INTEGRATION WITH NCR BUSINESS SUPPORT PLATFORM

NCR BSP Integration – Using SessionM Loyalty and Offer Management with NCR-based POS Systems

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Introduction

SessionM has partnered with NCR to enable loyalty and offer management functionality for point-of-sale systems that are supported by NCR's Business Support Platform (BSP). For POS system requirements or detailed information on configuring a POS for communication with a loyalty provider, please refer to NCR's *Feature Focus Guide: Generic Loyalty Using BSP*. This guide functions as supplemental user documentation to review SessionM loyalty functions on the POS once configuration to BSP, and the loyalty provider, has been established.

This guide instructs users on the best methods to facilitate the following at the POS:

- Customer Assignment / Loyalty Attribution
- Loyalty Offer Redemption

For additional questions or topics not covered here, please reach out to your SessionM and NCR account managers.

Customer Assignment/Loyalty Attribution

Once SessionM Loyalty has been configured at the POS, a cashier/server will be able to assign a loyalty member to a check. Assignment of a loyalty customer is typically done to either ensure a customer receives loyalty points for the respective purchase and/or to view and use a customer's available loyalty offers.

There are three methods of customer assignment that are currently supported by SessionM:

- Assigning Customers by Loyalty ID

- Assigning Customers by Customer Phone Number

- Assigning Customers by Customer Email Address

It's important to note that while a customer can be assigned to a check at different points of the transaction, the on-screen experience will vary slightly depending on the order of operations. Adding a customer once the cashier/server has finished adding items to the check and selected an order mode, which is the recommended method, will be used for the purpose of demonstrating each assignment method below. Alternate assignment flows are covered in further detail at the conclusion of this section.

Assigning Customers by Loyalty ID

After adding items to the check, you are ready to begin assigning customer by loyalty ID.

1. On the Tenders screen, press **Loyalty**, which is outlined in red.
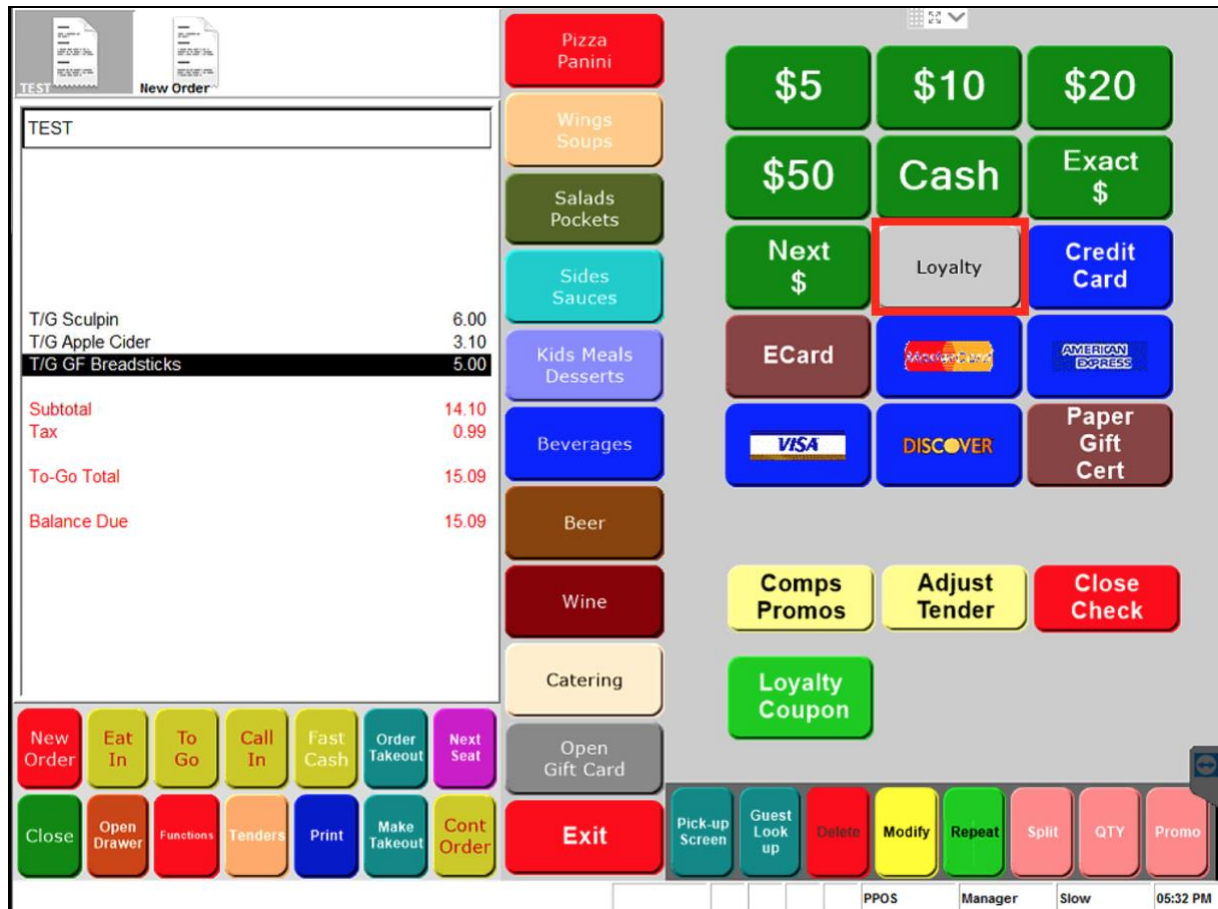

Note that while the Loyalty button is located in the recommended location, it can be placed in a different location based on the button configuration instructions included in NCR's Feature Focus guide.

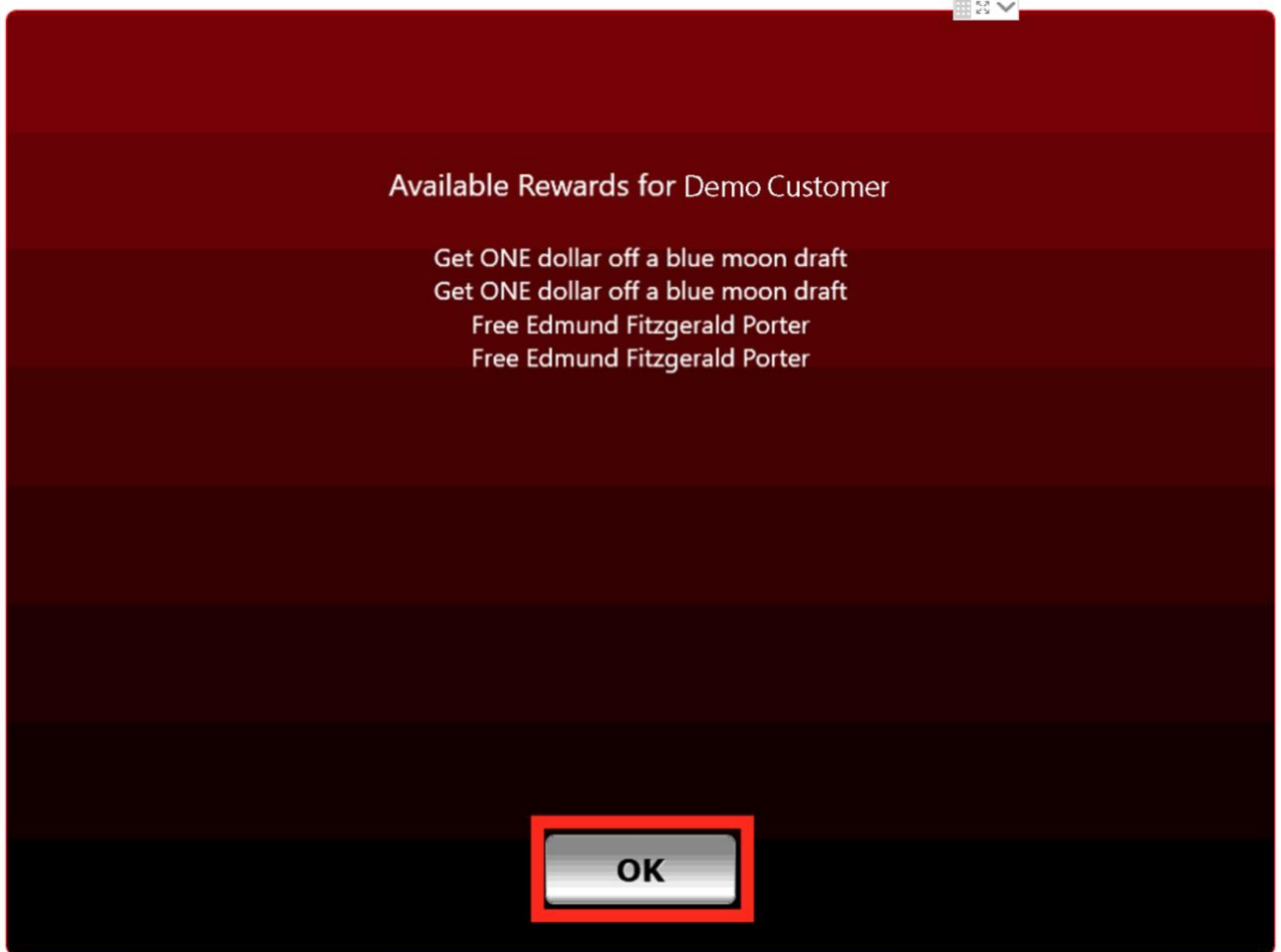2. Now select **Assign Loyalty ID** within the Loyalty window.
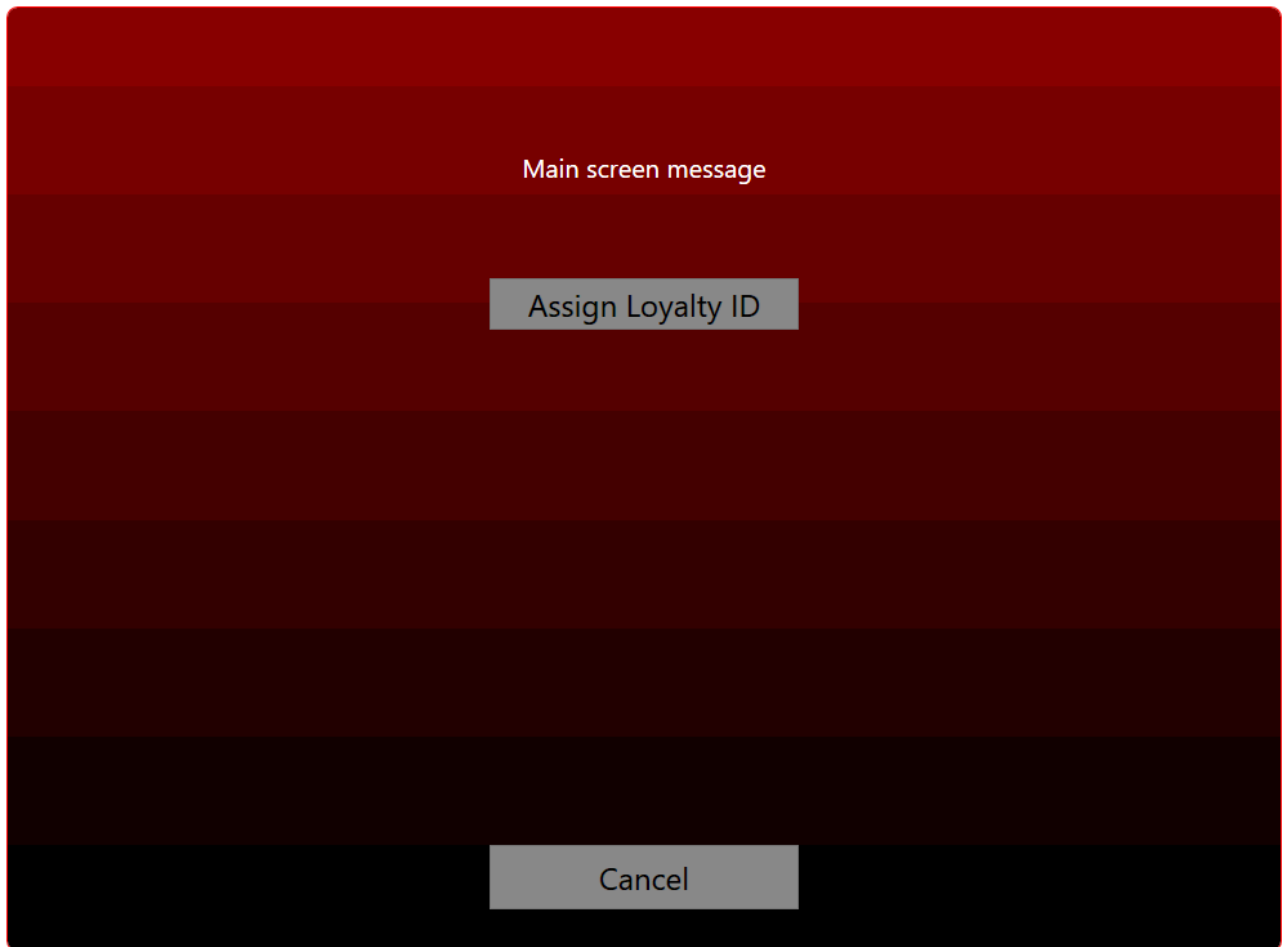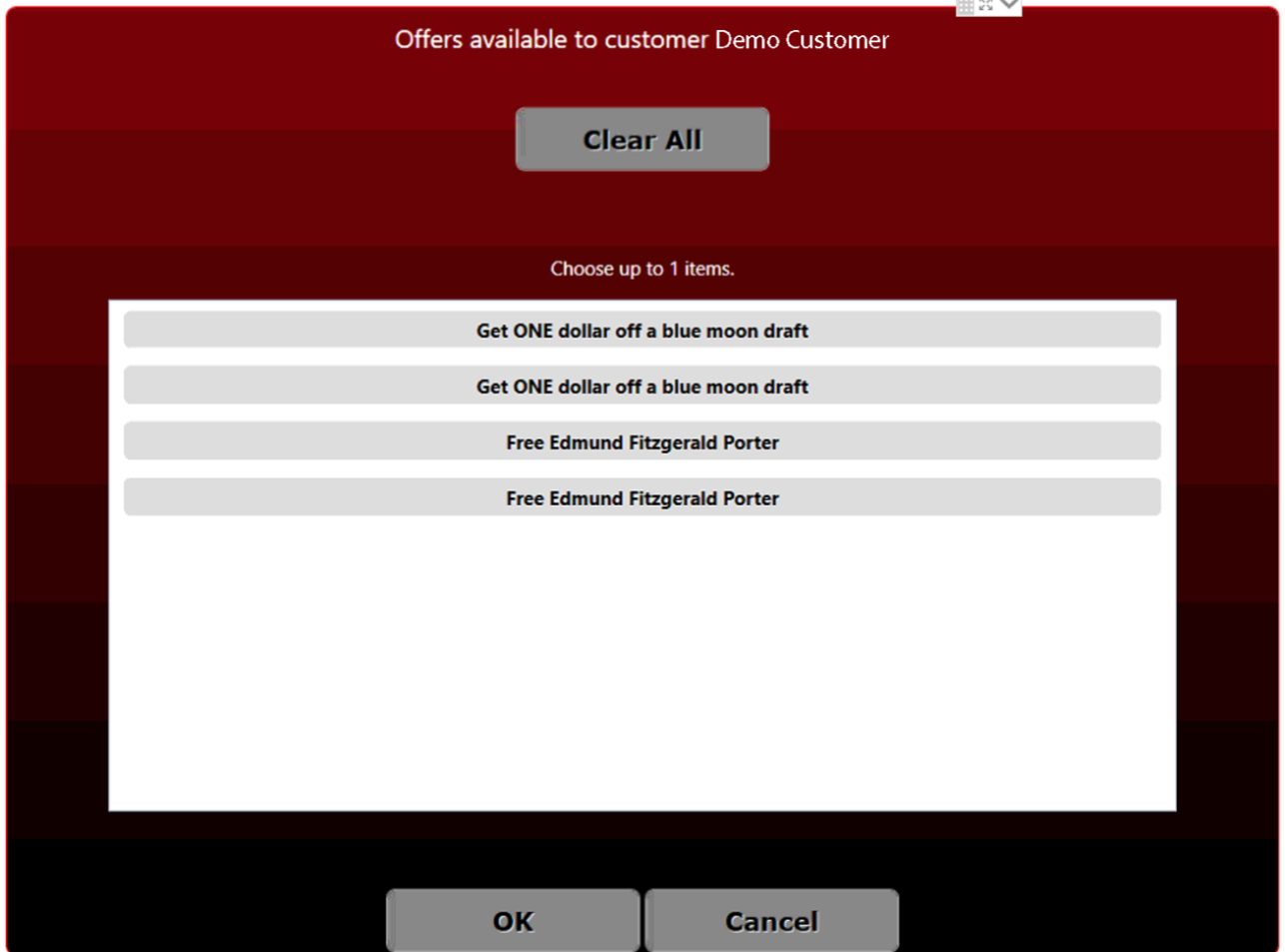

