

# **Aloha Digital Ordering/Engage Mobile and Consumer Marketing Integration Guide**

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05/17/2023	Added the Loyalty Processor company setting.
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## Purpose of this guide

The purpose of this guide is to explain the features that work in Aloha<sup>®</sup> Digital Ordering/Engage Mobile with Consumer Marketing and how to configure a company in Digital Ordering/Engage Mobile to utilize this integration.

Consumer Marketing is a loyalty provider partnered with Clutch<sup>®</sup>. You integrate Consumer Marketing with Digital Ordering through the Business Services Layer (BSL) application services and must be functioning for the integration to work properly.

## Digital Ordering/Engage Mobile features with Consumer Marketing

Integration with Consumer Marketing allows a consumer to sign up to the Consumer Marketing loyalty program from the Digital Ordering and Engage Mobile websites. The consumer selects the Account icon at the top left of the ordering page during the ordering process or selects Signup during the checkout process. If the consumer already has a loyalty account, the system prompts if the consumer has an account and allows them to link the account based on their email, phone number, or a manual entry of a loyalty number. If the consumer does not have an existing account, the system creates an account with a loyalty number.

During the ordering process, the consumer earns and accrues loyalty rewards, points, and discounts in the Digital Ordering website, based on their online orders. The consumer can use the loyalty reward offers, reward dollars, auto-applied promotions, and Consumer Marketing coupons.

## Configuring Aloha Digital Ordering/Engage Mobile with Consumer Marketing

You must configure the following steps **prior** to switching the company over to the Digital Ordering portal and Engage Mobile.

**Note:** The terms 'BSL organization name' and 'NEP organization' are used interchangeably between the BSL and Aloha Online Ordering products.

### You must have the following information available:

- You must have a **BSL organization** created for the company to utilize the services. This is created for every Digital Ordering/Engage Mobile customer. You need the name of the organization to enter in to Web Admin. You obtain the BSL organization name from the 'Organization' field on the Digital Ordering portal and Engage Mobile login screens.
- You must have an **Enterprise unit ID** created for each site or location within the BSL organization. These are created during the site provisioning process; however, you should verify with your implementation specialist if this process is completed. You need the IDs to enter into Web Admin.

### Creating a POS comp for use with Consumer Marketing

You must create a comp in the Aloha POS for Digital Ordering/Engage Mobile to apply discounts to orders during the submit order process. The comp is used in the POS for discount and also displays on the receipt. You can create one comp in the Aloha POS to be used for each discount type or create multiple comps for each type of discount. The decision is based on how you want your reporting in the POS to function as well as how the discount displays on the receipt. In either scenario, you need to create the comp as described below, with the names of the comps being at your preference.

**Note:** Make note of the comp IDs you create here as you will map these in the Comp Mapping function in ["Linking a POS comp with an Online Ordering comp"](#) on page 6.

**To create a POS comp:**

1. In the Aloha POS, select **Maintenance > Payments > Comps**.
2. Click the **New** drop-down arrow, select **Regular** as the type, and click **OK**.

Settings	
Number	19
Name	AO Loyalty Comp
Type	Regular
Active	<input checked="" type="checkbox"/>
Check name	
Method	Prompt for amount
Maximum amount	999.00
Allow before items ordered	<input checked="" type="checkbox"/>
Report as	Default
Print check on close	<input type="checkbox"/>
Open drawer on close	<input type="checkbox"/>
Manager required	<input type="checkbox"/>
Include comp amount in gratuity calculation	<input type="checkbox"/>
Must select items	<input type="checkbox"/>
Prompt for unit (store number)	<input type="checkbox"/>
Prompt for name	<input type="checkbox"/>
Text entry required	<input type="checkbox"/>
Bar code range	
Lowest	
Highest	

Figure 1 Comps Function

3. Type a **name** for the comp to indicate the discount that comes from online ordering for loyalty.
4. Click **Active** to make the comp active.
5. Select **Prompt for Amount** from the 'Method' drop-down list. This allows Aloha Online Ordering to inject the discounted amount.
6. Type **999** in 'Max amount' to specify the maximum amount allowed for the comp. This is typically set high and Aloha Online Ordering calculates the amount for you.
7. Select **Allow before items ordered**.
8. Clear **Manager required**. If you select this option, the comp fails in Aloha Online Ordering.
9. Leave the **remaining options** on the Comp tab as their default.
10. Select the **Taxes** tab.
11. Clear **all options** on the Taxes tab.
12. Select the **Restrictions** tab.
13. Select **all options** on the Restrictions tab.
14. Type **99** in 'Per check.'
15. For Table Service operations, type **99** in 'Per table.'
16. Select the **Eligibility** tab.
17. Select a **category** that contains all items used in your online menu, or select the 'All Items' category, from the 'Eligible items' drop-down list.

18. Click **Save**.
19. Repeat this **procedure** if you are creating a separate comp for each type of Consumer Marketing discount.
20. Click **Close** to exit the **Comps** function.

## Associating the BSL organization name

You must associate the BSL organization name to the company in Company Setup, and the BSL Enterprise unit to each site used in Digital Ordering/Engage Mobile. This links the BSL organization to the online ordering company, and each BSL Enterprise site to the online ordering site.

