



## POS Integration

Loyalty/TXD/Card Commerce/Ceridian/LiveRes

# Setup & Support Guide

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### Internal Support Document

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<b>Department</b>	Product Release Department
<b>Product</b>	Pos Integration

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**VERSION HISTORY**

<b>Version</b>	<b>Date</b>	<b>Notes</b>	<b>Author</b>
1.6	14 Jan 2015	Updated to include support for Ceridian plugin - on pages 8,37,38,39	Darren Wilson
1.7	24/03/2015	Updated to include support for EsVelte gift card plugin -	Darren Wilson
1.8	01/12/2015	Updated to include workaround for bug 361975	Neale Johnston
1.9	26/04/2016	Updated TXD HO setup instructions	Neale Johnston
2.0	27/06/2017	Addition of LiveRES Connect Information	David Stuart
3.0	30/09/2022	Renamed from the original 'iZone Pos Integration Setup & Support Guide'. Updated name of iZone plugin to Zonal Loyalty. Removed Opera and Esvelte plugin sections as these are covered by more recent documents.	Greg Milne
4.0	13/12/2023	Updated TXD section to add details of new voucher type 'Promotion'.	Mohsin Hasan

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This document describes functionality of the Pos Integration System and associated software and hardware. Zonal Retail Data Systems has made every effort to ensure that the functionality described in the document is an accurate reflection of the software. Zonal Retail Data Systems cannot guarantee however, that the software and documentation are completely and absolutely equivalent.

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## Purpose

To detail the steps required to set up and configure Aztec to use POS Integration functionality. This will include the back of house configuration steps in Aztec, installation instructions for the site services and configuration instructions for the iZone agent.

This guide will cover the setup for Zonal Loyalty (aka iZone, Profitstreams), e-Gift , US Loyalty, Card Commerce and TXD vouchering functionality at head office and the POS usage of each method at site level.

## Intended Audience

This document is intended for use by Zonal test and support staff concerned in the installation and configuration of POS INTEGRATION Loyalty systems and in their support on client sites.

## Pre-Requisites

To enable functionality to set up Pos Integration, Aztec must be at a minimum version of at least 3.5.6.36455 at both Head Office and the intended sites. Please note that in some cases (e.g. Card Commerce), support may not be available at version 3.5.6 and in some cases, certain functionality may not be available.

For Zonal Loyalty you must also be provided with appropriate loyalty card ranges and possess the API token and password for site configuration. These can be retrieved from the Zonal Loyalty web dashboard using Zonal provided login credentials. If using TXD vouchering, you need to have the username and password to access the TXD API.

In both cases, configuration must be completed by Zonal or TXD before the functions at the POS will work correctly.

Finally, you must know the web addresses from which the functions are called. These are listed within this guide for reference but could be subject to change. Please contact product management if you are unsure of the correct URLs to be used.

## Head Office Configuration

The main configuration options required for Pos Integration setup are contained in the Base Data and Finance modules at Head Office. However, there are also some setup steps which involve manually entering data into the Aztec database. For Aztec version 3.5.10 and above these steps are replaced by form entry.

## POS Integration Plugin Settings

### Zonal Loyalty (aka iZone, Profitstreams)

From POS INTEGRATION version 1.0.6.40972 and later, the installer has been changed so that Pos Integration plugin configuration settings (if required) are automatically read from the database. This guide assumes that the following has been entered to the respective plugin tab in Aztec Base data > Estate structure at head office and communicated to site(s).

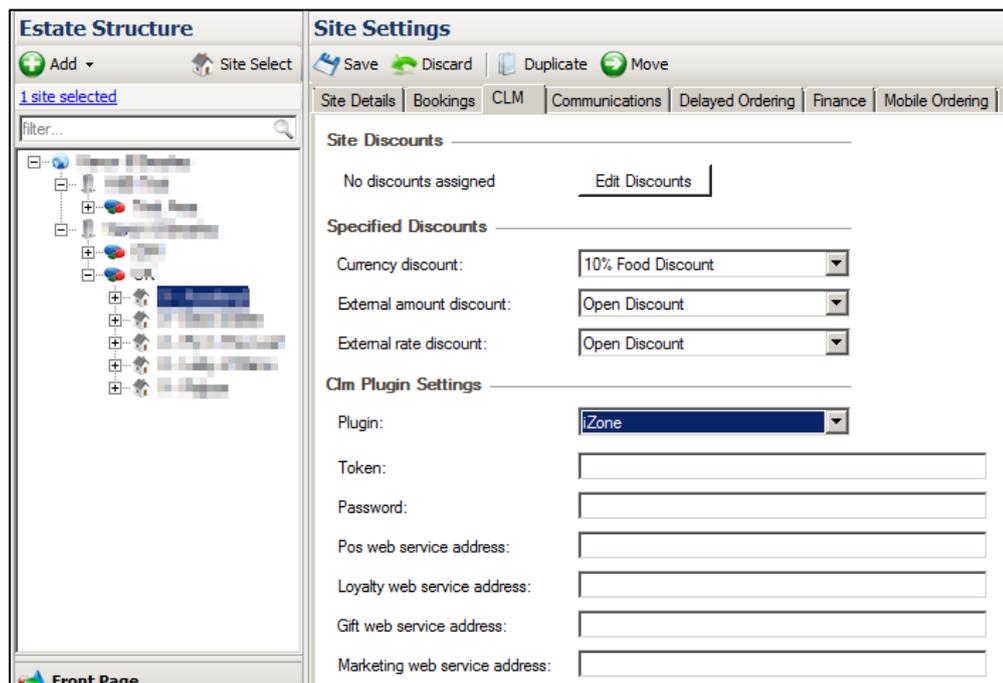
- **Token** (This is the Zonal Loyalty site identifier and must be unique if you need to know where the requests originated from)
- **Password** (Belongs to each unique Zonal Loyalty token identifier)

Token and Password are found by navigating to [Launchpad.izone-app.com](https://launchpad.izone-app.com)

Select Outlets  
Select the Site

Enter <https://loyalty.izone-app.com/v1/poshub> into each address below. They are the same URL for each in the new version of Loyalty.

- **PosWebServiceAddress** (<https://loyalty.izone-app.com/v1/poshub>)
- **LoyaltyWebServiceAddress** (<https://loyalty.izone-app.com/v1/poshub>)
- **GiftWebServiceAddress** (<https://loyalty.izone-app.com/v1/poshub>)
- **MarketingWebServiceAddress** (<https://loyalty.izone-app.com/v1/poshub>)

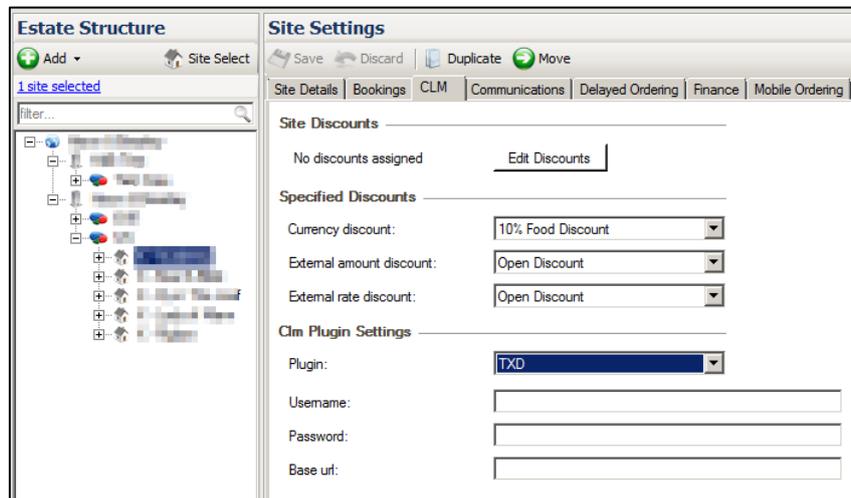


**NOTE** – These settings are only required if the site will be using the Zonal Loyalty plugin. If these settings do not exist at Head office and the installing user asks for the Zonal Loyalty plugin to be installed, then they will be asked for the details at the end of the installation.

**TXD**

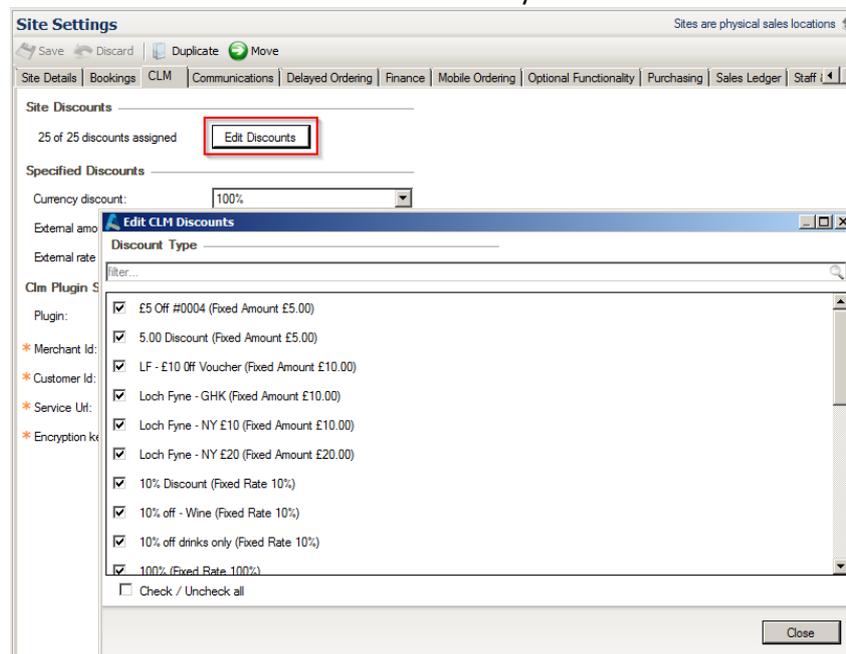
For configuration of TXD the plugin tab in base data > Estate structure needs to be populated with the following data:

- Username
- Password



BaseURL (<https://vouchers.zonalconnect.com>)

Any TXD discounts used by the site need to be selected in the 'Site Discounts' section in Base Data – Estate Settings - <Your Site> - CLM tab – Site Discounts – Edit Discounts before they can be used on the till.



**NOTE** – These settings are only required if the site will be using the TXD plugin. Site will not be asked for these details on completion of the installation if they request the plugin to be installed and it will need to be completed manually.

**Update:** After the release of POS Int 1.52, TXD is able to accept a new voucher type 'Promotion' from Voucher Manager in order to apply a promotion to an account. These voucher types will be able to be associated with an Aztec Promotion ID that can be returned in an API response. This will allow POSInt to inject a promotion into an account when a VM voucher is scanned.

User will need to create a mapping in Aztec HO > Base Data > CLM Settings > Promotions

**NOTE** – If the POS is not aware of the promotion Id applied by a voucher, it will display the error below after the voucher is scanned. This will mean the sales area the POS belongs to has not been selected as a participant in the promotion: Promotions Module > Promotion > Selected Sites/Sales Areas



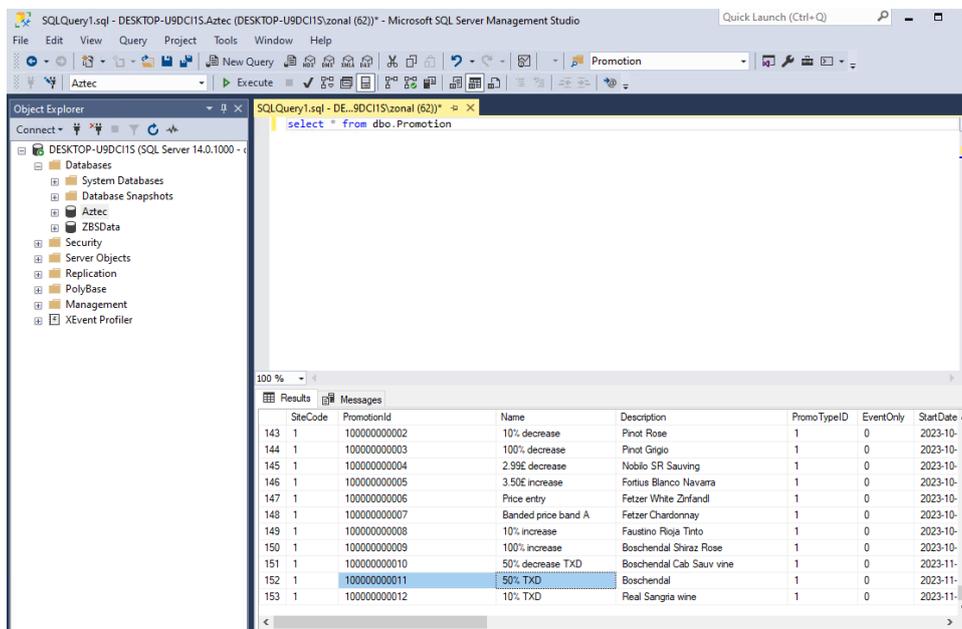
### How to configure an Aztec promotion to be enabled via a Voucher Manager Voucher

1. Create a new promotion or decide on an existing promotion that you wish to be enabled via a voucher.

Notes:

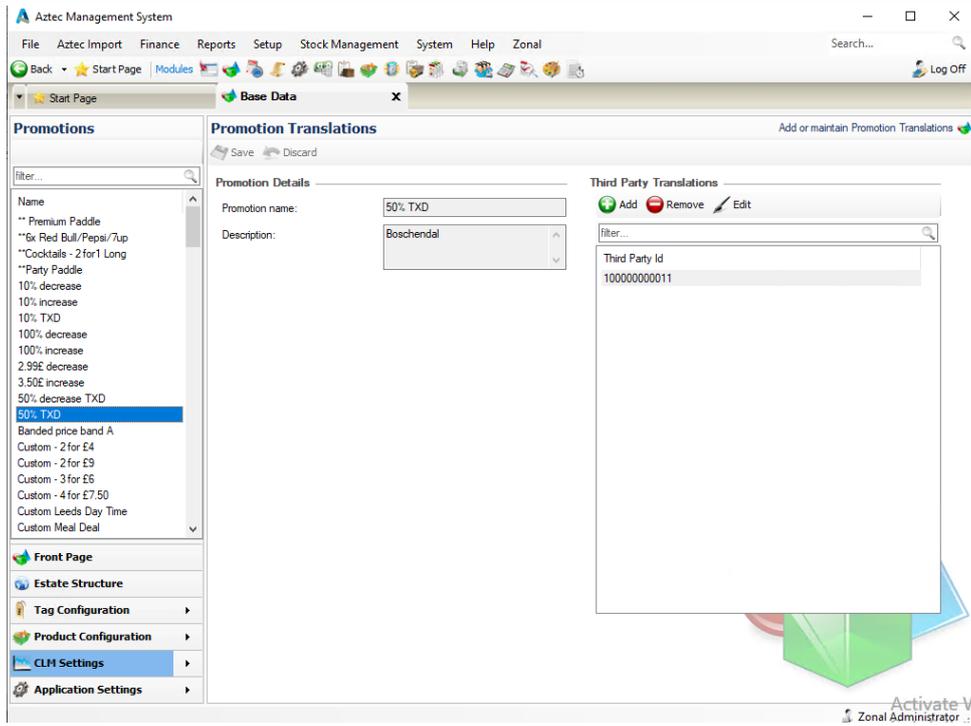
- (a) Once configured, this promotion can only be applied to a PoS account if a relevant voucher is applied.
- (b) The other conditions of the promotion also still apply e.g. active days/times, required products rung up.

2. Find out the Aztec Id of the promotion from (1). Go to SQL and find "PromotionId" in table "dbo.Promotion", by Promotion name.



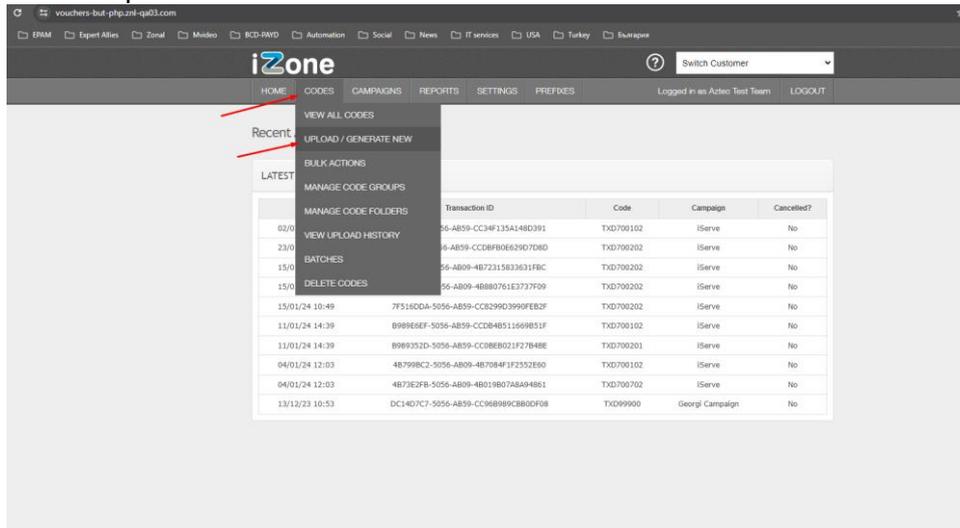
3. In Aztec go to Base Data > CLM Settings > Promotions > Third Party Translations. Add a mapping from your chosen promotion name to the Id of your chosen promotion. Save.

