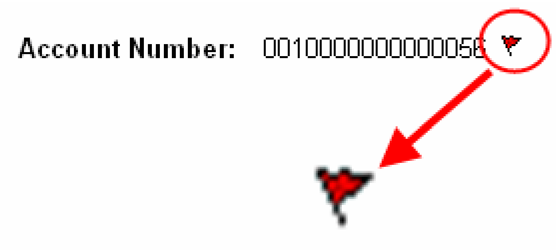
iCare
Customer Notes

Customer Notes

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.



Two new database tables were created to support the Customer Notes feature:

1. iCare Customer Note Category
2. iCare Customer Note

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.

The following information details the instructions for:

- Enabling the customer notes,
- Creating customer note categories,
- Enabling the red flag privilege, and
- Adding/Viewing customer notes.

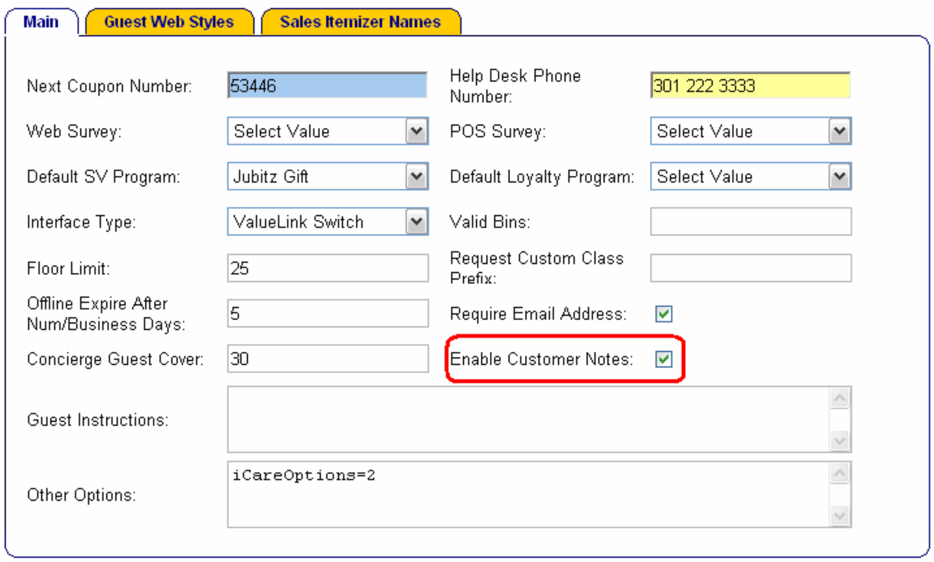
Enabling the functionality, creating note categories, and enabling the red flag privilege are, for the most part, one-time configurations. You may find it necessary to create new note categories periodically. However, MICROS recommends creating most categories initially and creating a category entitled “Miscellaneous” or “Other” to classify any notes that may not necessary fall within the parameters of an otherwise specified category. Since these are one-time configurations, they are recommended to be carried out by a System Administrator or someone of similar privilege class.

Adding and/or viewing notes will take place on a more frequent basis. Since this is most likely the case, it is recommended that customer note addition/viewing be made available to more users. However, this is not a requirement, and it is entirely up to the organization’s discretion which users will be able to view and assign customer notes.

Configure the Organization for Customer Notes

The ability to use the Customer Notes feature must be set up on an organizational level in the Initial iCare GPL Setup and Configuration section of the iCare application. To enable the customer notes feature:

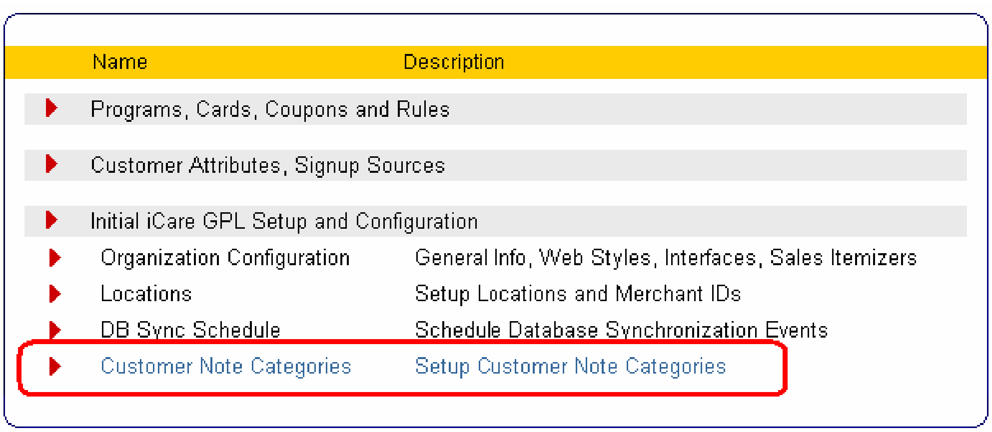
1. Login as Sys Admin
2. Navigate to iCare Admin | iCare Configuration | Initial iCare GPL Setup and Configuration | Organization Configuration
3. Select the check box for Enable Customer Notes and click Save:



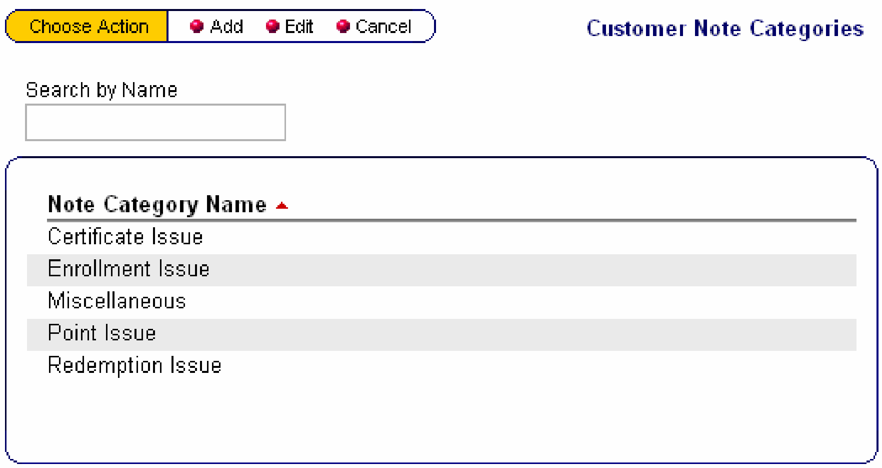
Note Categories

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:

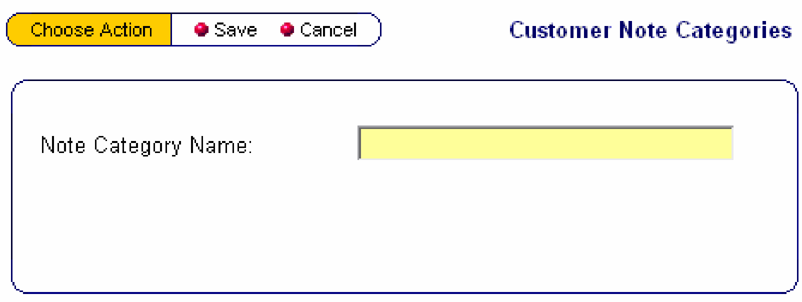
1. Login as Sys Admin
2. Navigate to iCare Admin | iCare Configuration | Initial iCare GPL Setup & Configuration | Customer Note Categories



3. Select Add (or select existing Customer Note and click Edit)



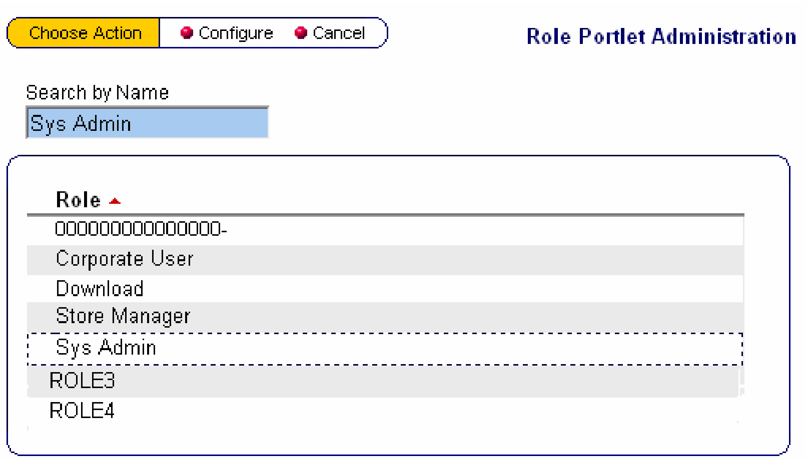
4. Enter/Modify the name of the Customer Note and click Save:



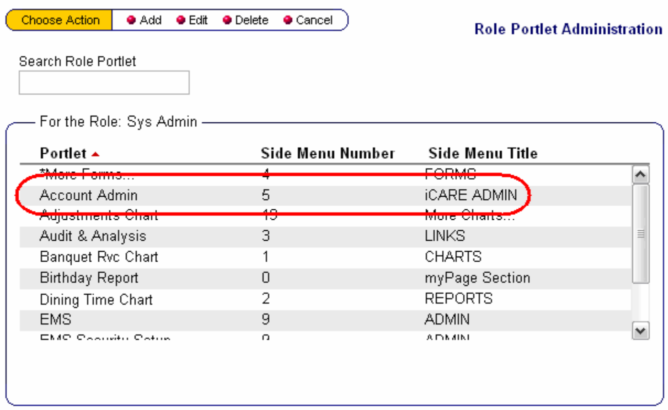
Red Flag Privilege

The Red Flag privilege must be set for a user (or user role) before that user can assign a red flag to any customer note. To enable the Red Flag privilege:

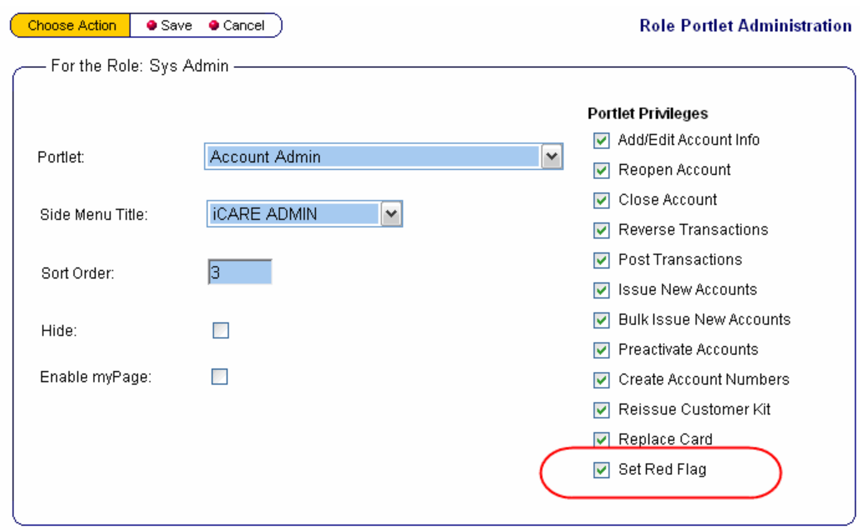
1. Login as Sys Admin
2. Navigate to Admin | Portal | Roles | Portlets
3. Select a user who will have the Set Red Flag privilege enabled (or disabled) and click Configure from the top menu bar:



4. Select Account Admin and click Edit:

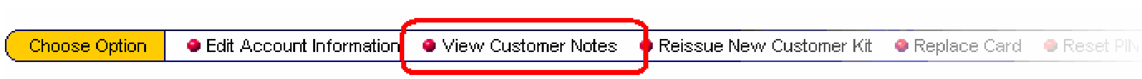


5. Enable (or disable) the option bit Set Red Flag and click Save:

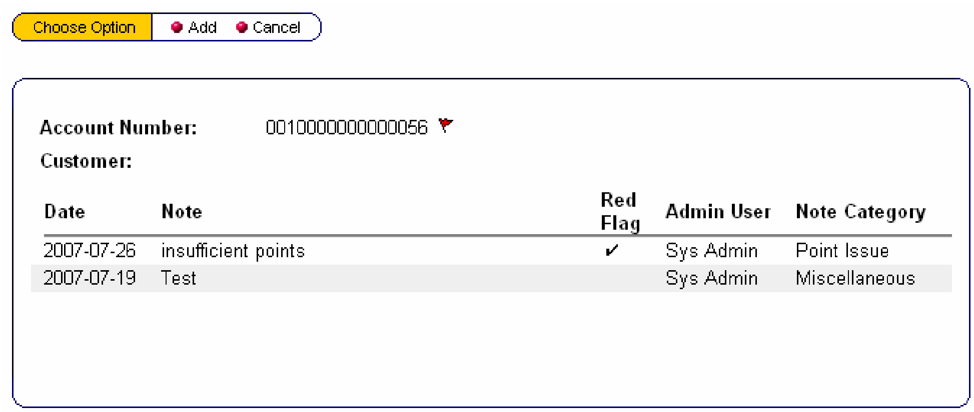


Add/View Customer Notes:

1. Login as Sys Admin
2. Navigate to iCare Admin | Manage Existing Accounts
3. Search for and select the account you wish to add a note to
4. Select View Customer Note from the top bar menu of the Manage Existing Accounts Page:

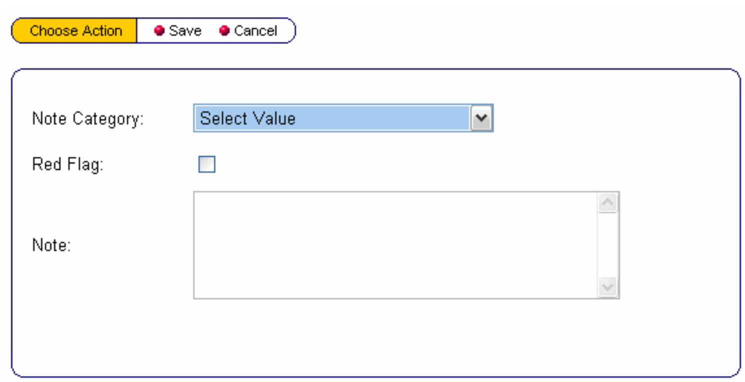


You will be taken to the View Notes page where you can view existing notes or add new customer notes:



- Date - shows the date the note was created
- Note - shows the content of the note
- Red Flag - shows whether the issue note has been red flagged (see Red Flag Privilege above)
- Admin User - shows the individual who entered the note
- Note Category - shows the note category

5. To add a note, click Add from the top bar menu
6. 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



7. Click Save