



Zonal Loyalty

User Guide

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Introduction

Document Scope

This guide is aimed at site staff and describes how to carry out Zonal Loyalty tasks on site POS terminals.

Overview

Zonal Loyalty is a Zonal's own loyalty solution. PoS functionality is:

- Register Loyalty Account.
- Assign/Remove Loyalty Account.
- Zonal Loyalty Account Balance Check.
- Redeem Loyalty Prizes (and Cancel Prize Redemption).
- Zonal Loyalty Payment and Cancel Payment.
- Refunds (and reversal Refunds).

Prerequisites

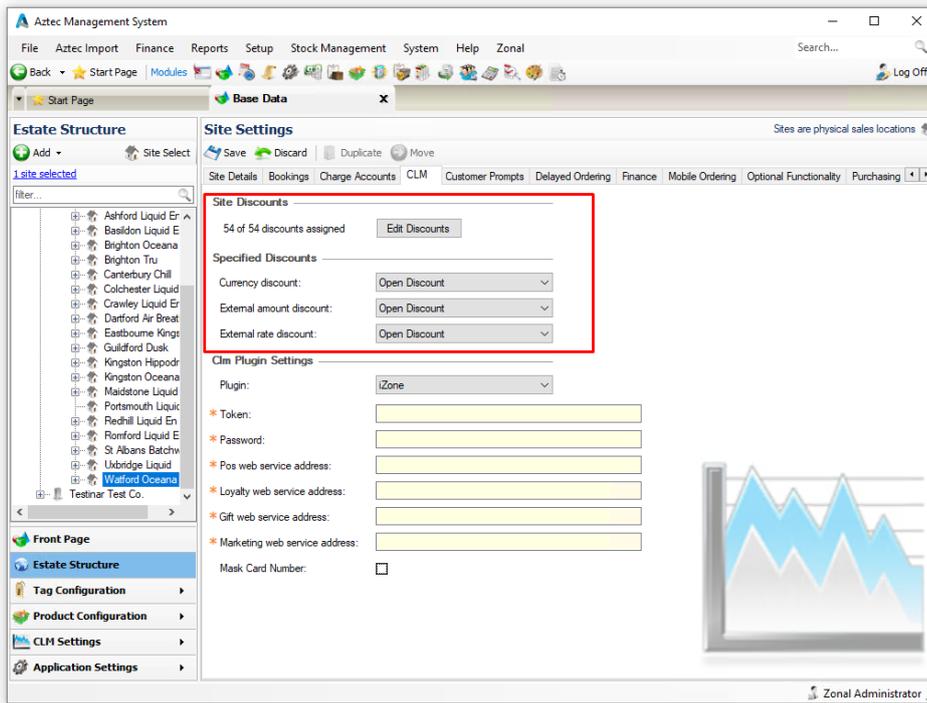
The following applications/versions and services are required to support Zonal Loyalty operation within Aztec:

- POS Integration Engine v1.54.0 or later at site.
- Aztec 3.14.0 or later at Head Office and site.

Aztec Discounts Configuration

Site Discounts

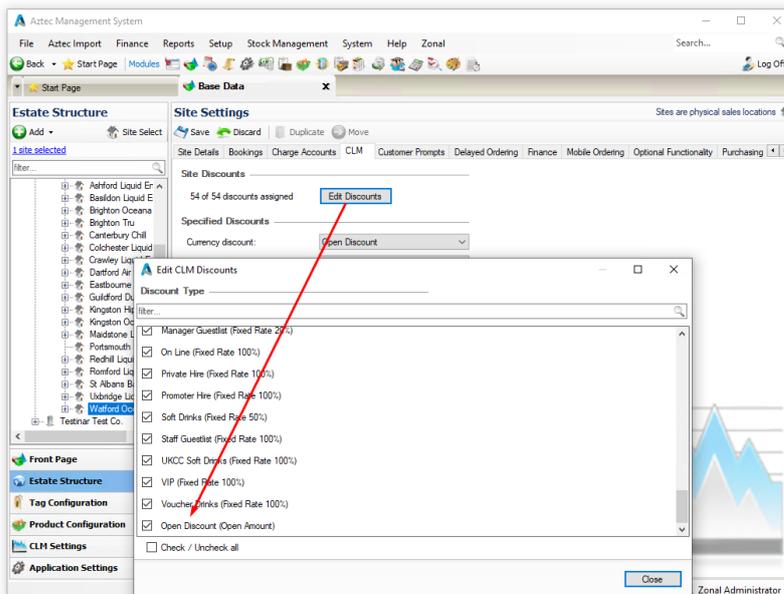
The Aztec system allows the setting of discounts. The user needs to define which, if any of these discount types need to be specified. For Site Discounts, select here which discounts it will be possible to redeem as prizes through Zonal Loyalty at site level. For example, it's possible to have a 50%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



