



# Zonal Loyalty

## Setup guide

v1.0 July 2024

Version	Date	Notes	Author
1.0	17-07-24	First draft to support Zonal Loyalty	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 Loyalty plugin.

### Overview

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

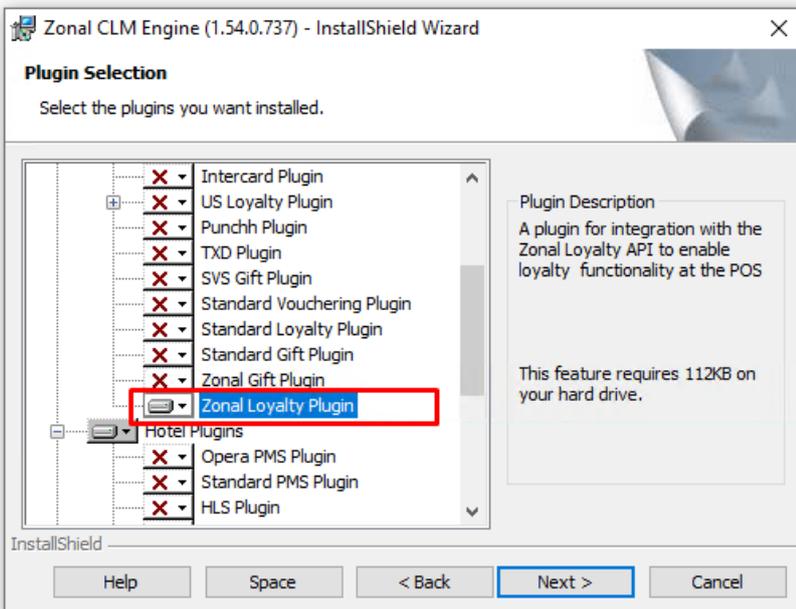
### Prerequisites

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.

### Installation

The Zonal Loyalty 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



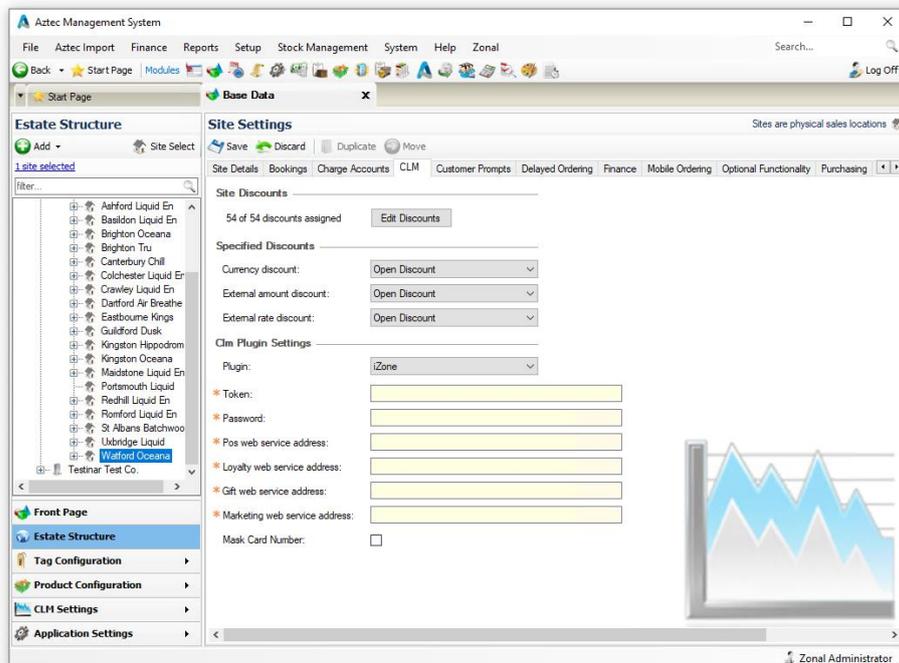
**Aztec must be configured as described in this section, before the Zonal Loyalty Plugin can be used to process loyalty cards.**