You must have a sufficient role to access the Company Setup function. This is usually performed by an NCR employee before the company migrates to Digital Ordering/Engage Mobile. If you do not see the Company Setup function, contact your implementation specialist or the Online Ordering support team to complete this process.

### To add the BSL organization name in Company Setup:

1. In Web Admin, log into the **company**.
2. Select **Configuration > Company Setup**.
3. Click **Edit Company**. A dialog box appears.

Edit Company	
First Data Merchant Id	
First Data Terminal Id	
First Data DataWire Id	
First Data Service Id	
First Data Application Id	
Block Website Redirect URL	
StoredValueApiSettings	
MasterPass Consumer Key	
MasterPass Checkout ID	
<b>NEP Organization Id</b>	
Urban Airship URL	
Urban Airship Secret	
Urban Airship App Key	
Apple Private Key	
Mobile App Deep Link	
Apple App Id	
iOS Bundle Identifier	
Android Package Name	
Delivery Menu Enabled	False
CFC Base URL	
CFC Web Connection Id	
CFC API Version	

Save Close

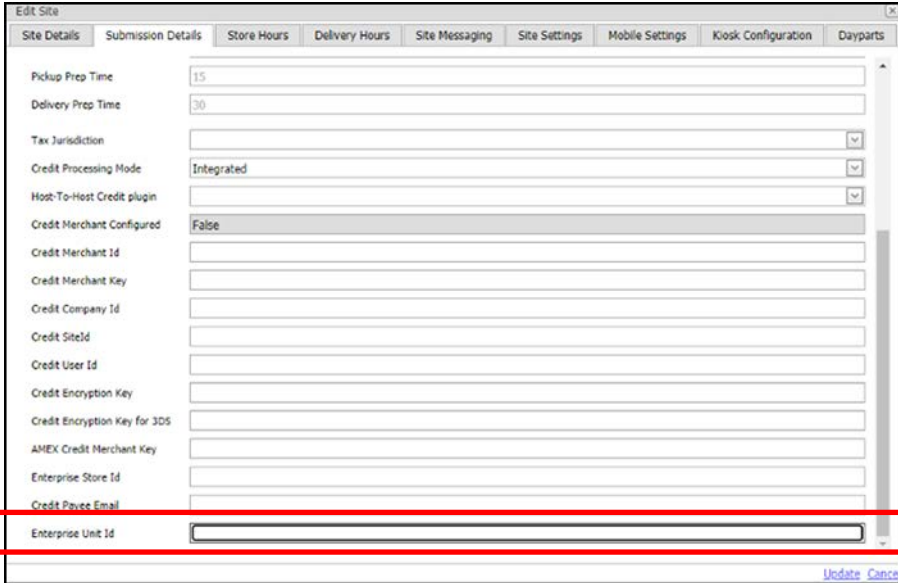
Figure 2 Company Setup - Edit Company (NEP Organization Id)



4. Type the **BSL organization name** in 'NEP Organization Id.'
5. Click **Save** at the bottom of the screen.
6. Click **Close** at the bottom of the screen.
7. Continue to the **next procedure**.

#### To add the Enterprise Unit ID in Sites:

1. While still in Web Admin, select **Configuration > Sites Setup > Site**.
2. Select the **site** from the list and click **Edit Site**.
3. Select the **Order Submission** tab.



The screenshot shows the 'Edit Site' form with the 'Order Submission' tab selected. The form contains various fields for site configuration. The 'Enterprise Unit Id' field at the bottom is highlighted with a red circle. The fields include: Pickup Prep Time (15), Delivery Prep Time (30), Tax Jurisdiction (dropdown), Credit Processing Mode (Integrated), Host-To-Host Credit plugin (dropdown), Credit Merchant Configured (False), Credit Merchant Id, Credit Merchant Key, Credit Company Id, Credit SiteId, Credit User Id, Credit Encryption Key, Credit Encryption Key for 3DS, AMEX Credit Merchant Key, Enterprise Store Id, Credit Payee Email, and Enterprise Unit Id. The 'Update' and 'Cancel' buttons are visible at the bottom right.

Figure 3 Site - Order Submission Tab

4. Type the **Enterprise Unit ID** for the site in 'Enterprise Unit ID.'
5. Click **Update**.
6. Repeat this **procedure** to add the corresponding Enterprise unit ID for each site.
7. Exit the **Site** function.

## Enabling Consumer Marketing

You must select Clutch as the Loyalty processor in Company Setup. You must have a sufficient role to access the Company Setup function. If you do not see the Company Setup function, contact your implementation specialist or the Online Ordering support team to complete this process.

**To enable Consumer Marketing:**

1. While still in Web Admin, log into the **company**.
2. Select **Configuration > Company Setup**.
3. Click **Edit Company**.

