System Administration & Configuration Guide

MD0015-003
3rd Edition

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General Information

Declarations

WARRANTIES

TRADEMARKS

DESIGN AND PRODUCTION

This manual was written with Adobe FrameMaker.

PRINTING HISTORY

New editions of this manual incorporate new and changed material sine the previous edition(s). Minor corrections and updates may be incorporated into reprints of the current edition without changing the publication date or the edition number.

Edition	Month	Year	Software Version
3rd	July	2008	4.4
2nd	March	2007	2.1
1st	August	2006	2.0

Typographical Considerations

Document Scope

The intended purpose of this document is provide examples on how specific features or functionalities may be used and inform users of new features, enhancements to existing functionality, and any revisions or modifications to existing features and functions. This document is intended to be a comprehensive "how-to" guide for outlining every possible scenario.

Each organization's needs will be unique and the requirements will vary for each.

iCare Introduction & Overview

Overview

iCare is an enterprise-wide Customer Relationship Management (CRM) solution. It provides analysis reporting and loyalty/reward capabilities, including gift, payment, and loyalty accounts. These accounts are typically associated with a stored value card or loyalty card that the customer uses at the point-of-sale (POS). For CRM, there are generally four facets:

1. Account Administration - this feature allows for users of an appropriate privilege level to manage existing accounts, issue or pre-activate new accounts, and review customer changes.
2. Gift Payment and Loyalty (GPL) - this card program offers loyalty/reward capabilities, including gift, payment, and loyalty accounts. These accounts are typically associated with a stored value card or loyalty card that the customer uses at the point of sale.
3. Coupon Administration - issue coupons to account holders
4. Campaigning - create and upload promotional materials which may be distributed via bulk emailing campaigns to registered loyalty account holders

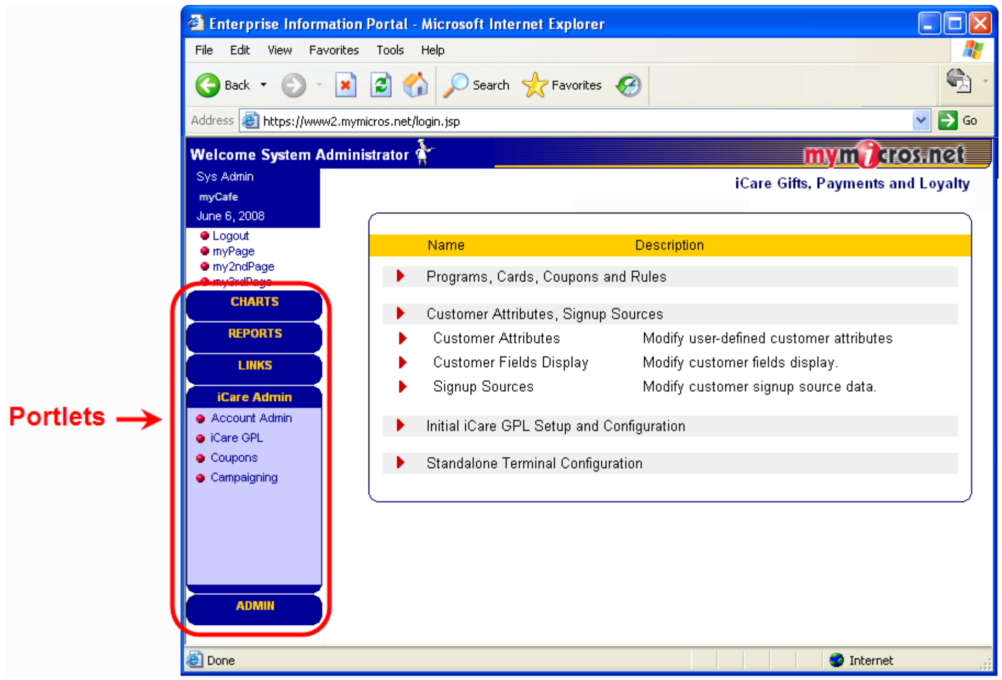
Note — *Campaigning is **not** included in the standard iCare package and is available as an add-on component of the iCare Product.*

Please speak with a MICROS Account Representative for information on purchasing this component for your organization.

This manual is setup to discuss all aspects of the iCare Product Solution, as well as provide tips and instructions on how to setup and configure the applications. These functions are typically managed by the System Administrator.

Basic Site Navigation & Administration

Basic site navigation is critical to maneuvering through the Enterprise Information Portal. The standard layout of the website is Portals and Portlets down the left side of the page and window on the right side with options dependent on the portlet selection:

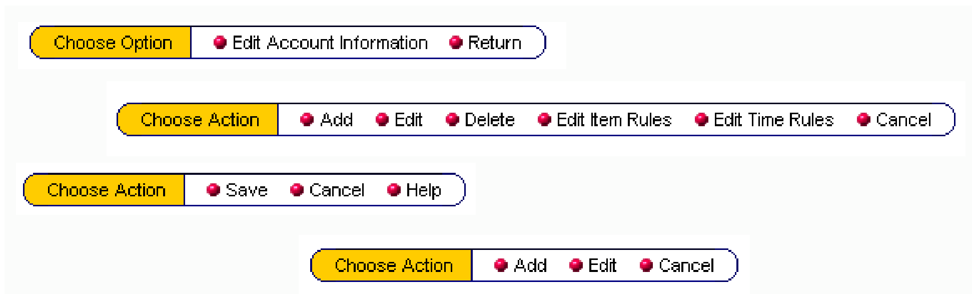


Portlets may be configured via Admin | Portal and Admin | Warehouse.

Note	*For a comprehensive overview of Enterprise Information Portal navigation, please refer to the mymicros System Administrator's Guide.*

Top Menu Bars

At the top of many of the configuration screens, users will see a top menu bar. Standard options in this menu bar typically consist of Cancel, Save, Help, and Return. Depending on the options on the screen, the actions within the top menu bar will vary. Additionally, many of the options within the top menu bar are configured based on the privileges of the user, as well as the settings for the organization. Below are some examples of top menu bars; be sure to note how they are similar, as well as how their options differ:



iCare Customized Portlet Privileges

There are a number of customized features that iCare has developed at an organization's request. Although created with one or two customers in mind, these options may be turned on and implemented for any customer's use. Any system administrator can, essentially, enable theses options.

Standard Portlet Privileges include:

- Add/Edit Account Info
- Reopen Account
- Close Account
- Reverse Transactions
- Post Transactions
- Issue New Accounts
- Bulk Issue New Accounts
- Preactivate Accounts
- Create Account Numbers

Customized Portlet Privileges include:

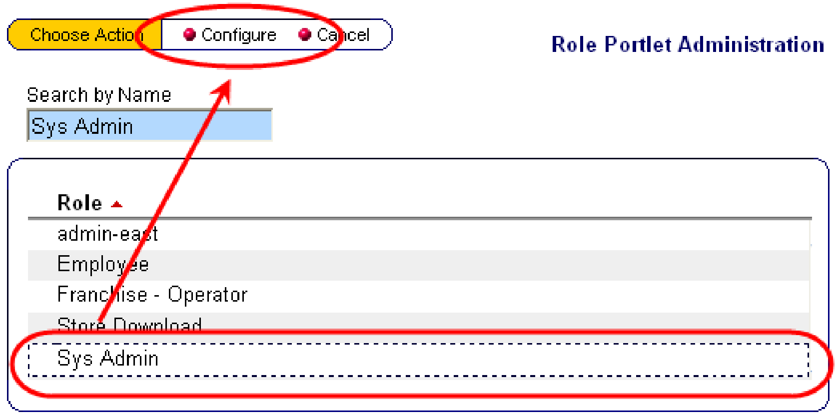
- Transfer Accounts
- Review Customer Changes
- Reset PIN
- Reset Web Password
- Reissue Customer Account

- Replace Card
- Set Red Flag
- Allow Custom Transaction 1-5

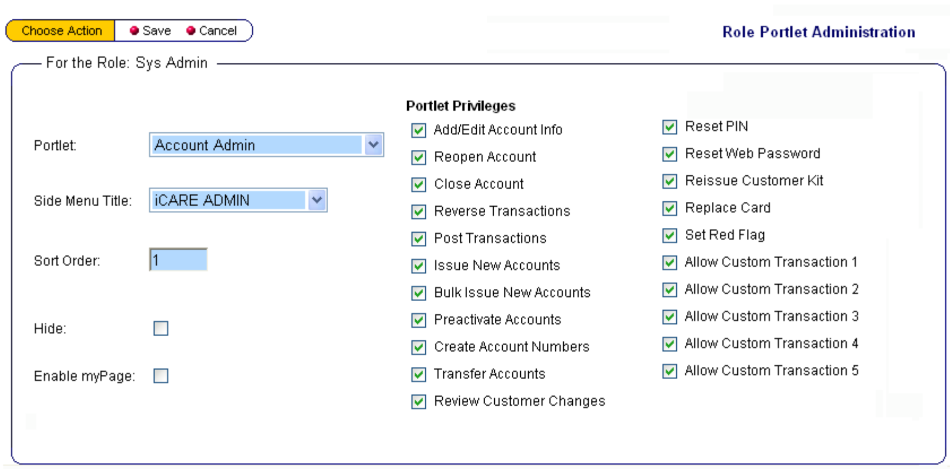
Many of these customized features are discussed within this document. However, please contact a MICROS Account Representative in order to receive a complete overview of how these features behave and their purposes.

Enable Customized Privileges

1. Navigate to Admin | Portal | Roles | Portlets
2. Select the User Role and click Configure



3. Click Add or select an existing Portlet and click Edit from the top menu bar
4. Use the drop-down lists provided to specify the Portlet Name, Side Menu Title (in which Side Menu the portlet will exist), and Sort Order (how the portlets will be ordered)



5. Select Enable myPage if the role portlet will appear on user roles' mypage home page

Account Administration portlets options may be used in Admin | Portal | Roles | Account Admin.

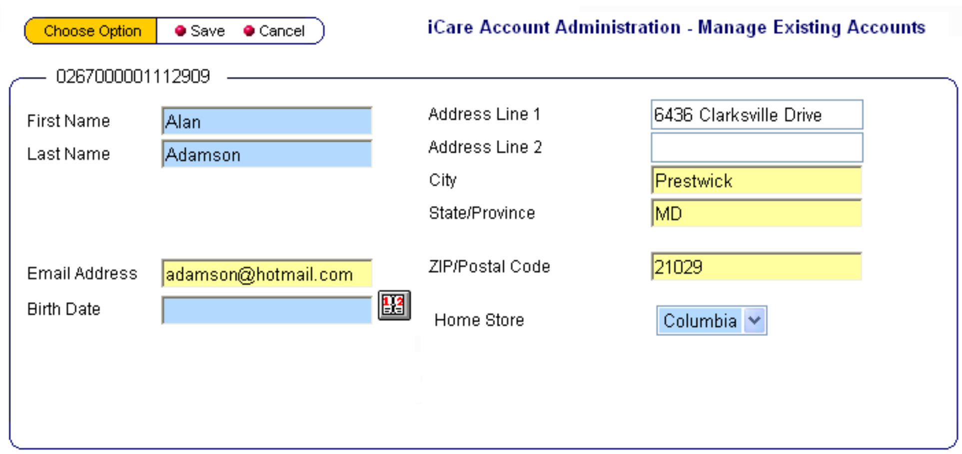
Account Administration is the only module with modifiable portlets. These portlets and their functionality are discussed in greater detail in the Account Administration section of this document.

User Interface

Field Background Colors

Throughout the user interface, there are three different background colors applied to fields:

- Blue fields denote required fields
- Yellow fields denote fields that are required but may be configured to be only optional
- No color fields are optional



Account Administration Description

An enterprise has the ability to manage any gift, payment, or loyalty accounts. Through the Account Administration page, users can:

- Manage Existing Accounts
- Issue New Account(s)
- Bulk Issue New Account(s)
- Pre-Activate New Account(s)

- Review Customer Changes

iCare Account Administration

Name	Description
Manage Existing Accounts	Detailed review, post adjustments, post new transactions, close and reopen.
Issue New Account(s)	Create new account with customer info.
Bulk Issue New Account(s)	Create one or more new accounts.
Pre-activate New Account(s)	Pre-activate one or more accounts.
Create Card Numbers	Create list of new account card numbers.
Review Customer Changes	Review Manually Edited Customer Information

Coupon Administration Description

Coupons are usually administered as an award for a loyalty program when the designated point threshold is met for coupon issuance. Coupons can be automatically printed at the POS when customers reach the point threshold. The Campaigning module supports the issuance of coupons via emails. Coupons can also be configured as “ad-hoc” coupons. This setting allows coupons to be issued to individual accounts, i.e., a customer called and had a poor experience and the location wants to offer the customer 50% off their next visit. A coupon could be added to the account so that it can be used at a later time. Adding ad-hoc coupons is done through the Coupons portlet.

Note *New Coupons may only be issued to customers with existing customer details available in the system. Information such as name, phone number, etc., is required in order for new coupon issuance.*

Coupons are created in the iCare GPL Configuration section of the iCare Portal. Please refer to Coupon Types for more information on creating and defining Coupons.

When selecting the Coupons feature, the user will be able to:

- Issue New Coupon(s)
- Manage Existing Coupon(s)

iCare Coupon Administration

Name	Description
Issue New Coupon(s)	Issue New Coupon(s)
Manage Existing Coupon(s)	Update/Reissue Coupon(s)

iCare Configuration Description

The following briefly describes iCare Gift, Payment, and Loyalty Configuration. Please refer to iCare Gift, Payment, and Loyalty Configuration for more information.

iCare Gifts, Payments and Loyalty

Name	Description
Programs, Cards, Coupons and Rules	
Customer Attributes, Signup Sources	
Initial iCare GPL Setup and Configuration	
Standalone Terminal Configuration	

iCare Programs

GIFT AND DEBIT PROGRAMS

Gift cards are also called debit cards or payment cards. These cards function like a bank debit card. After the card is loaded with a specific amount of purchasing power (i.e., cash), it can be used at an organization's stores to purchase goods and services. Options include:

- Cards may be issued for a fixed amount (e.g., a $25 gift card), or the amount can be set when the card is purchased at the POS (e.g., "I'd like to buy a gift card for $43.00.")
- The card may be re-loadable. That is, the customer can have the option of deciding to increase the buying power of the card (i.e., add cash).

- The customer details associated with an account may be unknown/anonymous. For example, a customer name may be displayed as ‘New Customer’ in the database, or it may be associated with a specific customer’s account (i.e., name, address, etc.).

CREDIT CARD PROGRAMS

An organization can use iCare to issue its own in-house credit card. An iCare credit card functions just like a commercial credit card: The card issued to an individual (or a business) is used for purchases. A credit limit can be set, beyond which the user cannot spend. At the end of a period (usually a month), the card holder is invoiced for the amount of their purchases.

Note	*An iCare Credit Card program cannot be linked to an actual commercial credit card, such as a Visa card for billing purposes.*

COUPON PROGRAMS

iCare allows an organization to create one or more programs that issue coupons to customers. The coupon programs can be customized in a variety of ways. Some options include:

- Coupons may be issued that entitle the customer to a discount (an amount or percentage) or to a free menu item
- Coupons may be issued at the point of sale or through an mailing campaign based on existing gift and/or loyalty account holder that has been entered into the database
- Rules may be applied to the coupon that restrict when it is issued and how it may be used (i.e., expiration dates)

Note	*These coupons are different from the Coupons created via the Account Administration module. These coupons are intended to be administered as awards for gift, payment, and loyalty programs.*

LOYALTY PROGRAMS

Loyalty programs may be created that track a customer’s activity, with the intent of rewarding the customer for specific behavior. Some options include:

Tracking customer activity on the basis of visits, on the amount spent, or on the purchase of specific menu items or groups of menu items.

- Customer activity is recorded using a point system. Points can be given any name: points, chips, dollars, etc.
- Eligibility rules can be created that define when and how points are awarded to a customer, based on the purchase of specific items or amounts

A Loyalty Program can offer Awards to reward specific customer activity. Examples of awards might include:

- A discount applied to the current transaction
- A coupon issued
- Bonus loyalty points applied to the customer's account
- Stored Value credit that can accumulate and be spent at a later date

Rules

The purpose of coupons, loyalty, and aware programs is to encourage specific behavior, such as return visits or purchases of specific items or amounts. To facilitate this, iCare provides a rich set of rules. Rules include:

- Card
- Eligibility
- Loyalty
- Redemption
- Load Bonus

After these rules are created, they are linked to the appropriate program. These rules set up guidelines as to how the programs will behave. For example, the card rule specifies which card numbers will be used for a particular program. Or, for example, a loyalty program that states an account holder receives a free dessert on their birthday; the eligibility rule can be set up to only allow the server to discount desserts and will not be able to apply their discount towards a steak and lobster dinner.

Cards

CARD APPLICATIONS

Debit and credit card programs can be used in a variety of ways. They can be:

- Sold (or given away) to guests
- Set up as credit cards, similar to house accounts
- Issued as management accounts
- Used in-house to manage employee meal programs

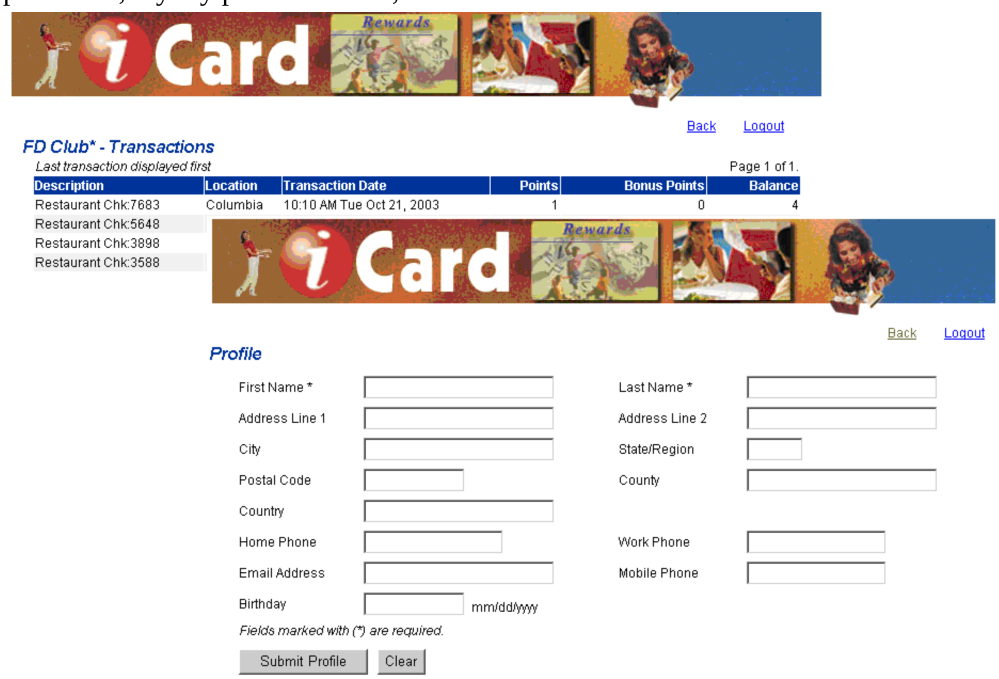
CARD TYPES

For the convenience of its customers, MICROS created a proprietary card format called iCard, which uses a 16-digit account number. But iCare can be used with most cards that can be coded with an alphanumeric string as an account number (up to 32 characters.)

Cards generated by other vendors are referred to in this document as foreign cards. Foreign cards occasionally require unique configuration fields. Fields have been created in the iCare database to accommodate most foreign cards. From an operational standpoint, there is no difference between iCard and foreign cards—there is nothing one type of card can do that the other cannot.

myiCard.net

Organizations that use iCare can provide their account holders the convenience of using myiCard.net to track the balance and activity of programs associated with their cards by logging in to the myicard.net website. After entering their card number, the site will provide information on the card's activity, such as recent purchases, loyalty points accrued, etc.



Customers can use the site to enter information for a new customer profile, or to change information on an existing profile. To insure confidentiality, no existing customer information is displayed at this web site.

Account Administration

Overview

Account Administration allows a privileged user to:

- Manage existing accounts,
- Issue new accounts,
- Bulk Issue new accounts,
- Pre-activate new accounts, and
- Create card numbers, and
- Review Customer Changes

Access Account Administration

1. Login as Sys Admin
2. Navigate to iCare Admin | Account Admin

Note	*These options may be configured according to the needs of the organizations. Throughout this document, for example, "iCare Config" may also be labeled "GPL Config" or "iCare GPL".*

From this menu, you can choose the iCare option you want to update or configure. The following image shows all of the options available through the Account Administration Portlet:

iCare Account Administration

Name	Description
Manage Existing Accounts	Detailed review, post adjustments, post new transactions, close and reopen.
Issue New Account(s)	Create new account with customer info.
Bulk Issue New Account(s)	Create one or more new accounts.
Pre-activate New Account(s)	Pre-activate one or more accounts.
Create Card Numbers	Create list of new account card numbers.
Review Customer Changes	Review Manually Edited Customer Information

Manage Existing Accounts

The Manage Existing Accounts section of Account Administration gives you the ability to update and maintain accounts that already exist in the system. You will be able to post transactions, replace cards, review account balance information, add customer notes, as well as a whole host of other account-specific activities.

For more information on managing existing accounts, please refer to Manage Existing Accounts.

Issuing and Pre-Activating Accounts

Organizations can issue and pre-activate new accounts from within the Account Administration area of the iCare Product. Accounts may be issued/activated one at a time or in bulk.

Issue vs. Activate

Issue and Activate are two terms that are used to describe the actions applied toward the gift cards in order to make them functional. Although Issue and Activate sound similar, they do differ.

Issuing allows cards to immediately be usable - no store location activation is required. Essentially, when gift cards are issued, a value is immediately loaded onto them.

In order for a gift card to be activated, it must first be pre-activated. Pre-activation is the act of assigning a value to a set of cards, but not making the cards active. This means that, although an amount is associated with the card, is not yet able to be redeemed for any value. After a cards are pre-activated, they will be activated in-store by a cashier or member of the serving staff. Pre-activation only occurs online. For example, supermarkets which sell $10, $25, and $50 gift cards; the gift cards have a pre-activated amount, however they are unable to be redeemed until they are activated at the store. As such, when the cashier sells a $10 gift card, the pre-activated amount restricts the card to the $10 amount.

Note	*Pre-Activation is rarely used.* *Issue is the most common method for loading cards with value, as it is a one-step act for making cards ready for use.*

Issue and Activate functions require two separate keys at the POS. Since they behave differently, it is important to configure these keys according to the specifications outlined in the Installation Guides.

For more information on issuing or activating new accounts, please refer to Issue New Accounts, Bulk Issue New Accounts, or Pre-Activate New Accounts.

Create Card Numbers

The Account Administration area of the iCare Product gives System Administrators the flexibility of creating new card numbers for their organization. MICROS typically provides the organization the first batch of card numbers for card printing. After which, organizations may maintain this aspect of their gift and loyalty product on their own.

For more information on creating card numbers, please refer to Create Card Numbers.

Review Customer Changes

Organizations may monitor when iCare customers update their personal information on the myiCard.net website. This helps to alleviate the problem of incorrect records maintained in the database. Organizations may choose to approve or reject customer updates.

Fore more information on reviewing customer changes, please refer to Review Customer Changes.

Manage Existing Accounts

Managing accounts refers to the activities you can do to review and update the information associated with a specific customer account. The Manage Existing Accounts menu allows you to:

1. Search for an existing account, using a variety of selection criteria

2. Edit the customer information listed for an account
3. Close or reopen an account
4. View the POS transaction history for an account
5. Post/Reverse Transactions
6. View/Add Customer Note

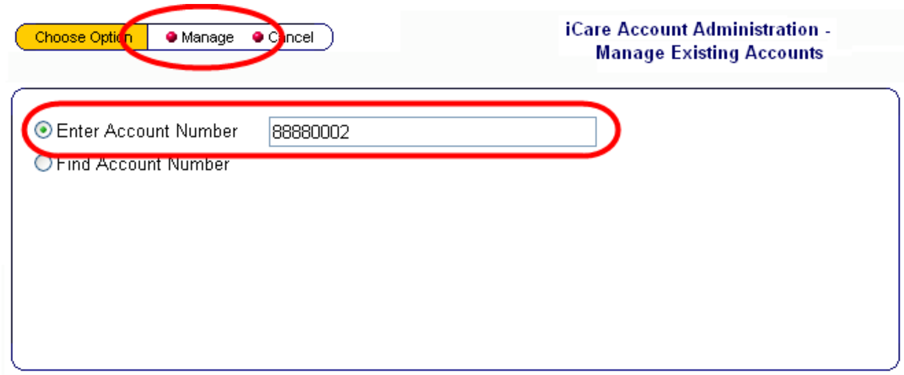
To access the Manage Existing Accounts menu, navigate to iCare Admin | Account Admin | Manage Existing Accounts. These functions are discussed in greater detail below.

Select an Existing Account

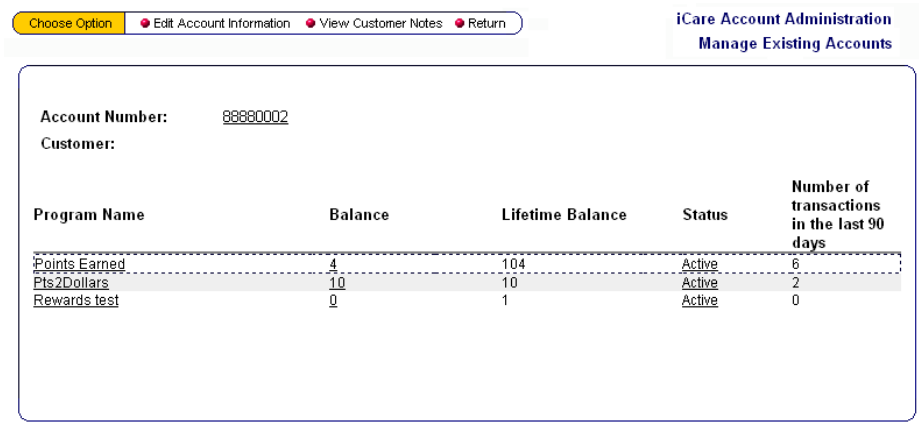
Whenever any modifications or review of accounts must take place, the account number must be located. There are a number of ways to locate the account number. Depending on whether you know the account number or do not know the account number will determine what search method you might choose to use.

Account Number is Known

1. Navigate to iCare Admin | Account Admin | Manage Existing Account
2. Select Enter Account Number, enter the Account Number, and click the Manage button from the top menu bar

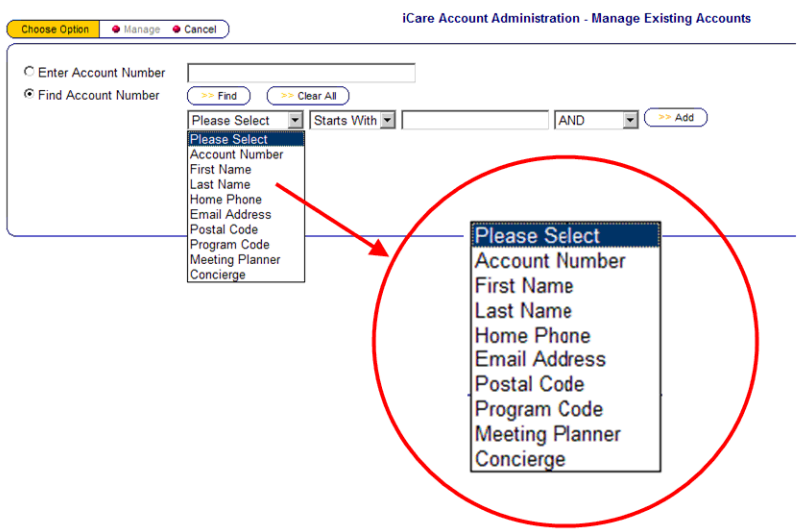


3. Customer Data for this account number will display, as well as the status of each program assigned to the card number:



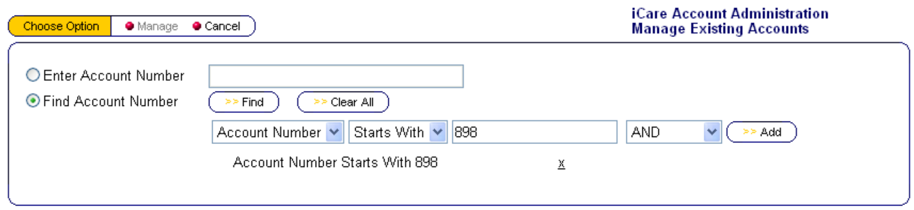
ACCOUNT NUMBER IS NOT KNOWN

1. Navigate to iCare Admin | Account Admin | Manage Existing Account
2. Enable the option bit Find Account Number
3. The Find Account Number criteria fields will appear and you can search based on known information:

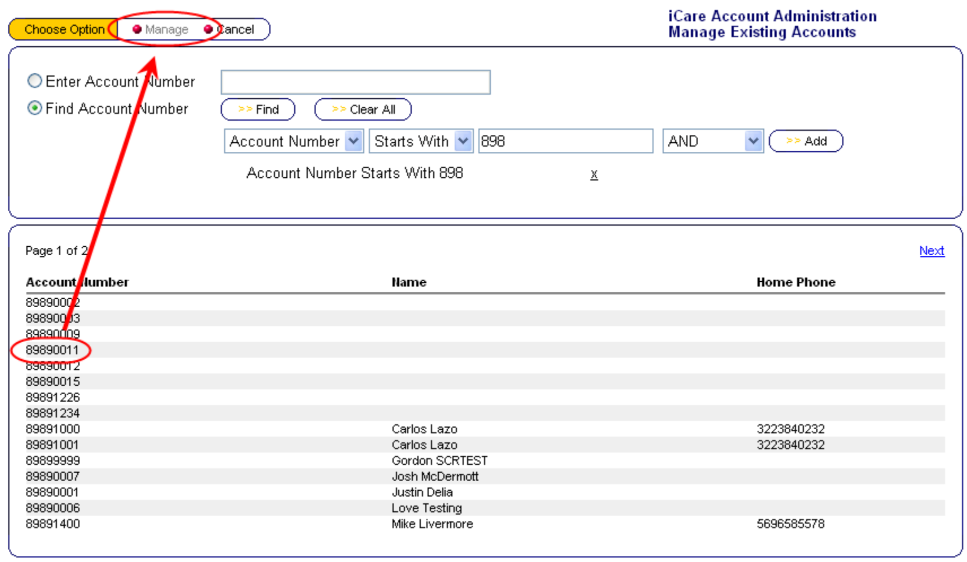


4. Then, from the next drop-down box, select how to use the chosen criteria. Your choices are Starts With, Equal To or Contains

A broad search on a single parameter may return up to 200 records. For example, in one system, a search for customers with a common last name such as “Smith” returned 160 records, listed on 11 pages. You can use the And, Or, and Add buttons to refine, and add selection criteria, allowing you to narrow the list

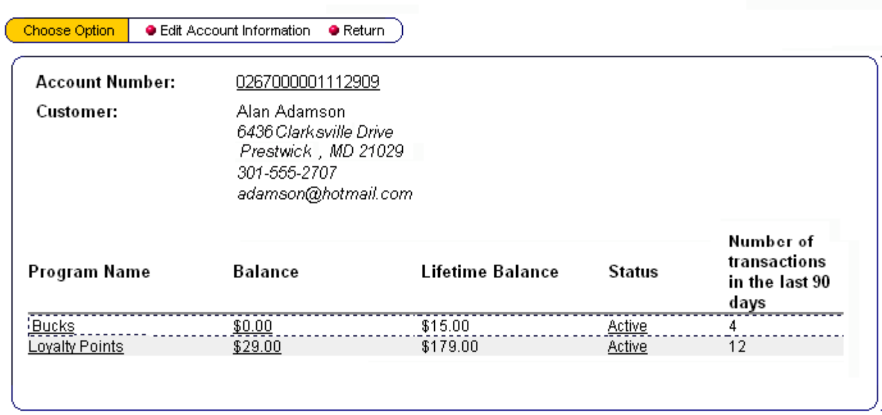


5. Once you have entered all your search criteria, click Find
6. The accounts matching the entered criteria will appear; highlight the desired record and click Manage from the top menu bar:



Manage Existing Accounts

Once you have selected an existing account to manage, the screen similar to the following will appear:



From this screen, the standard options include:

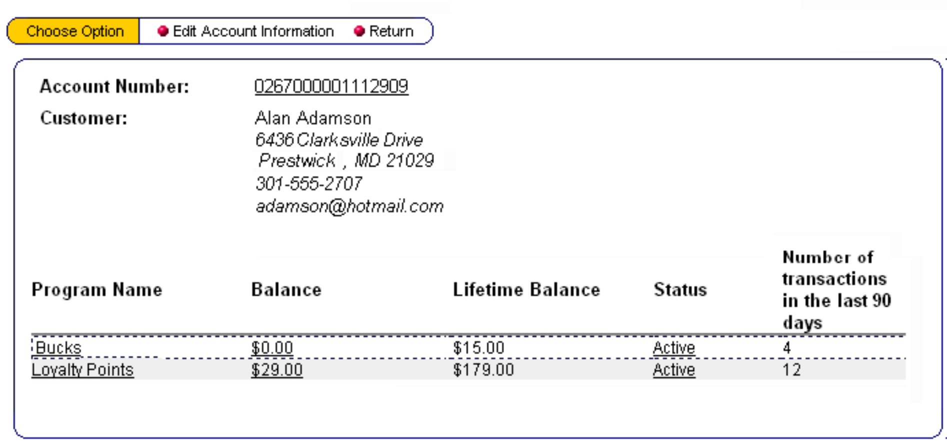
- Edit the customer account information for an existing account
- Transfer an Account
- Close the account/change the account status

There are other additional activities that can be added to the functionality of the iCare interface on a per user basis.

After you have selected an account, you may:

- View the point details and card history for each program on the selected card
- View the POS transaction history for a program, including issues, redemptions, etc.
- Post a transaction to a card
- Void/Reverse a transaction from a card

Screen Overview

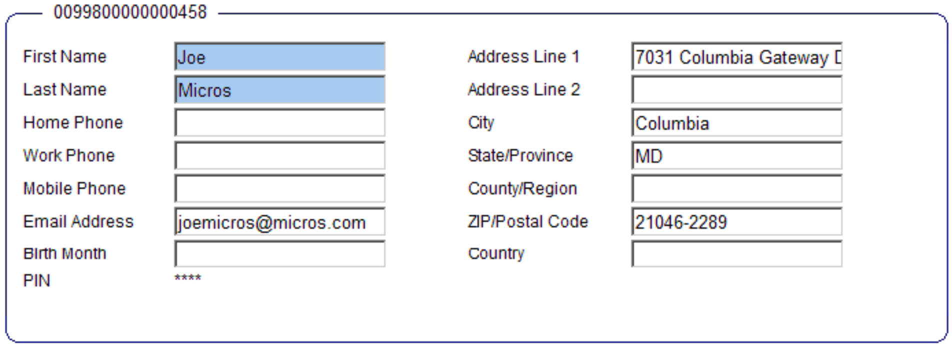


Field	Description
Account Number	The account number associated with this account and customer. Click on the Account Number to edit or transfer the account
Customer	The name of the customer
Program Name	Identifies which program the associated information is applied to. Click on the Program Name to view a summary of the program information
Balance	Shows the current balance for this account for the given program
Lifetime Balance	Shows the balance associated with the account since the account was initially opened through the current date.
Status	Shows the status of the account: Active, New Issue, Closed
Number of Transactions in the last 90 Days	Displays the number of transactions that have been posted to the account within the last 90 day/3 months

Edit Existing Account Information

Once you have selected an account, to change the customer information, you can either double-click the account number from the list, or select the account and then select Manage from the top menu bar.

1. From the Account details window, select Edit Account Information from the top menu bar; the Account Information form appears:

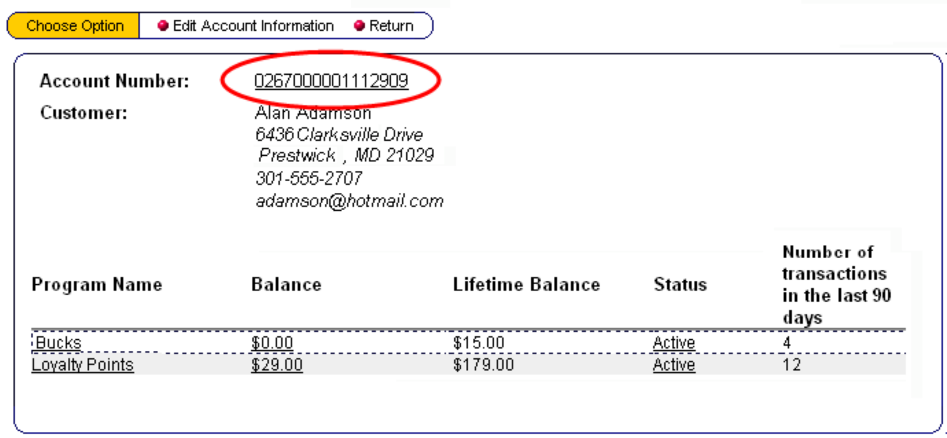


2. Enter and update account information such as name, address, etc.
3. Save

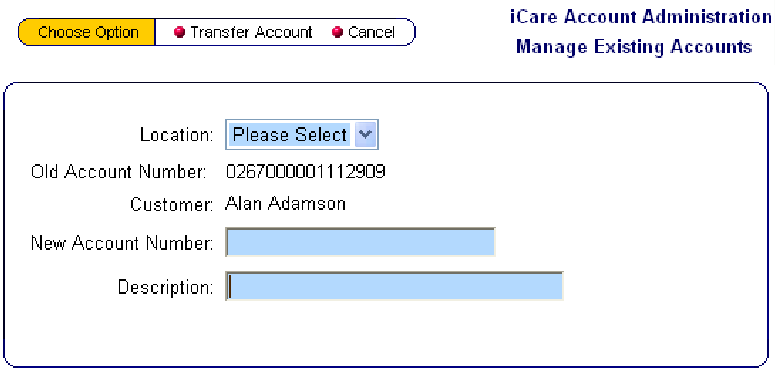
Transfer Account

Customers may request their accounts be transferred. For instance, if a customer has registered his profile via myiCard.net and loses his loyalty card, a System Administrator may access his information by searching his first/last name. Then, the information from the lost card can be transferred to a new card and sent to the customer.

1. Click the Account Number



The Edit Account Number page appears:



2. From this page, you can change the Location for the account and/or enter a New Account Number. Micros also provides a field to enter a description or comments (such as the reason for the change).
3. Click Transfer Account. The information from the old account is transferred to the account number you have just created

Additional/Optional Functions

Additional configuration options includes, but are not limited to:

- Reissue New Customer Kit
- Replace Card
- Reset the PIN for the account
- Reset Password for the account
- View/Add Customer Notes

These tasks are typically considered “custom”, however may be implemented for any organization if they so choose. Usually they require some additional MICROS Implementation. If these features are selected, they will appear in the top menu bar (not all options are displayed):

Note	*These features are primarily used with third party marketing vendors. If you feel any of these options would be of use to your organizations, please contact a MICROS Account Representative.*

Reissue Customer Kit

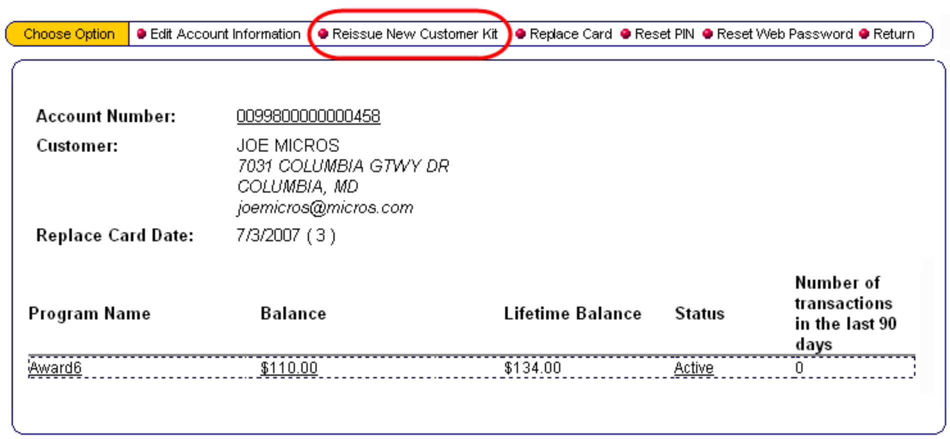
When customers sign up for a Gift, Payment, or Loyalty program, organizations may wish to provide them with information that explains the type of program they are participating in. For example, if an organization has an multi-level milestone award program, they may wish to outline the awards. Such as a free dessert at 100 points, free appetizer at 200 points, $25 off next purchase at 500 points, etc. Therefore, the organization could create a “New Customer Kit” that outlines all the award tiers and contains other important marketing material.

The ability to reissue the New Customer Kit is available in the iCare Account Administration portlet. That way, if a customer never receives her New Customer Kit and would like one reissued, all she would need to do is contact either the restaurant or the System Administrator who could access the Manage Existing Accounts screen and reissue the kit.

Note	*This custom feature requires additional support from MICROS Implementation. Please speak to a MICROS Account Representative if you would like to use this option.*

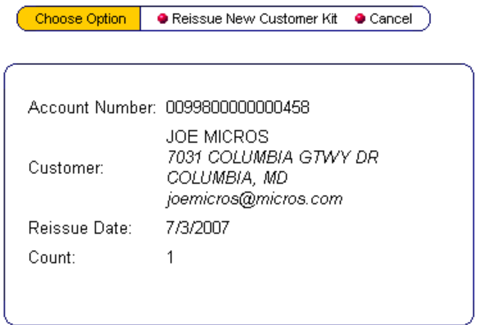
To reissue the New Customer Kit:

1. Navigate to iCare Admin | Account Administration | Manage Existing Accounts
2. Search for/Select the account

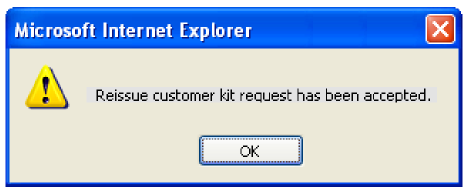


Note	*The account holder must know the account number or have registered his/her personal information online so that the System Administrator has criteria upon which to search.*

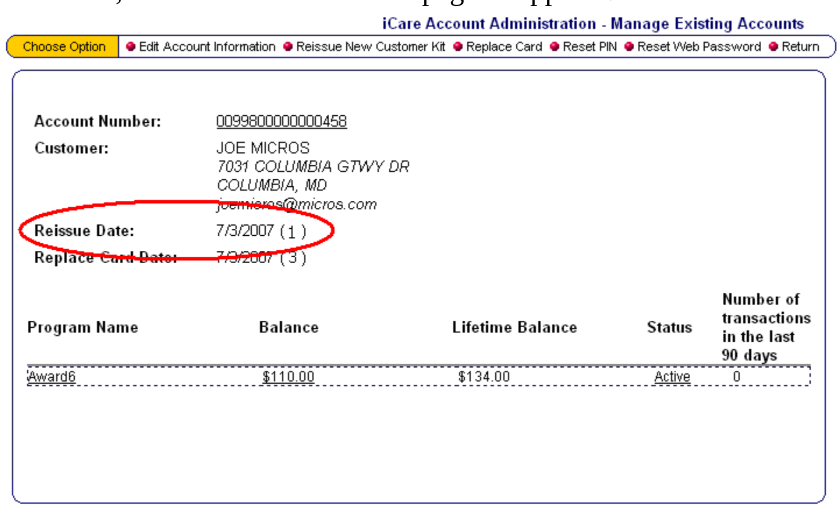
3. Select Reissue New Customer Kit from the top bar menu; the following page will display:



4. Select Reissue New Customer Kit from the top bar menu; a confirmation dialog box will display:



5. Click OK; the main account details page re-appears:



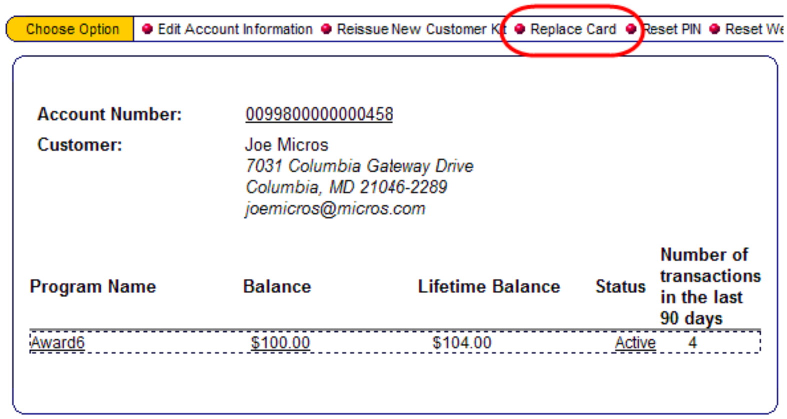
Notice that this time a new field has been added called Reissue Date and the most recent date the card was replaced appears, along with the number of times the card has ever been replaced.

REPLACE CARD

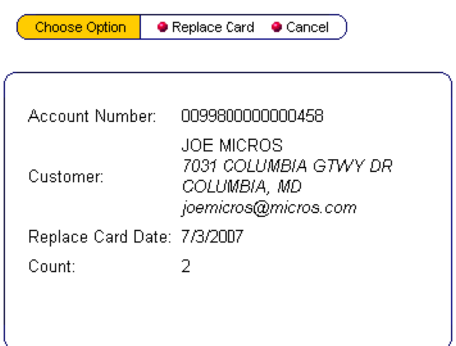
Replace Card is used in conjunction with the Reissue New Customer Kit option. Organizations using the Reissue New Customer Kit option may need to send new account holders a replacement card. In that specific circumstances, the Replace Card option will be used. You can replace the physical iCare card for a customer and track it using the iCare interface. To replace the customer's physical card, issue the new card and then log in to the iCare Account Admin module.

Note	*This custom feature requires additional support from MICROS Implementation. Please speak to a MICROS Account Representative if you would like to use this option.*

1. Navigate to iCare Admin | Account Administration | Manage Existing Accounts
2. Select and open the account for which you want to reissue the card:

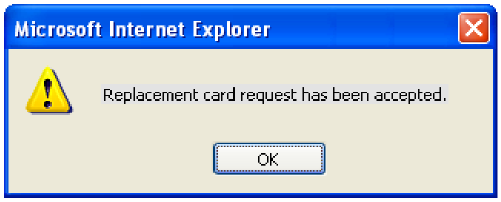


3. From the top menu bar, click Replace Card; the Replace Card dialog box appears:

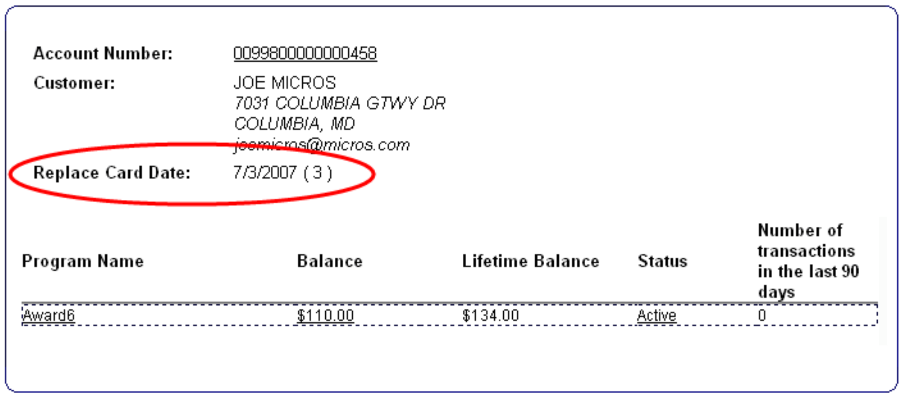


This page shows the Account Number, the Customer Name, the Replace Card date indicating the last time the card was replaced (if applicable) and also the number of times this particular card has been replaced.

4. To replace the card, from the top menu bar on this page, select Replace Card. A confirmation dialog confirming the request for a replacement card appears:



5. Click OK; the main account details page re-appears:



Notice that this time a new field has been added called Replace Card Date and the most recent date the card was replaced appears, along with the number of times the card has ever been replaced.

Reset PIN/Reset Web Password

The Personal Identification Number (PIN) is a a secret code used by iCare users to manage their accounts and review transaction information through the myiCard.net web site. Likewise, the Web Password is also used to access the myiCard.net website. If a user forgets their PIN or Password, or otherwise wants to change it, they may contact the system administrator who can change it for them.

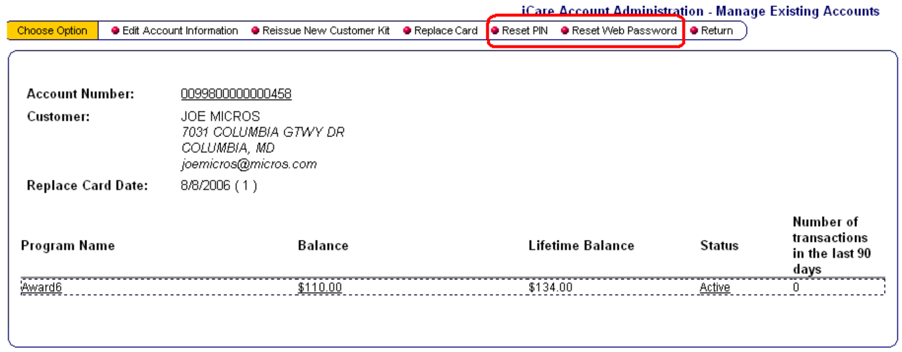
Note *This custom feature requires additional support from MICROS Implementation. Please speak to a MICROS Account Representative if you would like to use this option.*

Users may decide which method, PIN or Password, is more effective for their organization.

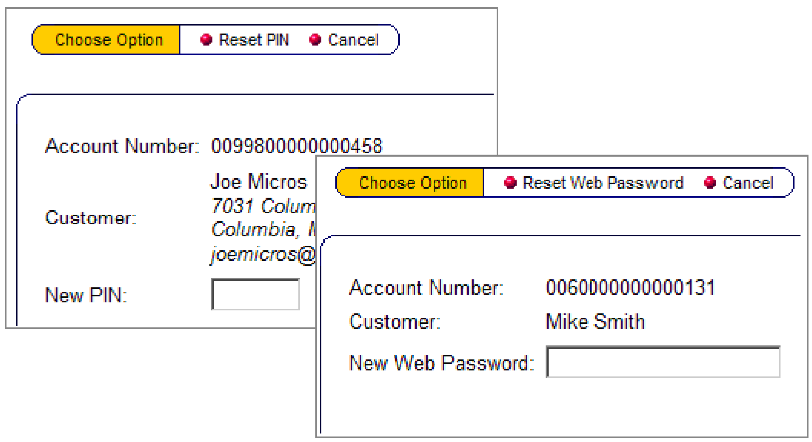
To reset a PIN and/or Web Password:

1. Navigate to iCare Admin | Account Administration | Manage Existing Accounts

2. Search for/select the account:



3. Select Reset PIN (or Reset Web Password) from the top bar menu; the following page(s) will appear:



4. Enter the new PIN (or Password) and click Reset PIN (or Reset Web Password) from the top bar menu; a confirmation dialog box will appear

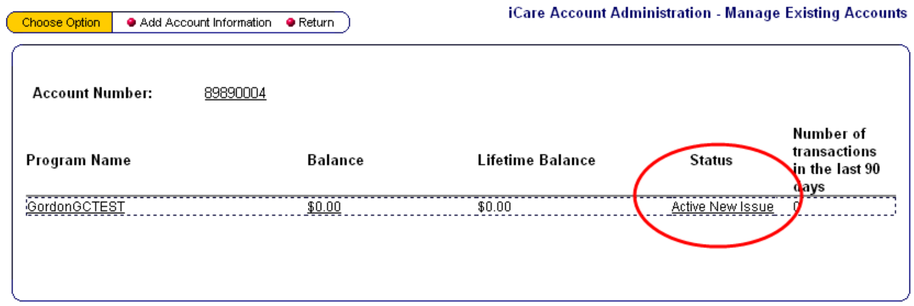
Close or Reopen an Account

Account Administration gives users the ability to close/deactivate and reopen/ reactivate accounts. The uses for this option can vary on a case-by-case basis. It is available to give Administrators as much control over customer account status as possible.

Close an Account

1. Navigate to iCare Admin | Account Admin | Manage Existing Accounts
2. Search for and select the account to be closed

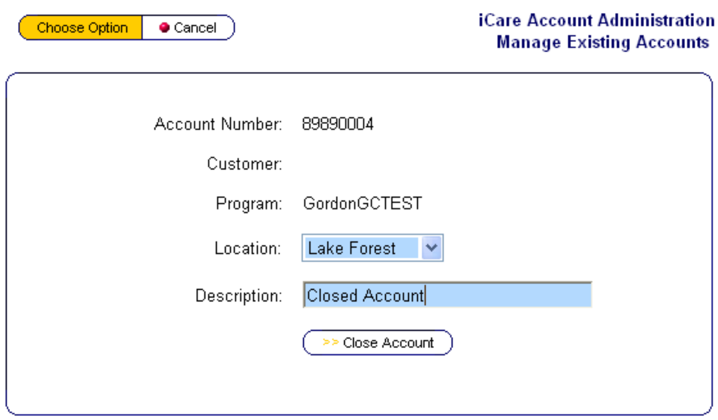
3. Click the link under the Status column:



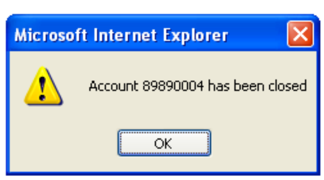
Note — *Status is a term used to describe the state of the account. Statuses include:*

- *Active*
- *Active New Issue*
- *Inactive*
- *Closed*
- *Expired*
-

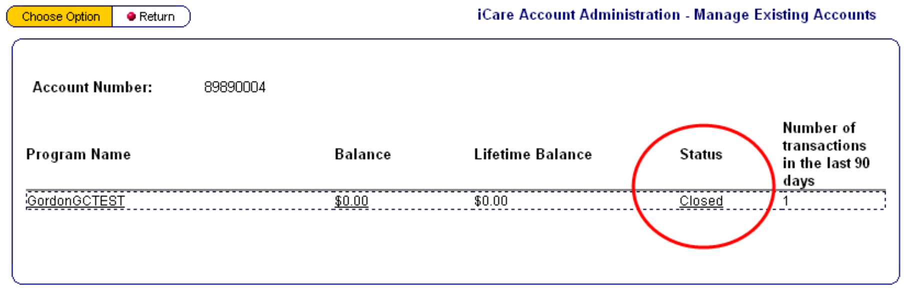
4. Select a location, enter a brief description and click Close Account:



5. Click OK from the confirmation dialog box:



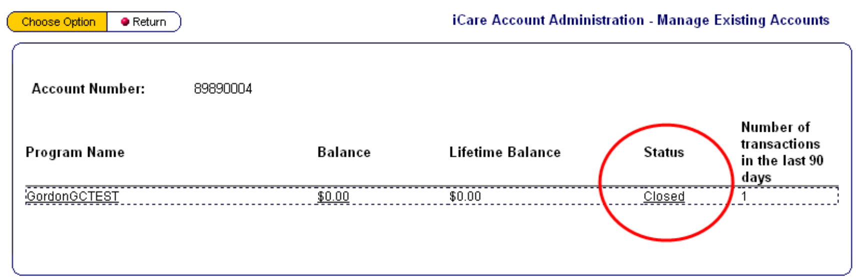
The status of Closed will be reflected under the Status column:



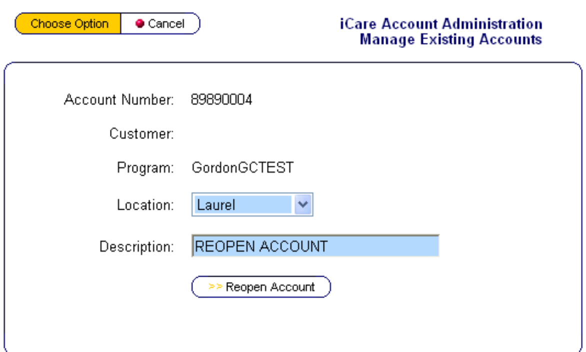
REOPEN AN ACCOUNT

Steps for reopening an account are almost identical to the steps taken to close the account.

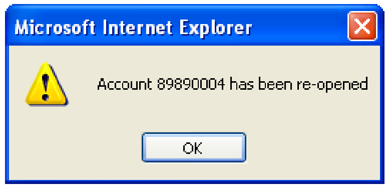
1. Navigate to iCare Admin | Account Admin | Manage Existing Accounts
2. Search for and select the account to be reopened
3. Click the Closed link under the Status column:



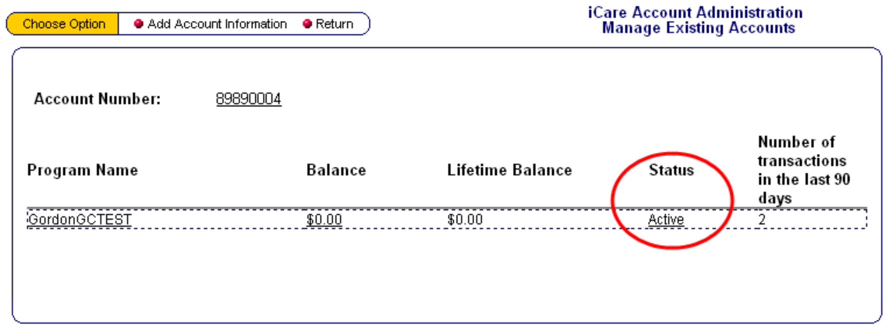
4. Select a location, enter a brief description, and click Reopen Account:



5. Click OK from the confirmation dialog box

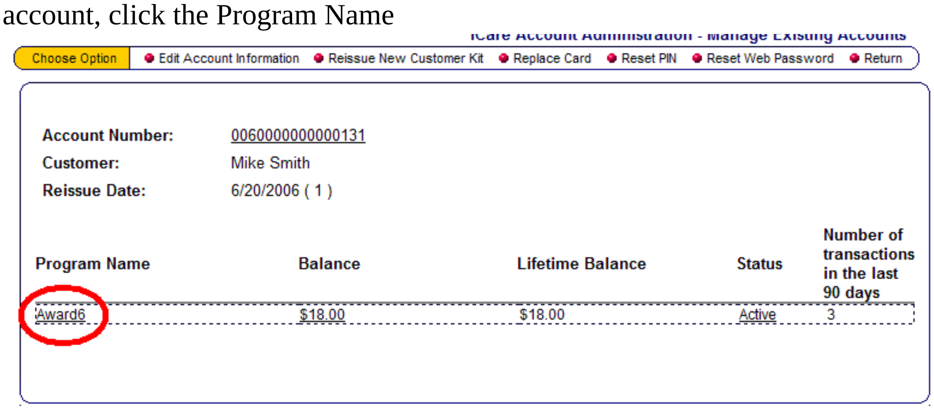


The status of Active will be reflected under the status column:

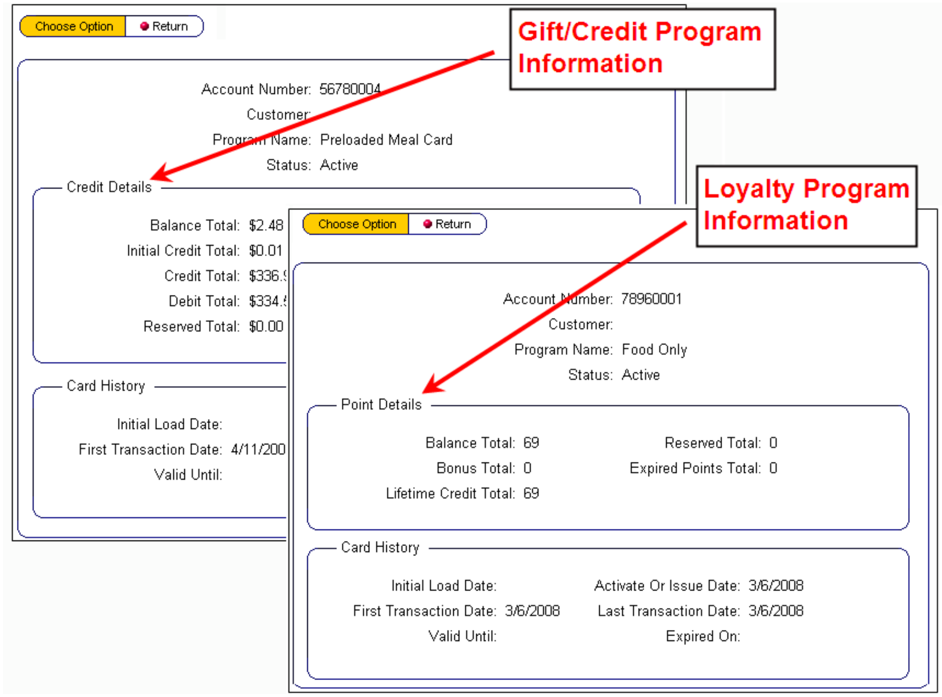


View POS Transaction History

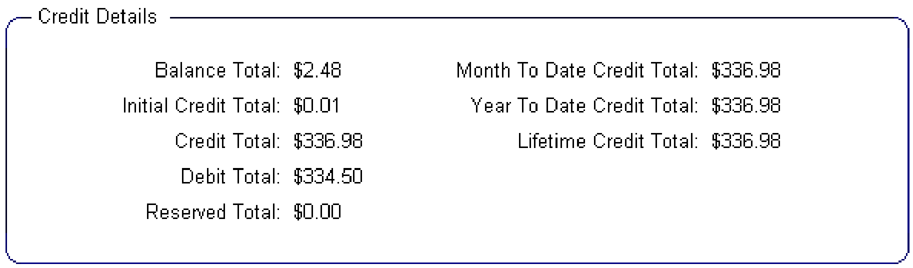
To view the details of the program and an activity summary associated with this account, click the Program Name



The Program summary page appears showing you the details and Card story for the account. The type of program determines the data that will be displayed on this page. Below is an example of how the information for loyalty programs varies from the type of information displayed for gift/credit program:.