## POS Integration Setup & Support Guide

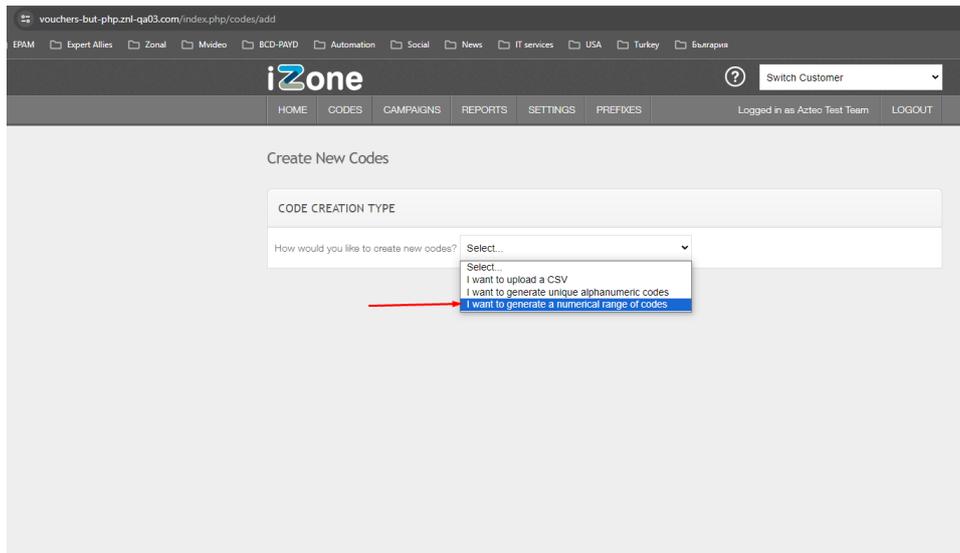


4. Using [Voucher Manager](#) , create a set of voucher codes with:

- Click on Codes > Upload > Generate New



- Select 'I want to generate a numerical range of codes'

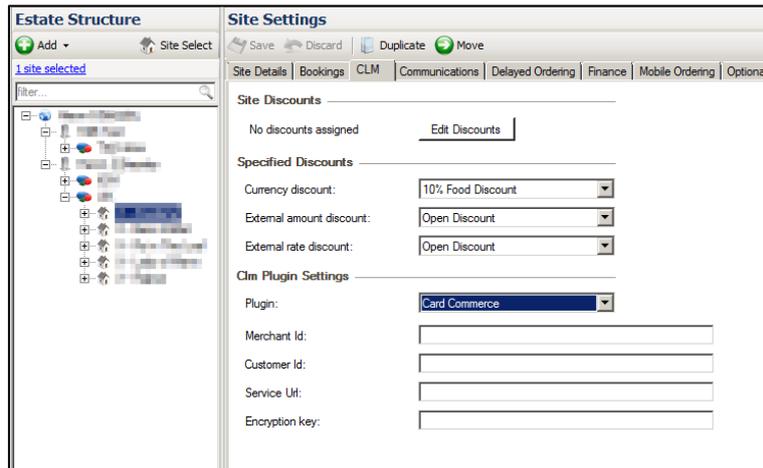


- Select Redemption Type = Promotion
  - Add Aztec Item Code = <Your promotion Id>
5. Add the **TXD Apply Promotion** button to your PoS
  6. Perform a Comms job to site (if applicable) and then a Send-to-PoS operation.

## Card Commerce

For configuration of Card Commerce Plugin the tab in base data > Estate structure needs to be populated with the following data:

- Merchant id:
- Customer id:
- Service Url:
- Encryption key

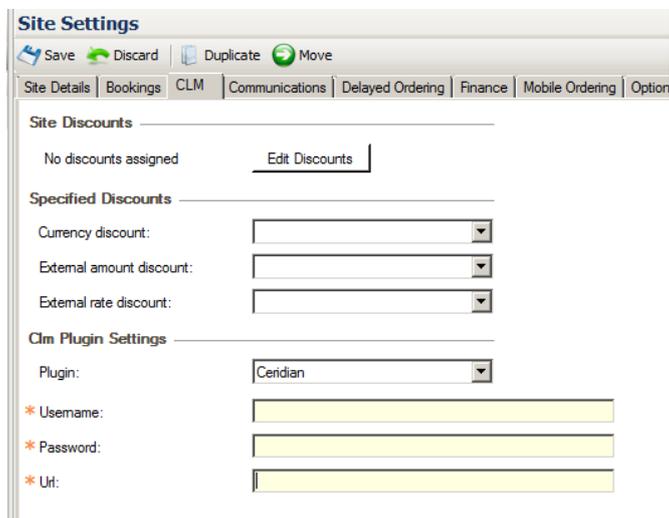


**IMPORTANT** - If these fields have valid details entered, then the user can non-interactively install or upgrade Pos Integration using the distribution manifests created with the release of version 1.1.0.41390.

## Ceridian

For configuration of the Ceridian Plugin the tab in base data > Estate structure needs to be populated with the following data:

- Username:
- Password:
- Url:



To setup the Ceridian payment method go to finance/payment methods and select add, assign a meaningful name & description from the “type” drop down menu select “Ceridian Gift Card” and select save.

Navigate to theme modelling/themes and add the newly created payment button to the theme

Plugin Prefix and Ranges.

Card ranges will need to be supplied to the system so they can be validated by the Epos system prior to redemption or refund attempts.

Navigating to the Base Data module and choosing CLM Settings > Prefix Group from the side bar either create a new Prefix Group or use an existing one (except Disabled).

### Corby and Fellas

Before the Base Data information can be added for Corby and Fellas, the CorbyPluginSettingsHO.sql script must be run against the HO database. This will add the “EGift” option to the plugin dropdown

For configuration of the Corby and Fellas Plugin the “EGift” option should be selected from the plugin dropdown in the CLM tab in Base Data > Estate Structure. This needs to be populated with the following data:

- Username:
- Password:
- Url:

Site Details | Bookings | **CLM** | Communications | Delayed Ordering | Finance | Mobile Ordering | Opti

**Site Discounts**

No discounts assigned [Edit Discounts](#)

**Specified Discounts**

Currency discount:

External amount discount:

External rate discount:

**CLM Plugin Settings**

Plugin:

\* Username:

\* Password:

\* Url:

To setup the Corby and Fellas payment method go to Finance > Payment Methods and select add and assign a meaningful name & description. From the “Type” drop down menu select “CLM e-Gift Card” and click Finish.

**Payment Method Details**

\* Payment method name:

Payment method description:

Account code:

Use fixed payment amount:

Barcodes unique per account:

Type:

Currency:

Amount of:

Fixed payment amount:

**Declaration Details**

Auto declare:

Show during blind declaration:

**POS Display Details**

Generate button text:  Automatically from name  Manually

\* POS button text:  

**POS Behaviour**

Product group:

Open cash drawer:

Auto print receipt:

Overpayment is:  Not Allowed

Navigate to theme modelling/themes and add the newly created payment button to the theme.

The “e-Gift Balance Check” button should also be added to the theme at this point.

**Plugin Prefix and Ranges.**

Card ranges will need to be supplied to the system so they can be validated by the EPOS system prior to redemption or refund attempts. This is done in Base Data > CLM Settings > Prefix Group. These should be assigned under the “e-Gift” account.

Navigating to the Base Data module and choosing CLM Settings > Prefix Group from the side bar either create a new Prefix Group or use an existing one (except Disabled).

**LiveRES Connect**

The LiveRES Connect plugin is supported on Aztec 3.6.2 and higher, but on versions lower than 3.10.0 a SQL script needs to be run at head office to allow the plugin information to be configured.

The SQL script (CLM\_117\_Install\_SQL.sql) can be found alongside the release of Pos Integration and must be run against the Aztec head office database.

The SQL updates the following:

- Database Tables
  - ThemeEFTRule
  - ThemeCLMAccount
  - Ac\_CLMPlugins
  - Ac\_CLMPluginSettings
- Database Views:
  - Ac\_ClmBooking
  - Ac\_ClmBookingDeposit
  - Ac\_ClmBookingRedemption
- Database Function
  - Ac\_fnClmGetChangedBookings

In addition to the SQL above an entry needs to be added to the head office GlobalConfiguration table with a KeyName of PlatFormServicesEstateID. This must be added to allow the LiveRES connect plugin to initialise at site.

For configuration of the LiveRES connect plugin the tab in base data > Estate structure needs to be populated with the following data:

- Token
- Password
- BaseUri
- Sync from (yyyy-mm-dd hh:mm) – This must match the format displayed to allow the plugin to initialise correctly.

The screenshot shows the 'Site Settings' interface with the 'CLM' tab selected. The 'CLM Plugin Settings' section is expanded, showing the following fields:

- Plugin: LiveRes Connect (dropdown menu)
- \* Token: [Text input field]
- \* Password: [Text input field]
- \* BaseUri: [Text input field]
- \* Sync from (yyyy-MM-dd hh:mm): [Text input field]

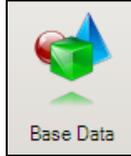
Other sections visible include 'Site Discounts' (1 of 936 discounts assigned) and 'Specified Discounts' (Currency discount, External amount discount, External rate discount).

The “Sync from” entry is used to configure when bookings created on site will be synchronised with LiveRES. The bookings are synchronised based on their creation date with in Aztec so can be configured to a future date to prevent sending bookings up that already exist in LiveRES.

## Prefix Setup & Site Assignment

The first step to configuring Loyalty, e-Gift or TXD for a customer is to set up the card ranges that Aztec can utilise at the POS to identify the different types of requests that are supported by the functionality.

1. Authenticate to Aztec at Head Office and launch the Base Data module from the shell:



2. Navigate to the 'CLM Settings' menu in the left hand navigation pane
3. Click 'Add' to create a prefix group:

 A screenshot of a software dialog box titled 'New Prefix Group'. The main heading is 'Create Prefix Group' with a sub-instruction: 'Enter the new prefix group details in the fields below.' There is a text input field for 'Group name' containing 'Test Group'. Below this is a table with columns: 'Account', 'Prefix', 'Min Length', 'Max Length', and 'Exception'. Above the table are buttons for 'Add', 'Remove', and 'Edit'. At the bottom of the dialog are buttons for '< Back', 'Next >', 'Finish', and 'Cancel'.

**NOTE** - Each site may be assigned to only one prefix group; however, card ranges can be duplicated across more than one prefix group. EG: If you have only one set of card ranges used by all sites, you will need just one prefix group. If you have separate cards used in each area, you will need a prefix group per area. If you have different cards used in each area, but a common staff card range available for all sites, you will need a prefix group per area, but each will contain the same staff card prefix range

4. Click 'Add' within the 'New Prefix Group' wizard and this dialog will appear:

There are 3 different account types which can be set up. These are as follows:

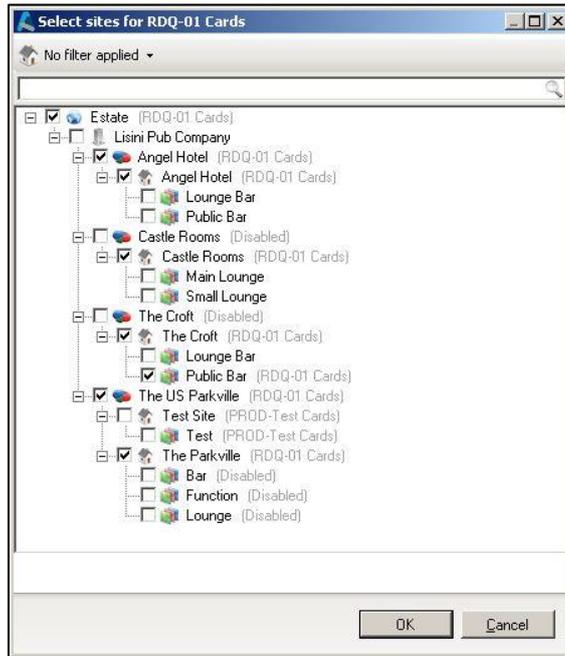
- **Loyalty** – This is the standard type of loyalty offered by Zonal and allows connection to Zonal Loyalty or 'MoeGenius' loyalty plugins. Loyalty customers are part of a program which will allow them to accrue points / prizes / cash against any or all POS accounts.
- **e-Gift** – This option allows functions to be used which are like a gift card. Customers can buy a gift card, load a cash value onto it and then spend the balance as cash on any site which has valid e-gift card prefixes defined. These gift cards can be multi-use and have extra funds loaded onto them via the POS.
- **TXD** – TXD vouchers are one-time use vouchers which can be used to ring up items at the POS, apply discounts to the account or make payments against the POS accounts.

The user should define the prefixes required for their operational needs. The customer is responsible for ensuring that the prefixes they set up match what has been defined by the 3<sup>rd</sup> party companies providing their solutions (TXD, MoeGenius etc.). Please also ensure that the minimum and maximum lengths of the ID's are accurate.

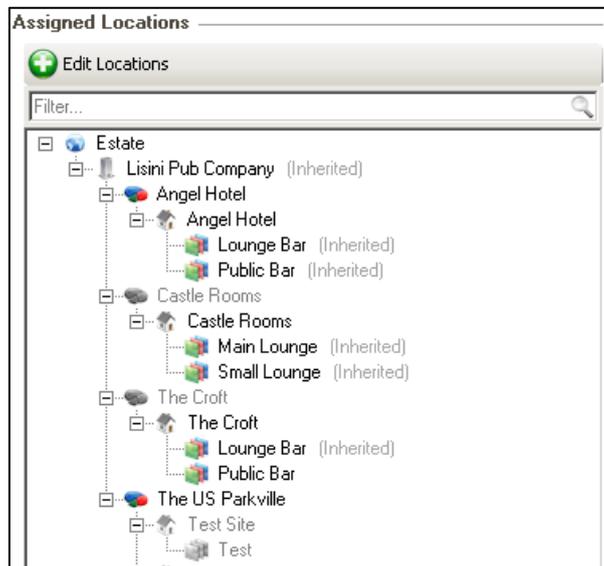
Account	Prefix	Min Len...	Max Le...	Exception
TXD	TXD	20	40	<input type="checkbox"/>
e-Gift	93513128000003	15	15	<input type="checkbox"/>
Loyalty	93513128000000	15	16	<input type="checkbox"/>
TXD	TX1234	30	35	<input type="checkbox"/>
Loyalty	TEST12345	15	20	<input type="checkbox"/>

If prefix ranges are to be explicitly disallowed at the POS, then these can be set up as exceptions. Please note that settings up these prefixes does not ensure that the loyalty functions work at the POS, it simply allows the POS to identify which requests should be sent to which 3<sup>rd</sup> party.

- After setting up prefixes, click the 'Edit Locations' function to assign the prefixes to the appropriate levels of your estate:



**NOTE** - This tree selection view works differently from other tree selection views within Aztec. If you click a company level check box, this does not automatically fill in all the child entities. The children will inherit the permissions from a parent node automatically but can be explicitly overridden if required:

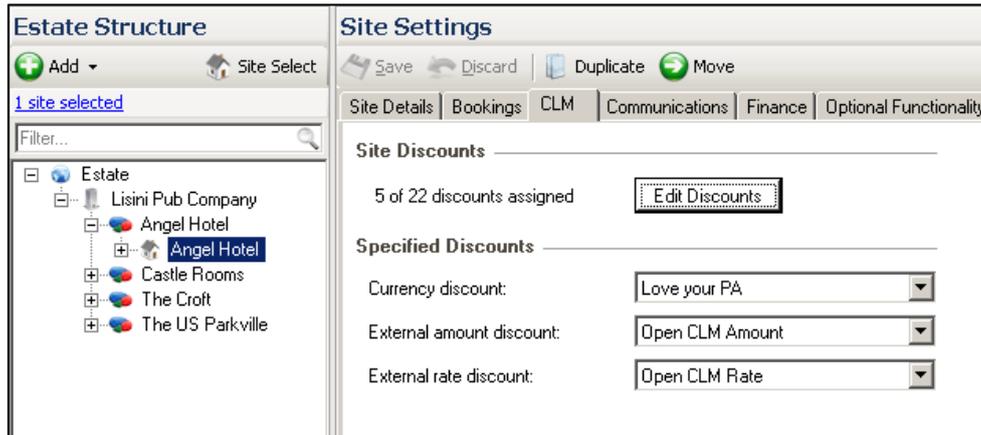


Items which are explicitly set as other prefix groups (In the image above – the 'Castle Rooms' area is an example) are shown greyed. If an entity is explicitly set for this prefix group, then it is shown in black and if the prefix groups are inherited from an entity further up the tree these are shown black with inherited in brackets.

We allow setting of the accepted prefix ranges down to sales area level so that if required, sites could be set up to only accept certain cards in certain areas.

**IMPORTANT** – Best practice is to assign the card prefixes as far up the tree as possible to simplify setup. Setting each site individually if all the sites are going to accept the same cards is not recommended and will complicate setup.

6. Navigate to estate structure, select a site and then select the 'CLM' tab:



The user needs to define which, if any of these discount types need to be specified. For the 'Site Discounts', simply select here which discounts it will be possible to redeem as prizes through Zonal Loyalty at site level. You may have a 50% off reward set up in the Zonal Loyalty program that you want available to all card holders but only at specific sites. This setup allows you to enable that discount as a possible Zonal Loyalty reward per site.

The 'Specified Discounts' fields are slightly different:

- The '**Currency Discount**' allows us to spend a cash balance on a loyalty account as a discount.
  - This acts like a payment method but as it is a discount, no tax is applied. Either 'Open' or 'Fixed Rate' type discounts can be selected here
- The '**External amount discount**' is for a feature in Zonal Loyalty where they allow a discount to be applied to a single instance of a product on an account (Say £1 off a pint of Guinness, but only 1 per customer).
  - This feature has currently not been implemented on the Zonal Loyalty website so the setting is not yet needed
- The '**External rate discount**' is similar but instead of an amount discount, it would be a percentage (Say 50% off a pint of Guinness, only 1 per customer).
  - This reduces a product price to a percentage-reduced price set (the percentage discount and the product) on the Zonal Loyalty website

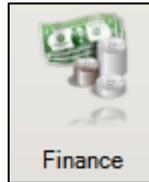
All these 3 discounts ideally should never be mapped onto panel designs for the site to access as they should be redeemable only via loyalty functions.

**For Aztec version 3.5.10.43569 and above instructions can be found in the New Features Guide.**

## Payment Method Setup

There are 2 new payment method types being introduced by the loyalty & gift functionality which can be set up if required by the business. It is not mandatory that these be set up.

1. Authenticate to Aztec and launch the finance module from the shell:



2. Navigate to the payment methods configuration
3. Add a new payment method which utilises either the new payment type “CLM Charge Gift Card” (Corresponds to currency balance on the Zonal Loyalty side) or “CLM e-Gift Card”:

4. Once details are configured, save the changes and close the finance module

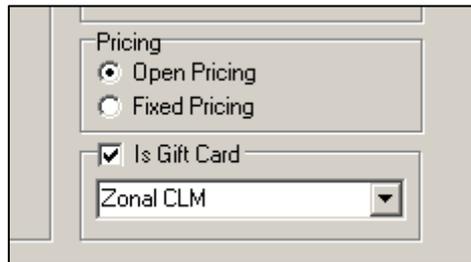
The payment method types work as follows:

- **CLM Charge Gift Card** – This allows users to pay for products using a cash balance on their gift or loyalty card. This is similar to the currency discount detailed in the previous section of this document but as it’s a payment, it is taxed (Discounts are not taxed). The account can be paid in full or in part.
- **CLM e-Gift Card** – This allows users to pay for accounts using pre-paid gift cards with balances available. The account can be paid in full or in part. Again, as it is a payment the products paid for will have tax amount audited against them.

