

NCR Silver Pro Restaurant Edition Integration

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This article describes the integration of the SessionM loyalty platform with the NCR Silver point-of-sale system. The article provides an overview of the integration, describes the basic workflows used in the integration, and presents walkthroughs of common usage scenarios.

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SessionM in the NCR Silver POS environment

NCR Silver is a cloud-based point-of-sale (POS) solution designed for small businesses, including retail stores, restaurants, cafes and bars. Cost-effective and easy-to-use, NCR Silver delivers a secure, reliable iOS solution with powerful features, reporting, and 24/7 support.

The SessionM Loyalty Platform provides businesses with the ability to incentivize sales by rewarding redeemable points on purchases and providing targeted offers to loyalty customers.

SessionM has partnered with NCR to integrate these two platforms to enable loyalty and offer management functionality for point-of-sale systems supported by NCR Silver. Loyalty customers can earn points and redeem offers digitally in real-time at the point of sale.

Loyalty points

SessionM **loyalty points** are based on a simple principle: the more a customer spends, the more points she gets in return. Every time a customer makes a purchase on a brand's website (or in a brick and mortar store), she earns a certain amount of points depending on the amount spent. For example, a customer earns 10 points for every \$1 spent online and in retail stores, and five points for every \$1 spent in outlets. Customers then use these points to redeem rewards. By rewarding customers with points that they can redeem for rewards, a brand not only increases its average order value: it also encourages customers to invest in that brand, which reduces the likelihood customers switch to a competitor.

Offers



A SessionM **offer** is an item of value given to the customer as a reward, something that a customer can earn, redeem or be presented. Offers are excellent ways to encourage customers to perform behaviors beneficial to your company. For example, you could create an offer that promises your customers that, as a reward for buying four lattes in a week, the fifth latte is free.

Offers can take multiple forms. You can choose from a number of offers that have been created in the SessionM Offers module, such as digital or physical goods, loyalty

points, discounts or coupons. Or, you can use an external offer management system in conjunction with SessionM to create offers.

Offers are distributed to loyalty customers through bulk offers, campaigns and reward stores. Eligible offers populate loyalty customers' digital wallets. Loyalty customers can redeem an eligible offer when they make a purchase. The customer service agent looks up the loyalty customers profile to obtain a list of eligible offers. As items are added to the customer's bill, SessionM determines the best available offer in the customers wallet and makes that offer available for redemption. The customer service agent can then apply that offer to the bill.

Note that only a single SessionM offer can be applied to a bill. Multiple offers cannot be applied to the same bill.

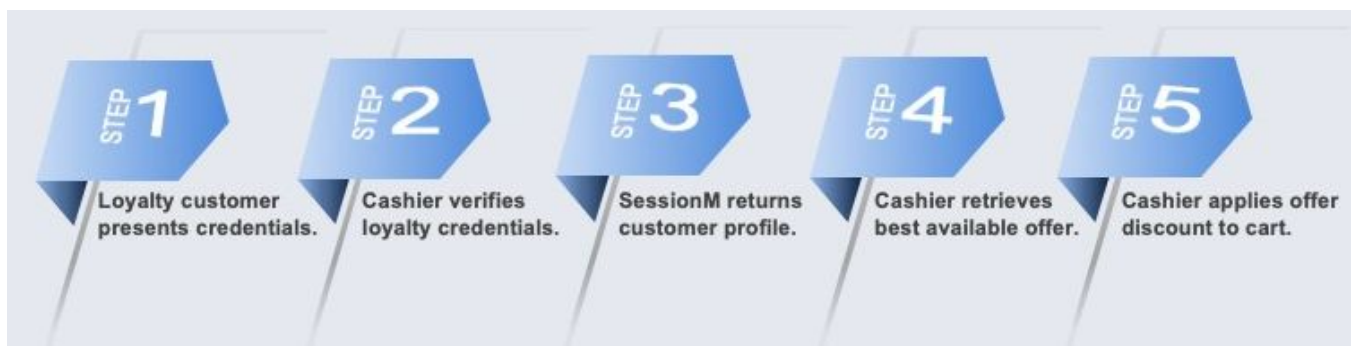
Integration workflows

Two workflows are shown below. Each walkthrough shows the steps that the cashier performs using the NCR Silver interface to identify the loyalty customer so that 1) the customer receives loyalty points for this purchase and 2) SessionM applies a loyalty offer (if applicable).

Earn points and retrieve best available offer workflow

In this workflow, a loyalty customer makes a purchase and presents loyalty credentials to a cashier at the restaurant point-of-sale. The cashier verifies the loyalty credentials with SessionM. Once verified, SessionM returns information about that customer to the POS, including customer name and the best available offer in the customer's wallet (when applicable). Once the purchase is completed, loyalty points are awarded to the customer for this purchase.

Let's examine this workflow more closely.



Prerequisite conditions

- Loyalty offers need to be configured within the Offers module in the SessionM loyalty platform.
- The offer to be redeemed must be in the customer's offer wallet.

Workflow steps

Step 1. A loyalty customer makes a purchase and presents credentials verifying their participation in the loyalty program to the cashier.

Step 2. Using the credentials provided, the cashier looks up the loyalty customer's profile.

