

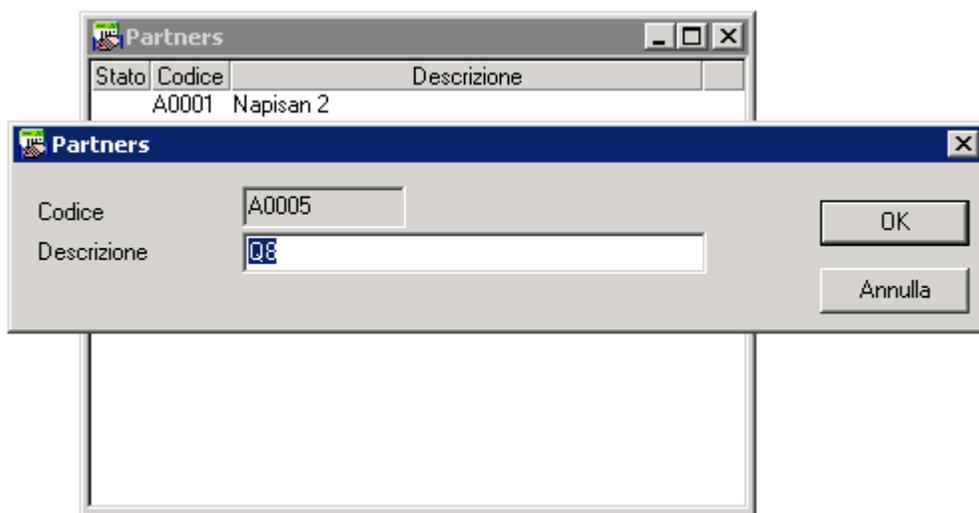
1 Introduction

This function is used to create a point fidelity with prize management. The points can be accumulated at all stores and online management is preferred to have updated points in real time (however, it will be possible to manage everything offline). The prizes can be requested only when the necessary points have been reached and economic management of prize assignment is not required. The possibility of requesting prizes with a points + money combination is not included. The prize can be requested at every participating store and will be sent directly from the head office to the customer. Management of delivery of the goods has not been requested. Stores2 will be able to print the receipt which must be used by the customer to activate the prize. In the event of errors or second thoughts it will be possible to cancel the prize request. It will also be possible to configure gift cards among the prizes.

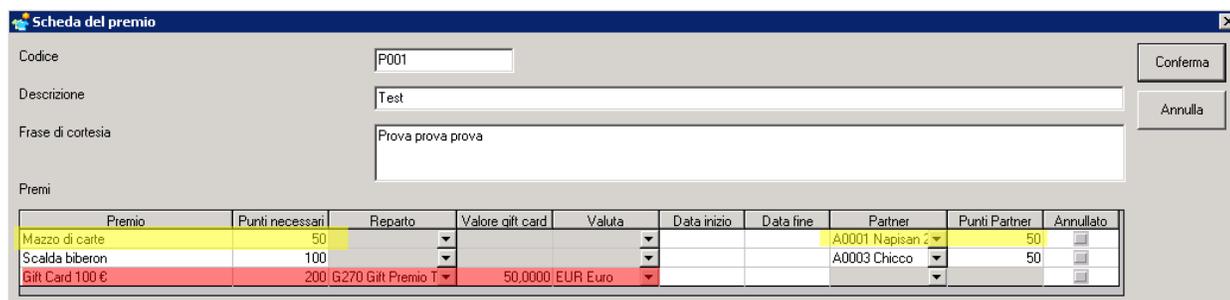
2 Point fidelity with prize management

2.1 Configuration

A new "Fidelity Partner" section has been added to the customer Master Data section which can be used to enter a list of external partners who will participate in the point accumulation phase.



After having created a fidelity master data with point management, by using the new "Prize list" master data section, it will be possible to enter a series of prizes associated with a number of points.