Specified Discounts

The Specified Discounts fields are slightly different:

- 1) The Currency Discount allows to spend a cash balance on a loyalty account as a discount. This acts like a payment method but as it is a discount. Open type discount needs to be selected here to apply currency to accounts:



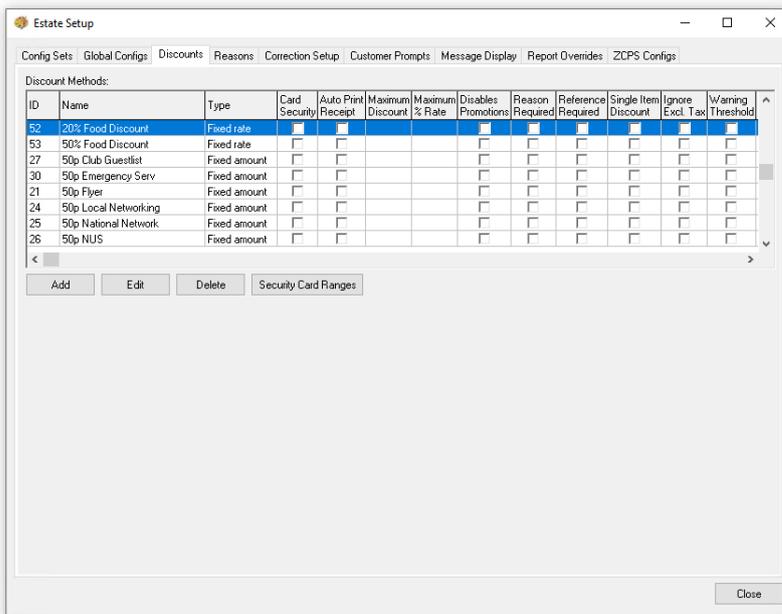
- 2) The External amount discount is for a feature in Zonal Loyalty where they allow a discount to be applied to a single instance of a product on an account (Say £1 off a pint of Guinness, but only 1 per customer).

- 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 iZone Portal.

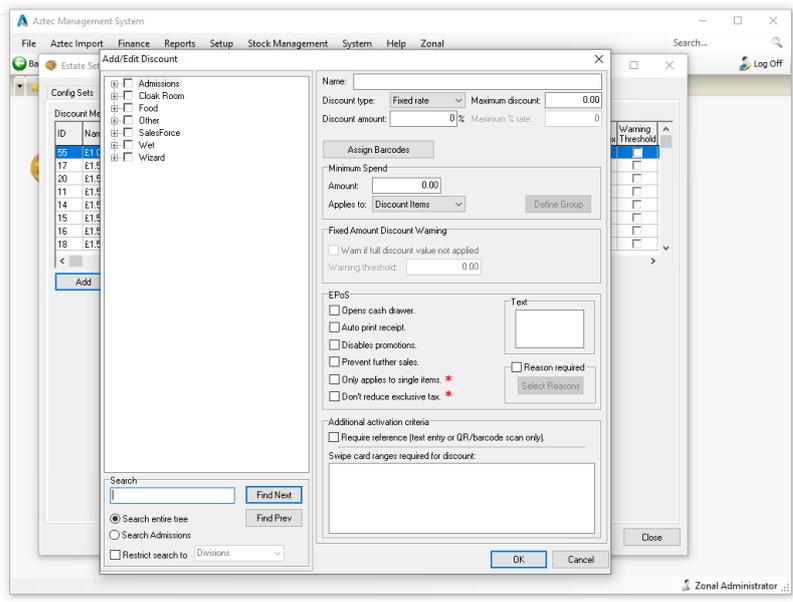
Defining Discounts

Discounts are set up in Aztec Theme Modelling at Head Office.