GIFT CARDS/CREDIT CARD

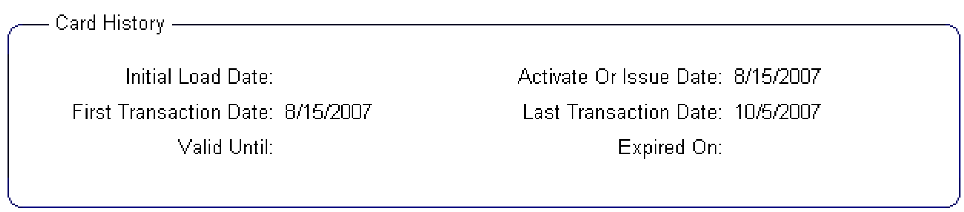


Field	Description
Balance Total	Shows the current balance for this account in this program
Initial Credit Total	The amount of credit applied to the card when the account was first issued
Credit Total	The current amount of credit balance for the account
Debit Total	The current amount of debit balance for the account
Month to Date Credit Total	The amount of the credit that has been applied to the account within the current calendar month
Year to Date Credit Total	The amount of the credit that has been applied to the account within the current year
Lifetime Credit Total	This area displays the total amount of credit applied toward the account over its lifetime
Reserved Credit Total	**CREDIT CARD ONLY** Displays how much of the balance is kept “in reserve”, or the lowest amount of positive balance that is allowed to be in the account. The balance is not permitted to fall below the specified amount. Any transaction causing the balance to fall below the reserve total will be declined.

POINTS TO DOLLARS

Field	Description
Balance Total	Displays the current point balance
Bonus Total	Displays the balance of any bonuses applied to the account
Lifetime Credit Total	This field shows the amount of credit or stored value that has accumulated on the card in the duration of its existence
Reserved Total	This field shows the amount below which the amount may not be charged
Expired Points Total	Displays all points that have expired or not been used within a defined period of time for the card program

CARD HISTORY (FOR ALL TYPES OF CARD PROGRAMS)



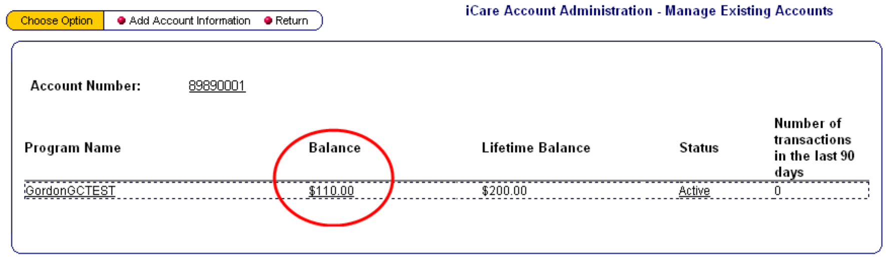
Field	Description
Initial Load Date	Shows the date the card was first loaded with a value
First Transaction Date	Displays the date the first transaction against the card occurred
Valid Until	Displays an expiration date (if any)
Activate or Issue Date	Shows the date the card was activated or issued
Last Transaction Date	Shows the date of the last transaction
Expired On	Displays the date the card expired (if any)

Edit Transactions

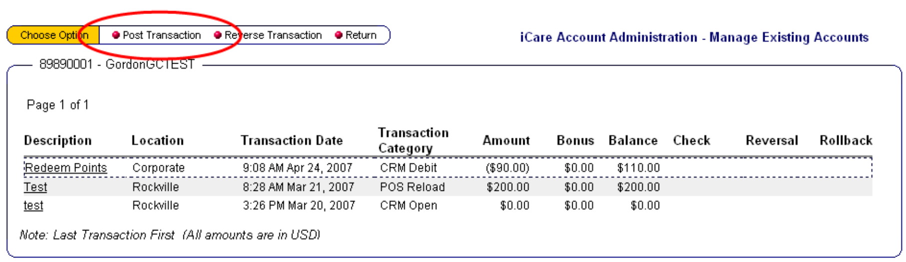
Transactions for gift and loyalty cards can be both posted and reversed from within the Account Administration module. The post transactions and reverse transaction steps are almost identical for gift and loyalty cards.

Post a Transaction

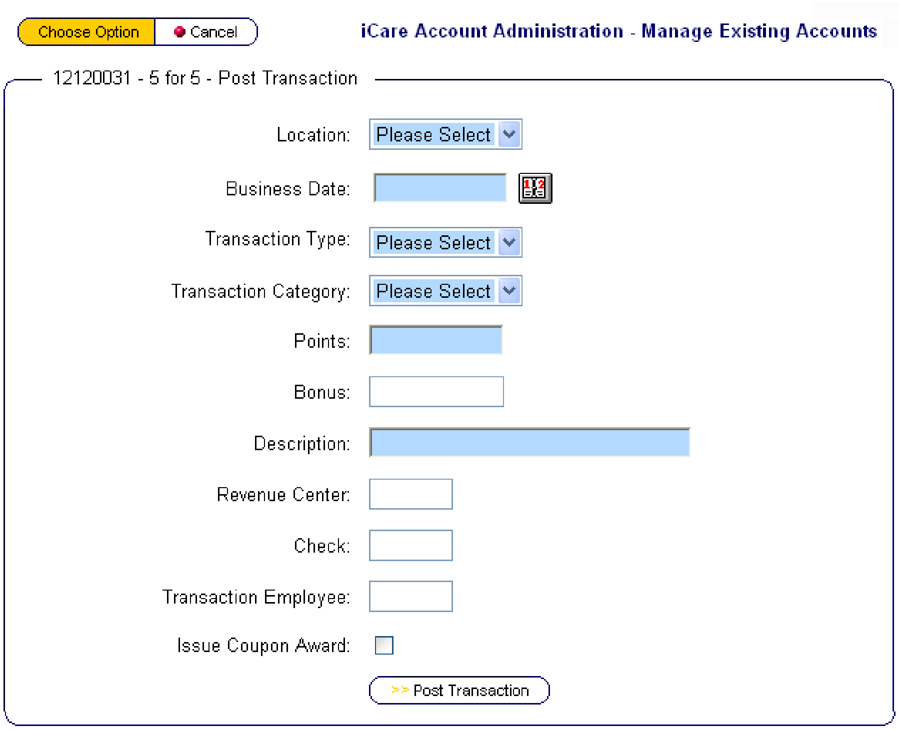
1. To post a transaction to an existing account, click the Balance on the main account screen:



2. Click Post Transaction from the top menu bar



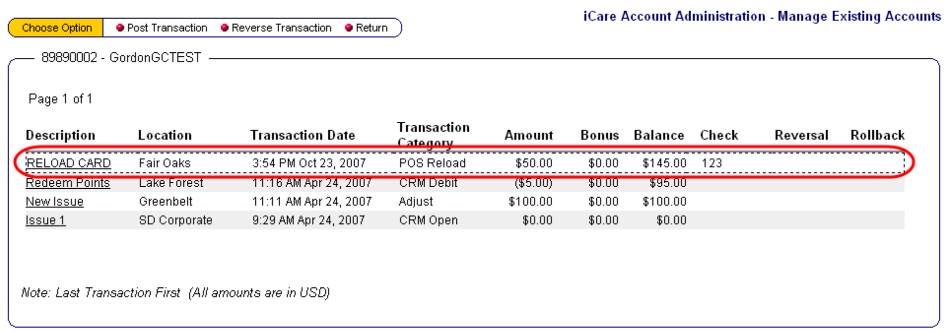
3. Modify the Post Transaction page will appear according to the table below:



Field	**Description**
Location	Specify the location where the transaction will be posted
Business Date	Enter the business date of the transaction
Transaction Type	Specify the transaction type (credit = adding value; debit = removing value)
Transaction Category	Specify the category of the transaction Selecting credit will give you Adjust or Reload. i.e., are you adjusting a previous credit or reloading (adding) more credit; selecting debit will allow for Adjust or Purchase, i.e., are you adjusting a previous debit or are performing a purchase which would debit the balance.
Amount	Enter the amount by which the account will be credited/debited
Bonus	Enter any bonus amount
Description	Enter a detailing why this transaction is being posted online

Field	Description
Revenue Center	Specify a revenue center (if necessary)
Check	Enter a check number to which this transaction will be associated
Transaction Employee	Enter the employee to whom this transaction will be identified.
Issue Coupon Award	Enable this option to cause an associated coupons to be issued if the posted transaction achieves the necessary threshold for coupon issuance. For example, if a coupon is issued at 100 points and a transaction is posted which meets/exceeds the point threshold, then the coupon will be issued if the option is enabled. NOTE: this option is designed to work with the Campaigning Application.

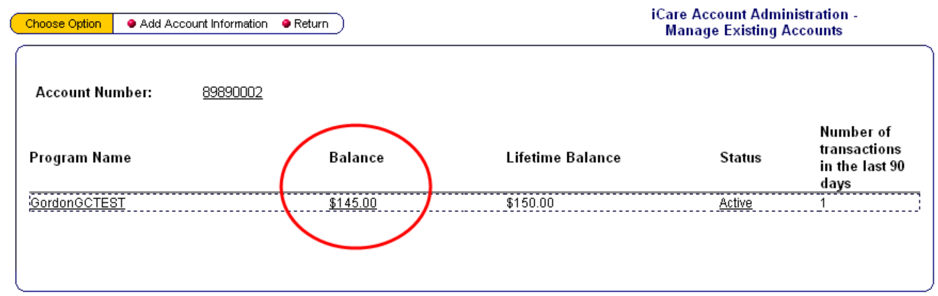
4. When you are complete, click the Post Transaction button; the new entry will appear on the balance summary page:



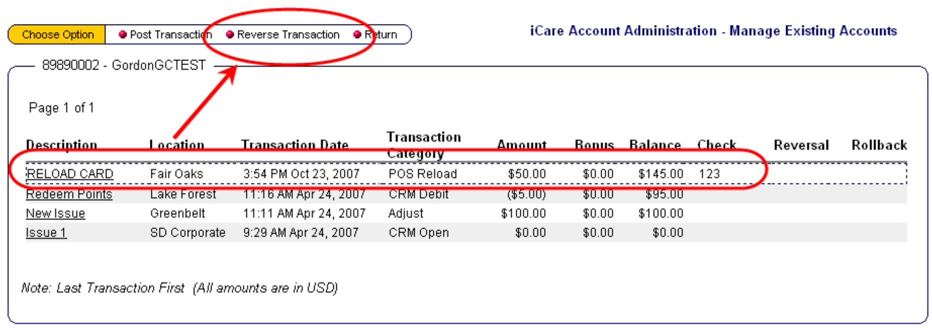
Reverse a Transaction

Periodically, transactions may need to be reversed. When reversing a transaction, a reason code may be required. Reason Codes are configured within the iCare Configuration Module. For more information, please refer to Reason Codes.

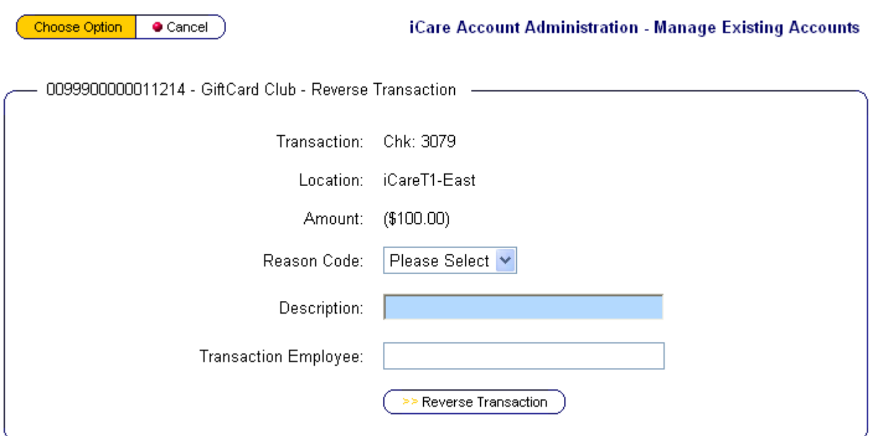
1. To reverse a transaction on an existing account, click Balance from the main account page



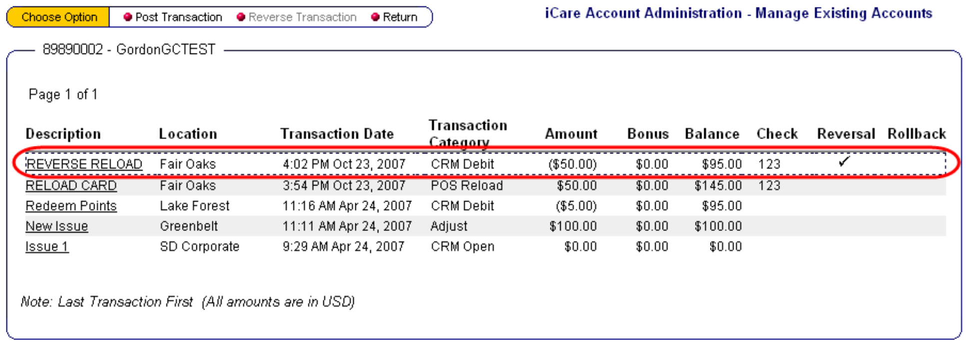
2. Highlight the transaction to be reversed and click Reverse Transaction from the top menu bar



3. Enter a description and select a reason for the reversal and click the Reverse Transaction button from the bottom of the page:



The balance summary will re-appear with the updated information; note the check mark in the Reversal Column to the right:

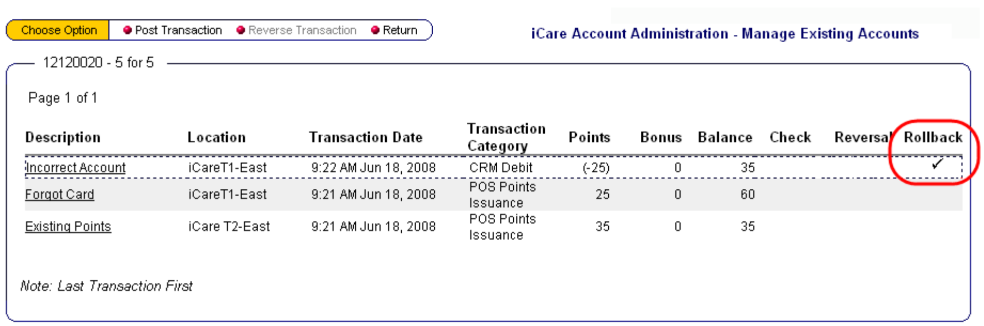


Description	Location	Transaction Date	Transaction Category	Amount	Bonus	Balance	Check	Reversal	Rollback
REVERSE RELOAD	Fair Oaks	4:02 PM Oct 23, 2007	CRM Debit	($50.00)	$0.00	$95.00	123	✓	
RELOAD CARD	Fair Oaks	3:54 PM Oct 23, 2007	POS Reload	$50.00	$0.00	$145.00	123		
Redeem Points	Lake Forest	11:16 AM Apr 24, 2007	CRM Debit	($5.00)	$0.00	$95.00			
New Issue	Greenbelt	11:11 AM Apr 24, 2007	Adjust	$100.00	$0.00	$100.00			
Issue 1	SD Corporate	9:29 AM Apr 24, 2007	CRM Open	$0.00	$0.00	$0.00			

Note: Last Transaction First (All amounts are in USD)

ROLLBACKS

Periodically, an iCare transaction may not properly be interpreted by the system. In these instances, iCare will revert back to the previous known state of the account. For instance, an account with 35 points is credited with 25 more points, thus making 60 total points on the account. However, the transaction was not performed correctly. Since iCare cannot process the 25 point credit, the system will “roll back” the point balance to the last known balance of 35. When this happens, a check mark will be displayed under the Rollbacks column:



Description	Location	Transaction Date	Transaction Category	Points	Bonus	Balance	Check	Reversal	Rollback
Incorrect Account	iCareT1-East	9:22 AM Jun 18, 2008	CRM Debit	(-25)	0	35			✓
Forgot Card	iCareT1-East	9:21 AM Jun 18, 2008	POS Points Issuance	25	0	60			
Existing Points	iCare T2-East	9:21 AM Jun 18, 2008	POS Points Issuance	35	0	35			

Note: Last Transaction First

View/Add Customer Notes

The iCard Customer Note feature allows an account administrator to associate notes with an account to keep track of any issues that may arise. Notes can be categorized by any classification the organization decides upon. New note categories can be added and existing categories can be modified.

Privileged users may have the ability to assigned a red flag to customer notes. Red flags imply some issue with the account. The red flag significance is determined by the organization. Please note, once a red flag is assigned, it cannot be removed and the account will forever have a red flag associated with it.

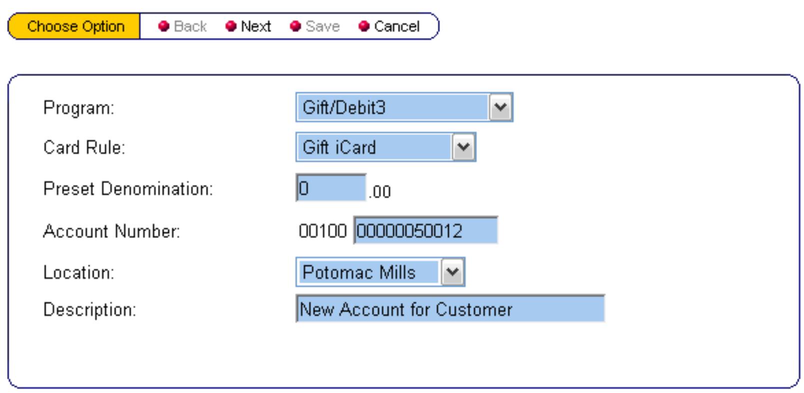
Note	*Because this task is dependent upon options and configurations defined in both the Account Admin section and the iCare Configuration section, it is considered an Advanced Task.* *For more information, please refer to* Advanced Tasks183 *of this document.*

Issue New Accounts

Issuing new accounts is how iCare customer accounts are created. Use this method to create an individual account without any restrictions.

To Issue a New Account:

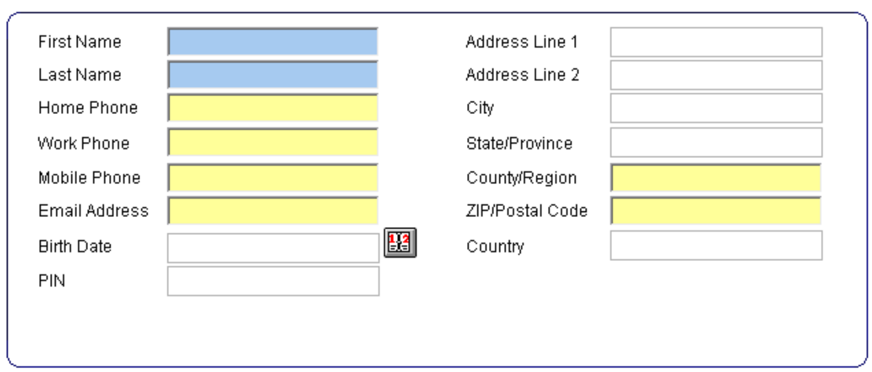
1. Navigate to iCare Admin | Account Admin | Issue New Account
2. Select Issue New Accounts; the Issue New Accounts page appears - modify the fields as instructed by the table below:



Field	Description
Program	Select a gift, payment, or loyalty program
Card Rule	When you select a Program, this field displays the rules that apply to account numbers. These rules may define length, sequence number, etc. If necessary, review the Card Rules for the selected Program in iCare Config.

Field	Description
Pre-Set Denomination	Some programs or card rules you can choose have the ability to store a preset denomination. This preset denomination could be like a sign up bonus or a minimum amount to purchase or even have restrictions to only allow certain denominations. If this field is active, you can enter the amount for the preset denomination to be associated with the card when it is issued. If all of these accounts are for a fixed currency amount (e.g., this is a $25.00 gift card), enter the preset amount.
Account Number	Enter the first number in the sequence to be activated
Location	Select the location (i.e., the store) at which these new accounts will be issued Regardless of whether cards will be used across the organization, a location must be specified for reporting purposes.
Description	Enter text to describe the accounts being activated (ex. 500 cards for fund raiser)

3. Click Next from the top menu bar; the Account Administration page will appear:

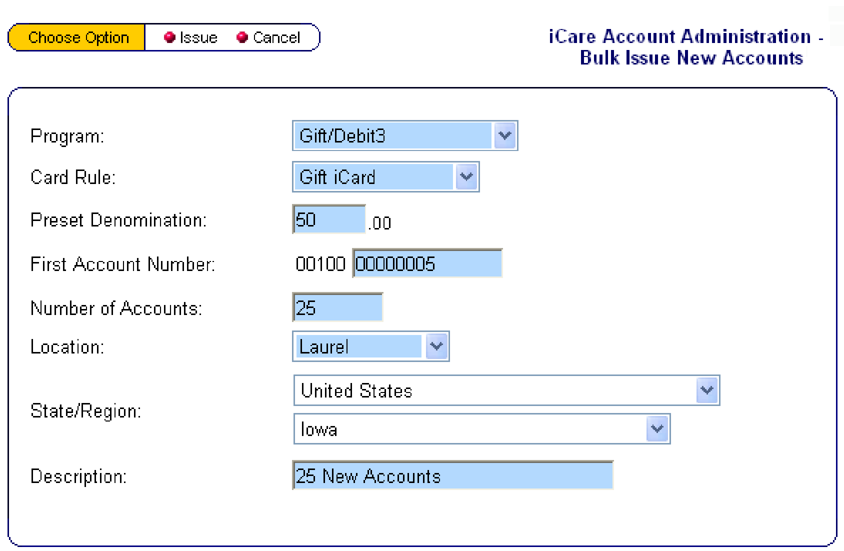


4. Enter customer fields - blue and yellow fields are required
5. Save - A message appears telling you have created a new account, click OK and the main Account Admin menu re-appears.

Bulk Issue New Accounts

You can issue new accounts for groups of cards you have already created by selecting Bulk Issue New Accounts from the iCare Account Administration main menu page. From this page you can create new accounts for a range of cards.

1. Navigate to iCare Admin | Account Admin | Bulk Issue New Account(s); the Bulk Issue New Accounts page appears:



2. Modify the fields as instructed by the table below

Field	Description
Program	Select the program to which these new accounts belong
Card Rule	When you select a Program, this field displays the rules that apply to account numbers. These rules may define length, sequence number, etc. If necessary, review the Card Rules for the selected Program in GPL Configuration
Pre-Set Denomination	Some programs or card rules you can choose have the ability to store a preset denomination. This preset denomination could be like a sign up bonus or a minimum amount to purchase or even have restrictions to only allow certain denominations. If this field is active, you can enter the amount for the preset denomination to be associated with the card when it is issued. If all of these accounts are for a fixed currency amount (e.g., this is a $25.00 gift card), enter the preset amount.

Field	Description
First Account Number	Enter the first number in the sequence to be activated.
Number of Accounts	Enter the total number of accounts to be pre-activated
Location	Select the location (i.e., the store) at which these new accounts will be issued
State/Region	Specify the state and/or region where these accounts will be issued
Description	Enter text to describe the accounts being activated; for example, “25 New Accounts”

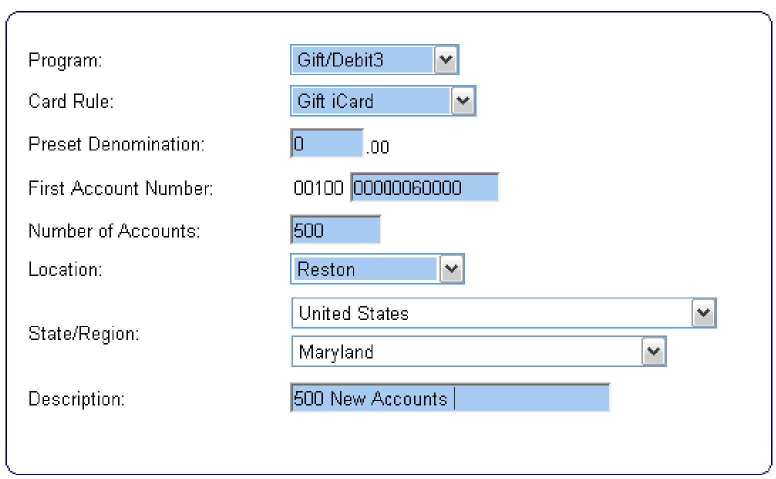
3. Issue

Pre-Activate New Accounts

Pre-activating an account allows you to create new accounts with a preset denomination that are not redeemable until they have been brought to a location and “activated”. So the balance is there, but to use it, you must activate the account.

To pre-activate new accounts:

1. Navigate to iCare Admin | Account Admin | Pre-Activate New Accounts



2. Enter the fields according to the description table below

Field	Description
Program	Select the program to which these new accounts belong
Card Rule	When you select a Program, this field displays the rules that apply to account numbers. These rules may define length, sequence number, etc. If necessary, review the Card Rules for the selected Program in GPL Configuration
Pre-Set Denomination	Some programs or card rules you can choose have the ability to store a preset denomination. This preset denomination could be like a sign up bonus or a minimum amount to purchase or even have restrictions to only allow certain denominations. If this field is active, you can enter the amount for the preset denomination to be associated with the card when it is issued. If all of these accounts are for a fixed currency amount (e.g., this is a $25.00 gift card), enter the preset amount.
First Account Number	Enter the first number in the sequence to be activated.
Number of Accounts	Enter the total number of accounts to be pre-activated
Location	Select the location (i.e., the store) at which these new accounts will be issued
State/Region	Specify the state and/or region where these accounts will be issued
Description	Enter text to describe the accounts being activated

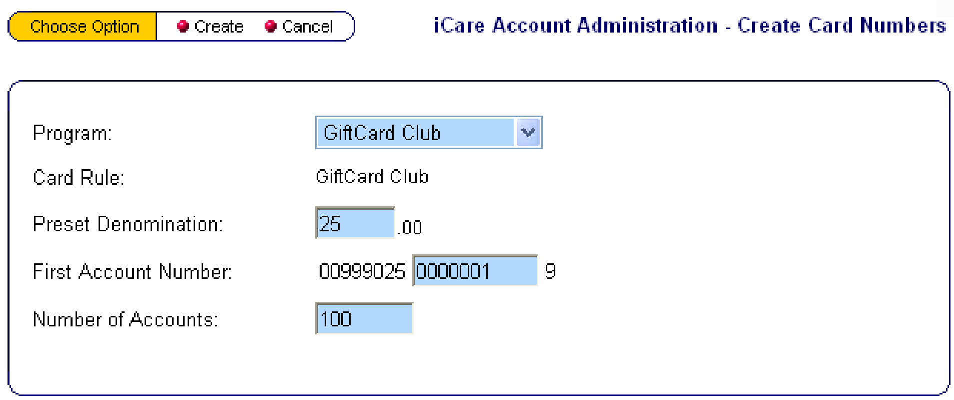
3. Issue
4. The following dialog box will appear - the number is based on the value entered in the Number of Accounts field:

Create Card Numbers

The Create Card Numbers menu allows you to create a list of card numbers that you can provide to your card vendor for card production. Usually the myMicros Implementation Group will create the first batch of credit cards. The System Administrator then has the ability to create more cards for their organization. These cards and associated numbers do not become active until you associate them with a new (or existing) customer account.

To create new card numbers:

1. Navigate to iCare Admin | Account Administration | Create Card Numbers
2. Select a Program, Card Rule, Preset Denomination (if applicable), the first account number, and the number of cards (or accounts) you need:



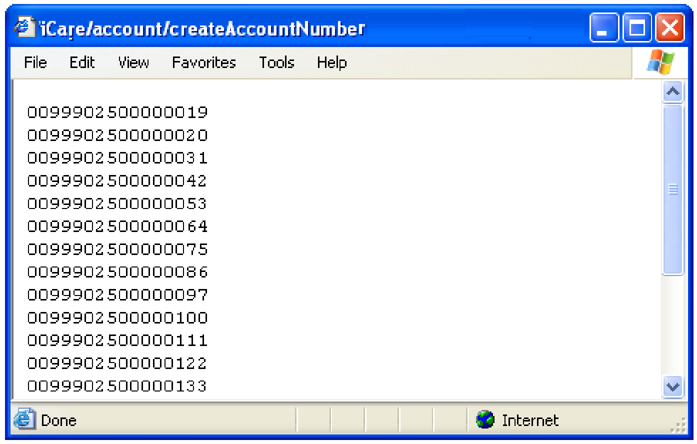
3. Modify according to the table below:

Field	Description
Program	Name of the program associated with these cards
Card Rule	Card Rules that applies to these cards
Pre-Set Denomination	Enter a pre-set denomination in this field, if any exists
First Account Number	Enter the first account number in the series for the cards. This number must conform to the card number specifications of the program
Number of Accounts	Total number of accounts created. This issues consecutive card numbers starting with the account number defined the First Account number field

Note *A standard iCard card number is 16-digits: a 15-digit account number followed by a check digit.*

However, since iCare supports non-iCard cards, card number lengths may vary.

4. Click the Create button from the top menu bar; a text file will open with all your newly created numbers:



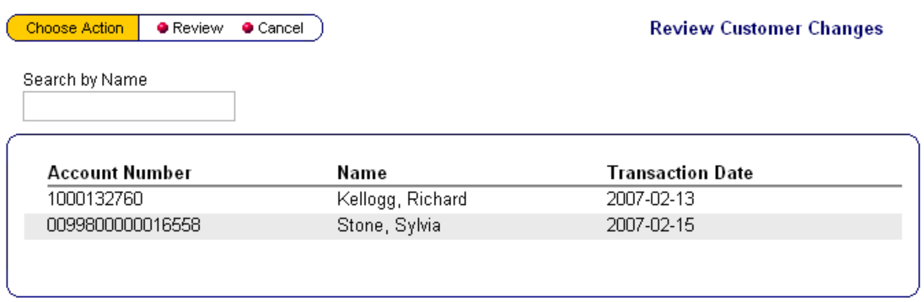
Note	*Save this list to a file, and transmit the file to your card vendor for production of the actual physical cards.* *These cards will still need to be activated once they have been produced*

Review Customer Changes

Reviewing customer allow you to review certain customer changes before they become permanent in the database. Anytime any changes to the first or last name associated with the customer account the record is flagged and will appear in the Review Customer Changes page. Before the changes made by the customer will be transferred to the customer database, they must be approved using this interface.

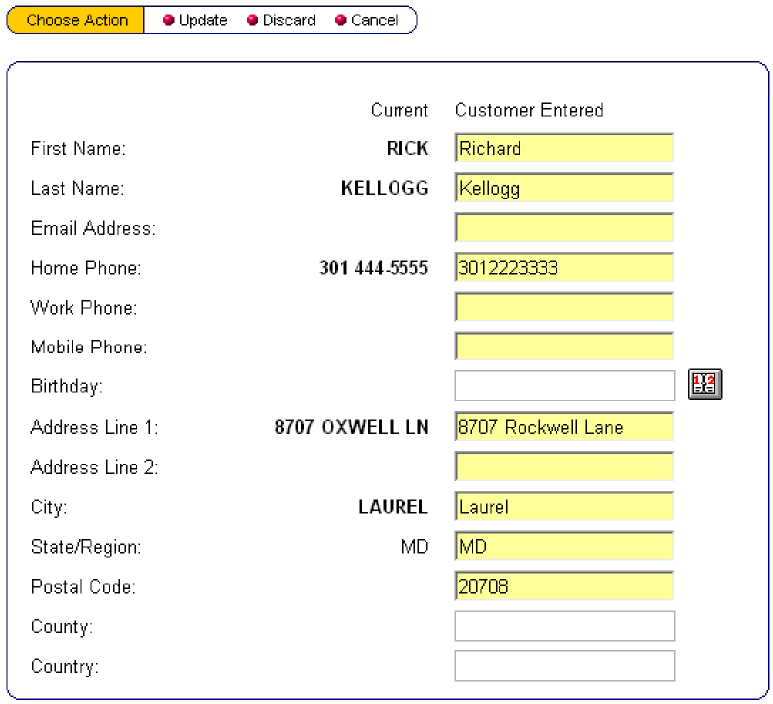
Customers can make changes to their data using the Profiles screen in the myicard.net Profiles page. To review customer made changes:

1. Navigate to iCare Admin | Account Admin | Review Customer Changes



2. Select a customer change and click Review

3. The Review page shows all current information as well as what the customer entered as updated information.



4. You can review and/or make changes to the information the customer has entered through the myicard.net interface
   - To accept the customer's changes, click Update
   - To deny the customer's changes, click Discard

Note	*When updates are discarded, the customer's information returns to the last known state.* *When the customer logs back into myiCard, his/her information will be unchanged.*

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5. When you return to the Review Customer Changes overview page, the record will no longer be in the queue

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Note	*The information that appears in the editable text fields is the information as it will appear in the customer information. For example if an update, has made changes such as removing the second address line, and that field is left blank, when the information syncs with the hosting center, there will be no information in that field.*

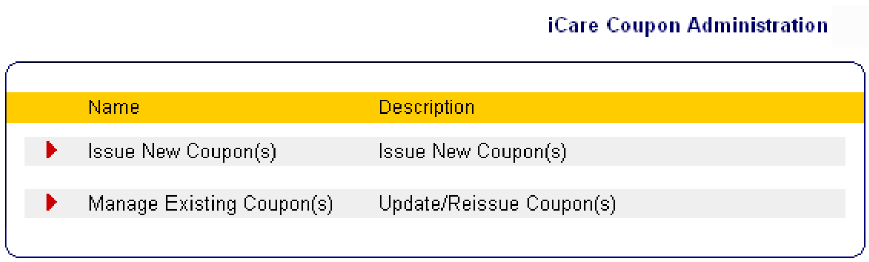
Coupons

Overview

Organizations can created coupon serial numbers using this section of the iCare Application. Once serial numbers are created, they can be assigned to coupons. Coupons are then linked to various loyalty programs.

Issuing and Managing Coupons

Coupons are issued and managed on a per account basis. Coupons can be issued according to various criteria. These coupons are defined as sets of rules that govern a discount. The rules place boundaries on the discounts such as amounts, valid dates, and eligibility. You can also include redemption instructions etc. for each coupon.



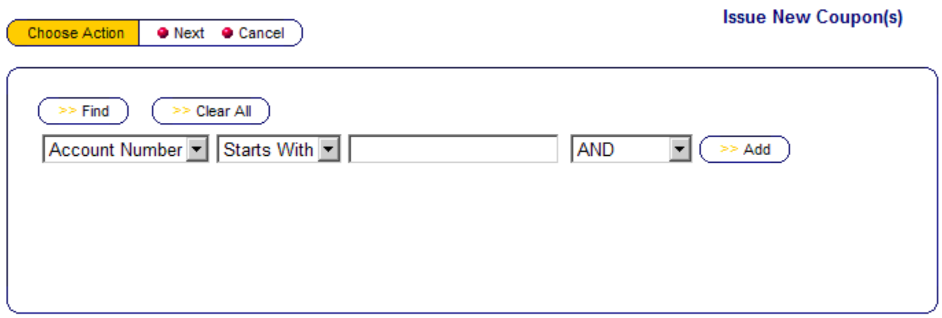
Issuing New Coupon(s)

There are many reasons why an organization might want to issue a new coupon to an existing account holder. Perhaps the account holder had a bad experience and the organization wants to "make it right" by offering them additional savings. Issuing a coupon directly to an account is a quick, easy way of offering incentives for repeat business without having to take out an add in the paper or have hard-copy coupons printed and distributed.

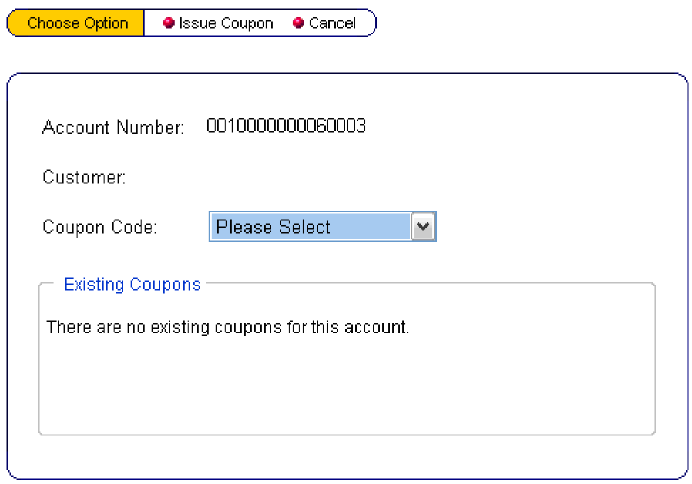
Note	*New coupons may only be issued for coupon types with Ad Hoc issuance capabilities.* *Ad Hoc issuance is defined for coupon types via iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Coupon Types. For more information, please refer to* *Coupon Types.*

To assign a coupon to an account:

1. Navigate to iCare Admin | Coupons | Issue New Coupon(s); The Issue New Coupons main page appears:



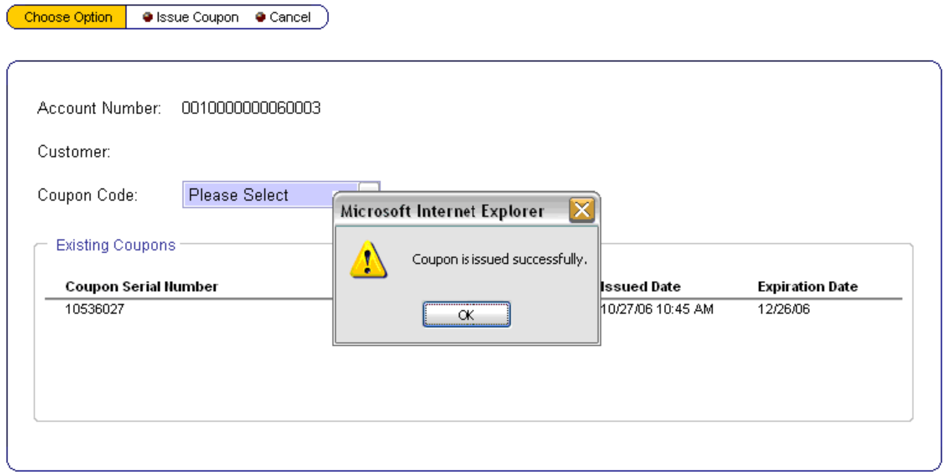
2. Search for and select the account to which you want to issue a coupon and click Next; a page similar to the following will appear:



3. Select a Coupon Code and click Issue Coupon from the top menu bar

Note	*Coupon Codes contain all information (amount, expiration date, etc.) for the coupon. The information is defined by a System Administrator in the GPL Configuration module.*

4. Click OK from the confirmation dialog box:



The coupon with the code you have chosen has been issued to the account.

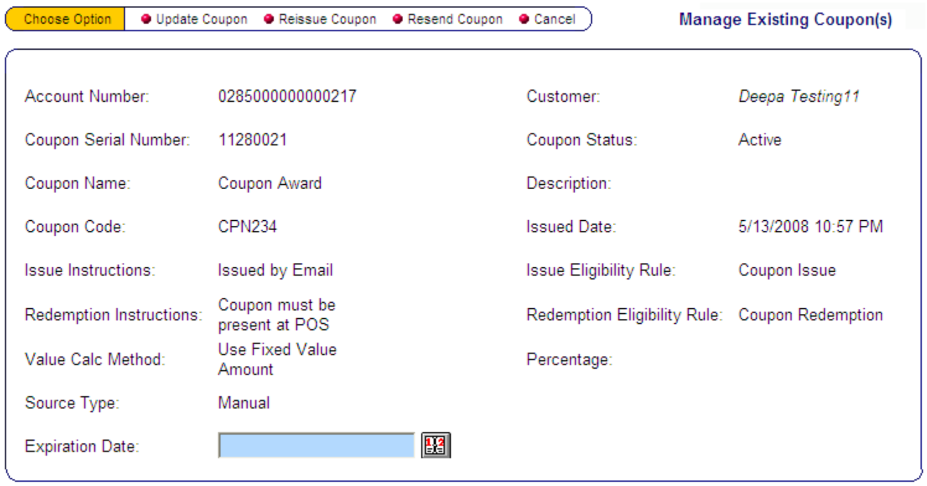
Managing Existing Coupons

Organizations can create coupons for any type of promotion. As such, sometime it is necessary to apply expiration dates to coupons. For example, a location offers coupons to account holders for free ice cream sundaes June 15 - August 15 one year. The following year, the location considers all the increased business that coupon generated and decides to run the same promotion. Rather than creating a brand new coupon, the organization can access the old coupons and merely “update” the expiration date.

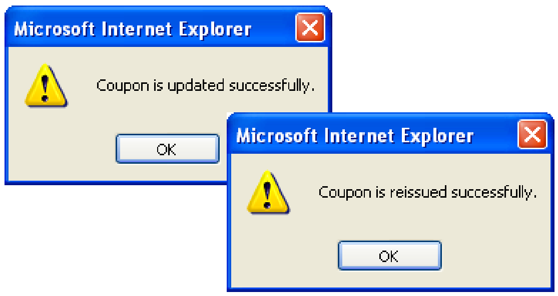
To update and reissue a coupon:

1. Navigate to iCare Admin | Coupons | Manage Existing Coupon(s); The Manage Existing Coupons main page appears:

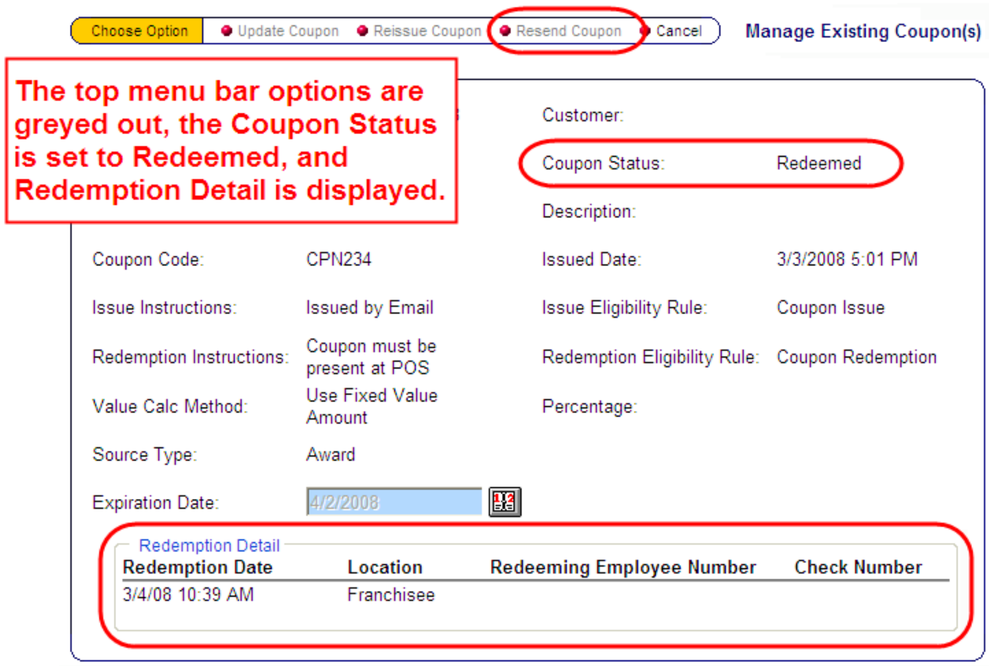
2. Search for and select the account you want to issue coupons for and click Next; a page similar to the following will appear:



3. Make corrections to the expiration date and click Update Coupon OR to only reissue the coupon, click Reissue Coupon
4. One of the following confirmation boxes will appear:

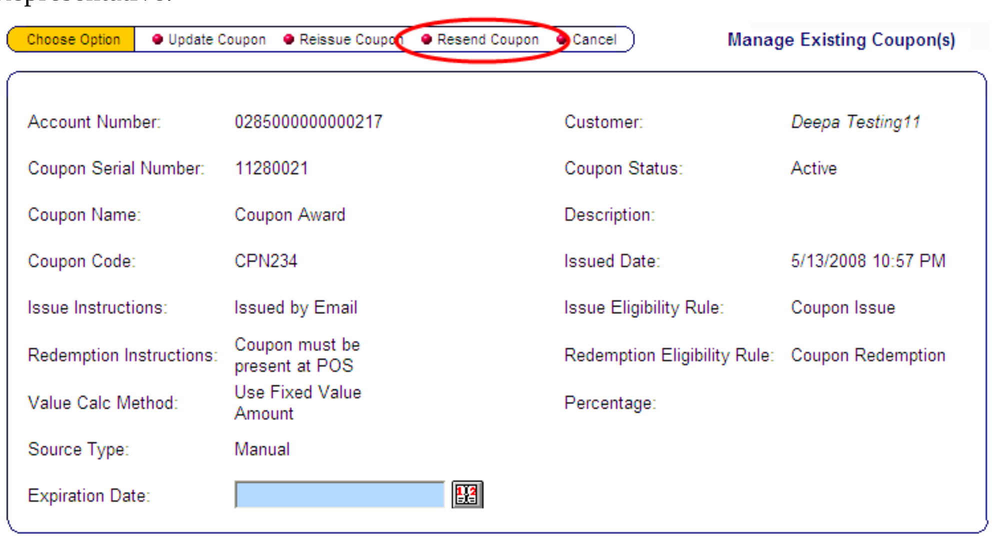


Once a coupon has been redeemed, it may not be reissued, updated, or resent using this module:



Campaigning

Customers of the Campaigning Feature will also be able to resend email coupons. Email coupons are coupons that are embedded within an email. Only customers with the Campaigning Feature will be able to resend email coupons. If you would like to know more about Campaigning, please speak to your MICROS Account Representative.



iCare Gift, Payment, and Loyalty Configuration

Overview

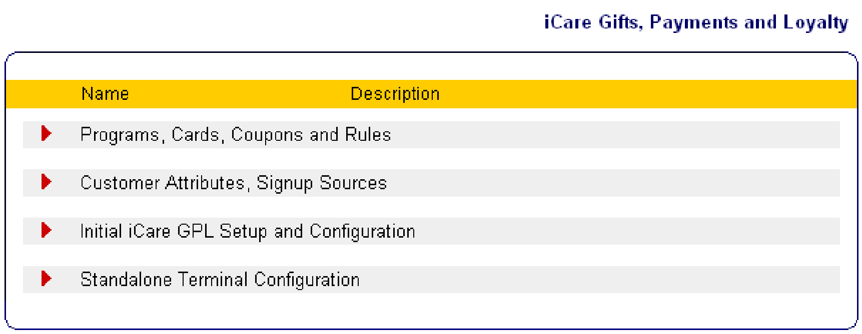
Functions within the GPL Module organized into four sections:

1. Programs, Cards, Coupons and Rules
2. Customer Attributes, Signup Sources
3. Initial iCare GPL Setup and Configuration
4. Standalone Terminals

To access the iCare GPL Configuration section of the myMicros.net user interface:

1. Navigate to iCare Admin | iCare Config

2. Select one of the four options to configure:

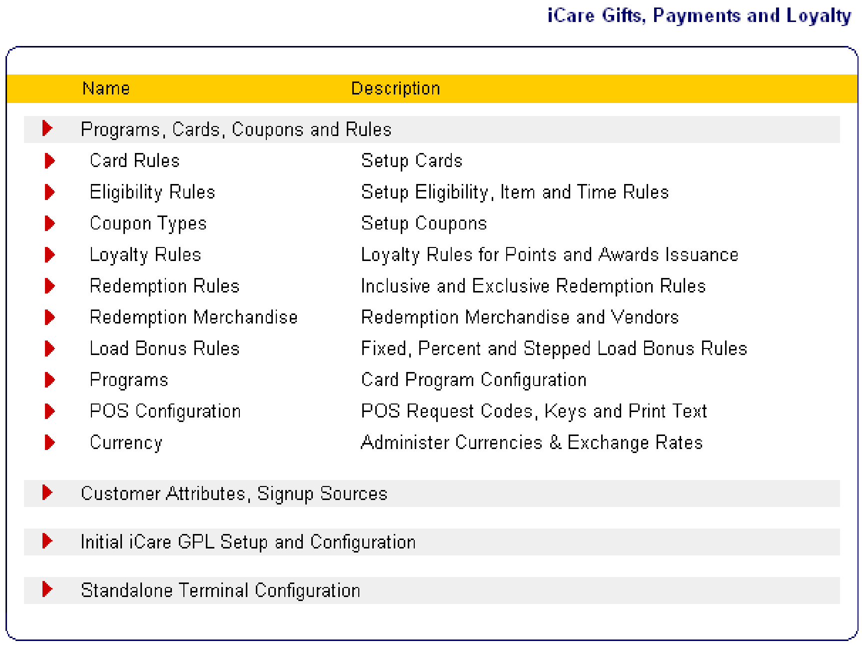


Programs, Cards, Coupons, and Rules

From within the Programs, Cards, Coupons, and Rules module, you can perform the following tasks:

- Create Card Programs
- Set up Card, Eligibility, Loyalty, Redemption, and Load Bonus Rules
- Assign Redemption Merchandise
- Configure the iCare to communicate with the POS

- Administer foreign currencies and exchange rates



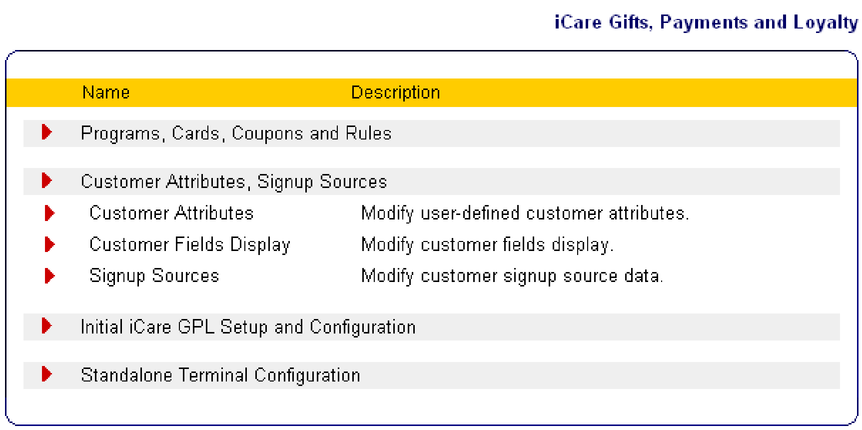
iCare Gifts, Payments and Loyalty

Name	Description
Programs, Cards, Coupons and Rules	
Card Rules	Setup Cards
Eligibility Rules	Setup Eligibility, Item and Time Rules
Coupon Types	Setup Coupons
Loyalty Rules	Loyalty Rules for Points and Awards Issuance
Redemption Rules	Inclusive and Exclusive Redemption Rules
Redemption Merchandise	Redemption Merchandise and Vendors
Load Bonus Rules	Fixed, Percent and Stepped Load Bonus Rules
Programs	Card Program Configuration
POS Configuration	POS Request Codes, Keys and Print Text
Currency	Administer Currencies & Exchange Rates
Customer Attributes, Signup Sources	
Initial iCare GPL Setup and Configuration	
Standalone Terminal Configuration	

Customer Attributes, Signup Sources

From within the Customer Attributes, Signup Sources module, you can perform the following tasks:

- Modify Customer Attributes
- Specify which fields will be visible on the UI
- Determine what type of customer signup data will be required



iCare Gifts, Payments and Loyalty

Name	Description
Programs, Cards, Coupons and Rules	
Customer Attributes, Signup Sources	
Customer Attributes	Modify user-defined customer attributes.
Customer Fields Display	Modify customer fields display.
Signup Sources	Modify customer signup source data.
Initial iCare GPL Setup and Configuration	
Standalone Terminal Configuration	

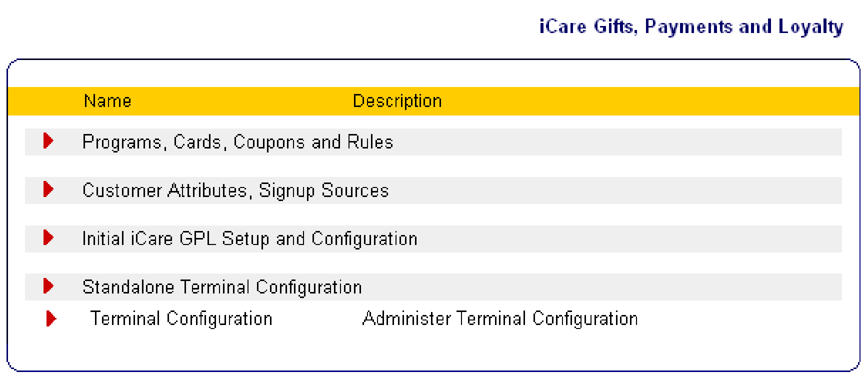
Initial iCare GPL Setup and Configuration

The tasks performed within this module are typically “one-time-only” configurations. Usually they are configured during initial configuration of the site by a member of the Implementation Group. However, as locations are added and updated, accessing this area and synching the new/updated locations is required. Tasks in this area include:

- Synching the organization and locations with databases maintained by MICROS
- Setting up Merchant IDs (rare)
- Creating Customer Note Categories (optional)

Standalone Terminals

MICROS has extended their iCare functionality to non-MICROS POS with their support of standalone terminals. This increased flexibility gives more organizations the ability to incorporate the powerful and comprehensive iCare Customer Relationship Management tool into their businesses.



iCare functionality for standalone terminals is configured on a location-by-location basis. The feature has been designed this way, since many organizations may choose to use of both MICROS POS, as well as other, third-party generic interfaces.

Configuring iCare for standalone terminals is not a 1-step procedure. Both the portal and the standalone terminal must be configured to communicate with each other.

Note	*At this time, MICROS iCare can be configured to work with VeriFone Vx570 Terminals.* *VeriFone™ is a registered trademark of VeriFone.*

Programs, Cards, Coupons, and Rules

Many programs exist in iCare. Those programs are influenced by various Rules. There are generally six different “types” of Rules

1. Card Rules,
2. Eligibility Rules
3. Load Bonus Rules,
4. Coupon Rules,
5. Loyalty Rules, and
6. Redemption Rules.

Note	*The MyMicros Implementation Group generally sets up these Gift, Payment, and Loyalty Programs, as configuration may be somewhat complicated for an inexperienced user*

Card Rules

The Card Rules menu allows you to, create, modify, and configure card rules. These rules can be applied or “linked” to iCare Card Programs, which are then identified as the type of card to be used with the program.

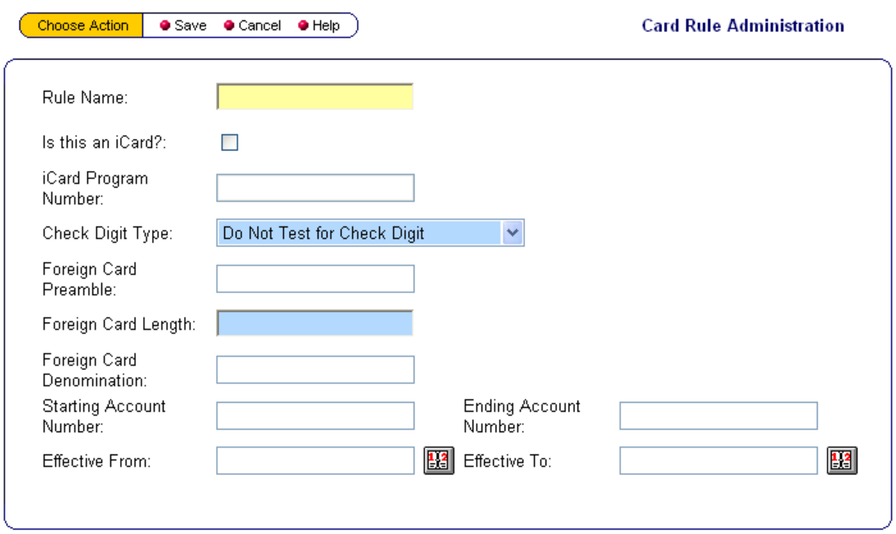
For example, an organization purchases the iCare Gift Card Program through MICROS and has 10,000 cards created. MICROS provides a “preamble” (ex. 1234) to be associated with those types of cards. All 10,000 of those cards possess the 1234 preamble. Anytime that organization swipes a card in its locations, the preamble 1234 must appear; if 1234 is not the preamble, then the system will not recognize the card. This is done to prevent fraud. MICROS is also responsible for generating the first set of card numbers for the organization. These numbers will be generated in text file format and can be provided to a card vendor the organization’s choosing - as long as they are in compliance with our magnetic card specifications.

Card rules allow you to set certain attributes for governing each set of cards used with an iCare Program. Card Rule functionality has been extended to a one-to-many relationship, meaning one Card Rule (or one set of card numbers) may be shared amongst multiple gift and loyalty programs.