The Loyalty Card screen displays.

3. Depending on available equipment, you can now **key/scan/swipe the customer's loyalty credentials** and click **OK** to submit the customer's ID to the loyalty provider. Supported options for customer Loyalty IDs include SessionM User ID (UUID) and SessionM External ID (Non-UUID String).
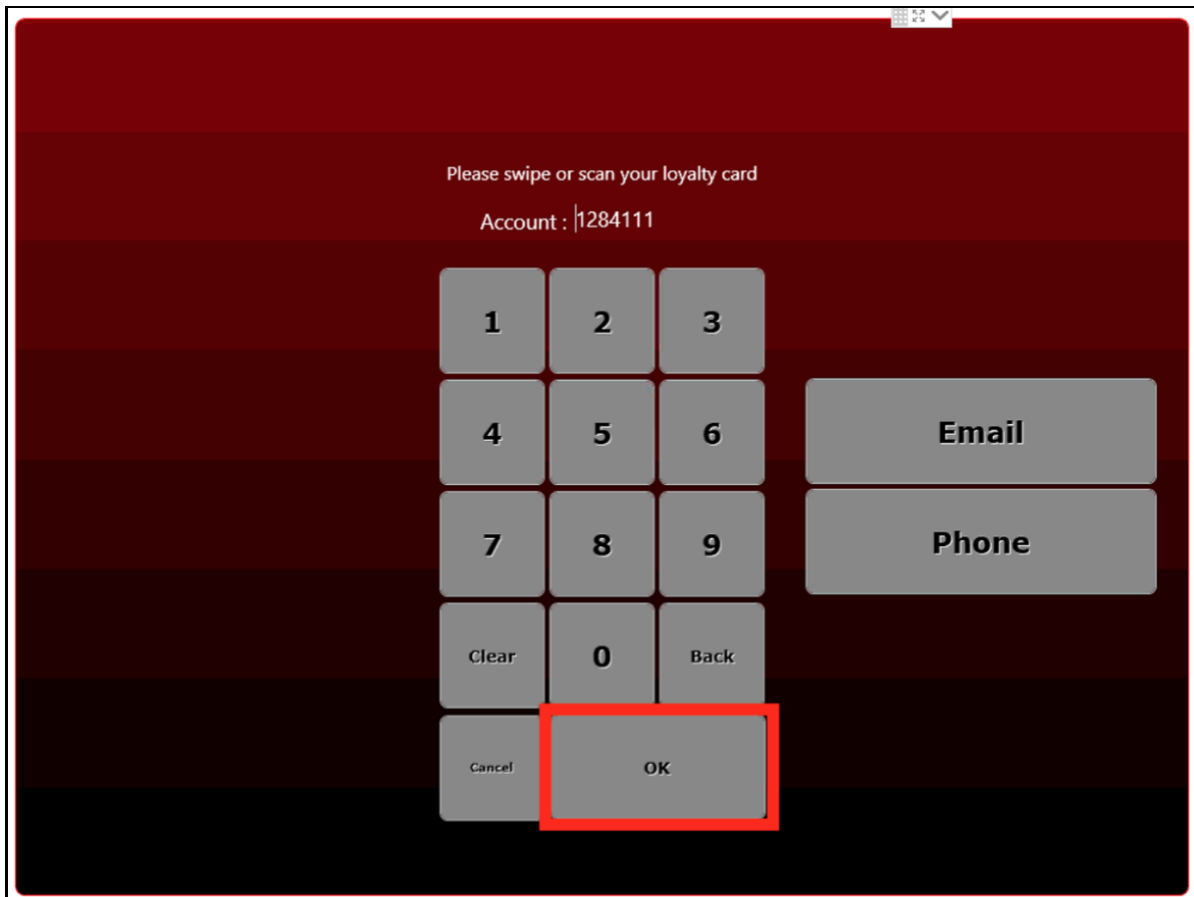
If there is a successful match, the customer's rewards wallet displays on screen as a notification - provided that rewards are available and they apply to the current order.

4. Press **OK**. If offers can be applied to the check, the following screen appears:

Offers available to customer Demo Customer

Clear All

Choose up to 1 items.

Get ONE dollar off a blue moon draft

Get ONE dollar off a blue moon draft

Free Edmund Fitzgerald Porter

Free Edmund Fitzgerald Porter

OK   Cancel

5. You can **select and apply a single loyalty offer** for the transaction. Then press **OK**. Note that you can also bypass this step by pressing Cancel or OK without an offer selected.

If a customer has been successfully assigned to the check, the customer's SessionM Loyalty ID and name are present at the top of the check, as outlined below:
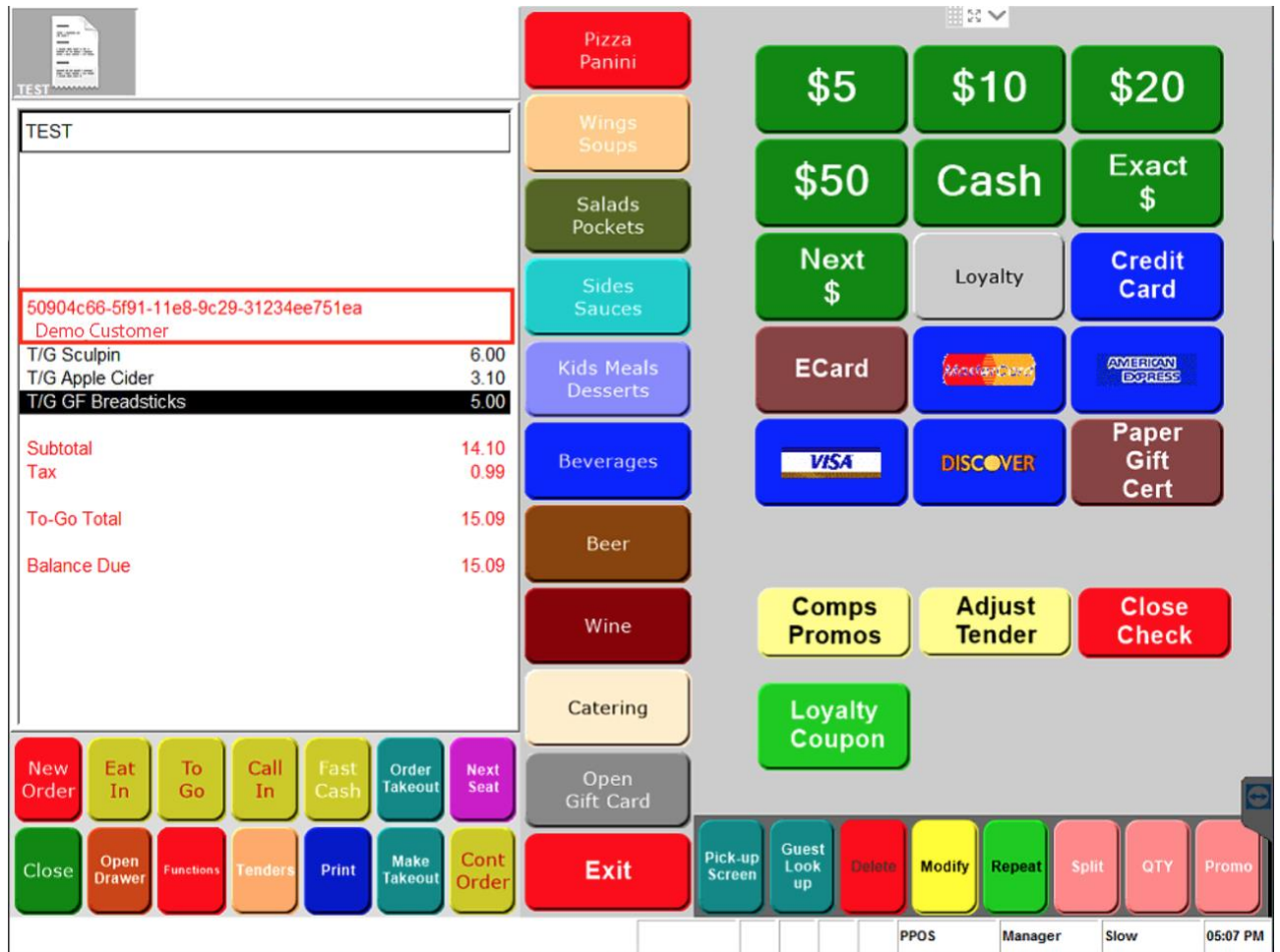
If the Loyalty ID that has been submitted by the cashier/server is not found in the SessionM Loyalty database or an improper lookup type (phone/email) was entered into the Loyalty ID prompt, an error is returned to the cashier/server.

