



NCR Advanced Marketing Solution
Excentus Fuelperks! Integration User Manual

NCR Corporation
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Document Change Sheet

Revision	Date	Description of Change
A	February 15, 2011	Initial Release

Purpose

This document provides an overview of the Excentus Fuelperks! integration as supported by NCR Advanced Marketing System.

1. Acronyms and Abbreviations

RM: Excentus Reward Marketplace. The system that manages customer awards at the Excentus host system.

SV: Stored Value. An AMS type of reward, similar to points, which can be given a value.

TRB: Total Reward Balance. An Excentus RM term referring to the total fuel discount currently available to a customer.

ERB: Expiring Reward Balance. An Excentus RM term referring to the portion of the TRB that expires at the end of this month.

2. Overview of the Integration Options

Excentus supports two types of integrations to RM, a batch integration, and an online integration. For complete details on RM, please refer to the Excentus documentation. A separate document exists for each type of integration.

2.1.1. Excentus Batch Integration

In the batch integration, the retailer uses an extract process that runs periodically against the Issuance database to send earned Stored Value (SV) points to Excentus. Each SV point received by the Excentus Reward Marketplace system ("RM") is converted to a \$0.01 per gallon "fuelperks reward". RM updates the customer balances as the fuelperks rewards are used or expired. There is currently no communication of these changes back to NCR AMS, so Giant has no way to report on the customer's correct fuelperks rewards balance on the customer's receipt. Excentus has told NCR that the batch integration is supported for retailers already using this integration only. New retailers have been directed to the online integration.

2.1.2. Excentus Online Integration

In the online integration, the retailer stores request the customer's TRB and ERB from RM at the beginning of every transaction. Then, AMS calculates any new rewards earned during the transaction, updates the TRB and sends it back to Excentus. At the retailer's option, the updated TRB and ERB can be printed on the customer receipt. The retailer must have AMS release 5.11 or later to use the online integration.

3. Excentus Batch Integration

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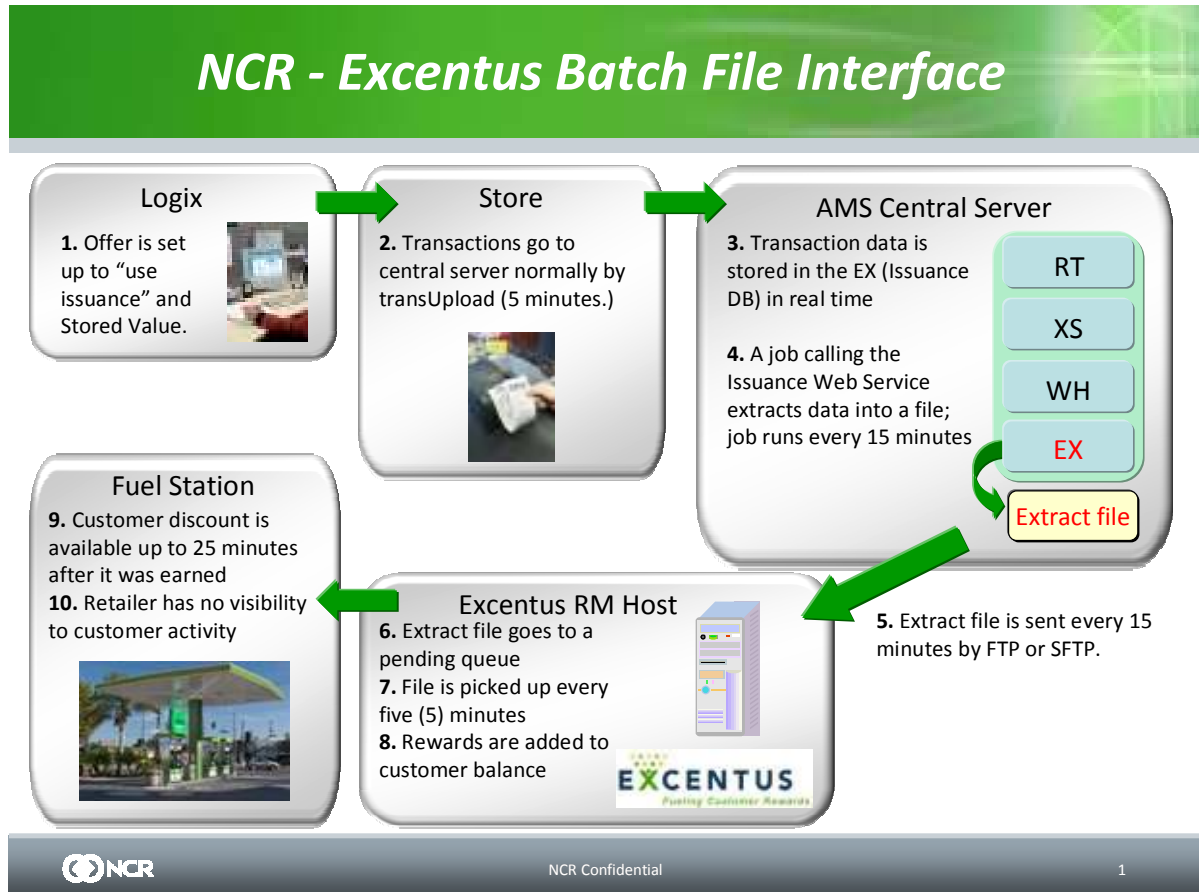