## e-Gift Product Setup

With the introduction of the e-Gift functionality, we allow the user to top up the gift card at the POS. This functionality typically will integrate with a third party (e.g. Card Commerce) who provides the gift cards. This requires products to be set up so that the top ups can be processed.

1. Authenticate to Aztec at Head Office and launch Product Modelling
2. Insert a new standard line product and call it something appropriate (e-Gift top up e.g.)
3. Set the pricing radio button to 'Open', check the 'Is Gift Card' box and select 'Zonal CLM' from the drop down:



The screenshot shows a software interface for product configuration. It features a 'Pricing' section with two radio buttons: 'Open Pricing' (which is selected) and 'Fixed Pricing'. Below this is a checked checkbox labeled 'Is Gift Card'. Underneath the checkbox is a dropdown menu currently displaying 'Zonal CLM'.

4. Close Product Modelling
5. Open Theme Modelling and add the product onto a panel design in use by site
6. Save the panel design and communicate the changes to site

The gift card product can be open priced or fixed priced or if desired both types can be set up. If the product is fixed price then it should be priced through Standard Pricing in the usual way.

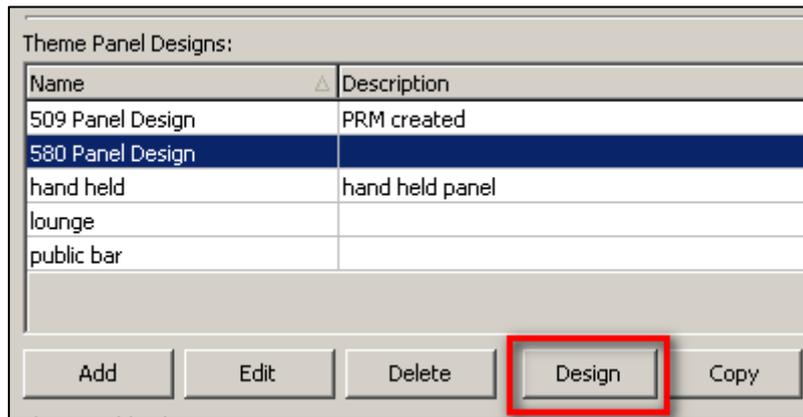
Please note that if your e-Gift products are recipes and an export to Recipe Modelling has been performed, the item will need to be edited in Recipe Modelling rather than Product Modelling.

## Theme Design Setup

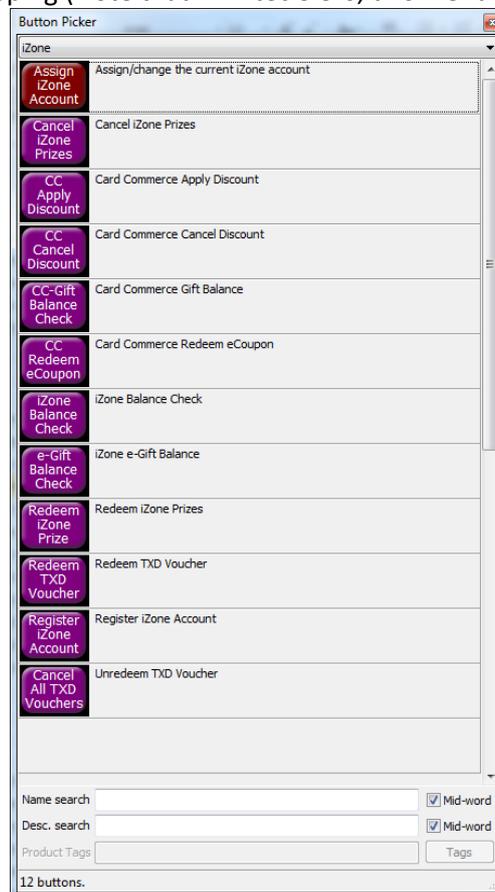
1. Launch the Theme Modelling module from the shell:



2. Navigate to 'Themes' and select the panel design being used on the POS then click 'Design':



3. Once the design loads, use the button picker and select 'Other Lists' -> 'iZone' to gain access to the Pos Integration functions for mapping (Note that in Aztec 3.5.6, this menu is called 'CLM'):



- Map the functions that are required for use onto the panel design.

In example data, we have a panel dedicated to discounts and loyalty functions and this appears like this:



The theme design can then be saved and all the changes communicated to site through the Communications module using a 'send' comms job. (Check the 'Auto Send to POS' flag to send the changes to the terminals)

The next step is to install the iZone agent at site along with the Zonal CLM service and any other plugins required to allow the terminal to use the loyalty functions.

## Site Service Setup & Configuration

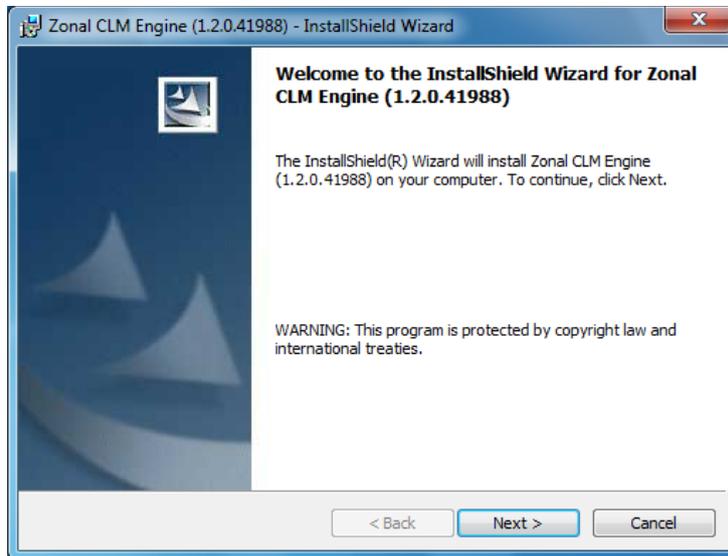
*NOTE – As of Pos integration 1.7.3 Zonal Loyalty can be installed with no credentials specified and populated using the standard aztec comms process from head office, however the service needs to be restarted to pick up new credentials. A manifest currently exists “R:\Tools\Distribution Manifests\Static\CLM\Service Restart” that will restart the service remotely.*

The following steps detail how to install the Zonal CLM service and agent at site level and also configure the agent software. It is assumed that the necessary Zonal CLM installer is present and that this is the first installation of the software on the target PC. At the time of publication, the current version to be installed is CLM version 1.1.0.41390.

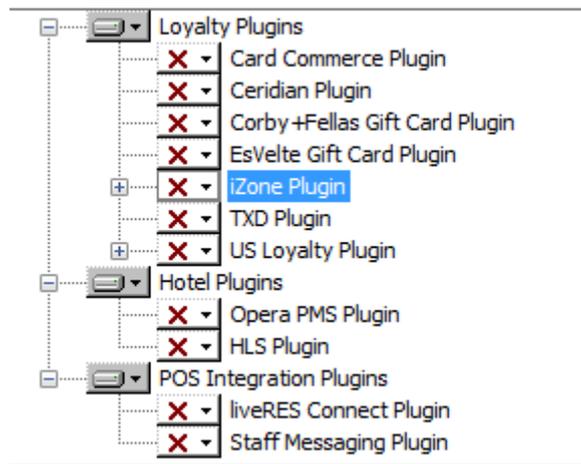
1. Run the CLM installer under an administrative profile on the target PC:



Once the MSI packages have decompressed the installer will ask the user to continue the installation:

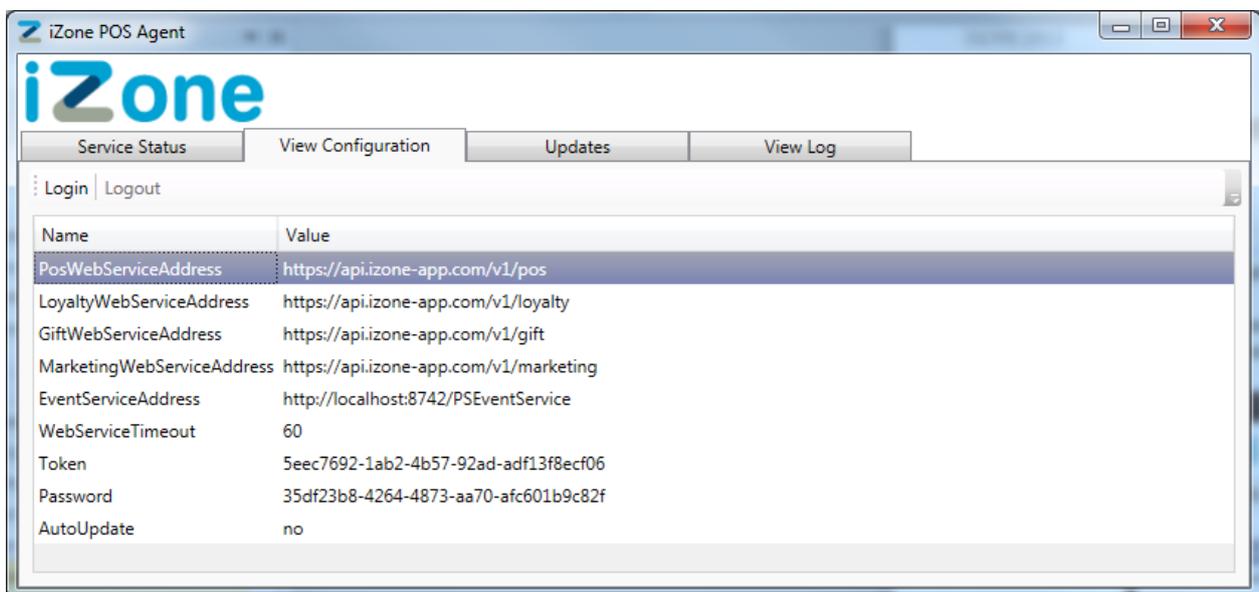


- Once the user clicks next, they will be prompted to specific a 'Complete' or 'Custom' installation. Selecting custom will present them with this list:



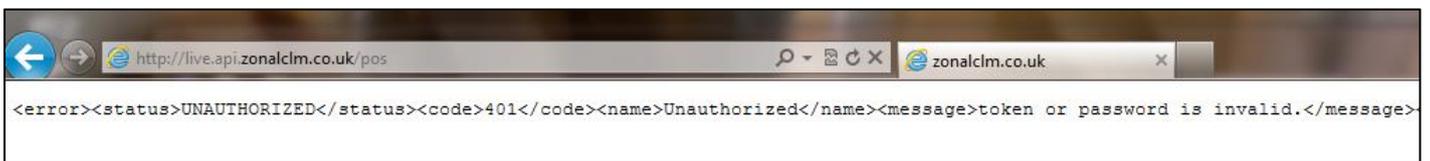
The TXD, Card Commerce, US Loyalty and Zonal Loyalty plugin's can exist without each other but the US loyalty and Zonal Loyalty plugin cannot exist together. The installer can also be called via command line and the syntax required for command line installations is available in the appendix.

- Select the required components and click 'next' and the installer will complete
- Once the wizard disappears, the user will be asked to enter the necessary Zonal Loyalty URL and authentication data if no configuration data exists in base data at Head office:



- <https://api.izone-app.com/v1/pos>
- <https://api.izone-app.com/v1/loyalty>
- <https://api.izone-app.com/v1/gift>
- <https://api.izone-app.com/v1/marketing>

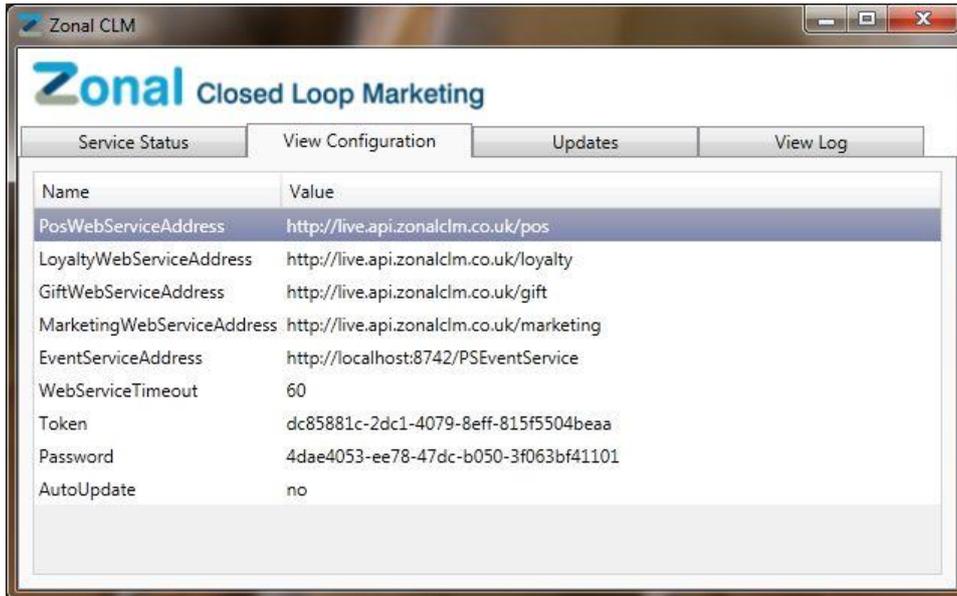
If you want to see if these addresses resolve, then open a web browser and navigate to the URL. You will see some XML returned (Most likely with an error message):



If you do not see the XML, then it is likely there is a connection issue with the site PC -> internet.

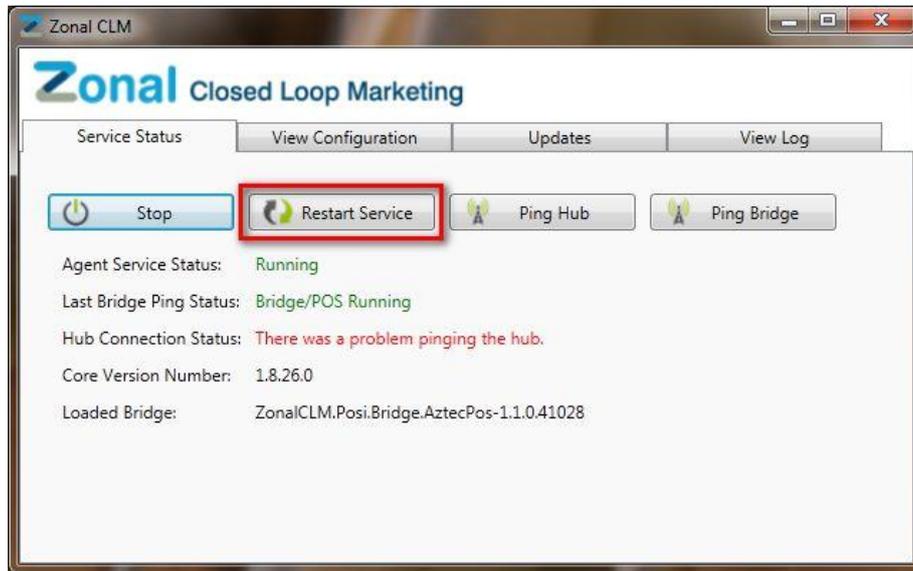
If you are unsure of the addresses to be used, please contact product management.

- To complete configuration of the iZone agent, the correct token and password must be entered. This is unique per site and is used for site identification so care must be taken that the correct details are entered:



*NOTE – The token and password can be obtained from the Zonal Loyalty web portal where the site has its details configured. If you need access to the Zonal Loyalty website then please contact the Zonal Loyalty support team ([iZoneSupport@Zonal.co.uk](mailto:iZoneSupport@Zonal.co.uk)).*

- Once entered, click continue which will take you to a service status menu from where we need to restart the Zonal CLM service. If there are configuration issues or the URL’s are unresolvable, the “Hub connection status” will continue to show an error. Otherwise, it will show “Token and Password verified”:



- If using the TXD plugin, then the user needs to specify the connection and authentication details in the shell at head office. If using Aztec 3.5.6 or 3.5.8 however, open AztecSQL and insert the appropriate values (TXD will provide these to each customer – via the BDM or Product Management) into the ‘ac\_ClmTxdSettings’ table for the SiteID:

name	SiteId	Username	Password	BaseUrl
ac_ClmCardPrefixGroupItem	1	ZonalTestSite2	Password2	http://zonalclm.txdlimited.co.uk/api/
ac_ClmProfitStreamsSettings				

The TXD url to access their API should always be set to this address:

**(<http://zonalAztecGw.txdlimited.co.uk/>)**

This is irrespective of the customer being installed. Once the correct username and password combinations are inserted at head office, comms the settings down to site.

- Finally, restart the Zonal CLM service from the ‘services.msc’ feature of the O/S:

Service Name	Description	Status	Startup Type	Location
Workstation	Creates and maintains client network connections to remote s...	Started	Automatic	Network S...
WWAN AutoConfig	This service manages mobile broadband (GSM & CDMA) data...		Manual	Local Service
<b>Zonal CLM Service</b>	<b>Service to manage EPOS CLM requests</b>	<b>Started</b>	<b>Automatic</b>	<b>Local Syste...</b>
Zonal EFT		Started	Automatic	Local Syste...
Zonal Payment U...		Started	Automatic	Local Syste...

## Adding Prefixes to Zonal Loyalty cards via config file

There are certain limitations in the loyalty engine (SparkBase) which mean that we cannot always migrate existing customer loyalty cards (Say from a pre-existing scheme) without overlapping another customer's loyalty scheme already loaded into SparkBase. To work round this, we can make amendments to the "Configuration.XML" file located in C:\Program Files\Zonal\CLM to manipulate the card number we send to SparkBase. The rules are as follows:

### Prefix Rules Formatting

- Any number of entries are allowed providing they are numbered consecutively and start at PrefixRules1
- Format is A:B+C where A is the prefix on the card to look for, B is the length of the card number and C is the prefix to add

e.g.