The screenshot shows the 'Edit Company' form with the following fields:

Company Code	ALCA001
Name	Aloha Café
Default Payments Enterprise Id	DEMOMODE
Billable Order Count Threshold	5
Stored Value Credit Company ID	
LoyaltyProcessor	Clutch
Customer Voice Enabled	False
Customer Voice Branding Key	
Customer Voice Import Id	
Customer Voice API Key	
Customer Voice API Password	
Delivery Zones Enabled	False
Enable IOS	False
Enable Android	False
Mobile Website Enabled	True
Enable Customer Data Export	False
Enable Configuration Center Integration	False
Configuration Center Integration Login Name	
Configuration Center Integration Login Activation Code	
Company Is Chick-Fil-A	False
Paytronix Integration Enabled	False
Paytronix AgentName	
Paytronix Webservice UserName	

Figure 4 Company Setup - Edit Company (Loyalty Processor)

4. Select **Clutch** from the 'Loyalty Processor' drop-down list.
5. Click **Save** at the bottom of the screen.
6. Click **Close** at the bottom of the screen.

## Linking a POS comp with an Online Ordering comp

You must create and link an online ordering comp to the POS comp to allow Online Ordering to know which comp ID on the POS is used to discount a Consumer Marketing reward. You enter the ID of the comp you created in ["Creating a POS comp for use with Consumer Marketing" on page 2](#) in the 'POS Id' field. This section assumes you are linking multiple POS comps with multiple online ordering comps.

**To link a POS comp with an online ordering Reward Offer comp:**

1. While still in Web Admin, select **Designs > Discounts > Comps**.
2. Click **Add Comp** to create a new comp to use specifically with a reward offer discount. The comp is applied when a Consumer Marketing reward offer is discounted from the check. This includes offers, coupons, and auto-apply rewards.

The screenshot shows the 'Edit Comp' window with the 'Configuration Details' tab selected. The fields are as follows:

Id	2	Loyalty Id	
Name	Reward Offer		
Description	Consumer Marketing Reward on Offers		
POS Id	14	Loyalty Id	
Online Comp Code	Consumer Marketing Reward on Offers		
Start Date	3/18/2021	End Date	3/30/2029
Account Required	<input checked="" type="checkbox"/>	Enabled	<input type="checkbox"/>
Reduction Type	PesOffer	Reduction Percent / Amt	1.0000
Max Reduction Amt	100.0000	Transaction Minimum Amt	1.0000
Comp Usage Threshold	None	Max Usage Count / Amt	
Recurring Usage Count / Amt		Sales Item Group	All Items
Auto-Apply	<input type="checkbox"/>	Free Modifier Count	

Buttons: Update, Cancel

Figure 5 Comps - Configuration Details Tab (Reward Offer)

**Note:** The comp ID (2 in this example) is used in the next section to enter in 'RewardOfferCompId' in Company Settings. See ["Configuring company settings" on page 8](#).

3. Complete the **Configuration Details** tab, using the provided example as a guide.
4. Click **Update** at the bottom of the screen to save and exit the screen.

**To link a POS comp with an online ordering Apply Reward Dollars comp:**

1. While still in the Comps function, click **Add Comp** to create a new comp to use specifically with a Rewards Dollars discount. This comp is applied when a Consumer Marketing Dollar Discounts offer is discounted from the check.

Configuration Details		Configuration Periods	Assigned Sites
Id	3		
Name	Apply Rewards Dollars		
Description	Applys rewards based on Consumer Marketing Dollars		
POS Id	14	Loyalty Id	
Online Comp Code	Applys rewards based on Consumer Marketing Dollars		
Start Date	3/18/2021	End Date	3/30/2029
Account Required	<input checked="" type="checkbox"/>	Enabled	<input checked="" type="checkbox"/>
Reduction Type	PesRewardDollars	Reduction Percent / Amt	1.0000
Max Reduction Amt	100.0000	Transaction Minimum Amt	1.0000
Comp Usage Threshold	None	Max Usage Count / Amt	
Recurring Usage Count / Amt		Sales Item Group	All Items
Auto-Apply	<input type="checkbox"/>	Free Modifier Count	

Figure 6 Comps - Configuration Details Tab (Apply Reward Dollars)

**Note:** The comp ID (3 in this example) is used in the next section to enter in 'RewardDollarsCompId' in Company Settings. See ["Configuring company settings" on page 8](#).

2. Complete the **Configuration Details** tab, using the provided example as a guide.
3. Click **Update** at the bottom of the screen to save and exit the screen.

## Configuring company settings

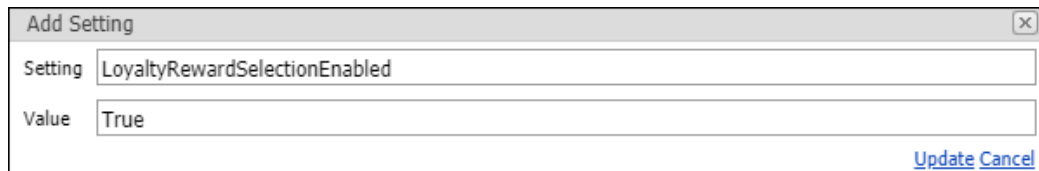
You must add the following company settings in Web Admin for Consumer Marketing integration.

- LoyaltyRewardSelectionEnabled
- RewardOfferCompId
- RewardDollarsCompId
- ApplyDiscountAllowsLoyaltyCoupons
- AllowLoyaltyDiscountStacking
- LoyaltyProcessor
- UniqueVoicePhoneVerification (optional)

**To add the LoyaltyRewardSelectionEnabled company setting:**

The 'LoyaltyRewardSelectionEnabled' company setting allows the consumer to select a loyalty reward.