- Login to Aztec at Head Office and open Aztec Theme Modelling.
- From the Main menu, click Estate Setup and then click the Discounts tab:



- Click Add button to create a new discount.
- Enter an appropriate Discount Name and from the drop-down list, select the Discount Type.
- Specify desired fields and options and click OK button:



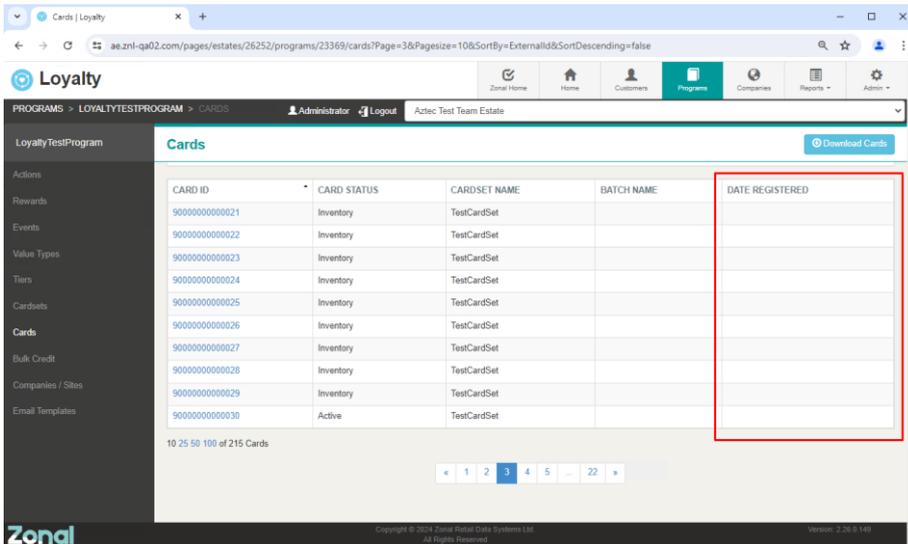
- Send changes to Pos.

Site Operation

Register Loyalty Account

The Register Loyalty Account button can be used to record basic contact information (e-mail or phone number) for the customer when a new loyalty account is created for them. Before using this button a new Loyalty program with the set of cards should be created (or already exist) on iZone Portal.

Customer registration can be performed only for not yet registered customers:



To register basic contact information (e-mail or phone number) for the customer:

- 1) Press Register Loyalty Account button:



- 2) User is then prompted to scan/swipe/enter a valid Loyalty card number.
- 3) After entering valid Loyalty card number, user is prompted to enter customer's e-mail or phone number (only one of these, either e-mail or phone number could be entered).
- 4) The POS system will display the "Transaction Approved" message about successful operation, customer is registered against the customer's loyalty account, e-mail or phone number is recorded, Loyalty card becomes Activated.
- 5) Click OK to return to the main POS account screen.

6) After successful registration, loyalty account automatically assigns to the Pos:



Assign/Remove Loyalty Account

Assigning existing Loyalty account to Pos could be done with button Assign Loyalty account.

1) Press Assign Loyalty account button:



2) User is then prompted to scan/swipe/enter a valid Loyalty card number.

3) After entering valid Loyalty card number, Loyalty account will be assigned to Pos and customer loyalty account details are displayed on Till:



4) To Remove assigned account from Pos press again button Assign Loyalty account. User will be prompted to confirm the operation.

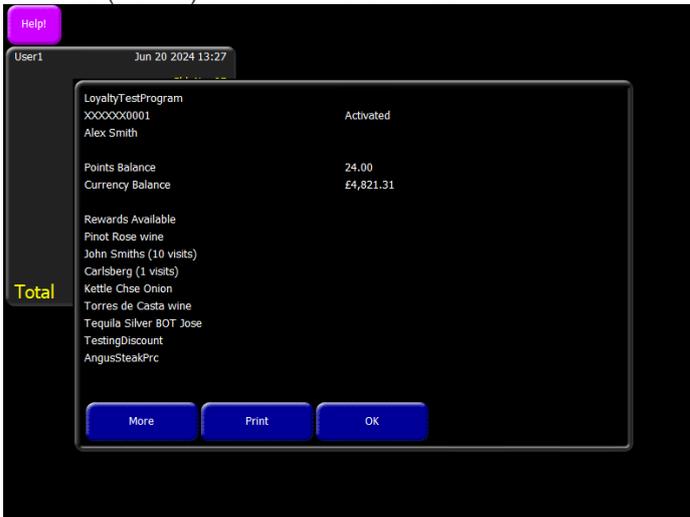
Zonal Loyalty Account Balance Check

Loyalty Balance Check button is used to perform user's account balance check operation.