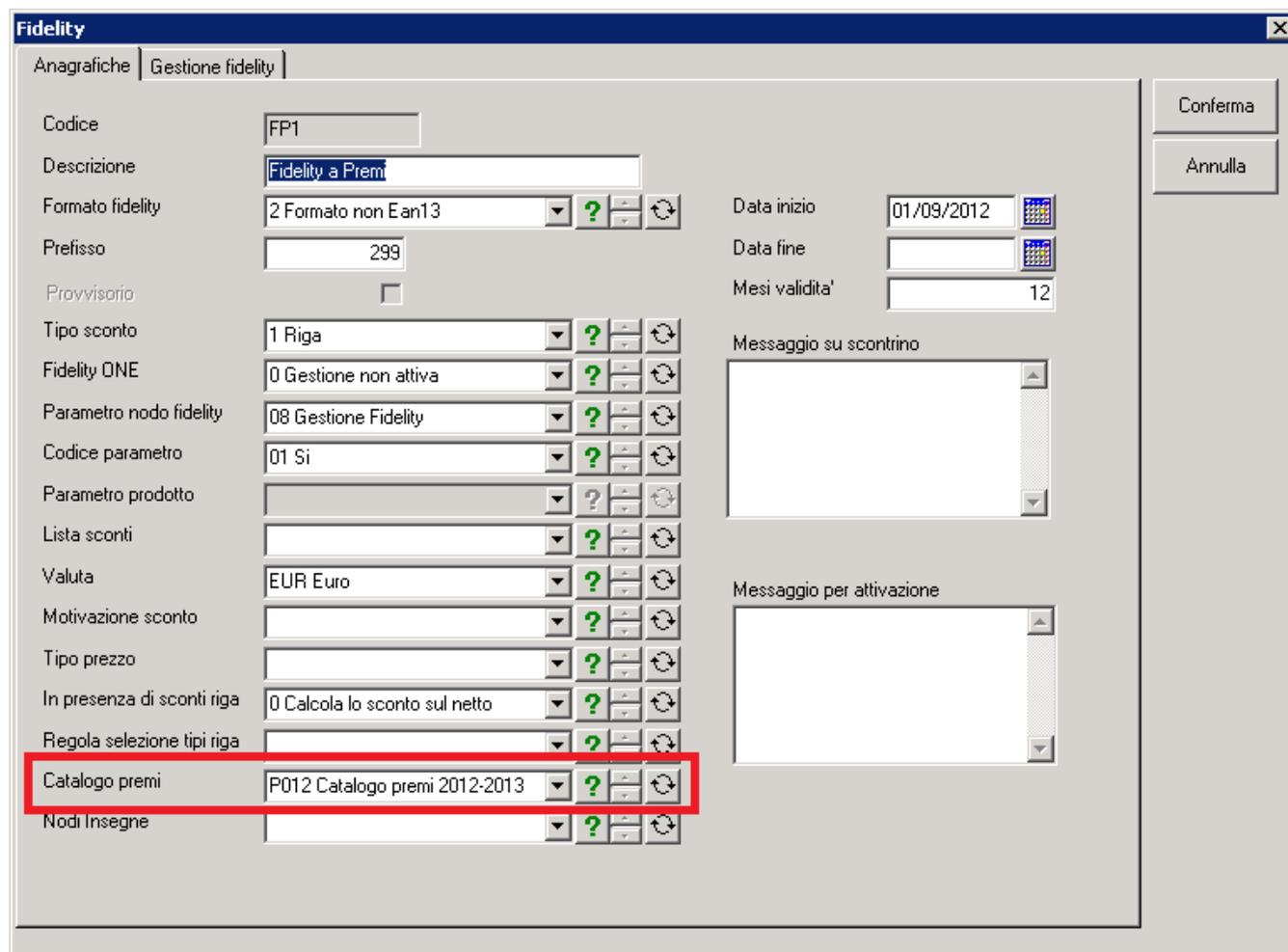
The new functionality will be composed of a list where all the created catalogs can be displayed and a form for entering or displaying the prize list which will make up the catalog.

The list will be composed of a code, a description and a text box for specifying the courtesy phrase to print on the non-fiscal receipt which will be issued when the prize is redeemed. Foreign language management is included for the phrase.

The form will contain a grid for indicating the information related to the prizes (invisible sequential code, description, number of points necessary for obtaining the prize, possible associated partner, any points connected to the partner and status flag for cancelling any selected prizes).

The presence of the "Reparto" field prevents the use of partners and enables management of gift cards as prizes. It will be necessary to enter the value of the gift card to be used as a prize.