1. While still in Web Admin, select **Configuration > Company Settings Setup**.
2. Select a **set** from the 'Choose Settings Set' drop-down list.
3. Begin typing **LoyaltyRewardSelectionEnabled** in the search box to filter the list of company settings and see if the setting already exists. If the setting exists, ensure steps 4 and 5 are in place. If the setting does not exist, click **Add Setting** and continue with the procedure.



The screenshot shows a dialog box titled "Add Setting". It has two input fields: "Setting" with the text "LoyaltyRewardSelectionEnabled" and "Value" with the text "True". At the bottom right, there are two buttons: "Update" and "Cancel".

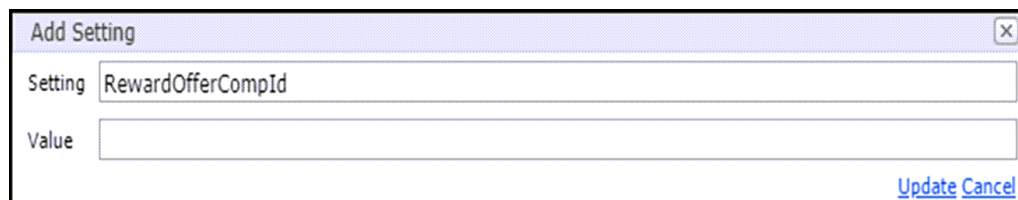
Figure 7 LoyaltyRewardSelectionEnabled Company Setting

4. Type **LoyaltyRewardSelectionEnabled** in 'Setting.'
5. Type **True** in 'Value.'
6. Click **Update**.

**To add the RewardOfferCompId company setting:**

The RewardOfferCompId company setting aligns the comp ID created in the Web Admin Comps function, as described in ["Linking a POS comp with an Online Ordering comp" on page 6](#).

1. While still in Web Admin, select **Configuration > Company Settings Setup**.
2. Select a **set** from the 'Choose Settings Set' drop-down list.
3. Begin typing **RewardOfferCompId** in the search box to filter the list of company settings and see if the setting already exists. If the setting exists, ensure steps 4 and 5 are in place. If the setting does not exist, click **Add Setting** and continue with the procedure.



The screenshot shows a dialog box titled "Add Setting". It has two input fields: "Setting" with the text "RewardOfferCompId" and an empty "Value" field. At the bottom right, there are two buttons: "Update" and "Cancel".

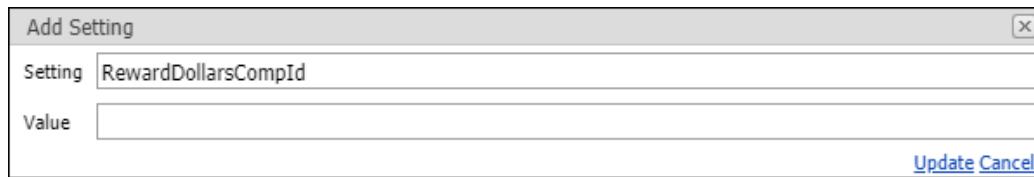
Figure 8 RewardOfferCompId Company Setting

4. Type **RewardOfferCompId** in 'Setting.'
5. Type the **comp ID** of the comp mapping you created in Web Admin.
6. Click **Update**.

**To add the RewardDollarsCompId company setting:**

The RewardDollarsCompId company setting aligns the comp ID created in the Web Admin Comps function, as described in [“Linking a POS comp with an Online Ordering comp” on page 6.](#)

1. While still in Web Admin, select **Configuration > Company Settings Setup.**
2. Select a **set** from the ‘Choose Settings Set’ drop-down list.
3. Begin typing **RewardDollarsCompId** in the search box to filter the list of company settings and see if the setting already exists. If the setting exists, ensure steps 4 and 5 are in place. If the setting does not exist, click **Add Setting** and continue with the procedure.



The screenshot shows a dialog box titled "Add Setting" with a close button (X) in the top right corner. It contains two input fields: "Setting" with the text "RewardDollarsCompId" and "Value" which is currently empty. At the bottom right of the dialog, there are two buttons: "Update" and "Cancel".

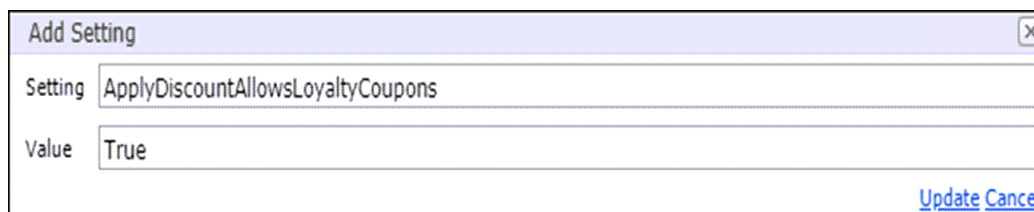
Figure 9 RewardDollarsCompId Company Setting

4. Type **RewardDollarsCompId** in ‘Setting.’
5. Type the **comp ID** of the comp mapping you created in Web Admin.
6. Click **Update.**

**To add the ApplyDiscountAllowsLoyaltyCoupons company setting:**

When True, the ApplyDiscountAllowsLoyaltyCoupons company setting allows consumers to use the coupons configured in Web Admin and Consumer Marketing coupons. When False, consumers can only use coupons configured in Web Admin.

