



Zonal Gift Card

Setup guide

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Version	Date	Notes	Author
1.0	17-07-24	First draft to support the release of Zonal Gift Card	J. Hennessy

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Introduction

Document scope

This guide is aimed at Zonal and client staff that are responsible for the installation of the plugin system components and configuration of Aztec, necessary to operate Aztec with the Zonal Gift Card plugin.

Overview

Zonal Gift Card is a POS integration engine gift card plugin that integrates with Aztec to facilitate issuing of gift cards to customers via the POS system.

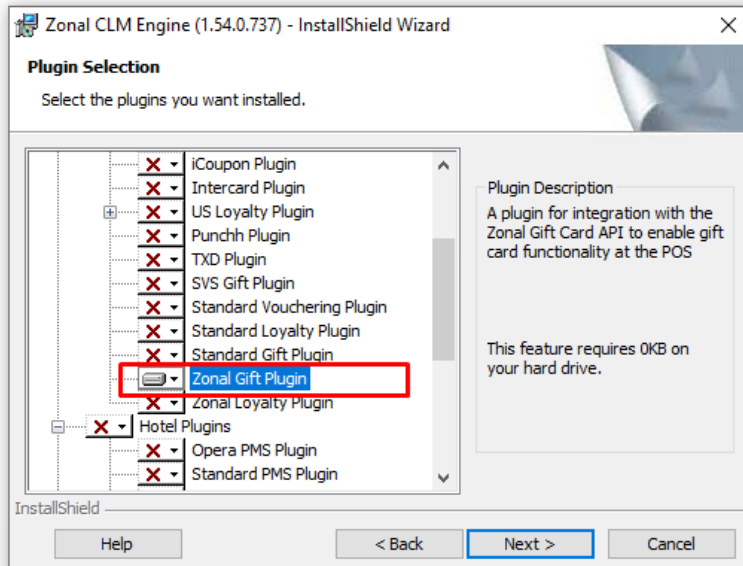
Prerequisites

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

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

Installation

The Zonal Gift Card Plugin is installed via the POS Integration Engine installer, included in a separate section reserved for plugins. This task is carried out by Zonal Technical Support staff.



Aztec Configuration



Aztec must be configured as described in this section, before the Zonal Gift Plugin can be used to process gift cards.

Base Data Configuration

CLM Configuration

CLM configuration for the Zonal Gift plugin must be setup as described below:

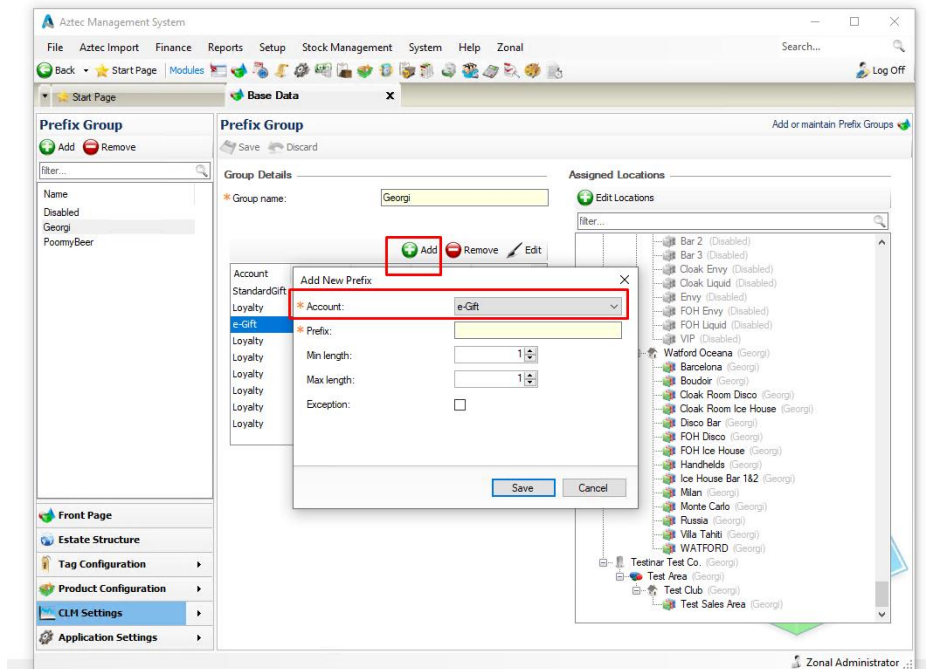
- 1) From the Head Office Aztec Start Page, open Aztec Base Data.
- 2) Within Estate Structure | Site Settings, open the CLM tab page.
- 3) In the CLM Plugin Settings drop-down list, select iZone:

- 4) Enter the required values for the plugin. Each field listed below is mandatory and must contain an entry:
 - a) Token – an authorisation token for using the Zonal Gift API, also this is the Zonal site identifier and must be unique if you need to know where the requests originated from.
 - b) Password – password for using the Zonal Gift API for endpoint security (belongs to each unique Zonal Gift token identifier).
 - c) Pos web service address – the Pos endpoint that API requests will be made to (provided by Zonal Loyalty).
 - d) Loyalty web service address – the Loyalty endpoint that API requests will be made to (provided by Zonal Loyalty).
 - e) Gift web service address - the Gift endpoint that API requests will be made to (provided by Zonal Loyalty).
 - f) Marketing web service address - the Marketing endpoint that API requests will be made to (provided by Zonal Loyalty).
- 5) Choose the optional value for the plugin if required:
 - a) Mask Card Number - if marked, hides the card number in format XXXXXX8232 on Till's display.
- 6) Select Save when complete.

Zonal Gift Card Prefixes

In order to identify the different card types new prefixes for Zonal Gift must be set up as described below:

- 1) From the Aztec Base Data main menu click CLM Settings | Prefix Group and highlight the existing CLM group.
- 2) Within the CLM prefix group window, click Add and create a new card prefix for Zonal Gift.
- 3) From dropdown field Account choose e-Gift (as shown below):



- 4) Populate the Add New Prefix window with the prefixes assigned by Zonal Gift provider.
- 5) Within the Assigned Locations group box ensure that the appropriate sites have been selected. Once a designated range has been created and assigned to a site, any cards that do not fit within the desired range will not be accepted by the EPOS System, regardless if the card is valid or not.
- 6) Click Save and exit Aztec Base Data.

Create Zonal Gift Product

To perform a Zonal Gift balance top-up operation, a new gift card product is required for the Zonal Gift plugin. To configure this product the following must be done:

- 1) From Head Office Aztec Start Page, open Product Modelling.
- 2) Click New.
- 3) Enter the desired information for the gift card product:
 - a) Define the top-up button name that will be displayed on Pos.
 - b) Set the price to Open Pricing.

- c) Tick the Is Gift Card and select Zonal CLM from the drop down:

The screenshot shows the 'Product Modelling - Global' window in the Aztec Management System. The 'Retail Name' is 'Zonal Gift TopUp'. The 'Touch Screen Name' is set to 'Zonal Gift TopUp'. The 'Product Type' is 'Std Line'. The 'Date Created' is '25/04/2024 13:06:13'. The 'Print Stream' is 'Admissions'. The 'KDS Item ID' is '4000692'. The 'Tax Rules' section shows 'VAT' as the first rule. The 'Pricing' section has 'Open Pricing' selected. The 'Is Gift Card' checkbox is checked, and the 'Zonal CLM' dropdown is open, showing 'Zonal CLM' as the selected option.

- 4) Click Close when complete.

Create Zonal Gift Payment Method

A new payment method is required for the Zonal Gift Plugin.

- 1) From the Head Office Aztec Start Page, open Aztec Finance and select Configuration | Payment Methods from the left-hand navigation bar.
- 2) Click Add and create a new payment method as shown in the example below, select type as CLM e-Gift Card and update the POS button text with what you want the end user to see:

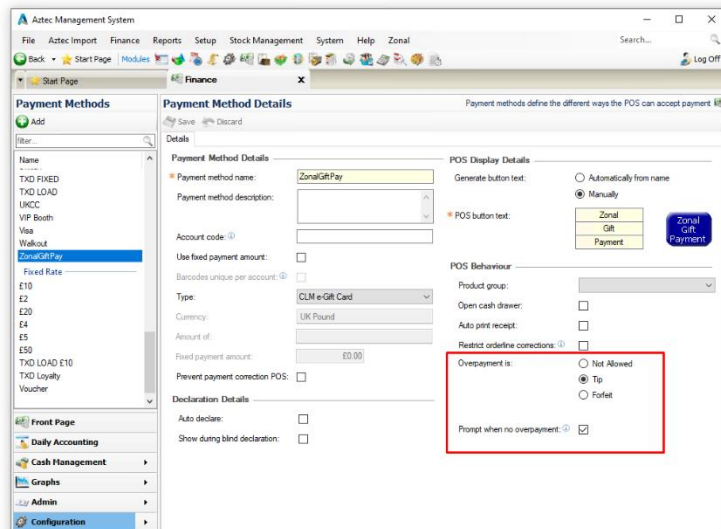
The screenshot shows the 'Payment Method Details' window in the Aztec Management System. The 'Payment method name' is 'ZonalGiftPay'. The 'Payment method description' is empty. The 'Account code' is empty. The 'Use fixed payment amount' checkbox is unchecked. The 'Type' dropdown is set to 'CLM e-Gift Card'. The 'Currency' is 'UK Pound'. The 'Amount of' is '£0.00'. The 'Fixed payment amount' is '£0.00'. The 'Prevent payment correction POS' checkbox is unchecked. The 'Declaration Details' section has 'Auto declare' and 'Show during blind declaration' checkboxes unchecked. The 'POS Display Details' section has 'Generate button text' set to 'Manually'. The 'POS button text' is 'Zonal Gift Payment'. The 'POS Behaviour' section has 'Product group' set to 'Zonal', 'Open cash drawer' unchecked, 'Auto print receipt' unchecked, 'Restrict orderline corrections' unchecked, 'Overpayment is' set to 'Not Allowed', and 'Prompt when no overpayment' checked.

- 3) Click Save and exit Aztec Finance.

Configuring Tips for Zonal Gift Payment

- 1) From the Head Office Aztec Start Page, open Aztec Finance and select Configuration | Payment Methods from the left-hand navigation bar.
- 2) Find the previously created Zonal Gift Payment method in the list on the left-hand panel.

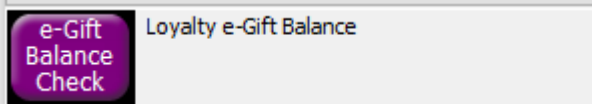
- 3) Ensure that the option for Overpayment is: Tip is checked:



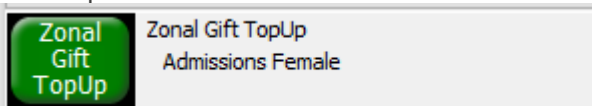
Assign Buttons to Theme(s)

Three new Zonal Gift buttons need to be added to all the required themes.

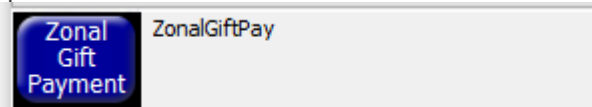
- 1) From the Head Office Aztec Start Page, open Aztec Theme Modelling and select Themes from the main menu.
- 2) Select to highlight the appropriate Available Theme in the top pane and the Theme Panel design to be changed in the middle pane and click Design.
- 3) Open the button picker, locate the new e-Gift Balance Check button in the Other Lists | Loyalty folder and add the button where required:



- 4) Locate the new Zonal Gift Top-Up button (Zonal Gift product) in the Products folder and add the button where required:



- 5) Locate the new Zonal Gift Payment button in the Other Lists | Payment folder and add the button where required:



- 6) Click Save to save the changes.
- 7) Then Close and Close again to return to the Aztec Theme Modelling main menu.

Send changes to Site

For any new Theme and Base Data settings made at Head Office to take effect at site, you must perform a comms as follows:

- 1) Select Communications from the Aztec Start Page.
- 2) Click Create Job.
- 3) Select the required site(s) and click Next.
- 4) Select the appropriate job options and click Next (Send to POS is required to pick up any changes).

- 5) Enter a suitable timeout and click Finish.

Troubleshooting

Service Monitoring

The service monitor has been configured to display the status of the Zonal Gift Card Plugin.

The 'CLM Service' -> 'Status' menu will fetch the status of the Zonal Gift Card plugin and other plugins installed.

A message will be displayed in the Error Status with the current status of any outstanding PostData reports such as:

Version XXXXXXXXXX Running with X plugins

Zonal Gift Card (Version XXXXXXXXX): Post Data Processor:

2 PostData(s) awaiting send.

3 PostData(s) failed due to unrecoverable errors.