Figure 1. Excentus Batch Interface - Overview

3.1.1. Excentus Batch Integration - Instructions

1. Create Stored Value Program. In Logix, select [Programs](#) → [Stored Value](#) → [New](#)

New stored value program

Identification

Name: Excentus Fuelperks Batch Program

Description:

Expiration

Expire type: Period (days) with fixed Time Of Day

Expire period type: Days

Expire period:

Expire time of day (HH:MM): 00 : 00

General

Type: Cents off

Unit value: 0.01

☐ Allow reissue

Scorecard

Scorecard: None

Save

2. Create Offer. The offer is created with the “Use Issuance” option selected. In Logix, select [Offers](#) → [New](#) → [Enable Issuance](#).

Advanced options

☒ Auto-transferable

☐ Display on web kiosk

☐ Defer evaluation EoS

☐ Enable impression reporting

☒ Enable redemption reporting

☐ Export to archive

☒ Enable issuance ⓘ

☐ Treat as manufacturer coupon

Favorite for all users

3. Create Offer Conditions. Use the usual process to determine the offer conditions.
4. Create Offer Reward. Issue a reward to the SV program created in step 1.
5. Deploy Offer.

6. Customer transactions proceed normally. Data is sent from CPE to the AMS central server by transUpload (default every 5 minutes).
7. Run extract program. The retailer must write an extract program to create an extract file. After customer transactions that have awarded stored value in the new SV program, the transactions are recorded in the Issuance database. The retailer uses the Issuance Web Services (see Issuance documentation) to perform the extract. This extract is run on a schedule determined by the retailer (typical is every 15 minutes, but could be only once per day.)
8. Send extract file to Excentus RM. Contact Excentus for instructions on using FTP or SFTP to send the file to RM.
9. RM processes the file. Every five minutes, RM checks for a new extract file. When a file is found, it is processed and customer TRBs are updated.
10. Customer can now use the updated reward. The latency in this example is up to 25 minutes.
11. RM is updated after the customer uses the reward for fuel, but the retailer has no visibility to this.