Note *Using Card Rules in this fashion, can pose some difficulties during implementation. Please speak to a MICROS Account Representative or a mymicros Implementation Team member for information on the capabilities of shared Card Rules.*

SCREEN OVERVIEW

The following describes the fields you will find on the Card Rules screen:



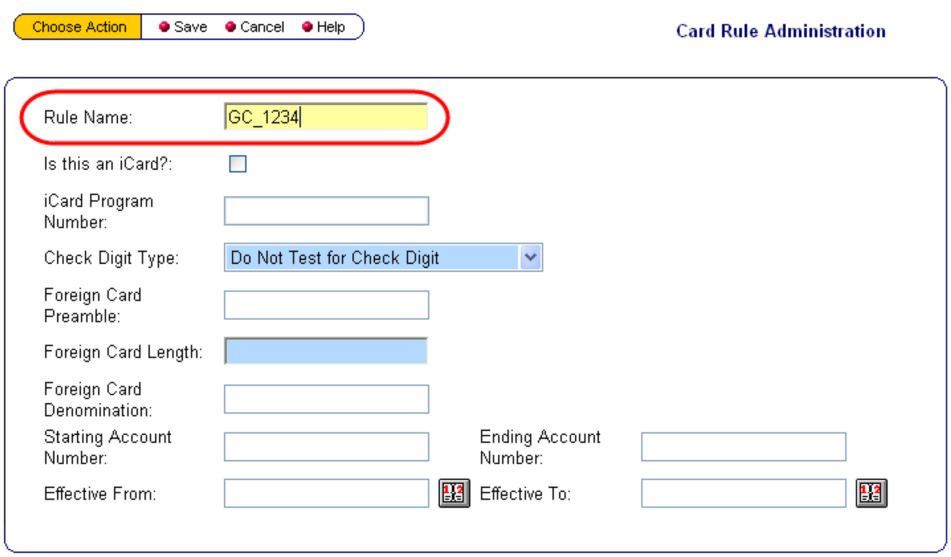
Field	Description
Rule Name	The name for the card rule. Usually a combination of GC (gift card) or LC (loyalty card) and the preamble is used (ex. GC5555).
Is this an iCard	Enable this option bit if the organization is using myMicros iCards
Card Program Number	Enter the program number (a.k.a. preamble; digits 2-5 of a full card number; ex. Card Number = 0**1234**000000000013 / Program Number = **1234**)
Check Digit Type	Enter the type of check digit processing that will be applied (foreign card only)
Foreign Card Preamble	Enter the foreign card preamble (foreign card only)

Field	Description
Foreign Card Length	Enter the numeric length of the foreign (foreign card only)
Foreign Card Denomination	Enter the denomination (fixed currency amount) for the card (if any) (foreign card only)
Starting/Ending Account Number	Enter the beginning and ending account numbers for the cards being used. For iCards, refer to the Card Number Format below. (optional)
Effective From/To Dates	Enter the start and end dates for which this card rule is active (optional)

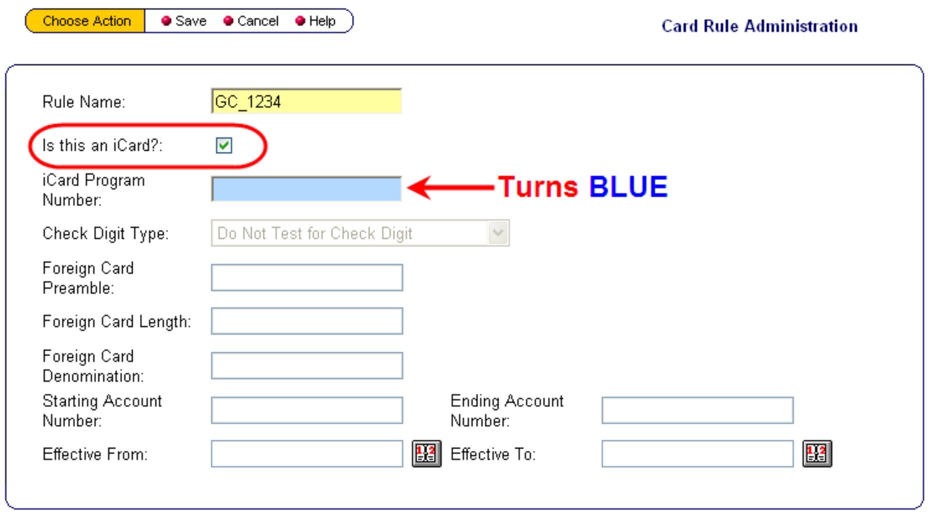
CONFIGURING CARD RULES

Setup an iCard

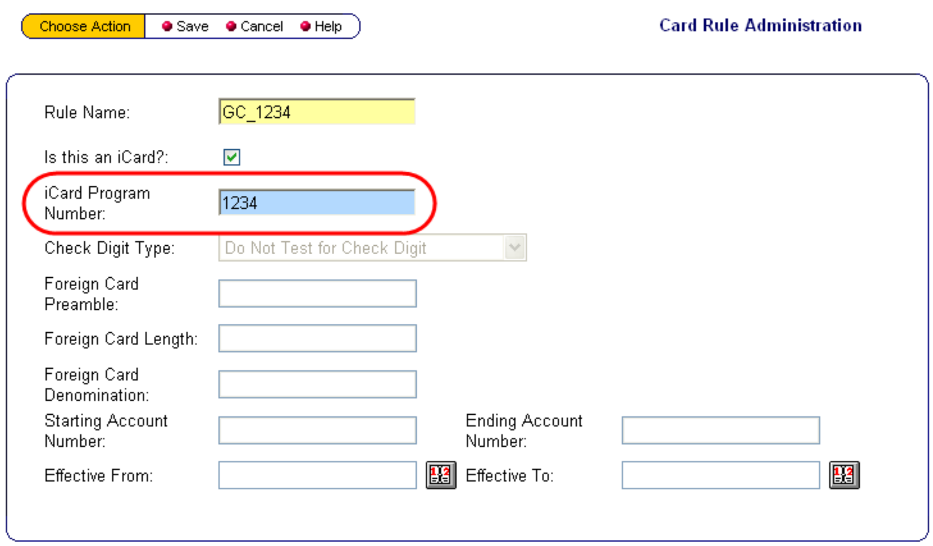
1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Card Rules
2. Click Add
3. Enter the rule name



4. Enable the “Is this an iCard?” check box - the Program Number field will turn blue (meaning **required**)



5. Enter the iCard Program Number:



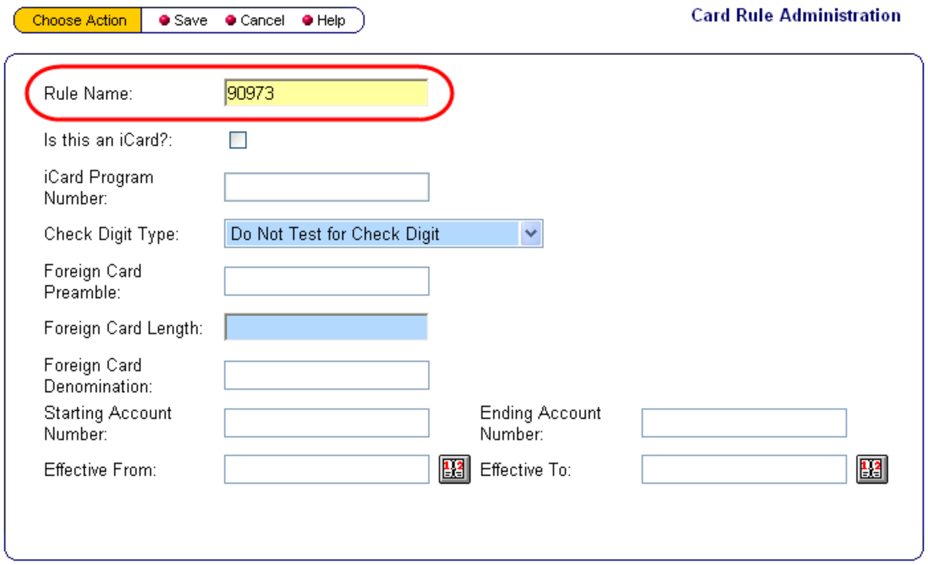
6. Save

Setup a Foreign Card

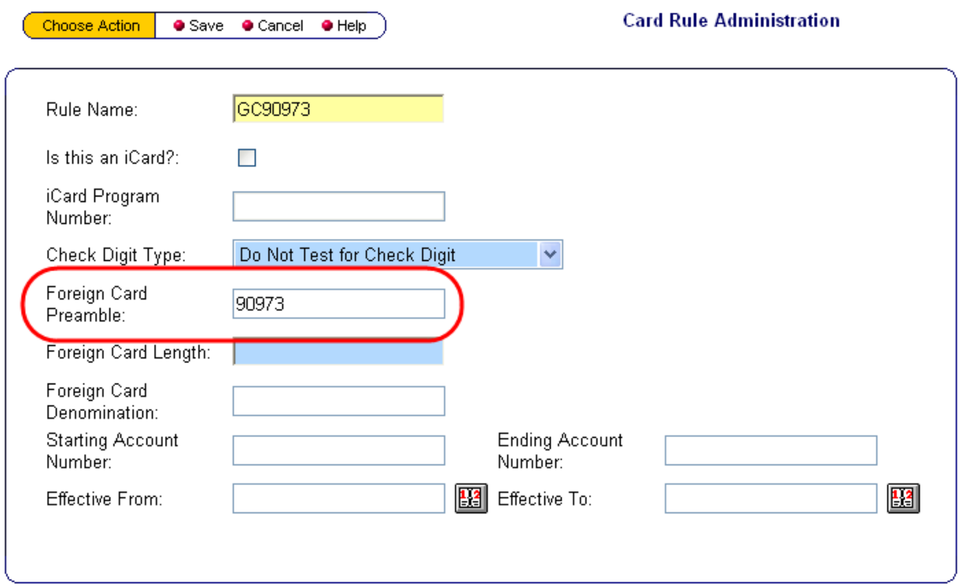
Setting up a Foreign Card begins similarly as setting up an iCard:

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Card Rules
2. Click Add

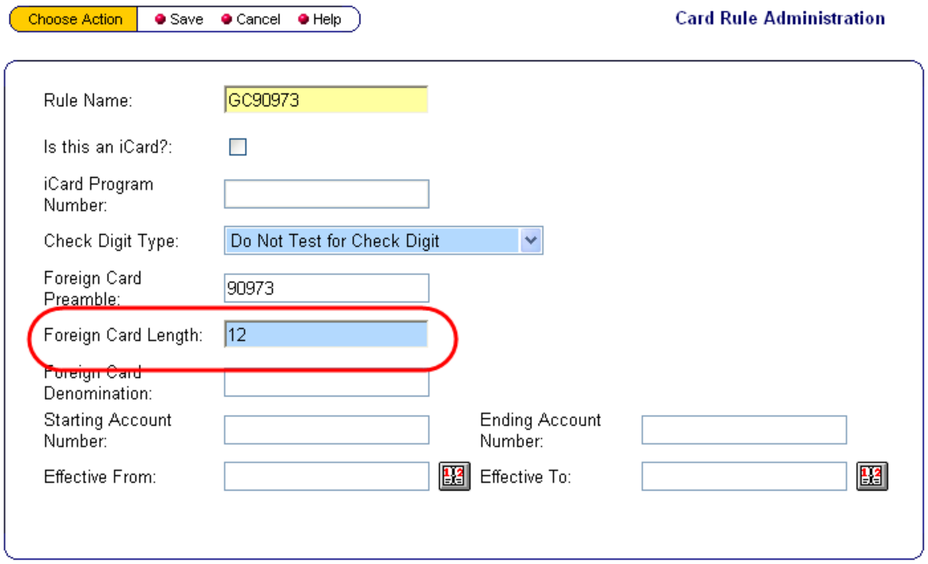
3. Enter the rule name (be specific but try to include the preamble)



4. Enter the Foreign Card Preamble



5. Enter the numeric length of the foreign card (iCards are always 16 digits; foreign cards may vary)



6. Save

iCard Number Formats

iCard numbers use specific formats for all cards:

```
0ppppdddnnnnnnnC
```

Where the values are represented as follows:

Field	Name	Digits	Value	Remarks
0	Lead-In	1	Always Zero	Prevents use as a credit card account number
pppp	Program Number	2-5	0100 - 9999 Provided by MICROS	Determines the stored value or loyalty program
ddd	Pre-Set Denomina - tion	6-8	000 = Open Value 025 = $25	Optional. Setting this causes all cards in the series to be worth the entered value
nnnnnnn	Account Number	9-15	0000001 - 9999999	Allows up to 10 million numbers in a program
C	Check Digit	16	Check digit is derived using the MICROS proprietary algorithm	

Eligibility Rules

This menu allows you to configure Eligibility Rules. Eligibility Rules are sets of rules which govern the behavior of the iCare program. Eligibility Rules are associated with a Point Issue Loyalty Rules or Point Award Loyalty Rules.

An eligibility rule may be created to:

- require a minimum number of items to calculate earning points
- determine specific menu items to calculate earning points
- specify days or hours of the day eligible to earn specified points.

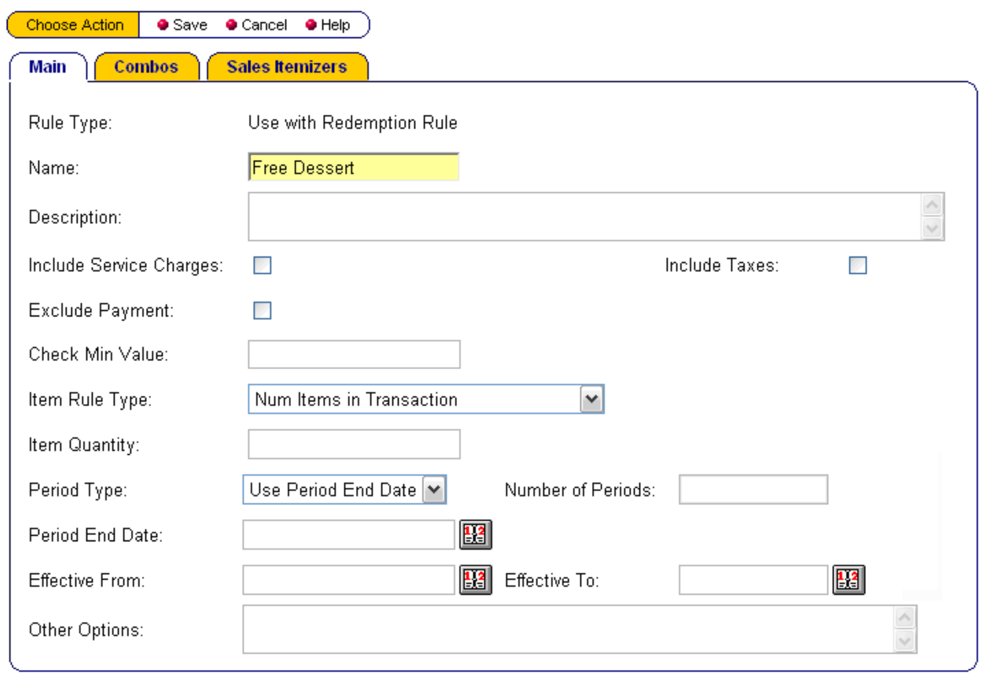
In calculating the guest check total and eligible points, the eligibility rules can be configured to include or exclude the following items from the guest check total:

- service charges
- taxes

SCREEN OVERVIEW

The following describes the available fields that can be modified in the Eligibility Rules section.

Main Tab

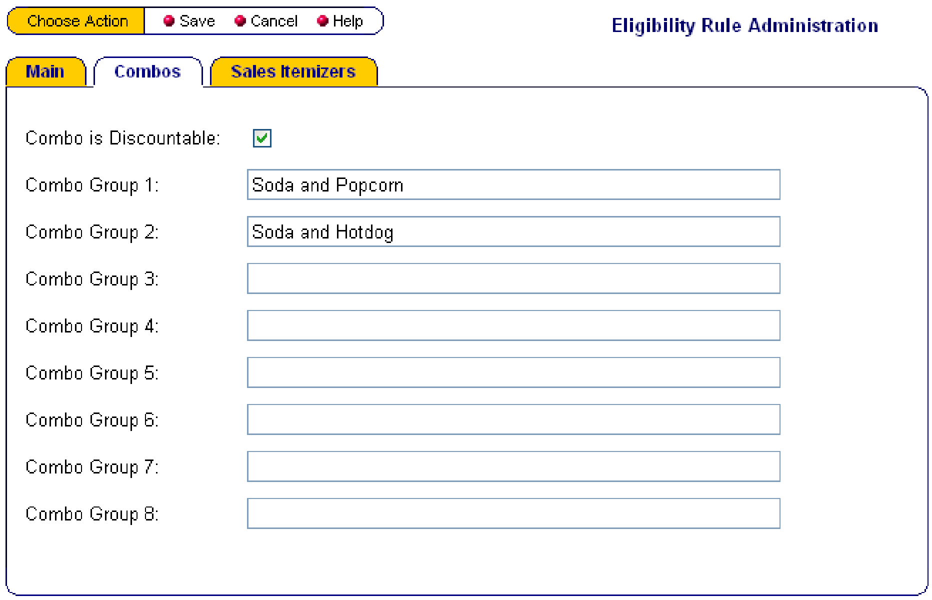


<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Rule Type</td><td>Select with what other rule this eligibility rule will be applied:
◆ Loyalty
◆ Redemption
◆ Coupon
◆ Load Bonus
Once a selection has been made, this field may not be changed</td></tr>
<tr><td>Name</td><td>Name of the Eligibly Rule</td></tr>
<tr><td>Description</td><td>200-character field wherein a description as to what the rule states and what the rule provides may be entered here</td></tr>
<tr><td>Include Service Charges</td><td rowspan="2">Select these boxes if the transaction amount can include Tax and Service Charges when calculating the Check Minimum Value or when calculating points. Clear these boxes if the Check Minimum Value is calculated on the transaction amount net of Tax or Service Charges</td></tr>
<tr><td>Include Taxes</td></tr>
<tr><td>Exclude Payment</td><td>Select this box if partial payments applied to the transaction should be excluded when calculating the Check Minimum Value or when calculating points. This is intended to prevent a situation in which a guest makes a payment to a check using a gift card, and receives loyalty or awards points based on that purchase. (The guest presumably already received points for the purchase or load of the gift card. Awarding points for the use of that card toward a purchase amounts to double-dipping.)</td></tr>
<tr><td>Check Min Value</td><td>If the guest check must reach a minimum transaction amount in order to achieve eligibility, enter that amount.</td></tr>
</table>

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td rowspan="6">Item Rule Type</td><td colspan="2">Select the method of determining eligibility for this rule:</td></tr>
<tr><td>Select this method...</td><td>...to base eligibility on the purchase of...</td></tr>
<tr><td>Num Items in Transaction</td><td>the number of items in the transaction</td></tr>
<tr><td>Num Combos in Transaction</td><td>the number of combo items in the transaction</td></tr>
<tr><td>Num Items in Transaction this Period</td><td>the number of items on the transaction with the period defined in the period fields below</td></tr>
<tr><td>Num Combos in Transaction this Period</td><td>the number of combos on the transaction with the period defined in the period fields below</td></tr>
<tr><td>Item Quantity</td><td colspan="2">Enter the quantity that has to be satisfied in order to achieve eligibility under this rule.
◆ Enter 0 if all items are available to earn points.
◆ Enter 1 if certain items are available to earn points.
If only certain items are available to earn points, then the Eligibility Rule will need to have its item rules and/or time rules edited as necessary.</td></tr>
<tr><td colspan="3">Use the period configuration fields, if eligibility is defined by the number items/combos purchased within a given period (above)</td></tr>
<tr><td>Period Type</td><td colspan="2">Select a period type: use period end date, days, weeks, months, quarters, years.</td></tr>
<tr><td>Number of Periods</td><td colspan="2">Enter the number of periods (ex. if Days is selected above, enter an integer that reflects the number of days the eligibility rule will be effective)</td></tr>
<tr><td>Period End Date</td><td colspan="2">Enter the date when the eligibility rule will expire (ex. rather than having months, days, etc., an eligibility rule could end on Dec. 31)</td></tr>
<tr><td>Effective From/To</td><td colspan="2">Enter the start and end dates for which this is active.</td></tr>
<tr><td>Other Options</td><td colspan="2">Enter an value/code in this field (rarely used)</td></tr>
</table>

Combos Tab

This tab may be used to create combos that are eligible. For example, a ballpark may want to have a promotion wherein account holders get a free soda and hot dog when they visit a concession stand. Rather than have the cashier discount the customer’s check by a hot dog and a soda, she can push one button that searches for the eligible items and discounts them both from the check.



Combos are used in iCare when defining eligibility rules for loyalty programs, coupons, or awards. For example, in order to meet eligibility, the customer must purchase a combo within a transaction, or a number of combos within a period.

Note	*The use of combos also requires the use of the mymicros portal.*

In addition, combos can be used for discounting when used with a coupon type. For example, if a customer orders the right combination of menu items that match a combo, a discount can be issued and applied for some or all of the items in the combo. The combos defined on the POS for sales purposes may not be the same combinations that are needed in iCare to meet eligibility rules or to define discounts.

As far as this page is concerned, only the names of the combos need to be entered, like Lunch Soup & Salad or Bagel & Medium Coffee Special. Also, if eligibility is based on the purchase of these combos (or the items that comprise the combos), then the option Combo is Discountable must be enabled.

Sales Itemizers

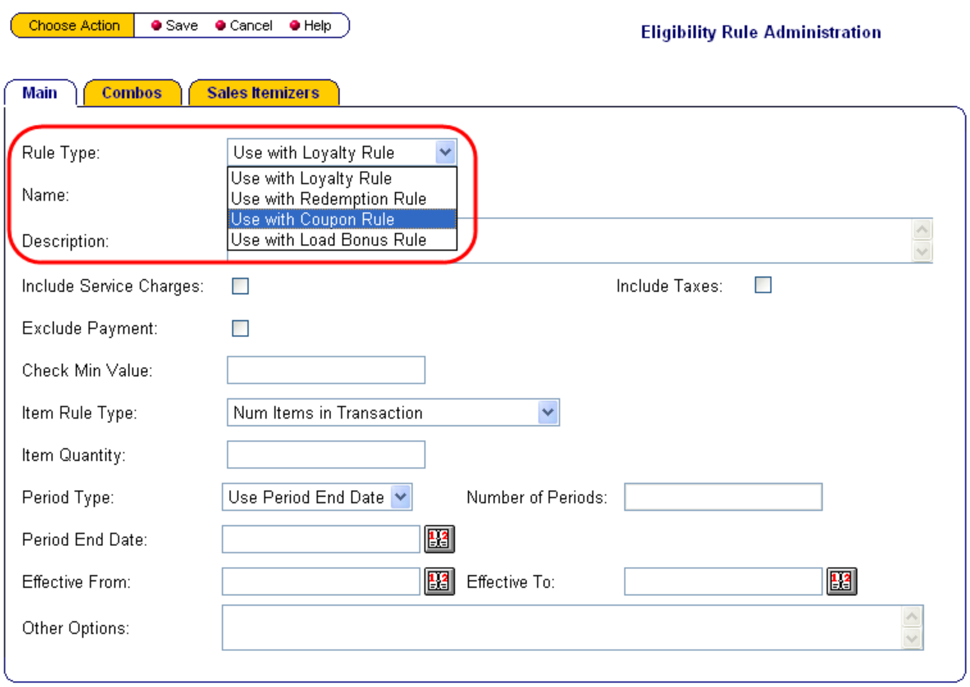
Sales Itemizers are used to separate menu item sales into categories, such as Food, Beverage, and Merchandise. Sales itemizers may print on a guest check as separate subtotals. Itemizers can be thought of as collection points or “buckets” where totals are accumulated for analysis and reports. Up to eight sales itemizers are allowed.

Field	Description
Name of Sales Itemizer	An eligibility rule can use sales itemizers to calculate the value of a transaction. Each sales itemizer that was created in Organization Configuration displays on this tab. Check the check box if this sales itemizer is used to determine eligibility for this eligibility rule.

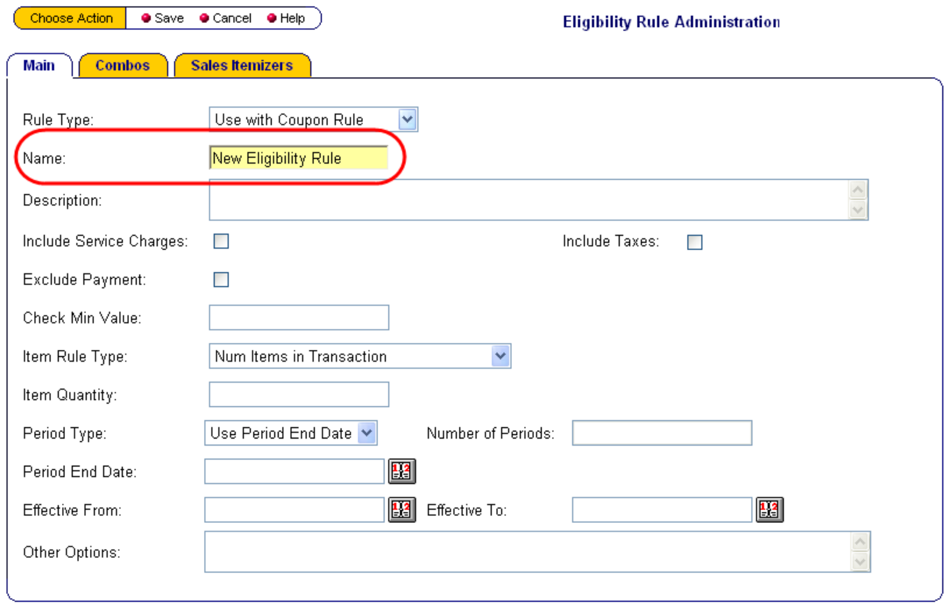
Configuring Eligibility Rules

To set up an Eligibility Rule

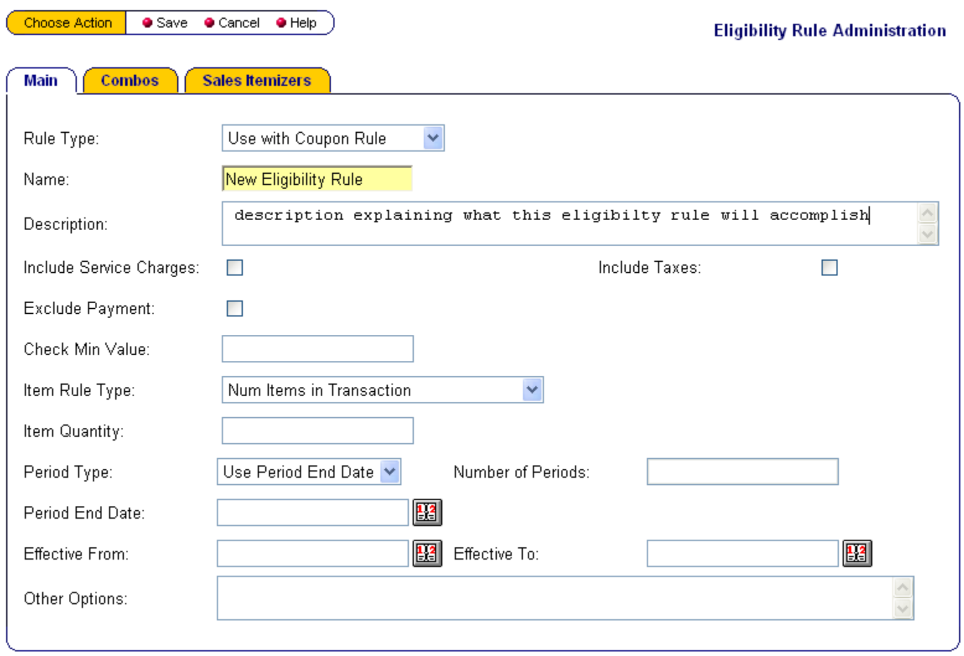
1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Eligibility Rules
2. Click Add
3. Select a Rule Type from the drop-down list:



4. Enter the name of the eligibility rule

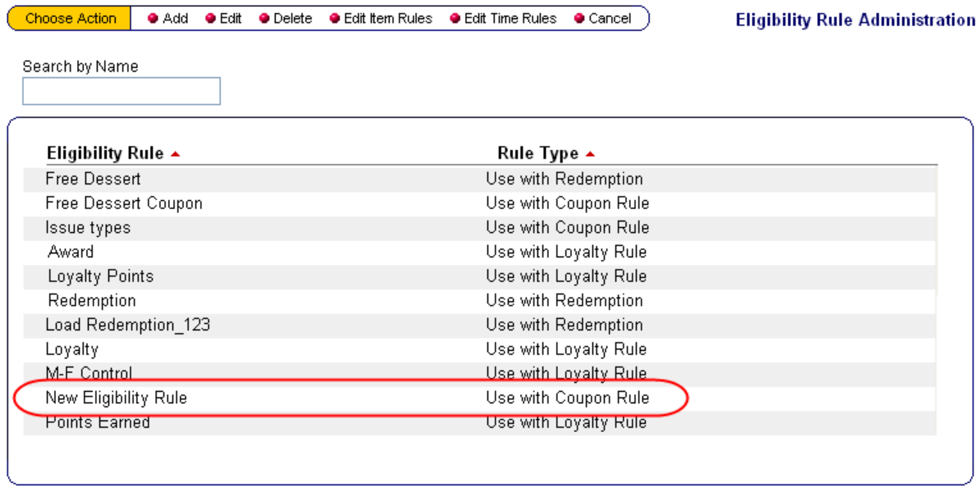


5. Enter a description



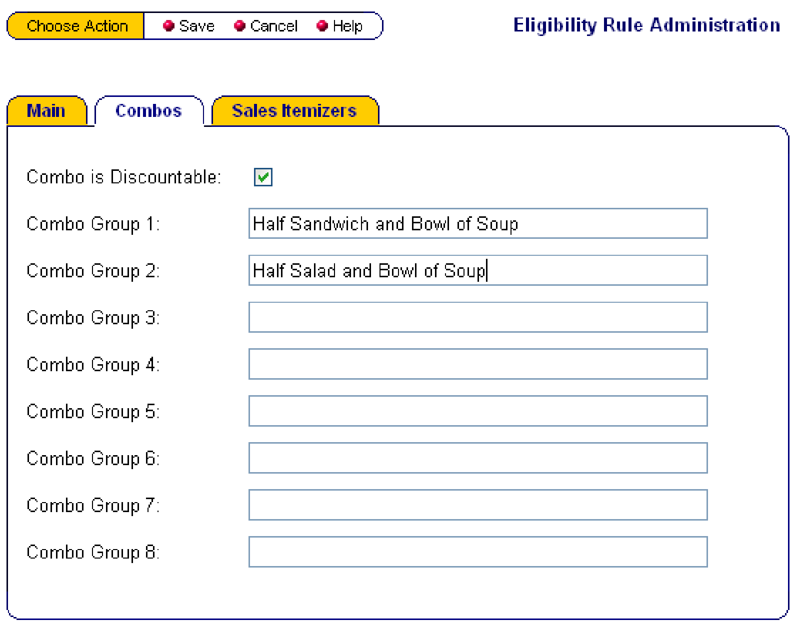
6. Save

All other fields are optional. Your newly created eligibility rule will now appear in the queue:



Creating Combos (optional)

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules
2. Click Add or highlight an existing eligibility rule and click Edit
3. Modify fields on the Main Tab as necessary
4. On the Combos Tab, enter the names of the combos and enable the Combo is Discountable option



5. Save

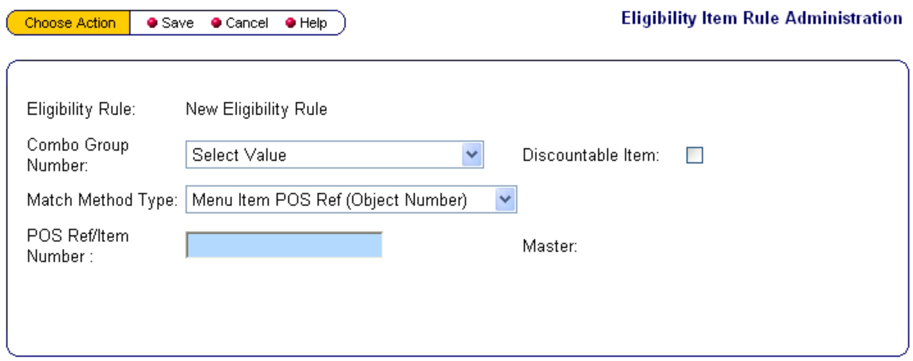
Edit Item Rules

Items Rules can be applied toward an Eligibility Rule to restrict the types of menu items that are available for discount or redemption. For example, a customer participating in a Dessert Award Program may have accumulated enough points to redeem a $10 discount **only on desserts** on the next visit The Item Rule will need to reflect the eligible dessert items that can be discounted, thus keeping the $10 from being applied toward an entree or bar drinks.

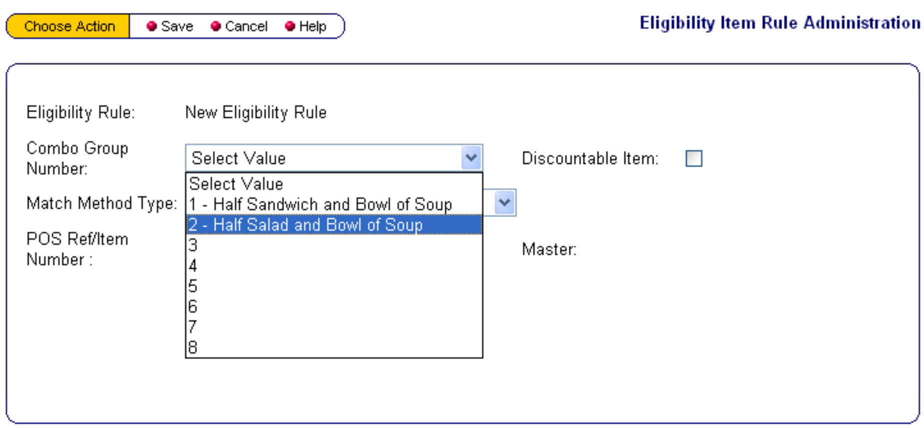
Note	***By default, if no item rules are established, every possible menu item will be eligible for discount.*** *When item rules are created, the items specified menu will be eligible for discount.*

Add an Item Rule to an Eligibility Rule:

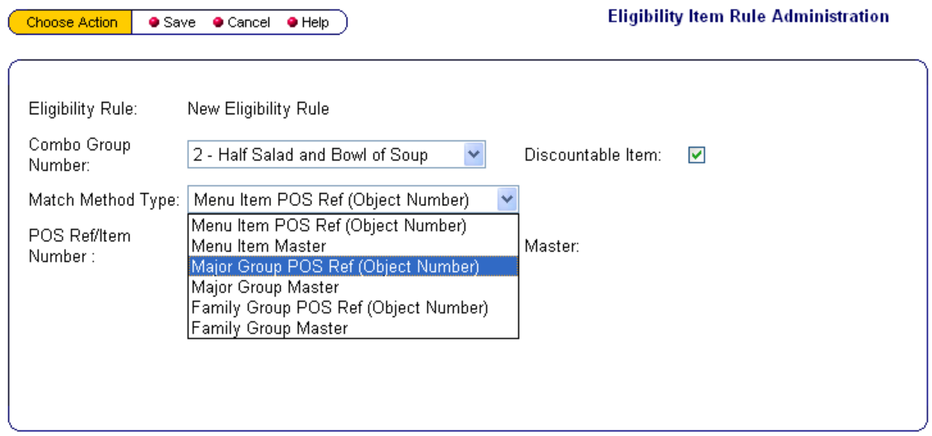
1. If you have not already, create an Eligibility Rule.
2. Select the Eligibility Rule and click Edit Item Rule
3. Select Add to create a new Item Rule; the following page will appear:



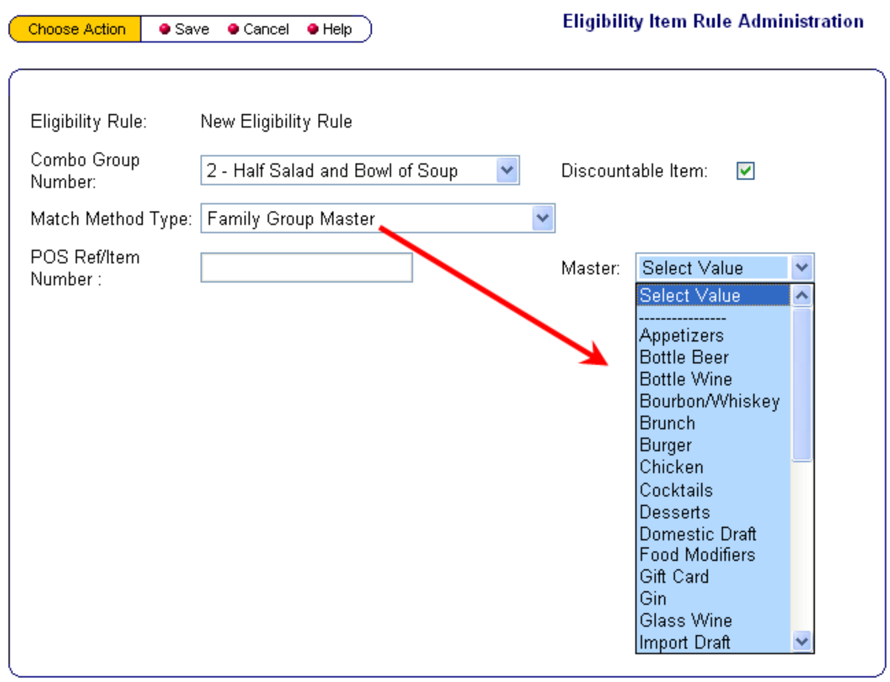
4. Select the appropriate placement for Combo Group Number (if applicable)



5. Enable Discountable Item
6. Select the appropriate Match Method Type (i.e., what "category" of menu items will be included)



- POS Ref (Object Number) types require the numbers for those Family/ Major/Items that will be included in the Item Rule
- Master types require the selection of a Family/Major/Item Master (a drop-down list will become available next to the Master field:



7. Save

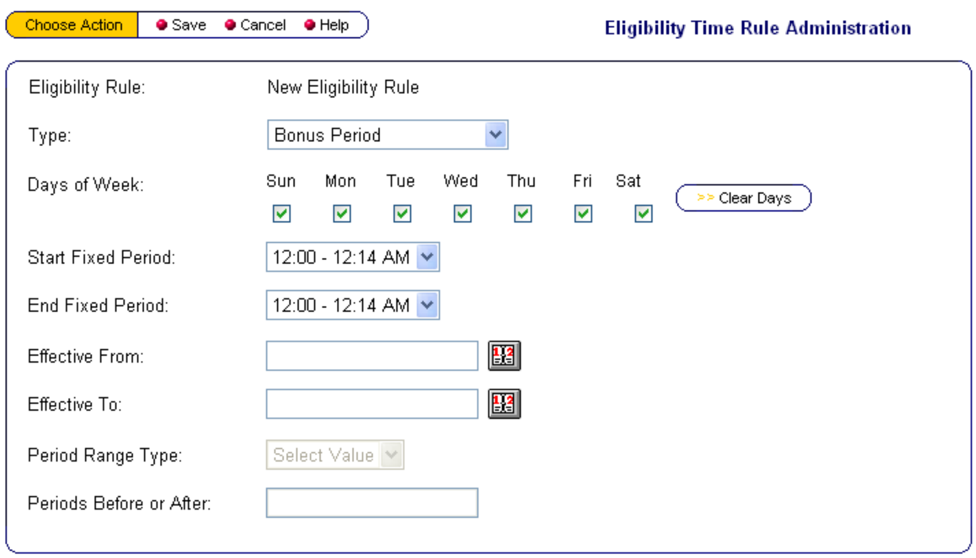
Note	*At this time, iCare Configuration requires users to **enter the items that will be included**, as opposed to items that will be excluded, from the award/coupon/discount, etc.* *If you have only 1 item/family/major POS Ref/Group that is excluded, you will have to enter all the other item/family/ major group information.*

Edit Time Rules

Time Rules dictate when an award can be redeemed or points can be calculated. Organizations can configure their Card Programs to be only eligible activity at certain times, such as only Monday - Friday or only for Sunday Brunch from 10:00 AM until 3:00 PM.

Note	***By default, if no time rules are established, the eligibility rule will be in effect all the time.*** *When time rules are created, the menu items will only be eligible for discount during those specified times.*

Also, Time Rules can determine if customers are eligible for awards on specific dates, such as their birthday or membership anniversary.



Field	Description
Type	Select the type of period for which this Time Rule is being created. Depending on the Type configuration, some of the time constraints listed below may or may not always be available. Types are hard coded into the system. If you need a type that is not available, please contact your MICROS Account Representative.
Days of Week	Select the days of the week this time rule will be effective (ex. Friday & Saturday Evenings)
Start/End Fixed Period	If this rule applies to specific day parts, enter those here (ex. Happy Hour 1/2 Appetizers)
Effective From/To	The start and end dates for the time rule (ex. Valentine’s Discounts from February 10 - February 17)
Period Range Type Periods Before or After	If this time rule was created for an anniversary, you may create a period before and after the actual anniversary date itself in which this rule is in effect. For example, when creating a birthday promotion, you may want the promotion to be valid only if used the week before and after the guest’s birthday. Select the type of period (days, weeks months), and enter the number of periods before and after

Add a Time Rule to an Eligibility Rule:

1. Navigate to iCare Configuration | Programs, Cards, Coupons, and Rules | Eligibility Rules
2. If you have not already, create an Eligibility Rule
3. Select the Eligibility Rule and click Edit Time Rule
4. Select Add
5. Determine the Type of Time Rule that will apply from the drop-down list
6. Define the time parameters using the Days of Week, Start and End Fixed Period, Effective From/To dates, Period Range Types, and/or Period Before or After
7. Save

For the eligibility rules to be effective, they will be linked to the appropriate Loyalty Rules, Card Programs, etc.

Coupon Types

You can create different coupons to be issued to customers by restaurant iCare account administrators. Coupons can be issued according to various criteria. These coupons are defined as sets of rules that govern a discount of some sort. The rules place boundaries on the discounts such as amounts, valid dates, and eligibility. You can also include redemption instructions etc. for each coupon. Once the Coupons have been created, the (restaurant) iCare account administrator can assign these coupons to various accounts. Use the Coupon Types menu to configure these coupons.

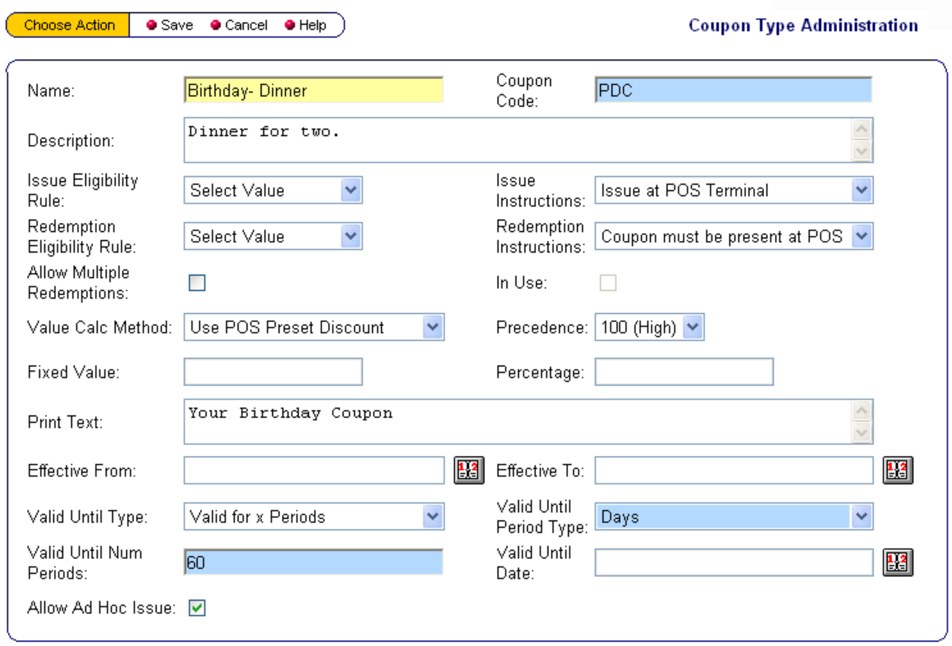
CONFIGURING COUPON TYPES

Setup a Coupon Type

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, Rules | Coupon Types
2. Click Add (or select an existing coupon and click Edit)

Note	*You can search for a specific existing coupon type by using the search box if the list of coupon types is extensive*

3. Modify the fields according to the field description table listed below:



Field	Description
Name	The name of the coupon (required field)
Coupon Code	The coupon code - loyalty rules for coupons search for this code (required field)

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td>Description</td><td colspan="2">200-character field for describing the purpose of the coupon</td></tr>
<tr><td>Issue Eligibility Rule</td><td colspan="2">If you have created Eligibility Rules for coupons, you may select one from the list.</td></tr>
<tr><td rowspan="4">Issue Instructions</td><td colspan="2">Specify the issue instructions for this coupon</td></tr>
<tr><td>Select...</td><td>...if...</td></tr>
<tr><td>Issue at POS Terminal</td><td>the coupon should be issued at the point of sale. (ex. the POS roll printer prints the coupon if criteria are met)</td></tr>
<tr><td>Not Issued at POS Terminal</td><td>coupons that are distributed in some other manner (ex. coupons that are mailed/ emailed to customers)</td></tr>
<tr><td>Redemption Eligibility Rule</td><td colspan="2">If you have created Redemption Rules for coupons, you may select one from the list</td></tr>
<tr><td rowspan="4">Redemption Instructions</td><td colspan="2">Specify redemption instructions for this coupon</td></tr>
<tr><td>Select...</td><td>...if...</td></tr>
<tr><td>Coupon must be present at POS</td><td>the guest must physically present that paper coupon</td></tr>
<tr><td>Automatically redeem coupon during Transaction</td><td>the system should simply apply any coupons accrued by this guest’s account during the POS transaction</td></tr>
<tr><td>Allow Multiple Redemptions</td><td colspan="2">Select this check box if the guest can use the coupon repeatedly. Clear this check box if the coupon can be used only once.</td></tr>
<tr><td>In Use</td><td colspan="2">After a coupon of this type has been used (redeemed) for the first time, this check box is automatically checked by the iCare application. If it is checked, then the coupon type can no longer be edited or reconfigured</td></tr>
<tr><td>Precedence</td><td colspan="2">Specify the “ranking” by which this coupon will be effective. The higher the precedence, the more it will outrank other coupons, rules, etc.</td></tr>
<tr><td>Fixed Value</td><td colspan="2">Specify in this field if the coupon will be assigned a fixed value, such as $2.99 or $10 off</td></tr>
</table>

Field	Description	
Percentage	Specify the percentage of the coupon discount, for example 15% off dinner	
Print Text	Enter text to print on the POS roll printer.	
Allow Ad Hoc Issue	Enable this option for all coupons - this allows coupons to be issued.	
Value Calc Method	Specify the method of calculating the value for this coupon	
	Select...	*...to...*
	Use POS Preset Discount	use a discount from the POS database
	Use Fixed Value Amount	discount a fixed dollar amount
	Use Percentage of Check Subtotal	discount a percentage of the check subtotal (i.e., taxes not included)
	Use Price of Check Subtotal	discount a monetary amount of the check subtotal (i.e., taxes not included)
	Use Percentage Up to Limit	discount a percentage of the entire bill up to a pre-determined limit
	Use Price of Cheapest Item	discount the entire amount of the cheapest eligible item
	Use Percentage of Cheapest Item	discount a percentage of the cheapest item
	Use Price of Cheapest Item not to Exceed	discount the cheapest item that does not exceed a specified value
	Use Percentage of Cheapest Item not to exceed	discount a percentage of the cheapest eligible item that does not exceed a specified value
	Use Price of Most Expensive	discount the entire value of the most expensive eligible item
	Use Percentage of Most Expensive	discount a percentage of the most expensive eligible item

Field	Description	
Value Calc Method (cont'd)	Use Price of Most Expensive not to Exceed	discount the entire value of the most expensive eligible item that does not exceed a specified value
	Use Percentage of Most Expensive not to Exceed	discount a percentage of the most expensive eligible item that does not exceed a specified value
Effective From/ To Dates	Enter the start and end dates during which this coupon type will be issued.	
Valid Until Type	Use this field to define when this coupon type expires.	
	Select...	*...for a coupon type that...*
	Always Valid	never expires
	Valid for x periods	runs for a fixed number of periods
	Valid until period end	runs until the end of a specific period
	Valid until date	expires on a specific date
Valid Until Period Type	If the Valid Until Type is defined by periods, select the type of period: days, weeks, etc. (Required)	
Valid Until Num Periods	If the Valid Until Type is valid for a specific number of periods, enter that number. (Required)	
Valid Until Date	If the Valid Until Type is set to expire the coupon on a specific date, enter that date.	

Note — *In the US, individual state legislation may impose different expiration rules for coupons when they are used in conjunction with gift and debit programs. Please refer to* ***Legislation: Dormant Charges and Expiration Dates*** *for more information*

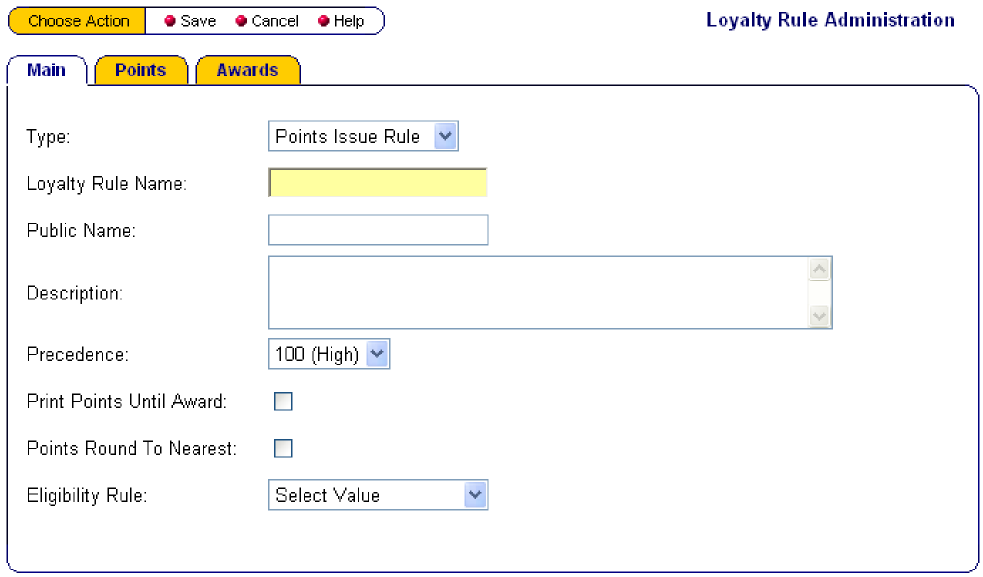
4. Once you have completed all of the fields that define the coupon, click Save from the top menu bar.

Loyalty Rules

Loyalty Rules govern and determine the rules that define customer loyalty and return visits etc. as it pertains to the issuance of the card. This menu allows you to configure rules for issuing points and/or awards as part of one or more loyalty programs.

Screen Overview

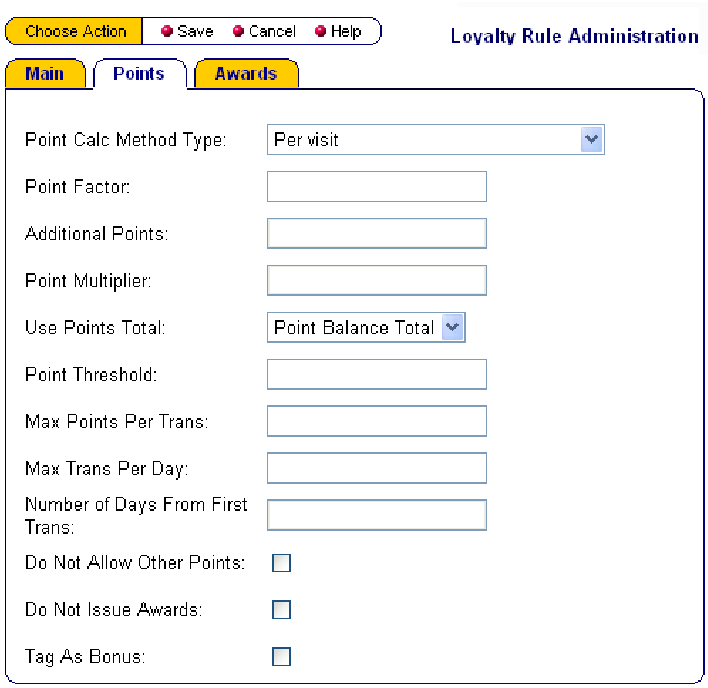
Main Tab



Field	Description
Type	Select whether this rule defines issuing points or awards - this field determines whether the Points Tab or Awards Tab is active
Loyalty Rule Name	Enter a name for this rule that will be visible in the configuration forms.
Public Name	Enter a name for this rule that will display in the customer transaction record, and will be visible to a guest who logs into the myiCard site.
Description	This 200-character field can be used to enter comments, details, or notes for administrators who maintain this loyalty rule.
Precedence	Depending on the number of records you create, the guest may encounter a situation in which there are multiple, conflicting usage rules. To manage this possibility, assign an order of precedence to each record you create. A precedence of 100 is the highest rank.
Print Points Until Award	Depending on the number of records you create, the guest may encounter a situation in which there are multiple, conflicting usage rules. To manage this possibility, assign an order of precedence to each record you create. A precedence of 100 is the highest rank.

<table>
<tr><th>Field</th><th colspan="4">Description</th></tr>
<tr><td rowspan="5">Points Round to the Nearest</td><td colspan="4">Depending on the number of records you create, the guest may encounter a situation in which there are multiple, conflicting usage rules. To manage this possibility, assign an order of precedence to each record you create. A precedence of 100 is the highest rank.</td></tr>
<tr><td colspan="2">If this option is selected,</td><td colspan="2">If this option is cleared,</td></tr>
<tr><td>this amount...</td><td>is displayed as...</td><td>this amount...</td><td>is displayed as...</td></tr>
<tr><td>12.34</td><td>12</td><td>12.34</td><td>12</td></tr>
<tr><td>12.57</td><td>13</td><td>12.57</td><td>12</td></tr>
<tr><td>Eligibility Rule</td><td colspan="4">If you have created Eligibility Rules for loyalty programs, you may select one from the list.</td></tr>
</table>

Points Tab



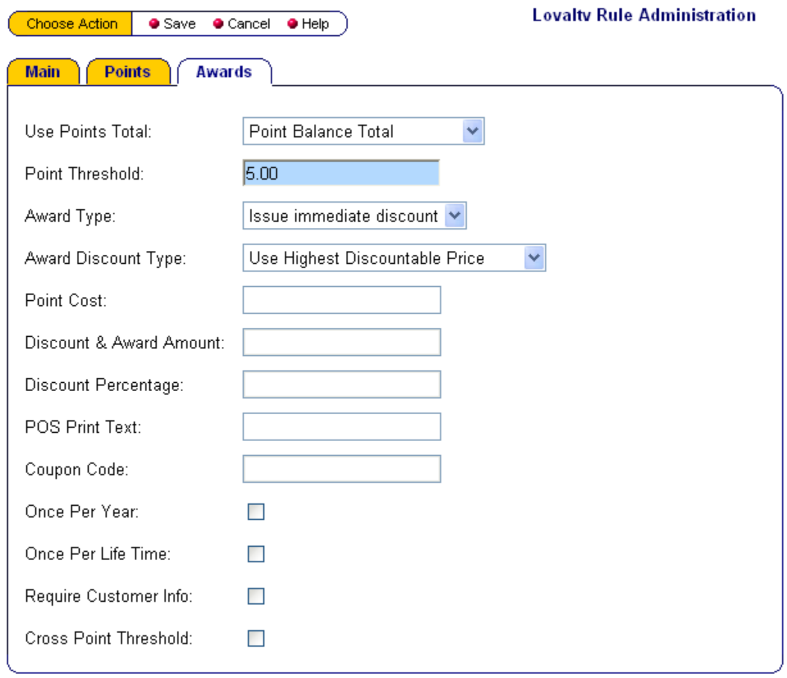
The fields on this tab are only active if Points Issue Rule is selected on the Main Tab.