Depending on the available equipment, the cashier keys/scans/swipes the customer's loyalty credentials. Cashiers can look up loyalty customers by:

- **Loyalty ID.** Supported options for customer Loyalty IDs include SessionM User ID (UUID) and SessionM External ID (Non-UUID String). The most typical applications of these Loyalty IDs are embedded digital loyalty card QR codes within a brand's mobile app. These can be scanned via the tablet camera.

- **Phone number.** Currently SessionM supports returning a successful single-match lookup of a profile with the corresponding phone number in the SessionM Platform.

Take note of the following restrictions regarding loyalty customer lookup:

- Searching for a loyalty customer requires an exact match. Only a single match can be returned. Multiple matches not supported.
- Email is not supported by NCR Silver for looking up loyalty customers.

Step 3 success. If there is a successful match, SessionM returns the following information about a loyalty customer:

- Name.
- Member ID.
- Email address.
- Points balance for each loyalty point account in which the customer is participating.

Step 3 failure. If the loyalty ID or phone number submitted by the customer service agent is not found in the SessionM loyalty database (because of a typing error, because the profile does not exist in the database, or multiple profiles in the database have the same phone number), the following error is returned:

No Customer Match. The system was unable to find the indicated loyalty customer.

Step 4. The cashier retrieves the best available offer for the items in the customer's cart.

Take note of the following:

- If a loyalty profile lookup occurs before items have been added to the check, all offers in a customer's wallet will be returned to the cashier but cannot be applied to the check until items are added. This feature gives the cashier and customer visibility into the wallet while preventing improper discount calculation by ensuring items are ordered before offer application.
- To avoid miscalculation of a loyalty discount based on the integration flow of NCR Silver APIs, once one or more items have been added to a check, only a **single loyalty offer** is presented to the cashier, even if the customer has multiple offers in his or her wallet. In order to ensure it is the most likely offer to be applied to the check, SessionM evaluates the existing item basket to return a single offer that is eligible for the items purchased and presents the greatest discount amount to the customer based on all offers currently in the wallet.
- If the customer would prefer to use a different offer in his or her wallet than the single offer returned to the POS, the applicable offer can be chosen in the customer's companion loyalty mobile app (where applicable) and shown to the cashier for redemption. This is reviewed in more detail in the "Redeeming specific offer workflow" section below.

- Whenever an item is added to or removed from the check, SessionM re-evaluates the items to determine if a different offer now qualifies as the best available offer and returns that applicable offer to the POS.

Step 5. The cashier applies the offer to the bill. The purchase is discounted as indicated by the offer.

Post workflow processing

- Once the selected offer is applied to the check, it is temporarily removed from the loyalty customer's wallet.
- Once the transaction is finalized, the selected offer is permanently removed from the loyalty customer's wallet and marked as "redeemed" in the SessionM Platform.
- If any loyalty points were earned by the transaction based on the brand's loyalty program structure, the loyalty customer's points total is adjusted in the SessionM Platform.

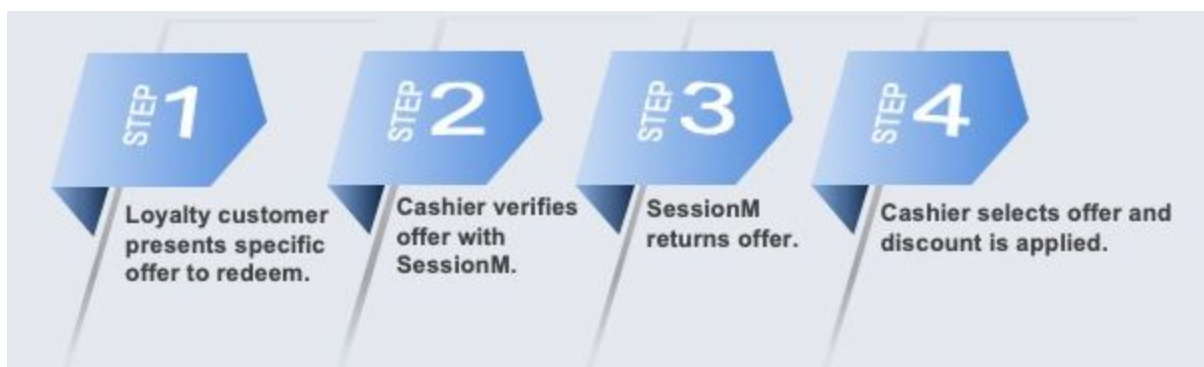
Variations in workflow

- The cashier verifies the customer's loyalty credentials before any items are added to the cart. In this scenario, SessionM returns a list of all available offers for that loyalty customer.
- Additional items are added to or removed from the bill after SessionM has determined the best available offer. In this scenario, SessionM re-evaluates the selected items to determine what is now the best available offer.

Earn points and redeem specific offer workflow

In this workflow, a loyalty customer presents a specific offer to a cashier at a restaurant. Once the offer has been validated, SessionM returns the discount applicable to that offer. Once the purchase is completed, loyalty points are awarded to the customer for this purchase.

Let's examine this workflow more closely.



Prerequisite conditions

- Loyalty offers need to be configured within the Offers module in the SessionM loyalty platform.
- The offer to be redeemed must be in the customer's offer wallet.