## Base Data Configuration

### CLM Configuration

CLM configuration for the Zonal Loyalty 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:

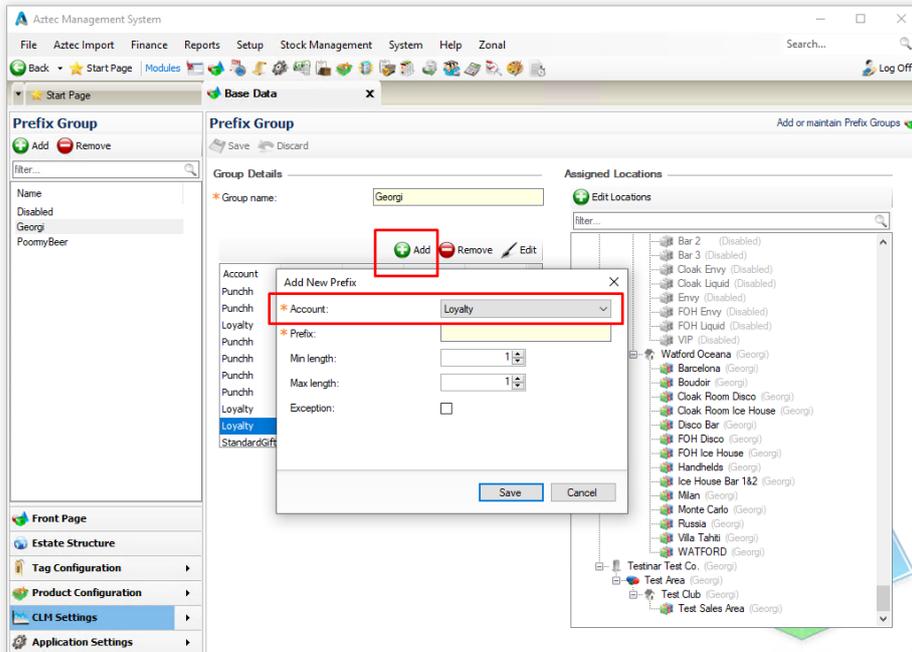


- 4) Enter the required values for the plugin. Each field listed below is mandatory and must contain an entry:
  - a) Token – an authorisation token for using the Zonal Loyalty API, also this is the Zonal site identifier and must be unique if you need to know where the requests originated from.
  - b) Password – password for using the Zonal Loyalty API for endpoint security (belongs to each unique Zonal Loyalty 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 Loyalty Prefixes**

In order to identify the different card types, new prefixes for Zonal Loyalty 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 Loyalty.
- 3) From dropdown field Account choose Loyalty (as shown below):