Field	Description	
Point Calc	Select the method by which a guest will be issued points in this program	
	Select...	*to issue points based on...*
	Per visit	a guest visits to the store
	Per check value	the value of the guest check
	Number of selected items	the number of selected items purchased
	Value of selected items	the value of selected items purchased
	Number of unique selected items	the number of unique selected items purchased (i.e., if the guest purchases 3 of the same item, it will count as 1)

Field	Description	
Point Calc (cont'd)	If any selected item on check	purchasing any one group of selected items
	New items this period	purchase of items for the first time in the period defined
	Additional points if selected	the additional points defined below - Additional Points field will be required
	Use Multiplier if any selected	the point multiplier entered below - Point Multiplier field will be required
	Time Rule Only	
	Additional Points by Visit	the additional points allowed by a visit - Additional Points field will be required
	Use Multiplier if Threshold Exceeded	the excess of a threshold - Point Multiplier field will be require
Point Factor	Enter the number of points to be issued per Point Calc Method Type specified above	
Additional Points	Enter any additional points to be issued (ex. a guest is issued 10 pts. per dessert, plus 5 additional points; if the guest orders 2 desserts, he will receive a total of 25 points)	
Point Multiplier	If Use Multiplier is selected as Point Calc Method Type, enter a value by which the total number of points will be multiplied	

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td rowspan="6">Use Points Total</td><td colspan="2">Select the method of calculating the points total for the loyalty program</td></tr>
<tr><td>The...</td><td>uses the...</td></tr>
<tr><td>Point Balance Total</td><td>current point total for the account</td></tr>
<tr><td>Lifetime</td><td>total number of points accrued since account creation</td></tr>
<tr><td>Year to Date</td><td>total number of points accrued in the current calendar year</td></tr>
<tr><td>Month to Date</td><td>total number of points accrued in the current month</td></tr>
<tr><td>Max Points Per Trans
Max Trans Per Day</td><td colspan="2">If there is a limit to the maximum number of points that can be issued in a transaction and/or day, enter it here</td></tr>
<tr><td>Number of days from First Transaction</td><td colspan="2">Enter the number of days from the first transaction before customers will be able to use any points earned for award redemption</td></tr>
<tr><td>Do Not Allow Other Points</td><td colspan="2">Select this option to prevent points from being issued by another loyalty rule when points are issued by this one (e.g. not valid with any other offer)</td></tr>
<tr><td>Do Not Issue Awards</td><td colspan="2">Enabling this option will cause awards to never be issued.</td></tr>
<tr><td>Tag As Bonus</td><td colspan="2">Select this option if points issued in a program that is linked to this loyalty rule are tagged (flagged) as bonus points. This may be used by the organization to communicate to the guest (e.g. “you earned 20 points including 5 bonus points”)</td></tr>
</table>

Award Tab



Field	Description	
Use Points Total	Specifies which total will be redeemed to receive the award.	
	Select...	*to redeem...*
	Point Balance Total	the entire balance
	Lifetime	the entire lifetime balance
	Year to Date	all points earned in the current year
	Month to Date	all points earned in the current month
	New Customer Info Provided	all points earned for entering customer information in the myicard.net website
Point Threshold	The point balance wherein an account holder is eligible to receive an award	

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td rowspan="5">Award Type</td><td colspan="2">Specifies the type of award the account holder is eligible to receive</td></tr>
<tr><td>Select...</td><td>to award a/an...</td></tr>
<tr><td>Issue stored value credit</td><td>stored value credit on the card</td></tr>
<tr><td>Issue Immediate Discount</td><td>discount immediately redeemed within the transaction</td></tr>
<tr><td>Issue Coupon</td><td>coupon at the POS</td></tr>
<tr><td rowspan="8">Award Discount Type</td><td colspan="2">This field only becomes active if Issue Immediate Discount is selected as the Award Type. It specifies value of the discount from a check. You may select:</td></tr>
<tr><td>Select...</td><td>to...</td></tr>
<tr><td>Use Award Amount</td><td>if the award has a specified discount amount</td></tr>
<tr><td>Use Lowest Discountable Item</td><td>the discount will apply toward the most inexpensive eligible item on the check</td></tr>
<tr><td>Use Highest Discountable Item</td><td>the discount will apply toward the most expensive eligible item on the check</td></tr>
<tr><td>Use Percentage of Check Subtotal</td><td>the discount will apply toward the entire check subtotal</td></tr>
<tr><td>Use Percentage of Lowest Discount</td><td>the discount will apply toward the most inexpensive eligible item</td></tr>
<tr><td>Use Percentage of Highest Discount</td><td>the discount will apply toward the most expensive eligible item</td></tr>
<tr><td>Point Cost</td><td colspan="2">You may enter an numeric value for the amount of points that will be deducted to receive the award</td></tr>
<tr><td>Discount & Award Amount</td><td colspan="2">This field is required if Use Award Amount or Lowest/ Highest Discountable Item is specified as the Award Discount Type. Enter the amount by which the check will be immediately discounted</td></tr>
<tr><td>Discount Percentage</td><td colspan="2">This field is required if Use Percentage of Check Subtotal Highest/Lowest Discount is specified as the Award Discount Type. Enter the percentage by which the check will be immediately discounted</td></tr>
</table>

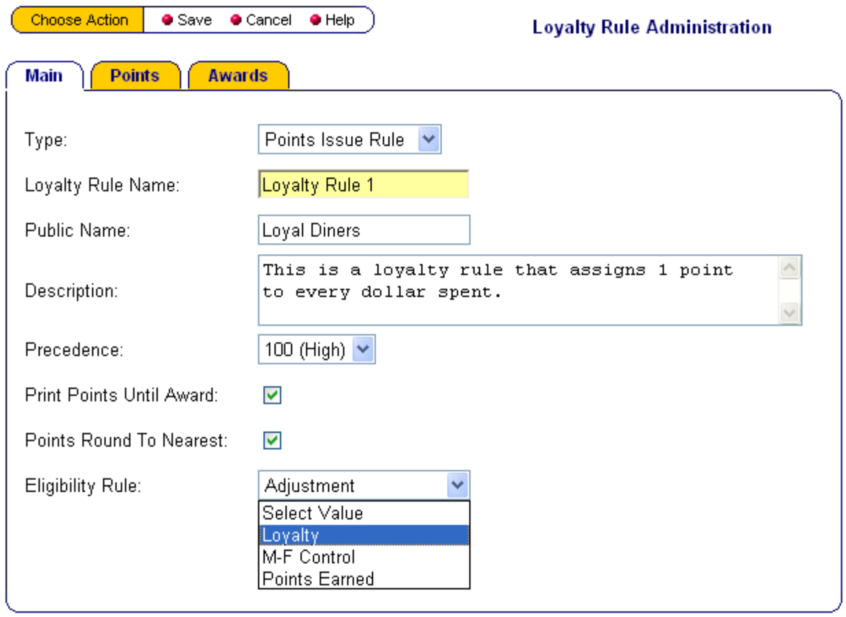
Field	Description
POS Print Text	Enter the text to print on the POS roll printer. Refer to iCare POS Printing for a list of Print Tokens and Print Directives that you can use to control the content and appearance of POS printing.
Coupon Code	If Coupon was selected as the Award Type, enter the Coupon Code that was created for the Coupon Type.
Once Per Year	Enable this option if the award is only issued one time in a calendar year
Once Per Lifetime	Enable this option if the award is only to be issued once in the existence of an account (ex. if New Customer Info Provided is selected as Use Points Total, the customer can only receive this award once)
Require Customer Info	Enable this option if you do not want to issue an award unless an account holder has provided personal information (name, address, birth date, etc.) to the myicard.net website.
Cross Point Threshold	Enable this option bit when creating point awards that are to be issued with a zero (0) value; this is for multi-tiered award programs wherein points do not reset. MICROS recommends having at least 1 resetting award. This resetting award threshold should be the highest possible award that can be received.

Create a Point Issue Rule

The Point Issue Rule specifies under what conditions the account holder will receive points. These points can be accumulated and applied toward the redemption of menu items, stored value, discounts, etc. To create a Point Issue Rule wherein every dollar spent equates to one point earned:

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Loyalty Rules | Add
2. On the Main Tab:
   a. Select the Point Issue Rule for the Type drop-down list
   b. Enter the name of the Loyalty Rule (ex. Points to Dollars)
   c. Enter a public name and a description (optional)
   d. Set the Precedence in the drop-down list
   e. Enable the Print Points Until Award and Points Round to Nearest options

f. Select an Eligibility Rule - defines which items are available

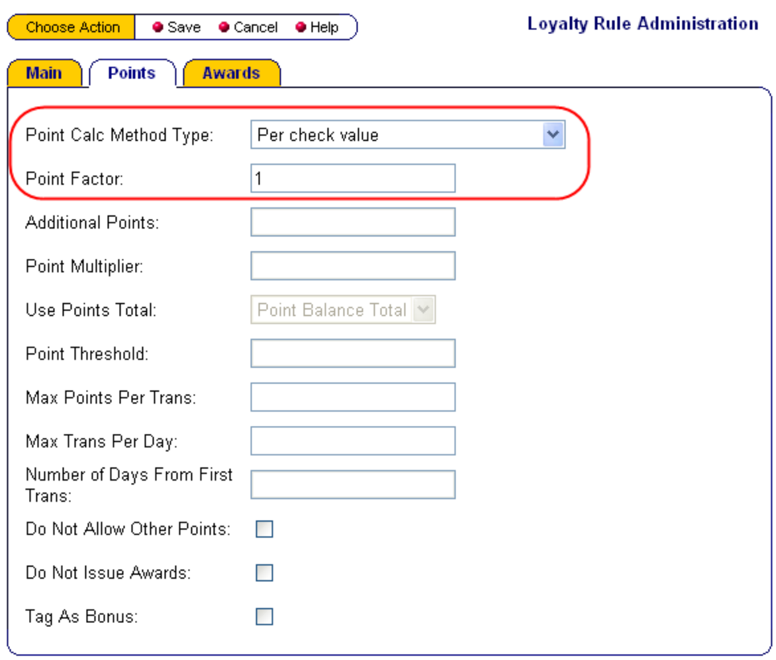


7. On the Points Tab:

   a. Specify the Point Calc Method Type

   b. Enter an integer in the Point Factor field

   c. All other fields are optional

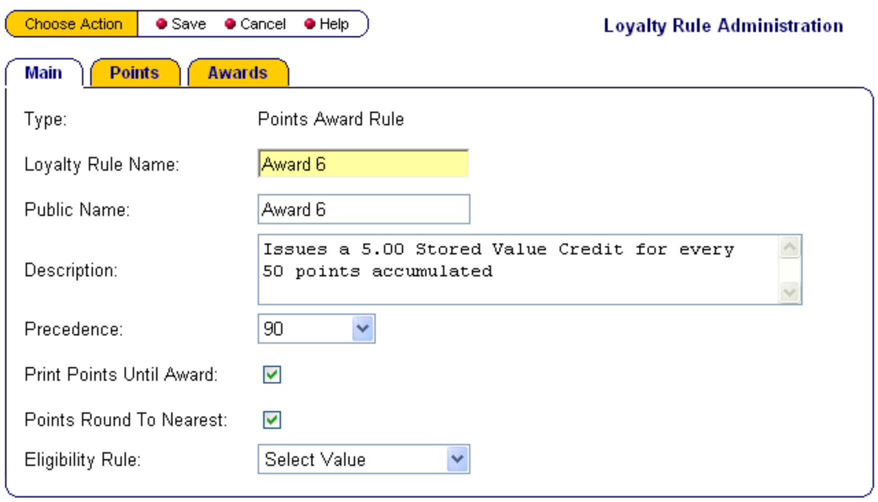


4. Save

Create a Points Award Rule

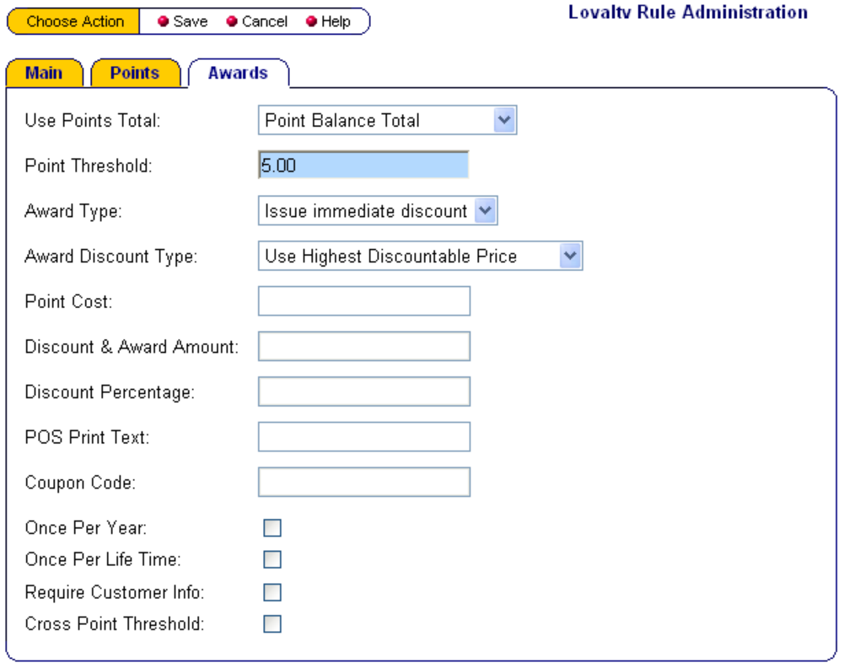
The Points Award Rules specifies what type of award the account holder can receive when accumulating the appropriate number of points. Awards can also be given based on an account holder fulfilling a requirements, such as providing customer information to the myicard.net website. To create a Point Award Rule where, when an account holder reaches the required number of points, $5.00 of stored value is applied to the account:

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons and Rules | Loyalty Rules | Add
2. On the Main Tab:
   a. Select Point Award Rule for the Type
   b. Enter the name for Loyalty Rule
   c. Enter a public name and a description (optional)
   d. Set the Precedence in the drop-down list
   e. Enable the Print Points Until Award and Points Round to Nearest option



6. On the Award Tab:
   a. Select Point Balance Total from the Use Points Total drop-down list
   b. Enter the Point Threshold
   c. Select Issue Stored Value Credit from the Award Type drop-down list
   d. Enter the number of points it will deduct from the account to issue the award
   e. Enter the amount to be awarded to the account in the Discount & Award Amount field

f. All other fields are optional



7. Save

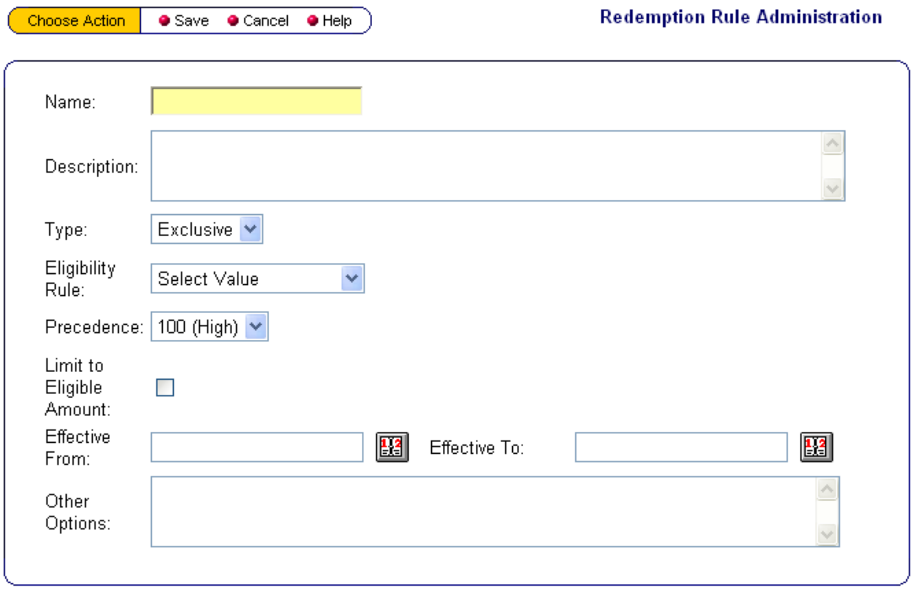
For the loyalty rules to be effective, they will be linked to the appropriate Card Programs. Point Issue Rules and Point Award Rules work together, therefore there will always be one of each that are associated to at least one Card Program.

Redemption Rules

Redemption rules are the rules stored on the card that govern how coupons are redeemed at the POS. The following page allows you to configure Redemption Rules for coupons.

Screen Overview

The following data describes the typical fields you will find when accessing the Redemption Rules configuration and set up screen:

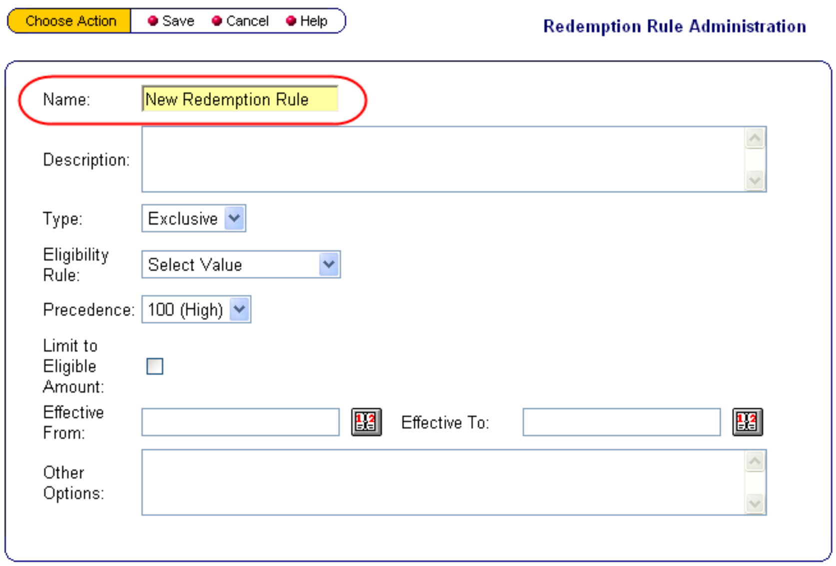


Field	Description
Name	Enter the name of the Redemption Rule
Description	200-character limit field where a brief description about the functionality of the Redemption Rule may be entered
Type	Select Exclusive if the redemption rule applies exclusive of specific items, combos, etc. For example, a redemption rule can be created that excludes transactions that include alcohol. Select Inclusive if the redemption rule is inclusive of specific items. For example, the purchase of an entrée may be required.
Eligibility Rule	If you have created Eligibility Rules for redemption you may select one from the list.
Precedence	Depending on the number of records you create, the guest may encounter a situation in which there are multiple, conflicting redemption rules. A precedence of 100 is the highest rank.
Limit to Eligible Amount	Enable option bit to limit the redemption rule to the eligible amount.

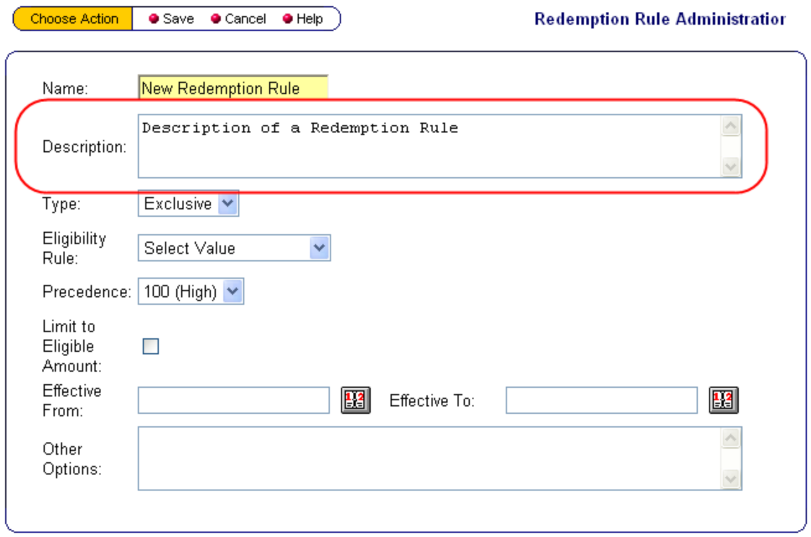
Field	Description
Effective From/To Dates	Enter the start and end dates for which this redemption rule is active
Other Options	Enter an value/code in this field (rarely used)

Create a Redemption Rule

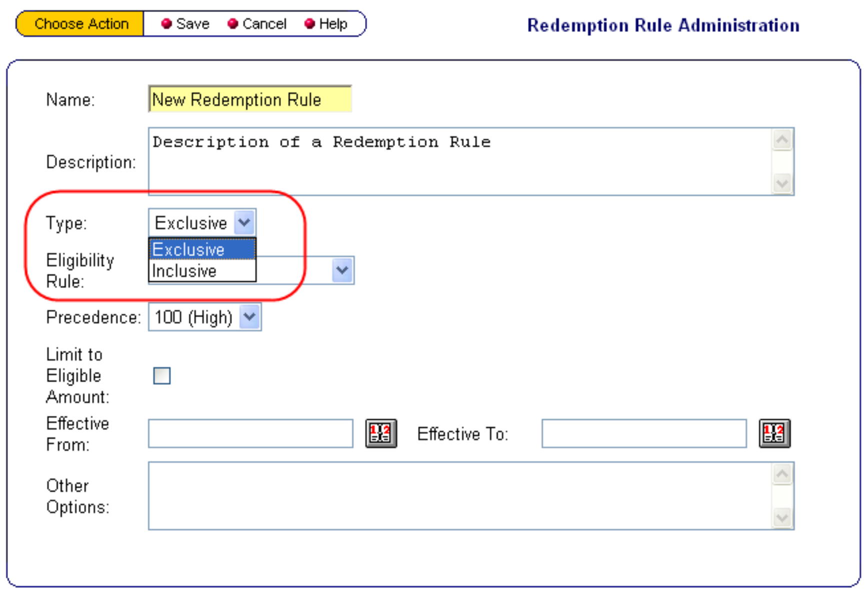
1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Redemption Rule | Add
2. Enter the name of the Redemption Rule



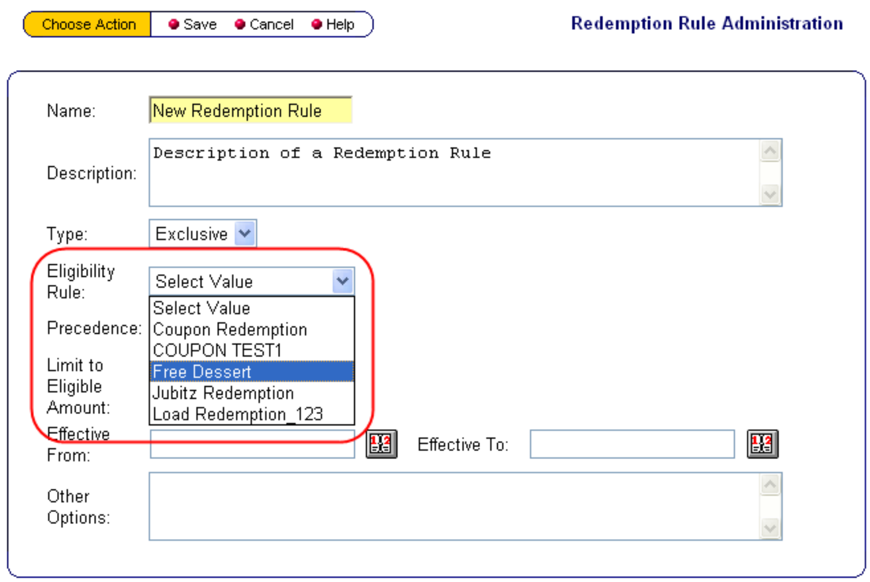
3. Enter a brief description for the Redemption Rule (optional)



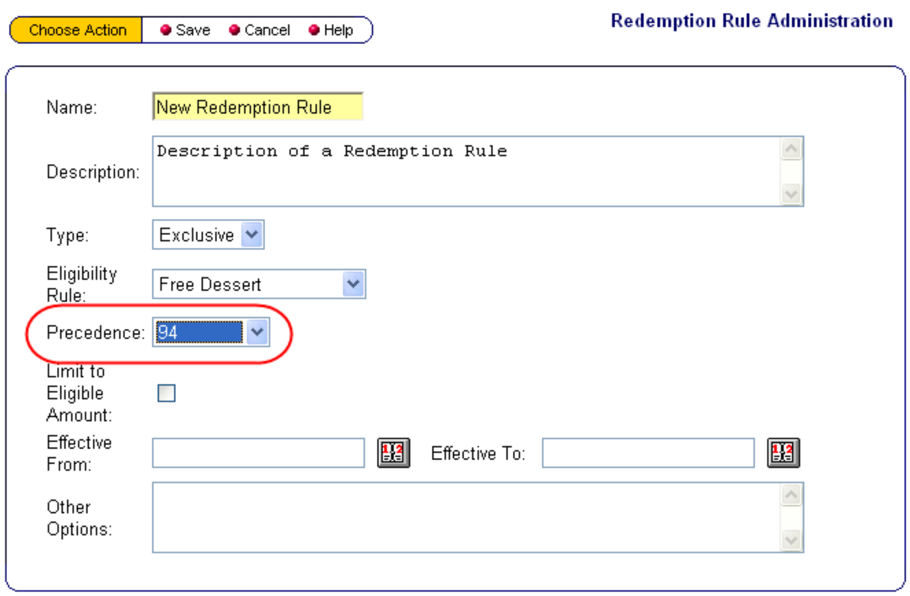
4. Specify Inclusive or Exclusive from the Type drop-down list



5. Select an Eligibility Rule (optional)



6. Set the Precedence (recommended)



7. All other fields are optional

For the redemption rules to be effective, they will be linked to the appropriate Eligibility Rules, and those Eligibility Rules are linked to the appropriate Loyalty Rules. Redemption rules may also be linked directly with Card Programs.

Redemption Merchandise

Use this area to define what kinds of merchandise will be eligible for redemption. Some organizations may want to have awards like a coffee cup with the organization's logo on it or a t-shirt available for redemption. It is in this area where those configurations may be created and modified.

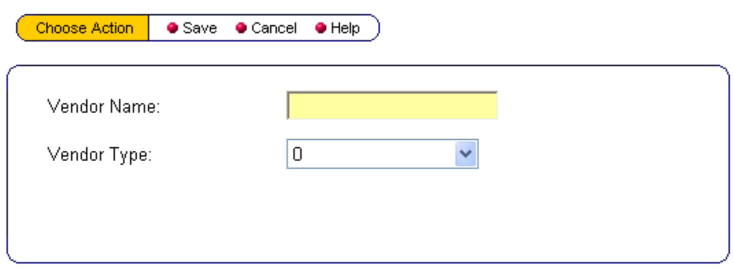
> *Note* — *In addition to the steps described in this section, the MICROS Implementation Team must perform additional actions to support this feature.*
>
> *If you are interested in this feature, please contact your MICROS Account Representative.*

Screen Overview

The following screens will be located within the Redemption Merchandise area:

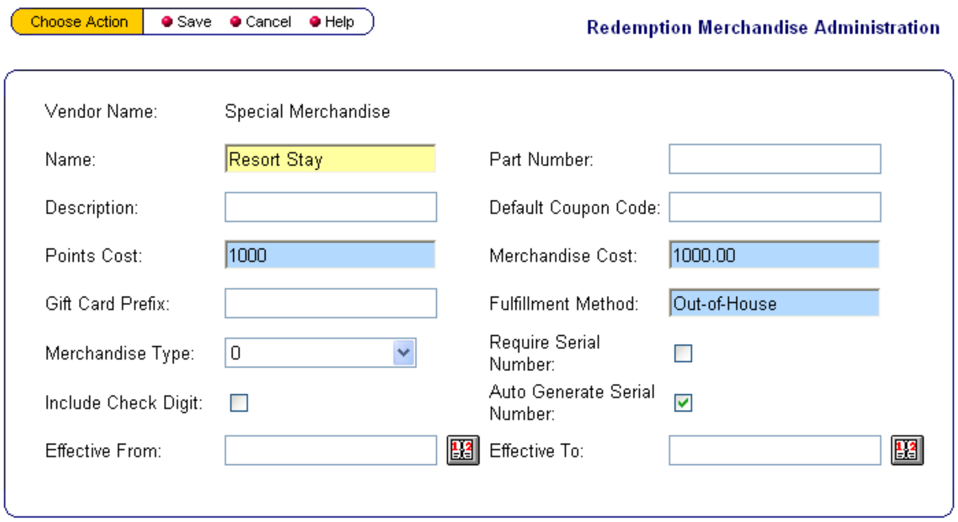
- Add Vendor Screen
- Edit Merchandise Screen

Add Vendor Screen



Field	Description
Vendor Name	Enter the name of the vendor
Vendor Type	Use the drop-down list to specify what type of vendor is being used

Edit Merchandise Screen



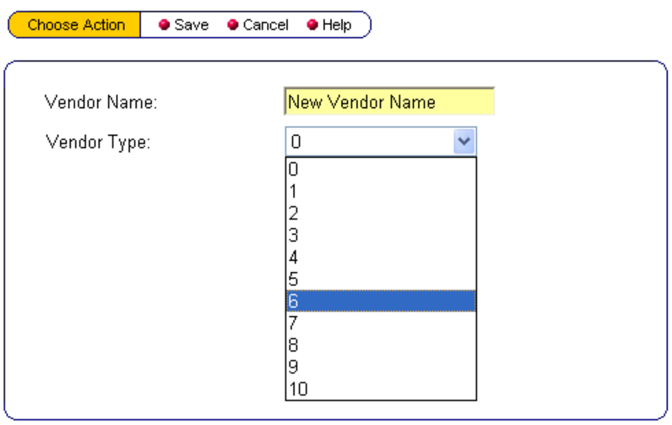
Field	Description
Vendor Name	Displays the name of the vendor
Name	Enter the name of the redemption merchandise (ex. Free T-Shirt, Resort Stay, Tango Lessons)
Part Number	Enter the part number for the merchandise (if any)
Description	Enter a description for the merchandise
Default Coupon Code	Enter the default coupon code for the merchandise (if any)
Points Cost	Enter the number of points required to redeem this award
Merchandise Cost	Enter the monetary amount of the merchandise
Gift Card Prefix	Enter the gift card prefix with the merchandise is associated (if any)
Fulfillment Method	Enter how the merchandise will be provided to the customer (in house, by mail, etc.)
Merchandise Type	Select the merchandise type (0-10)
Require Serial Number	Enable this option bit if redeeming points for this merchandise will require a serial number
Include Check Digit	Enable this option if a check digit should be included in the redemption of this merchandise

Field	Description
Autogenerate Serial Number	Enable this option bit if, by redeeming points for this merchandise, autogenerates a serial number
Effective From/To Dates	Enter the start and end dates for redeeming points for this merchandise award.

Configuring Redemption Merchandise

Add Redemption Merchandise

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Redemption Merchandise | Add
2. From the Vendors Overview page, click Add
3. Enter the name and vendor type for the new vendor

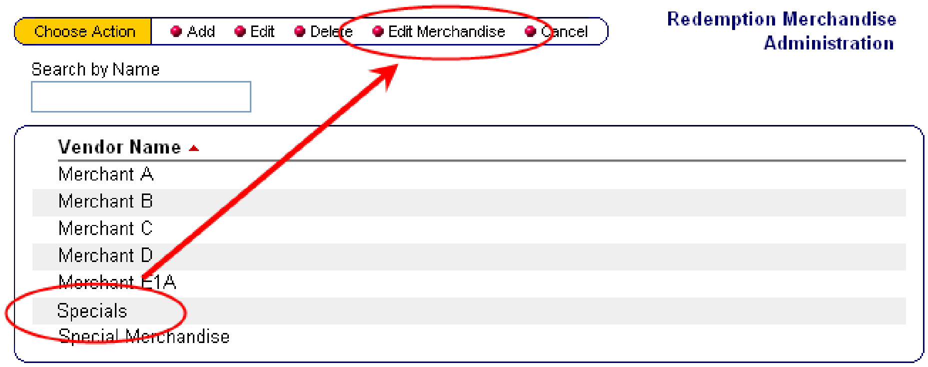


4. Save

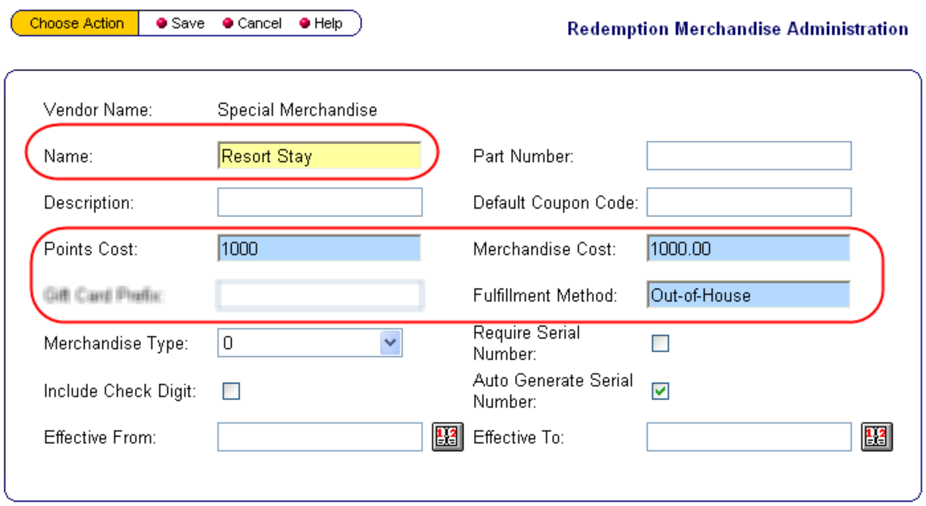
Edit Merchandise for a Vendor

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Redemption Merchandise

2. Select a vendor and click Edit Merchandise from the top menu bar



3. Enter the Name, Points Cost, Merchandise Cost, and Fulfillment Method



4. All other fields are optional
5. Save

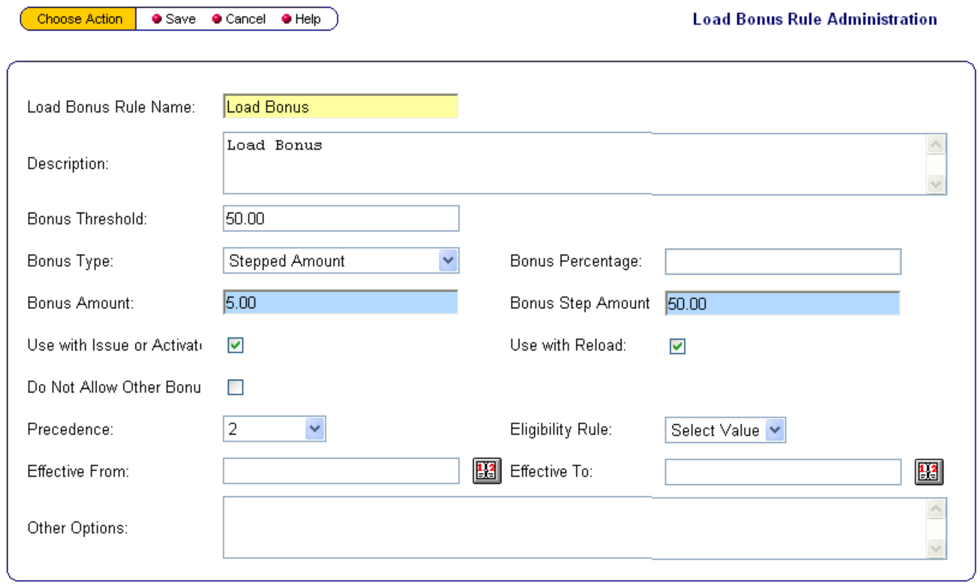
Load Bonus Rules

This menu allows you to configure Load Bonus Rules. A load bonus may be issued to a guest who adds value (i.e. loads purchasing power) onto a debit or gift card. A bonus may be issued on the initial loading of the card (e.g., “buy a $50 gift card and get a $5 bonus”), or the bonus may be issued when the card is reloaded (e.g., “receive a $5 bonus for every $50 of value that you add to your card”.)

Load Bonus Rules may also be used to “boost” point earning potential. An organization could decide that, after an account holder has accrued 100 points on his account at 1 point per each dollar spent, his accrual rate could increase to 2 points per each dollar spent for points 101 - 200. When the account holder gets to 201 points, the accrual rate could increase to 3 points for every dollar spent, and so on.

Screen Overview

The following describes the fields and options you will find on the Load Bonus Add/Edit page:



Field	Description
Load Bonus Rule Name	The name for the load bonus rule
Description	200-character field where a brief description about the purpose and functionality of the load bonus rule behavior may be entered
Bonus Threshold	The amount that must be loaded on to the card to qualify for a bonus.
Bonus Type	Specify whether the bonus is a percentage fixed monetary amount or stepped monetary amount
Bonus Percentage	If Percentage has been selected as the bonus amount, enter an integer in this field by which for the bonus
Bonus Amount	If Fixed Amount has been selected as the bonus type, enter the monetary amount by for the bonus

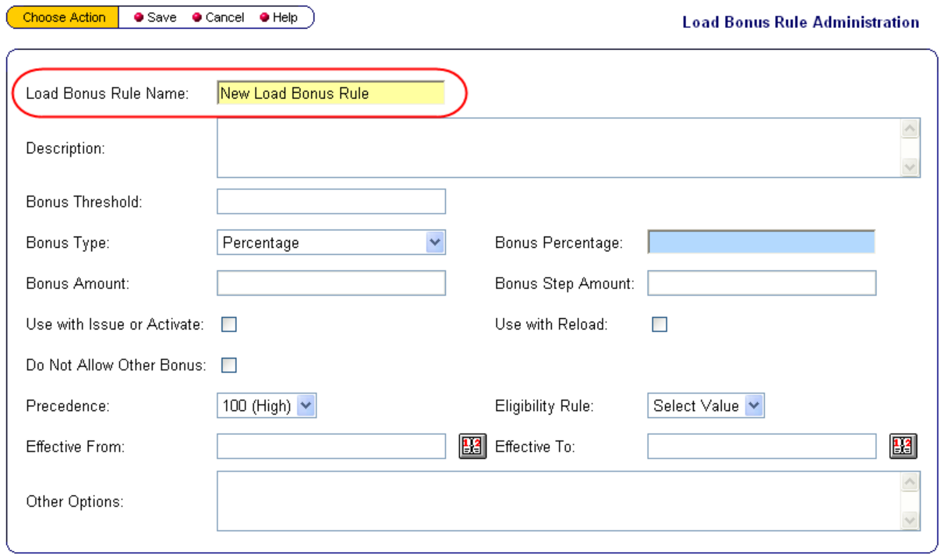
Field	Description
Bonus Step Amount	If Stepped Amount has been selected as the bonus type, enter the bonus amount and the bonus step amount by for the bonus. This step amount will be the only amount allowed for this rule. If you would like another step increase, you will need to create another load bonus rule
Use with Issue or Activate	Enable this option if the bonus is only available upon first issue or activation (ex. “Get $5 Just for Signing Up!”
Use with Reload	Enable this option if the bonus is available when the account holder adds stored value to the card
Do Not Allow Other Bonus	Enable this option to prevent other bonuses from being applied to this account (ex. “Not Valid With Any Other Offer”)
Precedence	Depending on the number of bonuses you create, the guest may encounter a situation in which there are multiple, conflicting usage rules. A precedence of 100 is the highest rank.
Eligibility Rule	If you have created an eligibility rule for the load bonus rule, link it here
Effective From/To Dates	Enter dates wherein this load bonus rule will be in effect. (ex. “Now through Christmas, get an extra 10% off every purchase”)
Other Options	Enter an value/code in this field (rarely used)

CONFIGURING LOAD BONUS RULES

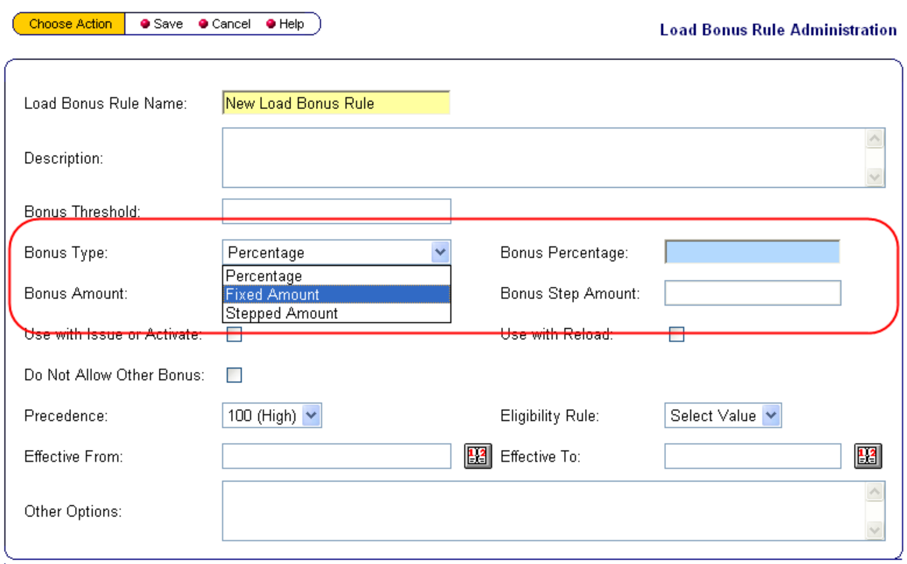
Define a Load Bonus Rule

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Load Bonus Rules | Add

2. Enter the name for the Load Bonus Rule:



3. Enter a description (optional)
4. Select a Bonus Type:
   a. If Percentage, then enter a Bonus Percentage amount
   b. If Fixed Amount, then enter a Bonus Amount
   c. If Stepped Amount, then enter a Bonus Amount and a Stepped Bonus Amount



4. All other fields are optional
5. Save

For the load bonus rules to be effective, they will be linked to the appropriate Card Programs within the Card Program configuration screen.

Programs

Programs are the iCare equivalent of grouping of rules and conditions to apply to various user accounts. Programs allow you to assign groups of rules and conditions to groups of users in a concise and easy to change format. This menu allows you to configure Programs.

TYPICAL CARD PROGRAMS

Some of the more common Card Programs are the standard Gift Card, which allows for funds to be appropriated to a card and, as that card is redeemed, the balance is reduced. One of the most typical Loyalty Programs is the “Points to Dollars” program, which allows points to be accrued based on the amount spent on a check or the number of eligible items purchased. Loyalty Programs generally offer some sort of award, be it stored value which can be redeemed later, an immediate discount at the POS, or a coupon which can also be redeemed at a later time.

There are, approximately, 5 Card Program Categories, that when configured and tweaked correctly, can account for most of, if not all, Card Programs. They can be generalized as the following:

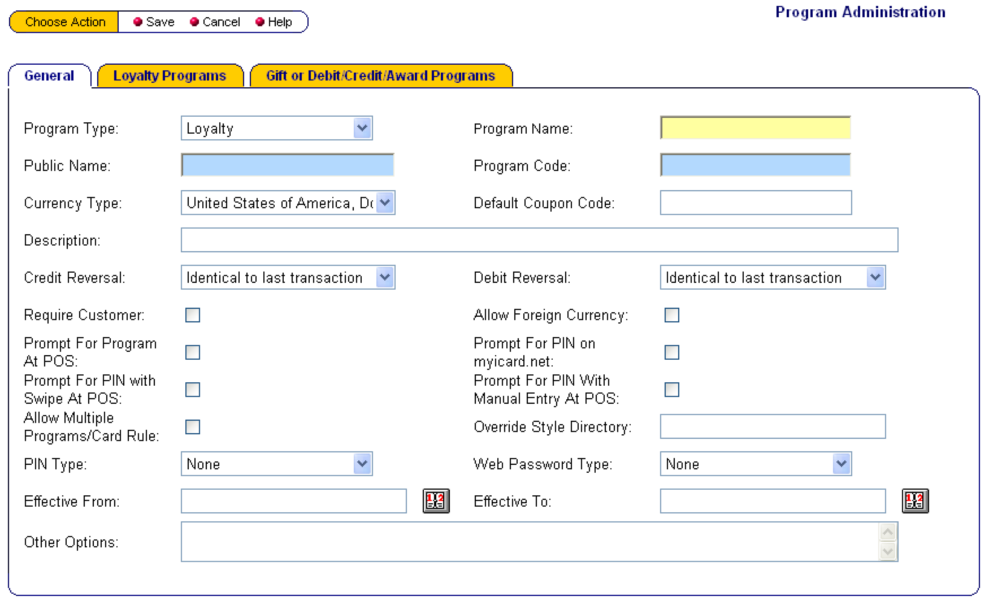
1. Standard Gift Card - open value or preset denomination
2. Points to Dollars - a loyalty program that allows points to build up based on some transaction data and provides an stored value award when a specified level or threshold is met
3. Points to Discount - a loyalty program that allows points to accumulate based on some transactional data and produces an immediate discount when the specified level or requirements are met
4. Coupon Award - a loyalty program that, where certain items and/or quantities must be purchased in order to receive a coupon award (ex. Buy 10 coffees, get a coupon for a free breakfast sandwich).
5. Discount Card - every time the card is swiped, a preset monetary or percentage discount is applied to the check (ex. Manager Meal Card offering 100% all manager meals).

SCREEN OVERVIEW

There are three tabs you will encounter when trying to set up a card program:

1. General - used by all Card Programs
2. Loyalty - used only by Loyalty Programs
3. Gift or Debit/Credit/Award Programs - used for every other type of Card Programs that **is not** a loyalty program

General Tab:

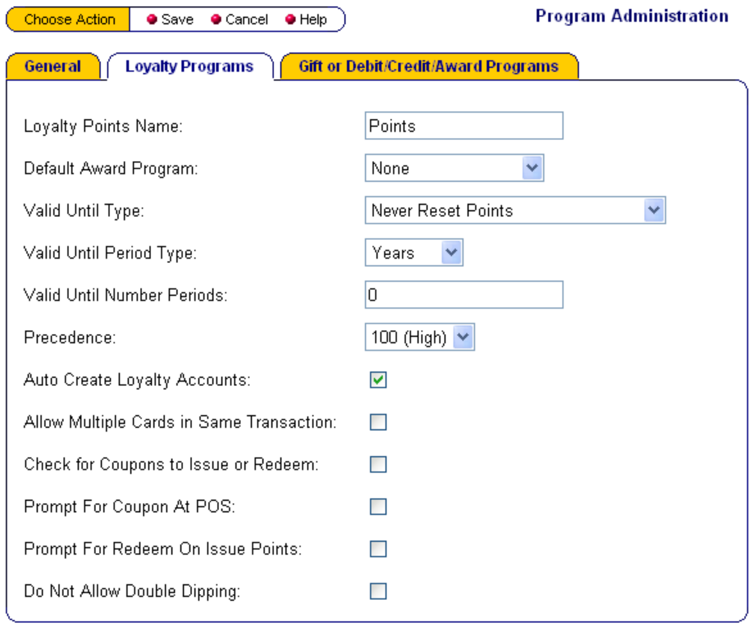


<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td rowspan="6">Program Type</td><td colspan="2">Select the type of Card Program to be configured.</td></tr>
<tr><td>Select this type...</td><td>to...</td></tr>
<tr><td>Loyalty</td><td>reward customers for specific behavior or specific purchases</td></tr>
<tr><td>Gift or Debit Card</td><td>have redeemable cards with a monetary value loaded on to them</td></tr>
<tr><td>Credit Card</td><td>have a card used for purchases that send a bill directly to the customer
Presently, cards cannot be linked to actual credit cards</td></tr>
<tr><td>Award</td><td>allow the organization to grant cash awards to customer who meet certain goals</td></tr>
<tr><td>Program Name</td><td colspan="2">Enter the name for the program</td></tr>
<tr><td>Public Name</td><td colspan="2">Enter the name that will be viewed by the public on both the reports and the myiCard.net website (ex. “Bobby’s Bucks” or “Platinum Club Member”)</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Program Code</td><td>Enter the code that is used to correlate iCare activity with POS activity. If the mymicros.net Enterprise Information Portal is used to track iCare activity, this field should use the same code as is used in the portal. This field has an 8-character limit</td></tr>
<tr><td>Currency</td><td>Use this field to specify which type of currency will be used for these transactions - US Dollar is the deafly</td></tr>
<tr><td>Default Coupon Code</td><td>The default coupon codes is the code that appears as the default when the coupon is first selected. This code can be changed, but use this field to pre-populate the field.</td></tr>
<tr><td>Description</td><td>This 200-character field can be used to enter comments, details, or notes for administrators who maintain this program.</td></tr>
<tr><td>Credit Reversal
Debit Reversal</td><td>Define the terms under which debit reversals (for debit cards) or credit reversals (for credit cards) are conducted.
<table>
<tr><th>Select this option...</th><th>to...</th></tr>
<tr><td>Do not allow</td><td>never allow credit or debit reversals</td></tr>
<tr><td>Same type and amount</td><td>if the transaction type and amount are the same as the original transaction</td></tr>
<tr><td>Same, type, amount and check</td><td>if the transaction type and amount are the same as the original, and if the reversal is being posted to the same POS guest check as the original credit or debit.</td></tr>
<tr><td>Identical to last transaction</td><td>if the reversal transaction is identical to the previous transaction that was posted.</td></tr>
</table></td></tr>
<tr><td>Require Customer</td><td>Select this option to prevent a card from being used in this program unless there is a customer associated with the card account. Clear this option if this program can be used with an anonymous account—one with which a customer is not associated.</td></tr>
<tr><td>Allow Foreign Currency</td><td>Select this option to allow foreign currency to be used in the transaction. Clear this option if the transaction must be conducted in the base currency.</td></tr>
</table>

Field	Description
Prompt for Program at POS	A card may be used for one or more programs in which a customer may or may not participate. If this option is selected, and if more than one program is in effect, the POS will prompt for the program to be used.
Prompt for PIN at myiCard.net	Check this check box if you want the system to prompt for a PIN on myICard.net. This PIN is stored in the myiCard system.
Prompt for PIN with Swipe at POS	Check this check box if you want the system to prompt for a PIN when the card is swiped at the POS.
Prompt for PIN with Manual Entry at POS	Check this check box if you want the system to prompt for a PIN if there is a manual entry of the card at a POS
Allow Multiple Programs/Card Rule	Enable this option if you want multiple GPL Programs to use the same card rule. This feature is not always available and is program dependent. MICROS recommends having separate card rules for each card program
Override Style Directory	MICROS Professional Services can configure an organization’s iCard site to use a separate style for each program. For example, members of the Ruby program who log into myiCard might see everything trimmed in red. Members of the Gold program might see gold, etc. If a custom style dictionary has been created specifically for this program, enter the name in this field
PIN Type	Select a PIN type from the drop down menu (ex. last for digits of SSN or numeric birthday)
Web Password Type	Select a Web Password type from the drop down menu (ex. last for digits of SSN or numeric birthday)
Effective From/To Dates	Enter the start and end dates for which this is active
Other Options	Enter an value/code in this field (rarely used)

Loyalty Programs Tab

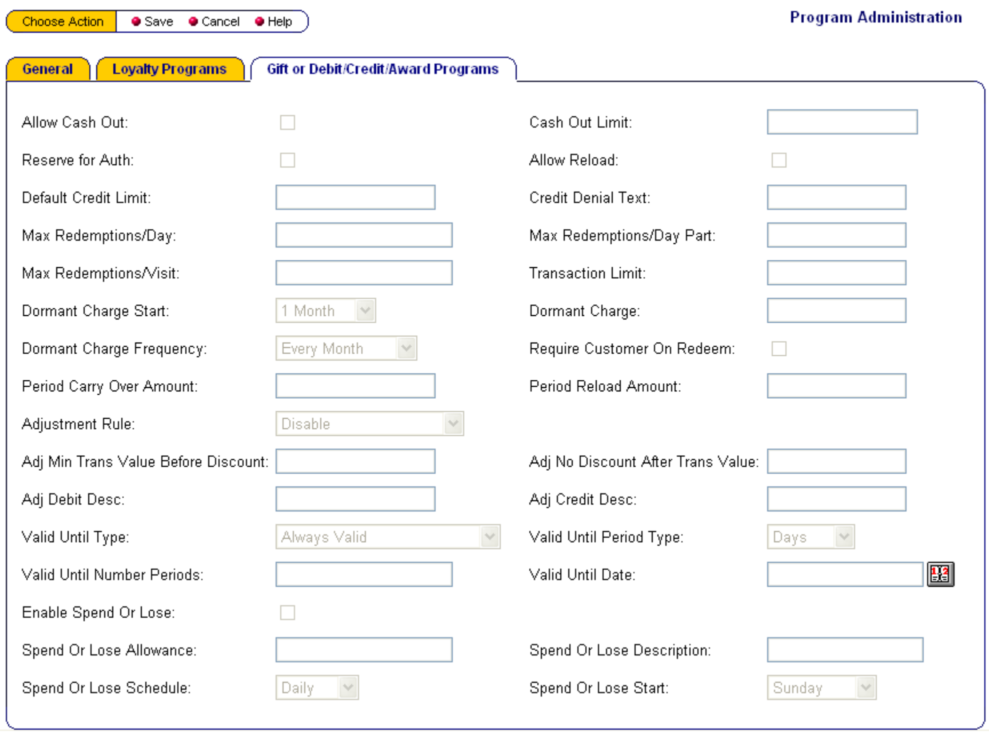


Field	Description	
Loyalty Points Name	Enter the name to be given to points in this loyalty program (ex. Bonus Bucks, Points, Chips, etc.)	
Default Awards Programs	Use the drop-down list to select from any existing Award programs	
Valid Until Type	Define the reset rule for this loyalty program	
	Select...	*to...*
	Never Reset Points	never reset points
	Reset Points after X Periods	reset points after a number of periods occur. ***defined below***
	Reset Points after X Rolling Periods	reset points after some number of rolling periods occur. ***defined below***
	Set Inactive After X Periods	set the account inactive after some number of periods occur. ***defined below***

Field	Description	
Valid Until Type (cont'd)	Set Inactive After X Rolling Periods	set the account inactive after some number of rolling periods occur. ***defined below***
Valid Until Period Type	Select the type of period (days, weeks, etc.) that defines when points are reset for this loyalty program, as defined in the Valid Until Type field.	
Valid Until Number Periods	Enter the number of periods before points are reset for this loyalty program, as defined in the Valid Until Type field	
Precedence	Specify the significance or ranking of the loyalty program. A precedence of 100 is the highest rank.	
Auto Create Loyalty Accounts	Select this option to automatically create a new loyalty account when a new card number is encountered in a transaction. Clear this option to require that a loyalty account number be set up in advance for every card number. This option should be enabled 95% of the time.	
Allow Multiple Cards in the Same Transaction	Select this option to allow multiple loyalty cards to be accepted in the same transaction. Clear this option to allow only one loyalty card to be accepted.	
Check for Coupons to Issue or Redeem	Select this option to force the system to check for coupons. If this option is checked, then during a transaction the system will read through the program rules that apply to the current customer's account. If the customer is owed a coupon (e.g., because of some program requirement that has been met), then the system will issue the coupon or award a discount, which is applied against the current transaction. This process can be resource-intensive. Clear this option to prevent the system from checking for coupons to issue or redeem during a transaction.	
Prompt for Coupon at POS	Check this box if you want to be prompted for the coupon at the POS.	

Field	Description
Prompt for Redeem on Issue Points	Enable this option if, when the card is swiped, the account holder will have the option of redeeming their award within a point issuance transaction.
Do Not Allow Double Dipping	Enable this option to restrict the account holder from redeeming points for awards within the same transaction those points were accrued.

Gift and Debit/Credit/Award Programs Tabs



Field	Description
Allow Cash Out	This option is active only for debit or gift cards. Select this option to allow the guest to cash out some or all of the cash balance on a card in this program. Clear this option to allow the guest to use cards only for purchases.
Cash Out Limit	This option is active only for debit cards. If the guest is allowed to cash out cards in this program, enter a dollar limit on that cash out

Field	Description
Reserve for Auth	This option is active only for debit cards. Enter an amount to put on hold (in a suspend account) when a debit card is used and an authorization is performed. For example, the debit card may be used to make a payment in a situation that requires a charged tip. Any unused reserve (on-hold) amount is freed if not used within eight hours, or if there is any further transaction activity on the guest check which initially triggered the reserve.
Allow Reload	This option is active only for debit cards. Select this option to allow the guest to reload value on cards in this program (e.g., by paying cash at the POS in order to add to the balance on the card.) Clear this option to prevent cards from being reloaded. (Single-use card.)
Default Credit Limit	This option is active only for credit cards. Enter a default credit limit for cards in this program.
Credit Denial Text	This option is active only for credit cards. Enter up to 80 characters of text to send to the POS if a charge has to be denied. Example: “Please contact Customer Service at (800) 555-1234.” This text displays on POS screens.
Max Redemptions/ Day Max Redemptions/ Day Part Max Redemptions/ Visit	Enter the maximum number of times that a guest can redeem a reward in a single day, in the same day part, or in a single visit.
Require Customer on Redeem	Enable this option if you want to require customers to enter and provide their personal information via the myiCard.net website before allowing an award to be issued.
Dormant Charge Start	This option is active only for debit cards and awards. Enter the number of months (up to 60) after which a dormant account begins to be charged.
Dormant Charge	Enter the number of [points, dollars, bonus bucks] that will be charged to a dormant account after the Dormant Charge Start period has expired
Dormant Charge Frequency	Enter the frequency (1 – 24 months) with which a dormant account is charged.

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td>Period Carry Over Amount</td><td colspan="2">When you have a defined period that triggers certain rules, use this field to limit the amount that can be carried over from one period to another.</td></tr>
<tr><td>Adjustment Rule</td><td colspan="2">If there are any associated adjustment rules</td></tr>
<tr><td>Period Reload Amount</td><td colspan="2">If you want to use the defined period as a trigger to automatically add an amount per period, enter that amount in this field. This amount will be added every time there is a new period</td></tr>
<tr><td>Adj Min Trans Value Before Discount</td><td colspan="2">The minimum amount by which the transaction can be adjusted before the discount can be applied</td></tr>
<tr><td>Adj No Discount After Trans Value</td><td colspan="2">No adjusted discount based on the transaction value</td></tr>
<tr><td>Adj Debit Desc</td><td colspan="2">Description of the adjusted debit</td></tr>
<tr><td>Adj Credit Desc</td><td colspan="2">Description of the adjusted credit</td></tr>
<tr><td rowspan="7">Valid Until Type</td><td colspan="2">Use this field to define when the program expires</td></tr>
<tr><td>Select the type...</td><td>for a program that...</td></tr>
<tr><td>Always Valid</td><td>never expires</td></tr>
<tr><td>Valid for X Periods</td><td>runs for a fixed number of periods</td></tr>
<tr><td>Valid Until Period End Date</td><td>runs until the end of a specific period</td></tr>
<tr><td>Valid Until Date</td><td>expires on a specific date</td></tr>
<tr><td>Set Inactive After X Periods of Inactivity</td><td>will be set to inactive at after a specified amount of time with no activity</td></tr>
<tr><td>Valid Until Period Type</td><td colspan="2">If the Valid Until Type is defined by periods, the types of period will need to be defined (days, weeks, months, etc.)</td></tr>
<tr><td>Valid Until Number of Periods</td><td colspan="2">If the Valid Until Type is defined by a number of periods, enter the numeric value for that number of periods in this field</td></tr>
<tr><td>Valid Until Date</td><td colspan="2">If the Valid Until Type will end on a certain date, enter that date in this field.</td></tr>
</table>

Field	Description
Enable Spend Or Lose	Enable this option if the card program will support the Spend or Lose functionality Fore more information on the Spend or Lose functionality, please refer to the Spend or Lose Program document.
Spend Or Lose Allowance	Enter the amount by which the card will be “reset” at defined intervals for the Spend or Lose functionality
Spend Or Lose Description	Enter a brief description for the Spend or Lose behavior for the card program
Spend Or Lose Schedule	Specify the intervals at which the Spend or Lose functionality will “reset” Options include: ◆ Daily ◆ Weekly ◆ Monthly
Spend Or Lose Start	If Weekly is defined as the Spend Or Lose Schedule, you will be required to specify the day of the week for the “allowance reset” (Monday, Tuesday, Wednesday, etc.)

LEGISLATION: DORMANT CHARGES AND EXPIRATION DATES

In the U.S., each state legislature mandates how dormant charges may be applied, and how expiration of gift certificates or gift cards must be handled. In some U.S. states, *escheat* laws mandate that some or all of the unclaimed amounts left on card accounts become the property of the state. The National Association of State Legislatures maintains a state-by-state listing of *Legislation Regarding Gift Cards and Gift Certificates* at: http://www.ncsl.org/programs/banking/giftcardsandcerts.htm.

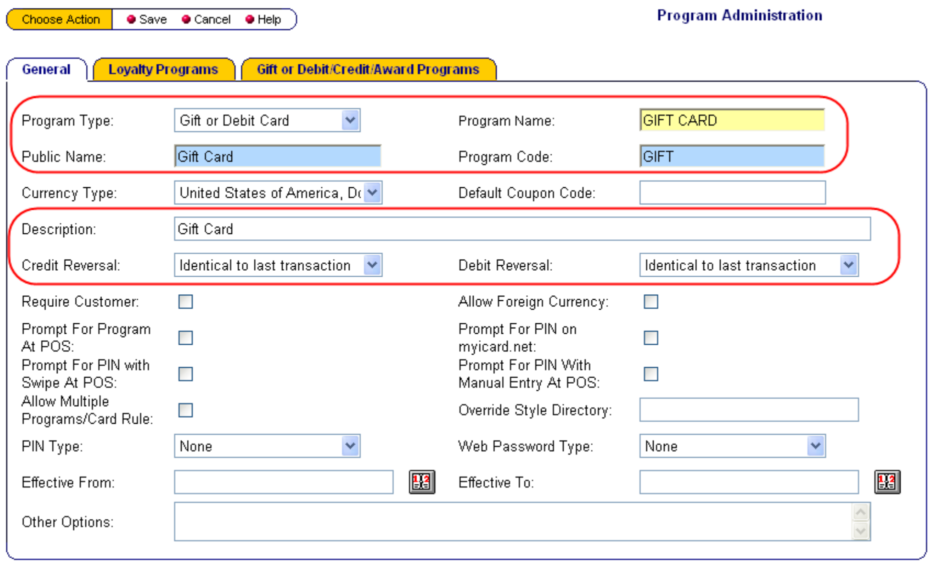
This list includes existing legislation that has been enacted, as well as new legislation that has been proposed.