Workflow steps

Step 1. A loyalty customer presents a specific offer in her digital wallet to a cashier at a restaurant. This digital wallet is typically represented in a companion loyalty mobile app offered by the brand that is integrated with SessionM APIs. Depending on the integration plan between the mobile app and SessionM, the offer can be displayed in the form of a barcode, QR code or TTL code. (A TTL code is a limited life, short length code.) Barcodes and QR codes can be scanned by the camera on the POS tablet or applicable hardware attachment. The TTL code can be entered manually by the cashier.

Step 2. The cashier enters the offer into the NCR Silver POS system. Depending on the available equipment, the cashier keys/scans/swipes the offer, which is submitted to SessionM for validation.

Step 3 success. If the offer is valid, SessionM returns the offer name and applicable discount amount for cashier selection. **Step 3 failure.** If the offer is not found in the SessionM loyalty database, an error is returned:

Step 4. The cashier applies the offer to the bill. The purchase is discounted as indicated by the offer.

Post workflow processing

- Once the selected offer is applied to the check, it is temporarily removed from the loyalty customer's wallet.
- Once the transaction is finalized, the selected offer is permanently removed from the loyalty customer's wallet and marked as "redeemed" in the SessionM Platform.
- If any loyalty points were earned by the transaction based on the brand's loyalty program structure, the loyalty customer's points total is adjusted in the SessionM Platform.

Variations in workflow

- The loyalty customer initially presents loyalty credentials but, after the credentials have been verified, decides to redeem a specific offer instead of the best available offer. In this scenario, the cashier must first remove the loyalty customer from the bill and then enter the specific offer desired by the customer.
- The cashier enters a specific offer before any items have been added to the bill. In this scenario, SessionM does not return an offer. An item must have been added to the check before any offers can be returned. As soon as an item is added to the bill, SessionM returns the specific offer previously requested.
- The loyalty customer presents an expired offer. SessionM does not return a valid offer.
- Additional items are added to or removed from the bill after SessionM has validated the offer presented. In this scenario, SessionM re-evaluates the items on the bill and determines if a different offer now qualifies as the best available offer.

Earn loyalty points after purchase

NCR Silver supports printing a barcode on the receipt for assigning loyalty points after a purchase is completed. Suppose, for example, that a customer has not provided loyalty credentials or used an offer. In this scenario, the cashier at the POS can print a barcode on the receipt. At some later time, the customer can scan the barcode using a companion loyalty app (integrated with SessionM APIs) to retroactively earn points for the purchase.

Interface walkthroughs

The following interface walkthroughs are discussed below:

- Earn points and retrieve the best offer available to customer
- Earn points and redeem a specific offer presented by the customer

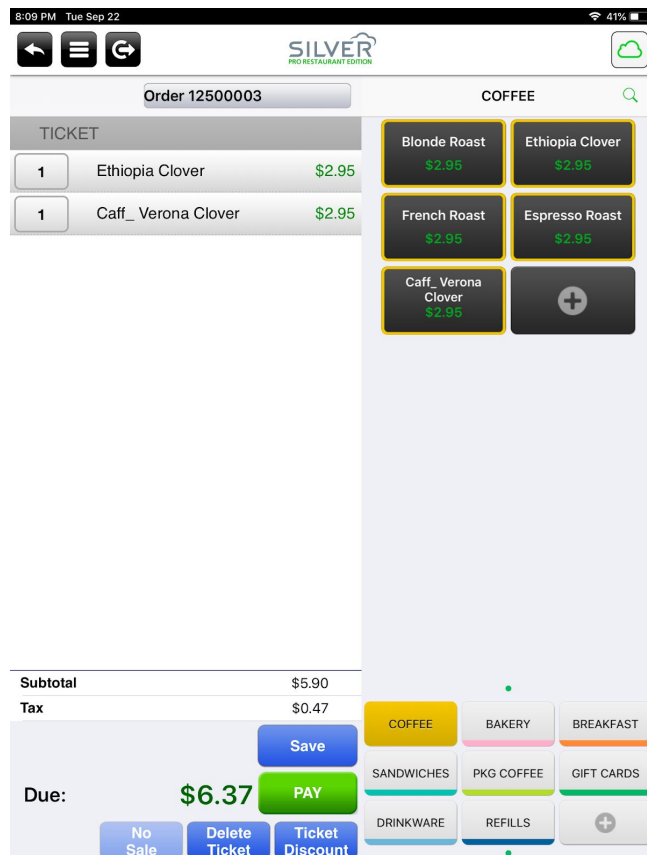
Each walkthrough shows the steps that the cashier performs using the NCR Silver interface to identify the loyalty customer so that 1) the customer receives loyalty points for this purchase and 2) SessionM applies a loyalty offer (if applicable). For illustrative purposes, the walkthroughs take place in a coffee shop.

In addition, there is a walkthrough that shows how to remove a loyalty customer from a cart.