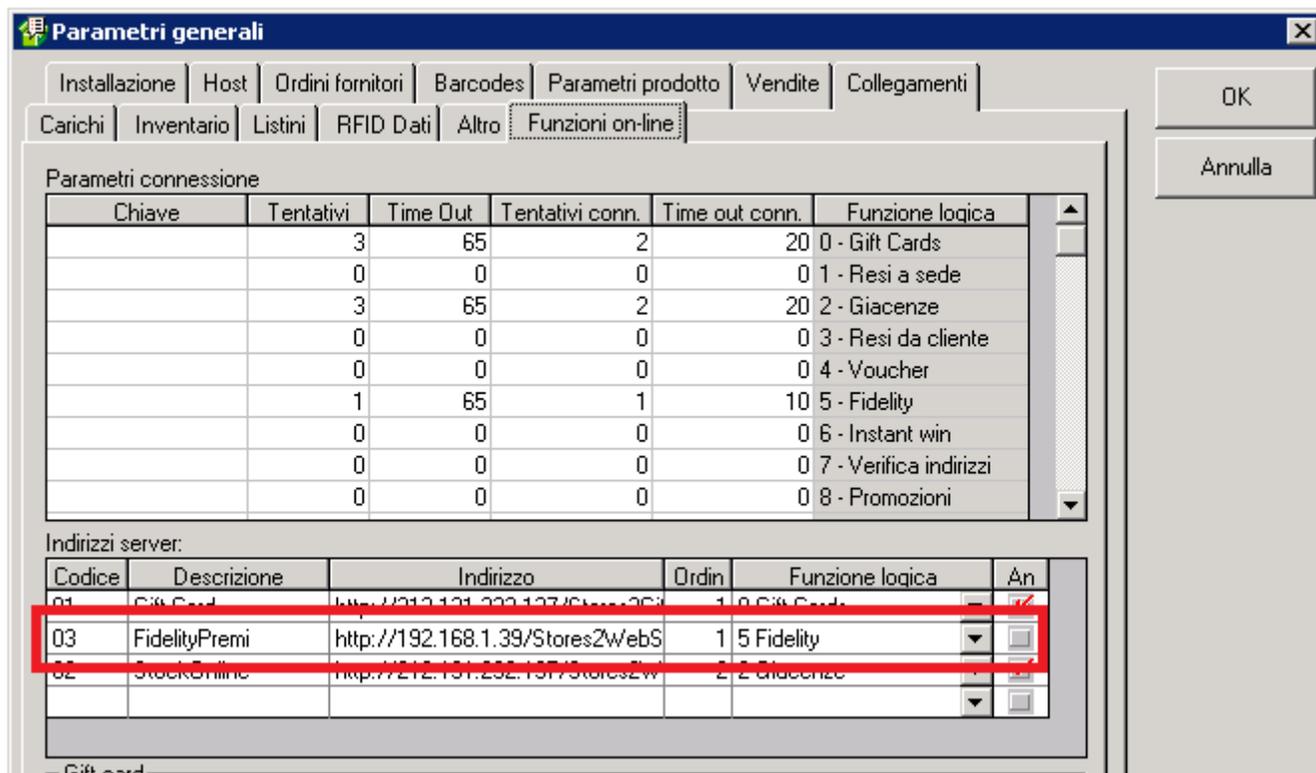
In terms of fidelity master data in the main tab there will be a "Prize catalog" combo box where the catalog you intend to associate to your fidelity can be selected.



The fidelity you'll create must be combined to a point master data and have the "Online management" flag enabled.

The integration we are proposing can operate both in standard mode and online mode by disabling/enabling the specific flag in the fidelity master data. The advantage of the online proposal is being able to update the situation in real time.

To enable online management it will also be necessary to configure the specific online function for the fidelity at general parameter or geographic node level.



2.2 Operation

2.2.1 Receipt management

Point accumulation will be similar to the present with the difference that if online management is configured (flag in fidelity master data and operation at general parameters or geographic nodes level), the point balance will be retrieved directly from the head office concentrator. The operator must register the sale to the customer by reading the fidelity barcode or selecting the customer from a specific search. Stores2 will perform the calculation of the points reached by the customer. In standard mode the point balance will be retrieved directly from the local store database. For online management, Stores2 will contact the web service installed at the head office and request the point balance.