Account Status: INVALID
Message:

OK
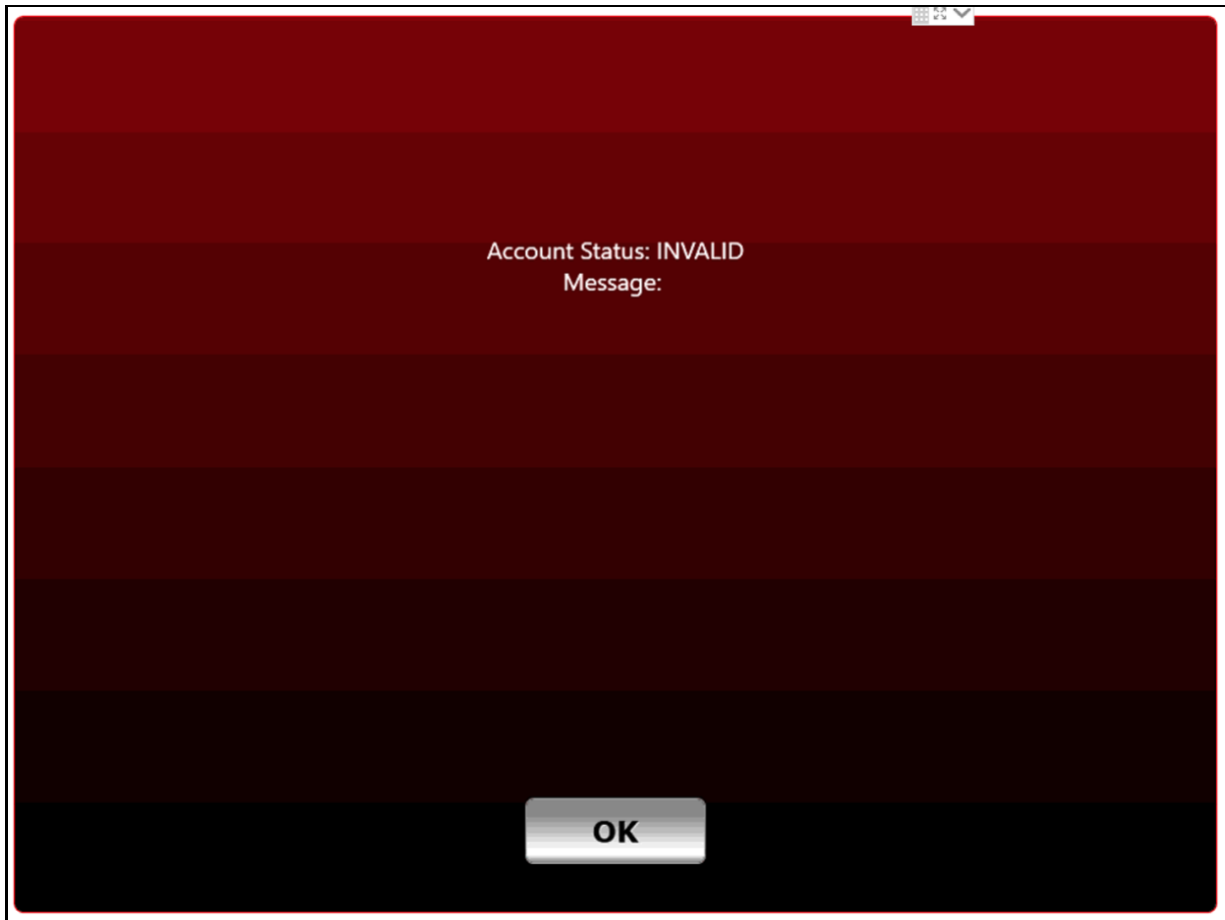
If the error shown above displays, try a different loyalty ID or an alternative lookup method.

If the application of a customer to the check via Loyalty ID is unsuccessful due to a connectivity problem, the Loyalty ID will be appended to the top of the check as entered and the text "Offline User" will be shown. Reasons for unsuccessful customer application could be either of the following:

- Connection between POS and NCR BSP could not be established

- Connection between NCR BSP and SessionM could not be established

In an offline scenario in which SessionM can't be reached but a successful unique loyalty ID has been added to the check as an Offline User, this transaction will be attributed to the correct customer once connection is re-established and it is processed by SessionM.

Assigning Customers by Phone Number or Email Address

After adding items to the check, you are ready to begin assigning customer by phone number or email address.

1. On the Tenders screen, press **Loyalty**, which is outlined in red.
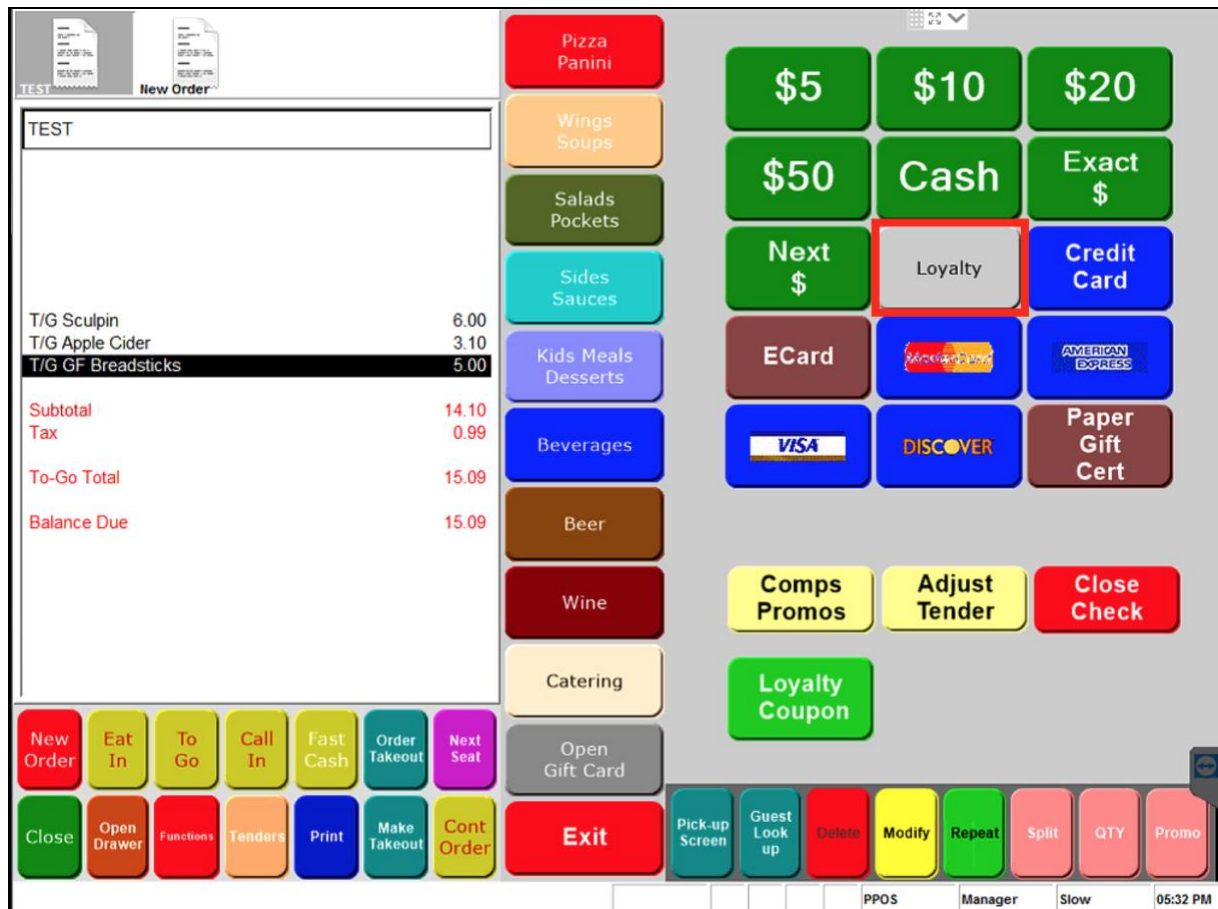
Note that while the Loyalty button is located in the recommended location, it can be placed in a different location or given a different name based on the button configuration instructions included in NCR's Feature Focus guide.

2. Now select **Assign Loyalty ID** within the Loyalty window.
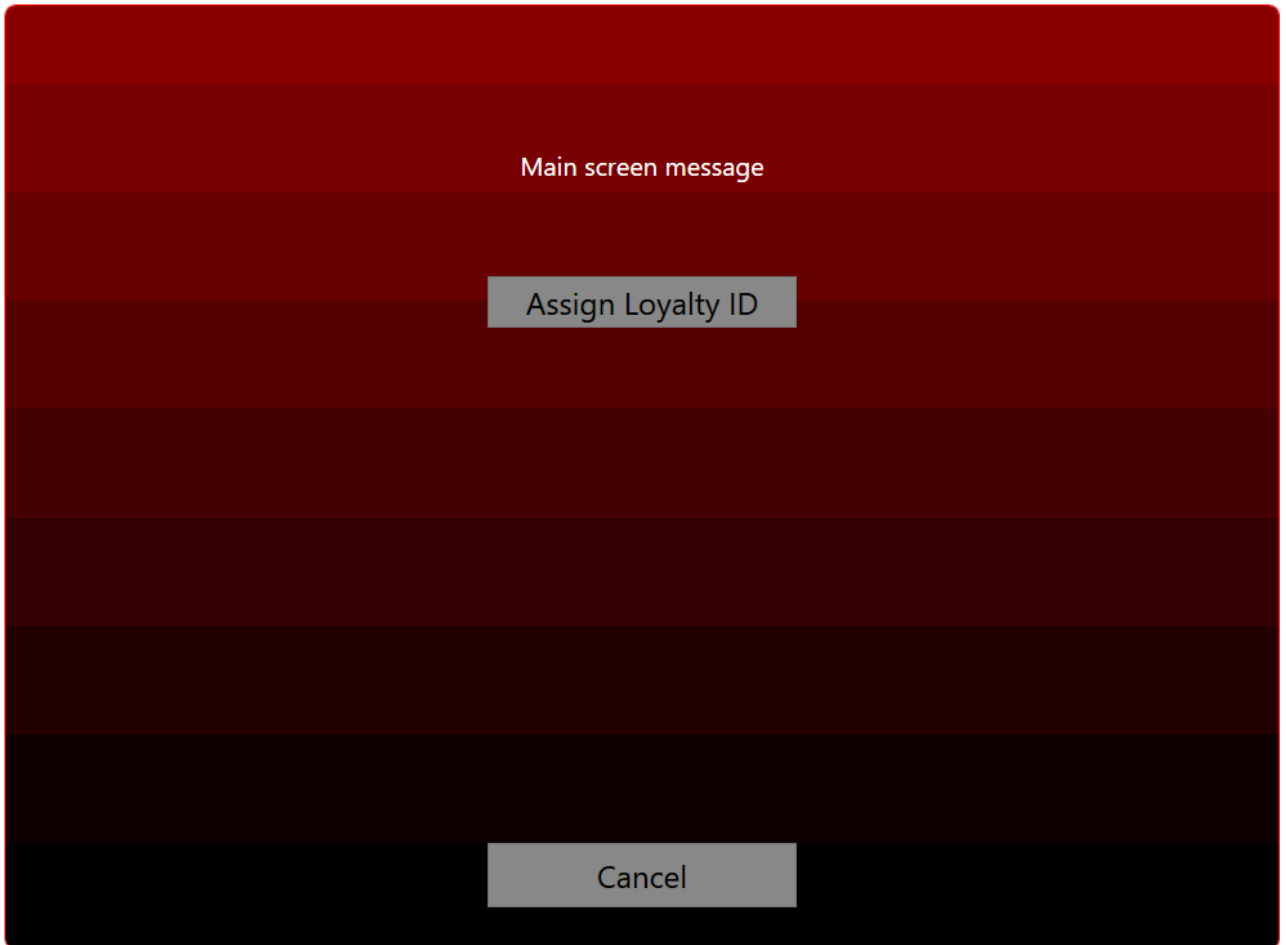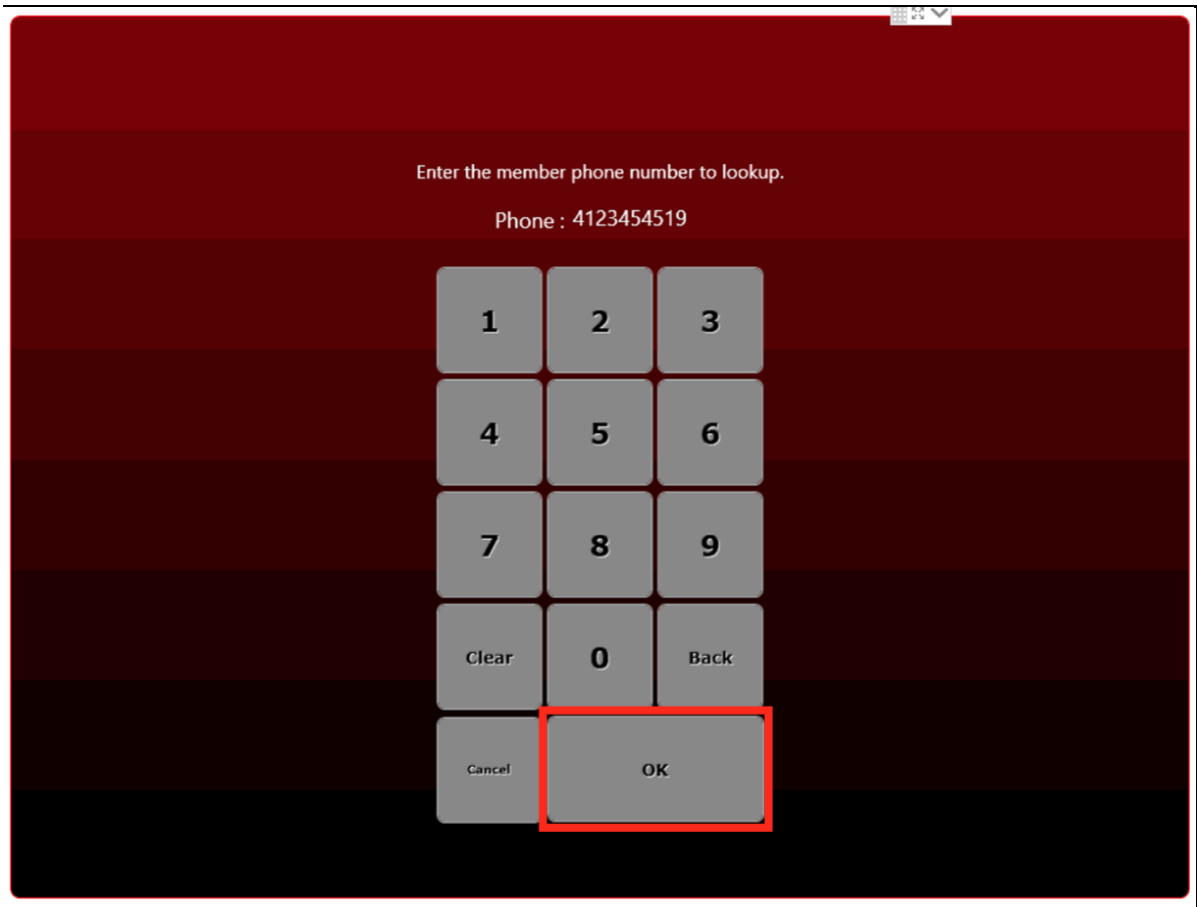