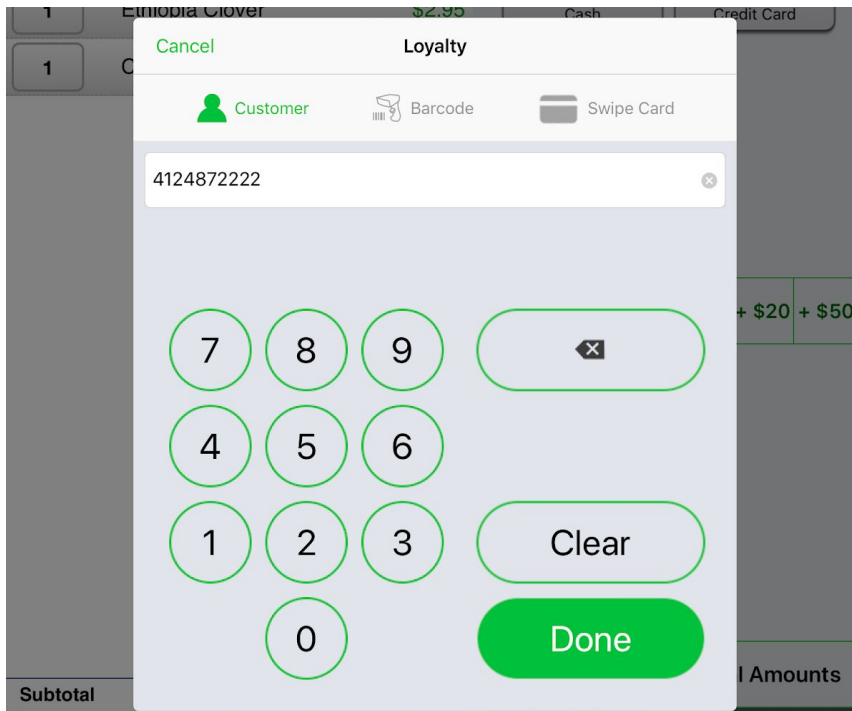
Earn points and retrieve best available offer

In this walkthrough a loyalty customer purchases several bags of coffee. SessionM validates that the customer is enrolled in a loyalty program so that points are awarded to this customer and determines the best available offer (if any) that applies to this purchase.

1. A loyalty customer buys two bags of coffee and informs the barista that she is a member of the coffee shop's loyalty program.

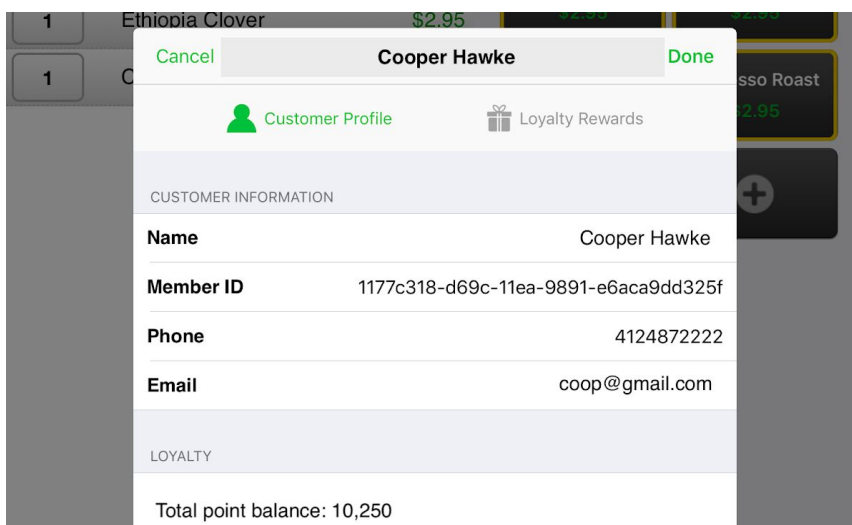


- The barista looks up the loyalty customer's profile. To do this, the barista clicks the **PAY** button and then the **Loyalty** button in the NCR Silver app. The barista then enters the customer's phone number and presses **Done**.

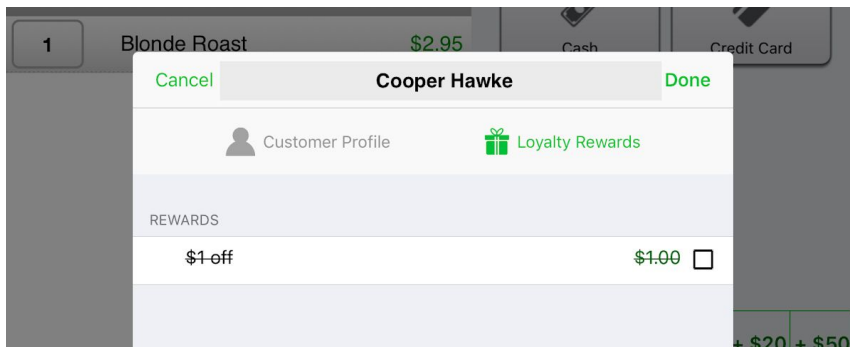


Note that the barista, depending on the equipment available to her, could have scanned or swiped the customer's credentials. If the brand is using digital loyalty cards, the "Scanner" tab would be leveraged. If the brand is using physical loyalty cards with applicable equipment, the "Swipe Card" tab would be leveraged.

- SessionM returns the customer profile.