Cliente	 Ossola MArco 								
Nodo	F95	Codice	1110011 2114						
Fidelity	 2991111110011		Scadenza 11/09/2013						
Parametri	<table border="1"> <thead> <tr> <th>Tipo</th> <th>Obbligo</th> <th>Codice parametro</th> </tr> </thead> <tbody> <tr> <td>Professione</td> <td></td> <td></td> </tr> </tbody> </table>			Tipo	Obbligo	Codice parametro	Professione		
Tipo	Obbligo	Codice parametro							
Professione									

The point information will be shown on the receipt heading and the date by when the points need to be used. In terms of the expiration of points and specifically the validity period, there are three procedures: the first considers the validity period indicated on the point form associated to the fidelity master data; the second entails resetting of the points at specific time intervals, expressed as a number of months to indicate directly in the fidelity master data. In this case the starting date will be the date of the customer's first receipt; the third entails the possibility of specifying a number of days within which the balance calculation needs to be made (for example, if 30 is configured as the number of days, the program would calculate the balance always considering the movements of the past 30 days).

When closing the receipt Stores2 will calculate the points locally and send the information to the web service. During the registration phase, Stores2 writes the data for fidelity sales, specifically grouped, in the FidelityMovimenti table. The points are registered in a record for each receipt (as long as point management by product parameter is not enabled). Stores2 will send the web service all the records that are created in FidelityMovimenti, associated to the receipt in progress. It is also possible to think of sending the web service only the records with the "Punti" field with value assigned so that the other records reach the head office with the normal data transmission procedures, but we are not proposing this option since we want to update the balance and movements situation in real time. The FidelityMovimenti table will continue to be input also locally. The recommended sorting is "by branch", which is the currently used option. With this sorting the data only go to the head office and store which owns the card. If there are problems with the connection, or it is impossible to send the data, Stores2 will permit continuing the sales transactions. Again in this case the FidelityMovimenti records will reach the head office with the normal data transmission channel. In an offline condition, the sales transactions will not be interrupted and the point balance, even if not in real time, will be updated.

I'd like to underline that in a similar situation, if the customer returns to buy something before the head office has actually been updated, the head office balance would not represent the real situation. For this reason the web service needs to return the point balance and creation date/time of the last movement to the store which are present at the head office and performed on the store by the customer. Thus Stores2 will receive the point balance from the head office and add it to any points present only locally. Clearly, the balance from any purchases or uses at other stores and not present at the head office will not be included. In an offline condition the point balance will always have a value set to zero regardless of local fidelity movements.

2.2.1.1 Fidelity data display

Stores2 makes it possible to display fidelity movements in a specific section which can be called from the customer form and receipt management. This section is composed of three parts. The first shows the main master

data information, the second the information regarding the type of fidelity the customer has (validity, discount type, point situation, etc.) and the third movements groups based on various criteria. We must guarantee that by selecting the online mode data querying will take place directly on the head office database, keeping the display mode unchanged. Again in this case we can show both the movements present on the server and those present only on the store.

The request for data will not occur by entering the summary form, a "Search" key will need to be pressed. This is because the operator may enter the form not to display the movements but only the master data information that is already available to the program. When the Stores2 key is pressed it will call the web service and retrieve all the movements registered to the customer and the information on the point balance. If the data is already present locally, because already retrieved with a previous call, the data will be directly displayed without having to contact the web service again. In an offline condition only locally present movements will be displayed but a value will not be assigned for the total point balance because we will not have real information available.

You should note that the changes to the fidelity data summary sheet will be made to all of the functions where it is currently called: receipt management, customer master data and fidelity card list.

2.2.1.2 Prize request

The consumer can decide to request the prize at any fidelity participating store. The function to use to register the customer's prize request will be added to receipt management. However, it is our intention to separate it from the sales registration procedure so that it is possible to request the prize without obligating the customer to make a purchase. For receipt management we will add a new tool which will be visible only if a customer is selected who is connected to a point fidelity which includes prize management.

The operator must read the fidelity barcode or select the customer from a specific search, just like for registering a sale. The tool (or corresponding button) needs to be selected for activating the prize request procedure). Stores2 will display a window displaying the points reached by the customer, the list of prizes already requested

and the list of currently valid prizes, present in the catalog associated to the fidelity. The first list will show the information for the requests already performed: The code of the store where the operation is performed, the cashier who registered the request, the date of the request, description of the prize, points used and request status. We will include the possibility of cancelling/resetting the request and reprinting the receipt (non-fiscal receipt). Only prizes for the current validity period will be displayed. The second list will display all the currently valid prizes present in the catalogue, highlighting those that can be requested, i.e. those for which the required points have been reached. The managed information will include: description of the prize, the corresponding points and the points still to accumulate to be able to request it. We will include a key to cancel the window and a key to confirm the selection. In offline conditions only the cancel key will be enabled; it will not be possible to perform any operations on already requested prizes, nor will it be possible to request new ones.