To add a '305' to all five digit cards you will need the following entry -

```
<SectionItem key="PrefixRules1" value=":5+305" />
```

- Alternatively, to take all cards starting 3456 which are between 14 and 16 characters long and add the prefix '12' you will need to add -

```
<SectionItem key="PrefixRules1" value="3456:14+12" />
```

```
<SectionItem key="PrefixRules2" value="3456:15+12" />
```

```
<SectionItem key="PrefixRules3" value="3456:16+12" />
```

In addition, if site were using 5 digit card numbers and the prefix added to the number takes the total length to 8 digits, you **MUST** set up both 5 and 8 digit prefixes so that the POS will always assign the loyalty identifier to the account. So, for the example above with a prefix of 305 and assuming the card range is 20000-29999 then you would set up the following prefixes:

- Prefix – 2, Min Length – 5, Max Length – 5
- Prefix – 305, Min Length – 8, Max Length - 8

## Security Access Rights

To allow the iZone agent to run within a non-administration profile and to ensure the applications run successfully read/execute/write/modify privileges must be set against the following folders (Changes should propagate to the sub-folders automatically):

- **C:\Program Files\Zonal**
- **%ProgramData%\Zonal**
- **%ProgramData%\ZonalCLM**

Note that the %ProgramData% variable is different depending on the Windows platform. Windows 7 is C:\ProgramData but older versions of Windows (Pre-Vista) are C:\Documents and Settings\All Users\Application Data.

The final step is to register the non-admin user against the .NET Framework RSA key which allows the agent application to run. The CLM installation package has been enhanced to automatically register both local and domain users who have used the PC. Should issues still be encountered under a particular user profile (e.g. A new user who has never previously logged on), the following steps can be taken to register a user manually against the RSA key.

This is performed at a command line in the location:

- **C:\Windows\Microsoft.NET\Framework\v4.0.30319**

At the command line in this directory, run this command:

- **Aspnet\_regiis -pa "NetFrameworkConfigurationKey" "{User}"**

Substitute the Windows username (Include domain if required i.e. "zonal\CLMuser") into the second pair of speech marks and execute. This will give the named user access to the RSA key container and allow the application to load.

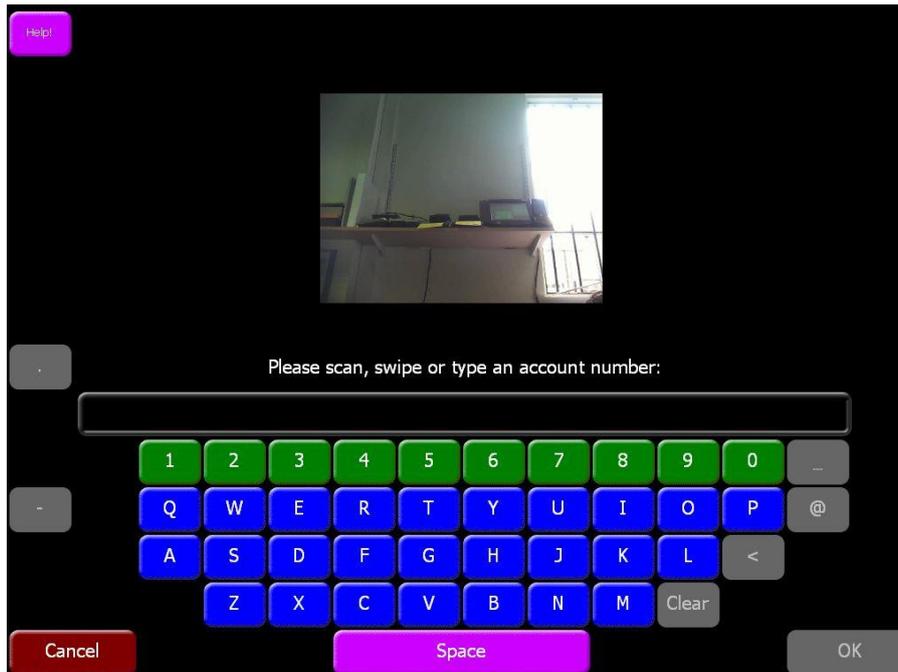
**NOTE** – When running the command line, the DOS prompt must be run as an administrator or under an administrative login. Otherwise, the command line will fail to recognise the existence of the key.

## POS Usage & Behaviour

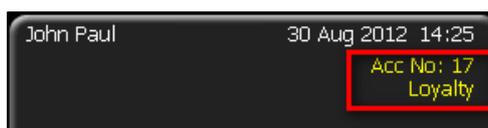
While these functions are performed at POS, the traffic is routed via the Zonal CLM Service and agent on the BoH PC and through the PC's internet connection. You can close accounts with loyalty identifiers assigned but if no internet connectivity is present then prize redemptions, cancellations and balance checks will be unavailable.

### Zonal Loyalty Functions

There are several ways a loyalty customer can be identified at the POS. A card can be swiped at any time to identify a loyalty customer or a barcode can be scanned, and if the "Assign iZone Account" function is used, this also allows the user to type the number in manually or on an i700 device, scan a QR code from either of the cameras:



1. Once identified, the Order display will show the user that a loyalty account is tied to the account:



*NOTE – There is a new audit element created at the POS which is read into the new 'LoyaltyAccountAssigned' table*

2. The 'Assign iZone Account' button acts as a toggle so if the wrong card was swiped against the account, the user can press the button to remove the loyalty card assignment. Toggling the button will show this message:



The only caveat to removing the assignment from an account is if prize redemption has taken place on the account. If this has occurred then the loyalty account is locked into the account till the account is closed and finalised. Even if a prize is redeemed and then cancelled, the loyalty identifier remains locked to the account and cannot be removed.

3. If the user wants to check the customers loyalty balance, press the 'Loyalty Balance Check' function which will then attempt to contact Zonal Loyalty to retrieve the data:



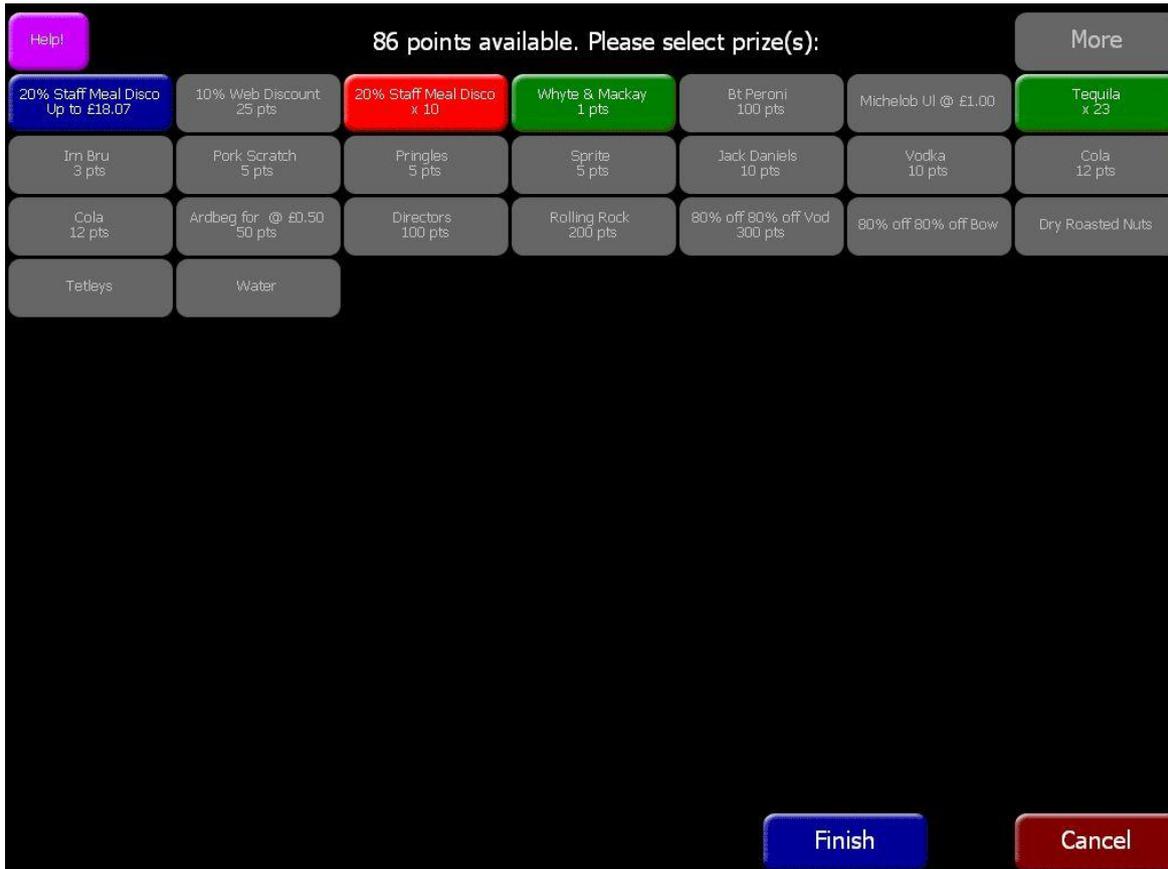
4. When the data is retrieved, the POS user will be presented with a screen like this:



*Points Balance can be linked at iZone to lifetime spend (i.e. Spend £20, get 20 points, accrue 50 points to get a product reward), product rewards are the total number of available product prizes, discount rewards are the number of different discount prizes available and balance is the currency amount available to spend via discounts or payments.*

The user can select 'Print' which will print off a hard copy of the information shown in the dialog along with site and account header information. Total number of rewards is shown along with both a points and currency balance.

5. The user can then redeem a prize if they wish using the 'Redeem iZone Prize' function:



Note that if you have no prizes available or none that can be redeemed because qualifying criteria has not been met then a dialog stating “No prizes available” will be shown.

The items displayed to the user are returned from the Zonal Loyalty website and can be any of the following:

- Product @ zero price
- Product @ set price
- Product with discount assigned
- Product which requires points balance to redeem
- Discount (No conditions)
- Discount (Points required to redeem)
- Discount (Currency Balance required to spend)

In Aztec 3.5.8 and later, products will appear in green, normal discounts in red and currency discount in blue. These will also be grouped together to enable easier identification and selection by the user. There is also a “more” button available if the number of prizes available exceeds the available screen space. If using Aztec 3.5.6, then this grouping will not be present and the form will appear more unorganised.

**NOTE** – Customers must have registered their details against the loyalty card before redemptions are allowed at all. Customers will accrue points while the card is unregistered but cannot redeem any. On the balance check function, if a card isn’t registered there is text to indicate this to the POS user to advise the customer accordingly. Full registration is available on the website belonging to the site and requires mandatory contact information to be entered to complete the process. This is definable per client within Zonal Loyalty. “Lite Registration” is also available via the POS and is detailed below.

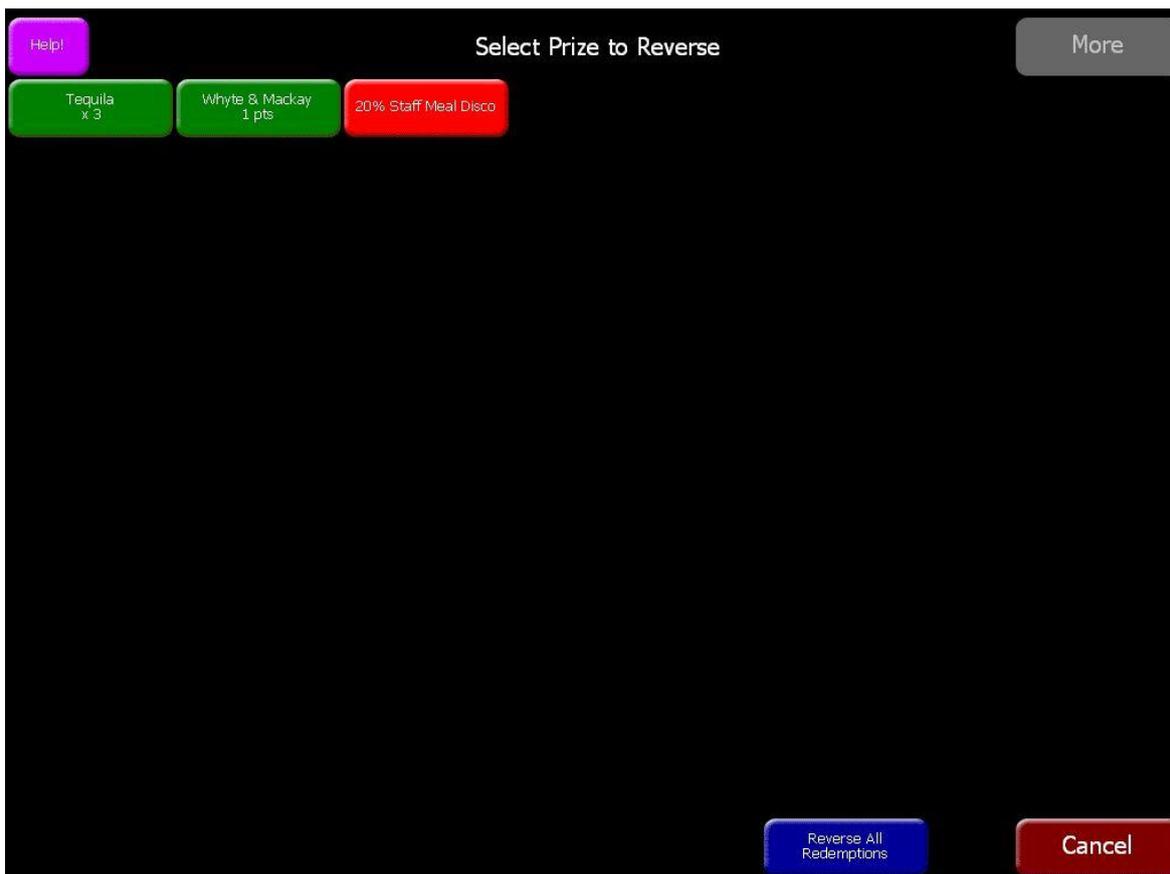
- If the user attempts to redeem a product which has >1 available, the redemption GUI will update the button to show how many of each product has been redeemed:



- If a discount is pressed, the redemption dialog will automatically exit, contact Zonal Loyalty and ring up all the products which were selected. If the user doesn't wish to use a discount, pressing the 'Finish' button on the redemption dialog will complete the operation.

**NOTE** – Products which are redeemed as prizes will always have their price overridden to a different value. They also must be available on the theme panel design so that they are included in the XML model sent to the terminals. This is not true of the discounts which do not need to be on the theme as all discounts used by Zonal Loyalty are sent in the XML model from 3.5.8 onwards.

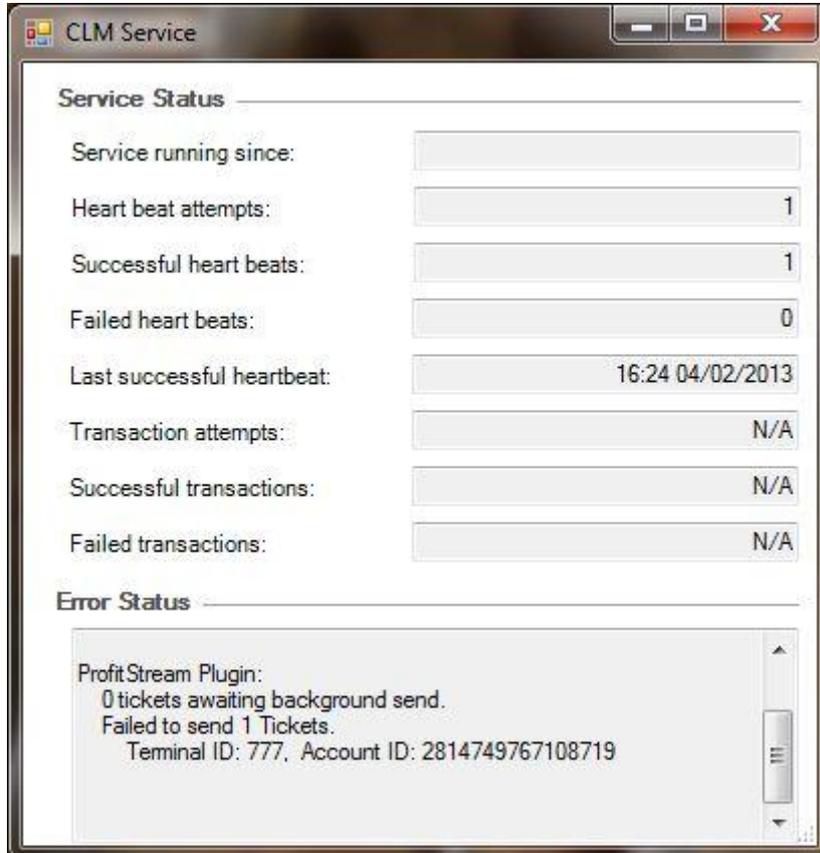
- If the user has made a mistake, they can correct off prize redemptions via the 'Cancel iZone Prizes' function:



This dialog will allow the user to correct redemptions individually, in multiples or cancel all the redemptions against the account. Once the user selects the prizes to reverse, the system will contact Zonal Loyalty to update the customer's account with the new prize levels. Note that if the discount is selected in this dialog, then the user still has to press the 'Reverse All Redemptions' button to complete the operation.

9. Once the user pays off the account in full, the POS will again contact Zonal Loyalty to update the customers info with any additional spend or information pertinent to the account activity.

**NOTE** – This action is performed asynchronously which means the POS does not wait for the response from Zonal Loyalty to close the account. The “Post Ticket” operation performed by the service in the BoH is retried 5 times if there is a failure and any failures are reported to the user via the service monitor:



If support need to resubmit a failed “Post Ticket” operation, then they need to manually edit a text file in the following location:

- %PROGRAMDATA%\ZONAL\CLM\PostTickets

The file is called ‘ProfitStreams\_PostTickets\_Failures.txt’ and will have entries in the following format:

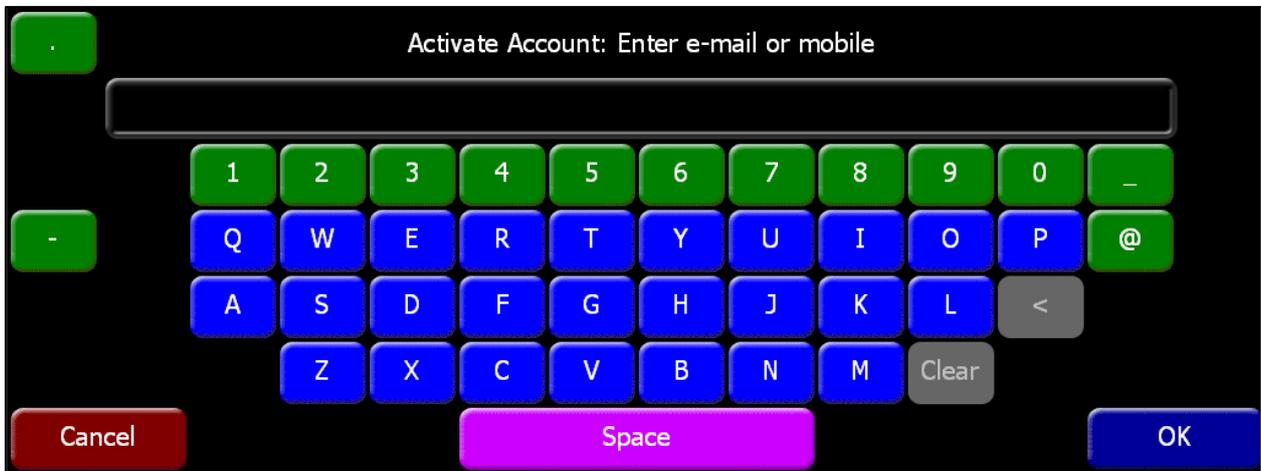
- {TerminalID},{AccountID},{RetryAttempts}

To resubmit the data, cut the desired line out of the failure file and paste it into the ‘ProfitStreams\_PostTickets.txt’ file in the same directory. Then, change the 5 to be a 0 and save the file. The CLM service will pick up this resubmission within a minute or two.