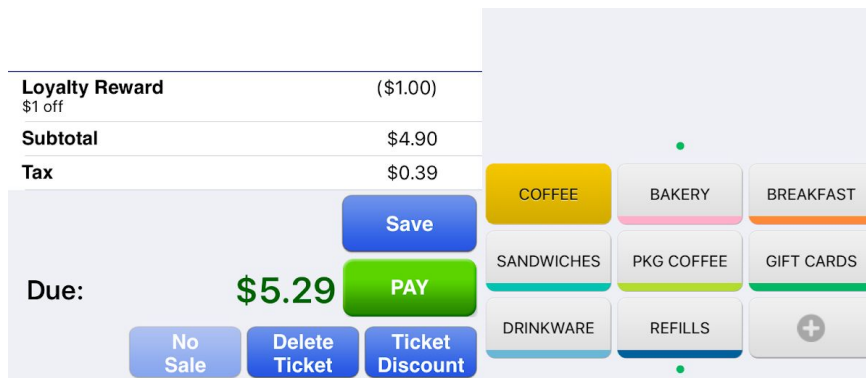


- The barista clicks the **Loyalty Rewards** button to retrieve the best offer available (if any) to this client for this purchase. SessionM identifies the best available offer. The barista clicks the check box next to the offer to select it and clicks **Done**.

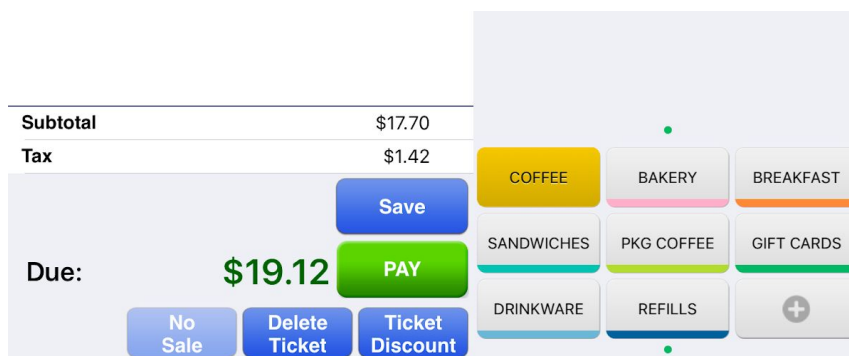


For the items currently in the customer’s cart, the best available offer is one dollar of the total purchase price.

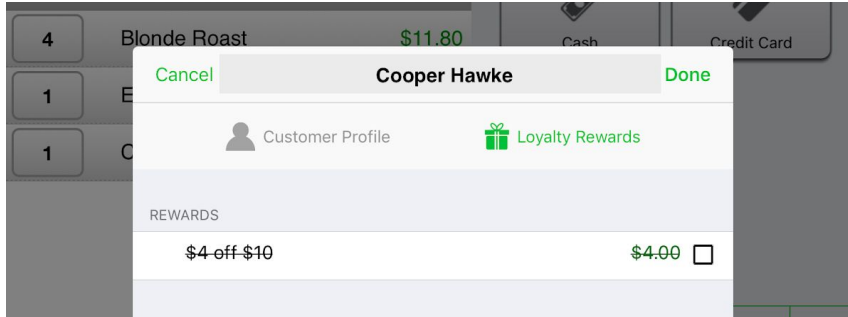
- The discount associated with the offer is applied to the check.



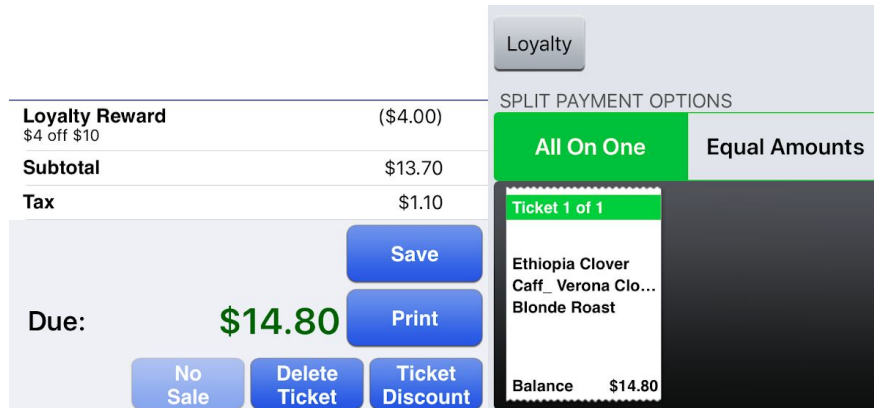
- At this point, the barista could click **Cash** or **Credit Card** to complete the purchase. But let’s suppose that the customer decides to buy four more bags of coffee. The barista returns to the Items screen and adds the coffee to the check.



- The barista clicks PAY to complete the sale. When the barista clicks PAY, SessionM re-evaluates the items in the cart to determine if the best available offer has changed. Because the purchase now exceeds \$10, SessionM changes the best available offer from the one previously selected to a new offer that provides a discount of \$4 when the total sale exceeds \$10.



- The new (and better!) discount is applied to the check after cashier selection.