Selezione premi

Anagrafica

Fidelity: 2991111110011 Saldo punti: 2114

Cliente: Ossola MArco Scadenza punti: 11/09/2013

Premi richiesti

Nodo	Cassiere	Data	Premio	Punti	Annul
F50 RO - Rovigo (*)	Cassiere	12/09/2012	Borsa a pois	500	

Cambia stato
Ristampa

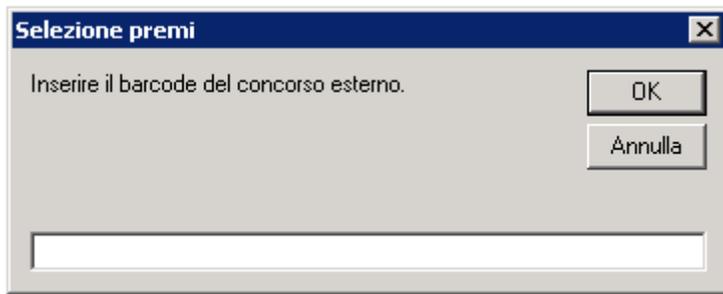
Selezione premi

Premio	Punti previsti	Punti mancanti
Borsa a pois	500	
Valigia morbida	700	
Valigia dura	900	
Bicicletta	1200	
Fotocamera digitale	1500	
TV LCD	2500	386

Conferma Annulla

By selecting a prize the program will register the request creating a specific record in the FidelityMovimenti table and print a non-fiscal receipt, containing the customer's full name (if known), fidelity card code, prize description, points used and the current balance. In addition the courtesy phrase indicated on the catalog form will be printed.

If the selected prize is associated with a partner, the program will ask for entry of the barcode (alphanumeric, upper case maximum 20 characters) related to the contest card (this information will be saved in "FidelityMovimenti" but not used by Stores2).



If the printing is not successful the registration will be cancelled and the customer will be warned of the impossibility to complete the operations. If the operations are successful, a record will be created locally or at the head office regardless of the operating mode.

If configured in online mode, Stores2 will contact the server and directly send the FidelityMovimenti record. In the event of a problem with the connection the operations will not be completed.

The record will be created not specifying the receipt number and assigning the prize code to "ParametroProdotto". In addition we will add a new "Premio" field to the "FidelityMovimenti" table to identify that it involves a prize. The receipt number will be assigned a value with sequential negative numbers only to manage the situation where the same customer requests the same prize on the same day. The "Punti" field will be assigned a value with the number of points which, corresponding to the prize, need to be subtracted from the balance.

If the store personnel makes a mistake in selecting and printing the requested prize, the operator must select the prize selection window and cancel the incorrect one in the list of already requested prizes and request another one if necessary (Change status button). Cancellation of a movement results in recalculation of the point balance, as well as reprocessing of the prize list since some prizes may again be able to be requested with the new point balance. Obviously, in online management, all of these operations must be requested when the line is working. The balance must be updated online in real time. The Change status function cannot be used with a gift card.

If the requested prize is a gift card the program will contact the Web Server Gift which will return a barcode for a gift card of the indicated value. The issued card can then be used like a normal Gift Card.

Selection of multiple gift cards will never be allowed, it will only be possible to print one at a time.

The multiple selection of prizes and possibility to see only selectable prizes are options controlled in the GestioneScontrini.ini file (1 - enabled, 0 - disabled).

[Fidelity]

PremiMultiSelezione = 1

MostraSoloSelezionabili = 1

2.2.1.3 Receipt printing

Information on the fidelity barcode, points accumulated in the current sale and total points will be printed on the sales receipt. In an offline condition, it will not be possible to print the balance situation but we can prepare a courtesy phrase which explains the impossibility of printing the point balance due to connection problems.

In terms of the prize request function, we will include printing of a non-fiscal receipt. We will add a specific field ("ConsentiStampaRicevutaPremio") to the "Casse" table to identify which interfaces will be enabled for printing the receipt.

The modifications will be made for Olivetti Ela interfaces and for non-fiscal printers.

2.2.1.4 Receipt list

The deletion/reset of the fidelity movement records connected to the receipts will also take place online. Stores2 will contact the server to be able to update the FidelityMovimenti table records following deletion/reset operations. If the online update is not successful, the information will reach the head office through normal data sorting channels.