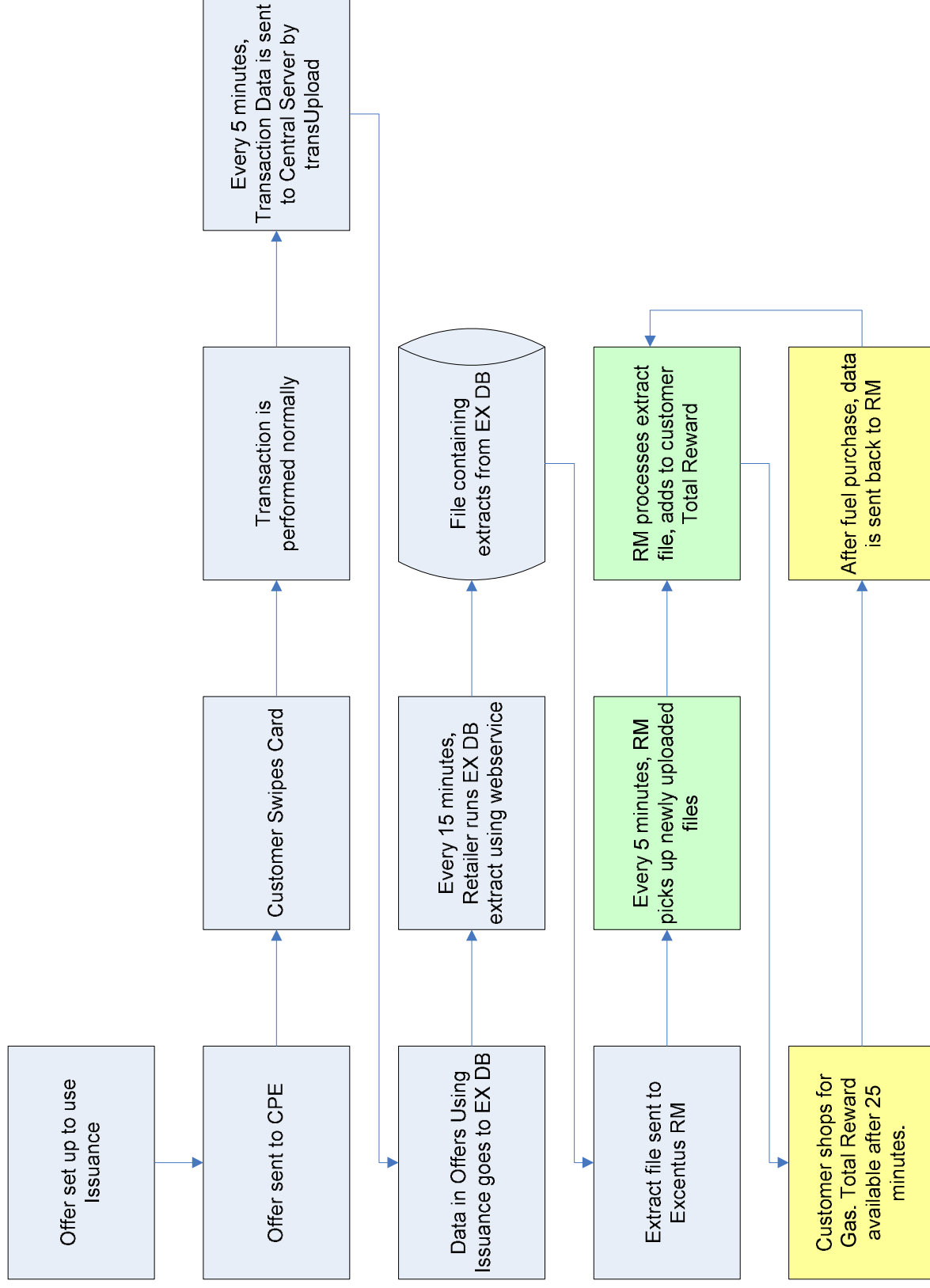


Figure 2. NCR AMS - Excentus Batch Process Flow

4. Excentus Online Integration

In the online integration, each store has a direct connection to Excentus RM. For each customer transaction, the CPE sends a request to RM to get the customer's current TRB and ERB. During the transactions, points (not Stored Value) are awarded based on AMS offers the customer is eligible for. The points are subsequently added to the TRB and sent back to RM as an updated TRB. The updated TRB and the ERB are immediately available to be printed on the customer receipt and for redemption at participating Fuelperks sites.

In addition, the Customer Inquiry screen also connects to RM so Customer Service agents can view and update the TRB as needed. The Customer Web Service also supports the connection to RM.