1. While still in Web Admin, select **Configuration > Company Settings Setup.**
2. Select a **set** from the ‘Choose Settings Set’ drop-down list.
3. Begin typing **ApplyDiscountAllowsLoyaltyCoupons** in the search box to filter the list of company settings and see if the setting already exists. If the setting exists, ensure steps 4 and 5 are in place. If the setting does not exist, click **Add Setting** and continue with the procedure.



The screenshot shows a dialog box titled "Add Setting" with a close button (X) in the top right corner. It contains two input fields: "Setting" with the text "ApplyDiscountAllowsLoyaltyCoupons" and "Value" with the text "True". At the bottom right of the dialog, there are two buttons: "Update" and "Cancel".

Figure 10 ApplyDiscountAllowsLoyaltyCoupons Company Setting

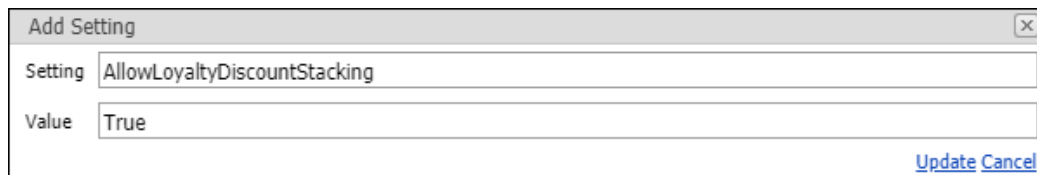
4. Type **ApplyDiscountAllowsLoyaltyCoupons** in ‘Setting.’

5. Type **True** or **False** in 'Value.'
6. Click **Update**.

**To add the AllowLoyaltyDiscountStacking company setting:**

When True, the AllowLoyaltyDiscountStacking company setting combines multiple awards in one order. Only a single offer reward is used per transaction, but you can combine different types, such as an offer, coupon, and the use of reward dollars on the same transaction.

1. While still in Web Admin, select **Configuration > Company Settings Setup**.
2. Select a **set** from the 'Choose Settings Set' drop-down list.
3. Begin typing **AllowLoyaltyDiscountStacking** in the search box to filter the list of company settings and see if the setting already exists. If the setting exists, ensure steps 4 and 5 are in place. If the setting does not exist, click **Add Setting** and continue with the procedure.



The screenshot shows a dialog box titled "Add Setting" with a close button (X) in the top right corner. It contains two input fields: "Setting" with the text "AllowLoyaltyDiscountStacking" and "Value" with the text "True". At the bottom right, there are two buttons: "Update" and "Cancel".

Figure 11 AllowLoyaltyDiscountStacking Company Setting

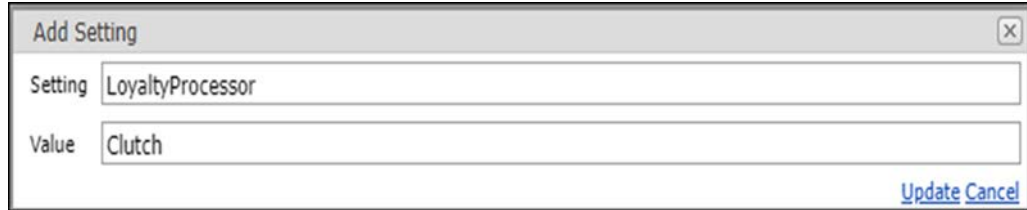
4. Type **AllowLoyaltyDiscountStacking** in 'Setting.'
5. Type **True** or **False** in 'Value.'
6. Click **Update**.

**To add the LoyaltyProcessor company setting:**

The 'LoyaltyProcessor' company setting specifies the processor used for loyalty. For integrating with Consumer Marketing, set this value to Clutch.

1. While still in Web Admin, select **Configuration > Company Settings Setup**.
2. Select a **set** from the 'Choose Settings Set' drop-down list.

3. Begin typing **LoyaltyProcessor** in the search box to filter the list of company settings and see if the setting already exists. If the setting exists, ensure steps 4 and 5 are in place. If the setting does not exist, click **Add Setting** and continue with the procedure.



The image shows a dialog box titled "Add Setting" with a close button (X) in the top right corner. It contains two text input fields: "Setting" with the text "LoyaltyProcessor" and "Value" with the text "Clutch". At the bottom right, there are two buttons: "Update" (underlined) and "Cancel".

Figure 12 LoyaltyProcessor Company Setting

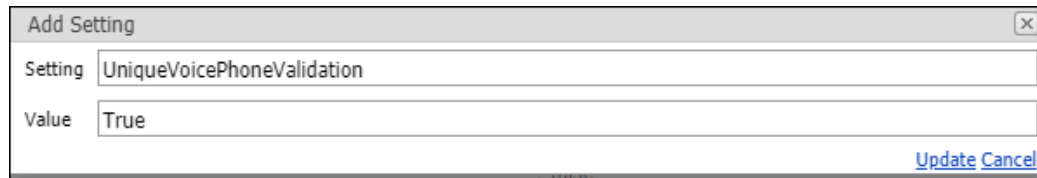
4. Type **LoyaltyProcessor** in 'Setting.'
5. Type **Clutch** in 'Value.'
6. Click **Update**.