CONFIGURING CARD PROGRAMS

Create a Gift Card

The following is the typical set up for a gift card program within the Programs module. This is not intended to include the complete configuration steps for setting up a Program to work with the POS. In addition to setting up the programs, card rules, POS configuration, etc., is required to fully implement a gift card program. These are the “basic” steps that would be carried out to complete this task in this section:

1. Navigate iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Programs | Add
2. On the General Tab:
   a. Select Gift or Debit Card from the Program Type drop-down
   a. Enter Gift Card (or some variation) in the Program Name, Description, Program Code, and Public Name fields
   b. Select Identical to Last Transaction for both the Credit Reversal and Debit Reversal



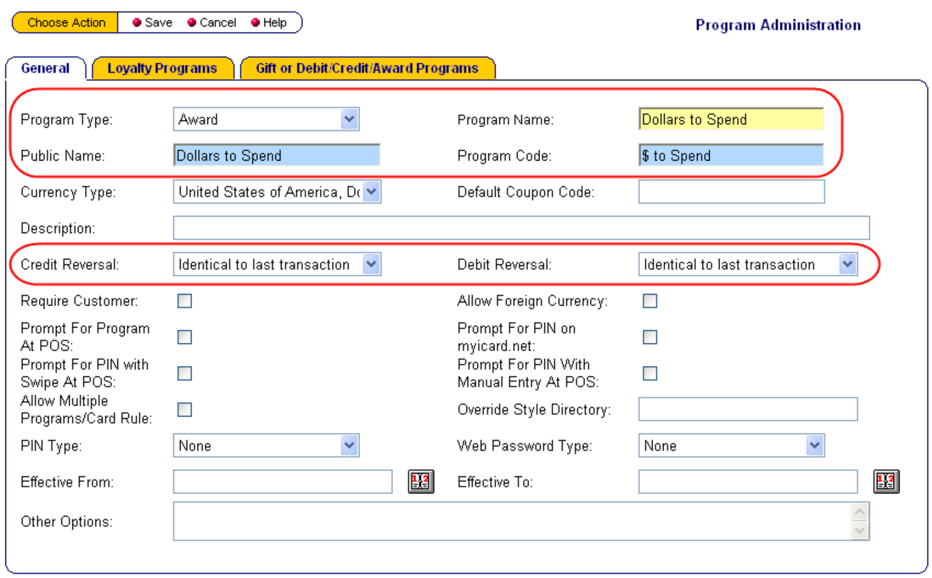
   c. All other fields are optional and are based on customer specification
4. On the Gift or Debit/Credit/Award Programs Tab, modify according to customer specification
5. Save

Note	*When organizations decide to purchase the iCare Stored Value Solution, they are required to complete a questionnaire that details the specifics of their Card Programs.* *The instructions above are in no way meant to be a complete example of configuring a gift card program, but rather an overview of what type of information and steps would be involved in gift card development.*

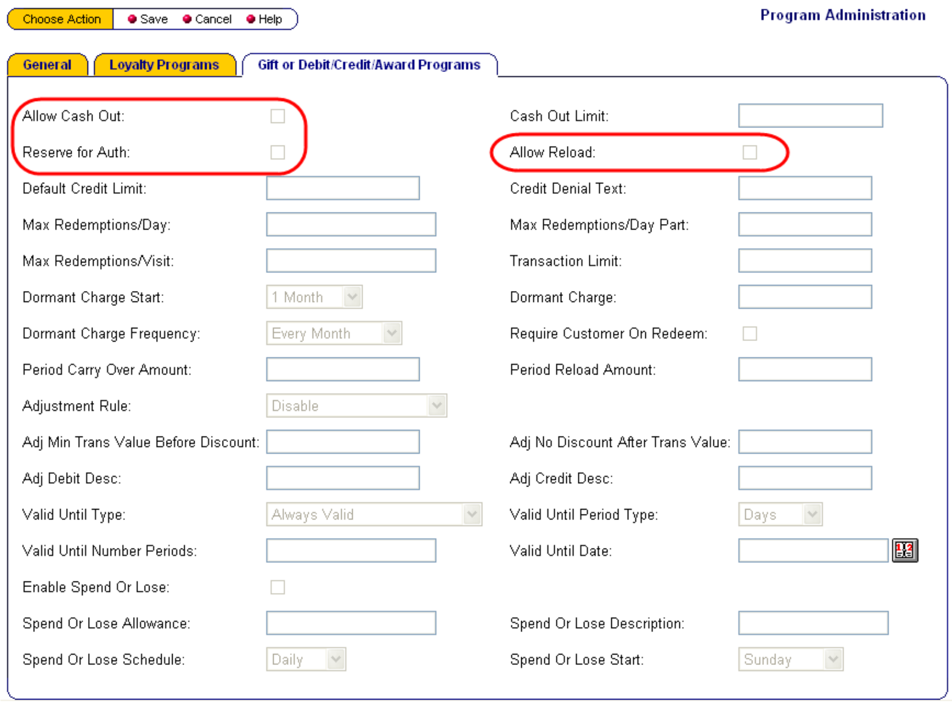
Create a Loyalty Program (Points to Dollars)

The following is the typical set up for a points to dollars loyalty program within the Programs module.This is not intended to include the complete configuration steps for setting up a Program to work with the POS. In addition to setting up the programs, card rules, POS configuration, etc., is required to fully implement a loyalty program. Loyalty Programs have, as previously mentioned, the need for two rules to create one a program (Point Issuance and Point Award) that must be linked before the program will function properly. The following steps only discuss configuring the Loyalty Program within the Program Module:

1. Navigate to iCare Admin | iCare Config | Programs Cards, Coupons, and Rules | Programs | Add
2. On the General Tab:
    a. Select Award from the Program Type drop-down list
    b. Enter Dollars to Spend in the Program Name, Description, and Public Name fields
    c. Enter $to Spend in the Program Code field
    d. Select Identical to Last Transaction for both the Credit Reversal and Debit Reversal

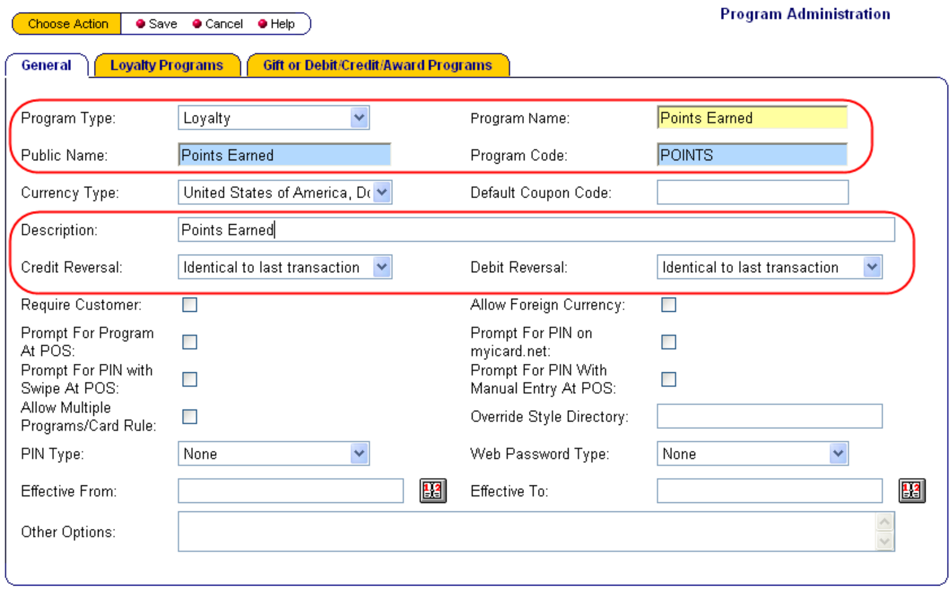


5. On the Gift or Debit/Credit/Award Programs Tab, enable Allow Cash Out, Reserve for Auth, Allow Reload:



6. Save
7. Click Add from the top menu bar to add the loyalty program
8. On the Loyalty Programs Tab:
   a. Select Loyalty from the Program Type drop-down list
   b. Enter Points Earned in the Program Name, Description, and Public Name field
   c. Enter POINTS EARNED in the Program Code field

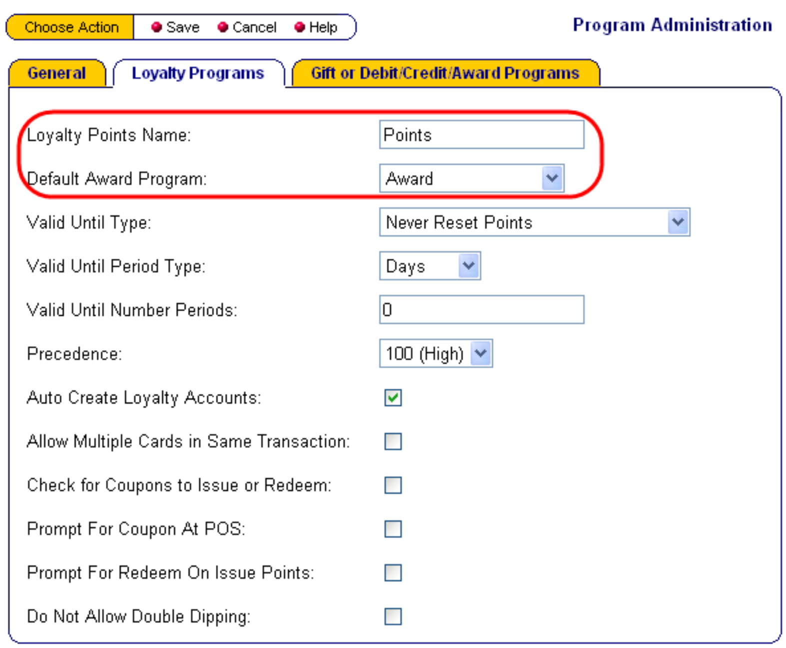
d. Select Identical to Last Transaction for both the Credit Reversal and Debit Reversal



5. On the Loyalty Programs Tab:

a. Enter Points in the Loyalty Points Name field

b. Select the recently created award program ($to Spend) from the Default Award Program drop-down list



c. All other needs are determined by the customer

4. Save

Note	*When organizations decide to purchase the iCare Stored Value Solution, they are required to complete a questionnaire that details the specifics of their Card Programs.* *The instructions above are in no way meant to be a complete example of configuring a points to dollars loyalty card program, but rather an overview of what type of information and steps would be involved in gift card development.*

EDITING RULES AND CUSTOM TRANSACTIONS

A number of rules and restrictions are created in other modules beneath the Programs, Cards, Coupons, and Rules Categories. For these Rules to be effective, they must be linked to (a) other rules or (b) card programs. These rules help define the functionality of the various card programs that can be created. As mentioned before, rules include the following:

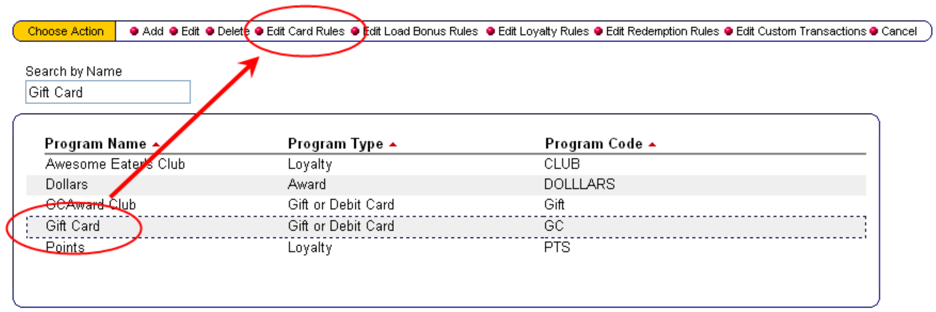
- Card Rules
- Eligibility Rules
- Redemption Rules
- Loyalty Rules
- Load Bonus Rules

The purpose and creation of these rules have already been discussed in previous sections of this document. With respect to card programs, Card Rules, Loyalty Rules, Load Bonus Rules, and Redemption Rules can all be linked to the actual program. Eligibility Rules are generally linked to a Redemption or Loyalty Rule, which is then subsequently linked to the Card Program.

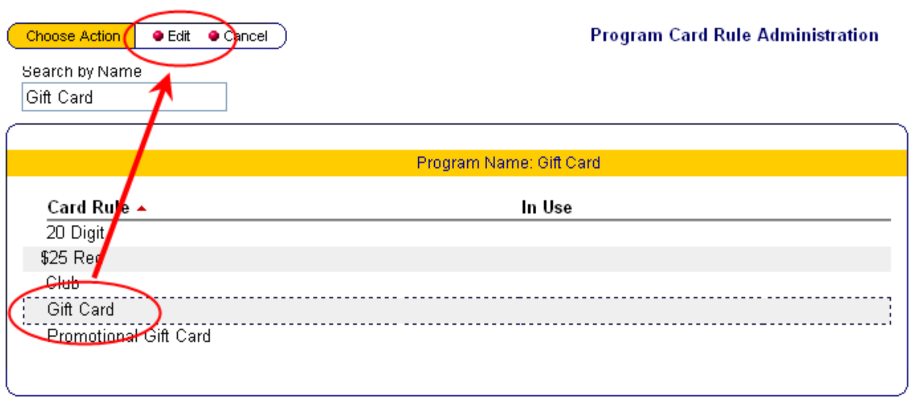
Rules, obviously, cannot be linked to Card Programs until Card Programs are created, therefore, linking rules is usually one of the final steps to card program configuration.

Link a Card Rule

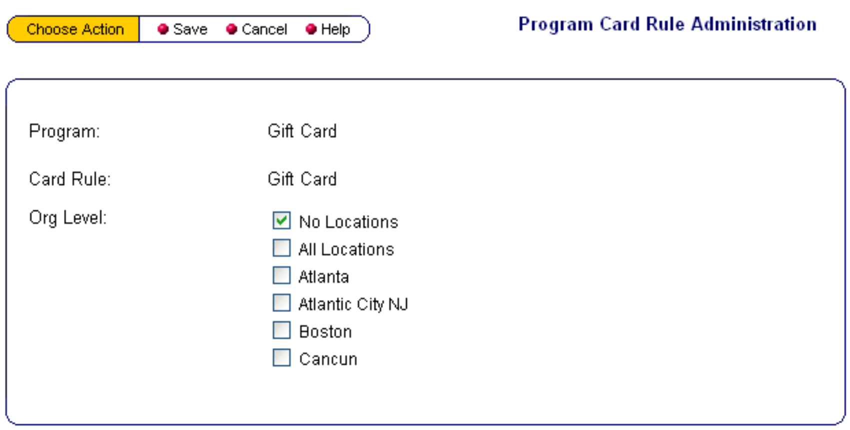
1. Select a Program name and click Edit Card Rules from the top menu bar



2. Select the Card Rule that will apply to this card and click Edit from the top menu bar

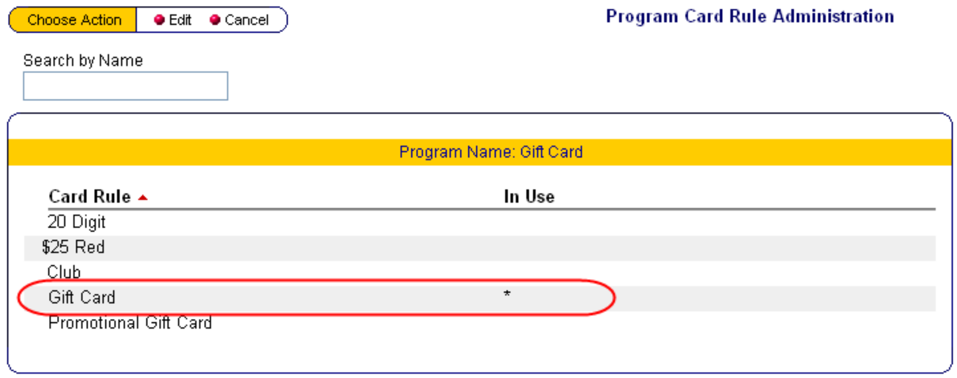


3. Specify the location(s) where this card will be effective or select All Locations for this card to be effective at all locations or No Locations to have this card be inactive at all locations



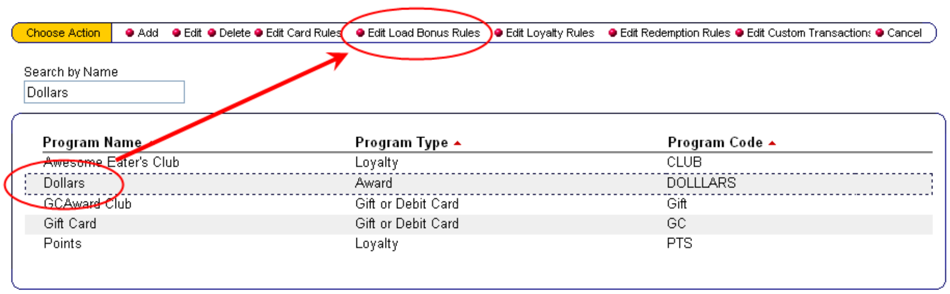
4. Save

The Card Rule will now have an asterisk (*) next to it in the In Use column:

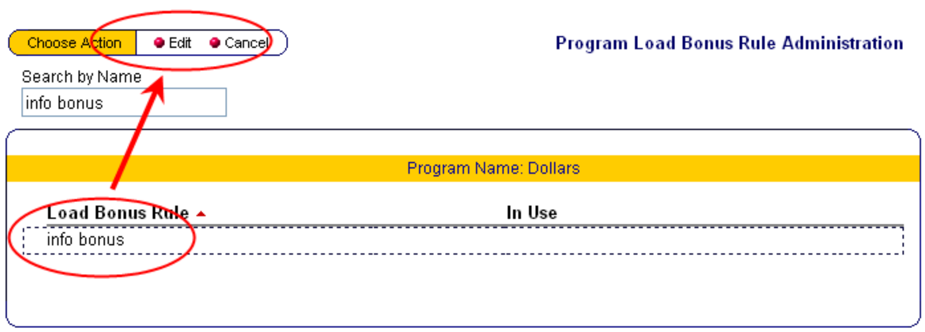


Link a Load Bonus Rule

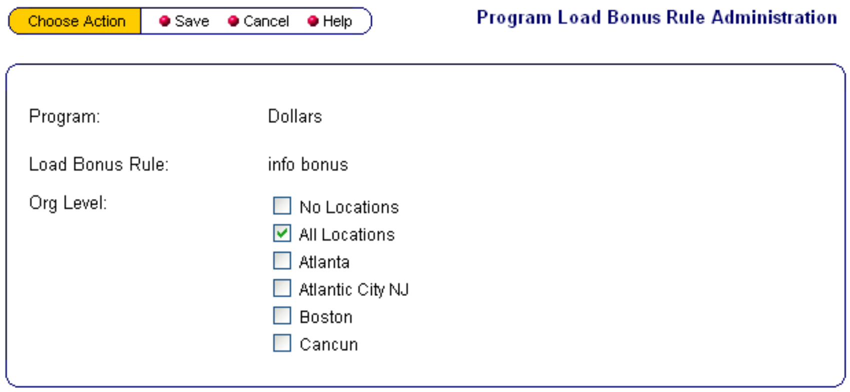
1. Select a Program name and click Edit Load Bonus Rules from the top menu bar



2. Select the Load Bonus Rule that will apply to this Program and click Edit from the top menu bar

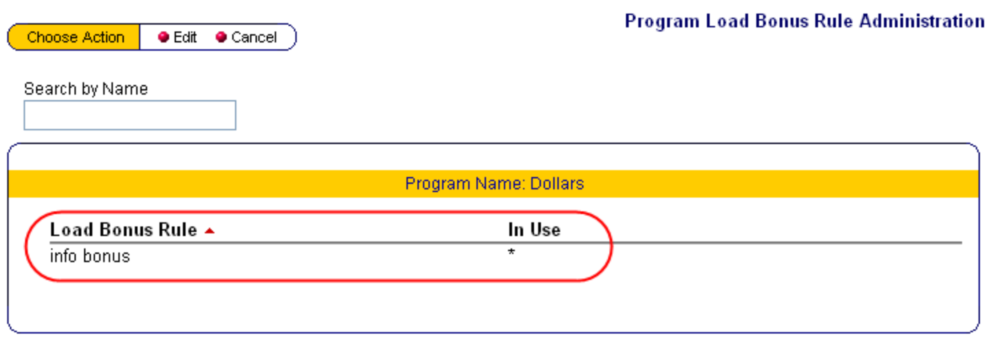


3. Specify the location(s) where this rule will be effective or select All Locations for this rule to be effective at all locations or No Locations to have this rule be inactive at all locations



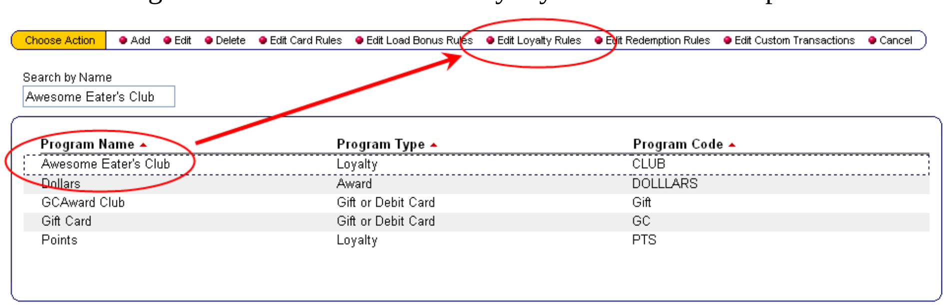
4. Save

The Load Bonus Rule will now have an asterisk (*) next to it in the In Use column:



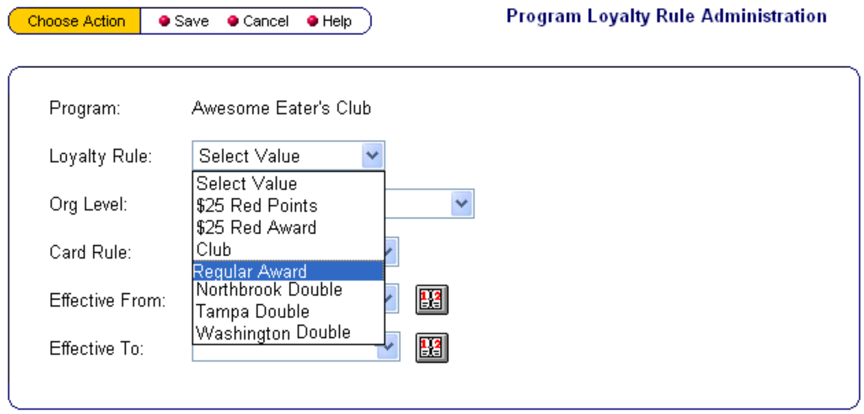
Link Loyalty Rules

1. Select a Program Name and click Edit Loyalty Rules from the top menu bar



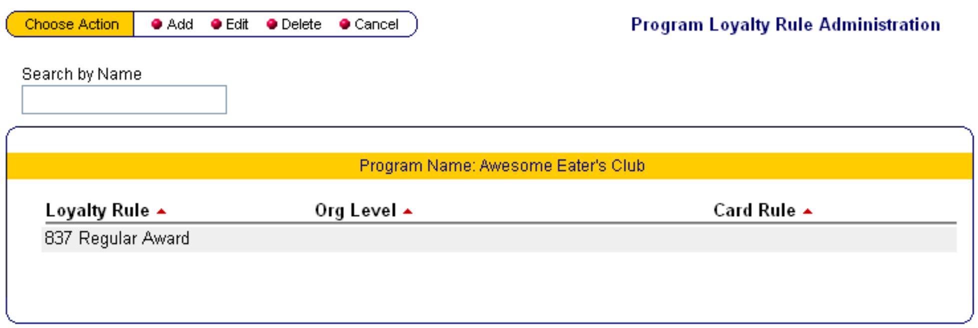
2. Click Add to apply Loyalty Rules to this Card Program

3. Select a Loyalty Rule from the drop-down list



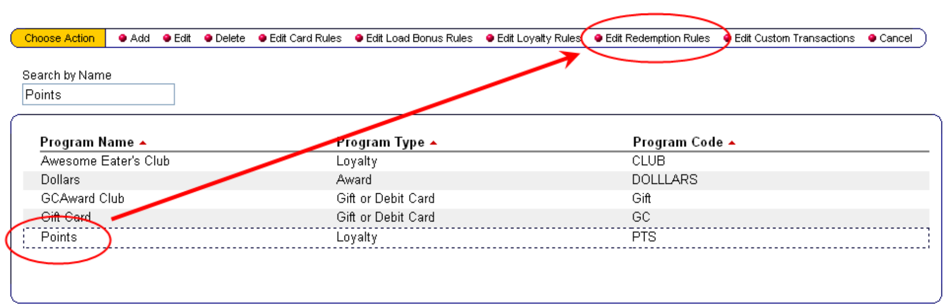
4. All other fields are optional
5. Save

The selected loyalty rule will now appear under the Card Program information:

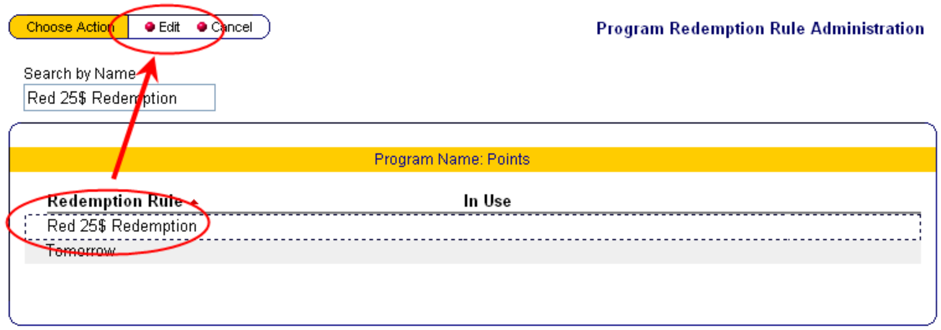


Link Redemption Rules

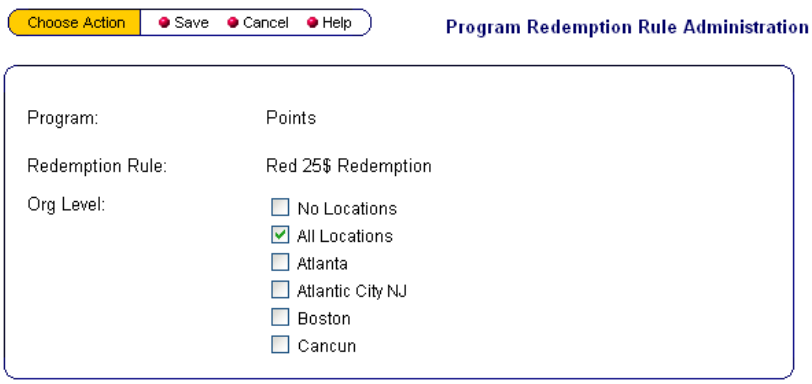
1. Select a Program name and click Edit Redemption Rules from the top menu bar



2. Select the Redemption Rule that will apply to this Program and click Edit from the top menu bar

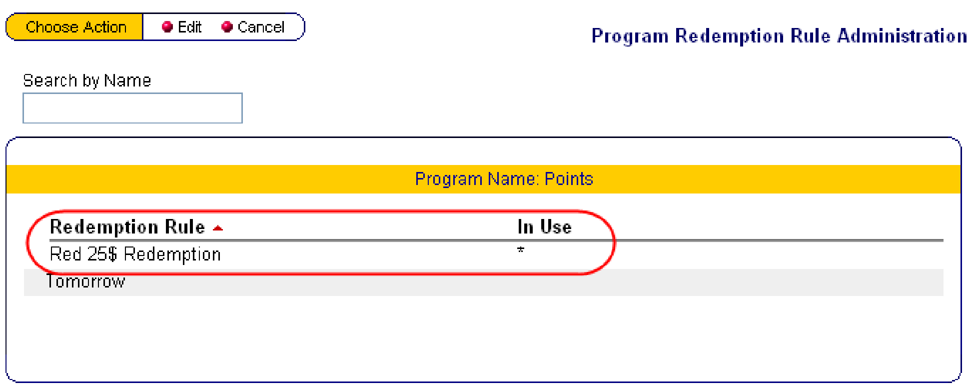


3. Specify the location(s) where this rule will be effective or select All Locations for this rule to be effective at all locations or No Locations to have this rule be inactive at all locations



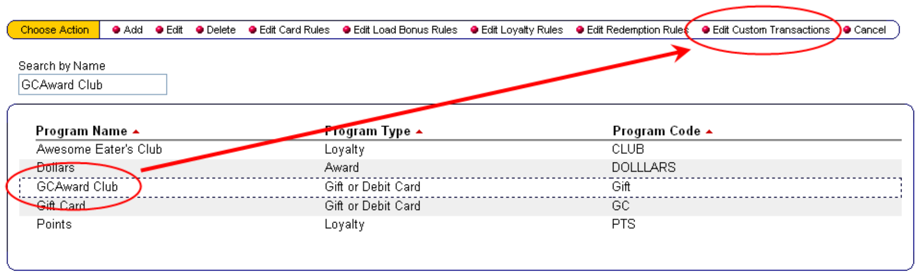
4. Save

The Redemption Rule will now have an asterisk (*) next to it in the In Use column:

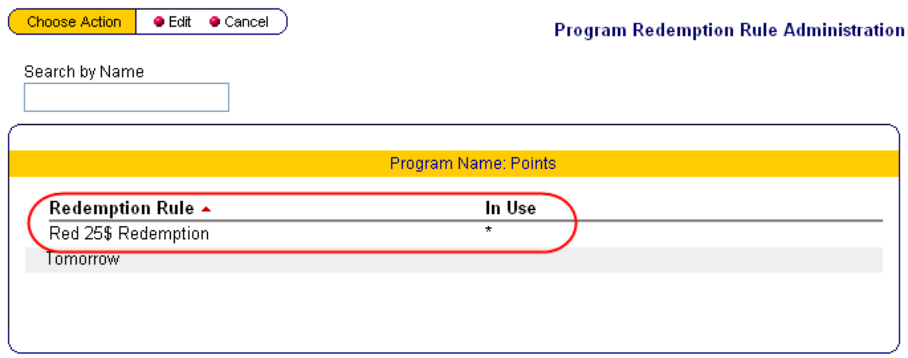


Link Custom Transactions

1. Select a Program Name and click Edit Custom Transactions from the top menu bar



2. Click Add to apply a Custom Transaction to this Card Program
3. Select a Custom Transaction from the drop-down list



4. Specify the number (1 - 5)
5. Save

POS Configuration

POS Keys must be configured to communicate with the iCare Application. Essentially, an installer will create and assign keys or “buttons” on the POS that correlate to some type of iCare Function, like Issue a gift card or Redeem Points for a loyalty card. Each of those buttons has a corresponding number associated with it at the POS level. The installer provides those numbers to the individual(s) responsible for configuring the Card Programs. These numbers are then implemented in this section so that when the button is pushed at the POS, the settings configured in the portal can accurately determine what type of function is taking place.

The following POS Request Codes should be made active when configuring an iCare Gift, Payment, or Loyalty Program:

- Coupon Inquiry
- Custom Message
- Point Balance
- Point Issue

- Accept Coupon
- Activate
- Balance Inquiry
- Balance Transfer
- Cash Out
- CRM Transaction
- Issue
- Redemption
- Redemption Authorization
- Reload

The types of classifications and keys are:

Function	POS Keys	Notes
Menu Items **OR** Service Charges	Issue Reload Activate	Depending on how they are configured, Sale/Issuance of Cards can be Menu Items or Services charges. Refer to the information provided by the Installer/ Dealer.
Tender/Media	Point Issue Redeem Redeem Auth Offline Tender Manual Tender Cash Out	All these keys imply some sort of payment, issuance, or redemption.
Discount	Accept Coupon	Configuring a coupon as a discount will allow the discounted amount to be deducted from sales. Accept Coupon can be set up as a Tender/Media, however this is not common.

The following items are not necessarily keys. These functions are required in order to allow for certain types of POS level functions

Classification	Function	Description
POS Required	CRM Transaction	Enabling this option will allow functions to be performed from online, like posting transactions and crediting accounts. Without enabling this, no Account Administration will be available.
	Point Balance Balance Inquiry Balance Transfer	Enabling these option ensure that these actions will be available at the POS.
Special Features	Custom Message	This option is designed for very specific instances where a custom message has been created for a program. This feature is only initiated based on the use of another key. This is a Professional Service and is not part of a standard iCare Card Program.

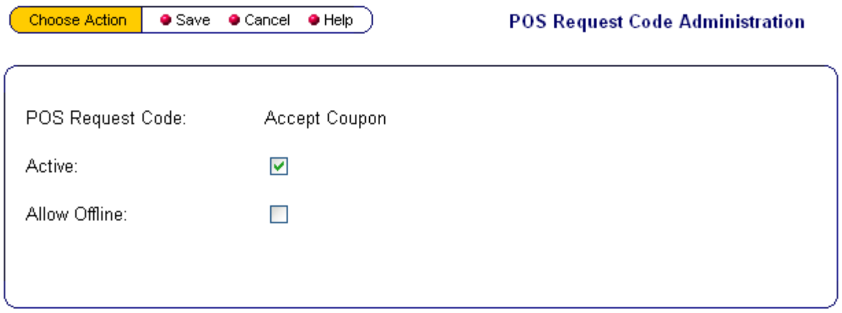
There are three steps to configuring the POS.

1. All POS Request Codes must be activated (required)
2. Key specific information must be entered POS Keys that will be used (required for appropriate keys)
3. POS Print Text can be included (optional)

SCREEN OVERVIEW

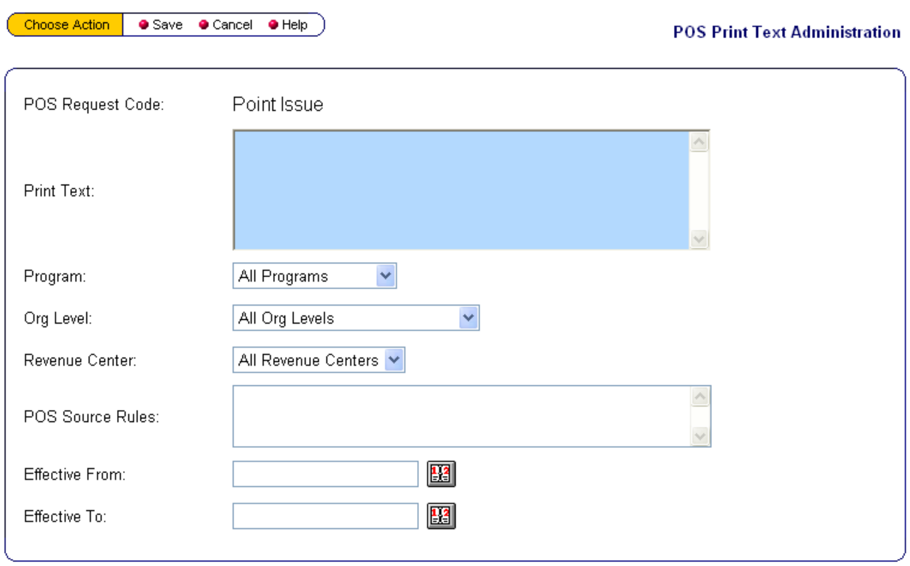
When modifying the fields in the POS Configuration module of iCare Configuration, you will come across three screens. Their details are as follows:

Edit POS Request Code Screen



Field	Description
POS Request Code	Displays the name of the request code you are modifying
Active	Enable this option to make the request code active
Allow Offline	Enable this option if you want to allow the operation to be successful without having the key communicate to the SVC Server

Edit POS Print Text Screen



Field	Description
POS Request Code	Displays the name of the POS Request Code
Print Text	Enter the text to print on the POS roll paper. Must adhere to the proper print format.

Field	Description
Programs	Select the program for which this text prints. You may select a single program, or all programs. If you wish to print different text for different programs, create multiple records.
Org Level	(optional) Select the organization level for which this text prints. You may select a single organization level (e.g., location), or all levels. If you wish to print different text for different locations, create multiple records.
Revenue Center	(optional) Select the revenue center in which this text prints. You may select a single revenue center, or all revenue centers. If you wish to print different text in different revenue centers, create multiple records.
POS Source Rules	This field is reserved for future development
Effective From/To Dates	Enter the start and end dates for which this is active.

iCare POS Printing

The following describes how to format iCare POS print information. Print information is made up of one or more print lines. Each line may contain print directives and/or tokens, and may print up to 32 normal sized characters. Depending on the printer, lines may print in black or red, or normal and inverse print[1].

This feature may be used to format a loyalty club chit, a coupon, or an account balance chit. For example, in a loyalty application it may be used to show a member their balance, how far they are from their next award, and perhaps some other promotional information. The contents may include customer and/or account information. To support this, a set of tokens can be embedded in the text to personalize the content.

Print Text fields can be defined for:

- Coupon Types
- Loyalty Rules
- Print Reference Entry
- POS Keys

Example:

A Print Text field that uses the follow tokens:	may print as...
Dear `@customerName@`, Thank you for visiting today. You have just earned `@points@` `@PointName@` and your balance is now `@pointsBalance@` `@pointsName@`! You need to earn only `@pointsUntilAward@` `@PointName@` before `@pointsExpirationDate>mmddyy@` to earn a complimentary dinner for two.	Dear Mike Rose, Thank you for visiting today. You have just earned 235 chips and your balance is now 9547 chips! You need to earn only 453 chips before July 31, 2005 to earn a complimentary dinner for two.

In addition to print tokens, iCare provides print directives. These entries can be used to format the text on the POS roll printers.

In addition a number of print directives are available to improve the formatting by changing the color or centering the text. For example the line:

```
%C%%RED%%DWON% Congratulations!!!
```

will print centered, double wide, and in red on the chit.

Print Tokens

Print Tokens allow you to embed information about an iCare transaction into the POS print lines. Token names are case sensitive:

`@PointName@` does not equal `@pointname@`

Field	Description
@PointName@	This is the name that the program gives to accrued points. Examples include “Visit(s)”, “Point(s)”, “Chip(s)”.
@ProgramName@	This is the program name, such as “Gold Club”, etc.
@AccountNumber@	This is the account number. It may be as long as 32 alphanumeric characters.

Field	Description
@ObfuscatedAccountNumber@	The account number may be masked so that only the last 4 characters are displayed. (For example, ************1234) Use this token for gift, credit, or payment accounts.
@AccountBalance@	This is the account's current balance.
@ExchangeRate@	This is the current transaction's exchange rate.
@LocalAccountBalance@	This is the local account balance, i.e., the account balance in the restaurant's currency.
@AuthCode@	This is the authorization code.
@PointsBalance@	This is the account balance.
@Points@	This is the number of points issued in this transaction.
@PointsUntilAward@	This is the number of points required to reach the next award level.
@BonusPoints@	This is the number of bonus points issued in this transaction.
The next five print tokens are used when issuing a coupon chit.	
@CouponCode@	This is the coupon code being issued.
@CouponName@	This is the coupon name.
@CouponSerialNumber@	This is the serial number of the coupon being issued.
@CouponValidUntilDate@	This is the coupon's expiration date.
@CouponValue@	This the coupon's value.
@LocationName@	This is the store name.
@PointsStartDate>dd MMM yyyy@	This is the date that point accumulation began. The date format may be configured.
@PointsExpirationDate>dd MMM@	This is the date that points expire.
@ActivationOrIssueDate>MMM@	This is the activation or issue date.
@ValidUntilDate>dd MMM yyyy@	This is the date on which the account becomes invalid.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>@AwardText@</td><td>Award text may be formatted. This token inserts that text into the chit.</td></tr>
<tr><td colspan="2">The following tokens may be used to print specific customer information-- if a customer is associated with an account. In some cases, a customer may not be associated with the account. To support this situation, the @CustomerExists@ token may be used. Text and tokens surrounded by two @CustomerExists@ tokens will print only when a customer record is associated with this account.
For example, the following two lines of text:
@CustomerExists@Dear @CustomerName@,@CustomerExists@
Thank you for visiting!
Will print the following…</td></tr>
<tr><td>…if a customer record is associated</td><td>…if no customer record is associated:</td></tr>
<tr><td>@CustomerExists@</td><td>Conditional token.</td></tr>
<tr><td>@CustomerName@</td><td>This prints the customer’s first and last name, separated by a space.</td></tr>
<tr><td>@CustomerFirstName@</td><td>This prints the customer’s first name</td></tr>
<tr><td>@CustomerLastName@</td><td>This prints the customer’s last name</td></tr>
<tr><td>@CustomerEmailAddress@</td><td>This prints the customer’s email address</td></tr>
<tr><td>@CustomerHomePhoneNumber@</td><td>This prints the customer’s home phone number</td></tr>
<tr><td>@CustomerPostalCode@</td><td>This prints the customer’s postal code</td></tr>
<tr><td>@CustomerFriendlyProgramName@</td><td>This prints the program name that the customer will see.</td></tr>
<tr><td>@CustomerPOSTextMessage@</td><td>This prints a message created by custom software.</td></tr>
</table>

Date Tokens include an embedded date format following the ‘>’:

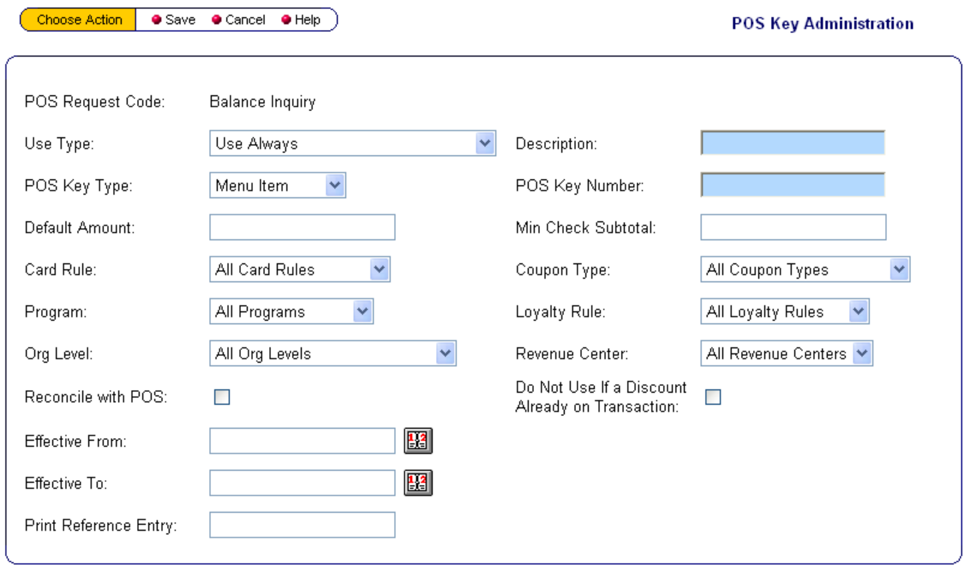
Abbr.	Field	Format
y	Year	yyyy = 2005 yy = 05
M	Month	MMMM = September MMM = Sep MM = 09
w	Week in year	27
W	Week in month	2

Abbr.	Field	Format
D	Day in year	189
d	Day in month	10
F	Day of week in month	2
E	Day in week	EEEE = Tuesday EEE = Tue
a	am/pm marker	AM, PM
H	Hour in day (0-23)	0
k	Hour in day (1-24)	24
K	Hour in am/pm (0-11)	0
h	Hour in am/pm (1-12)	12
m	minute	30
s	second	55

Examples:

@PointsStartDate>MMMM d, yyyy@	September 25, 2005
@PointsStartDate> d MMM, ‘yy@	25 Sep, ‘05
@PointsStartDate>MMMM d, yyyy, at h:mm a@	September 25, 2005, at 9:30 AM
@PointsStartDate>Fnd EEE in MMMM@	2nd Tuesday in September

Edit POS Key Screen



<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td>POS Request Code Name</td><td colspan="2">Displays the name of the POS Request Code being modified</td></tr>
<tr><td rowspan="5">Use Type</td><td colspan="2">Select the terms under which this POS key is used</td></tr>
<tr><td>Select...</td><td>to use this key...</td></tr>
<tr><td>Always</td><td>at any time</td></tr>
<tr><td>Use only when account is opened</td><td>when the account is initial opened</td></tr>
<tr><td>Off-line</td><td>when the POS is out of communication with the host</td></tr>
<tr><td>Description</td><td colspan="2">This 200-character field can be used to enter comments, details, or notes for administrators who maintain this POS key</td></tr>
<tr><td>POS Key Type</td><td colspan="2">Select the type of POS key: menu item, discount, service charge, or tender.</td></tr>
<tr><td>POS Key Number</td><td colspan="2">Enter the key’s key number from the POS database.</td></tr>
<tr><td>Default Amount</td><td colspan="2">This field is intended for use with a discount key. Enter a default amount for this discount.</td></tr>
</table>

Field	Description
Min Check Subtotal	Enter the minimum subtotal that a transaction must reach in order to qualify for a discount. This is intended to prevent a situation in which a $2.00 discount is applied to a transaction totaling only $1.00
Card Rule	(optional) Select the card rule that applies to this key. You may select a single card rule, or all card rules. If you wish to apply different card rules to different keys, create multiple records.
Coupon Type	(optional) Select the coupon type that applies to this key. If you wish to apply different coupon types to different keys, create multiple records.
Program	Select the program that applies to this key. You may select a single program or all programs. If you wish to apply different programs to different keys, create multiple records.
Loyalty Rule	(optional) Select the loyalty rules used with this key. You may select a single loyalty or all revenue centers. If you wish to use different keys in different loyalty rules, create multiple records.
Org Level	(optional) Select the organization level at which this key is used. You may select a single organization level (e.g., location) or all levels. If you wish to apply different keys to different locations, create multiple records.
Revenue Center	(optional) Select the revenue center where this key is used. You may select a single revenue center or all revenue centers. If you wish to use different keys in different revenue centers, create multiple records.
Reconcile with POS	Select this option to include the POS key number in the transaction record that is recorded by the host. This option is intended for reporting purposes. For example the organization may wish to compare the number of cards issued as recorded by the POS with the number of cards issued as recorded in the host database

Field	Description
Do Not Use if a Discount Already on Transaction	Select this option to include the POS key number in the transaction record that is recorded by the host. This option is intended for reporting purposes. For example the organization may wish to compare the number of cards issued as recorded by the POS with the number of cards issued as recorded in the host database
Effective From/To Dates	Enter the start and end dates for which this is active.
Print Reference Entry	In a MICROS POS system, a Reference Entry is an alphanumeric string of up to 19 characters that can be appended to any transaction detail item, such as menu items, discounts, service charges, or tenders. Reference entries print and display with the item entered. Reference entries print on guest checks, customer receipts, remote printers, and journal printers, and are recorded in the transaction detail. Enter up to 19 characters to print as a reference entry for this key.

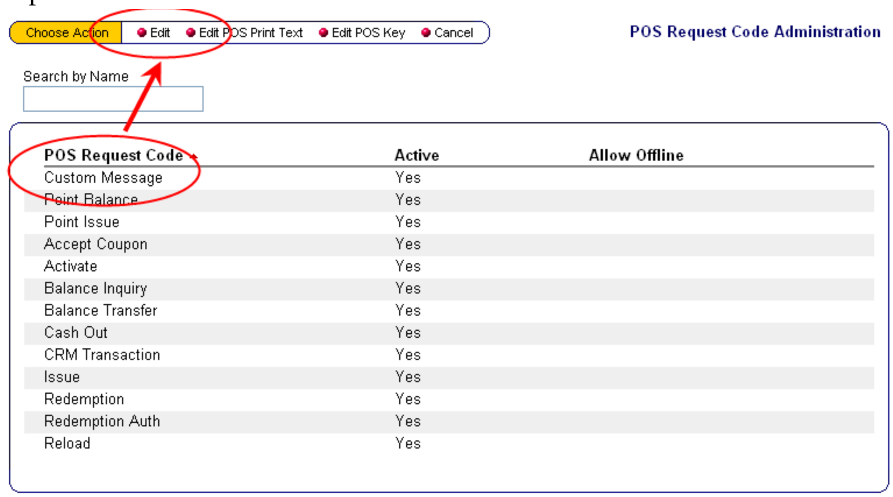
Activate the POS Request Codes

It is recommended that all POS Request Codes be activated. Yes, it is true that not all programs will use every POS Request Code offered, but it is suggested that, while in the configuration process, all the codes should be set up. This is also in part to the fact that some of the codes, although might not have a POS Key function, have other functions, such as allowing online administration of accounts.

Activate a POS Request Code

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | POS Configuration

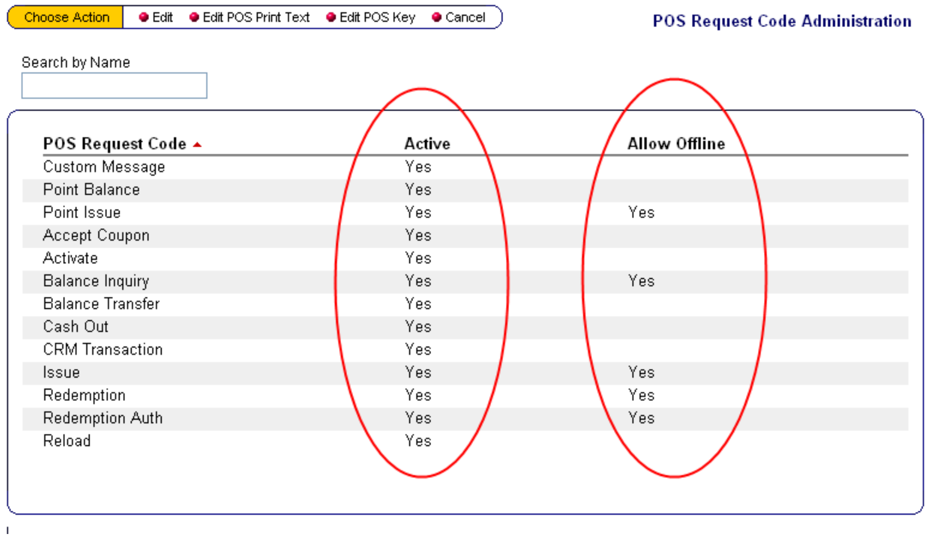
2. Select the first POS Request Code, Custom Message, and click Edit from the top menu bar:



3. Enable the Active option bit

4. Enable the Allow Offline option bit (optional)
5. Save
6. Repeat steps 2 - 5 for all remaining POS Request Codes

All activated POS Request Keys will have a 'Yes' in the Active column. Keys with Allow Offline enabled will also have a 'Yes' below the Allow Offline column:

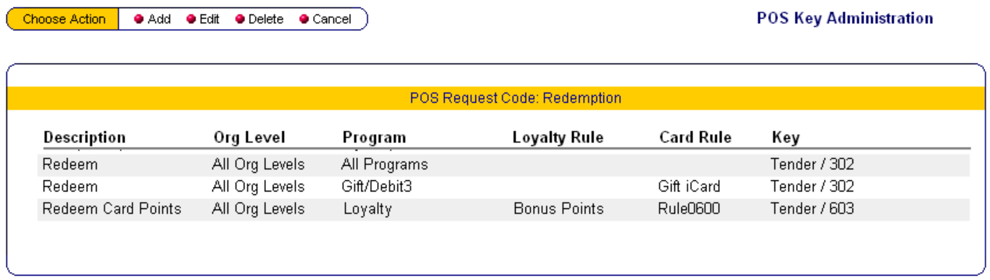


SITE-SPECIFIC KEY CONFIGURATION AND PRINT TEXT

iCare allows you to create multiple instances of POS Keys as well as multiple instances of Print Text. This becomes especially useful when an organization has multiple revenue centers or is an international organization that wants to consider more than just the US English default. For example, the table below shows an organization with multiple revenue centers and multiple locations world wide, and includes how iCare addresses this issue:

Key	Org Level	Revenue Center	Print Text
Reload	Illinois	Fine Dining	Thank you!
Reload	Illinois	Japanese Cuisine	Domo arigato goziamasu!
Reload	Quebec	Bistro	Mercí!
Reload	Acapulco	Cafe	¡Gracias!

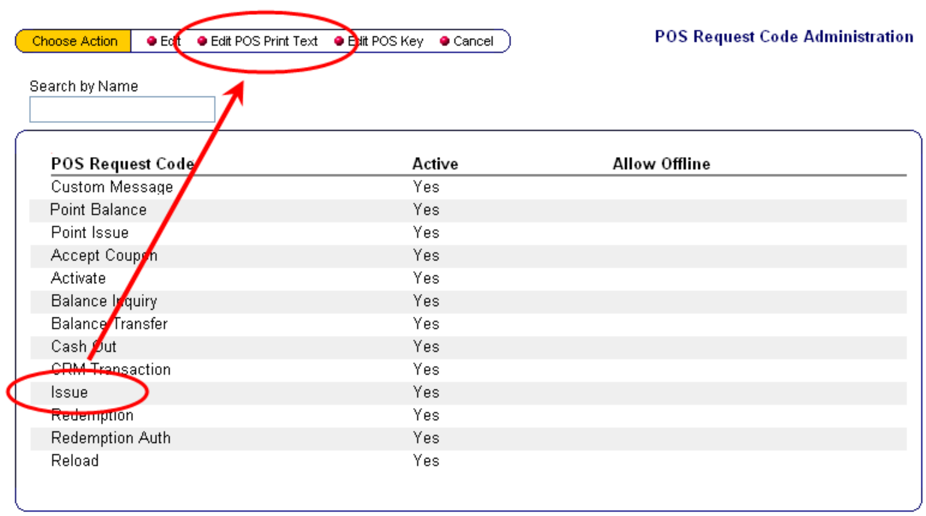
The example above shows one organization that uses four different Reload keys. The organization has two revenue centers in Illinois, one using English and the other using Japanese. The location in Quebec, Canada uses French and the location in Acapulco, Mexico uses Spanish. All four of the keys will behave exactly the same way, but can be customized to suit the needs of an international market. For example:



Description	Org Level	Program	Loyalty Rule	Card Rule	Key
Redeem	All Org Levels	All Programs			Tender / 302
Redeem	All Org Levels	Gift/Debit3		Gift iCard	Tender / 302
Redeem Card Points	All Org Levels	Loyalty	Bonus Points	Rule0600	Tender / 603

Edit the POS Print Text

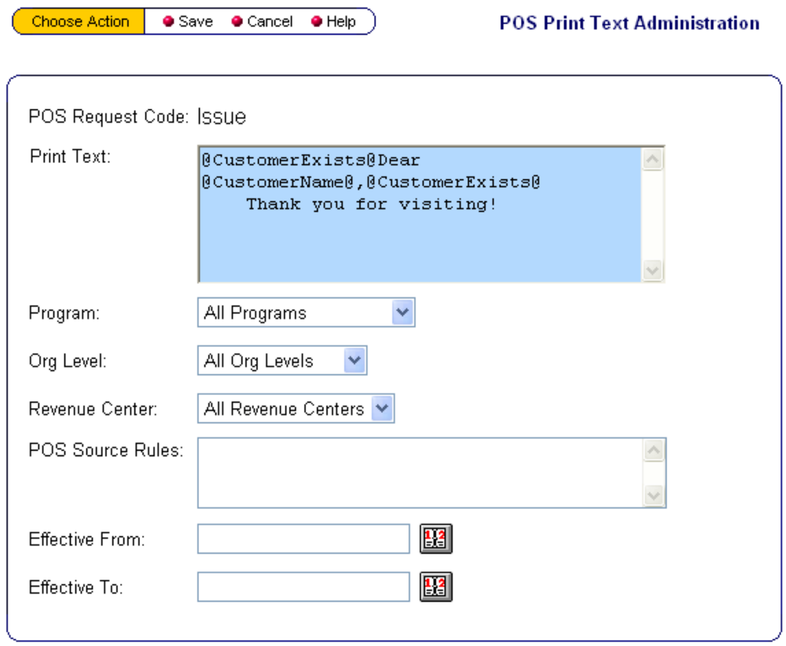
1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | POS Configuration
2. Select a POS Request Code and click Edit POS Print Text from the top menu bar



POS Request Code	Active	Allow Offline
Custom Message	Yes	
Point Balance	Yes	
Point Issue	Yes	
Accept Coupon	Yes	
Activate	Yes	
Balance Inquiry	Yes	
Balance Transfer	Yes	
Cash Out	Yes	
CRM Transaction	Yes	
Issue	Yes	
Redemption	Yes	
Redemption Auth	Yes	
Reload	Yes	

3. Select Add from the top menu bar to create a new Print Text record

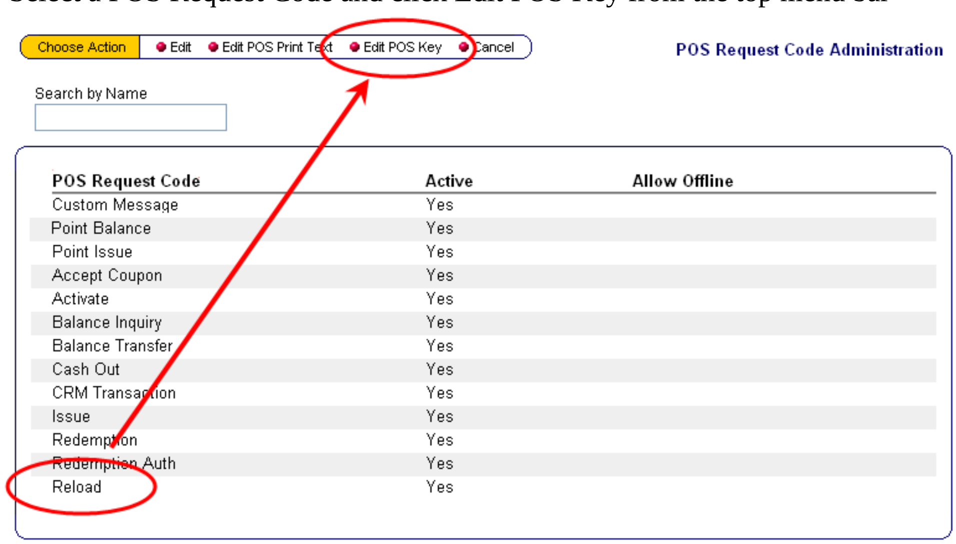
4. Enter the Print Text to be printed out at the POS - keep in mind the necessary Print Tokens that must be used



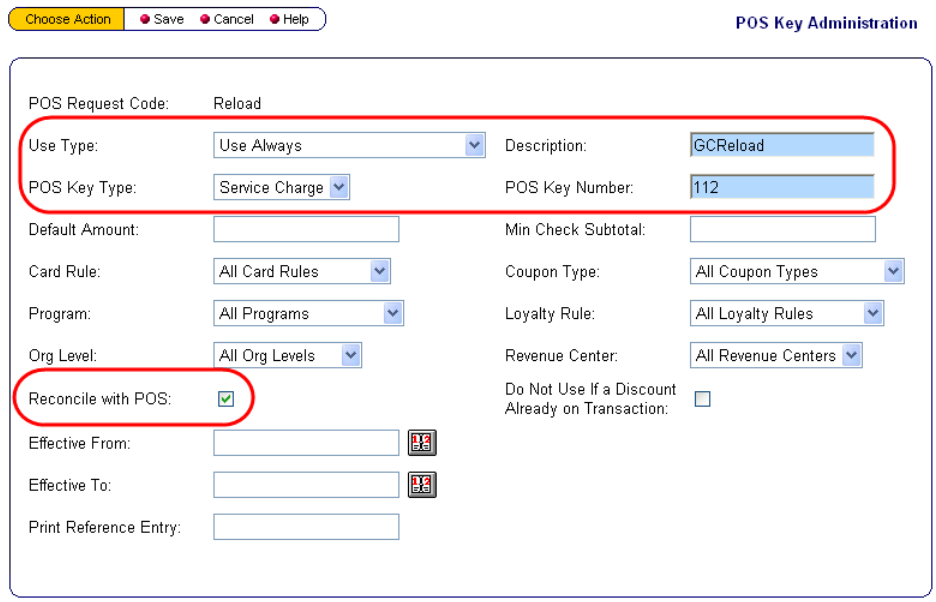
5. All other fields are optional
6. Save

Edit the POS Key

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | POS Configuration
2. Select a POS Request Code and click Edit POS Key from the top menu bar

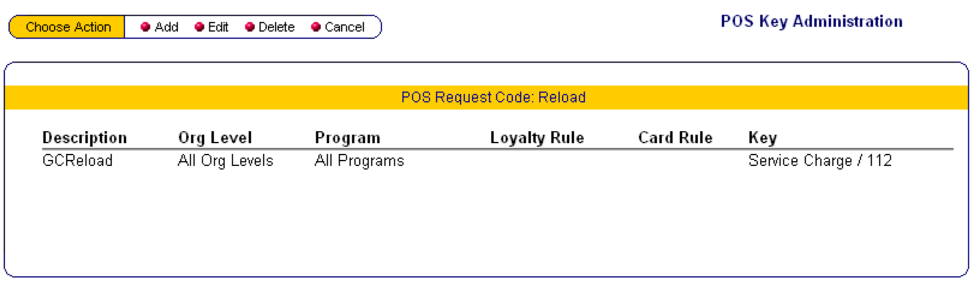


3. Click Add from the top menu bar
4. Modify the fields according to customer specifications - be sure to enable the Reconcile with POS option bit



5. Save

The newly modified POS Key record will be added to that key's overview page:



Currency

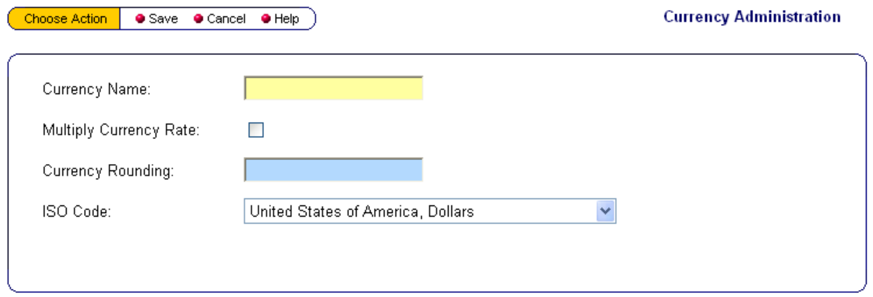
When the mymicros.net or iCare account was created for your organization, a base currency was assigned. This menu allows you to configure other currencies that may be used by iCare, as well as their exchange rates.