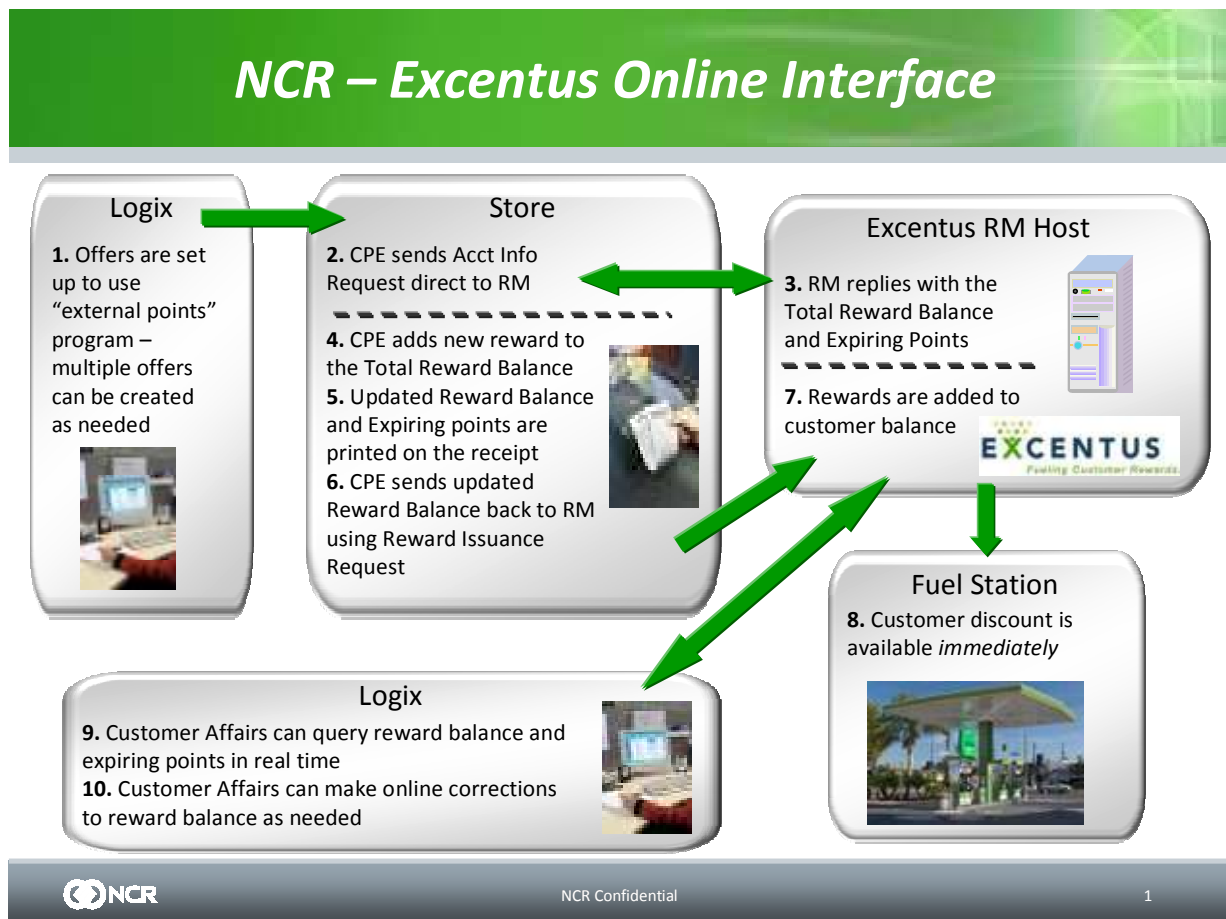


Figure 3. Excentus Online Interface - Overview

4.1.1. Excentus Online Integration – Transaction Flow

1. Customer swipes card.
2. AMS determines the card holder is targeted by one or more AMS offers for Fuelperks Points earning.
3. AMS sends an Account Information Request to RM that includes the Loyalty card number.
4. RM responds with an Account Information Response that includes the TRB and ERB balance. These fields are located in the message as:
 - TotalRewardAmount. Total amount of all available rewards.
 - RewardExpirationAmount. Portion of the TotalRewardAmount that will expire at end of current month.
5. NCR completes the transaction.
6. The transaction is evaluated to determine if a new reward should be issued based on any Fuelperks Points offers conditions.
7. The new reward is added to the TRB (received previously in the Account Information Response) for an updated Total Reward Balance.
8. TRB and ERB are printed on receipt using the ptsaspen tag for the TRB and XXXX for ERB.
9. NCR sends Reward Issuance Request to RM with the updated TRB.
10. RM returns a Reward Issuance Response to NCR acknowledging the request.
11. RM updates the Customer's Reward Balance with the new TRB.
12. The discounts are available immediately for the customer's next fuel purchase.