**NOTE** – Only accounts within the last 7 days can be resubmitted as they need to exist on the POS server. If an account was not submitted and 7 days have passed, then this account cannot be posted to Zonal Loyalty. In the latest version (1.3.0.46535, accounts older than 7 days are moved into a new “Expired” text file and will not be retried)

The final loyalty function which is currently available at the terminals is the 'Register iZone account' feature. The purpose of this feature is to provide enough details at POS to allow rewards to be redeemed.

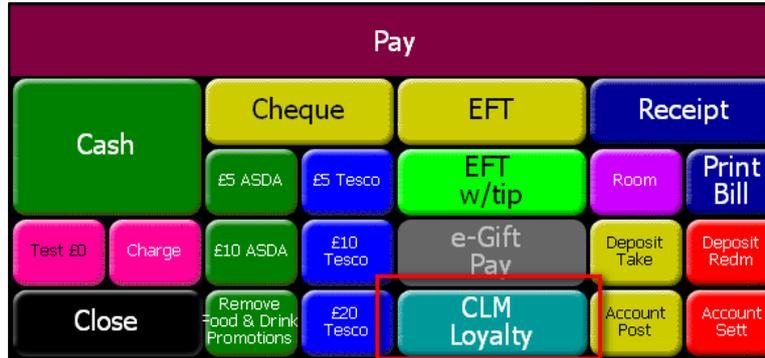
10. Press the 'Register iZone account' function when an unregistered card has been swiped against the account:



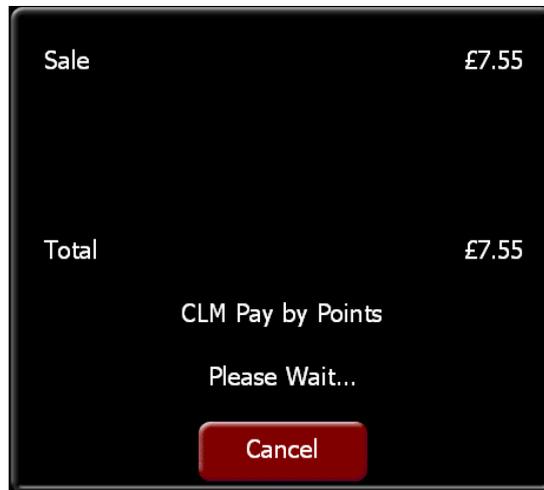
The user can then type in a mobile number or e-mail address which will then send details to Zonal Loyalty and either be approved or declined based on validity of entered information.

## Payments

If the user wishes to pay off the POS account via their loyalty balance, then this can be done using the CLM Loyalty payment method (If set up):



When the user presses this method it will show this dialog as it contacts Zonal Loyalty for authorisation:



Points or currency balance will be deducted in real time at the Zonal Loyalty end from the customer's account.

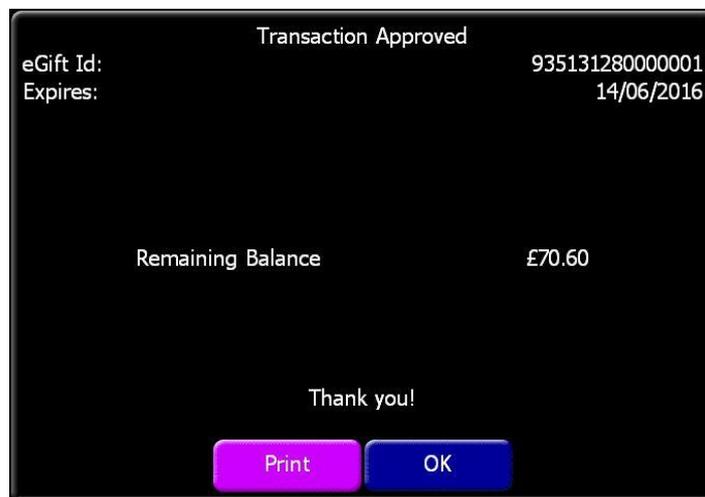
## e-Gift Functions

The e-Gift functionality is simpler in concept than loyalty in that no customer information is required to use the card. If a balance is available on the card it can be spent as cash and if no balance exists, then the card can be topped up.

1. At the POS, navigate to the panel which contains the e-Gift top up product and press it:

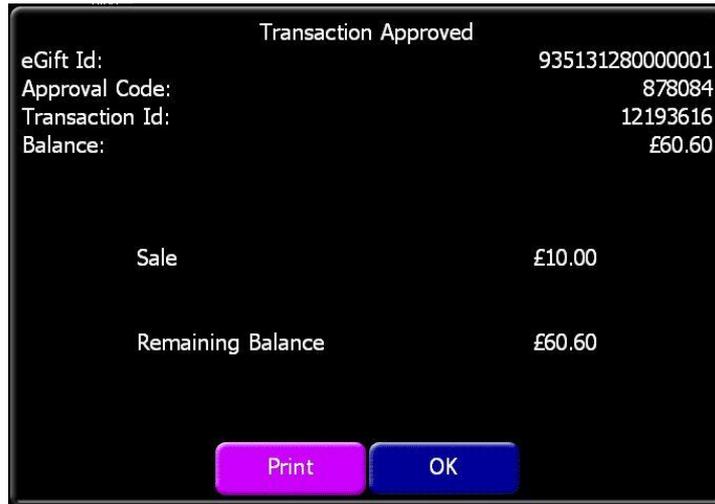


2. Enter the amount you wish to add to the card and press enter
3. User then needs to swipe/scan/enter the gift card to load the card with the value
4. Payment needs to then be made to close the account
5. Re-identify to the POS and select the 'e-Gift Balance Check' function and swipe/scan/enter the gift card:



6. Confirm this message and ring up some products against the account
7. Navigate to the pay panel and use the e-Gift payment method
8. Enter amount to make payment for and confirm

9. The user will be presented with the following screen when successful:



The e-Gift card can be retained by the customer should they wish to load more value onto it or it can be discarded when empty. No post ticket activity is sent to Zonal Loyalty as there is no customer to record the details against.

## Card Commerce Functions

The Card Commerce functionality is simpler in concept than loyalty in that no customer information is required to use the card. If a balance is available on the card it can be spent as cash and if no balance exists, then the card can be topped up.

1. At the POS, navigate to the panel which contains the Card Commerce top up (variable or fixed) product and press it:



2. Enter the amount you wish to add to the card and press enter
3. User then needs to swipe/scan/enter the gift card to load the card with the value
4. Payment needs to then be made to close the account
5. Re-identify to the POS and select the 'CC-Gift Balance Check' function and swipe/scan/enter the gift card:



6. Confirm this message and ring up some products against the account
7. Navigate to the pay panel and use the Card Commerce payment method
8. Enter amount to make payment for and confirm

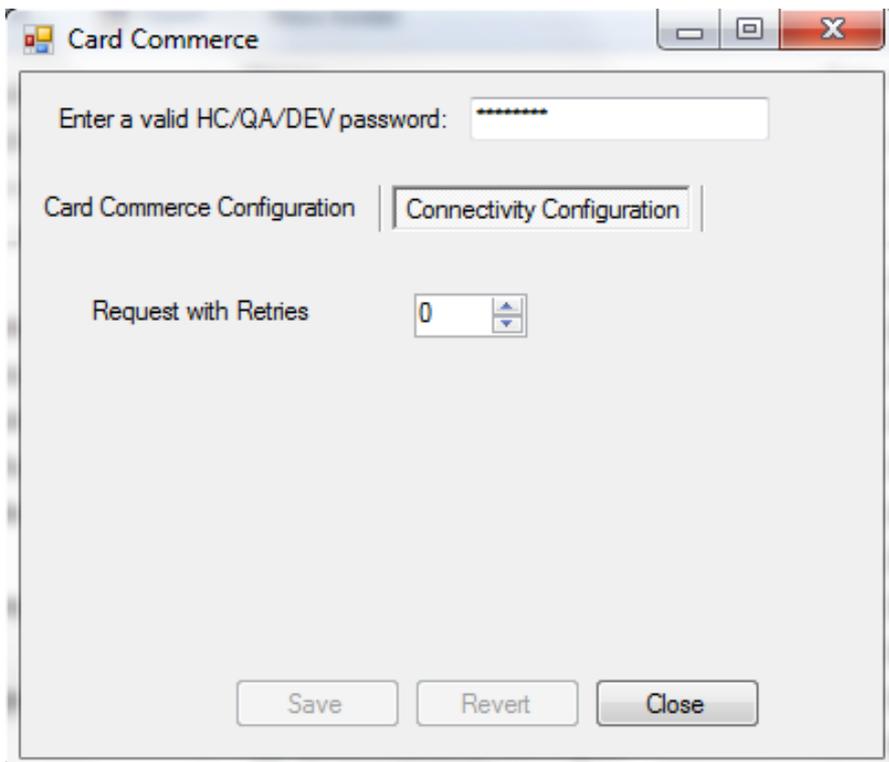
9. The user will be presented with the following screen when successful:



The Card Commerce card can be retained by the customer should they wish to load more value onto it or it can be discarded when empty.

### Configure Card Commerce Plugin to retry over unreliable network connections

On a site with unreliable network connections a new tab has been added to the Zonal.CLMPlugins.CardCommercePlugin.Configuration.exe utility. Enabling this option will cause failed communications to retry



Note: This option is on by default in Pos Integration 1.5.0+

Change “Request with retries” to = 1 and restart the service

## Card Commerce Voucher Discounts

The Card Commerce vouchering system can activate promotions by way of a trigger product. PoS user are able to add a discount to an account on an Aztec terminal as a result of using a Card Commerce voucher.

The BoH user will create the discounts to be triggered by the Card Commerce plugin.

There will be two new Theme buttons available in the Theme Designer;

- 1) “CC Apply Discount” - To prompt the FoH user to scan/swipe/key the CC voucher
- 2) “CC Cancel Discount” - To remove the discount from the account.

## Discount Setup

The process for creating Discounts in Theme Modelling has not changed. The only requirement is that the name of the discount must have the following format:

[discount name]#[coupon code]

NOTE

### Discount Validation Rules

- Discount redemption will fail if two or more discounts with the same Card commerce coupon code exist in the Aztec database.

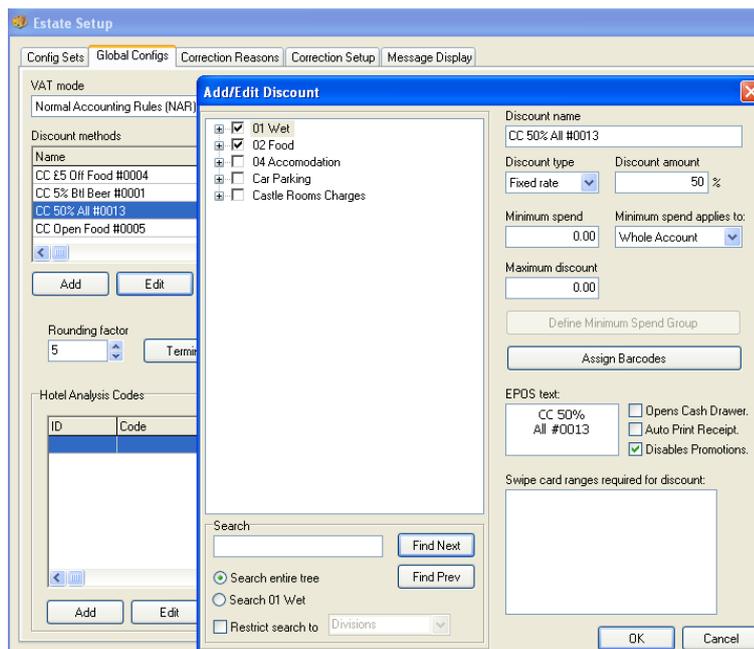
Where [coupon code] is a 4 digit number that matches a coupon code setup up on the Card Commerce server. The coupon code must be prefixed with ‘#’.

Examples:

‘CC 10% Food #0015’

‘CC £5 Off #0005’

‘50% Btl Beer #0015’



## EPOS - Applying a Fixed Amount/Percentage Discount

- 1) User selects "CC Apply Discount" and prompted to enter account number (Card Commerce card number)
- 2) The POS displays a screen indicating that the discount is available for selection i.e. the POS account contains products that are included in the configured discount.  
Selecting Cancel will abort the discount addition.

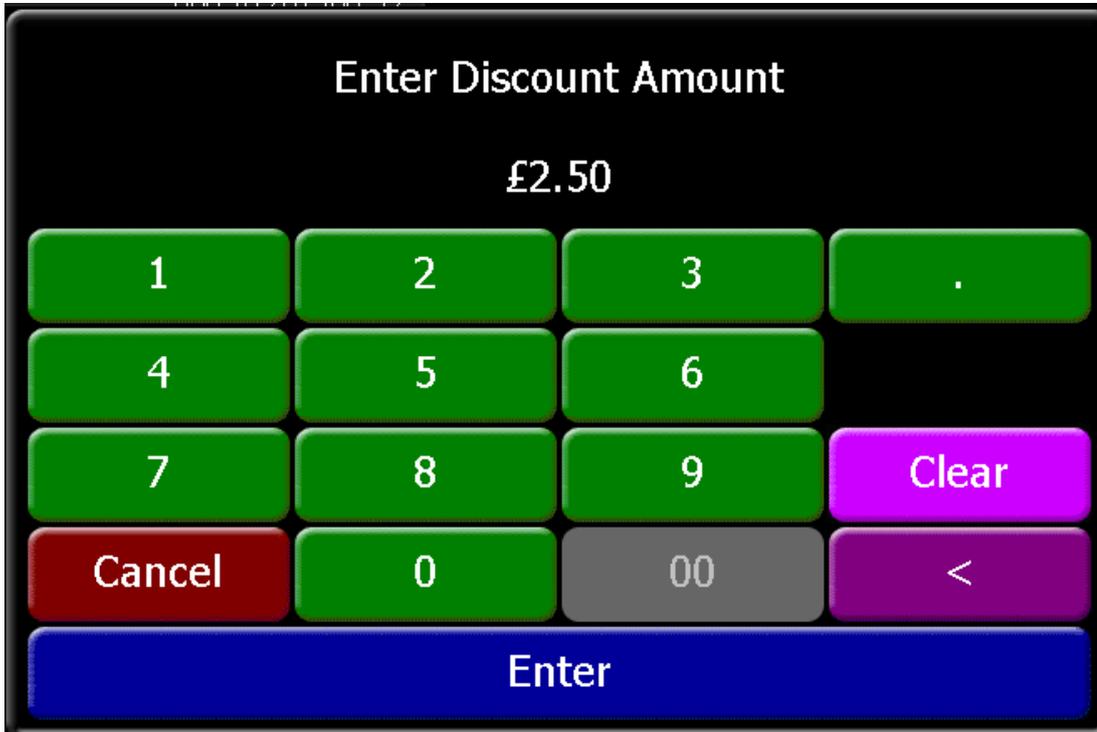


- 2.1) **OR** The POS displays a screen indicating that the discount is not available for selection i.e. the POS account does not contain any products that are included in the configured discount.
- 3) User selects the discount and the order display shows that the discount has been applied.

### EPoS - Applying an Open Amount Discount

At step 2 above, if the discount to be applied has been configured as an open amount discount the user will be prompted to enter a valid amount based on the discount settings.

Note that the amount in this screen is auto populated with the maximum discount amount. Selecting Cancel will abort the discount addition.



The screenshot shows a screen titled "Enter Discount Amount" with a black background. At the top, the amount "£2.50" is displayed in white. Below the amount is a numeric keypad with green buttons for digits 1-9, a red "Cancel" button, a green "0" button, a grey "00" button, a purple "Clear" button, and a purple "<" button. A blue "Enter" button is located at the bottom of the screen.

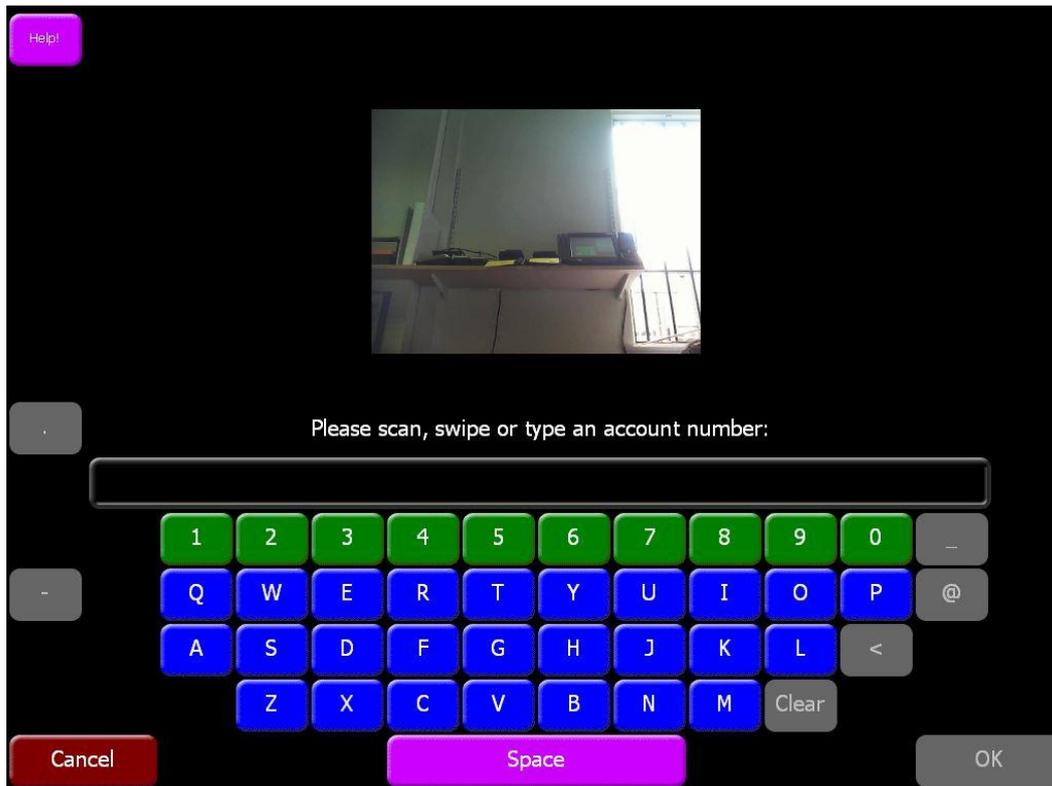
### EPoS - Removing a Discount

- 1) To remove a discount from an account the user selects "CC Cancel Discount".
- 2) They will be prompted with a list of all discounts that have been applied to the account. Each button in the list shows the discount and the amount of the discount applied.
- 3) If the selected discount is successful the discount will be removed from the order display.