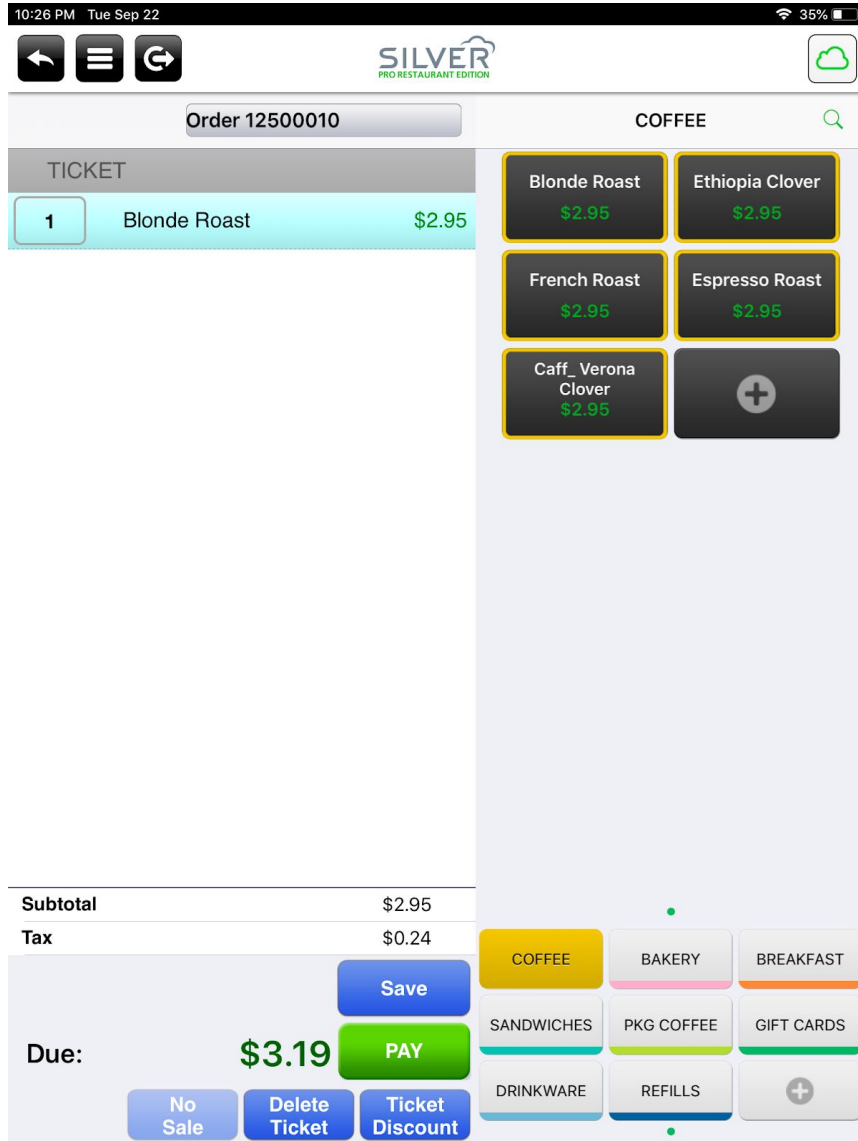


Earn points and redeem specific offer

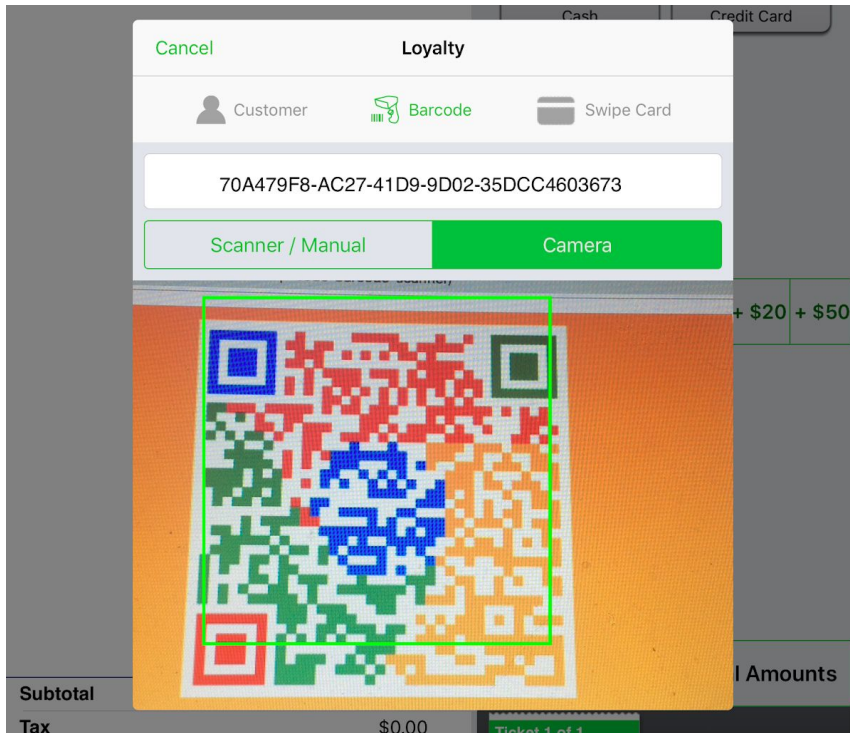
In this walkthrough a loyalty customer makes a purchase and then presents a specific offer that she wants to redeem, rather than the best available offer shown in the previous walkthrough. Suppose, for example, that the customer has an offer that expires today. Even if that offer is not the best available offer in her wallet, she wants to use that offer rather than letting it expire.

