

**Oracle® Retail MICROS Stores2**

Functional Document  
Fidelity - Customer Merge  
Release 1.36

September 2015

Oracle® Retail MICROS Stores2 Functional Document Fidelity - Customer Merge, Release 1.36

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Primary Author: Alessio Ossola

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**MICROS-Retail Italia Srl**

Con socio unico

**Sede Legale**

Via Locarno, 1

I-20900 MONZA

Tel. +39.039/2364.1

Fax +39.039/2364.310

## **TECHNICAL DOCUMENTATION**

*Stores2 - 1.36.0 - Fidelity - Customer merge management*

Report developed by:

**MICROS-Retail srl with sole shareholder**

**Alessio Ossola**

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## Table of contents

<b>1 Introduction .....</b>	<b>3</b>
<b>2 Customer merge management.....</b>	<b>3</b>
<b>2.1 Configuration.....</b>	<b>3</b>
2.1.1 Tool activation .....	3
2.1.1.1 Customer List.....	3
2.1.1.2 Customer search .....	4
2.1.1.3 Customer form .....	4
<b>2.2 Alignment of data from concentrator.....</b>	<b>5</b>
<b>2.3 Operation.....</b>	<b>7</b>
2.3.1 Notes on manual customer selection.....	8
2.3.2 Notes on activation of the "Merge" function from the customer form.....	8
2.3.3 Notes on updating of the "FidelitySostituzioni" table. ....	8
2.3.4 Update of the MovimentiTestate table.....	8
<b>2.4 Final remarks.....</b>	<b>9</b>

**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 merge various customers into a single customer, and assign the latter the fidelity movements (for fidelity cards).