## TXD Vouchering Functions

TXD vouchers are an additional way customers can redeem rewards at the terminal. These operate independently of the Zonal Loyalty functions so an account can contain both Zonal Loyalty prize redemptions and TXD voucher redemptions. Currently, vouchers can be used to ring up products at a zero value, apply a discount or make a payment against the account. They respect the Aztec configuration of the discounts or payment so can be applied to certain products / sub-categories / divisions etc. based on the customer's requirements.

1. To redeem a TXD voucher, authenticate to the terminal and press the 'Redeem TXD Voucher' function and enter the voucher code by any of the accepted methods:



Note that if applying a voucher for discount or payment, products must be rung up first. The vouchers are a one-time use code and cannot be used again once redeemed so if they are used "early" then they must be cancelled and either re-used or the newly issued voucher used (This depends on how TXD have set up the vouchering scheme).

For reference, for a voucher to ring up a product, the TXD setup must use the correct entity code from the Aztec **Products** table.

For a discount to be redeemed successfully, the TXD setup must use the correct discount ID from the **ThemeDiscount\_Repl** table in Aztec.

For a payment to be applied successfully, the TXD setup must use the correct payment method ID from the **ac\_Paymentmethod** table in Aztec.

If required, TXD voucher redemptions can be cancelled from the account using the 'Cancel All TXD Vouchers' function which will remove any and all TXD items from the account.

In this use case, TXD receive the cancellation request and will issue the customer with a new voucher code for the cancelled redemptions. Aztec is not responsible for issuing these codes as it will be controlled typically through TXD authored mobile phone applications.

Introduced in CLM 1.1.0.41390, TXD vouchers can now generate 'BounceBack' vouchers from the POS terminals. These are in the form of printouts which will give the user a new voucher to use after redeeming the first one. A typical printout may look like this:



In addition, the POS account ID and any Loyalty identifier tied to the account is now passed to TXD during a new 'Post Ticket' routine when an account is closed which has a TXD voucher redeemed against it.

Like the Zonal Loyalty post ticket routine, this is performed by the CLM service on the BoH PC and is asynchronous. However, unlike the Zonal Loyalty post ticket routine, if there is a failure, the service will continue to retry the post until successful while reporting the interim failure in the service monitor.

These TXD reversals are also stored in a text file in the %PROGRAMDATA%\ZONAL\CLM file structure.

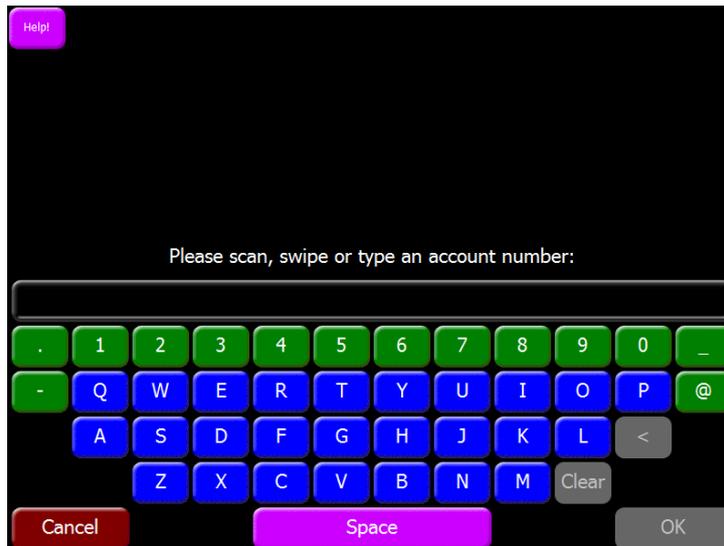
If you need to remove a persistently failing TXD post operation then this is achieved by manually editing the text file in the %PROGRAMDATA% structure similar to the CLM method.

## **Ceridian Functions**

### **Ceridian Balance Check**

The Ceridian balance check button can be added to the theme via theme modelling/themes, from the button picker select "other lists/iZone" and drag the Ceridian Balance check button to the theme.

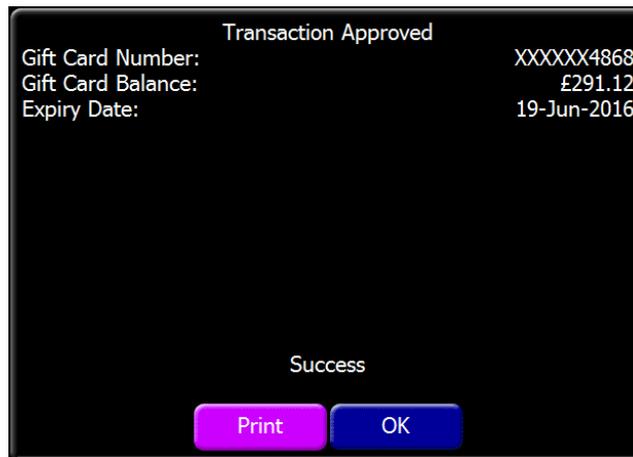
Once logged in clicking recently added Balance Button should prompt for card entry. At this point the card can wither be manually keyed, swiped, or the barcode scanned.



It should be noted that ‘Accepted Cards’ must match the card format provided in the CLM Prefix setup of the BoH configuration.

If the card number does not match the required the OK button will be greyed out and an attempt to proceed will show a notification of ‘Wrong type of CLM identifier’

When a valid number is supplied the user can proceed and will be displayed with a balance message



This balance screen will show the Last few didgits of the card number, the Current Balance, and Expiry date of the Gift card.

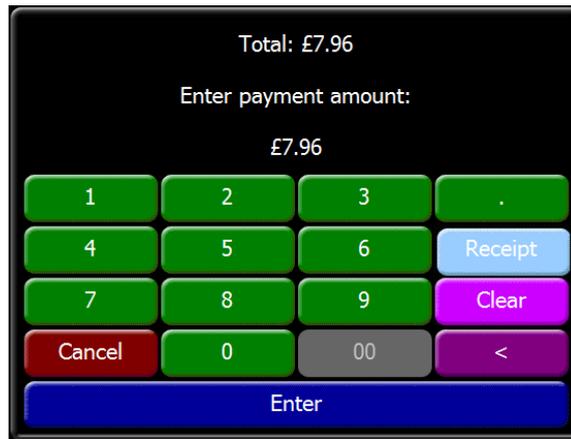
There is also an option to print a copy of this enquiry if desired. (Note: a balance slip will not automatically be printed)

### Ceridian Payment

Payment with a gift card follows a similar system to a balance enquiry. Once a few items have been run up on the Epos Account, the user can proceed with a payment using the Gift Card.

Clicking the payment button added to the system in BoH setup the user will be prompted to supply a card number. Again this must match the CLM Prefix provided.

Once supplied the user will be prompted to enter the desired amount to debit. This cannot exceed the current balance of the account.



Proceeding the engine will attempt to redeem the requested amount from the 3rd party of the provided gift card number.

If successful, the user will be presented with a success screen:



This screen will provided details of the transaction including the gift card number, the amount approved, the remaining balance and expiry date of the card.

### Ceridian Refund

Refund are processed and work in an identical manner to the above but with a negative balance.

### Errors

If errors occur during a transaction, this will be reported to the Epos user in a dialogue and the transaction will be considered a failure and have to be reprocessed from the beginning.

### Logs

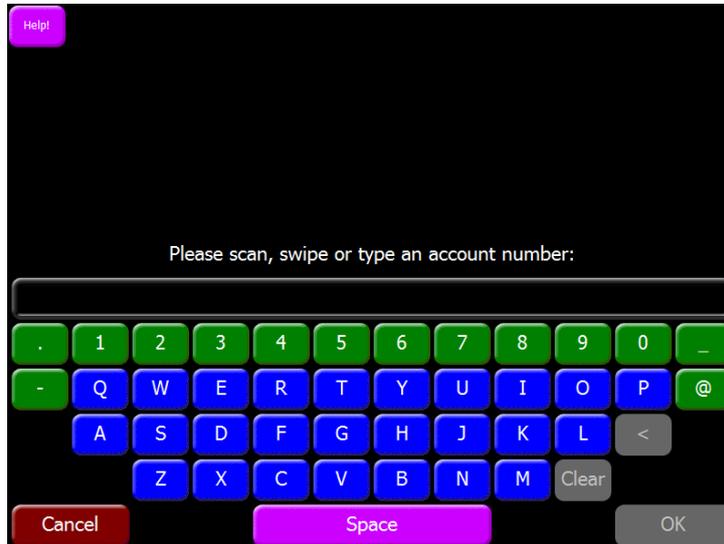
All transactions performed through the plugin should have complete logging in the standard Pos Integration Engine logs on the BoH PC.

### Corby and Fellas Functions

### Corby and Fellas Balance Check

The Corby and Fellas plugin uses the “e-Gift Balance Check” button, this can be added to the theme via theme modelling/themes, from the button picker select “other lists/iZone” and drag the “e-Gift Balance Check” button to the theme.

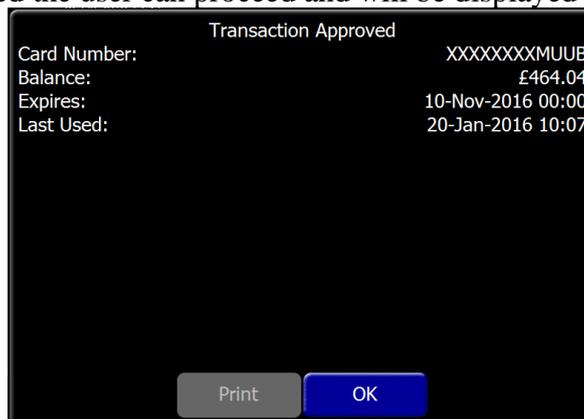
Once logged in, clicking the recently added “e-Gift Balance Check” should prompt for card entry. At this point the card can either be manually keyed, swiped, or the barcode scanned.



It should be noted that ‘Accepted Cards’ must match the card format provided in the CLM Prefix setup of the BOH configuration.

If the card number does not match the required card format the OK button will be greyed out and an attempt to proceed will show a notification of ‘Wrong type of CLM identifier’

When a valid number is supplied the user can proceed and will be displayed with a balance message:



This balance screen will show the last four digits of the card number, the current balance, the expiry date of the gift card and the date it was last used.

There is also an option to print a copy of this enquiry if desired. (Note: a balance slip will not automatically be printed.)

**Corby and Fellas Payment**

Payment with a gift card follows a similar system to a balance enquiry. Once a few items have been run up on the EPOS account, the user can proceed with a payment using the gift card.

On clicking the payment button added to the system in BOH setup, the user will be prompted to supply a card number. Again this must match the CLM prefix provided.

Once supplied the user will be prompted to enter the desired amount to debit. This cannot exceed the current balance of the account or the current balance on the gift card.



Proceeding the engine will attempt to redeem the requested amount from the 3rd party of the provided gift card number.

If successful, the user will be presented with a success screen:



This screen will provide details of the transaction including the gift card number, the amount approved, the remaining balance and a unique transaction reference.

**Corby and Fellas Refund**

Refund are processed and work in an identical manner to the above but with a negative balance.

**Errors**

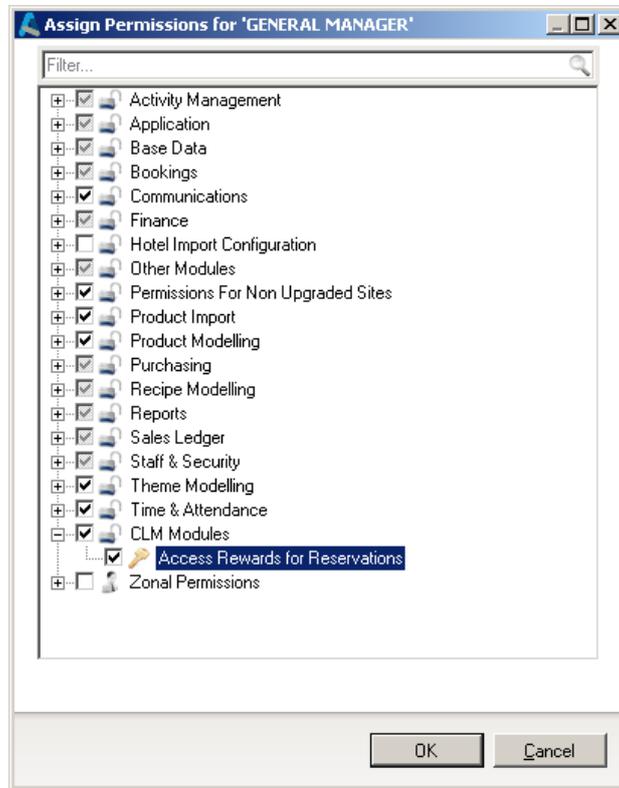
If errors occur during a transaction, this will be reported to the EPOS user in a dialogue and the transaction will be considered a failure and have to be reprocessed from the beginning.

**Logs**

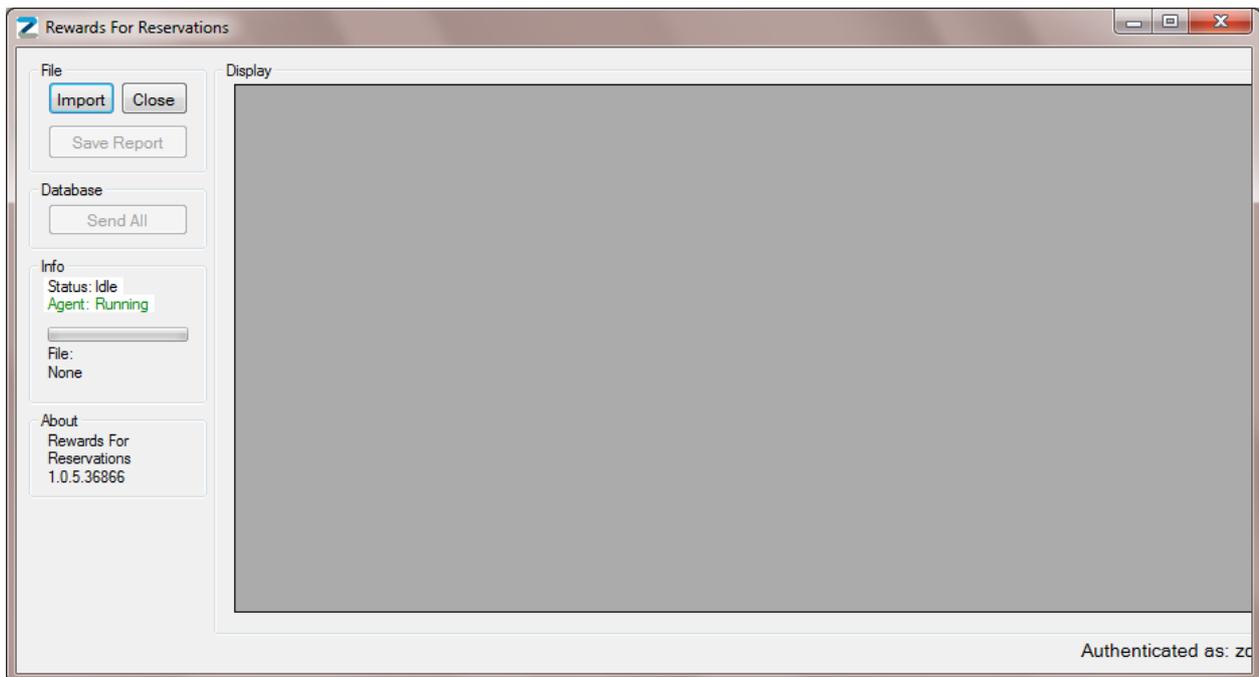
All transactions performed through the plugin should have complete logging in the standard Pos Integration Engine logs on the BOH PC.