WORKING WITH CURRENCIES AND EXCHANGE RATES

Add/Edit a Currency

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Currency | Add

2. Modify the fields according to the description below:

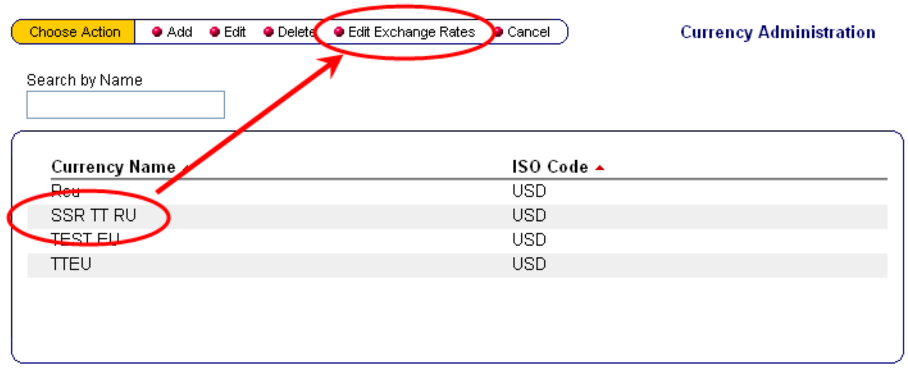


Field	**Description**	
Currency	Enter the currency name to be used in iCare applications	
Multiple Currency Rate	This checkbox defines whether to multiply or divide by the Exchange Rate, depending on how the rate is expressed: as a fraction of the base currency, or as a multiple of the base currency.	
exchange rate expressed as	Local currency per foreign currency	Foreign currency per local currency
examples	If the US dollar is the base currency: 1 YEN = .009514 USD 1 GPB = 1.79960 USD	If the US dollar is the base currency: 1 USD = 109.29 YEN 1 USD = .55583 GBP
settings	Check this box to multiply by the rate	Check this box to divide by the rate
Currency Rounding	If this currency must be rounded to be expressed in the base currency, enter a number for the rounding level. For example, if US currency is used, enter: ◆ .05 to round to the nearest nickel, ◆ .10 to round to the nearest dime, or ◆ 1 to round to the nearest dollar.	
ISO Code	Use the drop-down list to specify the country currency you will be using.	

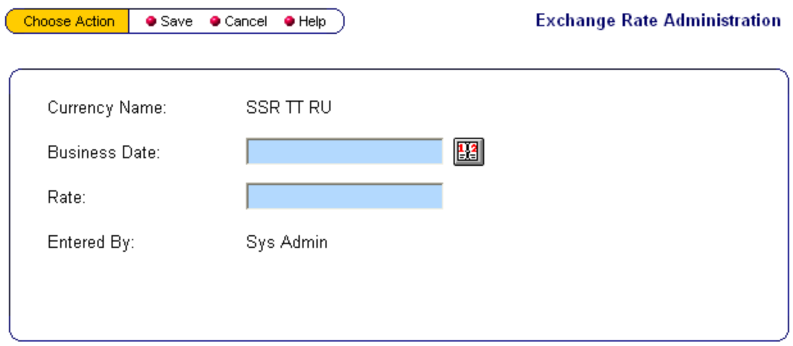
Add/Edit an Exchange Rates

1. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Currency

2. Select an existing currency and click Edit Exchange Rates | Add



3. Enter/Modify the exchange rate:



Note	*Exchange Rates can be found in major metropolitan newspapers or on the Internet.*

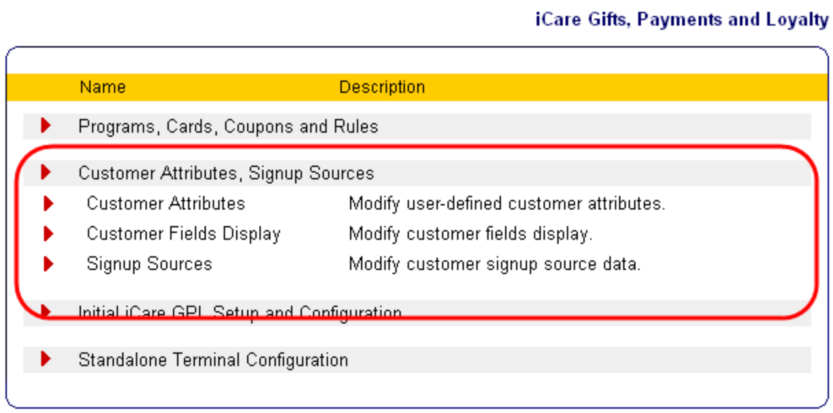
4. Save

Customer Attributes, Signup Sources

Customer Attributes and Sign up sources allow you to collect and track additional data customized for your version of iCare and your individual needs.

Customer attributes refers to data about each customer such as the given cases of Name, Address, Phone number etc. This module allows you to create custom fields to enhance the data collected and stored here. Sign up sources is another metric to track customer activity. A sign up source s the promotion or program under which a customer entered the iCare system.

To access and customized these items, from the iCare Admin menus, select GPL Config, and then Customer Attributes, Signup Sources appears as below:

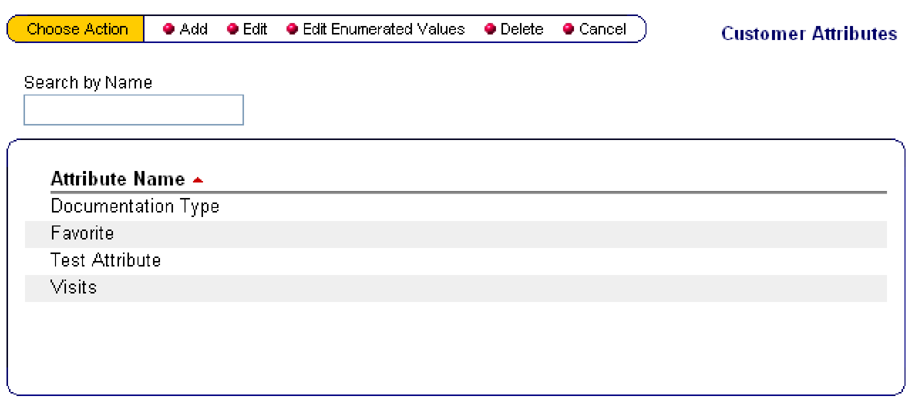


Customer Attributes

Customer attributes are the specific fields that define the customer information when it is viewed through the Account Admin module. You create custom fields and custom selections for these fields to complement or supplement the standard customer attributes that appear in the Account Admin module. To create these customer defined fields, you must open the Customer Attributes page and create the new the customer attributes. Once you have created the Attribute you want to have displayed on the Customer attributes page, you need to open the Customer Fields Display Page to select the Attribute to be displayed and assign it a position from the pop-up menu.

Your system administrator will still need to add a row to a database table behind the scenes of the user interface, but the interface will now support the display of these custom defined attributes.

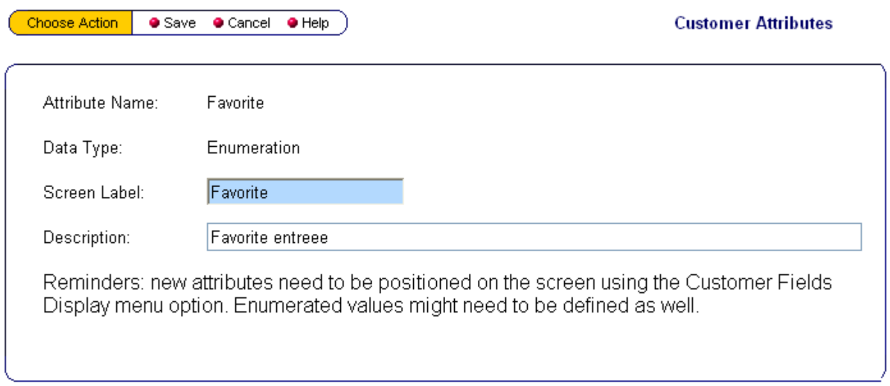
This is the main Customer Attributes page:



Configuring Customer Attributes

Add/Edit a Customer Attribute

1. Navigate to iCare Admin | iCare Config | Customer Attributes, Signup Sources | Customer Attributes
2. Select Add (or select an existing attribute and click Edit)
3. Enter/Modify the fields according to the description in the table below:



Field	Description
Attribute Name	Enter a name for the attribute **this is a display field if editing an attribute**
Data Type	From the drop down menu, select a data type for the information you want to appear in the field. This helps the system format and track the data. Date, Decimal, Numeric, Text, and True/False are all self explanatory. For more information about Enumerated (Enumeration) fields and what this means, see the following section. **this is a display field if editing an attribute**
Screen Label	Enter the name the way you want to field to appear on screen
Description	Enter a description for the field. It is important be as descriptive as possible when entering a description so you know why the field is there and exactly what it is to be used for.

4. Save

The system saves the attribute you have just created. You must now assign a screen position to the attribute using the Customer Fields Display Page.

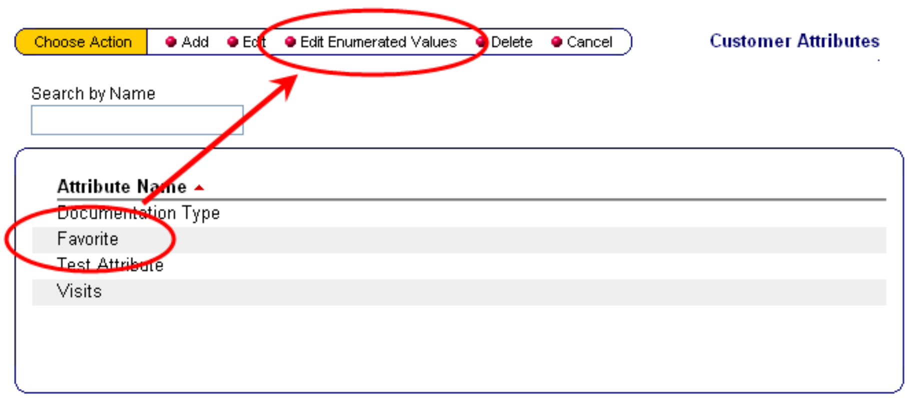
Enumerated Values

Enumerated Values are selectable values that appear in the drop-down menus next to customer fields. The key word is selectable. There are definitive options presented that you must pre-configure and those options are the user's only options when entering information into a field. These values make it easier and faster to enter information for a specific attribute. It can also be used to limit what appears in certain fields.

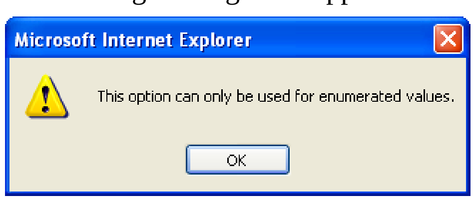
For example, instead of using a free text field to for a Favorite Entree custom customer attribute, you could limit the selection to Steak, Fish or Vegetable. This way not all the variations of these could be entered (as in a free text field) allowing you to more accurately track favorite entree information. To create enumerated value entries, select "Enumeration" as the data-type when creating a new Customer Attribute.

Edit Enumerated Fields

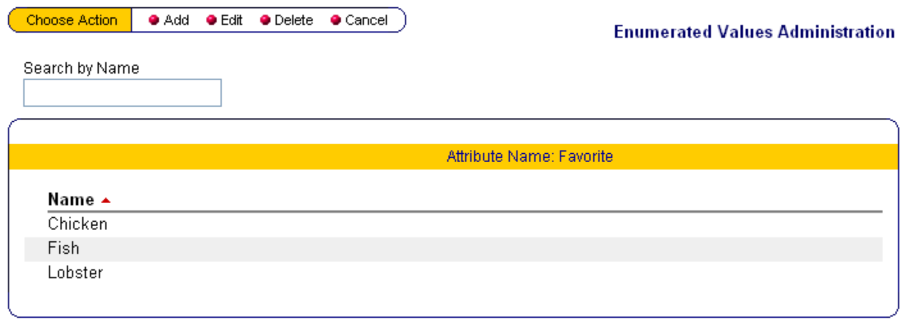
1. Select a customer attribute where Enumeration is the specified Data Type and click Edit Enumerated Values



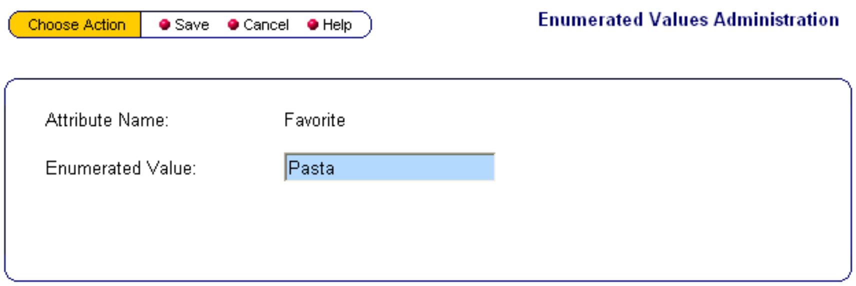
If the customer attribute does not have enumeration specified as the data type, the following message will appear:



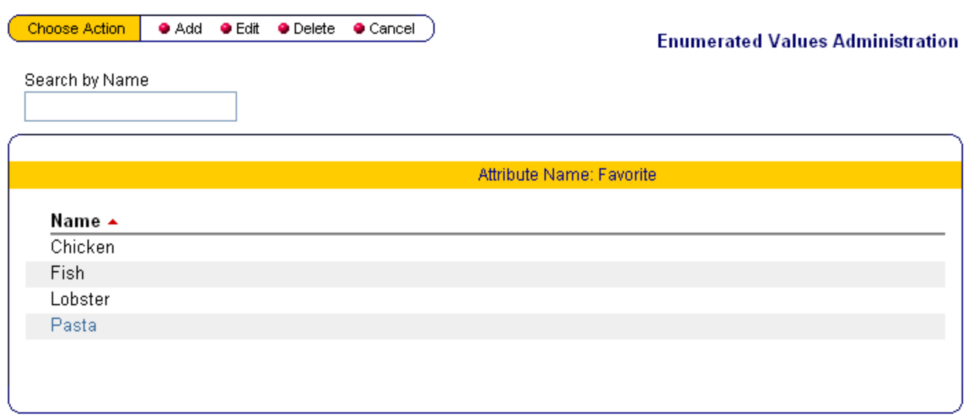
2. Once you have selected an attribute name, click the Edit Enumerated Values button from the top menu bar. The enumerated field entries for this attribute in appear in a page as follows:



3. Click Add from the top menu bar
4. Enter the Enumerated Value and click Save from the top menu bar:



The newly created enumerated value will appear on the overview page with any existing enumerated values:

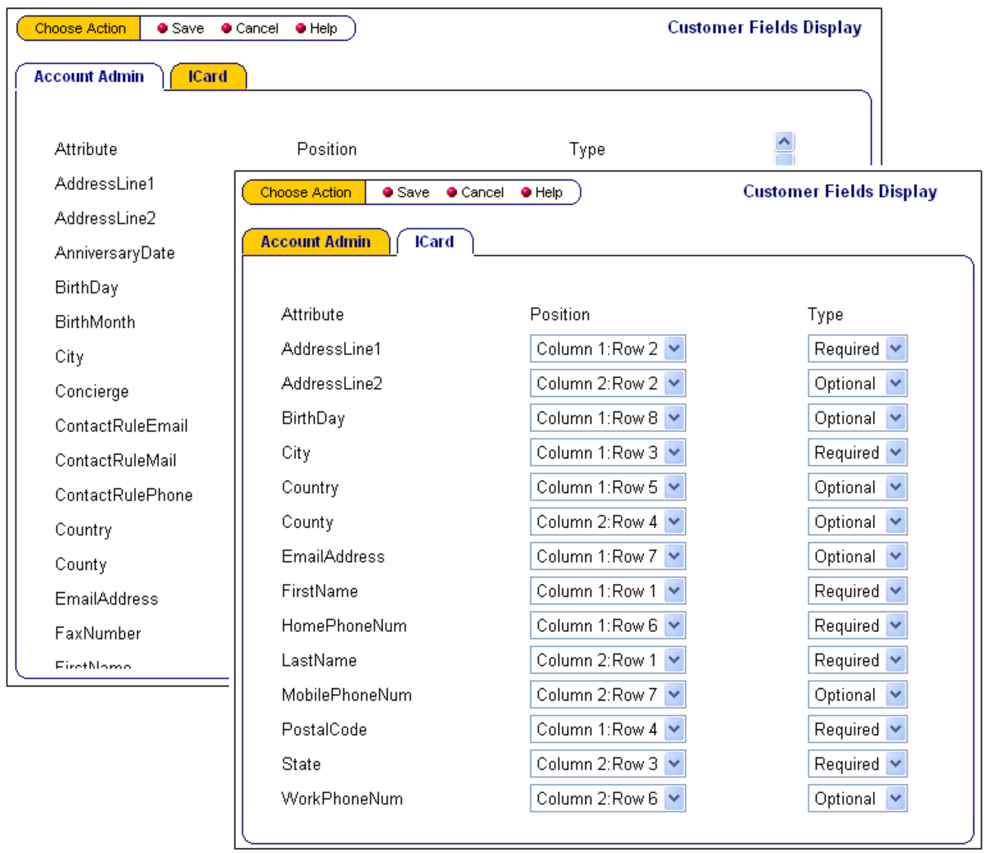


To apply these newly created attributes, please refer to [Customer Fields Display].

Customer Fields Display

Once you have created the custom fields you would like to add, you must tell the iCare user interface where you want these fields to appear in the iCare Account Admin pages. Remember, the Account Administration pages are where users will be enter customer information. Account Administration fields will be edited on the Account Admin tab.

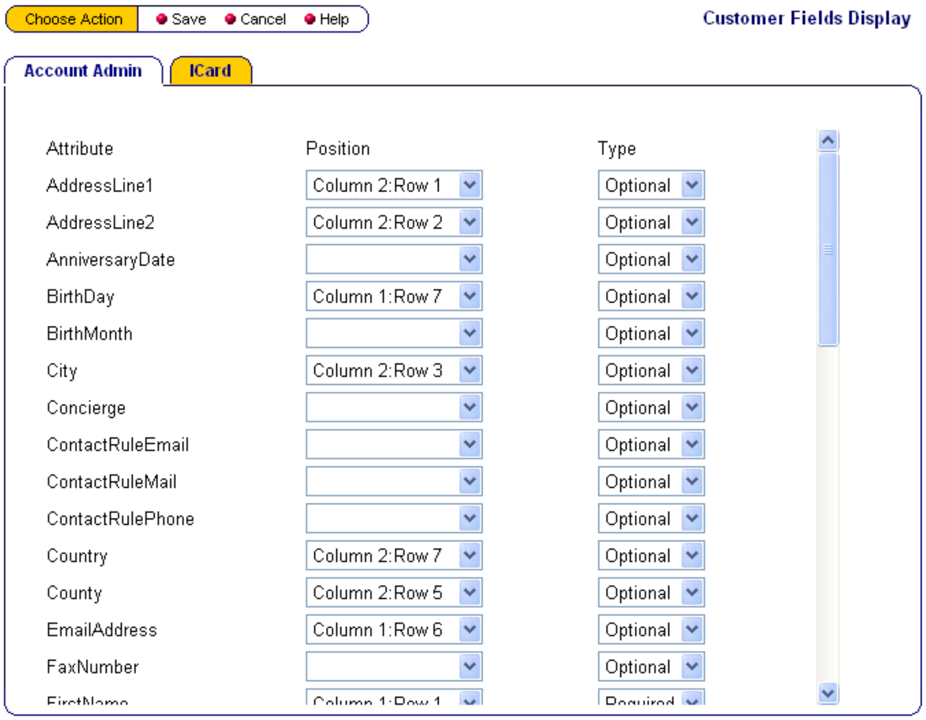
Also, you will be able to determine where within the myiCard.net website fields will be placed. This functionality is available since not all organizations need or want the same type of information gathered from the myiCard.net website. However, from myiCard.net, First Name and Last Name are not editable. myiCard.net fields will be edited on the iCard tab.



Modify Customer Fields

1. Navigate to iCare Admin | iCare Config | Customer Attributes, Signup Sources | Customer Fields Display

You will see three columns: Attribute, Position, and Type:



2. For each attribute:
   - Position - Identify where the element will appear on screen
   - Type - Optional vs. Required
3. Save

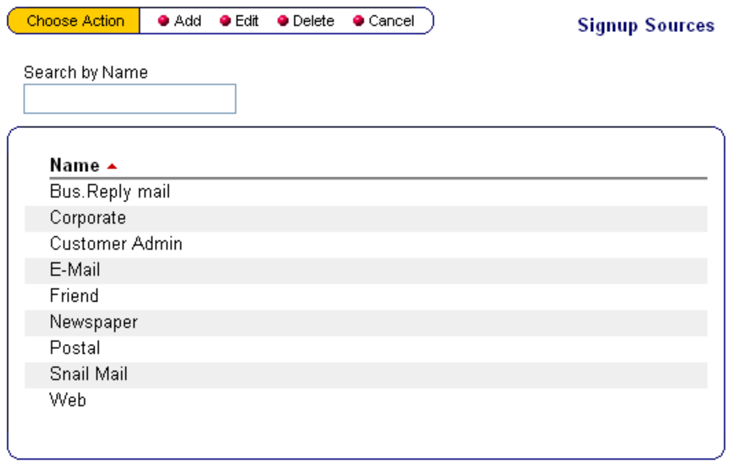
Signup Sources

Sign up sources are a method of identifying where customers are most frequently enrolling for loyalty and customer rewards programs. The signup sources module is rarely used since a majority of customers enroll in store and then may choose to update their information via the myiCard.net website. However, MICROS has recently begun accepting online registration by receiving customer information from a 3rd party provider.

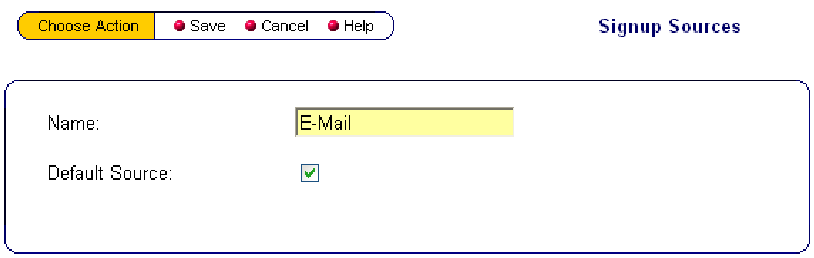
Working with Signup Sources

Add Signup Sources

1. Navigate to iCare Admin | iCare Config | Customer Attributes, Signup Sources



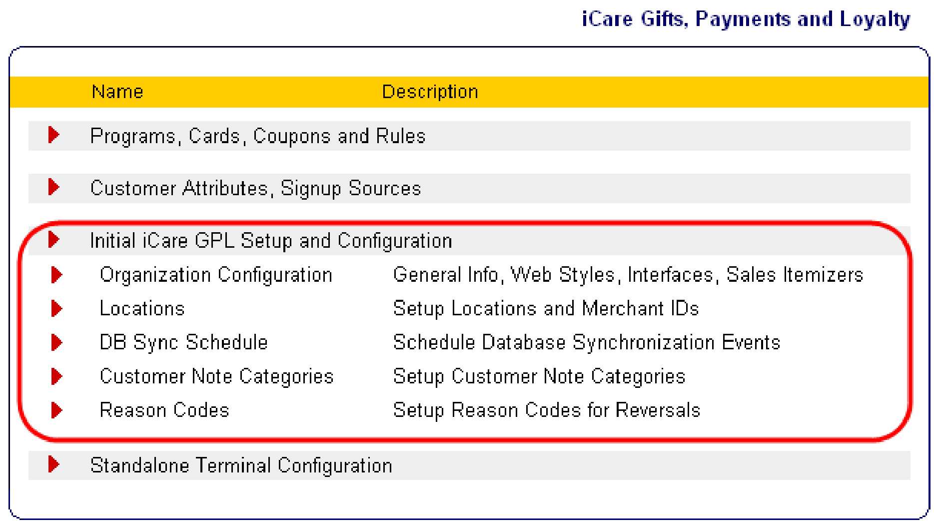
2. Click Add from the top menu bar
3. Modify the name of the Signup Source and enable the Default Source option bit (if necessary)



4. Save

Initial iCare GPL Setup and Configuration

The following sections describes the Initial iCare GPL Setup and Configuration. This area is generally only accessed and modified during implementation for one-time configuration. For most System Administrators, the only feature that will ever need to be manipulated here is the Database Synchronization Schedule.



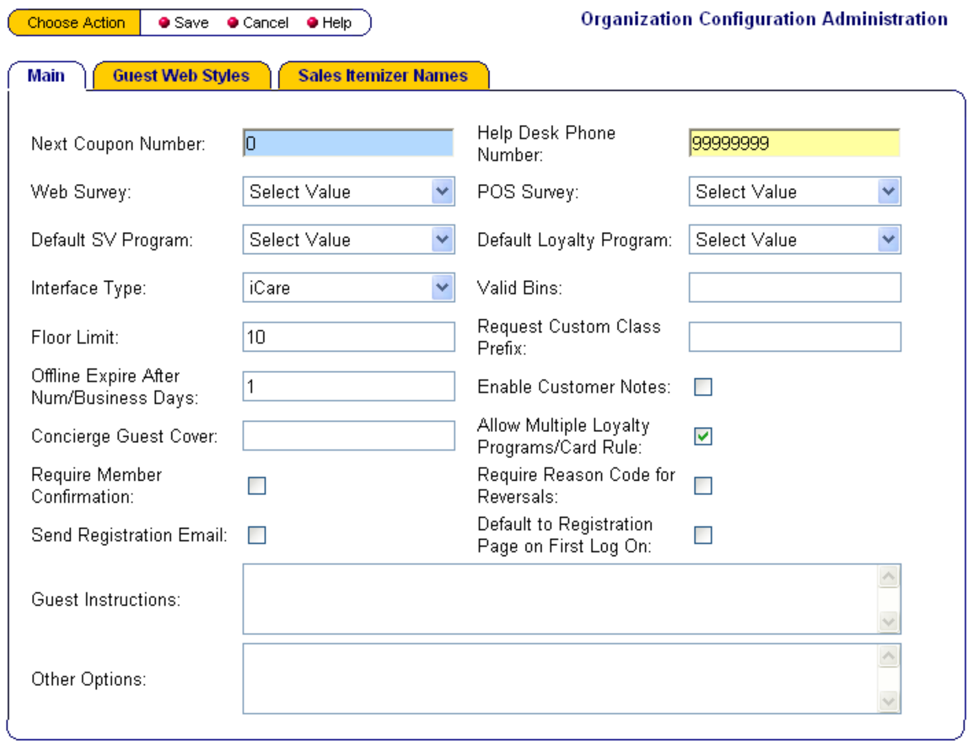
Organization Configuration

An organization is a way to define an “entity” or a group of restaurants, sites etc. at a level higher than the restaurant, but may not necessarily encompass all of a company. The organization is the core business unit for setting GPL sites up. There are certain required fields that appear in blue, and other fields that you may choose to fill out if you want to use the option to define your organizations.

Note	*It is very rare that an organization will have to modify any of the information in this section. Typically, this information is established initially by the myMicros Implementation Group.*

Screen Overview

Main Tab



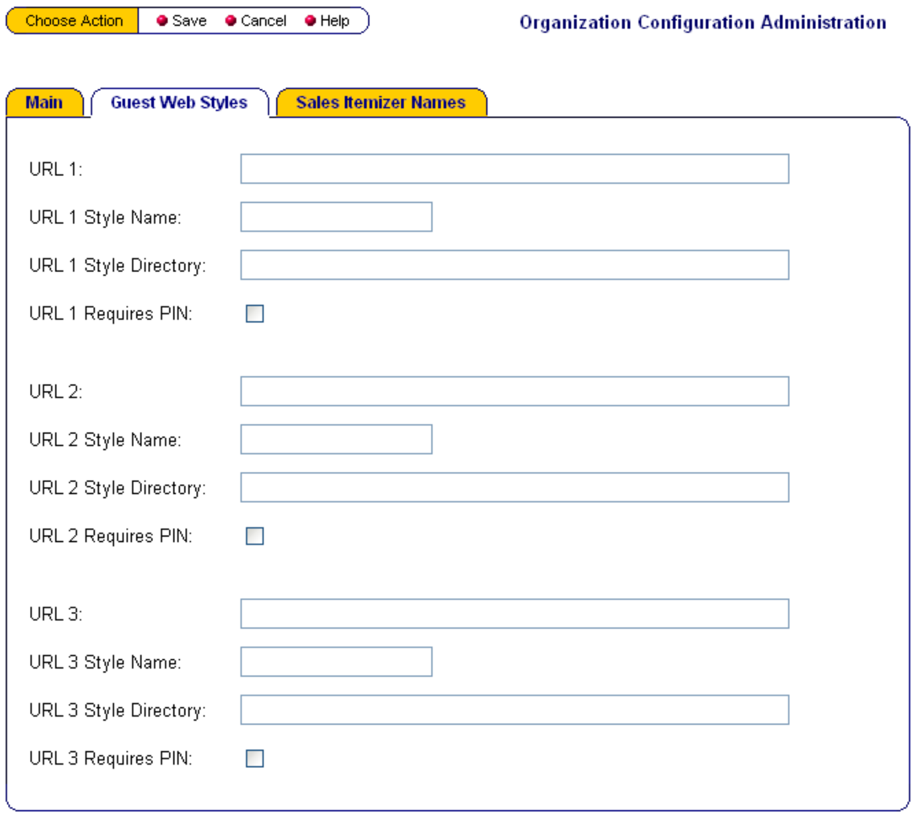
Field	Description
Next Coupon Number	Enter the next coupon sequence number to be used for this organization. This reserves these numbers for he set of coupons for this organization. This is a required field.
Help Desk Phone Number	Enter the phone number for your organization’s help desk. This number can be displayed on the myicard.net web site that this organization uses.
Web Survey	This field is reserved for future development
POS Survey	This field is reserved for future development
Default SV Program	Your organization may run several Stored Value (SV) programs at the same time. This is where the Default Loyalty Program is determined. A stored value program is a set of rules applied to a card to define its limitations.

Field	Description
Default Loyalty Program	Your organization may run several Loyalty programs at the same time. This is where the Default Loyalty Program is determined. This is the program that will appear as the default in the pop-up menu when creating new accounts for this organization.
Interface Type	Select the interface type that is used. This may be iCare (the default), or it may be any of several third-party interface types
Floor Limit	Enter a floor limit amount to determine the amount for which an offline transaction can be redeemed. In the event of a network outage or communication problem, gift cards will still be redeemed since the system will accept an amount below the floor limit. This speeds transaction processing, while minimizing risk.
Offline Expire After Num/Business Days	This field applies when the offline mode is used for the POS. Enter the number of business days after which the contents of the offline buffer in the POS should expire.
Concierge Guest Cover	Enter an amount by which a guest will be assumed "good for" for the Concierge program - organization specific option
Require Member Confirmation	Enable this option if customers will be required to confirm their membership via email *Campaigning Function*
Send Registration Email	Enable this option if the a Registration Email will be send to customers who have activated their loyalty accounts online *Campaigning Function*
Valid Bins	This field may be required to support 3rd-party interfaces.
Request Custom Class Prefix	This field may be required to support 3rd-party interfaces.
Enable Customer Note	Enabling this feature allows for notes to be made regarding accounts on the Account Administration module.
Allow Multiple Loyalty Programs/ Card Rule	Enable this option if more than one loyalty program will be sharing the same card rule

Field	Description
Require Reason Code for Reversals	Enable this option if, when a GPL reversal transaction is performed within Account Admin, a Reason Code will be required
Default Registration Page on First Log On	Enable this option if, when an account holder first accesses the myiCard.net website, he/she will see a default page that requires profile registration before advancing to the account information screens NOTE: Organizations who wish to customize the default pages will be able to do so by updating 3 HTML files: ◆ profileHeader.html ◆ confirmUpdateProfileMessage.html ◆ confirmNewRegistrationMessage.html For more details, please contact the Professional Services Department.
Guest Instructions	This field is reserved for future development
Other Options	Enter an value/code in this field (rarely used)

Guest Web Styles

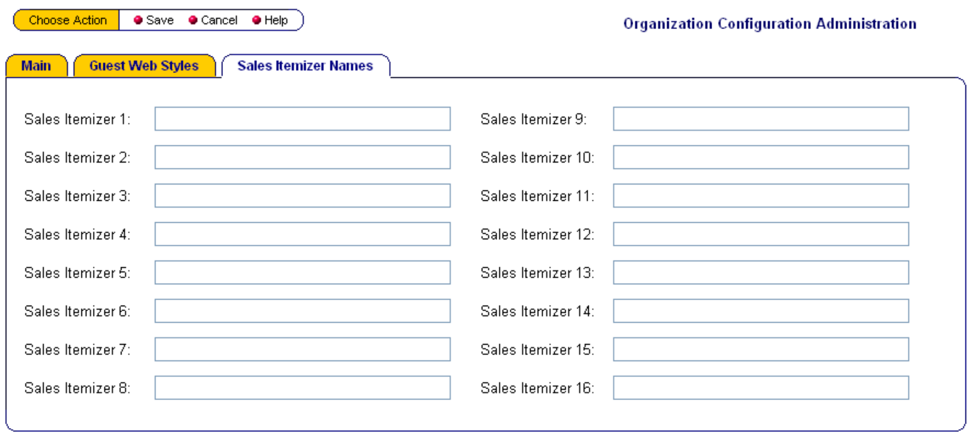
Guest web styles allow the user to customize the appearance of the site based on templates posted in one location and referenced in the Guest Web styles tab. This tab is used by Professional Services to create up to three sets of custom skins, style sheets, graphics, etc., to customize the site. You must create these HTML files and store them in a location that can be referenced via http. You can also use this tab to create one or more unique URL(s) for connecting to the myiCard web site.



Field	Description
URL	You may enter up three URLs that will redirect the user to www.myiCard.net
URL Style Name	For each URL, enter a name of the style that is used by that URL when a user signs in
URL Style Dictionary	For each URL, enter the directory path on the server where the style resides.
URL Requires PIN	For each URL, select if the URL requires a PIN. When the server attempts to access this URL, you will be prompted to enter the PIN.

SALES IMTEMIZER NAMES

Sales Itemizers are items that appear in your POS system and can have an association with a specific organization. To create some of those connections, click the Sales Itemizer Names tab. The Sales Itemizer tab appears:



For each Sales Itemizer entry, up to 16 sales itemizer names from the POS can be referenced by specific gift, payment, or loyalty programs in the organization.

EDITING THE ORG CONFIG FIELDS

1. Navigate to iCare Admin | iCare Config | Initial iCare GPL Setup and Configuration | Organization Configuration
2. Modify the fields on the Main Tab
3. Modify field on the Guest Web Styles and Sales Itemizer Names Tabs (optional)
4. Save

Locations (3rd Part Merchant IDs)

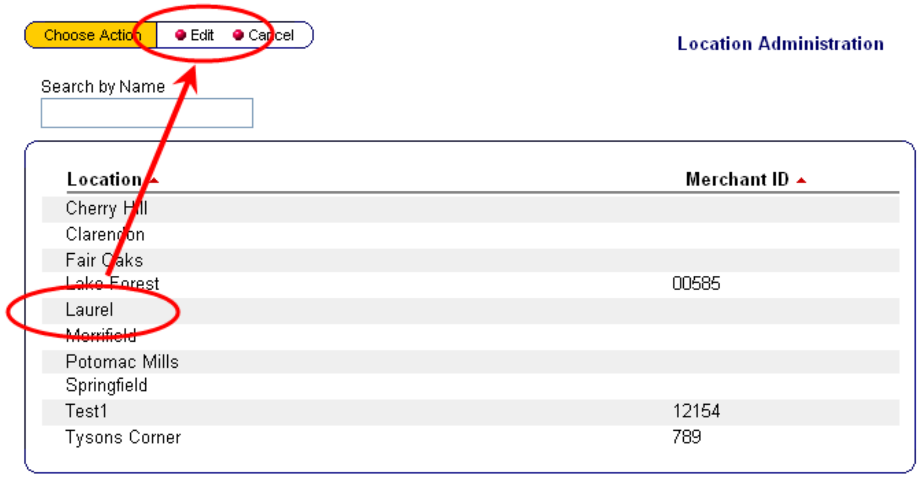
Locations are actual physical organizations associated with the Organization being set up. The Location fields appear throughout the iCare interface. This feature displays existing Location names and their Location references within the organization. Location information is configured for your organization in Admin | Portal |Organization Structure | Locations and are synched from my myMicros Interface. Third-party service providers may require a merchant ID to be assigned to each location in an organization. This menu allows you to assign these merchant IDs.

Note	*It is very rare that an organization will have to modify any of the information in this section. Typically, this information is established initially by the myMicros Implementation Group.*

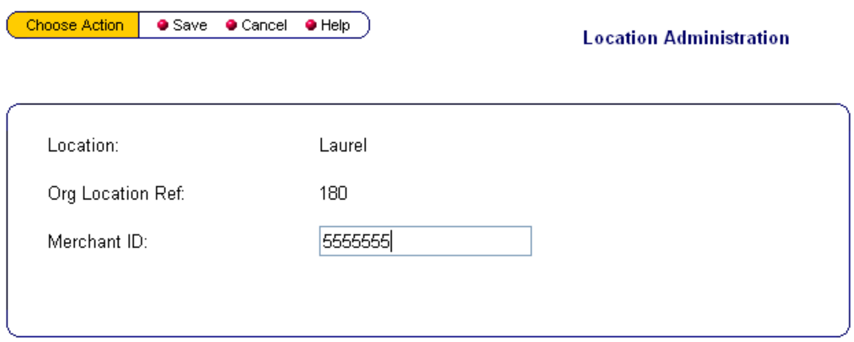
Working with Merchant IDs

Add a Merchant ID for a Location

1. Navigate to iCare Admin | iCare Config | Initial iCare GPL Setup and Configuration | Locations
2. Select a Location and click Edit from the top menu bar:

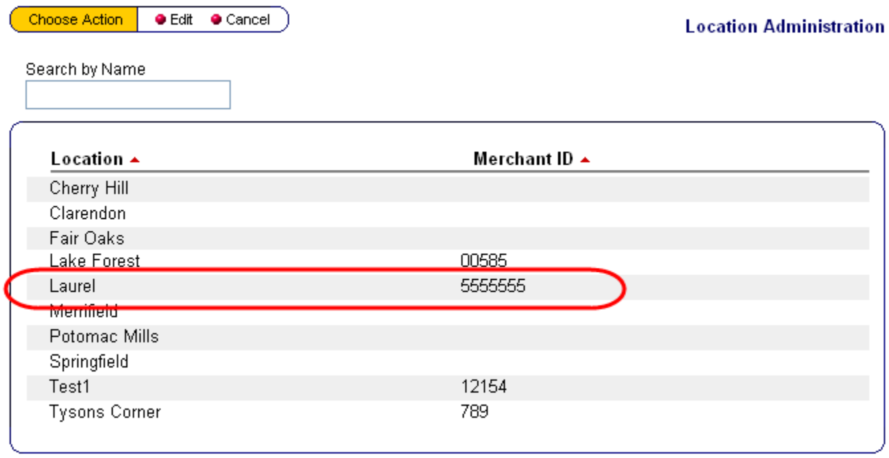


3. Enter the appropriate Merchant ID number in the provided fields



4. Save

The newly added Merchant ID will appear on the overview page:



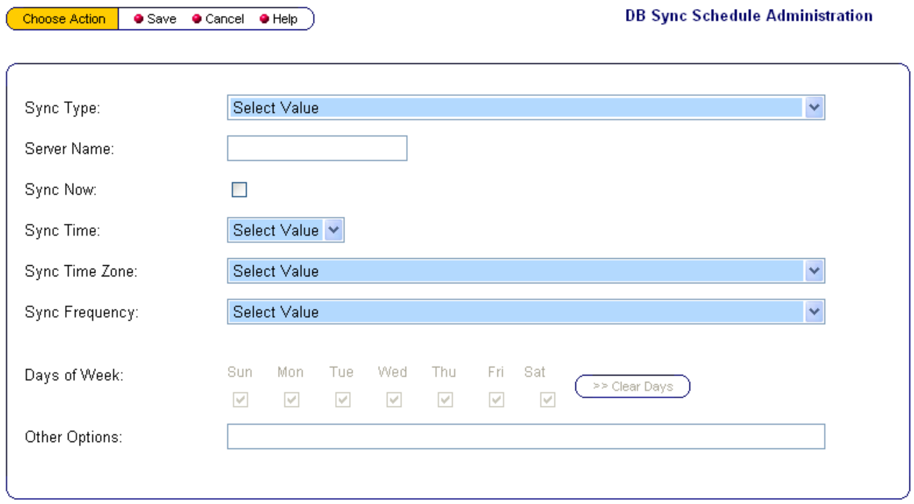
DB Sync Schedule

The Database Synchronization (DB Sync) Schedule menu allows you to schedule Synchronization tasks that transfer all of the transactions and updates to the data from the mymicros.net data warehouse to the iCare On Line Transaction Processing (OLTP) database.

Note — *It is very rare that an organization will have to modify any of the information in this section. Typically, this information is established initially by the myMicros Implementation Group.*

Screen Overview

The following describes the options and fields located on the DB Sync Schedule screen:



Field	Description
Sync Type	This field describe what type of information is being synched to which MICROS database **please refer to the table below for an overview of Sync Types**
Server Name	Enter the name of the server that will be used for all syncs from this organization.
Sync Now	Select this checkbox and click Save in order to force an immediate sync.
Sync Time	Select the time of day that the Sync should take place.
Sync Time Zone	Select the time zone for the time you want the sync to run.

<table>
<tr><th>Field</th><th colspan="2">Description</th></tr>
<tr><td rowspan="13">Sync Frequency</td><td colspan="2">Select the frequency at which the sync should take place.</td></tr>
<tr><td>Select...</td><td>if the sync is to occur...</td></tr>
<tr><td>Daily</td><td>every day</td></tr>
<tr><td>Specific Day(s) of Week</td><td>on selected days (you will need to specify the days)</td></tr>
<tr><td>First of Month</td><td>on the first of the month</td></tr>
<tr><td>First Day of Month</td><td>first day of the first full week of the month</td></tr>
<tr><td>Last Day of Month</td><td>last day of the month</td></tr>
<tr><td>Last Day of Week of Month</td><td>last day of the full week of the month</td></tr>
<tr><td>First Day of Quarter</td><td>first day of the business quarter</td></tr>
<tr><td>Last Day of Quarter</td><td>last day of the business quarter</td></tr>
<tr><td>First Day of Year</td><td>first day of the calendar year</td></tr>
<tr><td>Last Day of Year</td><td>last day of the calendar year</td></tr>
<tr><td colspan="2" style="display:none"></td></tr>
<tr><td>Days of Week</td><td colspan="2">If the Sync Frequency type is set to Specific Day(s) of Week, select one or more weekdays on which the sync should take place.</td></tr>
<tr><td>Other OptionS</td><td colspan="2">Enter an value/code in this field (rarely used)</td></tr>
</table>

SYNC TYPES

The following Sync Types are available:

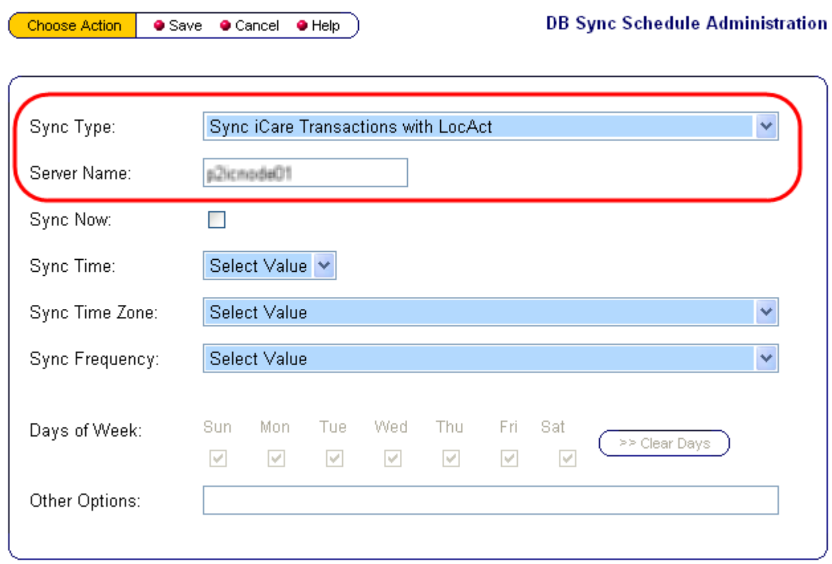
- iCare Customer with Customer Activity
- Expire Points
- Expire Gift or Debit Accounts
- Expire Loyalty Accounts
- Reset Credit Accounts
- Limit and Reload Debit Accounts
- Sync iCare Transaction with LocAct
- Sync iCare Customers with LocAct
- Sync Org Levels
- Sync RTA Org Levels
- Sync Location and Org Levels
- Sync Locations
- Sync Revenue Centers
- Sync Major Group Masters
- Sync Major Groups
- Sync Family Group Masters

- Sync New iCare Customer with Customer Activity
- Sync All Configuration
- Sync Organizations
- Sync Family Groups
- Sync Menu Item Masters
- Sync Menu Items

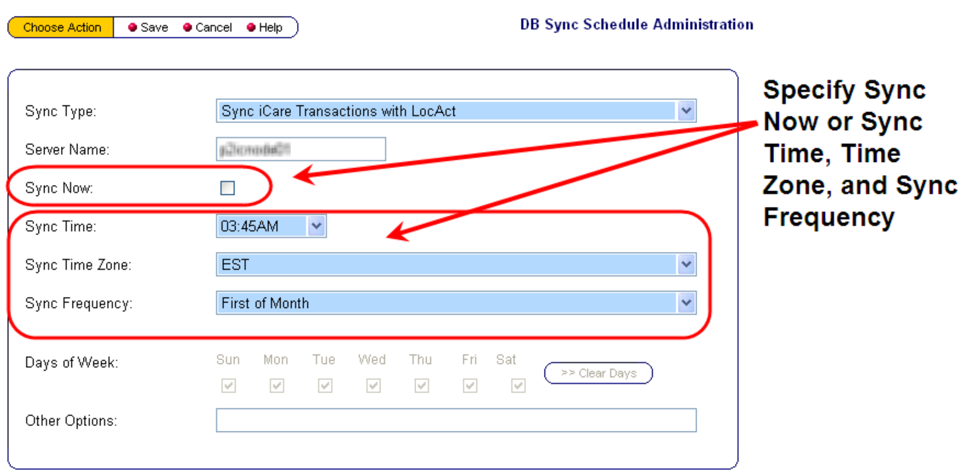
WORKING WITH DATABASE SYNCS

Add a DB Sync

1. Navigate to iCare Admin | iCare Config | Initial GPL Setup and Configuration | DB Sync Schedule | Add
2. Select a Sync Type and Server Name



3. Enable Sync now or specify a Time, Time Zone, and a Frequency Type



4. Save

Customer Note Categories

The iCare Customer Note feature allows an account administrator to associate notes with an account to keep track of any issues that may arise. Notes can be categorized by any classification the organization decides upon. New note categories can be added and existing categories can be modified.

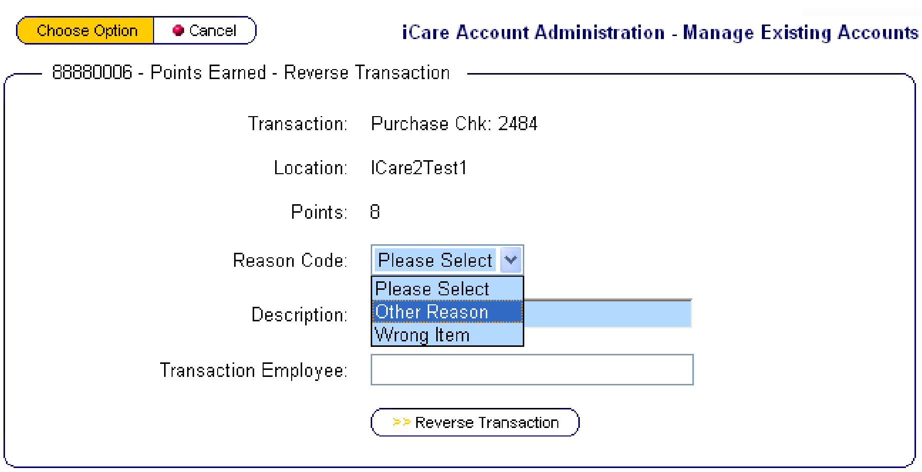
Privileged users may have the ability to assign a red flag to customer notes. Red flags imply some issue with the account. The red flag significance is determined by the organization. Please note, once a red flag is assigned it cannot be removed.

All iCare notes are associated with an iCare customer. Therefore, if a Customer ID cannot be located for that account number, then no new note can be added. A situation like this may occur if the account is issued at the POS, but the iCare customer has not been created in the portal. The database sync process will eventually set up the iCare customer, but prior to that sync, no notes may be added to that account.

Note	Because this task is dependent upon options and configurations defined in both the Account Admin section and the iCare Configuration section, it is considered an Advanced Task. For more information, please refer to Advanced Tasks183 of this document.

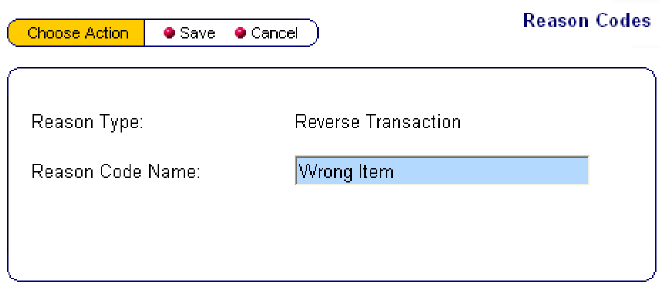
Reason Codes

Define Reason Codes which may be used toward the explanation of a point or award reversal. Reason Codes defined within this module will be available in the Account Administration for the Reverse Transaction function.



Screen Overview

The following describes the options and fields located on the Reason Codes screen:



Field	Description
Reason Type	Select/Displays the category of Reason Code. At this time, Reason Codes may only be developed for Reverse Transactions.
Reason Code Name	Enter/Displays the name of the Reason Code

Create a Reason Code

1. Navigate to iCare Admin | iCare Config | Initial GPL Setup and Configuration | Reason Codes | Add
2. Select the Reason Code type from the drop-down list and enter a reason code name in the Reason Code Name field
3. Select Save from the top menu bar

Standalone Terminals

MICROS has extended their iCare functionality to non-MICROS POS, specifically standalone terminals. This increased flexibility gives more organizations the ability to incorporate the powerful and comprehensive iCare Customer Relationship Management tool into their businesses.

iCare functionality for standalone terminals is configured on a location-by-location basis. The feature has been designed this way, since many organizations may choose to use of both MICROS POS, as well as other, third-party generic interfaces.

Note	*At this time, MICROS iCare can be configured to work with VeriFone Vx570 Terminals.* *VeriFone™ is a registered trademark of VeriFone.*

After designating the location available for standalone terminal configuration, six categories of configuration must be established. These default settings are the general or "standard" configuration for any standalone terminal. These settings include:

- Default Parameter - establish basic default parameters for standalone terminal interfacing with the MICROS Stored Value Card Server
- Terminal Type - provide available terminal types for use
- Receipt Configuration - define header and footer content that will appear on receipt chits
- Program Configuration - indicate which programs will be available for use at the standalone terminal
- Revenue Center Configuration - specify any and all revenue centers wherein standalone terminals will be used with iCare
- POS Screen Configuration - assign the corresponding POS Configuration settings to the standalone terminal architecture

Default Parameter, Receipt Configuration, and Revenue Center Configuration settings may be overriden at the location level

Functionality & Limitations

Since they are not fully integrated with the POS, standalone terminals have limitations with respect to iCare functionality.

PRIOR VISIT CREDIT

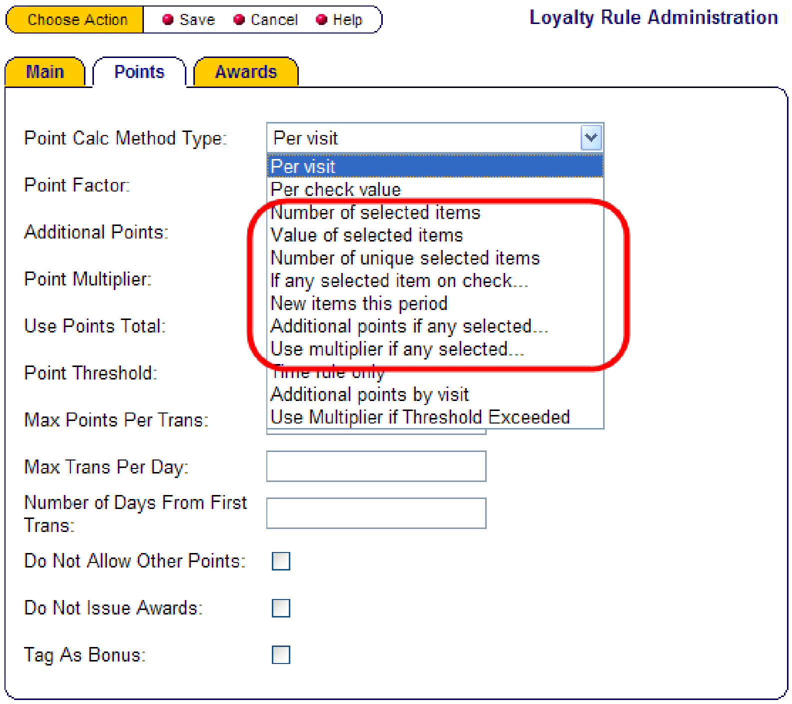
Members will not be able to receive credit for prior visit.

EARNING CREDITS/ISSUING POINTS

When issuing points, Check Total and Subtotal will be the same values. No transaction detail will be available for the check, meaning the standalone terminal will not "upload" any check detail to the portal; only the act of issuing the points/awards will be provided. Therefore, no reporting on the items in that will be available.

Eligibility Rules may restrict the amount of points able to be issued; standalone terminals cannot identify eligibility of items on the check; therefore, cashiers must be trained on how to identify points correctly and issue accordingly.

If you decide to create a rewards program based on the purchase of specific menu items, (i.e., customer receives points for every sandwich ordered), the Vx570 has no means of verifying the presence of that menu item on the check



As such, using any of the following point calculation method types will result in no point issuance:

- Number of Selected Items
- Value of Selected Items
- Number of Unique Selected Items
- If any item selected on Check
- New items this period
- Additional points if any selected...
- Use multiplier if any selected...

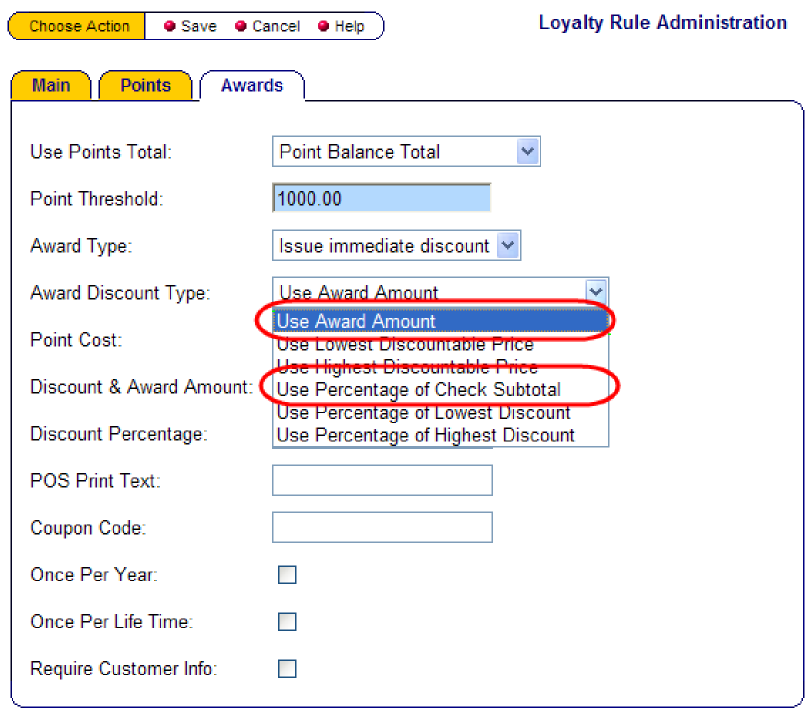
Accepting Reward Coupons

At this time, standalone terminals cannot check for coupon eligibility or calculate a coupon's amount. Can only determine coupon validity, i.e., the coupon has not been used/is not expired. Therefore, employees must be trained on how to administer coupons when customers meet their threshold.

Coupons with Redemption Rules are not able to be evaluated by standalone terminals; this does not mean Redemption Rules cannot be configured; rather, standalone terminals is not able to process the Redemption parameters. Coupon value will be accepted in to match the amount in request, and will never exceed the amount in request. However, it may be less than the requested amount. For example, if it is a fixed amount of $5 coupon, $2.50 will be accepted if the requested amount is $2.50 instead of $5. $5 will be accepted if the requested amount is $50.