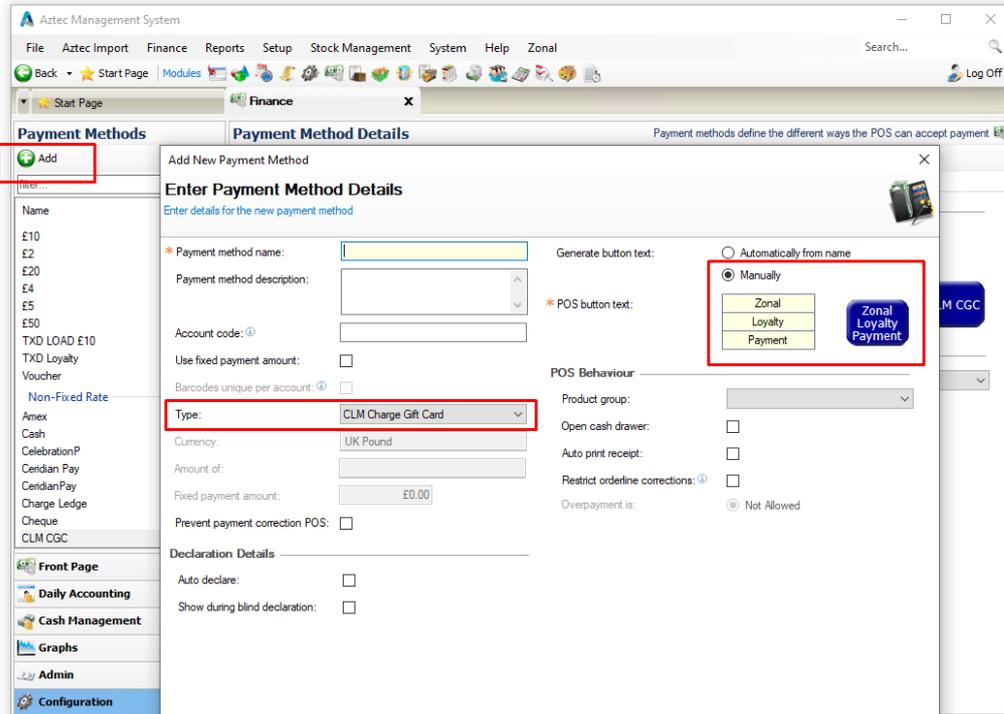
- 4) Populate the Add New Prefix window with the prefixes assigned by Zonal Loyalty provider.
- 5) Within the Assigned Locations group box ensure that the appropriate sites have been selected. Once a designated range has been created and assigned to a site, any cards that do not fit within the desired 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 Loyalty Payment Method**

A new payment method is required for the Zonal Loyalty 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 Charge Gift Card and update the POS button text with what you want the end user to see:

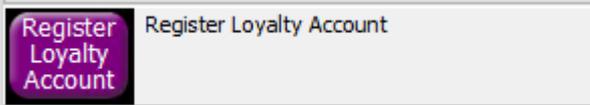


- 3) Click Save and exit Aztec Finance.

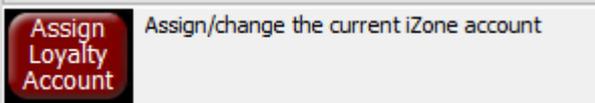
**Assign Buttons to Theme(s)**

Six new Zonal Loyalty buttons need to be added to all the required themes.

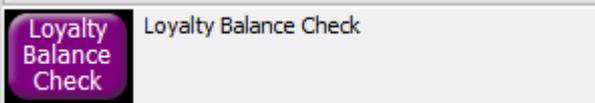
- 1) From the Head Office Aztec Start Page, open Aztec Theme Modelling and select Themes from the main menu.
- 2) Select to highlight the appropriate Available Theme in the top pane and the Theme Panel design to be changed in the middle pane and click Design.
- 3) Open the button picker, locate the new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



- 4) Locate the new Assign Loyalty Account button in the Other Lists | Loyalty folder and add the button where required:



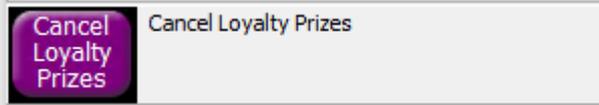
- 5) Locate the new Loyalty Balance Check button in the Other Lists | Loyalty folder and add the button where required:



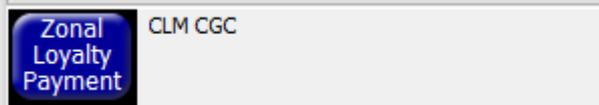
- 6) Locate the new Redeem Loyalty Prize button in the Other Lists | Loyalty folder and add the button where required:



- 7) Locate the new Cancel Loyalty Prizes button in the Other Lists | Loyalty folder and add the button where required:



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



- 9) Click Save to save the changes.
- 10) 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 Loyalty Plugin.

The 'CLM Service' -> 'Status' menu will fetch the status of the Zonal Loyalty 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 Loyalty (Version XXXXXXXXX): Post Data Processor:

2 PostData(s) awaiting send.

3 PostData(s) failed due to unrecoverable errors.