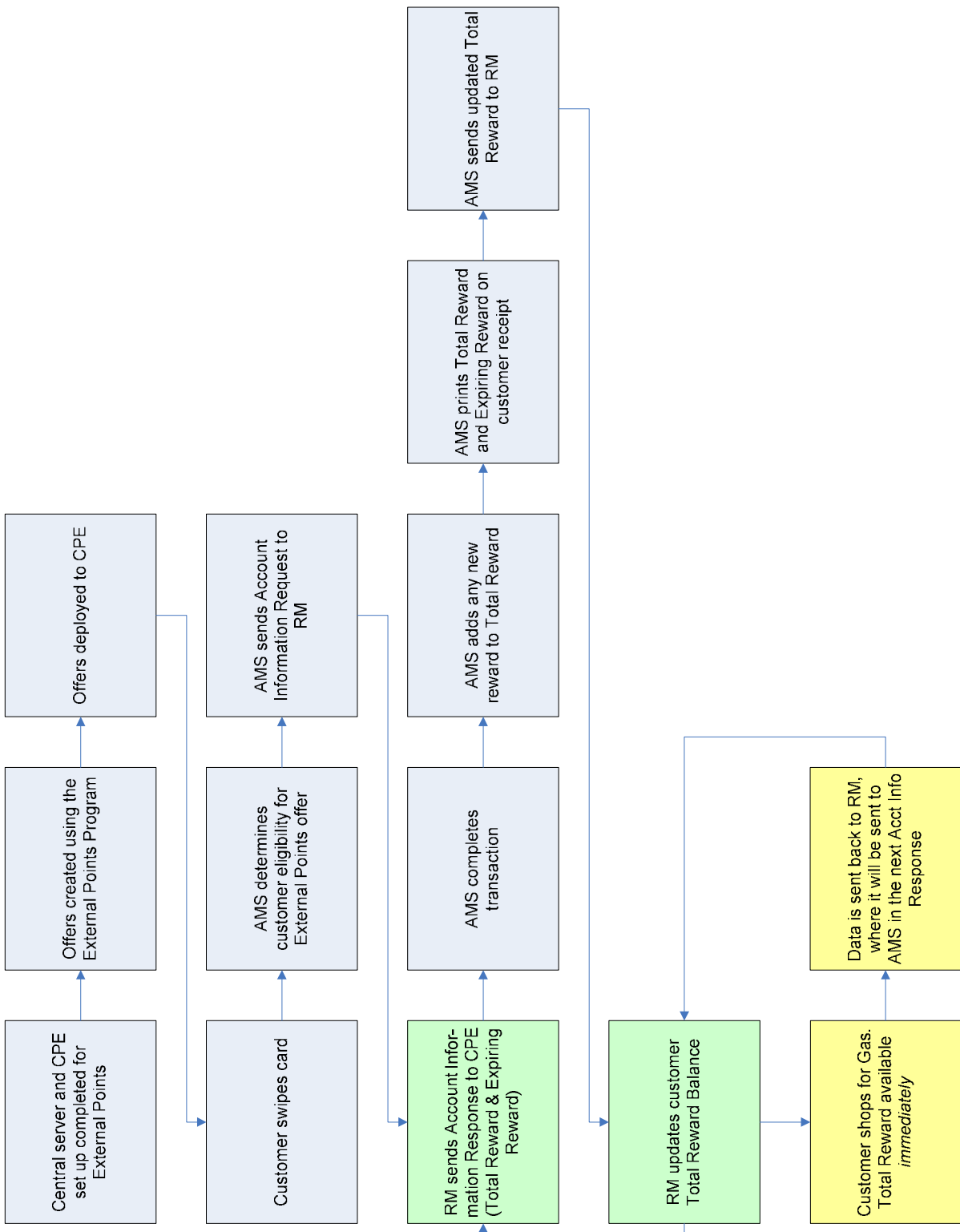


Figure 4. NCR AMS - Excentus Online Process Flow

4.1.2. Excentus Online Integration – Local Server Setup Instructions

1. Update the Excentus web service credential in /usr/local/copient/copient.conf. The URL, site ID, password, and retailer ID are all provided by Excentus. The URL must contain the name of the wsdl as illustrated in the example below. Note that the credentials, *including the URL*, will be different on test and production systems.

```
// Excentus web service credential
// used by external rewards, fuel perks.
$CONF_Excentus_URL="https://www.xperks.net/ENWeb/services/ENWebServiceSOAP/wsdl/ENWebService.wsdl";
$CONF_Excentus_SiteID="1234";
$CONF_Excentus_Password = "password";
$CONF_Excentus_RetailerID="9999";
```

2. Once /usr/local/copient/conf/copient.conf is changed, tcipip_integration needs to be restarted.

[/etc/init.d/tcipip_integration restart](#)