The Loyalty Card screen displays.

3. Depending on how you want to assign a customer, press either **Email** or **Phone**, both of which are outlined in red. As a note, it is essential to train cashiers that the proper type (Email, Phone, Loyalty Card) must be chosen for the value provided by the customer as the integration is unable to intelligently decipher the value type if entered into the wrong prompt.
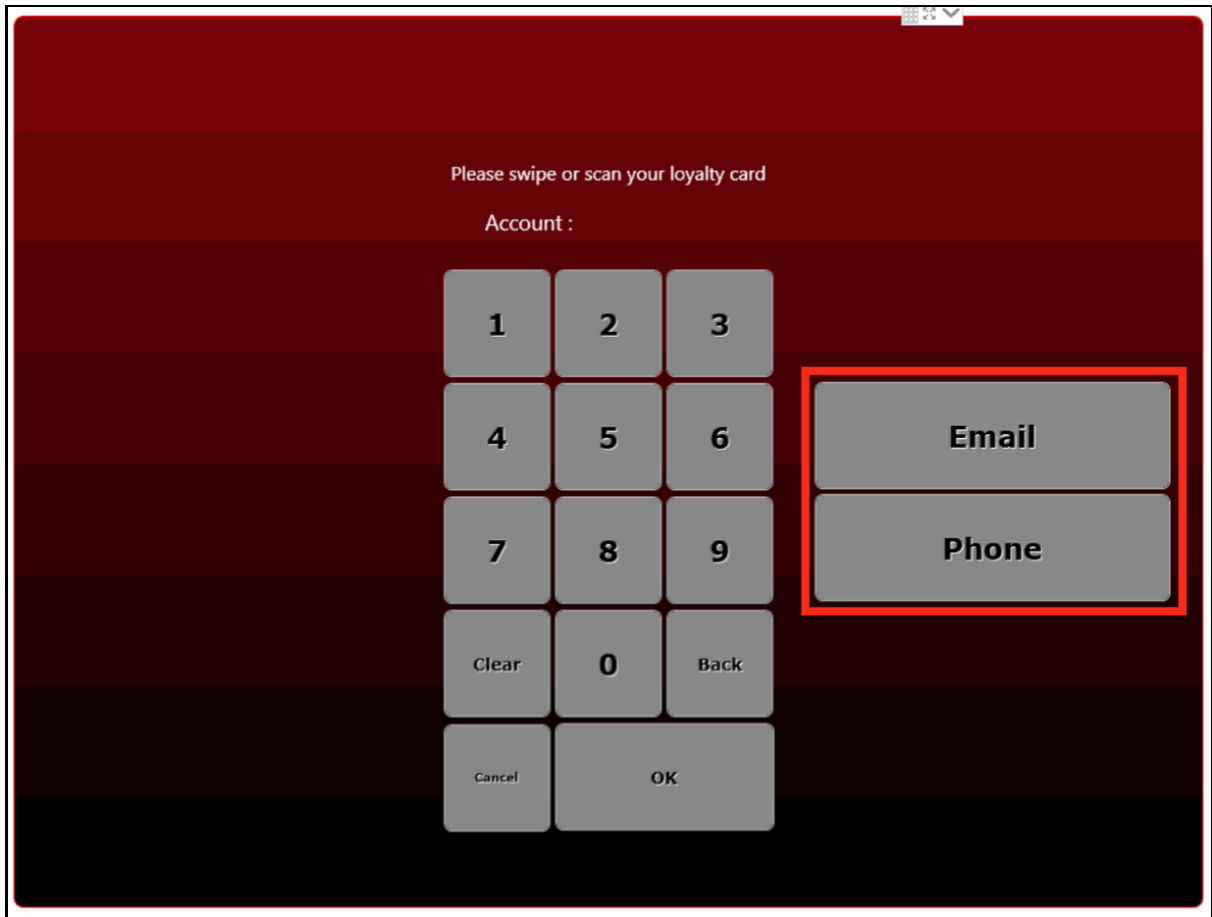
Depending on which button was pressed, the system opens a window for entering a value by which to search for a customer. (For emails, the entry pad is alphanumeric; for phone numbers, the entry pad is numeric.)

Note that the remainder of the procedure features screen shots that support a phone search.

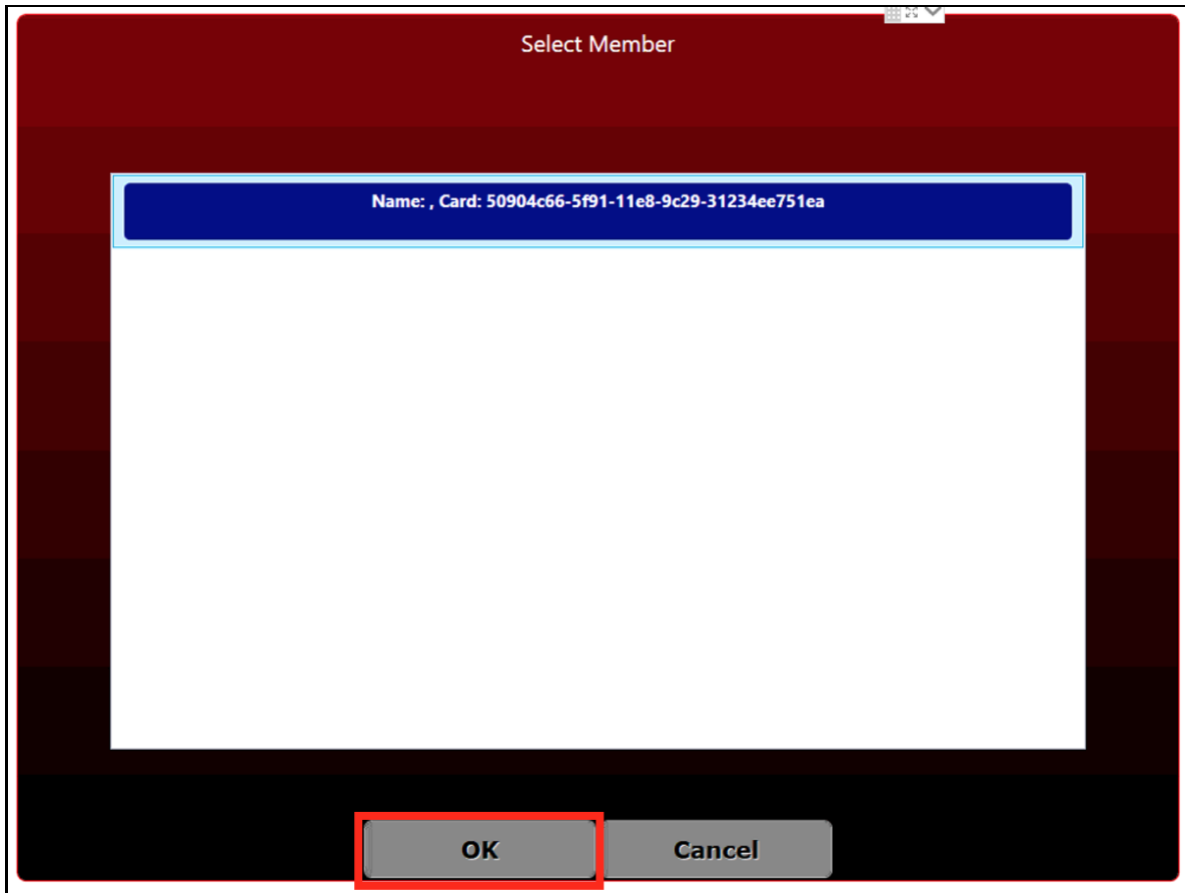4. Enter an email or phone number on the screen and press **OK**.