## 2 Customer merge management

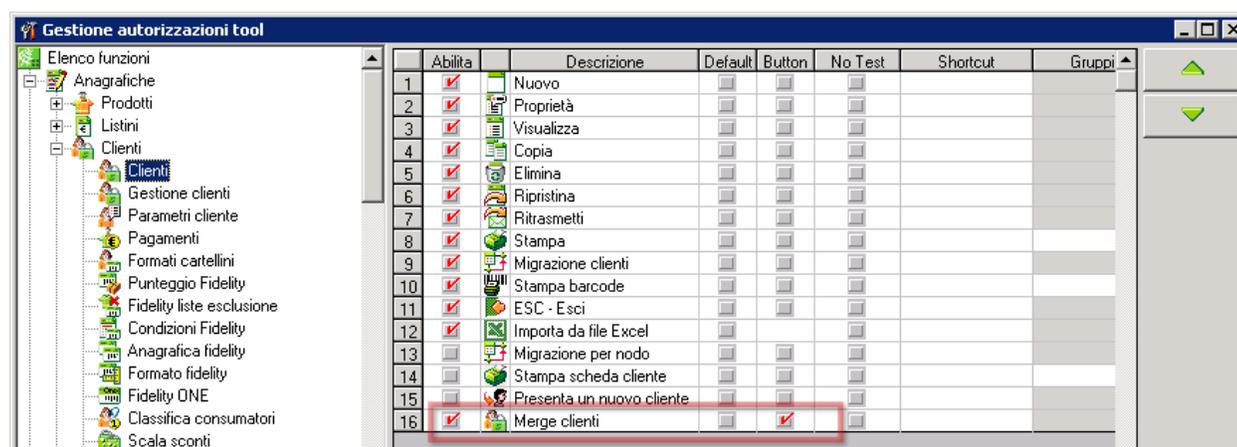
### 2.1 Configuration

#### 2.1.1 Tool activation

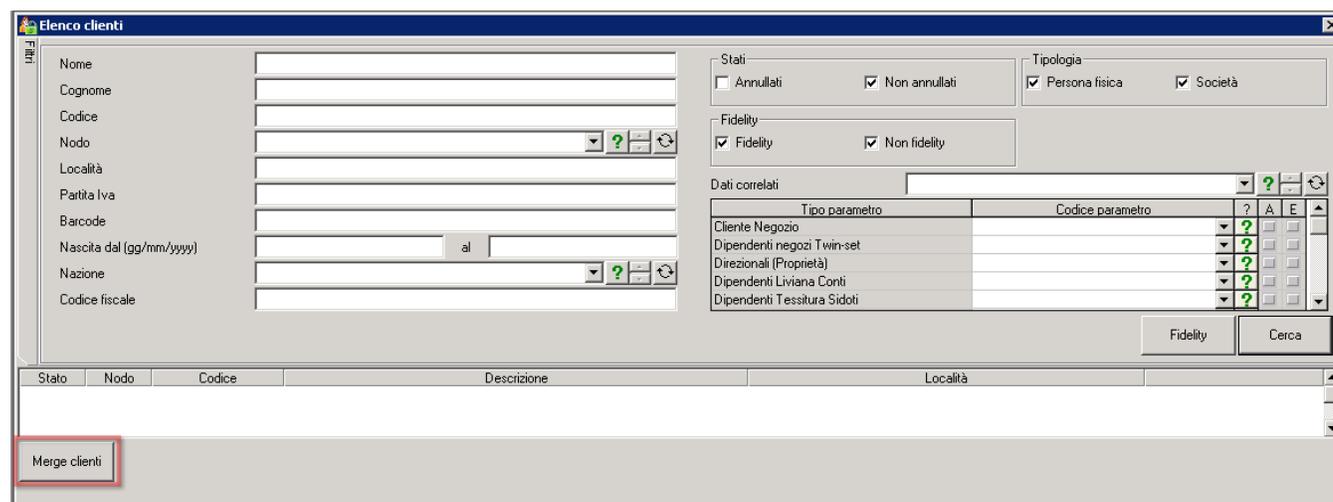
The new tool can be used from the customer list in master data, from customer search in receipt management and from the customer form.

##### 2.1.1.1 Customer List

The customer list tool can be used through operator class authorizations.



A new "Merge customers" tool has been added to the Customer master data section.



### 2.1.1.2 Customer search

To display the new tool in customer search it needs to be activated by script using the following query:

```
UPDATE Elenchi SET ScriptOnEntry='  
Sub ReperisciParametri(vReturn)  
    ReDim vReturn(2)  
    vReturn(0) = False  
    vReturn(1) = False  
    vReturn(2) = True  
End Sub'  
WHERE Elenco=31
```

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

### 2.1.1.3 Customer form

The customer master data form can be configured with the list tables, specifically Filter 98 needs to be displayed in the "ElenchiFiltriCampi" table.

**Gestione clienti**

Anagrafico

Nodo: 000 Sede  
 Codice: 999031355  
 Cognome: Test

Tipo intestatario:  
 Persona fisica  
 Persona giuridica

Nome: Test  
 Cap: 50018  
 Località: SCANDICCI  
 Indirizzo: VIA PISANA 46  
 Provincia: FI Firenze  
 Data nascita: No anno  
 Sesso: Donna  
 Codice fiscale:  
 Partita Iva:  
 Passaporto:  
 Tessera diplomatica:  
 No mailing list:

INVIARE CARTA FEDELTA'

Note:

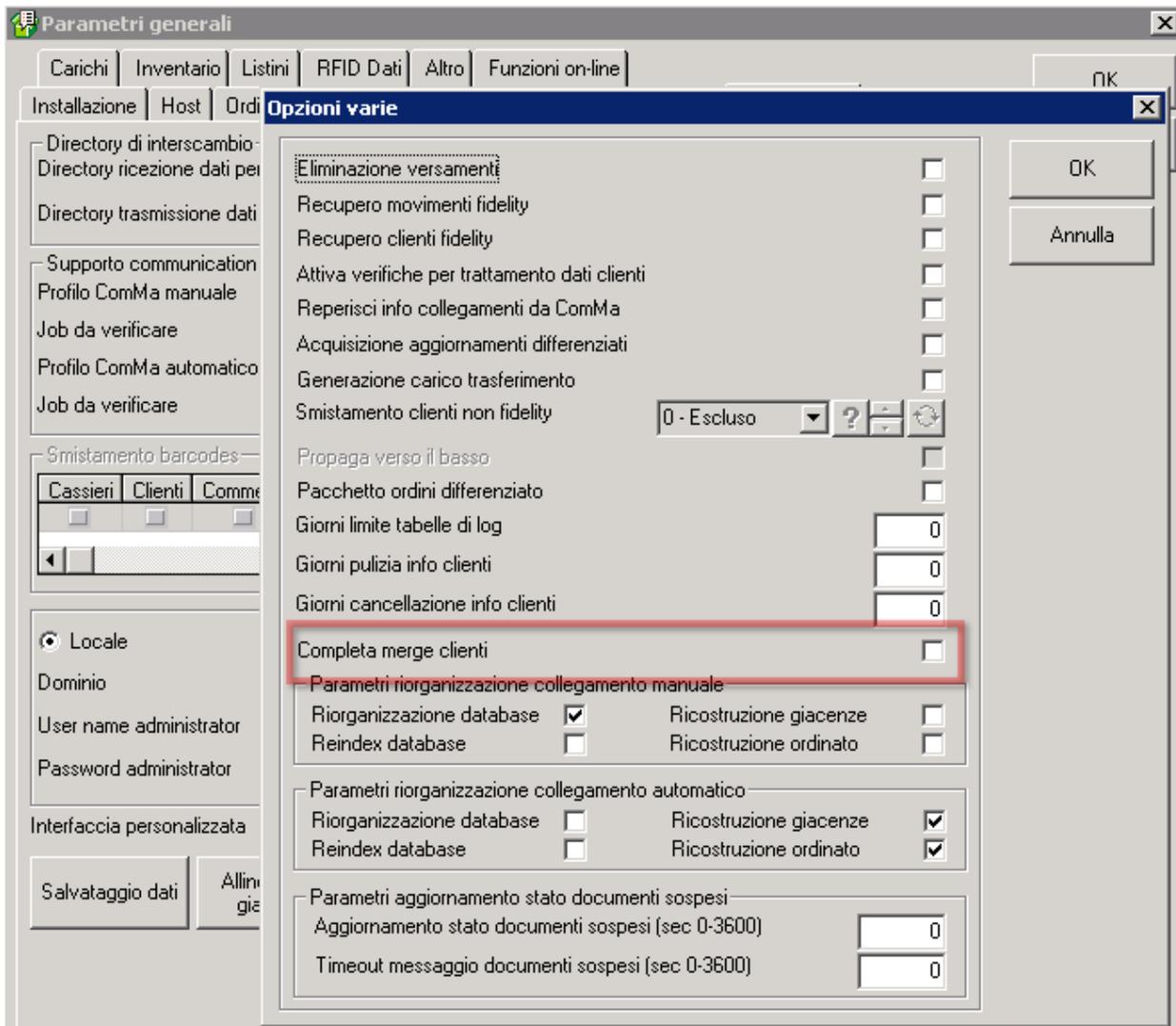
Nazione: Italia  
 Stato:  
 Pagamento:  
 Banca:  
 Barcode: 9010000031355  
 Telefono:  
 Cellulare:  
 Fax:  
 E-Mail:  
 Saldo iniziale:  
 Saldo attuale:  
 Stampa Fattura:

Tipo parametro	Codice parametro	?	A
Cliente Negozio	001 Si	?	<input type="checkbox"/>
Dipendenti negozi Twin-set		?	<input type="checkbox"/>
Direzionali (Proprietà)		?	<input type="checkbox"/>
Dipendenti Liviana Conti		?	<input type="checkbox"/>
Dipendenti Tessitura Sidoti		?	<input type="checkbox"/>
Fornitori - Collaboratori		?	<input type="checkbox"/>
Cliente Outlet		?	<input type="checkbox"/>
Radio/Televisione/Cinema		?	<input type="checkbox"/>
Dipendenti Twin-set		?	<input type="checkbox"/>
Vicinato		?	<input type="checkbox"/>
Vicinato McArthurglen		?	<input type="checkbox"/>

OK  
 Annulla  
 Indirizzi  
 Carte di Credito  
 F2 - Fidelity  
 Merge clienti

## 2.2 Alignment of data from concentrator

To update all of the sales involved in the merge operations, it is necessary to complete the operation directly on the home office concentrator. Currently there are synchronization and data recoding operations on the head office concentrator at the end of the connection. A function has been introduced which, starting from the "FidelitySostituzioni" table, updates the receipts which are still connected to customers for whom the replacement operation has already been done on one of the stores but which did not involve them since they are registered on other nodes.



This operation will be activated through the introduction of the "CompleteCustomerMerge" parameter in the ParametriGeneraliSeconda table (General parameters/Connections/Variious options) and will only involve the head office node.

## 2.3 Operation

From each of the functions indicated above a window will be opened where it will be possible to call the customer to keep and the customers to disable after having migrated the data related to purchases.

Since we have to provide the possibility of calling both fidelity and non-fidelity customers, we will make fields available where the card can be read and a button to select customers who do not possess fidelity cards.