3. This will break the socket connection with the POS system, so wait until POS reconnects to CPE.

[tail -f /usr/local/copient/logs/ipLog](#)

4. After connection is observed in ipLog, the local server setup is complete.

4.1.3. Excentus Online Integration – Central Server Setup Instructions

1. Set External Points Integration. This setting controls the external points integration. In this case, it should be set to 2 for CRM/Excentus. This is system option 80.
[Admin → Configuration Settings](#)

Programs

Allow negative stored value adjustments: Yes ▾

External Points Programs enabled: CRM connector integration ▾

POS Points Program Manual Adjustments: Enabled ▾

POS Stored Value Manual Adjustments: Enabled ▾

Stored value redemption priority: Redeem value that will expire sooner first ▾

- Set up the External Points Program. The same Excentus URL and credentials used in copient.conf must be used here. The URL does NOT use the wsdl, however.
[Admin](#) → [Connectors](#) → [ExcentusExternalRewards](#)

Logix Offers Customers Products Programs Graphics Locations Admin		
Agents Connectors Configuration Offer health Store Health Reports Users		
Connectors		
ID	Connector ▾	GUIDs
1	AltID	0
47	CRM Offer Connector	0
43	CustomerData	1
2	CustomerInquiry	1
45	CustomerUpdate	0
3	CustWeb	1
46	Excentus ExternalRewards	
22	ExternalOfferConnector	
41	Issuance	1
42	KioskWeb	0
35	PhoneHome	

Logix Offers Customers Products Programs Graphics Locations Admin							
Agents Connectors Configuration Offer health Store Health Reports Users							

Connector #46: Excentus ExternalRewards

Details

Name: Excentus ExternalRewards
 Description: Manages the communication of points balance data between AMS and Excentus.

Options

Password:
 Retailer ID:
 Site ID:
 URL:

4.1.4. Excentus Online Integration – Offer Setup Instructions

1. Create a new points program for the external points. Check the box for “This is an external program.” Enter the data that will be passed to the Excentus web service as the program ID in the box labeled “External ID.” [Programs → New](#)

Logix	Offers	Customers	Products	Programs	Graphics	Locations	Admin
Points	Stored value						Edit
New points program							Save

Identification Name: <input type="text"/> Description: <input type="text"/> <input type="checkbox"/> This is an external program External ID: <input type="text"/>
--

Points	Stored value	Edit	History
Points program #49: fuelperks external points test			
Identification Name: fuelperks external points test Description: test of new program to send earned fuelperks discounts to Excentus real time ExcentusExternalID: <input type="text"/> <input checked="" type="checkbox"/> Automatically delete program after one month of disuse Created Tuesday, 28 October 2010, 15:35:49 Edited Tuesday, 26 October 2010, 15:37:00 Contains 430 points held by 3 cardholders		Associated offers Fuel Perks	
Scorecard Scorecard: None			

2. Create an offer for Fuelperks *Offers → New*

[Login](#)
[Offers](#)
[Customers](#)
[Products](#)
[Programs](#)
[Graphics](#)
[Locations](#)
[Admin](#)

[Offers](#)
[Templates](#)
[Summary](#)
[General](#)
[Conditions](#)
[Rewards](#)
[Notifications](#)
[Locations](#)
[History](#)

Offer #373: Fuel Perks

External ID:
 ROID: 376
 Engine: CPE
 Status: Development

Name:

Description:

(Description is limited to 1000 characters)

Category:

Vendor coupon code:

Eligibility:
 Frequency:

Reward:
 Frequency:

Tiers
 Number of tiers (1 to 4):

Employees
☐ Employee filtering
☒ Available to employees only
☐ Available to employees

Priority
 Select Offer Priority:

Dates
 Production:
 (M)

Eligibility:
 (M)

Advanced options
☒ Auto-transferable
☐ Display on web kiosk
☐ Defer evaluation **EDGE**
☐ Enable impression reporting
☒ Enable redemption reporting
☐ Export to archive
☒ Enable issuance ⓘ
☐ Treat as manufacturer coupon

ⓘ

3. Set Product conditions appropriately with Enable Accumulation checked

Logix > Offer 373 > Product condition - Windows Internet Expl...