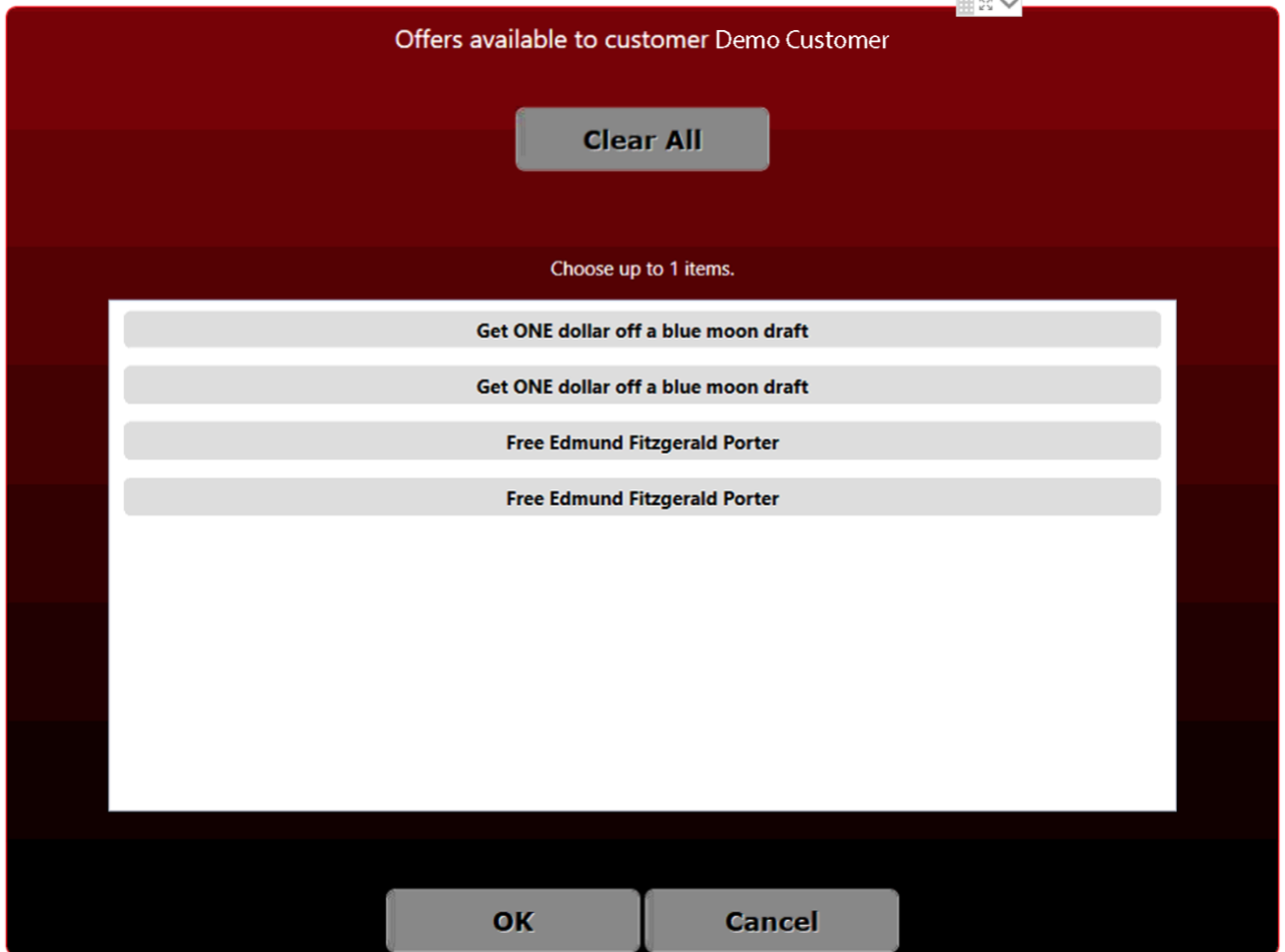Once entered, the value is sent to the SessionM Platform to attempt matching the value to a loyalty customer record. If there is an exact match, the customer name and SessionM Loyalty ID are displayed in the Select Member screen.

Select Member

Name: , Card: 50904c66-5f91-11e8-9c29-31234ee751ea

OK   Cancel

5. If this customer info matches for the customer who provided the phone number, select the customer and press **OK**. The customer's rewards wallet then displays as an onscreen notification (providing rewards are available).
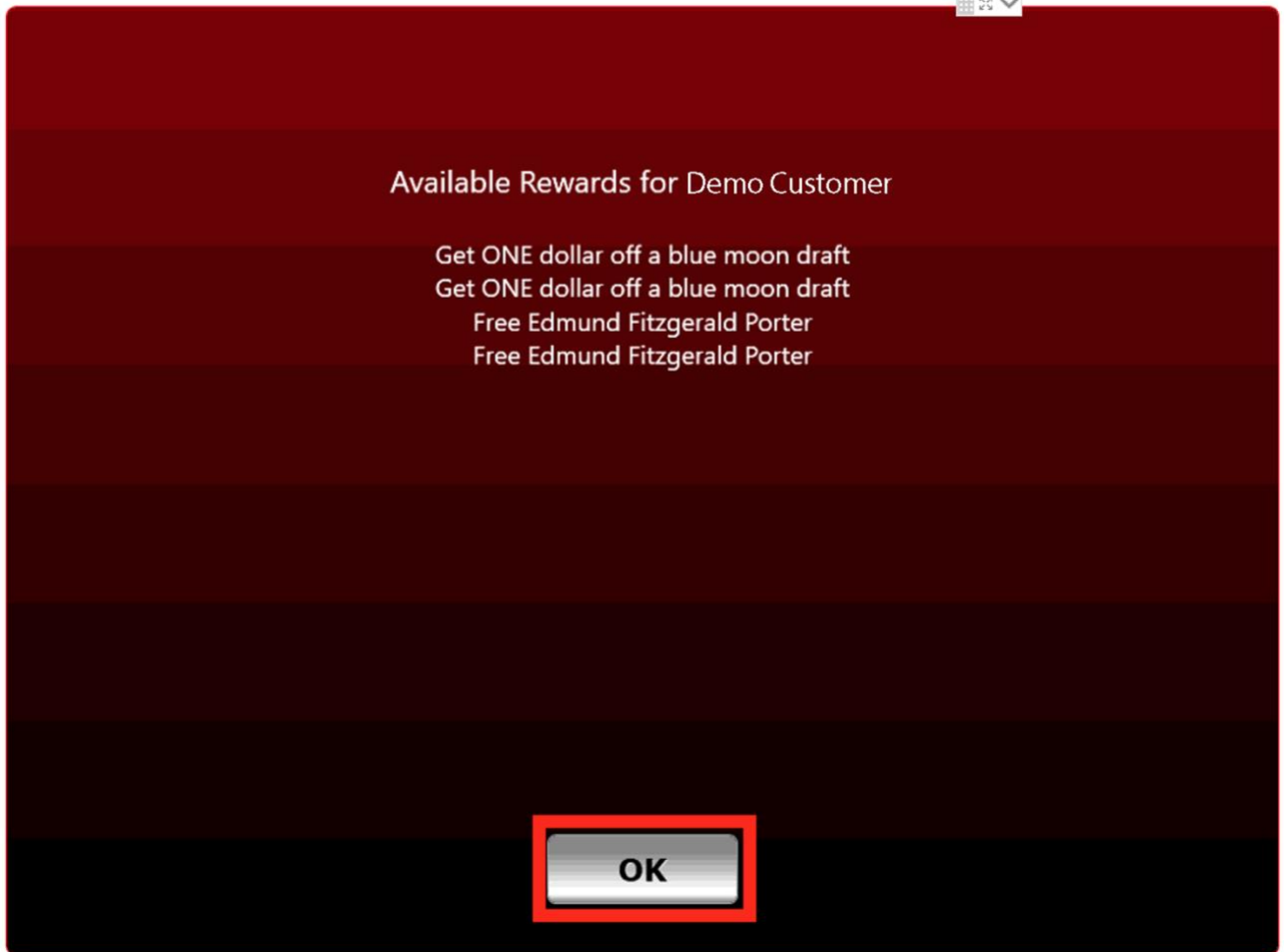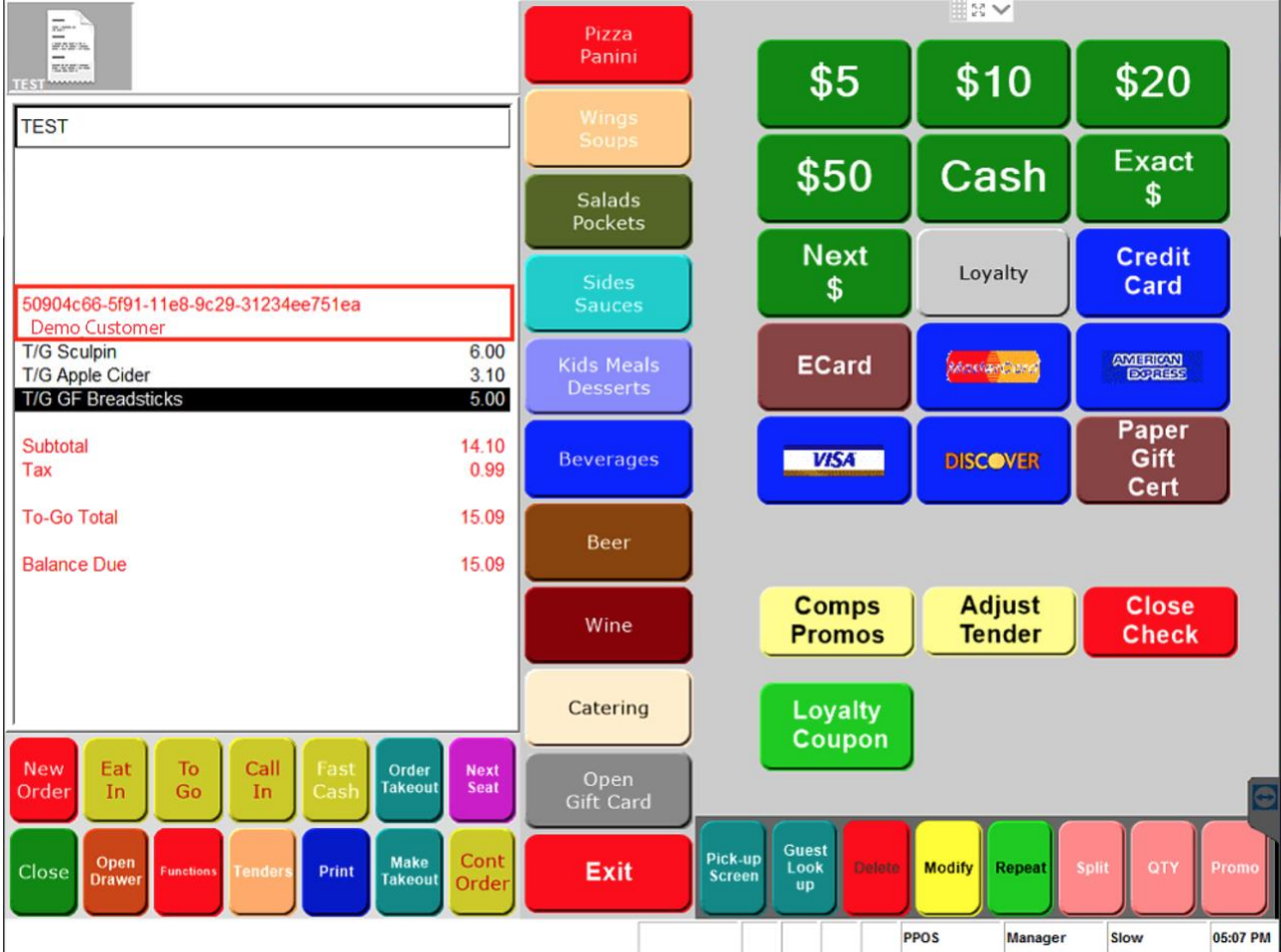
6. Press **OK**. If offers can be applied to the check, the following screen appears:

7. You can **select and apply a single loyalty offer** for the transaction. Then press **OK**. Note that you can also bypass this step by pressing Cancel or OK without an offer selected.

   If a customer has been successfully assigned to the check, the customer's SessionM Loyalty ID and name are present at the top of the check, as outlined below:

If the assignment of a customer to a check via phone number or email is unsuccessful, the POS returns a "No records found for search" message:
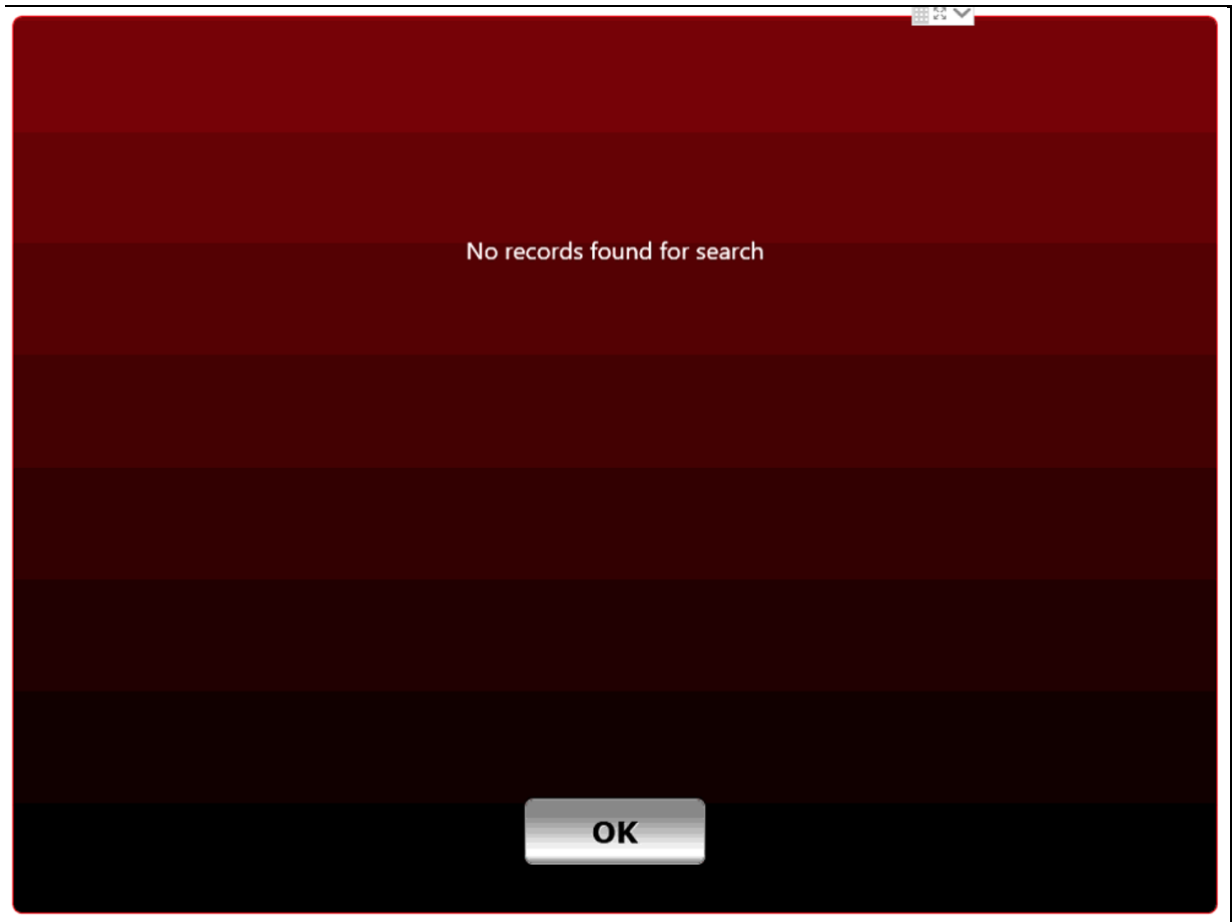
Reasons for this message include:

- Phone number/email not found in the SessionM Loyalty database.
- Loyalty provider could not be reached.
- Duplicate values with the same phone number/email have been found in the SessionM Loyalty database.

8. Press **OK** to complete the task.

Alternate Customer Assignment Flows

While customer assignment is most typically performed and recommended at the conclusion of the transaction, it can also be performed at the beginning or in the middle of the transaction.

Loyalty Assignment Before Items are Ordered

If a successful loyalty assignment is performed **before** items are ordered, the cashier/server will be shown the customers rewards wallet (if available) as a notification, which provides an opportunity to inform the customer of rewards that could be applied to the transaction after qualifying items are ordered.
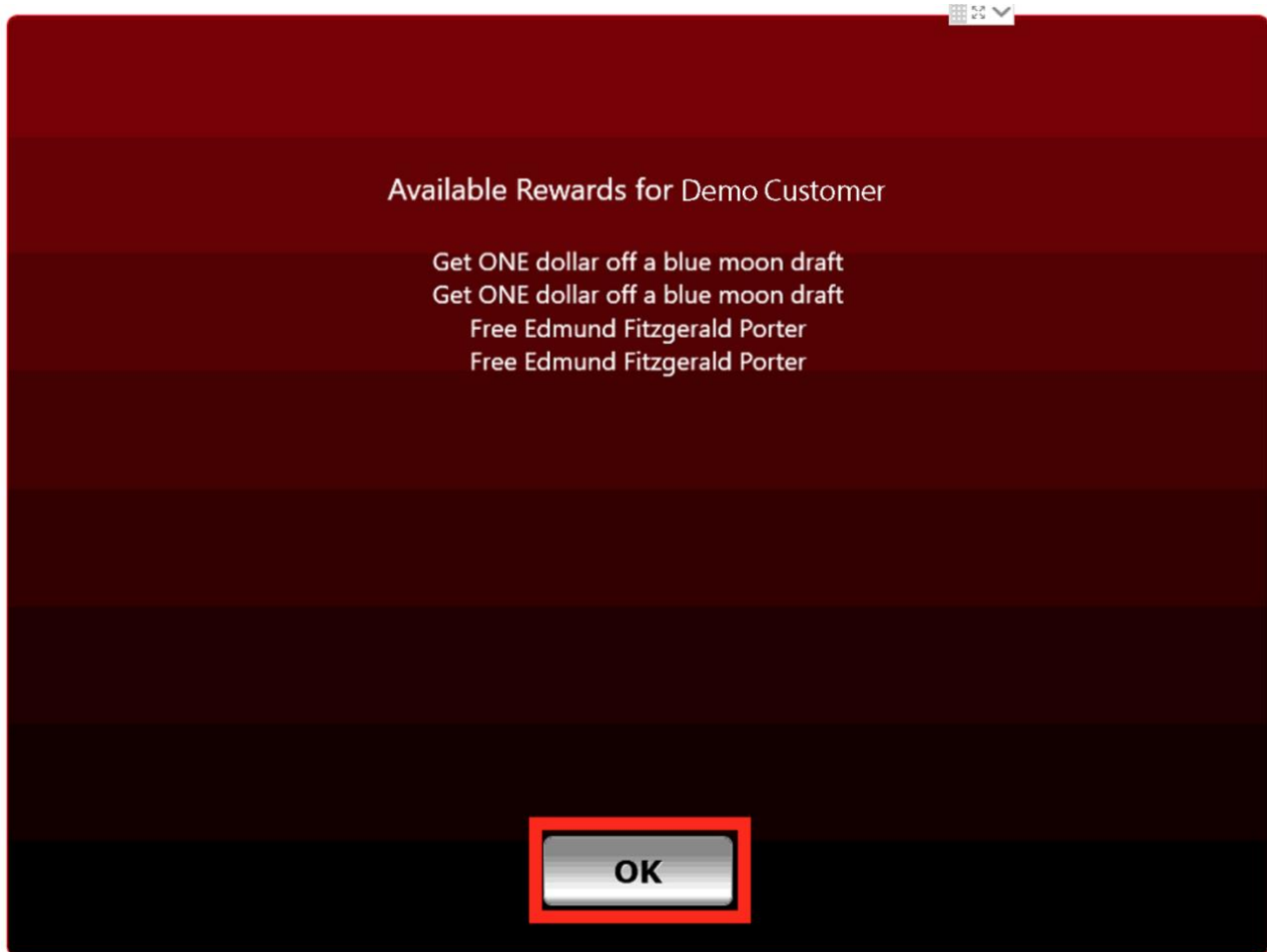
The ability to select and apply an offer is not presented to the cashier/server until the items have been ordered and an order mode is selected. Upon order mode selection, if offers are available they are then presented to the cashier/server. While order mode buttons can vary on a client-by-client basis, the order mode options from the SessionM Lab POS are shown below outlined in red:
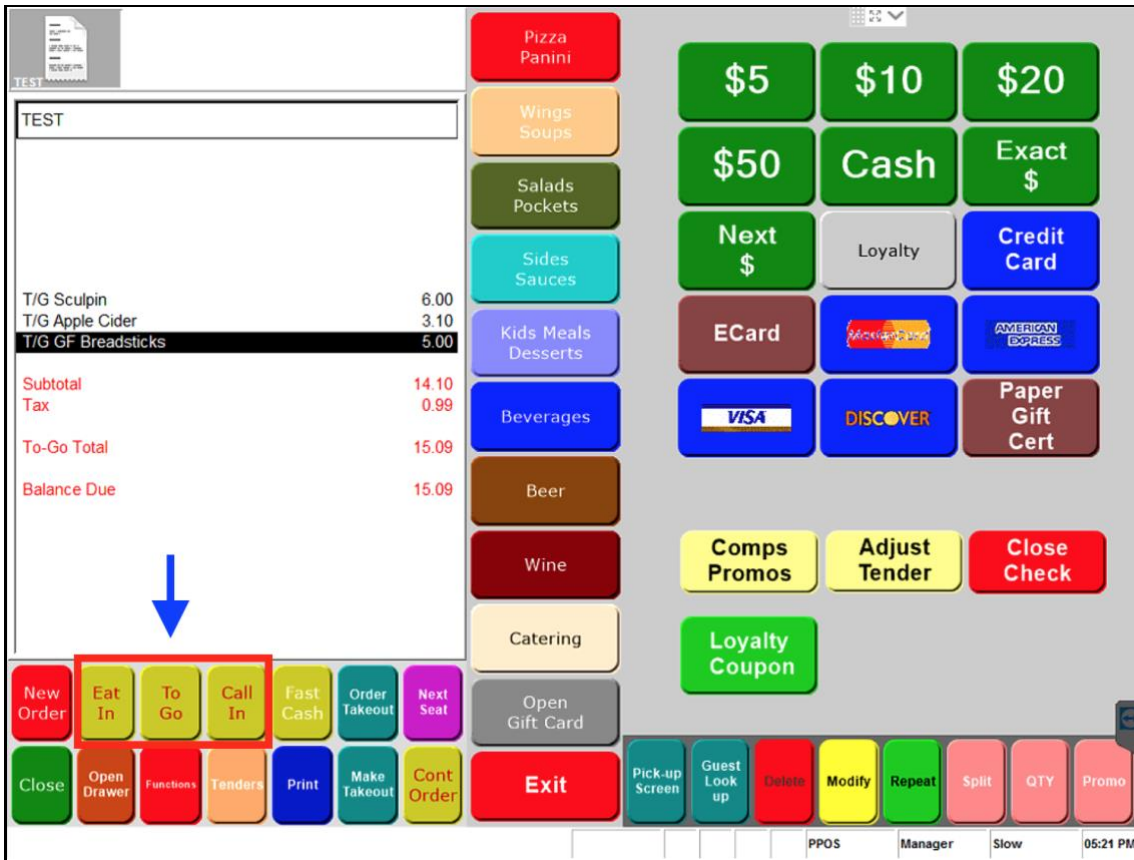
Loyalty Assignment During or After Items Being Ordered

There may also be scenarios in which a customer is assigned to a transaction while item ordering is still in progress, or a customer has decided to add additional items to an existing order after loyalty has been assigned. In this scenario, offers will be available for application to the check upon customer assignment and will reappear to the cashier/server under the following circumstances:

- If an offer has **not yet been applied** to a check when the additional items are ordered (post loyalty assignment) and offers are available, the Offer Application screen will reappear when the new items have been confirmed via order mode selection.

- If an offer has **already been applied** to a check with the additional items are ordered, the offer will be removed from the check and can be reapplied (or a different offer can be selected) via the Offer Application screen upon confirming the items via order mode selection.

Loyalty Offer Redemption

The SessionM Loyalty integration to NCR BSP includes offer and discount based functionality at the point-of-sale in order to enable customers to use offers that they have acquired by being a member of the loyalty program. To use loyalty offers at the POS, the loyalty offers need to be configured within the Offers Module of the SessionM Platform and possessed by the customer (in customer's offer wallet). The SessionM BSP integration supports the redemption of offers owned by a customer but does not support any methods by which the customer can acquire an offer that is not already in their wallet at the POS.

It is also important to note that loyalty offers differ from other in-store promotions or POS comps. Bulk or anonymous coupons should continue to be used via existing POS or offer management channels. However, while loyalty and non-loyalty offers can be combined in a single transaction, this is not recommended.