## Rewards for Reservations

The Rewards for Reservations application allows the site manager to add cash balances to customer's loyalty accounts. This application appears on the Aztec shell, assuming the user logged in has access permissions within their role in Staff & Security:



1. Authenticate to the Aztec shell at site and launch the Rewards for Reservations application:



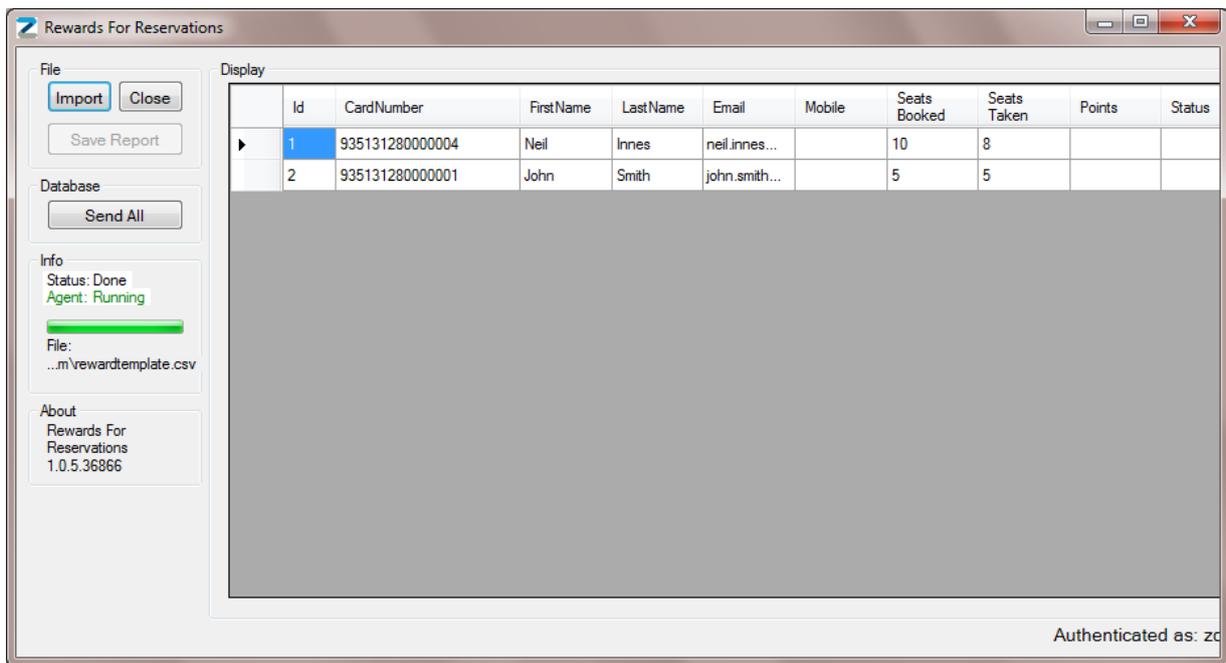
- Once the app has launched, the user needs to import a file. The application will accept .XLSX, .XLS and .CSV files assuming that they're in the correct format. There are template files for each format deployed with the CLM installation and these are located in C:\Program Files\Zonal\CLM on site which the user should update with the details to be uploaded. An example CSV file is embedded below. Please note that when opening the file, the application will always default to the root of C:\:



InputFile.csv

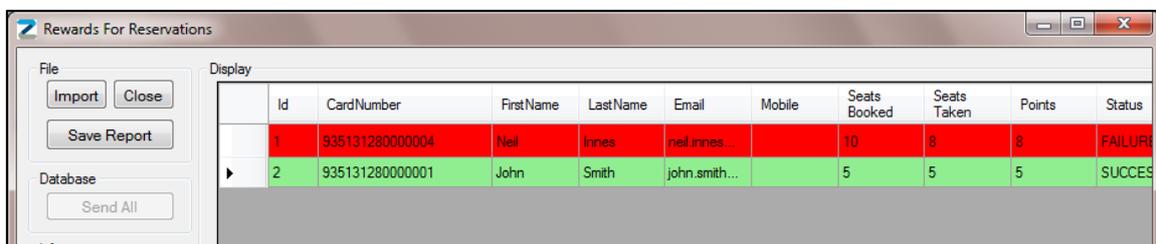
**NOTE** – Due to the location that the templates are copied to, it is recommended that support make a copy of the templates in a folder that the site PC users will have access to (e.g. C:\Temp).

- Once the file has been imported, the user is shown the imported details:

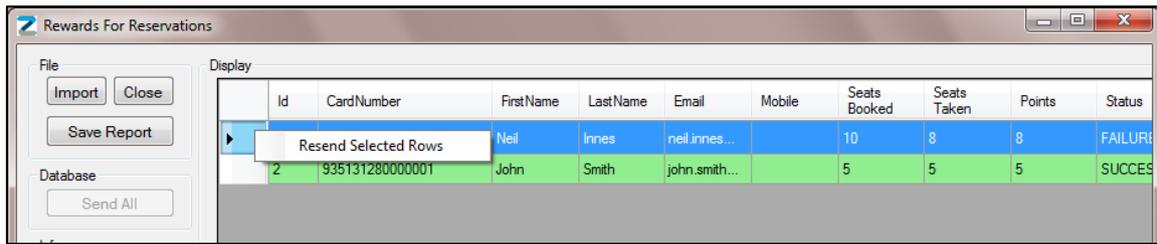


These details can be edited within the form itself if the information isn't completely accurate.

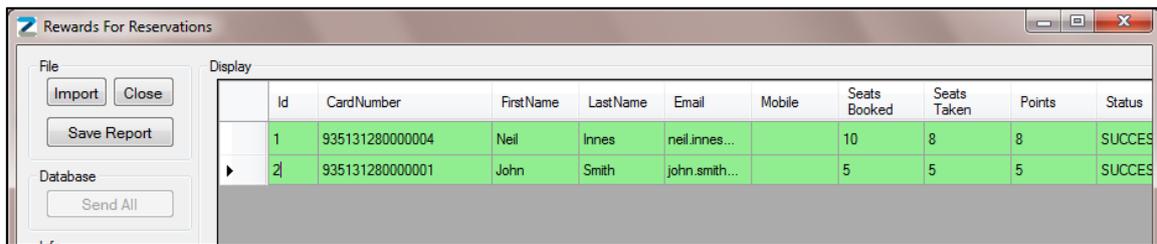
- Once the user has verified the information to be sent is correct (Any edits must be done in the template file and reimported), they click 'Send All':



If a record cannot be sent, it is marked as a failure and the rest of the rows will be tried. At this point, the “Send all” function will no longer be active but the user can select a row, right click and resend the information once edited:



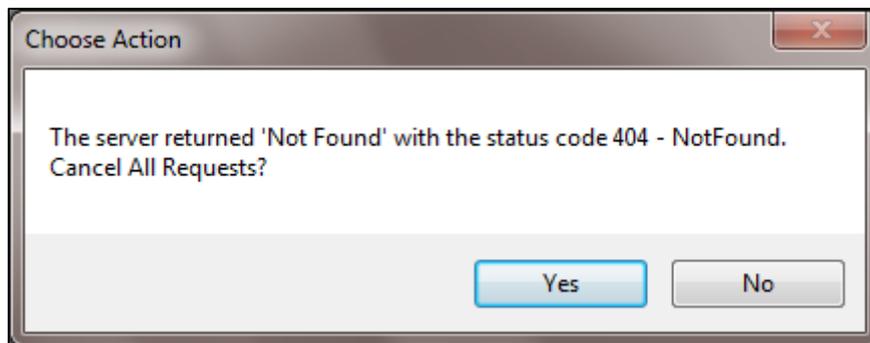
If the updated data passes, the row will be shown as a success:



If the user wishes, they can save a copy of the submission report which saves the submitted details to a standard XLS file.

Please note that there is currently no way of reversing any mistakes made through the tool. For example, if a customer was sent too many points then the site will need to contact Zonal support to request to have this manually edited in the Zonal Loyalty database.

Any error messages are reported to the user in a splash screen:



Again, the errors returned will be standard HTTP response codes which can be interpreted literally – a 404 message will mean that the card number is not found for example. Another common error may be a 400 error (Bad syntax – will usually have) or 500 error (Server response error). 401 errors could be generated if the internet traffic is routed through a proxy and the username/password combination is rejected by the proxy server.

There is also a log file available in the %ProgramData%\Zonal location for investigation purposes. On Windows 7, this location is **C:\PROGRAMDATA\Zonal** and on Windows XP, this location is **C:\Documents and Settings\All Users\Application Data\Zonal**

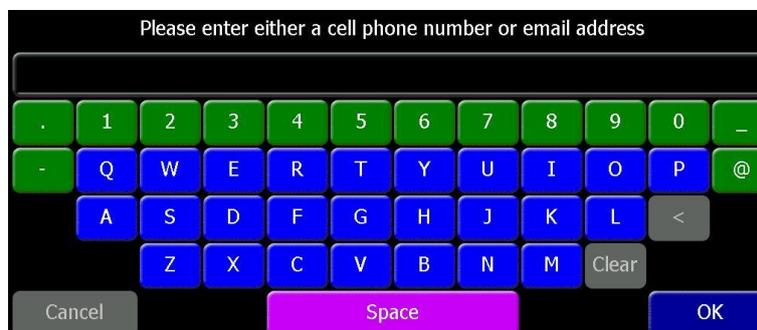
## US Loyalty Functions

The US Loyalty Plugin for the CLM Engine is currently only a points-based loyalty scheme. This will allow customers to redeem points either against prizes or a monetary value equivalent. Prizes must be setup in Aztec as the entity code of the product will be used as the “RewardID” on Sticky Street allowing the prizes to be redeemed at the POS. Also note that the prize product in Aztec must have a barcode assigned and “Send All Barcoded Products” enabled in estate configuration.

The configuration of these campaigns can be done via a web based interface on the Sticky Street (<https://clienttoolbox.com/>) / Moe Genius ([http://www.moegenius.com/users/sign\\_in](http://www.moegenius.com/users/sign_in)) website.

### Card Registration

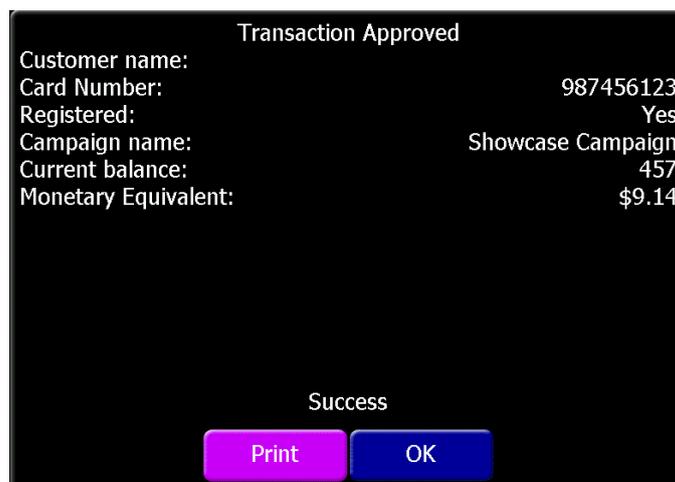
When a new card is issued to a customer, this can be registered at the POS. Only a valid cell phone number or email address has to be entered after the card has been swiped or manually entered on the POS.



Once completed, the newly registered card will be assigned to the current open account and the customer can instantly start gathering points.

### Balance Enquiry

POS users can check the currently balance of a customer’s card by pressing “CLM Balance Check” this will display the below information.



A record of this can be printed and will produce the below output:



## Redemptions

On the Prize Redemption screen there are two types of rewards; Monetary and Products. All available prizes will be displayed; prizes which can be redeemed using the current loyalty account will be in blue (see screenshot below). These can be selected multiple times until the account no longer has enough credit to redeem further prizes. A number in the top right of the prize will increase each time the prize is reselected.

Monetary amounts can be selected from this screen; the button will show the total monetary value that the customer currently has. When pressed the POS user will only be able to select the total value of the current value avoiding the balance to become negative.



## Cancel Prize

Prizes can be removed from the current bill by pressing “Cancel CLM Prize” this will display all prizes and monetary amounts that have been redeemed against the bill (see below screenshot). Prizes are removed by pressing the prizes and confirming by using ‘Reverse Selected Redemptions’. If the prize has been redeemed multiple times the number in the top right will increase until the button is no longer selectable. The cancelation of a monetary works in the same way, once pressed the full amount of the value will be removed from the bill.



## Staff Messaging Functions

### Overview

Staff Messaging introduction allows the ability to communicate directly with pubs via the EPOS terminal when the user logs in at the start of their shift. It must be possible for messages to be sent from Head Office or by the pub manager on the BoH pc, and for terminal users to acknowledge that they have read each message.

The majority of Staff Messaging configuration is contained within the staff and security module at head office and site.

For more information, please see the Aztec 3.6.0 new features guide [here](#)

## LiveRes Connect

### EPoS Functionality

The current release of LiveRES connect utilises the current Aztec booking module and monitors the information audited to the back of house database to generate the information to synchronise the booking with LiveRES. From a till user perspective this has not changed.

When adding a booking on the POS use the normal button configured for this action. Certain information must now be entered in the correct format:

- A customer name must always be entered.
- Time must be entered in 24-hour format. For example, 07:00, 12:00, 13:00, 19:00.
  - Note: Bookings without a time will be rejected.
- Dates must be entered in the format dd/mm/yy. For example, 21/05/18, 25/12/17.
  - Note: Bookings without a date will be rejected.
- Covers must be entered.
  - Note: Do not enter the full cover counts of bookings for function suites unless they take up capacity in the restaurant. As this would reduce the capacity incorrectly.
  - Note: Bookings without covers entered will be rejected.
- Phone number must be entered
  - Note: Bookings without a phone number will be rejected.
- A Booking Reference may be entered but is not required.

When adding a deposit to a booking on the POS use the normal button configured for this action. Find the booking as normal and add the deposit.

Forfeit and redemption of a deposit also continues to work as previously.

## Errors

### Logs

All actions performed by the LiveRES connect plugin are logged to the standard Pos Integration Engine logs on the back-office PC in C:\Program files\Zonal\Aztec\Log.

If debug level logging is enable within the Pos Integration engine then further information can be obtained about the calls made to LiveRES, the till and any responses.

## Database

On Aztec version before 3.10.0 the LiveRES connect plugin will update site databases with the following information when it is selected to be installed:

- Database Tables
  - ThemeEFTRule
  - ThemeCLMAccount
  - Ac\_CLMPlugins
  - Ac\_CLMPluginSettings
- Database Views:
  - Ac\_ClmBooking
  - Ac\_ClmBookingDeposit
  - Ac\_ClmBookingRedemption
- Database Function
  - Ac\_fnClmGetChangedBookings

## Support Files & Information

This section is to detail where users can find logs & support information and to detail some of the more likely error conditions that may arise from usage of the system.

### General Information

All updates performed by the Zonal Loyalty functions on the POS occur in real time. Customers balances, prizes, rewards and details are updated either when the function is called or at the end of the transaction for the final posting of details.

The prize redemptions (Discounts, products and payments) are treated as normal products, discounts and payments so features such as stocks are unaffected by the changes.

The Zonal Loyalty plugin utilises the Aztec registry key to make a connection to the DB to retrieve terminal ID's and product data etc.

### Installation Information

When installing non-interactively, the following command line options are available:

- Install package example (/i - default):

```
Zonal_CLM_Setup.exe /i /s /v"/qn /L*v "log.log" ADDLOCAL="Engine,ProfitStreams_Plugin"
```

- Uninstall package example (/x):

```
Zonal_CLM_Setup.exe /x /s /v"/qn /L*v "log2.log" REMOVE="ALL"
```

You can also use REINSTALL="{Feature Names}" for reinstalling/repairing.

*Feature names:*

- *ALL*
- *Engine*
- *ProfitStreams\_Plugin*
- *ProfitStreams\_RFR*

- *TXD\_Plugin*
- *MoeGenius\_Plugin* (US loyalty)
- *CardCommerce\_Plugin*
- *StaffMessaging\_Plugin*
- *Ceridian\_Plugin*
- *CorbyFellas\_Plugin*
- *HLS\_Plugin*
- *LiveResConnect\_Plugin*

If further information is required on command line installations, information can be found here:  
<http://kb.flexerasoftware.com/selfservice/viewContent.do?externalId=Q104807>

## Database Schema

The development has introduced several new tables into the Aztec schema to store the setup information. Table definition is as follows:

**ac\_ClmCardPrefix** (Stores the prefixes entered in Base data with their attributes)

**Columns:**

1. <i>Id</i>	<i>int</i>	<i>NOT NULL</i>
2. <i>Prefix</i>	<i>varchar (20)</i>	<i>NOT NULL</i>
3. <i>MinLength</i>	<i>int</i>	<i>NOT NULL</i>
4. <i>MaxLength</i>	<i>int</i>	<i>NOT NULL</i>
5. <i>ClmAccountld</i>	<i>smallint</i>	<i>NOT NULL</i>
6. <i>IsException</i>	<i>bit</i>	<i>NOT NULL ((0))</i>

**ac\_ClmCardPrefixGroup** (Top level prefix groups – the ‘disabled’ group is default data)

**Columns:**

1. <i>Id</i>	<i>int</i>	<i>NOT NULL</i>
2. <i>Name</i>	<i>varchar (200)</i>	<i>NOT NULL</i>

**ac\_ClmCardPrefixGroupItem** (Links the prefix groups to the prefixes)

**Columns:**

1. <i>ClmGroupld</i>	<i>int</i>	<i>NOT NULL</i>
2. <i>ClmPrefixld</i>	<i>int</i>	<i>NOT NULL</i>

**ac\_EstateStructureClmSettings** (Holds the setup data for which prefix groups are assigned where)

**Columns:**

1. <i>Id</i>	<i>int</i>	<i>NOT NULL</i>
2. <i>ClmPrefixGroupld</i>	<i>int</i>	
3. <i>EstateLevel</i>	<i>tinyint</i>	<i>NOT NULL</i>
4. <i>Estateld</i>	<i>int</i>	
5. <i>Companyld</i>	<i>int</i>	
6. <i>Areald</i>	<i>int</i>	
7. <i>Siteld</i>	<i>int</i>	
8. <i>SalesAreald</i>	<i>int</i>	

**ac\_ClmSiteDiscount** (Holds which discount ID’s are available at each site)

**Columns:**

1. <i>Id</i>	<i>int</i>	<i>NOT NULL</i>
2. <i>Siteld</i>	<i>int</i>	<i>NOT NULL</i>
3. <i>Discountld</i>	<i>bigint</i>	<i>NOT NULL</i>

**ac\_ClmSiteDiscountSpecific** (Holds which discount ID’s are used for currency, external amount and external rate discounts rung up from P\$)

**Columns:**

1. <i>Siteld</i>	<i>int</i>	<i>NOT NULL</i>
2. <i>CurrencyDiscountld</i>	<i>bigint</i>	
3. <i>ExternalAmountDiscountld</i>	<i>bigint</i>	
4. <i>ExternalRateDiscountld</i>	<i>bigint</i>	

**LoyaltyAccountAssigned** (Holds the details of when loyalty cards have been assigned against an account)

**Columns:**

1. <i>TransactionID</i>	<i>bigint</i>	<i>NOT NULL</i>
2. <i>date</i>	<i>datetime</i>	<i>NOT NULL</i>
3. <i>TerminalID</i>	<i>int</i>	<i>NOT NULL</i>
4. <i>EmployeeID</i>	<i>bigint</i>	<i>NOT NULL</i>
5. <i>AccountID</i>	<i>bigint</i>	<i>NOT NULL</i>
6. <i>Transaction Number</i>	<i>int</i>	
7. <i>LoyaltyAccount</i>	<i>varchar (40)</i>	<i>NOT NULL</i>
8. <i>LMDT</i>	<i>datetime</i>	
9. <i>Authoriser</i>	<i>bigint</i>	



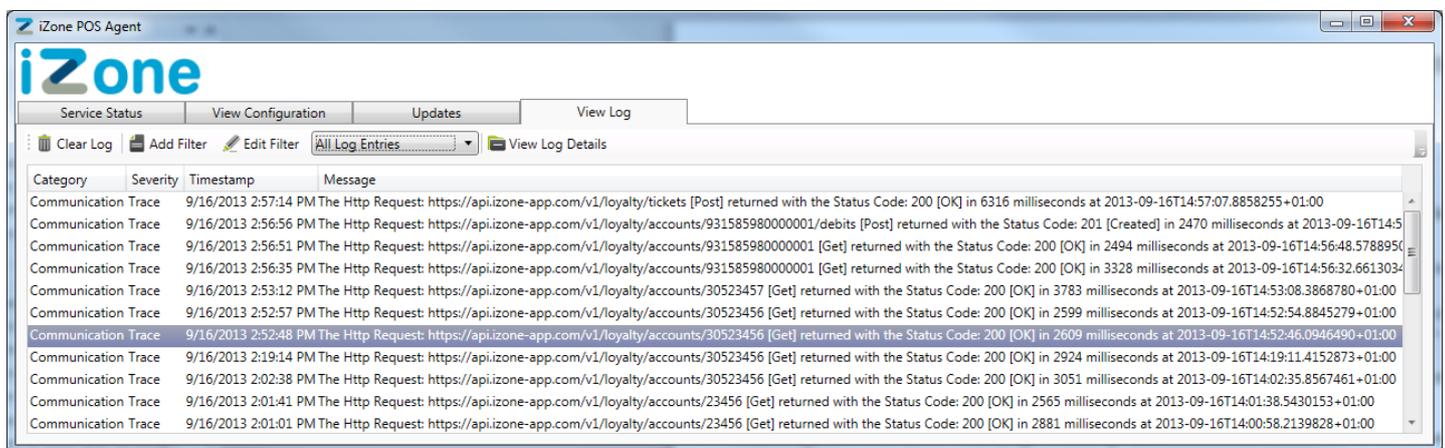
## Log Files

The Zonal CLM service will write its log file to the standard Aztec log folder (C:\Program Files\Zonal\Aztec\Log). A typical log message from this file is as follows:

```
007 08/02/12 15:19:59.477 Gen: CLM Request: TerminalID 323; AccountGUIDO 2814749767107409;
SequenceNumber 8; EmployeeID 700001000002; MessageType ServiceRequest; OperationType
CheckLoyaltyBalance
100 08/02/12 15:20:00.118 Gen: CLM Response: TerminalID 323; AccountGUIDO 2814749767107409;
SequenceNumber 8; EmployeeID 700001000002; MessageType ; OperationType ; ResponseCode; 1,
Message; Thank you!.
```

This log will show information on the terminal the request originated, the employee who requested the action and any messages passed by our CLM engine back to the POS.