**To add the UniqueVoicePhoneValidation company setting:**

When True, the optional UniqueVoicePhoneValidation company setting verifies the phone number when a consumer creates an account, if it is unique to the company. When False, the same phone number used with multiple accounts can use the same loyalty account. The default value is False even if the setting does not exist,

1. While still in Web Admin, select **Configuration > Company Settings Setup**.
2. Select a **set** from the 'Choose Settings Set' drop-down list.
3. Begin typing **UniqueVoicePhoneValidation** in the search box to filter the list of company settings and see if the setting already exists. If the setting exists, ensure steps 4 and 5 are in place. If the setting does not exist, click **Add Setting** and continue with the procedure.



The screenshot shows a dialog box titled "Add Setting" with a close button (X) in the top right corner. It contains two input fields: "Setting" with the text "UniqueVoicePhoneValidation" and "Value" with the text "True". At the bottom right, there are two buttons: "Update" and "Cancel".

Figure 13 UniqueVoicePhoneValidation Company Setting

4. Type **UniqueVoicePhoneValidation** in 'Setting.'
5. Type **True** or **False** in 'Value.'
6. Click **Update**.

## Using Aloha Digital Ordering/Engage Mobile with Consumer Marketing

Signing into Consumer Marketing with Digital Ordering/Engage Mobile is a simple process. While the consumer remains logged into their account, the system accrues loyalty points and rewards for each order.

### Digital Ordering experience

With the Digital Ordering experience, the consumer can sign up with Consumer Marketing and view Loyalty information for the account.

### Signing up for Consumer Marketing in Digital Ordering

1. To sign up in Digital Ordering, the consumer selects the **Account link** at the top left on the order page to start the process. The process also starts when the consumer selects **Proceed to Check Out** during ordering, and then selects **SIGN UP**. The SIGN UP screen appears.

SIGN IN SIGN UP

Have a loyalty account with our old system?  
Don't worry! We'll let you link it in the  
following pages.

Continue with Facebook

Or

First Name \* Last Name \*  
John Doe

Phone Number \*  
3035555555

Email Address \*  
john.doe@ncr.com

Password \*  
••••••••

Security Question \*  
Mom's Maiden Name

Security Answer \*  
Dew

Receive updates, offers, and  
promotions directly to your inbox

Join our Loyalty program

CREATE ACCOUNT

Figure 14 Digital Ordering SIGN UP Screen

2. The consumer completes the **information** and selects **Join our Loyalty program**.

- The consumer selects **CREATE ACCOUNT**. The LINK ACCOUNT screen appears, asking the consumer if they have any existing loyalty accounts.

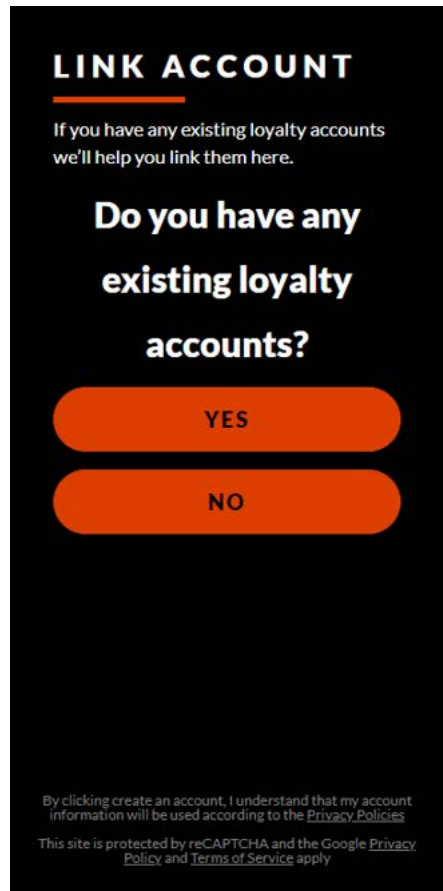


Figure 15 Do You Have Any Existing Loyalty Accounts Screen

- If the consumer selects **NO**, the system creates an account for the consumer with an assigned Loyalty number, which was given to Digital Ordering from the Consumer Marketing system.

5. If the consumer selects **YES**, an additional screen appears with search methods for identifying an existing loyalty account in the Consumer Marketing system.

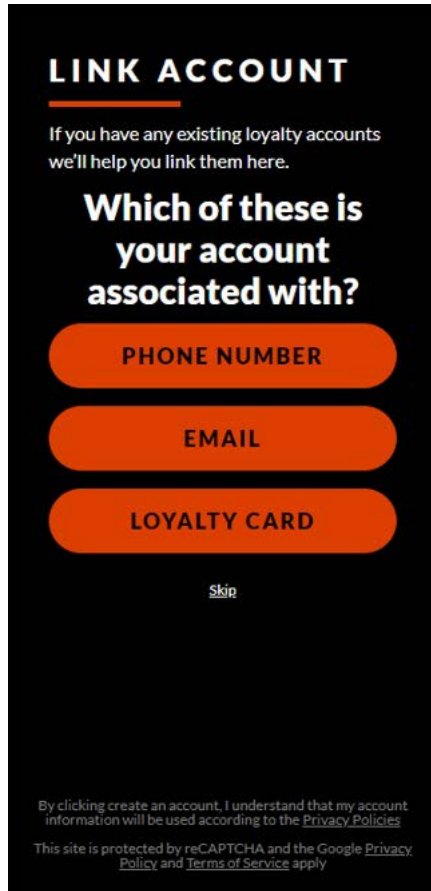


Figure 16 Which of These is Your Account Associated With Screen

6. The consumer selects the **account association method**. Depending on the selection, the consumer confirms either the **phone number**, **email**, or **loyalty number**. Once verified, the system signs the consumer in and links them to their Consumer Marketing loyalty account.