There are two methods for customers to redeem a loyalty offer within a transaction:
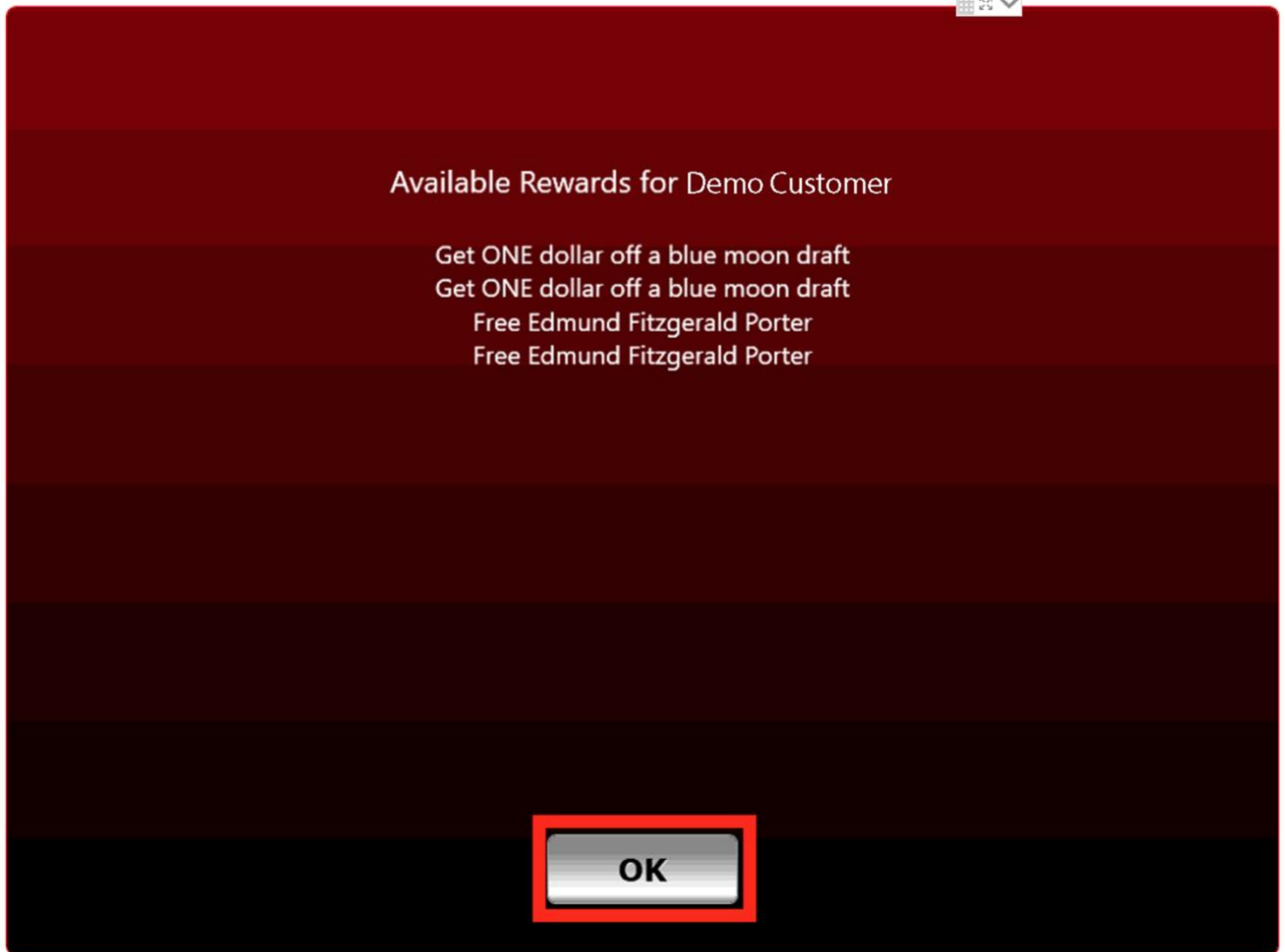
- Via cashier/server application from on-screen offer wallet.
- Via loyalty offer code shown by customer to cashier/server.

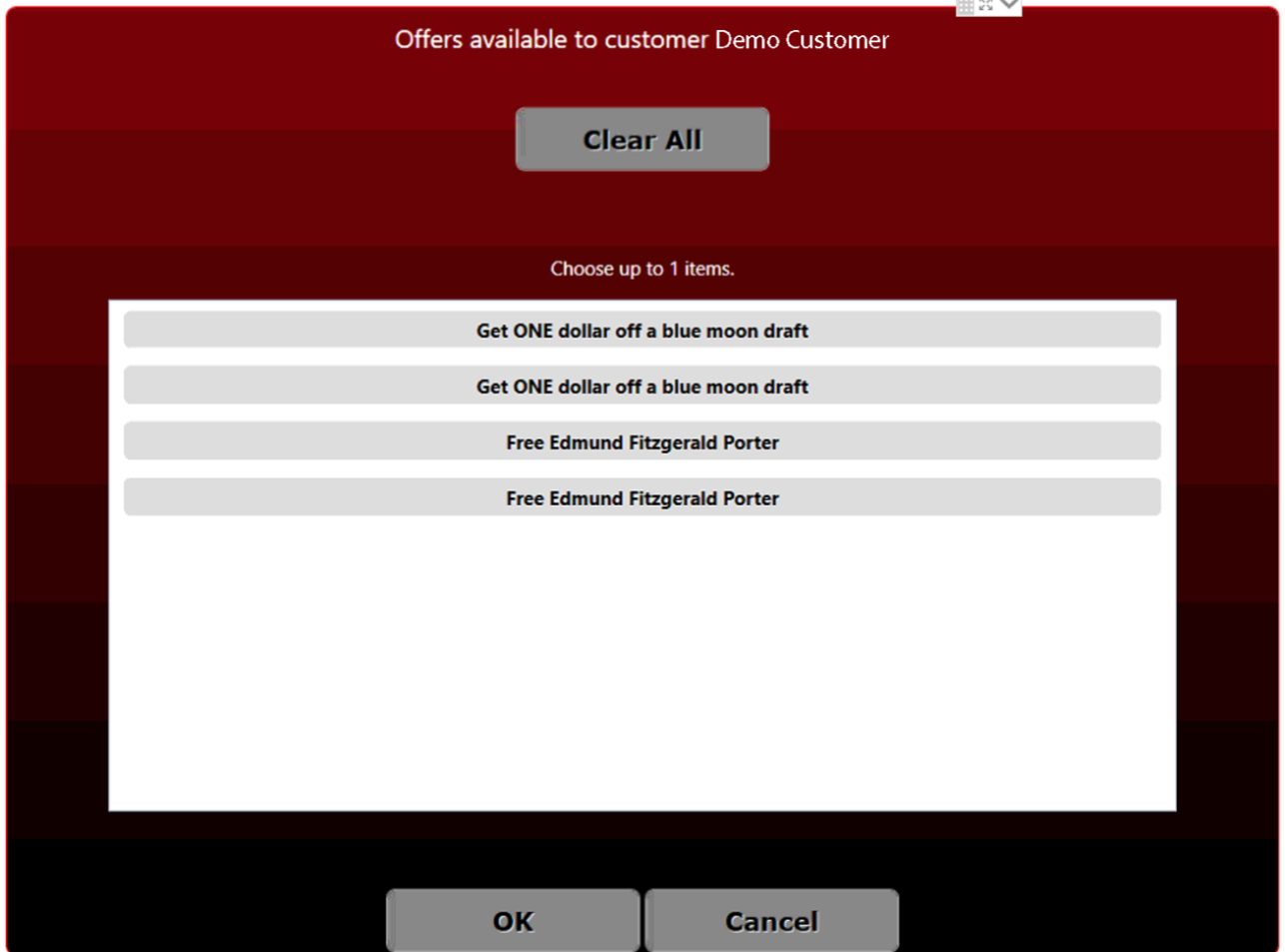Both methods of loyalty offer application are shown below.

Redeeming a Loyalty Offer via On-Screen Offer Wallet

When a loyalty customer has been assigned to the check (shown in previous section), there is an opportunity to for the cashier/server to apply a loyalty offer to the transaction without requiring a physical or digital offer code from the customer.

1. If items have not yet been ordered by the customer upon assignment to the check, a notification screen is shown to the cashier/server that informs them of available offers that could be applied once items are added:

Available Rewards for Demo Customer

Get ONE dollar off a blue moon draft
Get ONE dollar off a blue moon draft
Free Edmund Fitzgerald Porter
Free Edmund Fitzgerald Porter

OK

2. Press **OK**. If a loyalty customer has been assigned, items have been ordered, and the order mode has been selected, loyalty offers are presented to the cashier/server for application redemption of a **single offer** against the check:

Note that if items exist on the check, the list of offers shown to the cashier/server are filtered by SessionM to be only the offers that are eligible to be applied to the specific open transaction. Additional offers in the customer's wallet are not shown to the cashier/server in order to prevent erroneous application of non-eligible offers.

3. You can **select a single loyalty offer** to be applied to the check. Then press **OK**. Note that you can also bypass this step by pressing Cancel or OK without an offer selected.

If an offer is successfully applied to the check, the related discount is shown on the check between the ordered items and the subtotal. The title of the discount can be altered by following the instructions in NCR's Feature Focus Guide with the POS Comp and Promo sections. The applied discount is shown below:

If the discount was unable to be applied to the check, the loyalty offer selection screen disappears, no discount is shown on the check image, and any order totals remain unadjusted. Reasons for failure to apply a discount to the check include:

- The offer is no longer available (expired or used by customer via another channel).
- The offer does not apply to items/totals on the check.
- A connection to SessionM could not be made during the time of offer redemption.

Redeeming a Loyalty Offer via Keyed/Scanned Offer Code

If configured for a client's specific use case, the SessionM/BSP integration includes the ability to enter a loyalty offer code that is shown by a customer for receipt of a discount off of the current transaction. Note that a cashier/server should undertake this action once the customer has completed ordering items for the applicable transaction and the order mode has been established for all items.