- 1) Press Loyalty Balance Check button:



- 2) In case when no Loyalty account is assigned to Pos, user will be prompted to scan/swipe/enter a valid Loyalty card number. After successful balance check operation, Loyalty account will be automatically assigned to Pos.
- 3) In case when loyalty account was assigned before, user will not be prompted to scan/swipe/enter a Loyalty card number, the POS system will display user's loyalty balance details with the option to show More rewards (if exist) and Print the balance:



- 4) Click OK to return to the main POS account screen.

Redeem Loyalty Prizes

Redeeming Loyalty Prizes, rewards or discounts is possible with button Redeem Loyalty Prize. It is possible to redeem multiple rewards by repeating the Redemption steps.

- 1) Press Redeem Loyalty Prize button:



- 2) In case when no Loyalty account is assigned to Pos, user will be prompted to scan/swipe/enter a valid Loyalty card number.
- 3) In case when loyalty account was assigned before, user will not be prompted to scan/swipe/enter a Loyalty card number, the POS system will display available for redemption rewards, items and discounts.
- 4) Choose and press the reward button.

- After successful reward redemption, it will be added to Till's display and Loyalty account will be assigned to Pos automatically:



- Button Assign Loyalty account becomes grayed after successful reward redemption and it's not possible to remove Loyalty account:



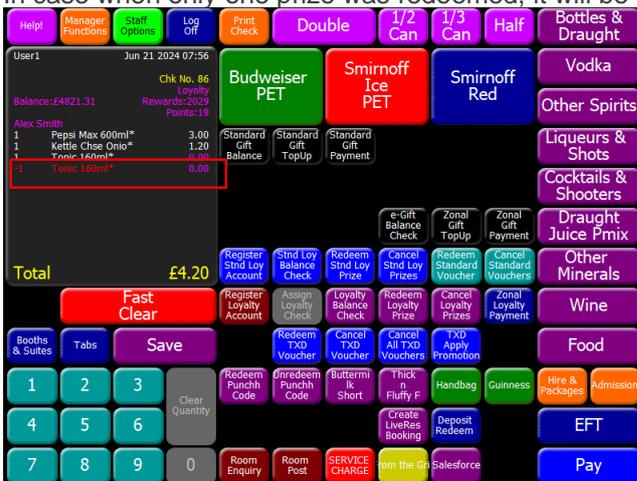
Cancel Prize Redemption

After a successful prize redemption has been performed it is possible to cancel this on the till.

- With a successful prize redemption press Cancel Loyalty Prizes button:



- In case when only one prize was redeemed, it will be canceled and till's display will show the operation:



- In case when several prizes were redeemed, user will be prompted to choose which prize to cancel, or cancel all prizes.

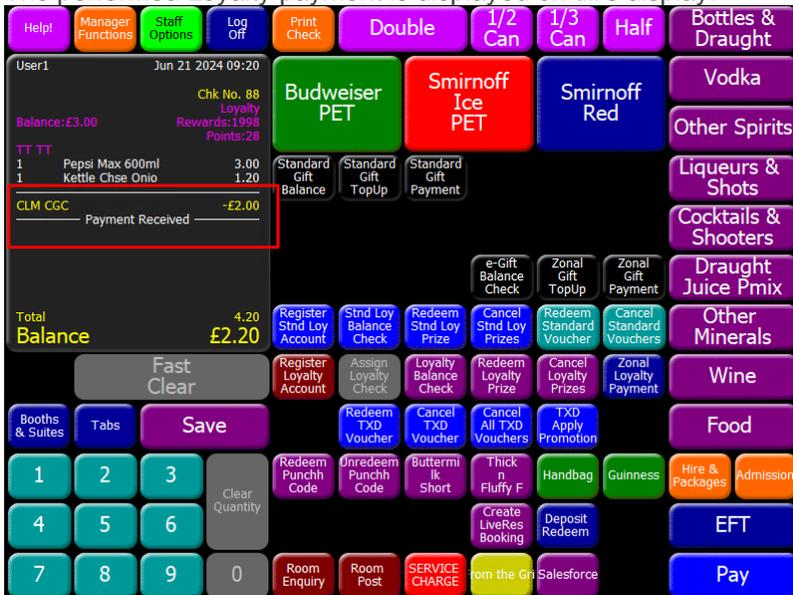
Zonal Loyalty Payment

If a user has a currency balance on their Loyalty account, it is possible to pay using Loyalty currency. It is possible to perform multiple Loyalty payments.

- 1) Once products have been added to the till's basket, press Zonal Loyalty Payment button:



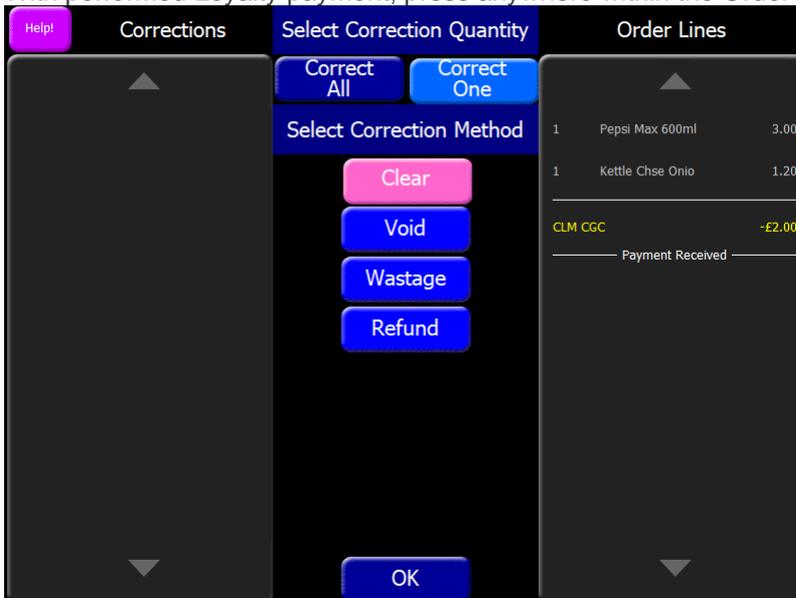
- 2) In case when no Loyalty account is assigned to Pos, user will be prompted to scan/swipe/enter a valid Loyalty card number.
- 3) In case when loyalty account was assigned before, user will not be prompted to scan/swipe/enter a Loyalty card number. User will be prompted to enter a desired payment to be performed, and the total basket price is prepopulated in the amount field.
- 4) Type the desired amount to pay and press Enter button.
- 5) After that user will be prompted to enter a desired payment amount that will be charged from their Loyalty balance. The amount field is prepopulated with either the amount value from the previous window or the available Loyalty balance (if the Loyalty balance is less than amount from the previous window).
- 6) Type the amount and press Enter button.
- 7) In case of successful payment, the POS displays a Transaction Approved screen with the transaction details and an option to print them.
- 8) Press OK button to return to the main POS account screen.
- 9) The performed Loyalty payment is displayed on till's display:



Cancel Loyalty Payment

A POS user can correct off a Zonal Loyalty Payment from an open POS account using the standard POS correction screen, in the same way as any other type of payment is corrected. It is possible to cancel multiple Loyalty payments.

- 1) With performed Loyalty payment, press anywhere within the Order Display to open the Correction screen:

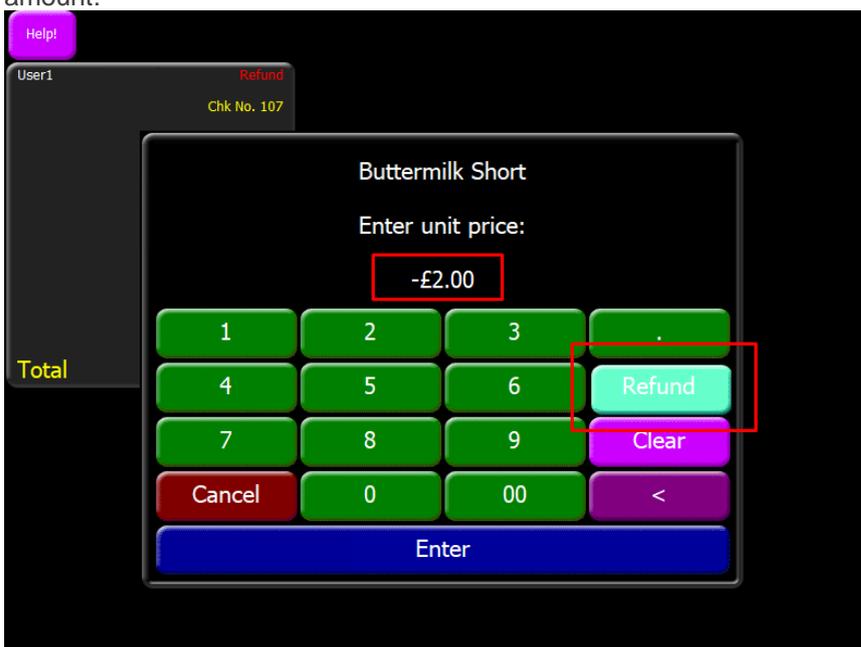


- 2) To remove a Zonal Loyalty payment, select it on the Order Lines panel to remove it from there and place it on the Corrections panel. This can be done to as many items as desired. If the POS user changes their mind, they can select it on the Corrections panel and it move it back.
- 3) To apply the selected corrections, select OK to begin the reversal.
- 4) If the reversal is successful then the payment is removed from the account.

Refunds

The Refund operation is possible on Zonal Loyalty plugin. In this case, the desired amount can be returned back to user's loyalty balance. To perform a Refund operation, a product with negative amount needs to be added to till's basket.

- 1) Add a product to till's basket that has "open price" type.
- 2) Press "Refund" button and enter a negative amount for this product. This negative amount will be a refund amount:



- 3) Press Enter button.

- 4) Choose the appropriate refund method (Void, Refund or Wastage).
- 5) Then press Zonal Loyalty Payment button.
- 6) Scan/swipe/enter a card number on which the refund will be made, and perform a successful payment operation.
- 7) The refund amount will be returned to user's loyalty balance.

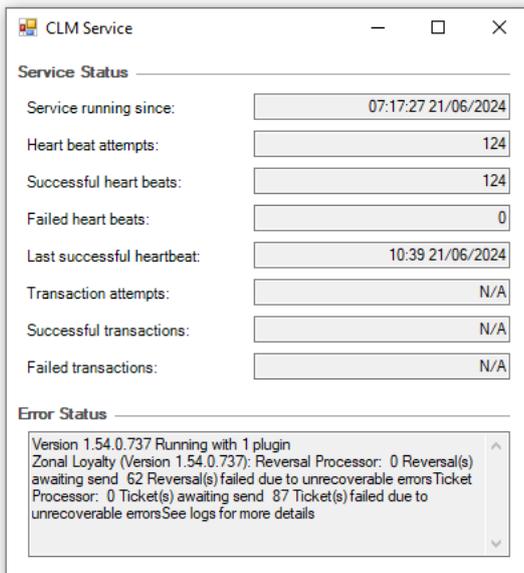
Reversal Refunds

The Reversal Refund operation is possible on Zonal Loyalty plugin. Reversal Refund operation can be performed in the same way as any other type of payment is corrected. See how to perform it in Cancel Loyalty Payment chapter.

Troubleshooting

The service monitor has been configured to show the current status of the Zonal Loyalty Plugin.

Under "CLM Service" heartbeats will fetch the status of the Zonal Loyalty plugin and other plugins installed:



Errors on Register Loyalty Account

The system can decline registration operation for several reasons. Each error is logged and a message is displayed to the POS user.

“Transaction Declined: Loyalty ID has already been registered”:

Account is already registered. If the POS user inputs a correct e-mail or phone number during the registration operation, but entered Loyalty account number is already registered, then operation will be declined and the error message will be displayed.

“Transaction Declined: There is already a registered customer with those details within this program”:

Already registered customer with that same details. If the POS user inputs a correct e-mail or phone number during the registration operation, but there is already registered customer with the same e-mail or phone number, then operation will be declined and the error message will be displayed.

“Transaction Declined: Card Number not recognized. Please try again”:

Account number doesn't exist. If the POS user inputs an incorrect account number or account doesn't exist in the Loyalty System, then operation will be declined and the error message will be displayed.

“Transaction Declined: Email must be a valid email address”:

Incorrect e-mail format or phone number. If the POS user inputs an e-mail or phone number in incorrect format, then operation will be declined and one of these error messages will be displayed.

Errors on Assigning Loyalty Account

Only title "Loyalty" is displayed on till. The account assignment takes place in the background. If there is a balance returned then the till can display it but any other response just doesn't get displayed. In case when incorrect account number has been entered during assigning operation, no error message will be displayed to the POS user. On till's display there will be only title "Loyalty", without any account details.



Errors on Balance Check

“Transaction Declined - Account does not exist.”

The system can decline a balance check operation when incorrect account number has been entered. The error is logged and a message is displayed to the POS user.

Errors on Redeeming Loyalty Prizes

“Transaction Declined - Account does not exist.”

The system will show an error message if wrong or not existing account number has been entered on "Redeem Loyalty Prize" button. The error is logged and a message is displayed to the POS user.

“Transaction Declined - Cardholder not registered. Unable to redeem.”

The system can decline a prize redemption operation when loyalty account is not activated (when loyalty account status is "Inventory" and balance is "0"). The error is logged and a message is displayed to the POS user.

“Transaction Declined – Card is suspended. Unable to redeem.”

The system can decline a prize redemption operation when loyalty account is suspended (when loyalty account status is "Suspended"). The error is logged and a message is displayed to the POS user.

Errors on Cancelling Prize Redemption

“Reversal Failed – Cannot credit suspended card”

The system can decline a cancel prize redemption operation (only for point based type of rewards) when loyalty account was suspended after prize redemption. The error is logged and a message is displayed to the POS user.

“Transaction Declined – Connection error. Unable to redeem loyalty prizes. Please try again”

In case when cancel prize redemption operation is performed and Pos system didn't receive a response from Zonal Loyalty system (a timeout occurs), the POS will display an error message.

Errors on Loyalty Payment

“Transaction Declined – Account does not exist”

The system will show an error message if wrong or not existing account number has been entered during Loyalty payment operation. The error is logged and a message is displayed to the POS user.

“Transaction Declined – No balance available on this account”

The system can decline a loyalty payment operation when there is no balance on loyalty card. The error is logged and a message is displayed to the POS user.

“Transaction Declined – Cannot debit Suspended card.”

The system can decline a loyalty payment operation when loyalty account is suspended. The error is logged and a message is displayed to the POS user.

Errors on Cancelling Loyalty Payment

“Reversal Failed – Cannot credit Suspended card.”

The system can decline a cancel loyalty payment operation when the loyalty account was suspended after successful loyalty payment. The error is logged and a message is displayed to the POS user:

“Reversal Failed – Connection error. Unable to credit account. Please try again”

In case when cancel loyalty payment operation is performed and Pos system didn't receive a response from Zonal Loyalty system (a timeout occurs), the POS will display an error message.

Errors on refunds

“Transaction Declined - Account does not exist.”

The system will show an error message if wrong or not existing account number has been entered during Refund operation. The error is logged and a message is displayed to the POS user.

"Cannot credit Suspended card."

The system can decline a Refund operation when the loyalty account is suspended. The error is logged and a message is displayed to the POS user.

Errors on reversal refunds

“Reversal Failed - Cannot debit suspended card.”

The system can decline a Reverse Refund operation when the loyalty account is suspended. The error is logged and a message is displayed to the POS user.

“Reversal Failed - Insufficient balance for transaction value X”

The system can decline a reverse refund operation when there is not enough balance on the card. The error is logged and a message is displayed to the POS user.

“Reversal Failed – Connection error. Unable to debit account. Please try again”

In case when reverse refund operation is performed and Pos system didn't receive a response from Zonal Loyalty system (a timeout occurs), the POS will display an error message.