## Viewing Consumer Marketing loyalty information in Digital Ordering

When signed in, the consumer can select the Account icon to view their loyalty information. The icon appears with the consumer name and only when the consumer is signed in.

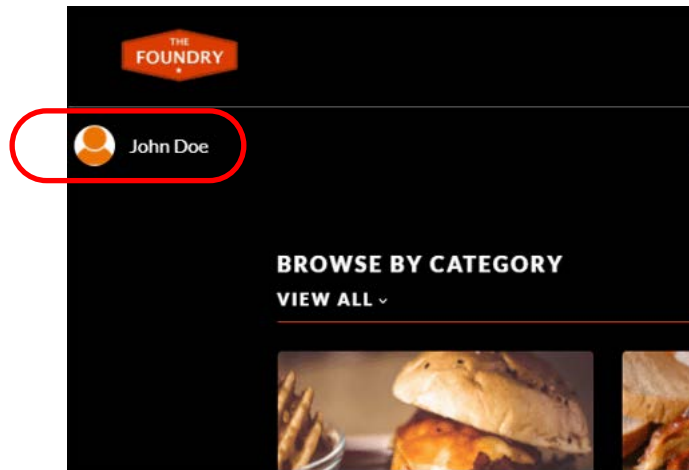


Figure 17 Loyalty Account Icon

The Profile screen appears with the consumer's loyalty number and allows them to edit the information in their profile.

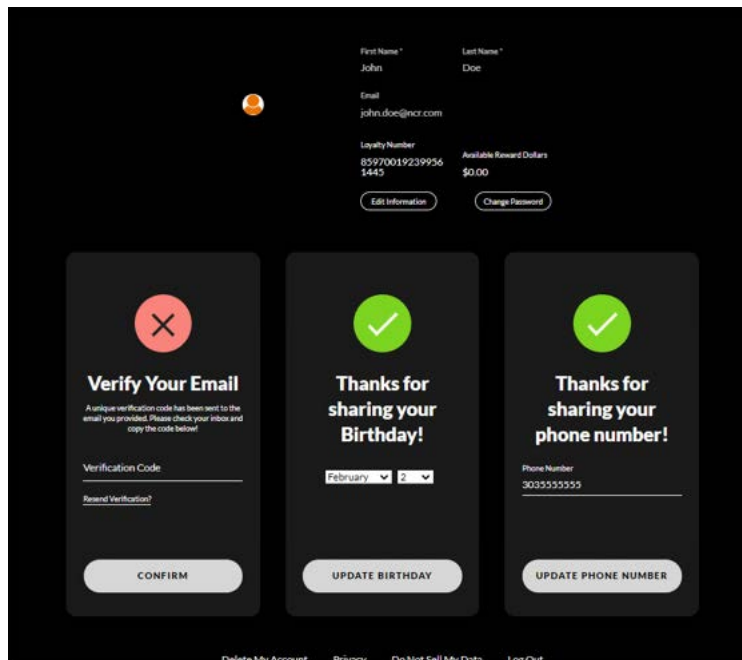


Figure 18 Digital Ordering Profile Screen

## Engage Mobile experience

With the Engage Mobile experience, the consumer can sign up with Consumer Marketing.

1. To sign up with Consumer Marketing in Engage Mobile, the consumer selects **Sign-Up / Log-In** from the navigation pane to start the process. The Create Account screen appears.

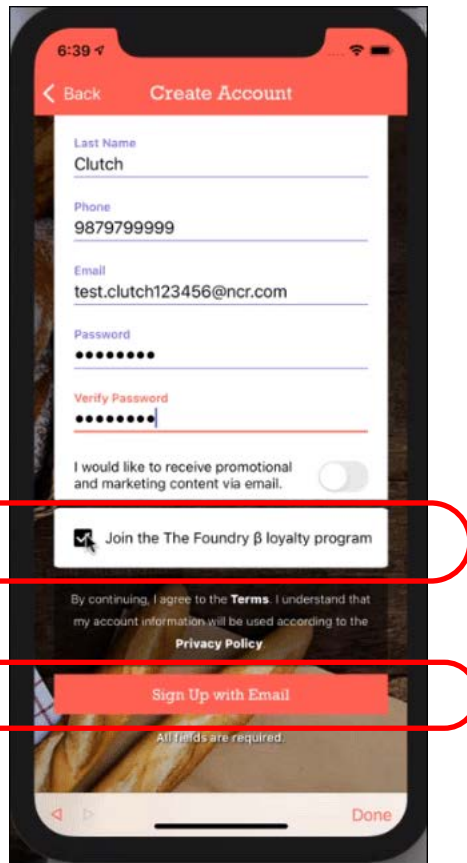


Figure 19 Engage Mobile Create Account Screen

2. The consumer completes the **information** and selects **Join the <loyalty program>**.
3. The consumer selects **Sign Up with Email**. A banner appears on the home screen to indicate the consumer is signed into Consumer Marketing. If the consumer chooses not to opt into Consumer

Marketing at this time, a banner appears on the home screen, asking the consumer to join Consumer Marketing loyalty.