Immediate Discounts

To issue an immediate discount that is not a stored value credit or a coupon, you must use the Award Discount Types of "Use Award Amount" or "Use Percentage of Check Subtotal" on the Awards Tab of the Loyalty Rule Administration page in the portal.



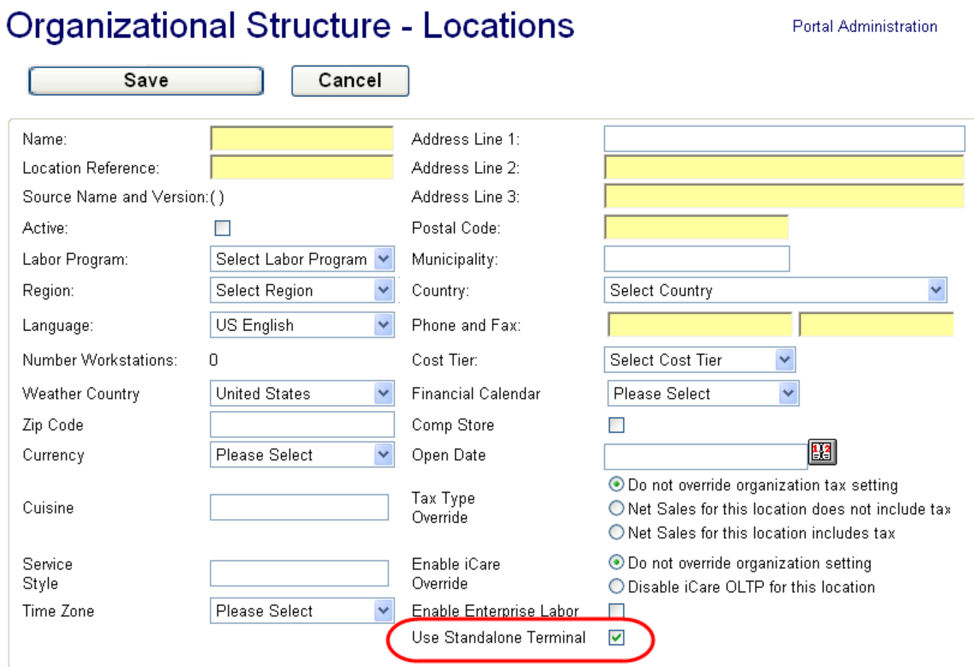
Portal Configuration

As previously mentioned, setting up an organization/location to use standalone terminals requires multiple steps. The steps required to use standalone terminals are detailed in this section.

I. Configure the Location to Use a standalone Terminal

Location must be configured to accept standalone terminal transactions. Therefore, the first step in securing the ability to perform iCare functions on a standalone terminal configuring the location.

1. Login as Sys Admin
2. Navigate to Admin | Portal | Organizational Structure | Locations
3. Select a location and click Edit
4. Enable the option marked Use Standalone Terminal:



5. Save

Note	*This step may have been performed during the initial setup and implementation of the organization when locations are being added to the reporting structure.* *Please be sure this option bit is enabled, otherwise the location will not be available to receive standalone terminal configuration settings.* *As always, when locations are added or updated, you must remember to sync the information via iCare Admin | Initial iCare Setup & Configuration | DB Sync Schedule.*

II. Setup the Rewards Program

Typically, the MICROS Implementation Group will configure loyalty and award programs for your organization. This step should have already been performed. Program configuration is outside the scope of this section. For more information please refer to Programs, Cards, Coupons, and Rules.

The following must be configured:

- Card Rule
- Loyalty Program
- Loyalty Point Issue Rule & Point Award Rule
- Eligibility Rule
- Link all Rules to the Program

Note	*These steps must be configured, regardless of whether the enterprise is using a MICROS POS or a Standalone Terminal.*

III. Portal Configuration

After designating the location available for standalone terminal configuration, six categories of configuration must be established. These default settings are the general or “standard” configuration for any standalone terminal. As previously mentioned, these settings include:

- Default Parameter
- Terminal Type
- Receipt Configuration
- Program Configuration
- Revenue Center Configuration
- POS Screen Configuration

Default Parameter, Receipt Configuration, and Revenue Center Configuration settings may be overriden at the location level.

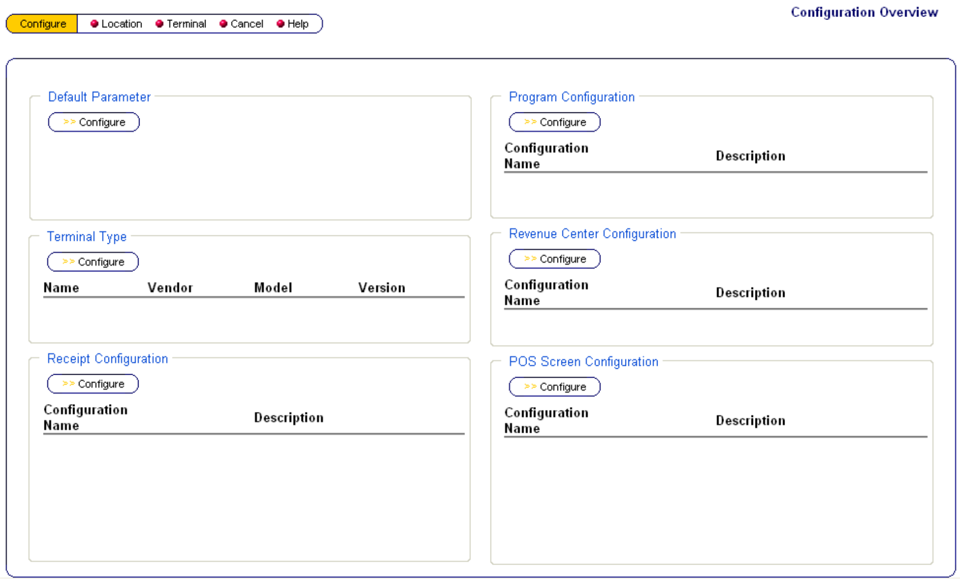
III. Configuration

There are six types of configuration (mentioned above) that must take place before standalone terminals may be assigned to locations. **These settings must be configured before standalone terminals may be used for iCare at the location.** From the Configuration Overview page, both standard and location-specific standalone features may be enabled.

To access the Configuration Overview page:

1. Login as Sys Admin

2. Navigate to iCare Admin | iCare Config | Standalone Terminal Configuration | Terminal Configuration; the following page will appear:

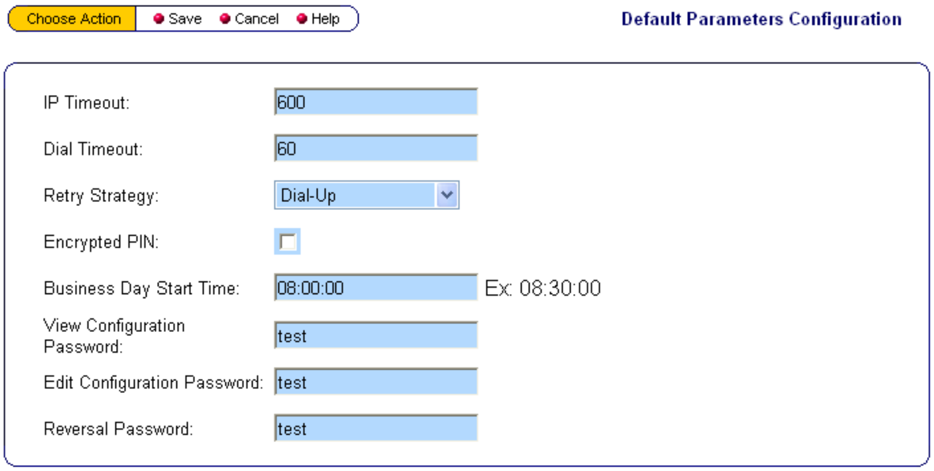


Note	*All configuration steps from this point on assume you have performed the previous task.*

Configure the Default Parameter

1. Click the Configure button in the Default Parameter section

2. Configure the page according the descriptions found in the table below:



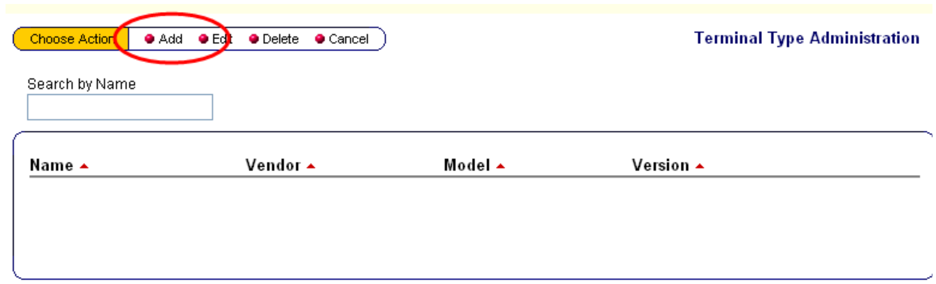
Field	Description
IP Timeout	Enter the number of seconds the terminal should wait before retrying/canceling the transaction. The should be at least 15 seconds. The default is 60 seconds.
Dial Timeout	Enter the number of seconds the terminal should wait before retrying or canceling the transaction. The timeout should be at least 30 seconds. The default is 60 seconds.
Retry Strategy	Select the appropriate retry strategy: ◆ No Retry - system will not attempt to transmit data ◆ Same Connection - system will use the same connection to transmit data, if retransmit data flag = Yes ◆ Dial Up - system will use the dial-up connection to transmit data, if retransmit data flag = Yes
Encrypted PIN	Enable this option if an encrypted PIN will be used
Business Day Start Time	Enter the business day start time 24-hour format (0:00 - 23:59)
View Configuration Password	Enter a password which can be entered to grant local level viewing of configurations. 8-integer limit

Field	Description
Edit Configuration Password	Enter a password which can be entered to grant local level setup and configurations 8-integer limit
Reversal Password	Enter a password which can be entered to grant point/ award reversals at the local level. 8-integer limit

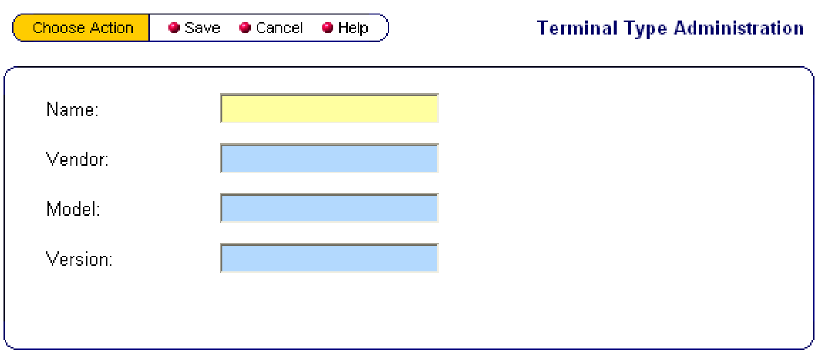
3. Save

Configure the Terminal Type

1. Click the Configure button in the Terminal Type section
2. Click Add from the top menu bar to add a new standalone terminal:



3. Configure the page according the descriptions found in the table below:

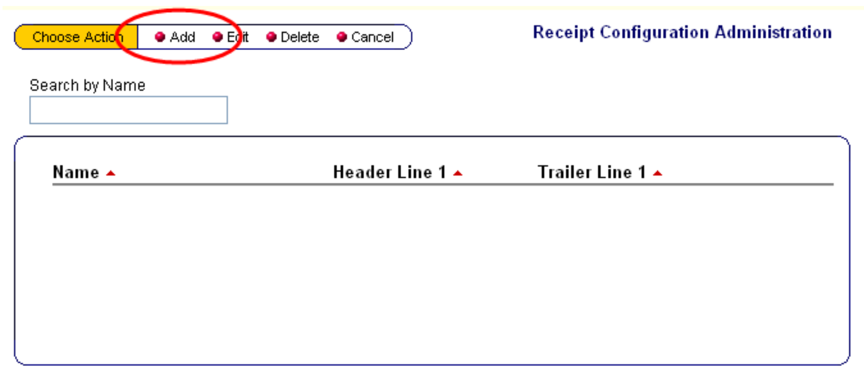


Field	Description
Name	Enter a name for the terminal
Vendor	Specify the terminal's vendor
Model	Specify the terminal's model number
Version	Specify the terminal's application version number

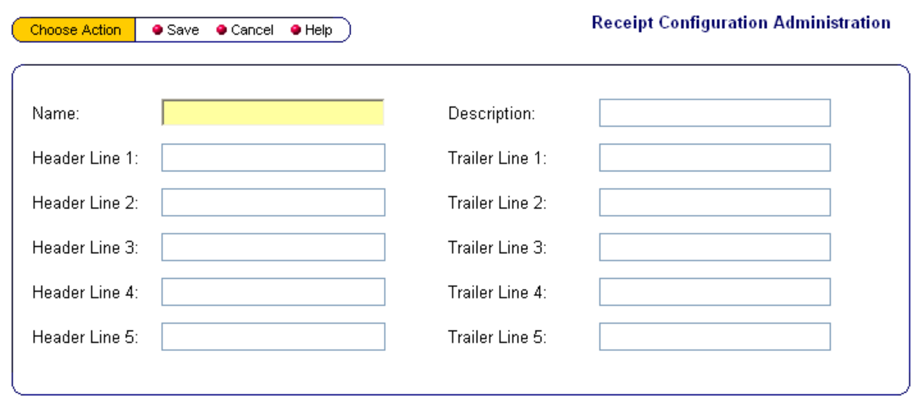
4. Save

Configure the Receipt Configuration

1. Click the Configure button in the Receipt Configuration section
2. Click Add from the top menu bar to configure text for a receipt:



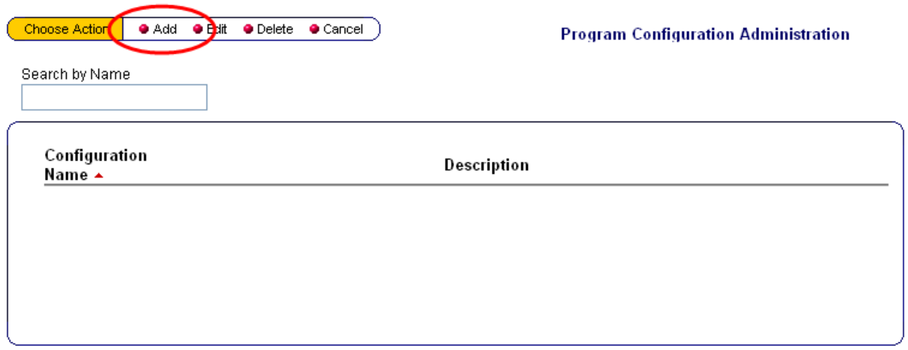
3. Configure the page according the descriptions found in the table below:



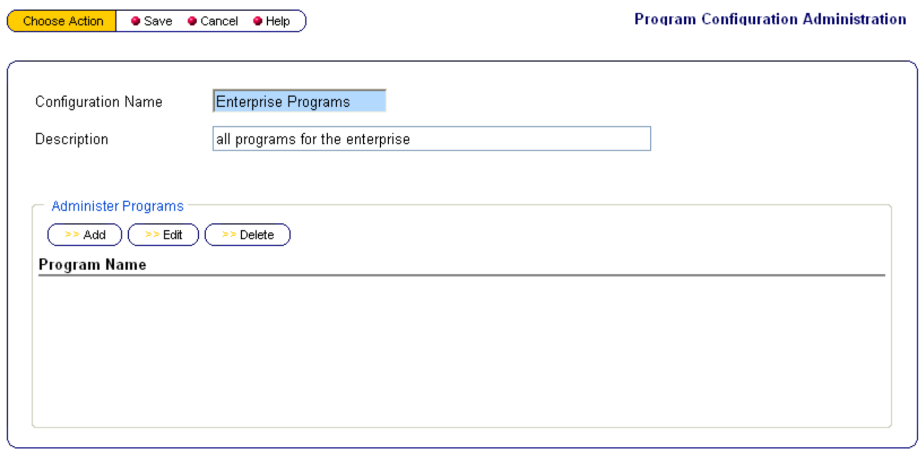
Field	Description
Name	Enter a name for the receipt
Description	Enter a brief description for the receipt's purposes
Header Line 1-5	Enter text to be included in the receipt header lines. Blank lines will be omitted/suppressed. 32-character alphanumeric limit. Lines less than 32 characters will be automatically centered.
Trailer Line 1-5	Enter text to be included in the receipt trailer lines. Blank lines will be omitted/suppressed. 32-character alphanumeric limit. Lines less than 32 characters will be automatically centered.

Configure the Program Configuration

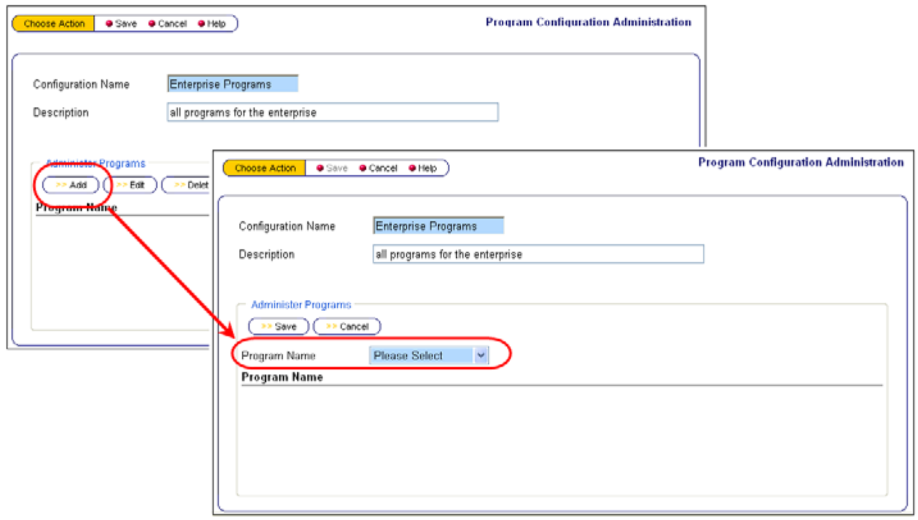
1. Click the Configure button in the Program Configuration section
2. Click Add from the top menu bar to link GPL programs:



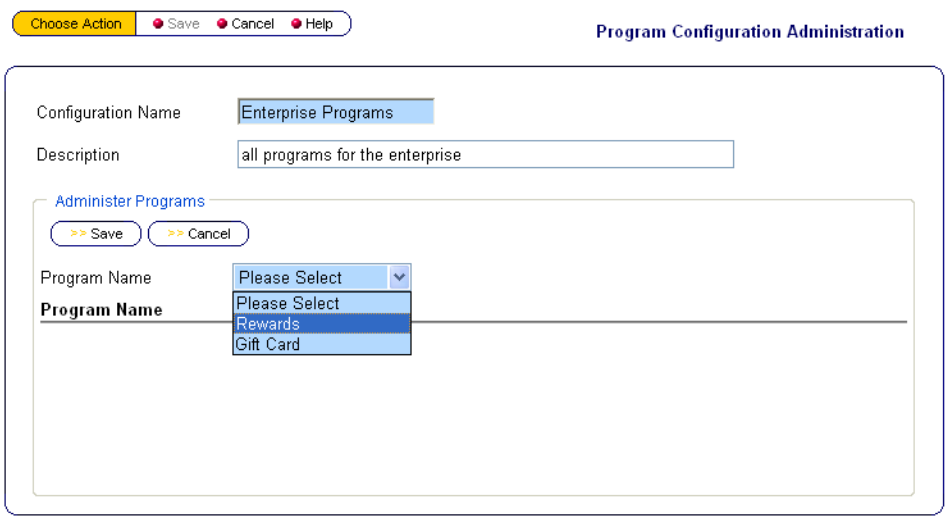
3. Enter a name and a brief description in the Configuration Name and Description fields:



4. Click the Add button to reveal a drop-down list from which you can select available iCare Programs to link to the configuration:

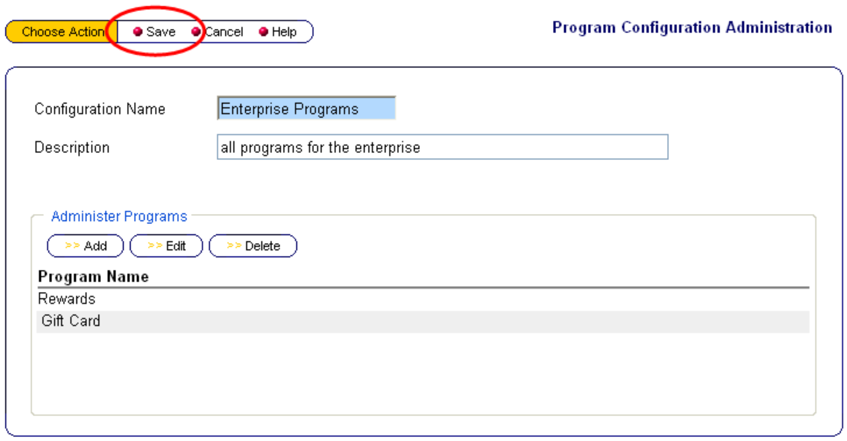


5. Use the drop-down list to select an iCare Program and click Save



6. Repeat step 5 for any additional iCare Programs to be added to the Configuration

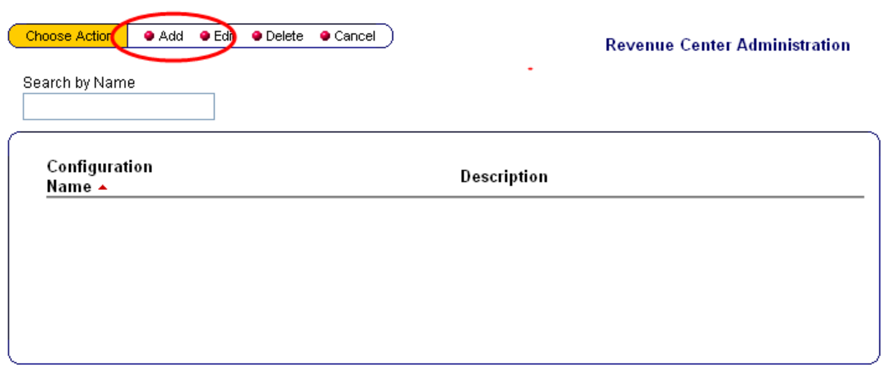
7. Click Save from the top menu bar to maintain your updates



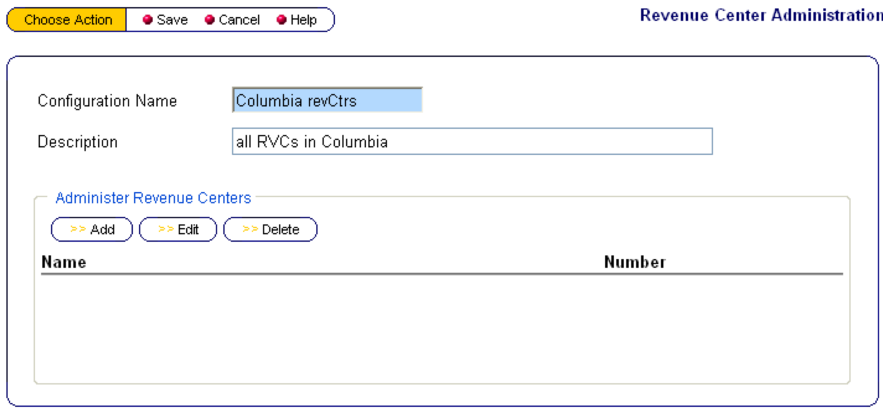
Note	*iCare Programs are typically configured by the mymicros Implementation Team via iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules.*

Configure the Revenue Center Configuration

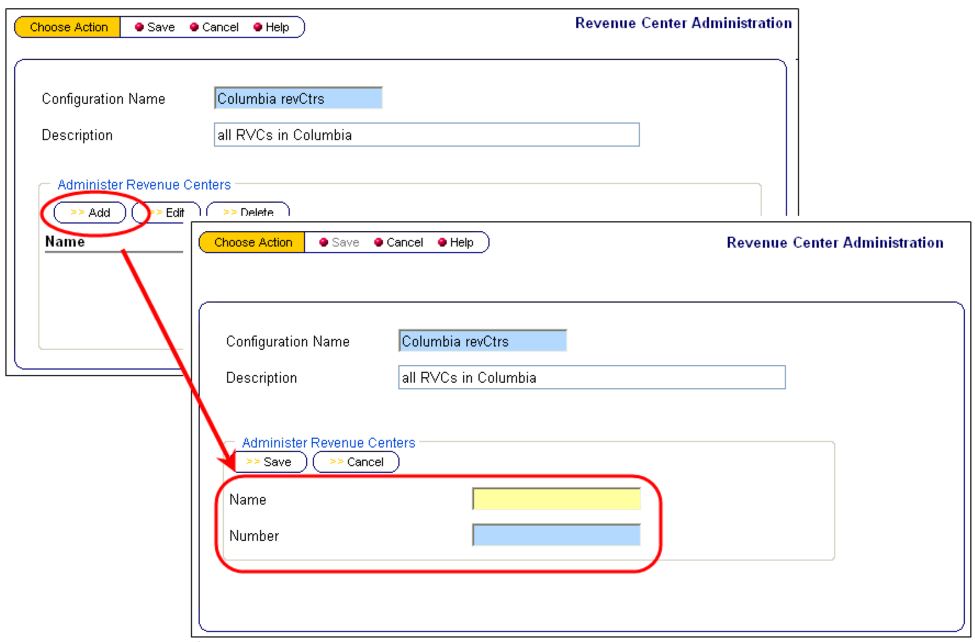
1. Click the Configure button in the Revenue Center Configuration section
2. Click Add from the top menu bar to link Revenue Centers:



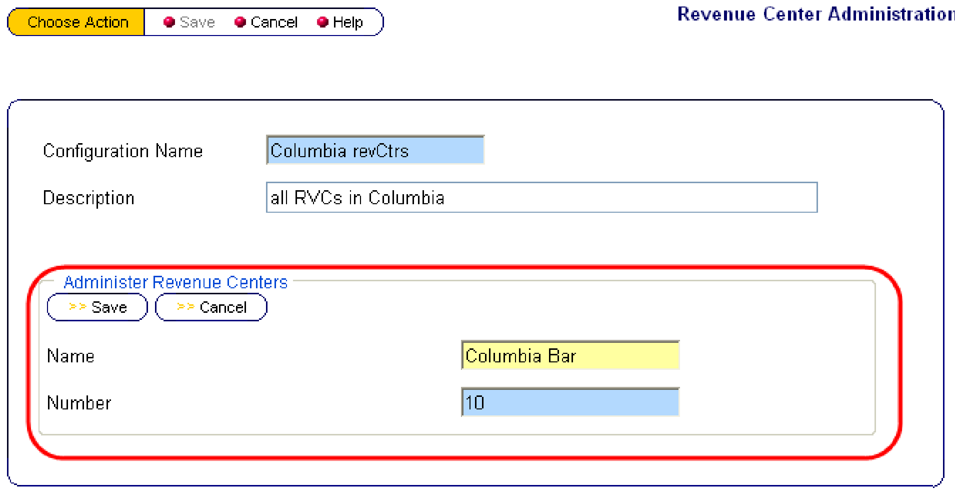
3. Enter a name and a brief description about the Revenue Centers:



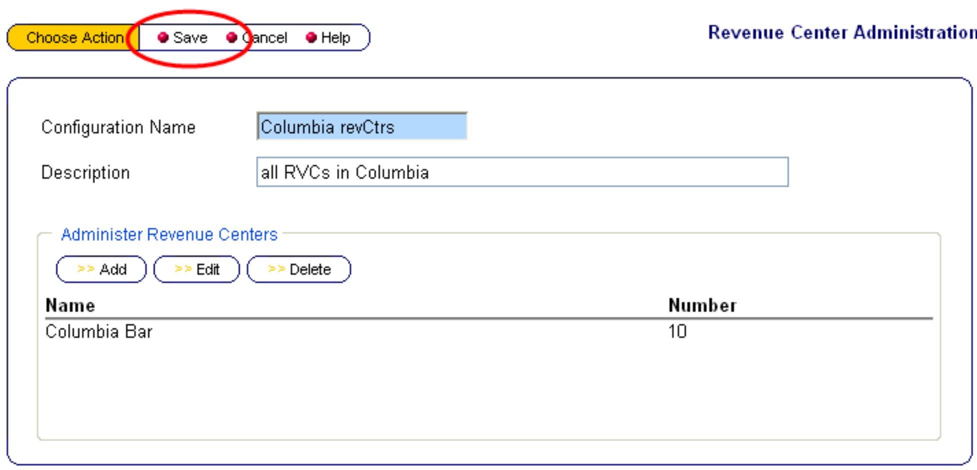
4. Click the Add button to reveal an area where you can enter the Revenue Center Name (16-character alphanumeric limit) and its RVC Number (9-integer limit):



5. Enter the name and number for the RVC in the fields provided and click Save to update the form



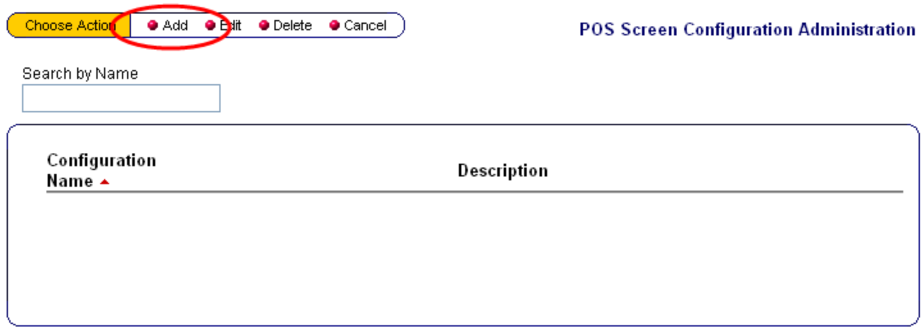
6. Repeat step 5 for any and all RVCs to be included in this configuration
7. Click Save from the top menu bar to maintain all updates to this form



Configure the POS Screen Configuration

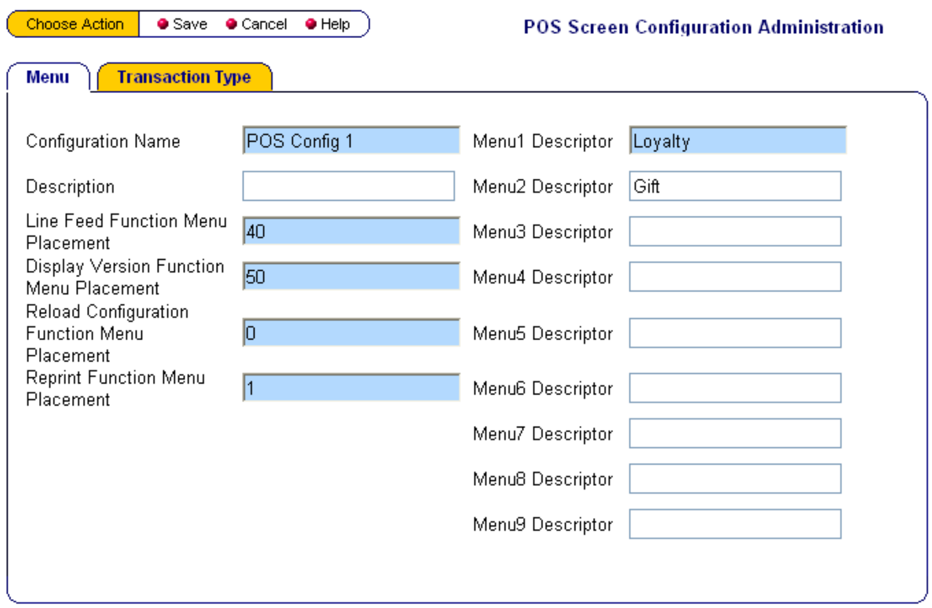
1. Click the Configure button in the POS Screen Configuration section

2. Click Add from the top menu bar to add a new POS Screen Configuration:



There are 2 tabs on the Add POS Screen Configuration Page: Main and Transaction Type

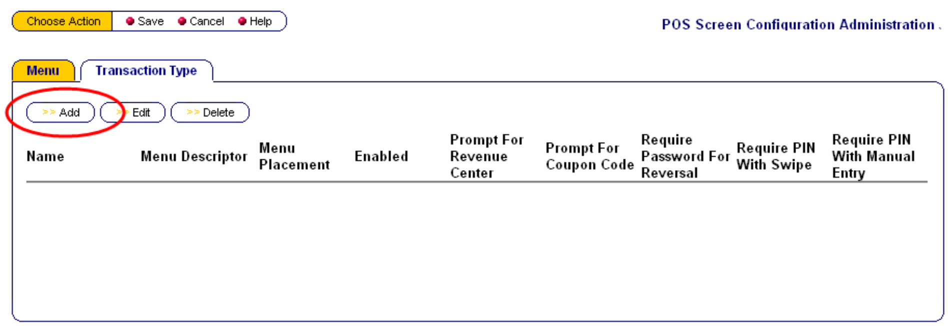
3. On the Main Tab, configure the fields according to the table below:



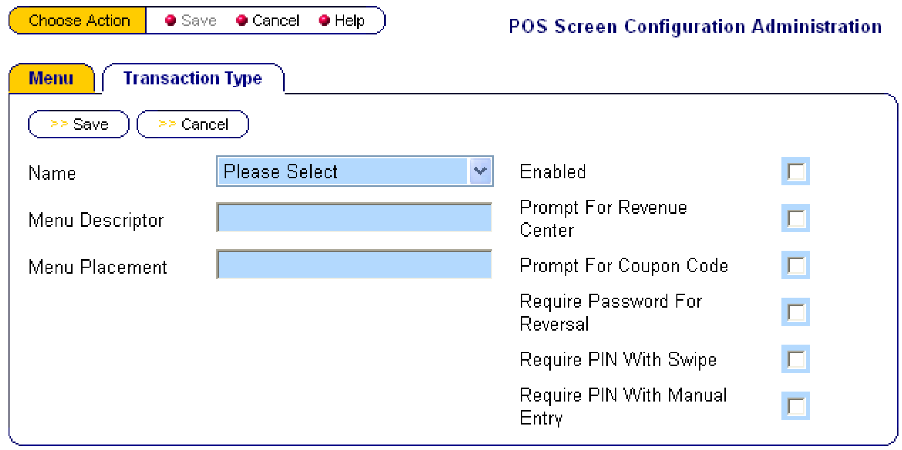
Field	Description
Configuration Name	Enter a name for the POS Screen Configuration
Description	Enter a brief description for the POS Screen Configuration
Line Feed Function Menu Placement	Enter the placement for the Line Feed Function in the menu (1, 10-99) 2-integer limit

Field	Description
Display Version Function Menu Placement	Enter the placement of Display Version Function in menu (0, 10-99) 2-integer limit
Reload Configuration Function Menu Placement	Enter the placement of Reload Configuration Function in menu (0, 10-99) 2-integer limit
Reprint Function Menu Placement	Enter the placement of Reprint Function in menu (0, 10-99) 2-integer limit
Menu1-9 Descriptor	Enter any menu descriptors to be placed in positions 1-9; only the first descriptor is required

4. On the Transaction Type Tab, click Add to add a Transaction Type to the POS Screen:



5. Configure the page according the descriptions found in the table below:

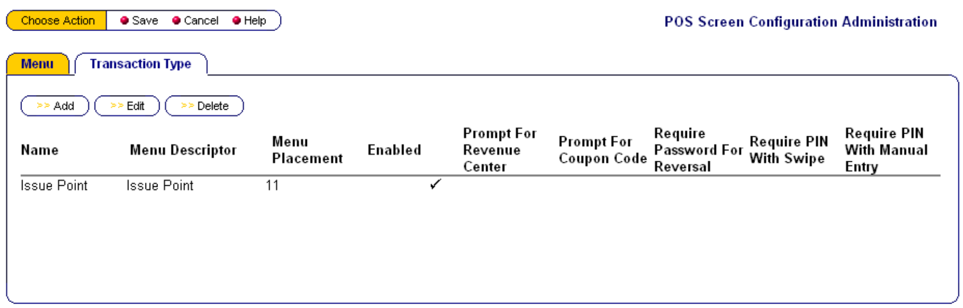


Field	Description	
Name	Use the drop-down list to select from available transaction types	
	Select...	*to...*
	Issue Account	issue a stored value card
	Activate Account	activate a stored value card
	Reload Account	recharge, reload, or add additional value to a stored value account
	Authorize Redemption	request authorization to debit a stored value account for a specified amount
	Redeem Point	redeem earned points through the terminal
	Cash Out Account	provide cash back for a stored value card

Field	Description	
Name (cont'd)	Inquire Balance	obtain the account balance on a stored value card
	Transfer Balance	transfer the account balance from one account number or card to another account number or card
	Issue Point	assign points to a loyalty card
	Inquire Point Balance	retrieve a specific loyalty card's point balance
	Lookup Customer by Phone Number	search for a customer by his/her provided phone number
	Lookup Customer by Name	search for a customer by a combination of first and last name or by last name only.
	Accept Coupon	accept the coupon
Menu Descriptor	Enter a brief description for the function type.	
Menu Placement	Placement on the menu tree (0, 10-99). The first digit defines top menu level. The second digit defines the second menu level.	
Enabled	Enable this option to activate the transaction, i.e., to make the Issue Points feature function, you must enable this option bit.	
Prompt for Revenue Center	Enable this option bit if the employee will be able to select at which revenue center the points/credits were earned or the award was redeemed	
Prompt for Coupon Code	Enable this option if the employee will be required to enter a coupon code upon award redemption	
Require Password for Reversal	Enable this option if the employee will be required to enter a password in order to process a point and/or award reversal transaction Refer to Default Parameters for the default reversal password	

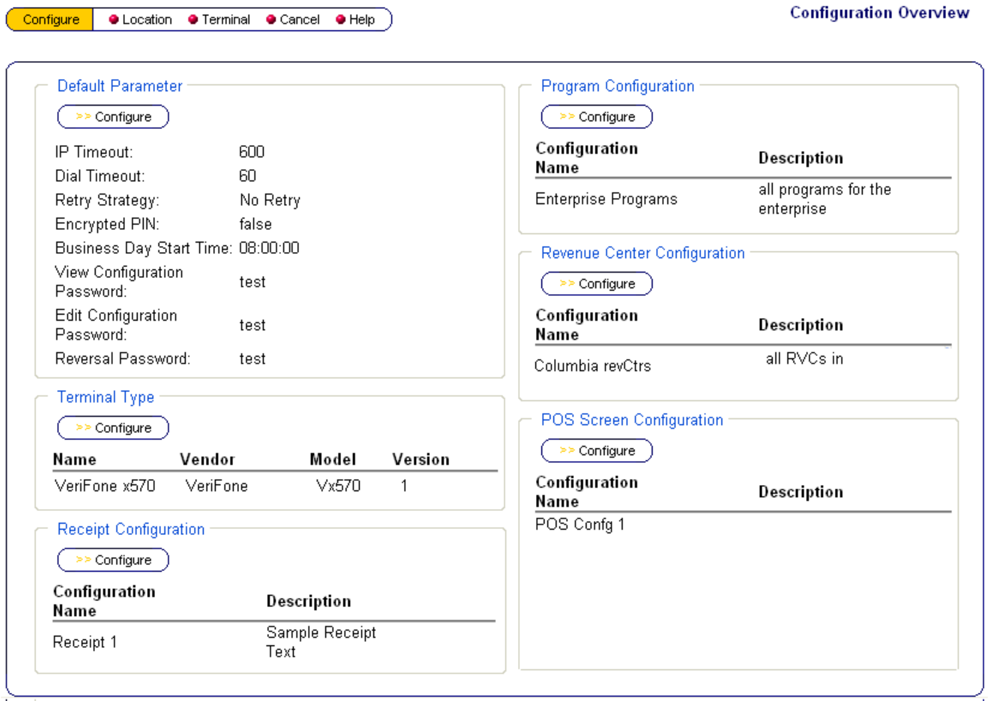
Field	Description
Require PIN with Swipe	Enable this option if the employee will be required to enter a PIN when a loyalty card is swiped
Require PIN with Manual Entry	Enable this option if the employee will be required to enter a PIN when a loyalty card transaction must be processed manually

6. Click Save to maintain your updates on this page - your updates will appear on the Transaction Types tab:



7. When the Main and Transaction Types Tabs have been updated appropriately, click Save from the top menu bar

When all configurations have been set, the Configurations Overview page will resemble the following:

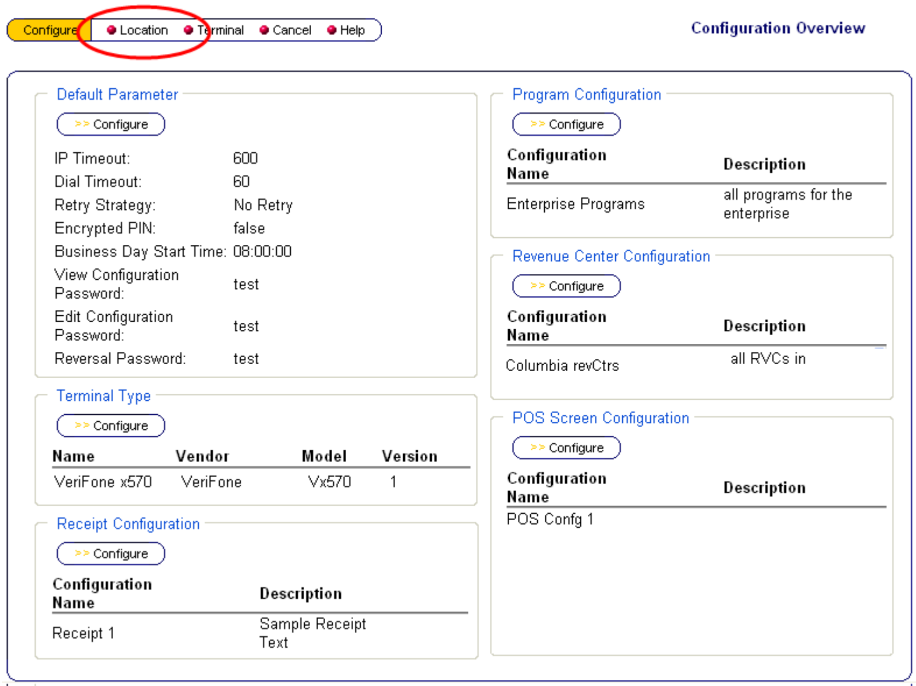


IV. Assign Configurations to Locations

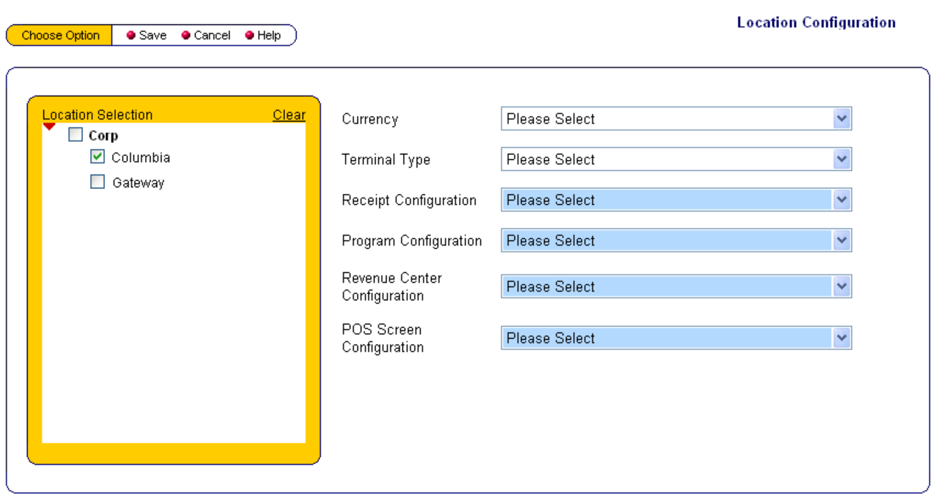
Configure location specific settings in this area of Standalone Configuration. Only locations designated as Standalone locations will appear in this list.

1. Login as Sys Admin
2. Navigate to iCare Admin | iCare Config | Standalone Terminal Configuration | Terminal Configuration

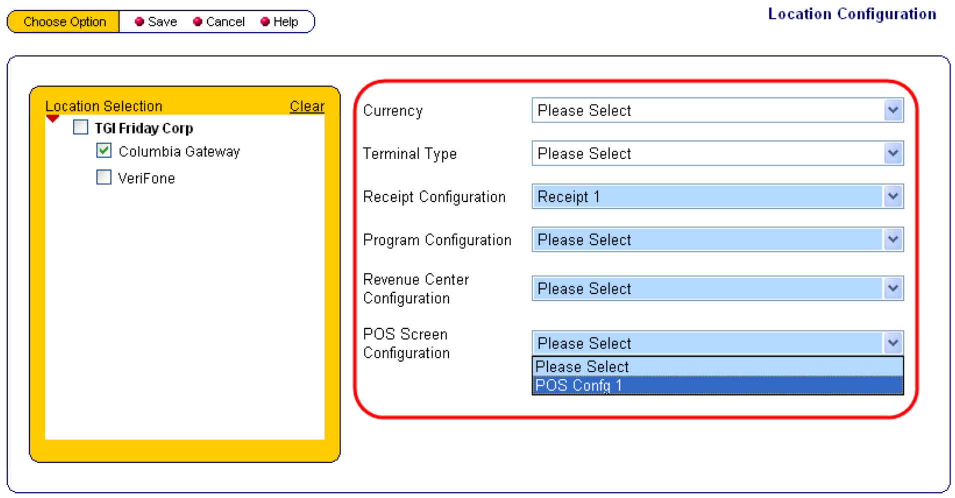
3. After completing the configurations (see above), click Locations from the top menu bar:



4. Select the corporate level or select locations individually by enabling the check boxes next to the location name:



5. Use the drop-down lists to specify the types of configuration to be in effect at the selected location(s) [Currency and Terminal Type are not mandatory at this time]:



6. When all configurations have been set, click Save from the top menu bar

Note — *After the location has been specified as a Standalone Terminal location, the following syncs* ***must be run****:*

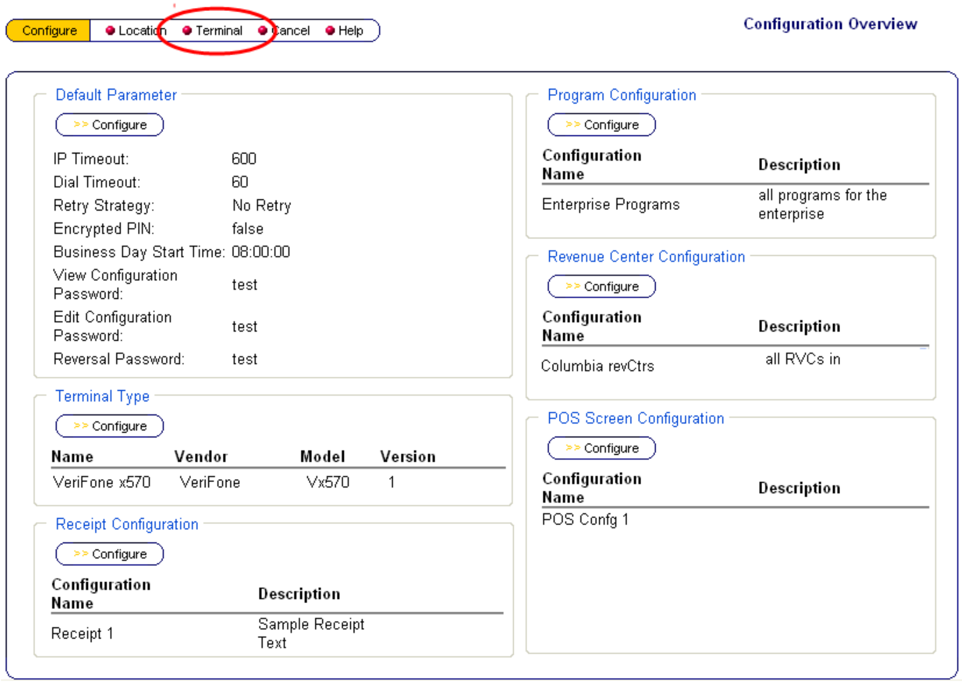
- *Sync Org Levels*
- *Sync Locations*
- *Sync All Configuration*

Failure to perform this syncs will restrict standalone terminals from functioning.

V. Assign Terminals to Locations

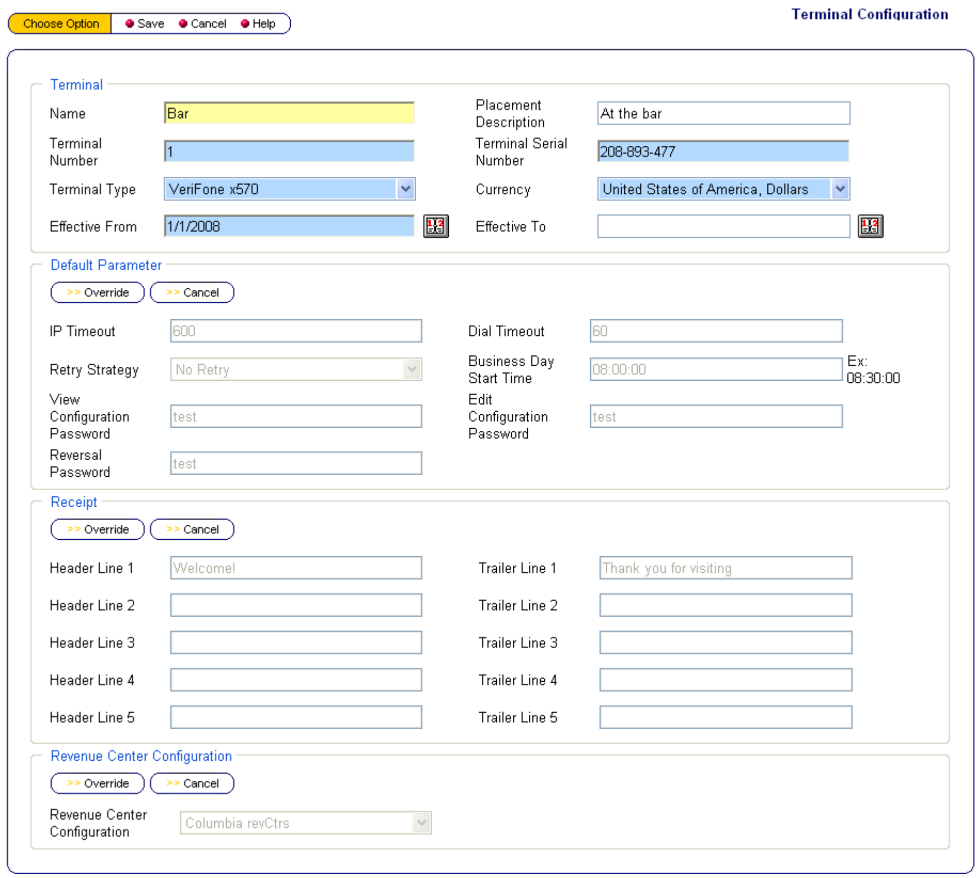
1. Login as Sys Admin
2. Navigate to iCare Admin | iCare Config | Standalone Terminal Configuration | Terminal Configuration

3. After setting standard configurations and establishing location-specific information, click Terminal from the top menu bar:



4. Select a location and click Configure Terminal from the top menu bar:

5. Click Add from the top menu bar to begin adding terminals; a page similar to the following will display:

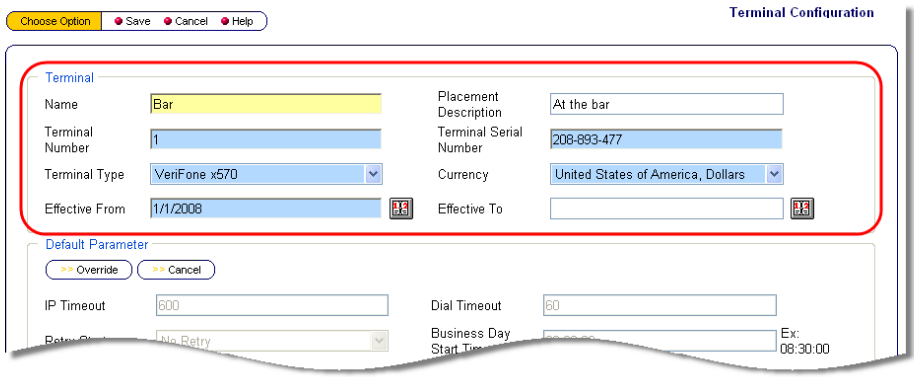


6. In the Terminal fields, modify the following:
   - Enter a Name for the terminal (ex. Bar, Bar 1, Side Station 2, etc.)
   - Enter a brief description
   - Specify the Terminal Number - **you should not have duplicate terminal numbers at a single location**
   - Enter the Terminal Serial Number

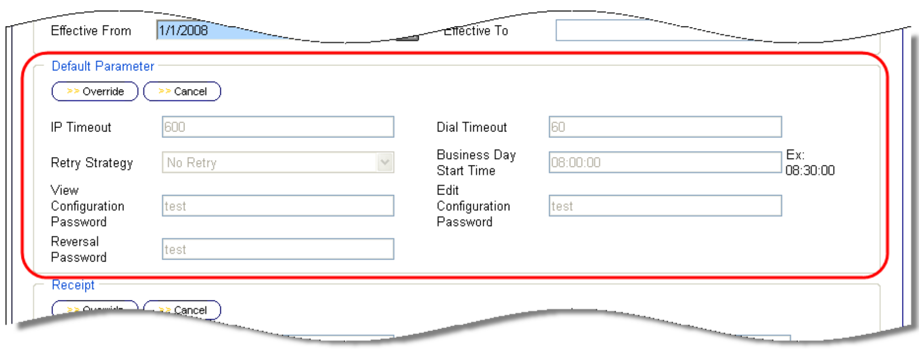
Note	*This number can usually be found on the underside of the terminal*

   - Specify the Terminal Type
   - Use the drop-down list to designate a currency

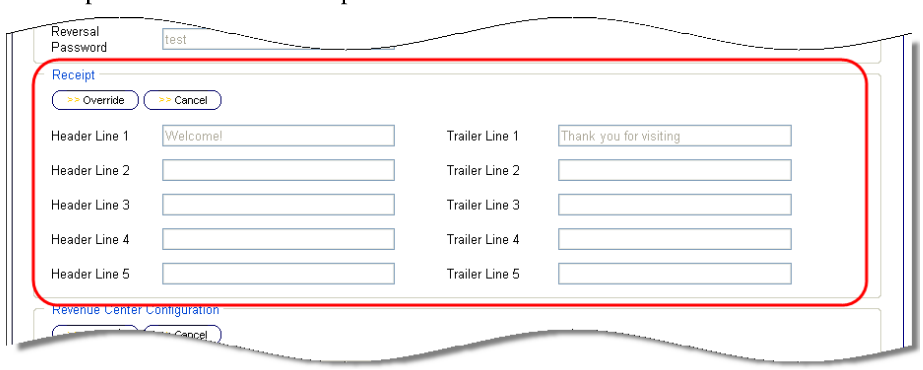
- Enter an Effective From date (required) and an Effective To date (optional)



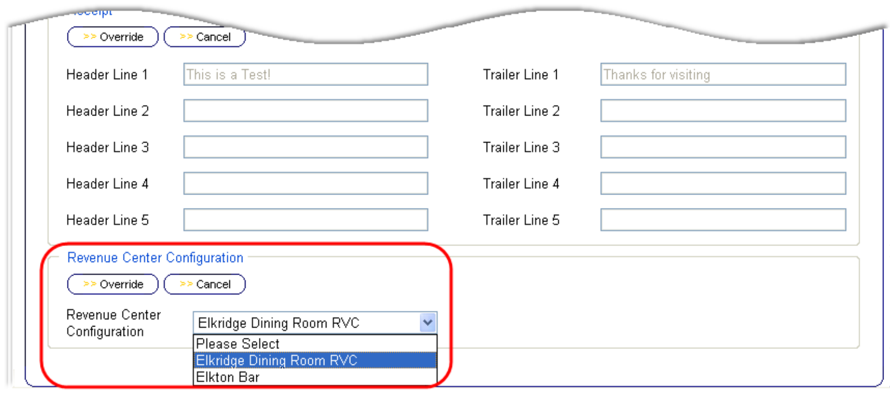
7. If you wish to override the Default Parameter settings, click the Override button in the Default Parameter section and make updates:



8. If you wish to override the Receipt settings, click the Override button in the Receipt section and make updates:



9. If you wish to override the Revenue Center settings, click the Override button in the Revenue Center section and make updates:



10. When all configurations/updates have been made, click Save from the top menu bar

When iCare Customers meet a specified threshold, a coupon can be automatically generated and emailed to them.

Additional Terminal Configuration

The steps included in this section do not paint the entire picture for standalone terminal configuration. In addition to the portal configuration, configuration of the terminal itself must also take place. Depending on the type of terminal being used with iCare, additional steps will most likely need to be defined.

As previously mentioned, MICROS is only supporting the VeriFone Vx570 at this time. For information on standalone configuration support of the Vx570, please refer to the iCare & VeriFone Vx570 Integration document.

Advanced Tasks

Overview

Included in this section is a detailed examination of functions and tasks which require settings in both Account Administration and iCare Configuration to be defined

Allow Offline Redemption

In the event that the online information is not available, MICROS offers the ability to redeem gift cards through an Offline Redemption process. Any store is subject to network outages and network communication problems, and as such, when the in-store redemption system experiences these difficulties, gift card redemption should still be available.

Floor Limits

A Floor limit is an amount the organization has determined to act as a cut off so that contacting the server for redemption is not necessary. If the system network goes offline and a guest wants to pay with a gift card, the organization can only accept the gift card for the amount up to its floor limit.

For example, a guest wants to use a gift card to pay for a meal where the total is $10.50. The organization has a floor limit of $20 and has experienced a network outage. Because the meal amount is less than the floor limit, the gift card will be redeemed through offline redeem.

However, if the same guest has a meal where the total is $27.55. The organization has the same $20 floor limit and has experienced a network outage. When the cashier attempts to redeem the gift card for $27.55, an error message will be produced. The gift card can only be accepted for $20 (or less). The gift card may be used for $20 (the floor limit maximum) and the remaining balance will be up to the guest to settle by another payment method.

Floor limits exist to safeguard the organization from loss. It protects the restaurant from guests who either knowingly or unknowingly misrepresent the balance on their cards. Loss is kept to a minimum since the floor limit reduces the amount that can be applied towards the redemption.