	Barcode	Nodo	Codice	Descrizione		
Cliente	9010000031355	000	999031355	Test Test		
Clienti da disabilitare						
Cliente 1	9010000042453	000	999042453	LUCA GRIMALDI		
Cliente 2						
Cliente 3						
Cliente 4						

As you can see in the figure, the window is divided into two sections, one for the reference customer and the other for customers to disable. Given the fact that it is not possible to exclude beforehand that there are two master data sets connected to the same customer, we decided to make more than one line available to enter the reference information of the customers to disable. We decided that 4 lines seemed reasonable. We will make a text box available for entering the fidelity barcode (even if you do not have physical cards) and two text boxes that will contain the customer's node and code respectively; these text boxes will always be disabled because they are automatically populated by the customer selection, called by pressing the buttons which will be made available for each customer. The customer search button will only be enabled if a barcode has not been entered for the corresponding line. In the event of manual selection of the customer using the search function, the barcode text will be automatically assigned and disabled. The line can be reset using the specific button.

When the window is confirmed the program will check that all of the indicated elements are present in the database where the operations are being performed and that they are valid and will display a summary of the operations being carried out and specify the following information for each involved subject: node, code/barcode, first name and last name.

Migrazione clienti

Verranno associati al cliente 000 - 999031355 Test Test i seguenti clienti :

000 - 999042453 LUCA GRIMALDI

000 - 0000007 MAURO FOSSATI

Vuoi continuare?

Yes No

When this window is confirmed the program will start the data modification operations. For each indicated element the program will:

1. cancel the corresponding records of the "Clienti" and "ProdottiBarcodes" tables,
2. cancel the corresponding records of the "FidelityMovimenti" table and add new ones if the old master data is associated to a fidelity barcode,
3. cancel the corresponding records of the "FidelityCondizioni" table. It is not necessary to add new ones because the position of the customer you decide to keep valid will be kept as a reference. Thus only the ones connected to this customer will remain enabled,
4. update the "TipoIntestatario", "NodoIntestatario", "CodiceIntestatario" and possibly "CodiceFidelity" fields (if the old master data is associated to a fidelity barcode) of the "MovimentiTestate" table with the information related to the master data which remains valid. I would like to underline that the modified data only regard the customer, while the sales data will not be changed. NodoIntestatario means the node where the customer is registered (or the node associated to the customer)
5. add a record to the "FidelitySostituzioni" table, in order to register the performed operation.

### **2.3.1 Notes on manual customer selection**

The quickest way to select a customer is definitely reading the barcode. However, if the customer is not a fidelity customer or the card is unavailable, the operator can select it by calling the list for a search, which will be different based on whether the operations are performed from the master data or receipt management. We will change the program in order to call the currently available search objects and manage the data interchange. No changes to the lists are included in this version.

### **2.3.2 Notes on activation of the "Merge" function from the customer form**

If the procedure is performed directly on the customer form, the information of the section that refers to the customer owner of the form, which will be the reference that remains valid, shall be automatically assigned and cannot be edited.

### **2.3.3 Notes on updating of the "FidelitySostituzioni" table.**

The "FidelitySostituzioni" table is already used to register operations related to fidelity card replacements. Giving that the functionality that we are introducing, even if not the same thing, is similar in some ways, we decided to use the same table updating the fields we considered necessary. The structure of the table includes fields for registering the new and old barcode information but only the fields for registering a customer since the replacement function is used to assign a new card to the same customer. Thus we will add the "NodoClienteVecchio" and "CodiceClienteVecchio" fields. These fields will not have a value assigned for the replacement function. In addition we will add the "TipoOperazione" field to differentiate between replacement and merge operations. We will also change the key which will include the fields "Nodo", "BarcodeNuovo", "BarcodeVecchio", "NodoCliente", "CodiceCliente", "NodoClienteVecchio" and "CodiceClienteVecchio".

### **2.3.4 Update of the MovimentiTestate table**

As indicated above, the MovimentiTestate table is sorted "by branch" thus it is possible that on the store where the merge is performed, all of the master data records and fidelity movements are present but not receipt movements, so it will be possible to perform the operation from the head office node.

## **2.4 Final remarks**

- This management has been developed to operate off-line;
- It will not be possible to perform a merge between customers belonging to different fidelity programs;
- It is possible to migrate a non-fidelity customer and a fidelity customer;