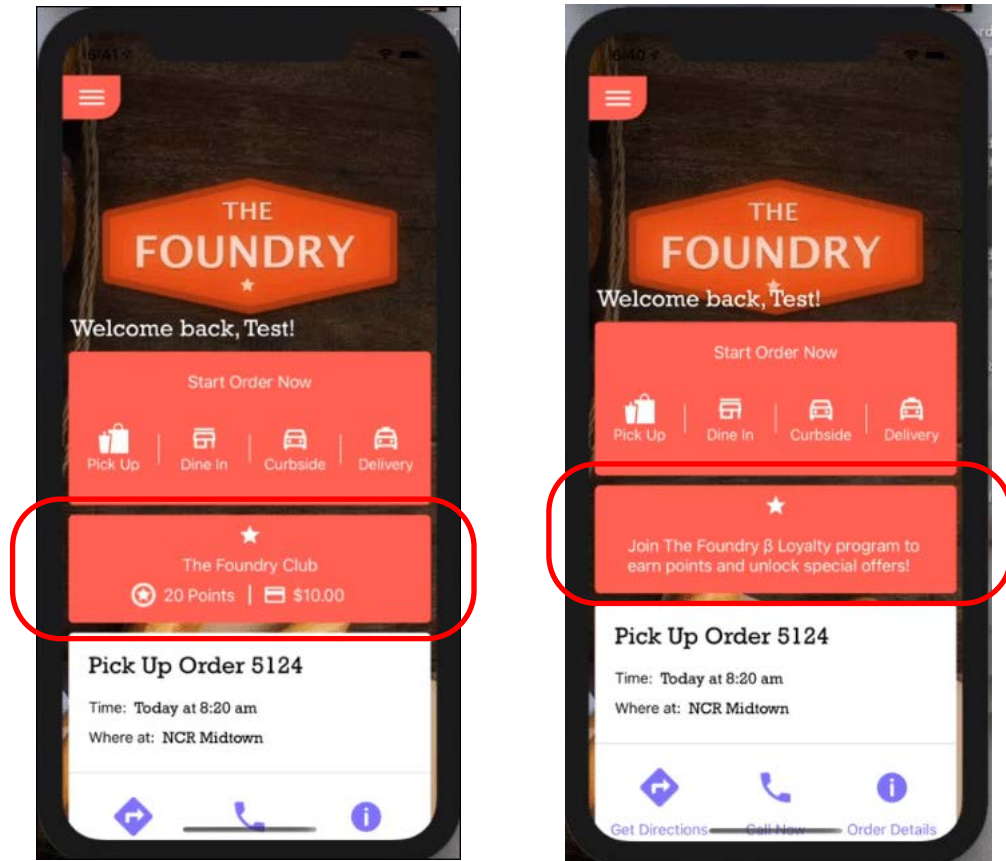


Figure 20 Consumer Marketing Banner (Signed In - Left, Not Signed in - Right)

The consumer can also sign up for Consumer Marketing from the Account screen.

1. To sign up with Consumer Marketing from the Account screen in Engage Mobile, the consumer selects **Account** from the navigation pane. The Account screen appears.

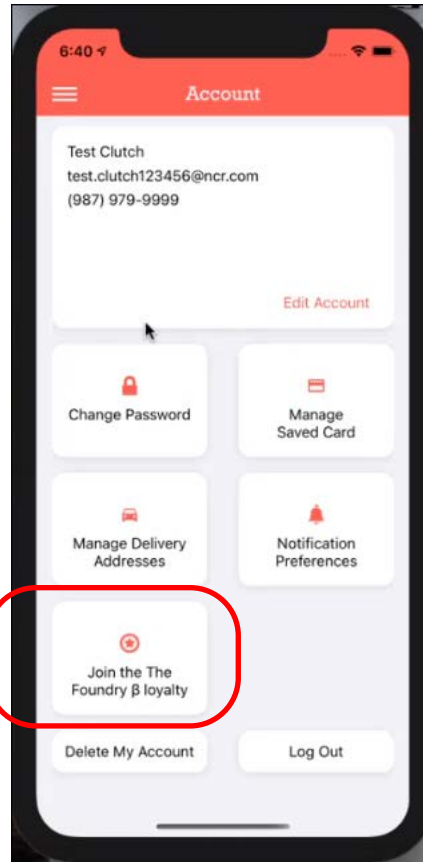


Figure 21 Engage Mobile Account Screen

2. The consumer selects **Join the <Loyalty program>**.



## Aloha Digital Ordering/Engage Mobile and Consumer Marketing, Integration Guide

NCR welcomes your feedback on this document. Your comments can be of great value in helping us improve our information products. Please contact us using the following email address:

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