1. On the POS screen, press the Loyalty Coupon to transmit the code to SessionM for validation and discount calculation, as shown below outlined in red:
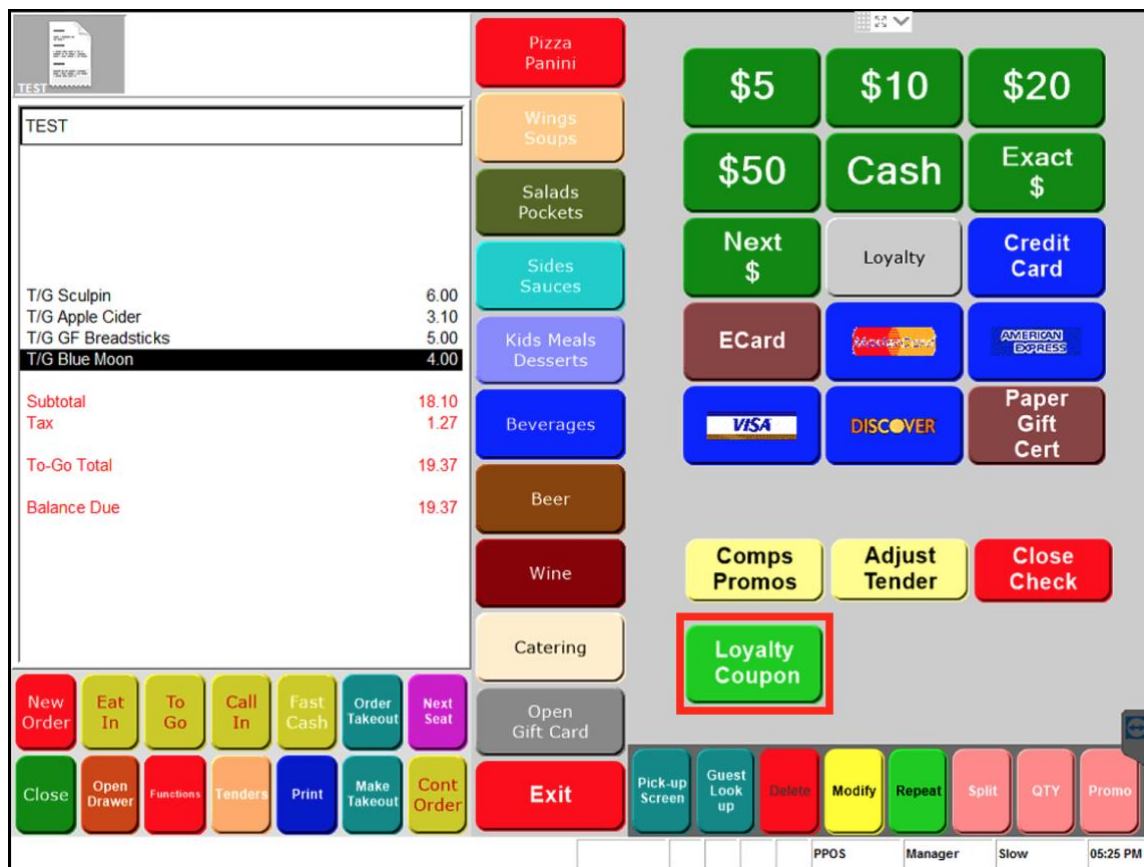
The Loyalty Coupon Entry prompt screen opens.
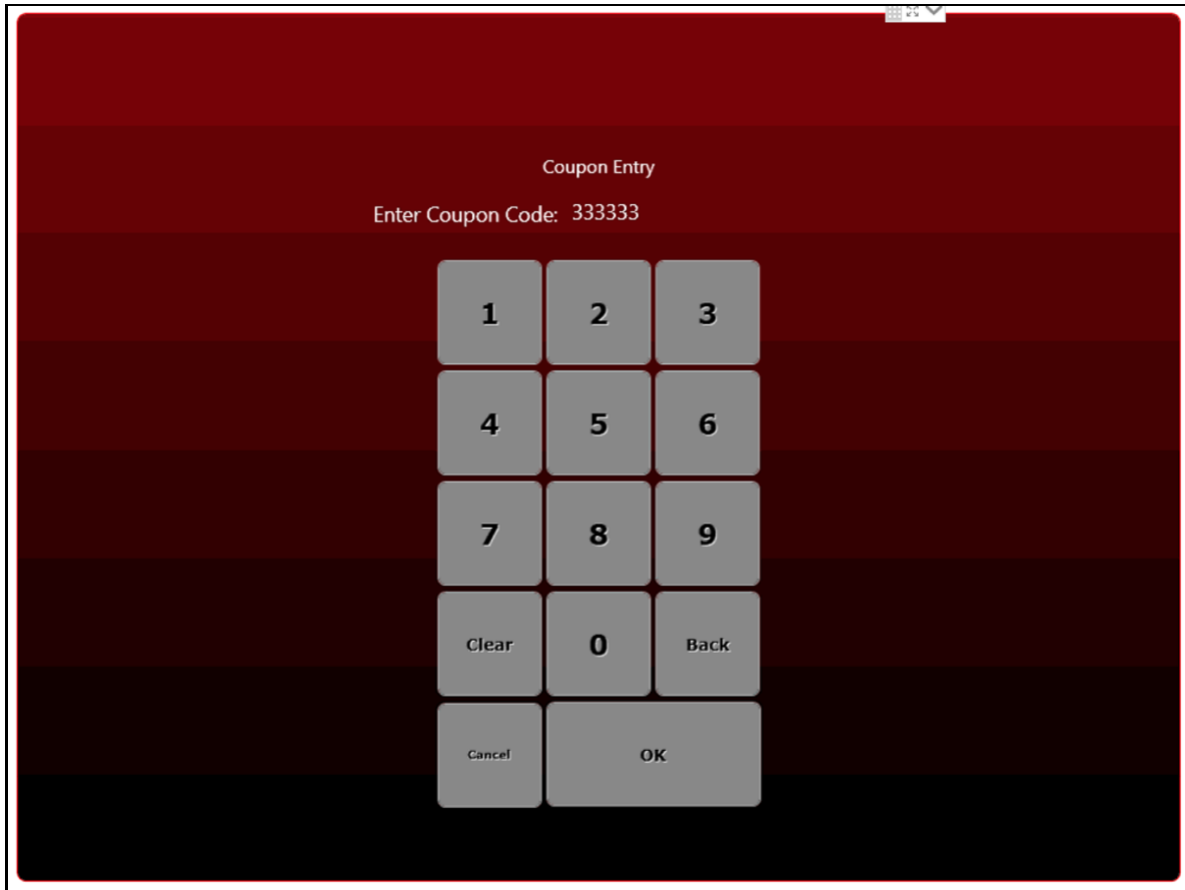
2. Enter or scan the loyalty coupon code and press **OK**. Acceptable values for loyalty coupon entry include a SessionM User Offer ID or dynamically generated short length TTL code. If a loyalty coupon code is successfully entered and applies to the items currently on the check, the applicable offer is shown to the cashier/server for confirmation:
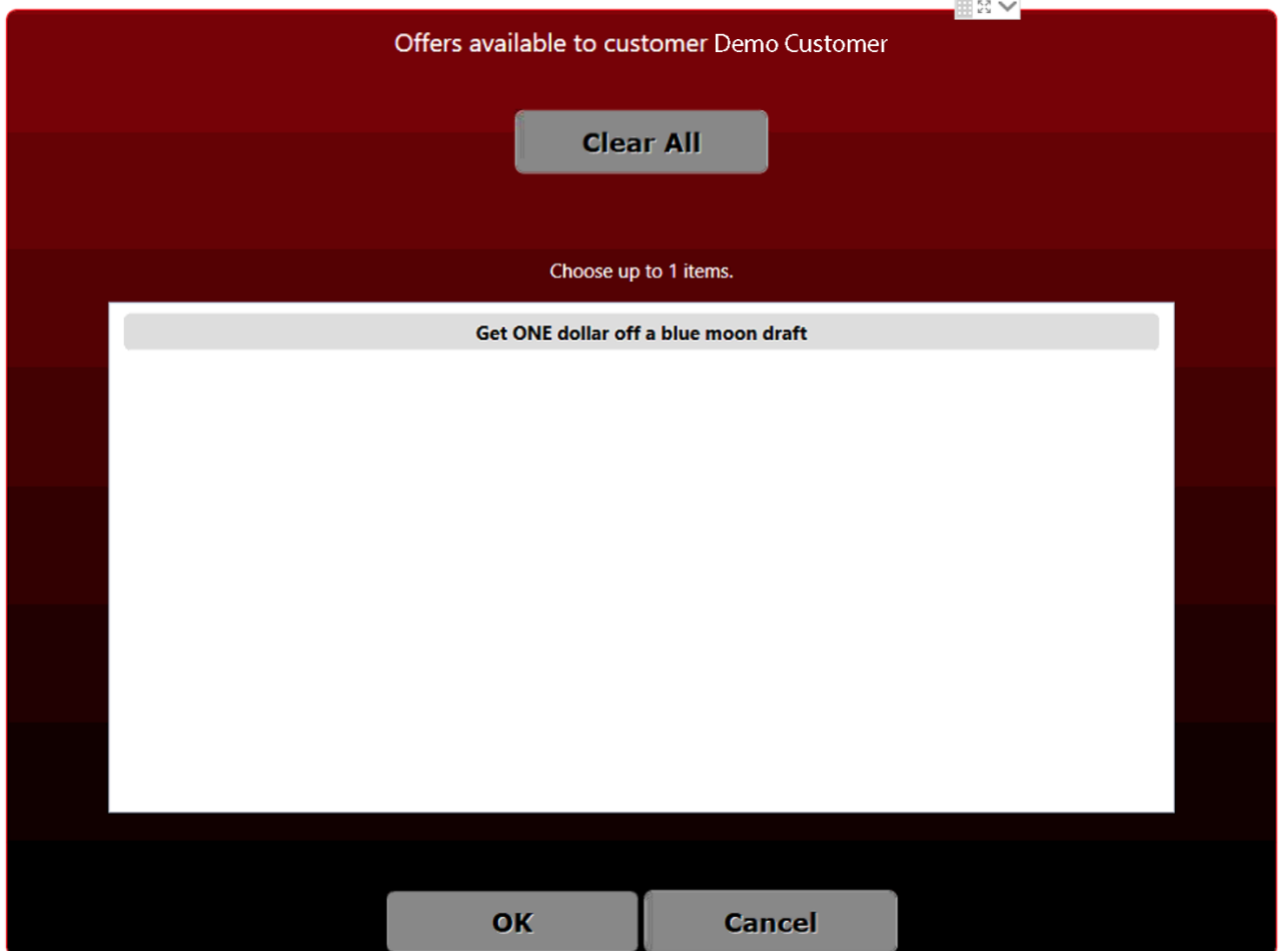
Note that if a loyalty code is entered with no items on the check, the offer code is locally cached and not transmitted to SessionM for validation until items are ordered and the order mode is selected.

3. You can **select and confirm the single loyalty offer** to which the offer code is associated. Then press **OK**. Note that you can also bypass this step by pressing Cancel or OK without an offer selected.

Upon confirmation of the offer by the cashier/server, it is validated by SessionM and the discount is applied to the check. You can see that a loyalty offer has been successfully applied to the check if the discount is shown on the check between the ordered items and the subtotal, as shown below outlined in red:
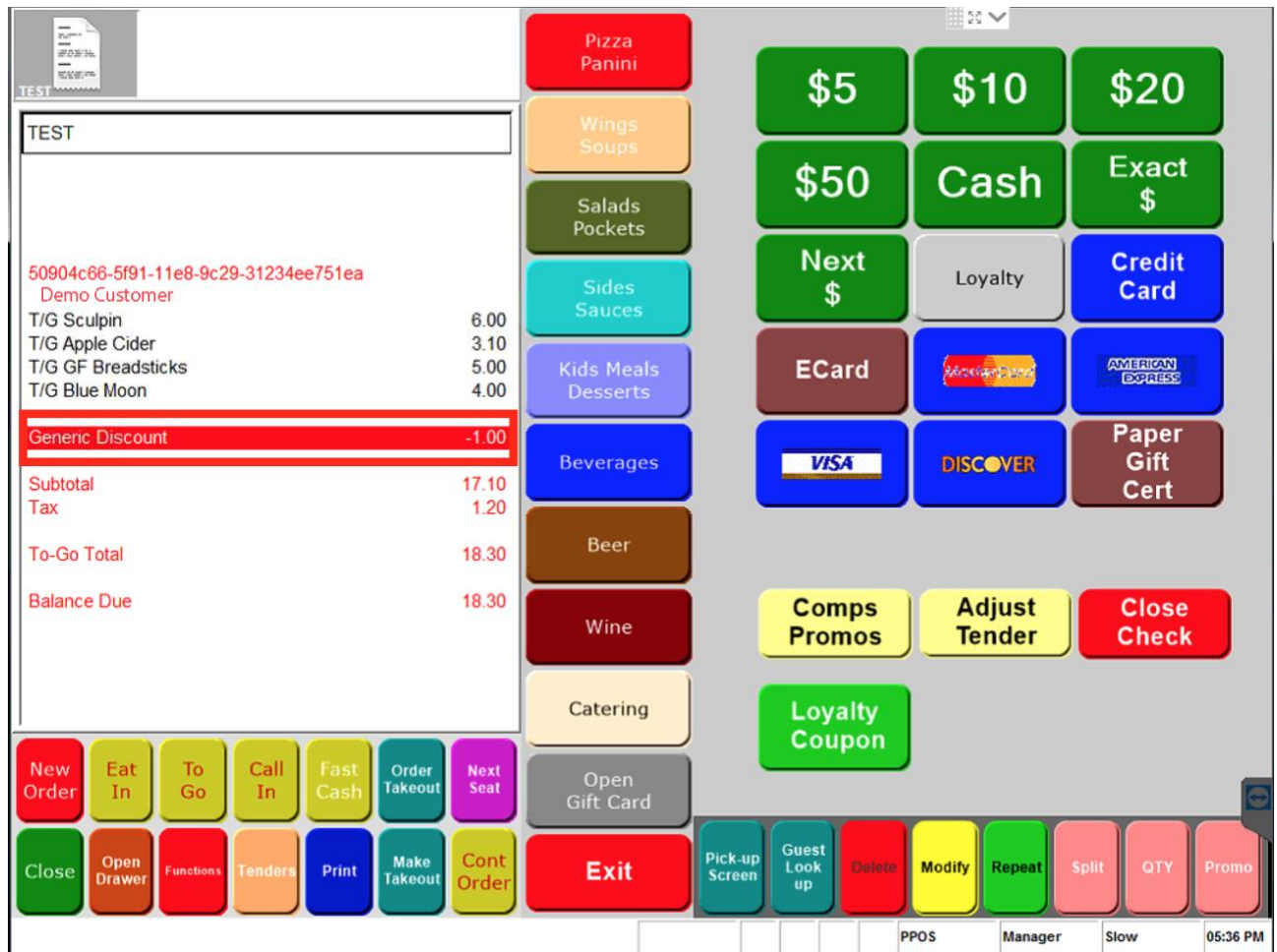
Note that the title of the discount can be altered by following the instructions in NCR's Feature Focus Guide, within the POS Comp and Promo sections.

If no offer confirmation is returned and/or no discount is applied to the check after entering a loyalty offer code, the loyalty offer code application has failed. Reasons for failure to apply a discount to the check in this scenario include:

- The offer is no longer available (expired or used by customer via another channel).

- The offer does not apply to items/totals on the check.

- A connection to SessionM could not be made during the time of offer redemption.

Currently, a provided loyalty offer code (keyed/scanned) does not automatically apply a customer's loyalty information to the check for loyalty attribution. If a customer wishes to earn loyalty points from a transaction in which a loyalty offer is redeemed, the offer code must be provided, along with a method of loyalty identification (loyalty ID, phone, email).