Note	*MICROS Systems Inc. claims no responsibility for insufficient funds for gift cards redeemed offline. Offline Redemption is an optional feature. Any losses to the organization due to insufficient gift card funds are the responsibility of the organization.*

CONFIGURATION

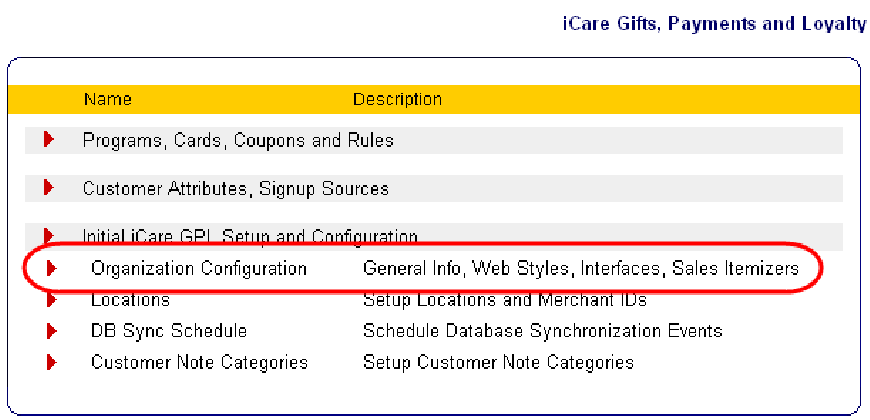
To enable the Offline Redemption feature in the Portal, three items must be configured:

1. Set a Floor Limit
2. Enable the “Allow Offline” Option
3. Edit the POS Key

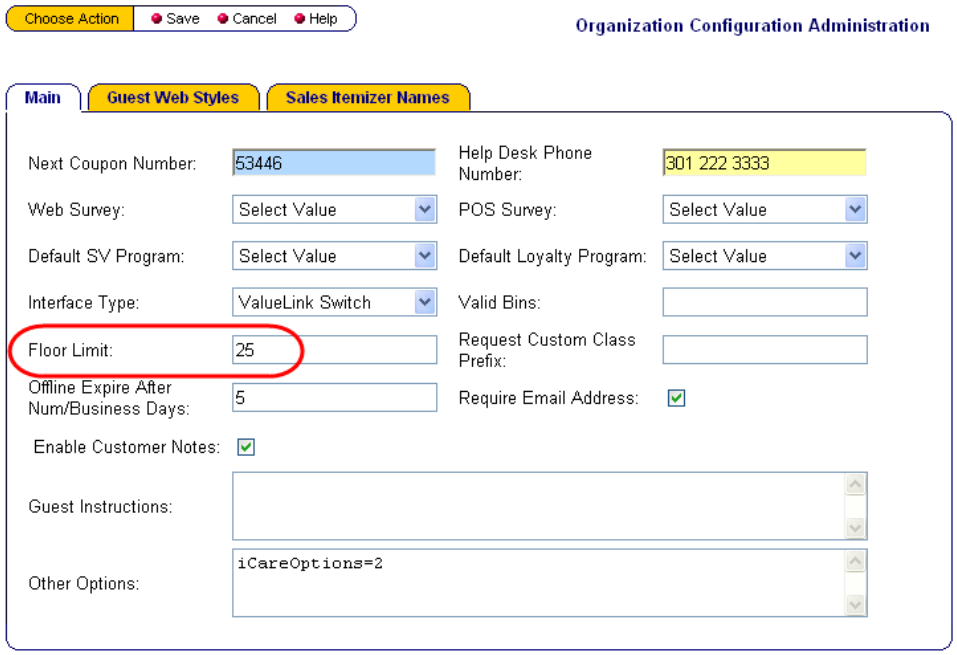
Set a Floor Limit

The first step to enabling the Offline Redemption process is to set the floor limit. The floor limit can be any amount the organization decides is acceptable as a possible loss. Floor limits should take into consideration the menu costs as well as how much the organization is essentially willing to risk. To set up and offline redemption:

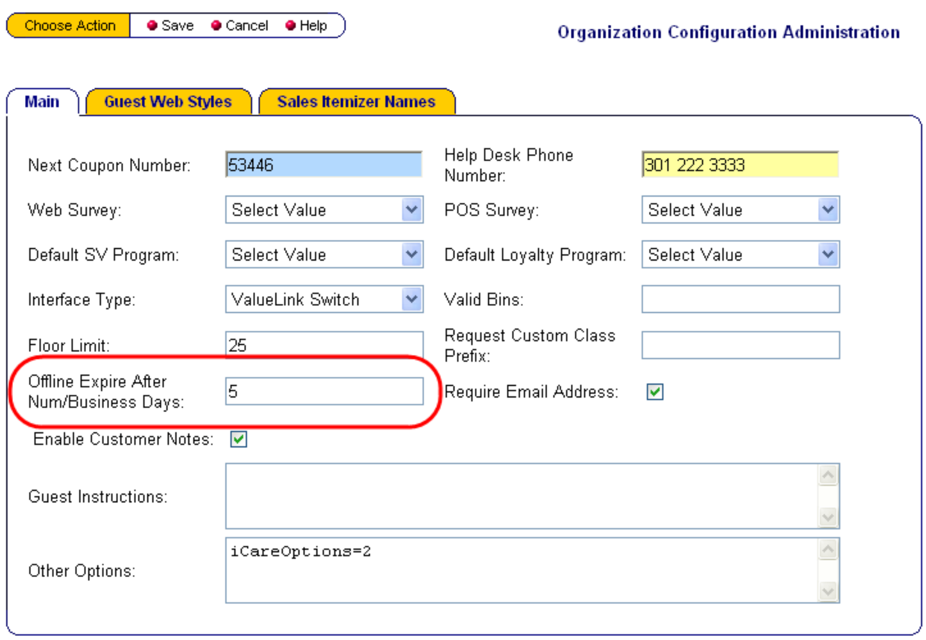
1. Login as Sys Admin
2. Navigate to iCare | iCare Configuration | Initial iCare GPL Setup & Configuration | Organization Configuration



3. On the Main Tab, enter an amount in the Floor Limit field



4. Enter a Value in the Offline Expire After Num/Business Days field.



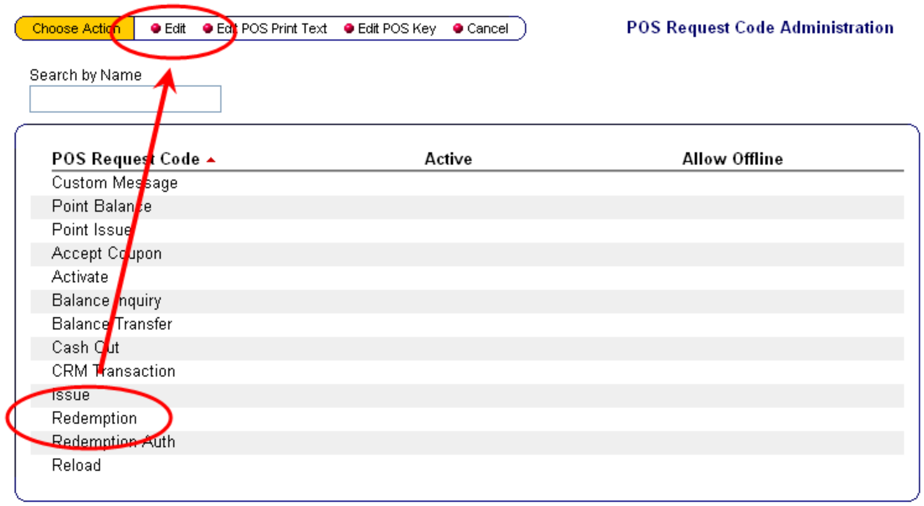
Note	*This value specifies how long the offline transactions will remain in the offline buffer.* *If you leave this field blank, the transactions will never be cleared from the buffer.*

5. Save

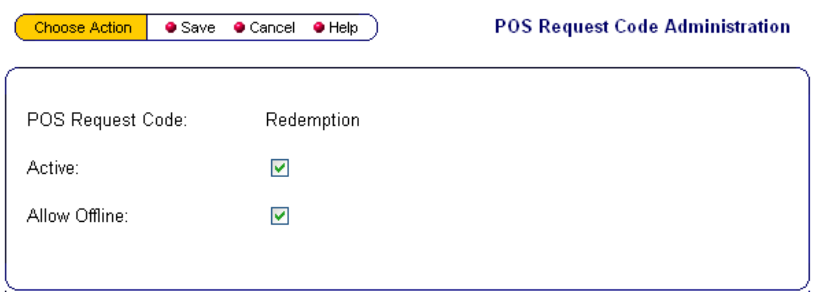
Enable the Allow Offline Option

Enabling the “Allow Offline” option permits the redemptions to be taken offline. If this feature is not configured, then the Redemption will not have offline capability. To enable the Allow Offline option:

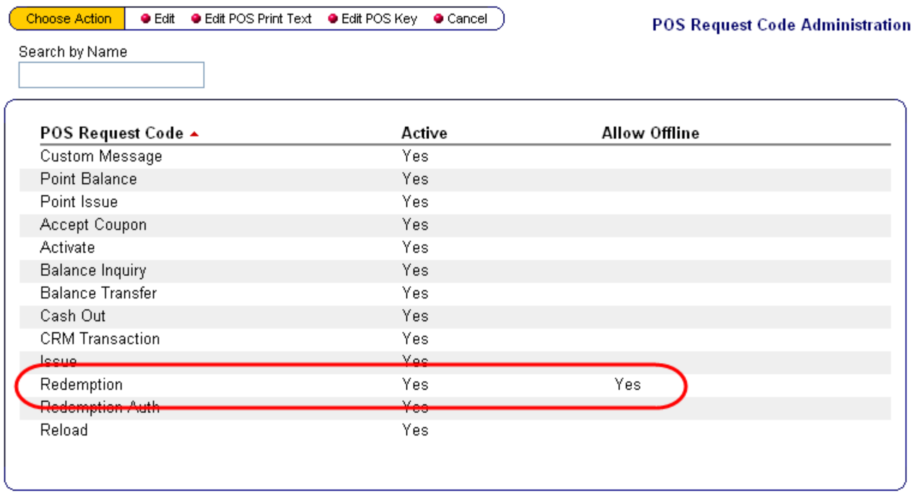
1. Login as Sys Admin (if not currently logged in)
2. Navigate to iCare | iCare Configuration | Programs, Cards, Coupons, and Rules | POS Configuration | Redemption | Edit



3. Enable Allow Offline (enable Active if it is not already enabled)



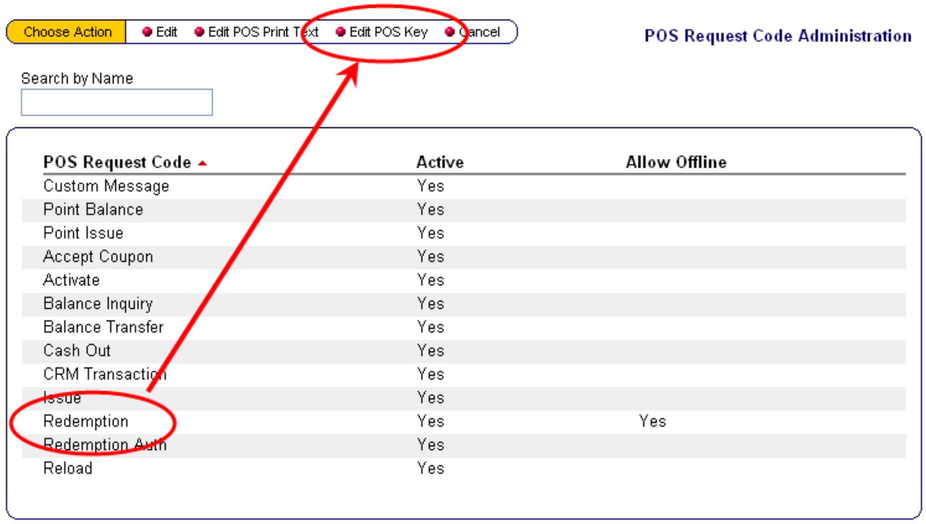
4. Save - the Redemption POS Request Code will be modified to display the following:



Edit the POS Key

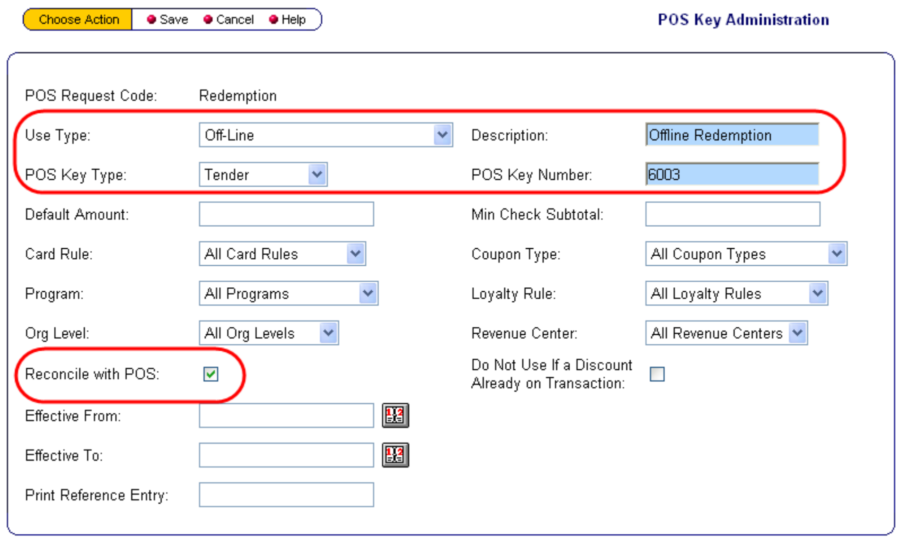
After the floor limit is determined and the Redemption option is set to allow offline redemptions, the POS must be given the ability to take offline redemptions. To edit the POS Key:

1. Login as Sys Admin (if not currently logged in)
2. Navigate to iCare | iCare Configuration | Programs, Cards, Coupons, and Rules | POS Configuration | Redemption | Edit POS Key



3. Select Add

4. Adjust the fields as follows:
   - Use Type = Off-Line
   - Description = Offline Tender
   - POS Key Type = Tender
   - POS Key Number = (this number corresponds to the number programmed at the POS and the existing Redemption POS Key entered)
   - Enable Reconcile at POS

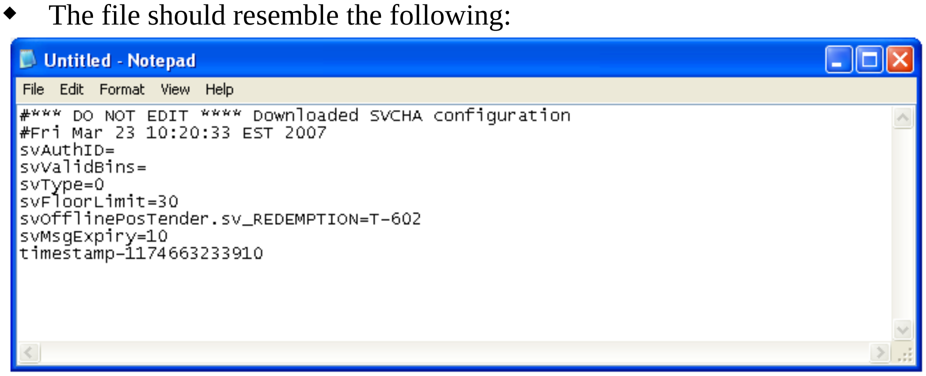


5. Save

Verify Offline Redeem

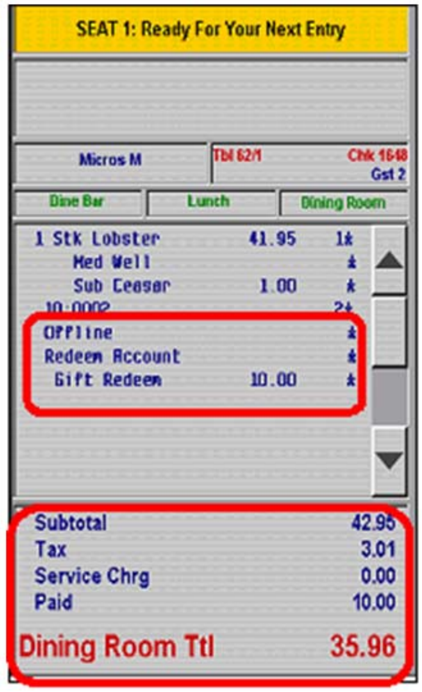
To check to ensure the offline redemption is operating properly:

1. Restart the MICROS Agent Service and Watchdog Services
2. Navigate to MICROS Drive | MICROS | RTA | svcha.properties
   - Open the file and verify that **offline tender** and **floor limit** are listed
   - The file should resemble the following:



Example of the POS

When a gift card is redeemed offline, the POS will reflect the transaction.In this example, the floor limit was set to $10.00. After the gift card was redeemed offline, the $10 was applied toward the check and the new total was made available.The guest is still responsible for the remaining balance:



Customer Notes Feature

The iCare Customer Note feature allows an account administrator to associate notes with an account to keep track of any issues that may arise. Notes can be categorized by any classification the organization decides upon. New note categories can be added and existing categories can be modified.

Privileged users may have the ability to assign a red flag to customer notes. Red flags imply some issue with the account. The red flag significance is determined by the organization. Please note, once an account is red flagged, the red flag cannot be removed and the account will always have a red flag.

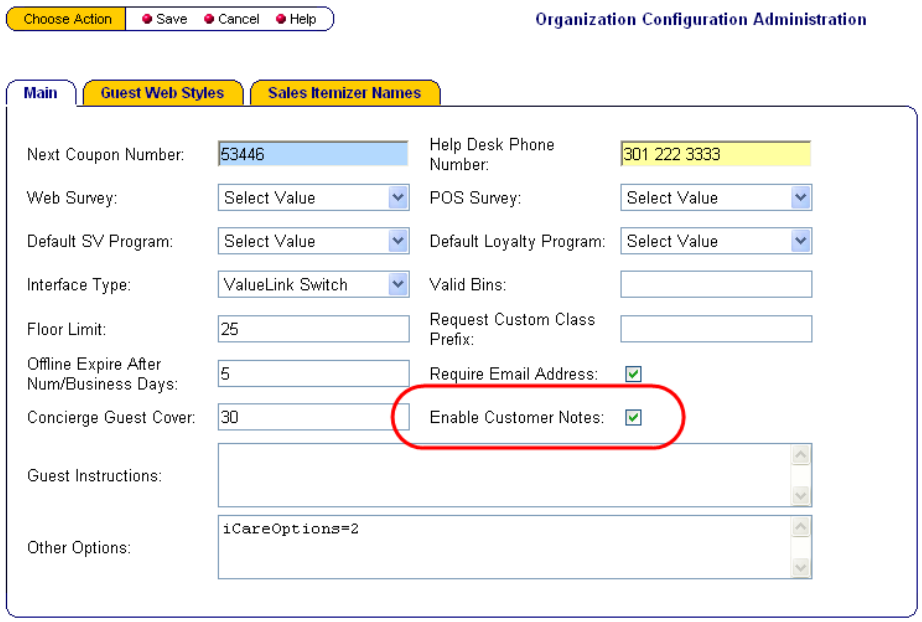
In order to take advantage of the entire feature, the following steps must be fulfilled:

1. Enable the Customer Notes feature
2. Set up acceptable Customer Note categories
3. Enable the Red Flag Privilege option (optional)
4. View/Add Customer Notes

ENABLE CUSTOMER NOTES FEATURE

1. Navigate to iCare Admin | iCare Config | Initial iCare GPL Setup and Configuration | Organization Configuration

2. Check the option bit Enable Customer Notes

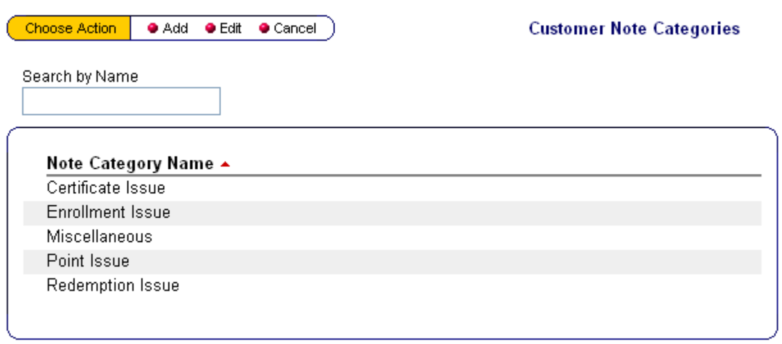


3. Save

CREATE CUSTOMER NOTE CATEGORIES

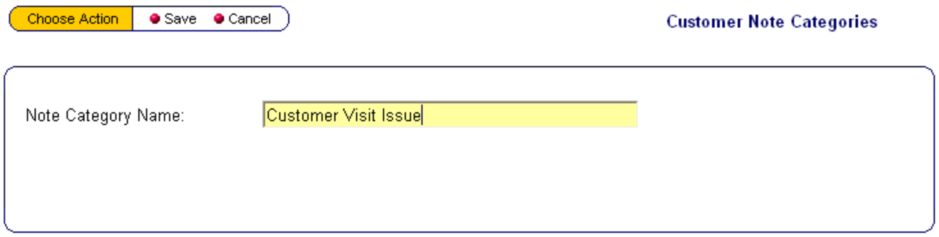
Before actual notes can be created and assigned to accounts, note categories must be created. This helps to classify and organize customer notes better. Note categories can be determined by anything an organization decides. These categories are also configured in the Initial iCare GPL Setup and Configuration section of the iCare application and can be configured at the same time the organization is configured to use the Customer Notes feature. To create/edit a note category:

1. Navigate to iCare Admin | iCare Config | Initial iCare GPL Setup and Configuration | Customer Note Categories



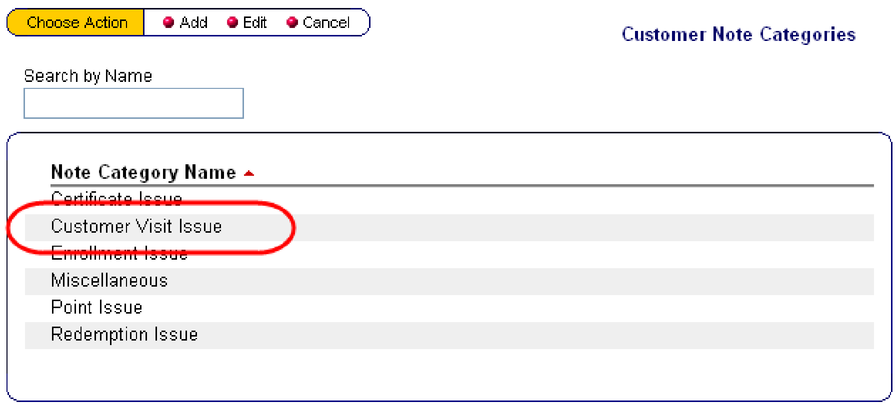
2. Click Add from the top menu bar

3. Enter the name of the new Customer Note Category in the field provided



4. Save

The newly added Customer Note Category will be available from the overview page:



SET RED FLAG PRIVILEGES

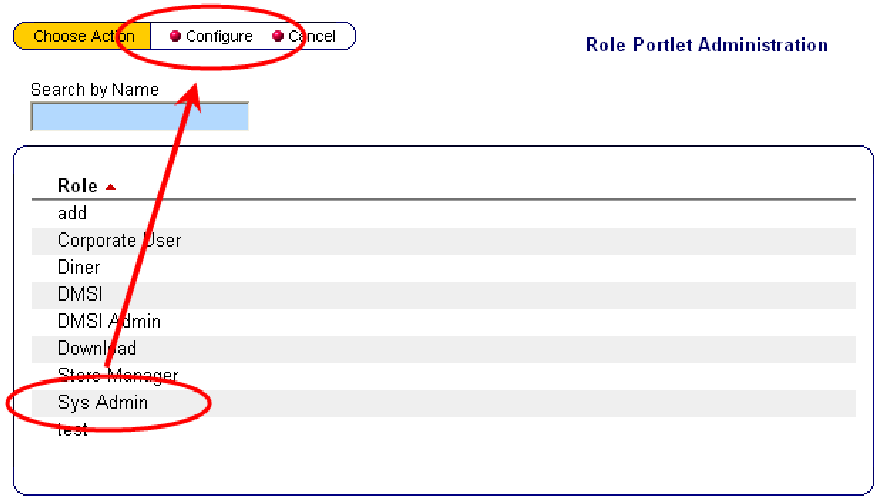
Privileged users may have the ability to assign a red flag to a customer notes. Red flags imply some issue with the account, not necessarily good or bad. The red flag significance is determined by the organization.Once a red flag is assigned, it cannot be removed and the account will forever have a red flag associated with it.

The following steps will typically be carried out by your System Administrator or a member of the mymicros Implementation Group

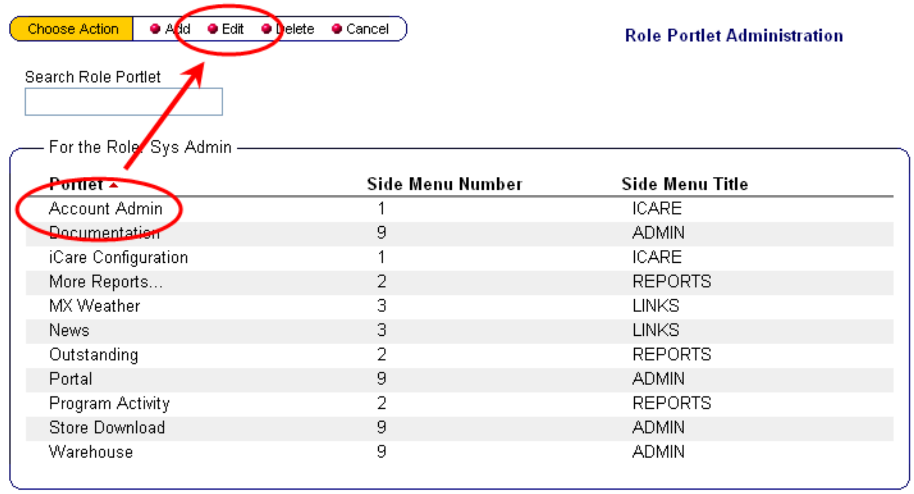
Enable the Red Flag Privilege

1. Navigate to Admin | Portal | Roles | Portlets

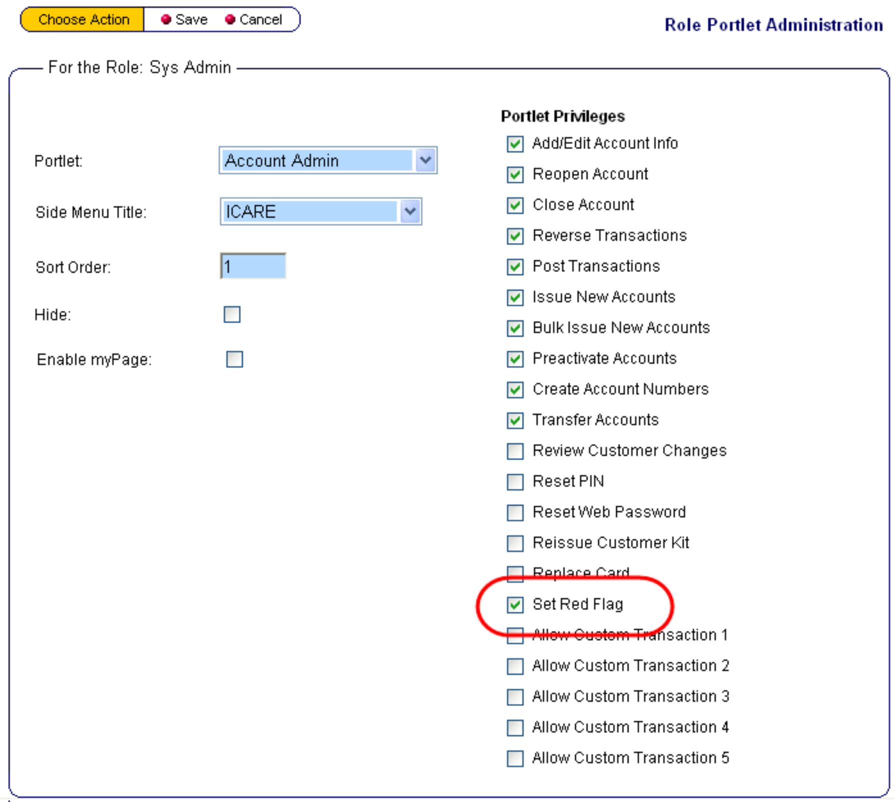
2. Select a user or user roles for whom the Red Flag privilege will be enabled and click Configure from the top menu bar



3. Select Account Admin and click Edit from the top menu bar



4. Enable the option bit Set Red Flag



5. Save

View/Add Customer Notes

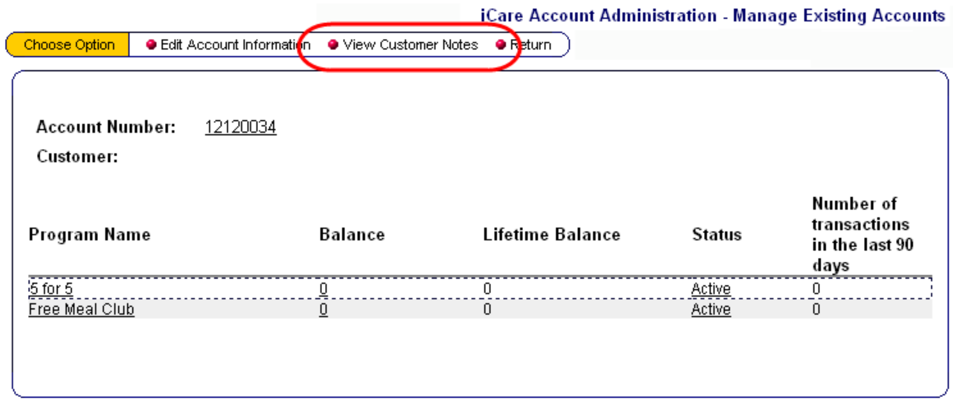
The iCard Customer Note feature allows an account administrator to associate notes with an account to keep track of any issues that may arise. Notes can be categorized by any classification the organization decides upon. New note categories can be added and existing categories can be modified.

Privileged users may have the ability to assigned a red flag to customer notes. Red flags imply some issue with the account. The red flag significance is determined by the organization. Please note, once a red flag is assigned, it cannot be removed and the account will forever have a red flag associated with it.

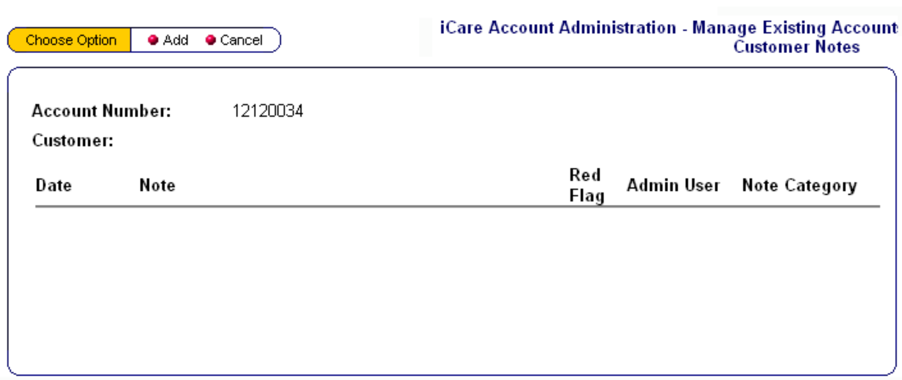
View/Add Customer Note

1. Navigate to iCare Admin | Account Admin | Manage Existing Accounts
2. Search for and select the account to have a note added to it

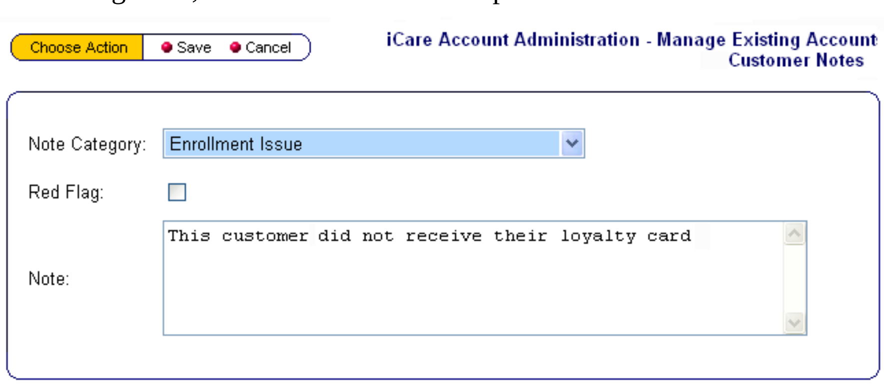
3. Select View Customer Note from the top menu bar of the Manage Existing Accounts page



The View Notes page will appear:



4. To add a note, click Add from the top menu bar
5. Select a Note Category from the drop-down list, specify whether or not the note is a red flag issue, and then enter the description of the issue in the text box:



6. Save

Multiple Loyalty Programs

The ability to have more than one loyalty program on one card is now possible through iCare. Previously, users were restricted to only one loyalty program and one payment (gift) card per card. This is no longer the case. MICROS has enhanced this feature to allow for multiple loyalty programs to be used simultaneously, allowing account holders the convenience of only needing one card.

For example, organizations may choose to have one card reflect (1) a gift card, (2) a points earning loyalty program which awards a free appetizer when established thresholds are met, and (3) a buy 10 “To Go Coffees” and get one free to go coffee.

Using the card programs outlined above, if a customer dines at a restaurant and orders appetizers, entrees, and dessert, then, when the cashier swipes the loyalty card, the POS will automatically assign the appropriate points to both the loyalty program and the free coffee program. Since the customer did not purchase a to-go coffee, the system will recognize this and assign the points only to the loyalty program. However, if this same customer visits the restaurant the following day and purchases a medium drip coffee to go, when the card is swiped at the POS, the POS will assign the points to the Free Coffee program.

Note	*At this time, multiple loyalty programs on one card rule is only available for iCards.* ***Foreign cards are not supported.***

Configuration & Requirements

There are a number of configuration steps that must take place as well as system requirements that must exist in order for this feature to operate successfully.

Note	*The following instructions are meant as a generic guideline for setting up programs. Ultimately, an organization’s needs may determine the parameters for a number of these settings.* *Please feel free to contact the myMicros Implementation Group should any questions arise.*

SVC Requirements

This feature requires SVC Version 6, build SVC V2.5.0.165.zip.

If the feature is enabled but the SVC Interface has not been upgraded, the server will ignore the feature and process one loyalty program as usual. During the processing, iCare server will write the following error message in the Micros.log file:

```
The current SVC version is XX, the SVC version needs to
be upgraded to V2.5.0.165 or later in order for the
'Multiple loyalty programs per card' feature to be
usable.
```

POS Configuration

If, at the POS, when multiple discount awards are issued at the same transaction, the error “No Sales To Discount” displays, the POS must be configured.

Note	*No errors/error messages will generate if discounts are issued separately.* *This is only for same transaction discounts.*

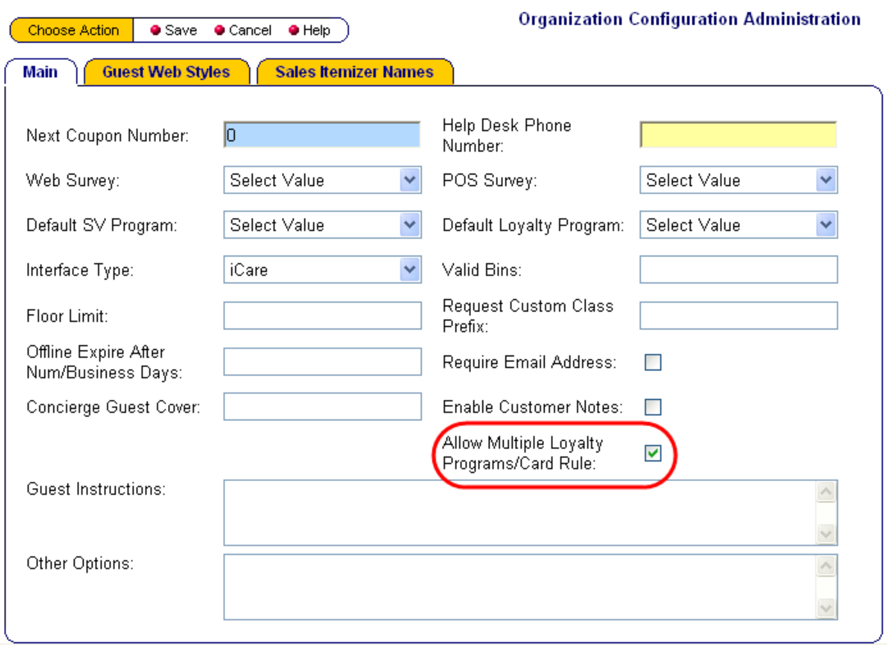
To configure the POS:

1. Access the Configuration Panel and navigate to the Discount/Service | Options Tab
2. For each of the discounts, ensure the following:
   a. Make sure the reset-itemizers option is *not* checked
   b. Check all the “Itemizer 1 - 8” options under “Apply to Discount”

Enable Multiple Loyalty Programs per Card

For the iCare system to recognizes multiple loyalty programs, the feature must be “turned on” for the organization.

1. Login as Sys Admin
2. Navigate to iCare Admin | Initial iCare Setup and Configuration | Organization Configuration
3. Enable the Allow Multiple Loyalty Programs/Card Rule option bit:

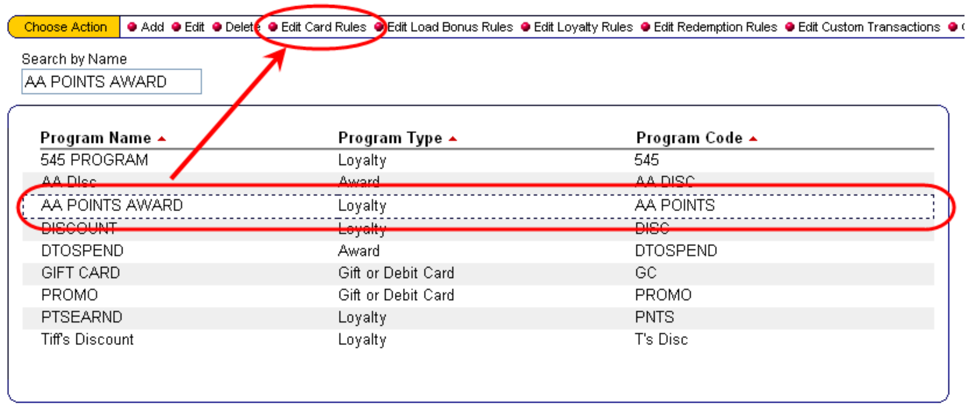


4. Save

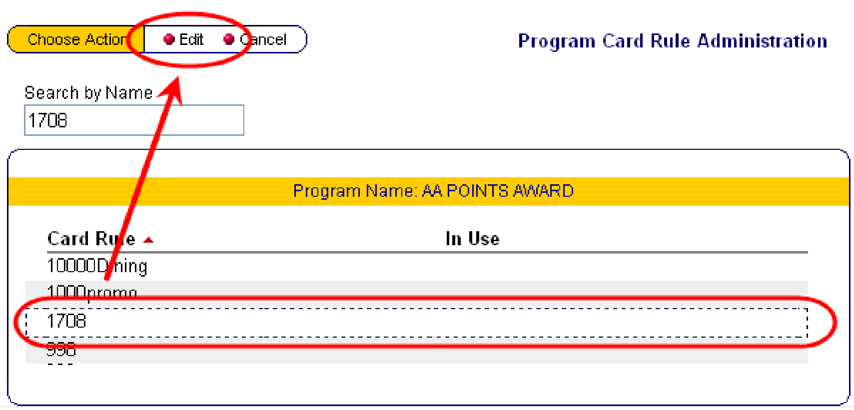
Link Multiple Loyalty Programs to One Card Rule

Since the fundamental idea of this feature is to have one card acting as a universal card, it is necessary to link every loyalty program that will be one that one card to that solitary card rule. If loyalty programs have not already been established, do so now. The following is instructions on how to link the existing programs to the appropriate card rule:

1. Login as Sys Admin
2. Navigate to iCare Admin | Programs, Cards, Coupons, and Rules | Programs
3. Select the loyalty program and click Edit Card Rules



4. Select the appropriate card rule and click Edit



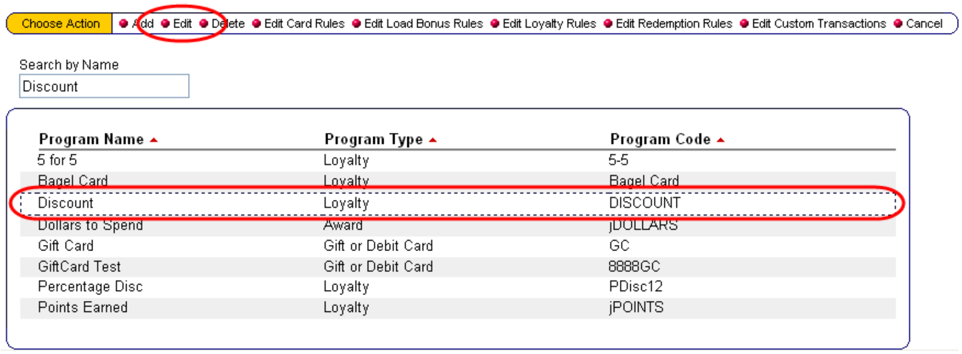
5. Assign the card rule to all or some of the locations and click Save
6. Repeat steps 3 - 5 for all loyalty rules to be used as part of the multiple loyalty program feature

LINK THE AWARD RULE(S)

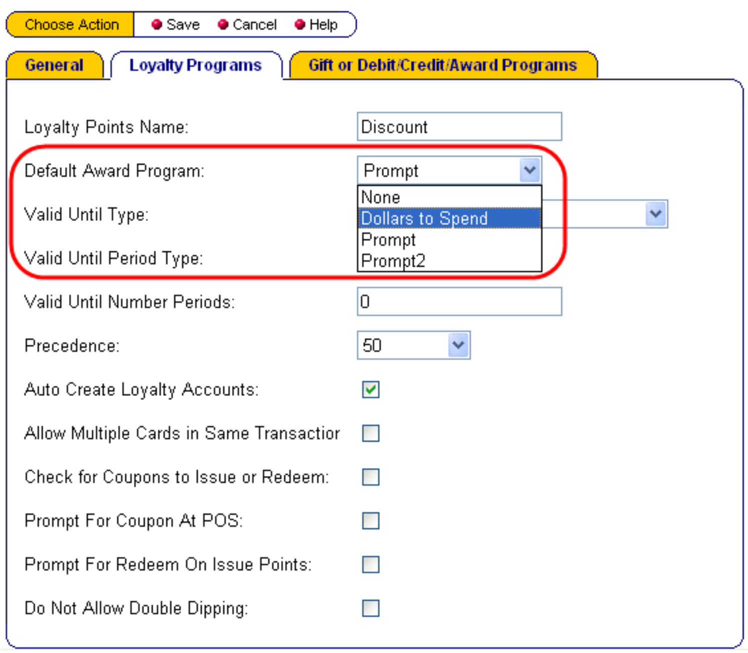
Each loyalty rule should have a Point Award Rule that specifies the type of award the account holder is eligible to receive per program. Award Rules may be linked to the Loyalty Program or Award Programs may be linked to Card Rules. You may choose either or both methods.

To link the Award Rule to the Loyalty Program:

1. Login as Sys Admin
2. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Programs
3. Select a Loyalty Program and click Edit



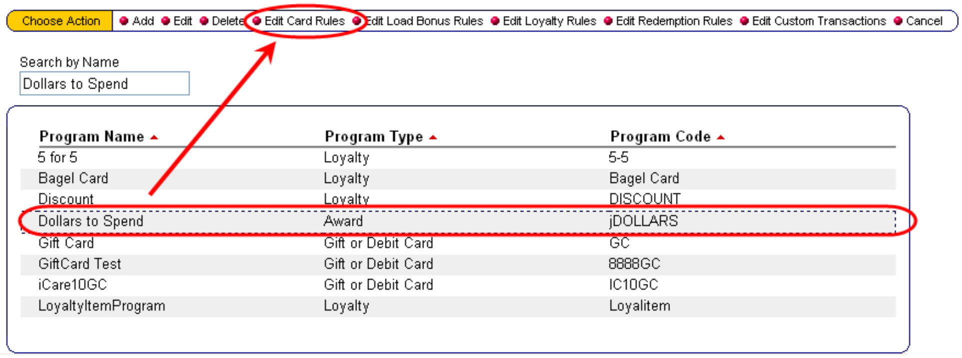
4. On the Loyalty Programs Tab, specify a Default Award Program



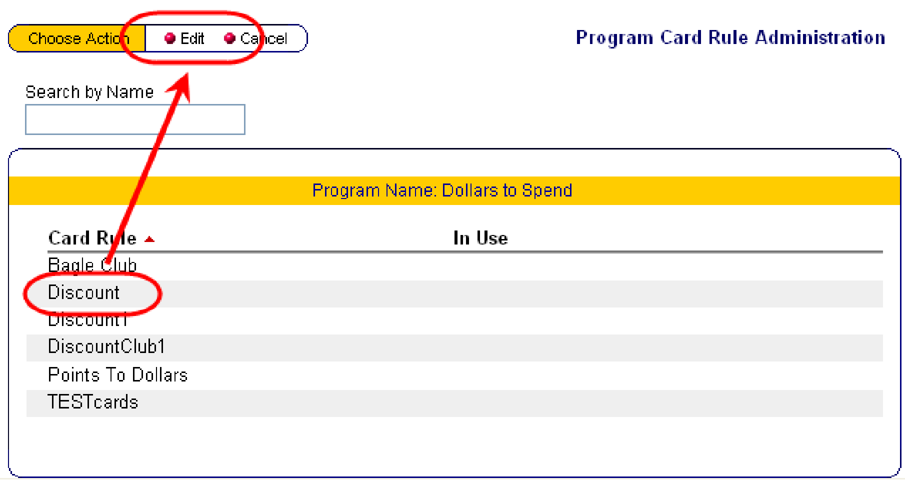
5. Save

To link the Award Program to the Card Rule:

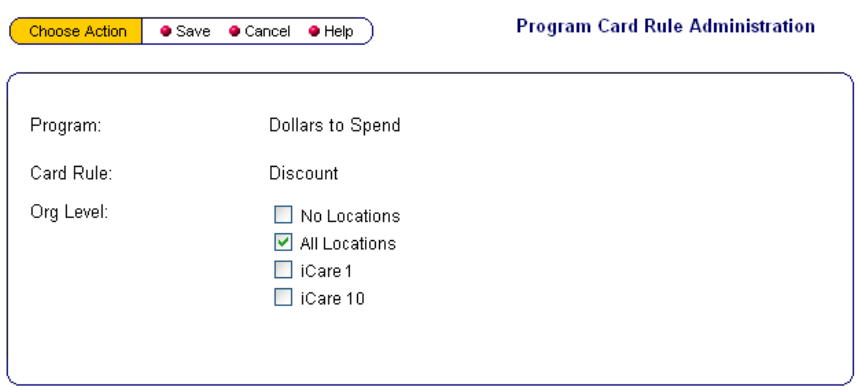
1. Login as Sys Admin
2. Navigate to iCare Admin | Programs, Cards, Coupons, and Rules | Programs
3. Select the Award Program and click Edit Card Rules



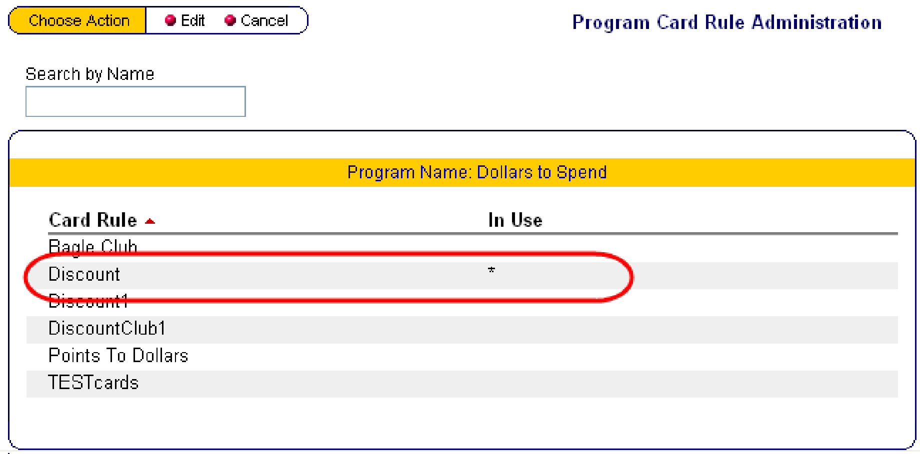
4. Select the Card Rule to be linked and click Edit



5. Select All Locations or specify individual locations and click Save



The card rule will now be “In Use”



Link All Loyalty Rules to Loyalty Programs

You will need to, as with any loyalty program configuration, ensure that the loyalty programs have at least two loyalty rules assigned (one for point issuance; the other for award issuance). These rules dictate how points will be accrued. The Point Award Rules dictate how the awards are earned. So, if you have three loyalty programs, you will need to have at least six loyalty rules: three point issue loyalty rules and three loyalty award rules.

Spend or Lose Program

Manage multiple stored value functions co-existing on one card/card program using the Spend-or-Lose Program. iCare now supports an automatic issue function, as well as traditional gift card functionality. This feature combines two methods of earning/adding balance to one card program. The first method is the standard gift card issue/reload behavior. The second method is a predetermined amount that is credited to the card at defined intervals; the amount that is not used or redeemed will not be available at the end of the period. The allowance will automatically re-credit the account the first time the card program is used at the POS after the interval begins again. This method is referred to as “Spend or Lose”. It may also be referred to as the Employee Meal Card.

Standard Gift Card

Standard gift card issue/reload behavior refers to the typical manner in which gift cards are used. Typically, a gift card is issued for an amount, like $25. Then, the gift card is redeemed for an amount, for example $20. This would leave balance of $5 on the card. This balance can be applied to a future transaction, or the customer can decide to add more value to the card and purchase additional value, like $35 more dollars. Now, the gift card balance is $40.

Note	*The Allow Reload option must be enabled in order for reloading capabilities to be available for a card program.*

Spend or Lose Program

A pre-defined allowance is often implemented in the situation of employee meal cards. Many organizations that use employee meal cards load a set balance at period intervals and quite often this practice is seen in corporate cafeterias. For instance, an amount $25 can be credited to the card in the beginning of the week of $25. Then, every week, the employee has up to $25 to spend in the cafeteria. The employee can use all $25 in one transaction, or he/she can spend it over the course of the time period. It is up to the discretion of the account holder how the balance will be spent.

The automatic allowance is issued upon the first request of a new period. If, as in the example above, the weekly allowance is $25, then the $25 is not present on the account until the card is swiped at the POS. The POS recognizes that the card swiped is part of the Employee Meal program, and immediately credits the account with $25. Throughout the week, the balance will be decremented based on the usage of the card. When the balance of the automatic allowance reaches zero, the amount the employee has voluntarily loaded to the card will cover any additional charges.

When the account holder exhausts the balance of the automatic allowance and begins using funds from the other bucket, there will be no “prompt” or alert generated at the POS. If, when performing a redemption transaction, the balance of the automatic allowance reaches zero, redeeming the remaining balance will be seamless and automatic. This speeds up transaction time at the POS.

Note	*This feature is available as an add-on feature to existing gift card functionality. If this feature is added on to an existing gift card program, then the feature will become active that day.*

FREQUENCY

Organizations can select the frequency at which the automatic allowance will credit the account. Allowances can be credited daily, weekly, or monthly.

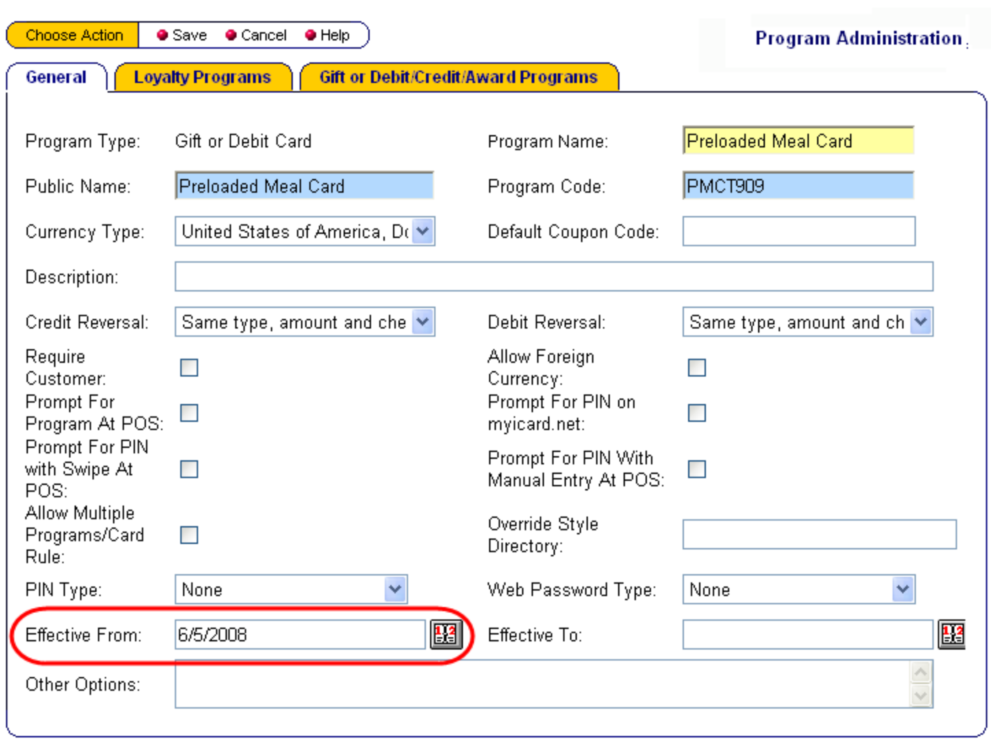
For daily, Spend or Lose starts immediately on the day it is enabled. This means that the day the program is configured is the day the cards will be credited.

For weekly, Spend or Lose starts on the day of week specified. This mean that the day specified will act as the “reset” day. For example, if the Start Day is set to Sunday, any unused balance through Saturday will be removed and the amount will be reset to the specified allowance on Sunday.

For monthly, Spend or Lose starts on the first day of the current month. This means that if the program is configured in the middle of the month, the cards will be credited with the automatic allowance since the program starts on the current month. To avoid this automatic allowance, establish an Effective From date for a future month or only issue cards on the first day of the month.

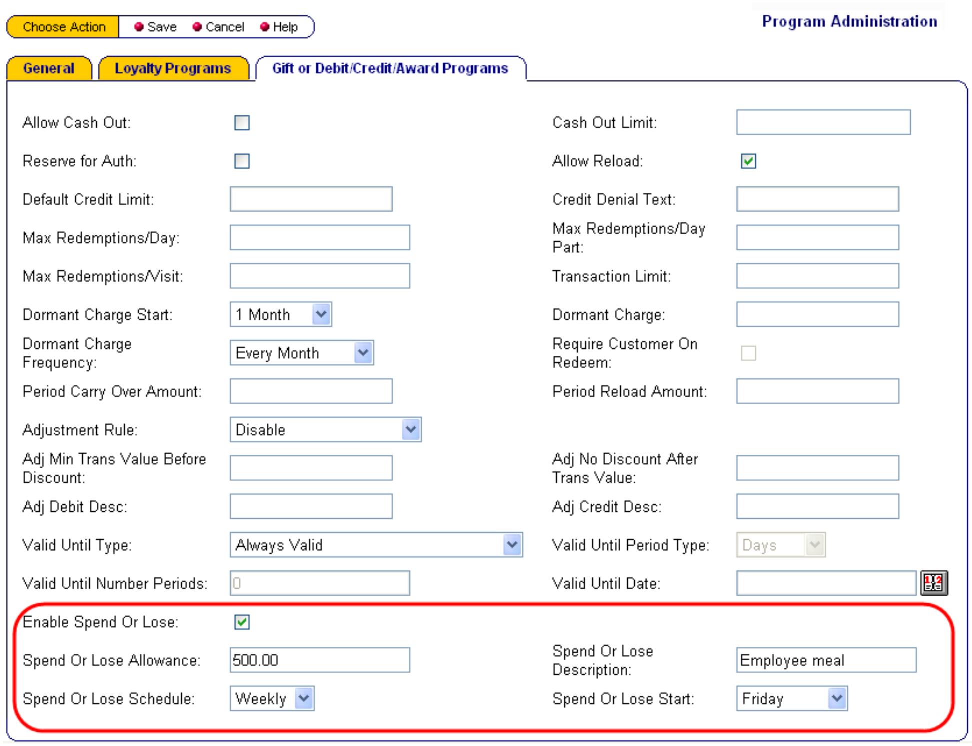
Best Practice

As a best practice, MICROS recommends always setting an effectivity date for a gift card program using the Spend or Lose functionality. This helps to reduce the amount of unintentional gift card credits. Program effectivity may be set within the Program Configuration. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules. Select the Spend or Lose gift card program. On the General Tab, set the Effective From field to an appropriate date:



Screen Overview & Configuration

In order to implement this feature, you will be required to set up a gift card program with the Spend It or Lose It configurations. To support this feature, some new fields have been added to the bottom of the Gift or Debit/Credit/Awards Programs Tab in the iCare Config screen:



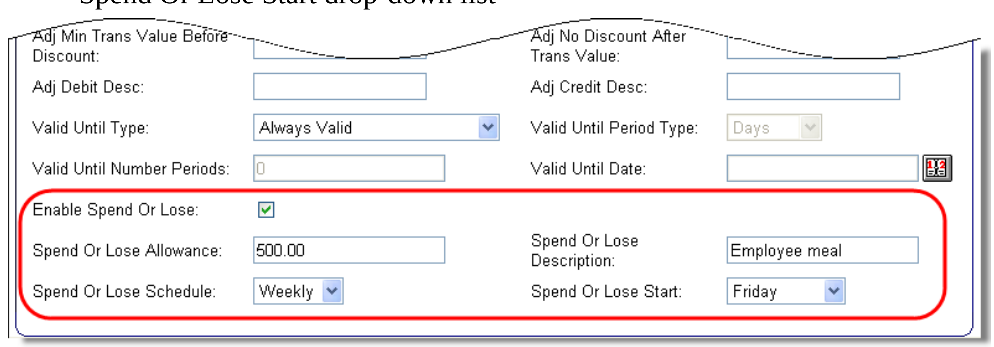
Note *The fields described in this section have previously been described on page 107.*

Field	Description
Enable Spend Or Lose	Enable this option if the card program will support the Spend or Lose functionality Fore more information on the Spend or Lose functionality, please refer to the Spend or Lose Program document.
Spend Or Lose Allowance	Enter the amount by which the card will be “reset” at defined intervals for the Spend or Lose functionality
Spend Or Lose Description	Enter a brief description for the Spend or Lose behavior for the card program

Field	Description
Spend Or Lose Schedule	Specify the intervals at which the Spend or Lose functionality will “reset” Options include: ◆ Daily ◆ Weekly ◆ Monthly
Spend Or Lose Start	If Weekly is defined as the Spend Or Lose Schedule, you will be required to specify the day of the week for the “allowance reset” (Monday, Tuesday, Wednesday, etc.)

Configure the Spend-or-Lose Gift Program

1. Login as Sys Admin
2. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Programs | Add
3. On the General Tab, specify the Program Type as Gift or Debit Card and enter Program Name, Public Name, Program Code, and Credit/Debit Reversal parameters, and an Effective From date
4. On the Gift or Debit/Credit/Award Programs Tab, enable the Allow Reload option as well as the information listed below (refer to Field Description table above for more information):
   1. Enable the Enable Spend Or Lose
   2. Specify the amount in the Spend Or Lose Allowance field
   3. Enter a description in the Spend Or Lose Description field
   4. Specify frequency using the Spend Or Lose Schedule drop-down list
   5. If you have selected Weekly as the schedule, specify the start day in the Spend Or Lose Start drop-down list



5. Save