As SessionM Offer IDs are directly linked to specific loyalty users, the use of an offer as shown in this flow also applies the customer's loyalty profile to the sale to ensure she earns loyalty points for the purchase.

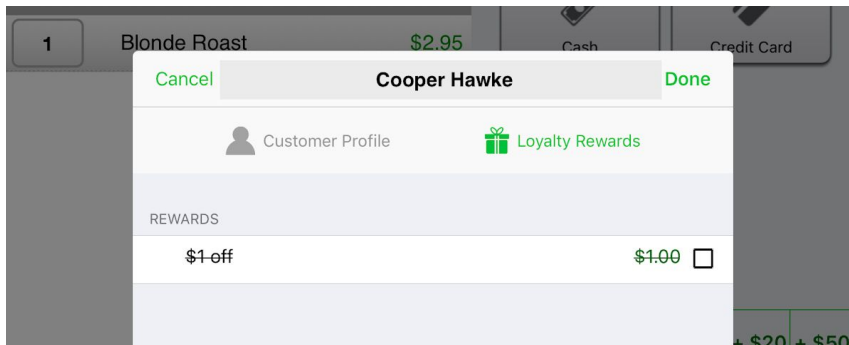
1. A loyalty customer buys a pound of Blonde Roast coffee. The customer has an offer that expires today, so she wants to use that specific offer. The offer is in the form of a QR code on her smartphone (typically a companion loyalty app integrated with SessionM APIs). The customer shows the QR code to the barista.



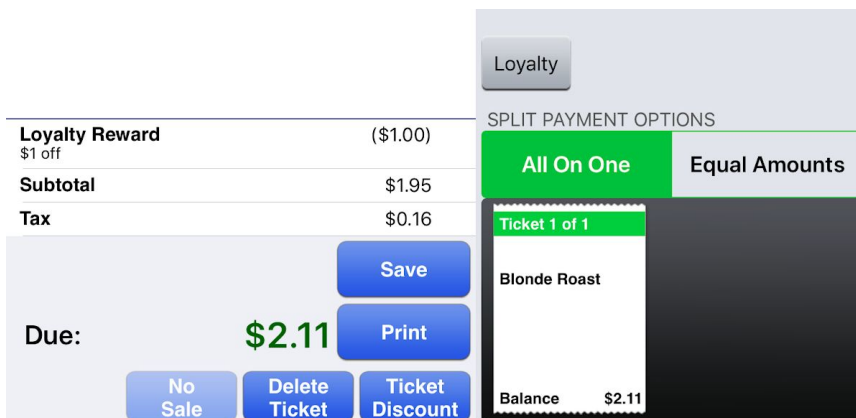
2. The barista clicks the **PAY** button, followed by the **Loyalty** button, followed by the **Barcode** tab, and then scans the QR code using the iPad's camera.



3. SessionM identifies the customer profile associated with the offer (so that points are awarded to this customer and then validates the offer. The barista clicks the check box to apply the offer to the check.



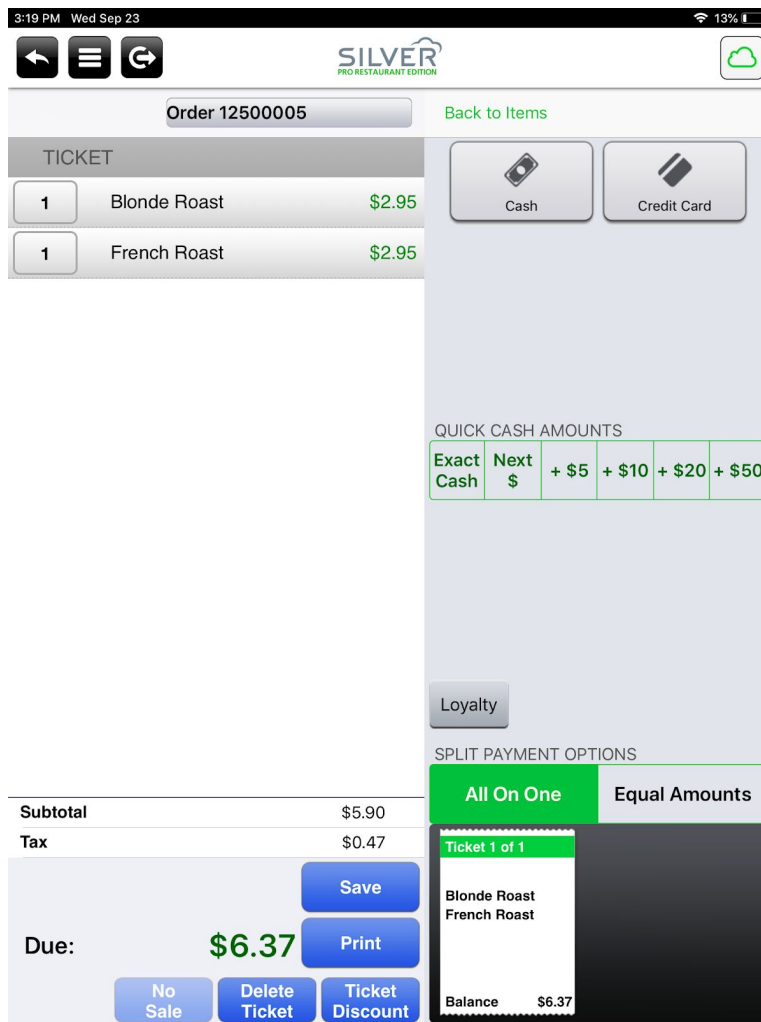
4. The discount is applied to the check and the barista can complete the sale.



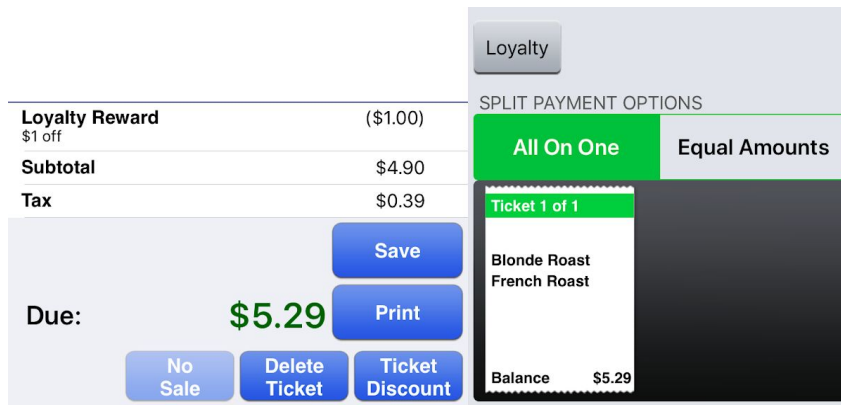
Remove loyalty customer and offer from bill

In this walkthrough, a loyalty customer begins to purchase several bags of coffee and apply an offer to it. Before completing the purchase, however, the customer decides not to use her loyalty credentials. Perhaps she decides she does not want the coffee. Or perhaps her companion offers to pay for the purchase. Whatever the reason, the cashier removes the loyalty customer from the bill (which removes any applied discount as well).

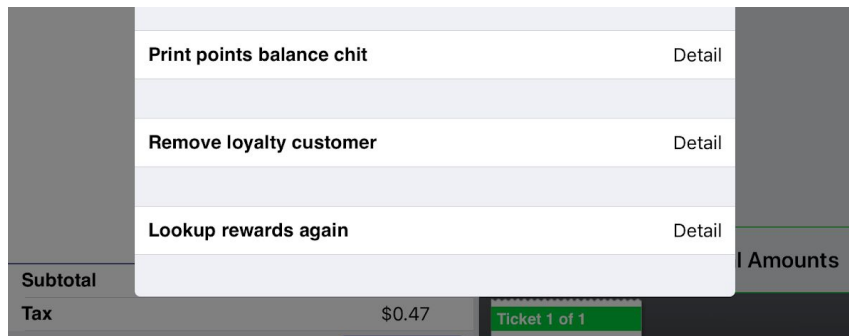
1. A loyalty customer begins to purchase two bags of coffee. She presents her loyalty credentials to the cashier.



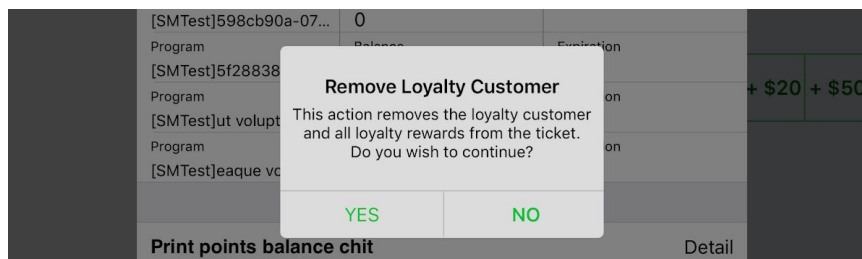
2. As in the previous walkthroughs, the cashier validates the credentials and applies the best available offer to the purchase.



- But before the cashier completes the purchase, the customer indicates that she does not want this purchase associated with her loyalty account. The cashier displays the customer profile, and scrolls down to the **Remove loyalty customer** button.



- When prompted, the cashier clicks **YES** to confirm that the loyalty customer should be removed from this bill.



- The loyalty customer (and the discount) are removed from the bill. At this point, the cashier can associate a different loyalty customer with the bill, or complete the transaction with no associated loyalty customer.

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SILVER
PRO RESTAURANT EDITION

Order 12500005 [Back to Items](#)

TICKET

1	Blonde Roast	\$2.95
1	French Roast	\$2.95

Cash Credit Card

QUICK CASH AMOUNTS

Exact Cash	Next \$	+ \$5	+ \$10	+ \$20	+ \$50
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Loyalty

SPLIT PAYMENT OPTIONS

All On One Equal Amounts

Subtotal	\$5.90
Tax	\$0.47
Due:	\$6.37

Save Print

No Sale Delete Ticket Ticket Discount

Ticket 1 of 1

Blonde Roast
French Roast

Balance \$6.37