Offer #373 product condition Save

Product group

☒ Starting with ☐ Containing

\$0.01 Gas ER Adjustment
\$0.05 Gas ER Adjustment
\$0.10 Gas ER Adjustment
% test(14)
03-27-10 Pepsi Must Buy
1.1.10 product group
1.1.12 product group
1.1.2 product group
1.1.5 Product Group
1.1.6 Product Group
1.1.7 product group
1.1.8 product group

Selected products:
▼ Select Deselect ▲
Any product

Excluded products:
▼ Select Deselect ▲

Value

Quantity **Unit**
100.00 Dollars
☐ Unique product

☐ Round customer's purchase to the nearest \$/lb/gal

☒ Enable accumulation

Minimum	Limit	Period
0.01	0.00	per 0 days

4. Add a reward to award points in the external points program set up in step 1, above (in this example, Points Program #49 – fuelperks external points test).

Offer #373 points reward Save

Points program

☒ Starting with ☐ Containing

Multi vendor gas program - 10/17
Triple Coupon Counter
Triple Coupon Counter #2

▼ Select Deselect ▲

Distribution

Quantity awarded:

Maximum adjustment: ☐ None ☒ 100

Chargeback department

Scorecard

Include on scorecard:

5. Add any other conditons, rewards, and the correct locations to the offer and deploy the offer normally.

4.1.5. Excentus Online Integration – Customer Inquiry

1. Look up an offer with the Excentus External Points program associated to it. In Logix, select [Programs](#) → [Points](#)
2. Lookup a customer in Customer Inquiry on the Offers tab that has the offer found in step 1.

Fav	Rem	View	Adjustments	ID	Offer	Status	Customer group
				277	\$10 Huggies – %10 Huggies	Active	Any Cardholder
				257	\$20 Basket Deal %10	Active	Any Cardholder
				1336	%OFF	Expired	Any Cardholder
				125	Amt Off Huggies – Chargeback RT2332	Active	Any Cardholder
				1679	any product with disqualifier	Active	Any Cardholder
				1654	any product with qty/type	Active	Any Cardholder
				134	Basket Deal – %25 Off RT2332	Active	Any Cardholder
				136	Basket Deal – Half Off – Exclude 0301 RT2332	Active	Any Cardholder
				137	Basket Deal – Half Off – Exclude 0700 RT2332	Active	Any Cardholder

3. Click on the [P] button on the row of the offer found in Step 2.
4. When the Points adjustment popup window is loaded, the following sample message may appear if there is an expiration amount > 0:

Note: \$21.01 will expire in 2 days (11/19/2010).

5. Click on the Adjustments tab and find the points program from step one in the list.

Customer card #0000000000000000728

Points

Adjust customer points in program

☒ Starting with ☐ Containing

- \$10 Points Offer (0 points)
- \$25 LS Offer Spend 2010 (0 points)
- (Un)Household Points (0 points)
- A transferable points program (0 points)
- BO Points (0 points)
- CRM Ext Test A (External)
- Diet Pepsi Points (0 points)
- ExcentusProg (External)
- For some reason this points program has a big
- Household Points (0 points)

Adjust

Stored value

Adjust customer stored value in program :

☒ Starting with ☐ Containing

- 3720 (0 units)
- Cents-off 1 (0 units)
- Cents-off 2 (0 units)
- Fuel (0 units)
- Household SV (0 units)
- Issuance SV Cents Off Type (0 units)
- Issued Stored Value (0 units)
- Points (0 units)
- SVProgram1 (0 units)
- Unhousehold SV (0 units)

Adjust

6. Select the program in the list box and click the Adjust button.
7. When the Program adjustment popup window is loaded, a similar message to step 5 should be displayed.

4.1.6. Updates via Web Service

The CustWeb service was updated to request/ update external points from Excentus via the Central Server, and return any reward adjustments (changes to point balances) made by the user. The web service replicates the functionality from the Logix Customer Inquiry screen and sends any reward adjustments back to Excentus with associated logging of changes. See the CustWeb documentation for further information.

4.1.7. Other troubleshooting suggestions

1. If the retailer is unable to connect to Excentus, check:
 - a. Retailer's firewall allows connection from the store to the correct Excentus URL.
 - b. Retailer's firewall allows connection between central server and correct Excentus URL.
 - c. Test and lab systems connect to the Excentus test URL. Production systems connect to the production Excentus URL.
 - d. Settings in copient.conf on each store CPE must contain the correct URL, password, site ID, etc. as provided by Excentus.