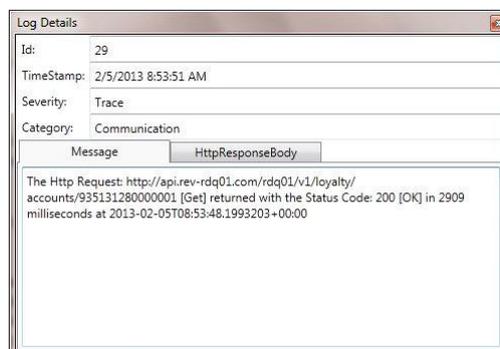
The iZone agent software and service also logs the messages passed to and received from Zonal Loyalty. These messages can be seen in the agent software in the “View Log” tab:



When Pos Integration is first installed (pre-1.3.0.46535), the log messages shown in the console will only be of “error” level. This can be manually changed in the ‘service.config’ file which is found in the %PROGRAMDATA%\ZonalCLM\Configuration location.

You need to change the ‘severity’ level on the ‘databaseLoggers’ element to “Trace” from its default of “Info”. The Zonal CLM service and the iZone Agent application both need to be restarted to see these changes.

When messages are being logged in a compact database which is stored in the %PROGRAMDATA%\ZonalCLM\Data folder and shown by the console (Last 500 messages are shown, if you double-click on a message then you will see the following Trace dialog box:



This allows you to see the response XML from a call to Pos Integration and in some cases, also the request XML which was sent. This allows the user to diagnose missing data / reward levels / balances etc. at a low level rather if issues are being reported from the POS.

## Example Loyalty Post Ticket

Below is an example of a post ticket which is sent to Zonal Loyalty. This details the following:

- Loyalty account ID
- Divisional Spend split
- Employee who paid account off and date/time
- Payment details
- Products sold within the POS account
- Overall account total

```
<ticket xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema" id="2814749800001664_1">
<deliveryType>dinein</deliveryType>
<divisions>
  <divisionid="1"><amount>2.65</amount><description>Wet</description></division>
  <divisionid="2"><amount>6.95</amount><description>Food</description></division>
</divisions>
<employees>
  <employee id="700001000002" />
</employees>
<createdOn>2014-01-24T10:41:29Z</createdOn>
<updatedOn>2014-01-24T13:39:50Z</updatedOn>
<loyaltyAccountId>931585980000001</loyaltyAccountId>
<receipts>
  <receipt id="23669128560023941">
    <amount>9.6</amount>
    <payments>
      <cashPayment id="23669128560023940"><amount>9.6</amount>
      <currency>GBP</currency>
      <receiptId>77/0018</receiptId>
    </cashPayment>
    </payments>
    <ticketId>2814749800001664_1</ticketId>
  </receipt>
</receipts>
<status>closed</status>
<subtotal>9.6</subtotal>
<tax>0</tax>
<ticketItems>
  <ticketItem id="23669128560023930">
    <informational>false</informational>
    <longDescription>Guinness (Pint)</longDescription>
    <menuItemId>10000000412</menuItemId>
    <name>Guinness</name>
    <price>2.65</price>
    <quantity>1</quantity>
    <shortDescription>Guinness</shortDescription>
    <subtotal>2.65</subtotal>
    <tax>0</tax>
  </ticketItem>
  <ticketItem id="23669128560023934">
    <informational>false</informational>
    <longDescription>Steak Burger (Main course)</longDescription>
    <menuItemId>10000002247</menuItemId>
    <name>Steak Burger</name>
    <price>6.95</price>
  </ticketItem>
</ticketItems>
```

```
<quantity>1</quantity>
<shortDescription>Steak Burger</shortDescription>
<subtotal>6.95</subtotal>
<tax>0</tax>
</ticketItem>

<ticketItem id="23669128560023936">
<informational>>false</informational>
<longDescription>With Cheese</longDescription>
<menuItemId>10000000399</menuItemId>
<name>With Cheese</name>
<price>0</price>
<quantity>1</quantity>
<shortDescription>With Cheese</shortDescription>
<subtotal>0</subtotal>
<tax>0</tax>
</ticketItem>

<ticketItem id="23669128560023938">
<informational>>false</informational>
<longDescription>Bt Bud</longDescription>
<menuItemId>10000000011</menuItemId>
<name>Bt Bud</name>
<price>0</price>
<quantity>1</quantity>
<shortDescription>Bt Bud</shortDescription>
<subtotal>0</subtotal>
<tax>0</tax>
</ticketItem>
</ticketItems>

<total>9.6</total></ticket>
```

---

## Manipulation of card numbers in Loyalty plugin

There is the ability within the POS Integration engine for the Zonal Loyalty plugin, to manipulate the card numbers sent to the online Zonal Loyalty platform. This is intended for estates where they have existing short loyalty card ID's (Say 5 digits) and then migrate to Zonal Loyalty. The functionality allows the user to add prefixes to the cards based on prefix and length and is configured in the "Configuration.XML" file held in the following location:

- %Program Files%\Zonal\CLM

The rules for adding prefixes are as follows:

Prefix Rules Formatting Any number of entries are allowed providing they are numbered consecutively and start at PrefixRules1 Format is A:B+C where A is the prefix on the card to look for, B is the length of the card number and C is the prefix to add e.g. To add a '305' to all five digit cards you will need the following entry –

```
<SectionItem key="PrefixRules1" value=":5+305" />
```

Alternatively, to take all cards starting 3456 which are between 14 and 16 characters long and add the prefix '12' you will need to add –

```
<SectionItem key="PrefixRules1" value="3456:14+12" />
```

```
<SectionItem key="PrefixRules2" value="3456:15+12" />
```

```
<SectionItem key="PrefixRules3" value="3456:16+12" />
```

## Error Conditions at the POS

### General Zonal Loyalty Errors

**NOTE** - Please note there is currently no support for terminals operating in standalone mode and working with Pos Integration.

If the Zonal CLM service is not running or responding, then after a timeout period this dialog will be shown:



If the CLM agent service is not running or responding, then this dialog will be shown at the POS:



If the token or the password in the agent is incorrect, then this dialog will be shown at the POS:



If the card number swiped exists in the Aztec database but is not present in the Zonal Loyalty database then this dialog will be shown:



If the internet is not available or no response is received from Zonal Loyalty within 60 seconds then this dialog will be shown:



If the internet connection is being routed through a proxy and the login credentials aren't correct then the user will see this dialog at the POS:



If you're performing a 'lite registration' and the e-mail address entered has already been used, then the user will see this dialog at the POS:



If you're performing a 'lite registration' and the phone number entered has already been used, then the user will see this dialog at the POS:



## e-Gift Errors

If the e-Gift card being used has no available balance and the user attempts to make a payment, then this dialog is shown:



## TXD Errors

If the TXD plugin has not been installed and the CLM engine service is running, this dialog will be shown:



If the TXD server cannot be contacted, then this dialog will be shown:



If the voucher being used by the customer has already been used, this dialog will be shown:



If the voucher being presented is accepted by our POS but rejected by TXD, this dialog is shown:



If the product being returned from TXD does not match a product GUIDO in the theme, this dialog will be shown:



If the discount being returned from TXD does not match a discount ID in the theme, this dialog will be shown:



If the voucher presented is accepted by the POS and valid with TXD but cannot be found in their database, this dialog is shown:



*(This message also appears currently for vouchers that have passed their expiration date)*

## Card Commerce Errors



Search the CLM log ( Zonal.CLMEngine.WindowsService.exe\_[Date]\_[Time] ) for the line:

**Gen: Unable to load all redeemed coupons cache from: redeemed\_coupon\_cache**

If you find this line in the log the workaround is to perform the following steps

1. Navigate to C:\Windows\System32 and delete/rename the 'redeemed\_coupon\_cache' file.'
2. Restart the CLM Service.
3. Retry your CC transaction.

This is a manifestation of bug 361975 which is fixed in 1.11.0. Sites experiencing this error are recommended to upgrade.



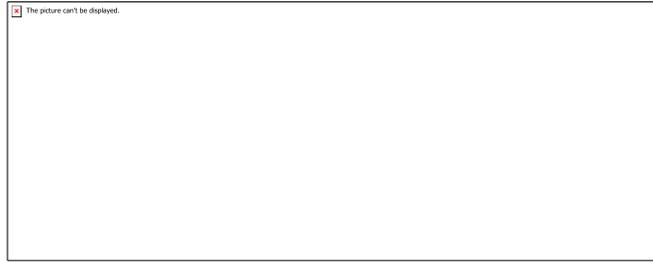
*(This means the till cannot contact the Pos Integration service on the PC.)*

Ensure URL connects in IE, if you see the below it means the site/VPN has not been white listed with card commerce

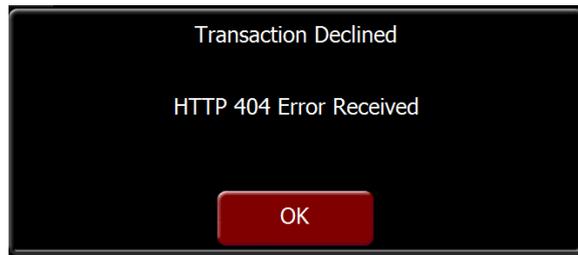


If this returns ok and ZonalCLMService is running then means access between till and service could be blocked on a network/port level – IT issue

If the above confirm ok or the ZonalCLMService service is not running on the PC– Zonal Issue



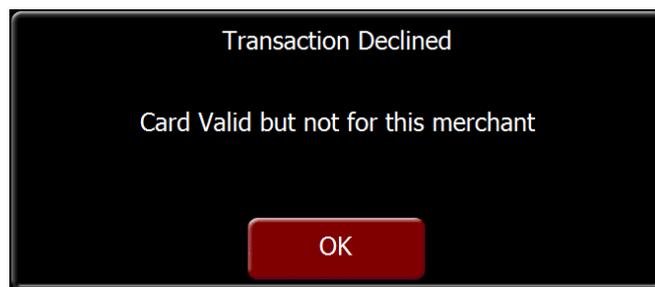
URL blocked at a network level – IT issue.  
*(Similar to Macebearer trial site was seen to be intermittent)*



*Plugin not installed / can't connect to internet*



*Encryption Key is incorrect – setup issue*



*Card belongs to another merchant*

"Object not set to an instance of an object"  
*Incorrect button (Balance or Payment) on theme*

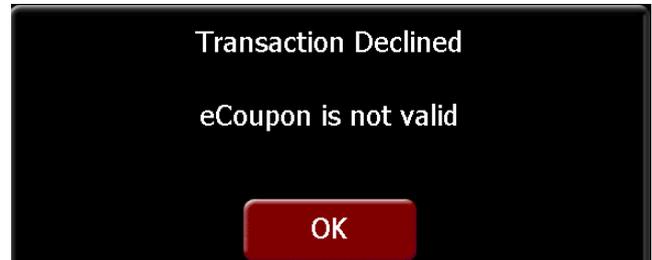
"Not a valid CLM identifier"  
*Card number attempted is not configured at HO*

Behavioural

*You cannot void a product after a CC payment has been reversed*

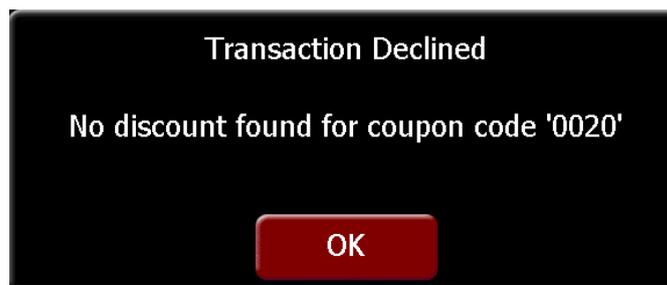
### Apply Discount

The plugin submits a balance request to the Card Commerce server which will either return an invalid card response, in which case the transaction will decline and the POS operator informed with one of the following messages:



Or, if the coupon is valid the coupon code and description will be returned to the plugin.

The plugin will then attempt to retrieve the discount details from the Aztec database by matching the coupon code with the discount name. If a discount can't be matched the transaction will decline with the following message:



### US Loyalty Errors

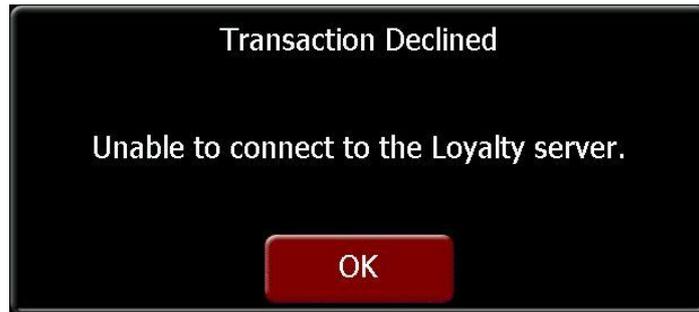
When a card number is entered that is not part of a campaign the user will be presented with the following:



If a user attempts to an already registered card:



When communication with StickyStreet has been lost and the CLM Engine is unable to connect:

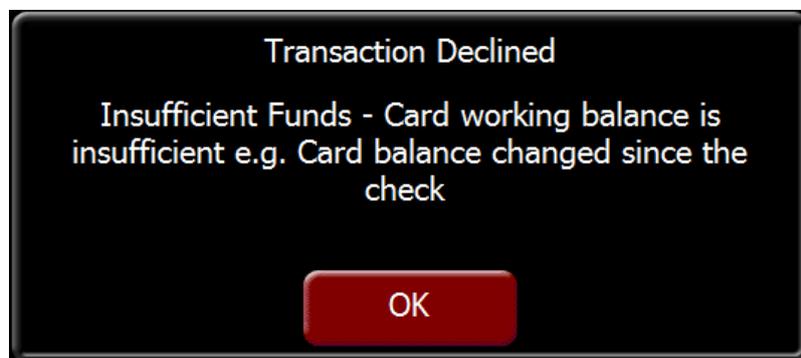


If a user attempts to cancel CLM prizes against an account with no prizes they will be presented with:

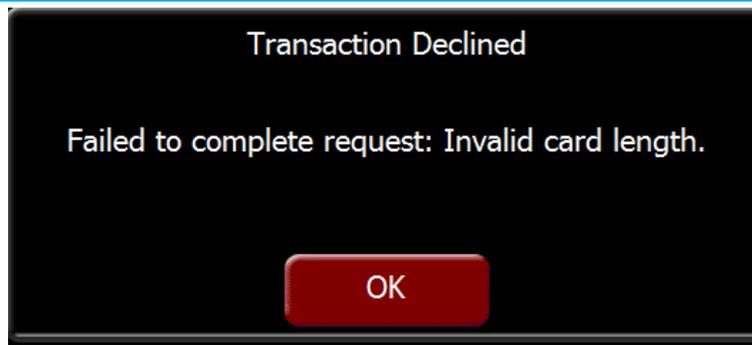


## Ceridian Errors

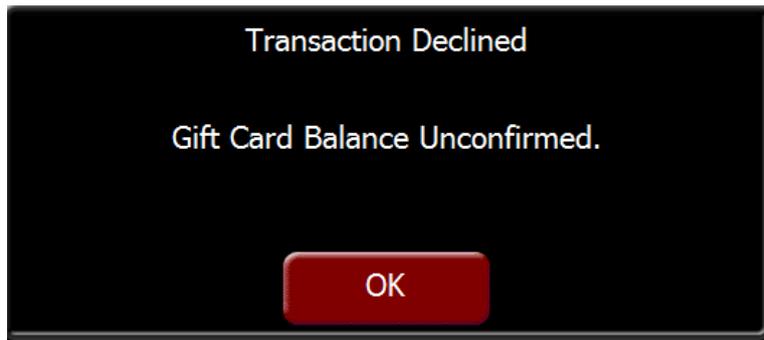
If a card does not have any funds available the user will be presented with:



If card number is entered manually and incorrectly then the user will be presented with:



If card number is entered that does not exist then the user will be presented with:



If card is invalid user will be presented with:

