



# Concierge Setup Instructions

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## Concierge Setup Instructions

The Concierge feature was developed as another method of assigning points to customers. When a customer dines at an establishment, points are assigned based on the number of guests with that diner.

For Example, David is enrolled in the Concierge program. If David brings three people to eat with him, a pre-determined number of points will be issued to David's account based on the total number of guests. If an organization determines that 5 points will be issued for each guest on the check, then David would receive 20 points; 5 for himself and 15 for his guests.

Concierge Points will be able to post by Location, Business Date and/or Check Number. The number of points will be awarded based on the following rules.

1. Points per check - points are configurable by the organization
2. Points are only applicable on accounts marked with the Concierge flag
3. Points are adjustable, both globally and locally
4. Points are issued along with the regular points issued on the check
5. Only one concierge points issue per check

Several steps are required to configure the Concierge feature:

1. The number of points issued per guest on the check must be determined
2. The Custom Transaction must be enabled for the Organization
3. The Loyalty Program must be setup to have a Custom Transaction called Concierge
4. Individual accounts must be flagged as Concierge

### **Configure the Number of Points Issued**

A one time configuration must take place to determine the number of points issued per guest on the check when the Concierge feature is used. To configure the number of points issued per guest on a check:

1. Login as Sys Admin
2. Navigate to iCare | iCare Configuration | Initial iCare GPL Setup and Configuration | Organization Configuration
3. Enter the number of points to be issued per guest on the **Concierge Guest Cover** field

Main Guest Web Styles Sales Itemizer Names

Next Coupon Number: 53446      Help Desk Phone Number: 301 222 3333  
 Web Survey: Select Value      POS Survey: Select Value  
 Default SV Program: Jubitz Gift      Default Loyalty Program: Select Value  
 Interface Type: ValueLink Switch      Valid Bins:   
 Floor Limit: 4      Request Custom Class Prefix:   
 Offline Expire After Num/Business Days: 5      Require Email Address:   
**Concierge Guest Cover: 30**  
 Guest Instructions:   
 Other Options: iCareOptions=2

4. Save

### Enable Custom Transactions for the Organization

The organization must allow for custom transactions. The Concierge feature will not function without this step. To enable custom transactions for the organization:

1. Login as Sys Admin
2. Navigate to Admin | Portal | Roles | Portlets
3. Select Sys Admin and select Configure
4. Select Account Admin from the Portlet list and click Edit
5. Enable the **Allow Custom Transaction** that will be used for Concierge; 1, 2, 3, 4, or 5. All Custom Transactions can be enabled, even if they are not used.

For the Role: Sys Admin

Portlet: Account Admin  
 Side Menu Title: iCARE ADMIN  
 Sort Order: 3  
 Hide:   
 Enable myPage:

**Portlet Privileges**

- Add/Edit Account Info
- Reopen Account
- Close Account
- Reverse Transactions
- Post Transactions
- Issue New Accounts
- Bulk Issue New Accounts
- Preactivate Accounts
- Create Account Numbers
- Transfer Accounts
- Review Customer Changes
- Reset PIN
- Reset Web Password
- Reissue Customer Kit
- Replace Card
- Allow Custom Transaction 1
- Allow Custom Transaction 2
- Allow Custom Transaction 3
- Allow Custom Transaction 4
- Allow Custom Transaction 5

6. Select Save from the top menu bar

### Setup Concierge as Custom Transaction for Selected Loyalty Program

1. Login as Sys Admin (if not currently logged in)
2. Navigate to iCare | iCare Configuration | Programs, Cards, Coupons, and Rules | Programs
3. Select the program that will use the Concierge feature
4. Select Edit Custom Transaction from the top menu bar
5. When the page refreshes, click Add from the top menu bar
6. Select Concierge from the drop-down list
7. Select the Number from the drop-down list. This number corresponds to the Custom Transaction that was enabled in the previous step.

Program: Coupon Test

Custom Transaction:   
Select Value   
Select Value   
Concierge   
Meeting Planner   
Redeem Points   
Corporate Redeem Points   
Post Check   
Post Check (with Meeting Planner)

7. Click Save in the top menu bar

The Custom Transaction Concierge will be saved for the selected Loyalty Program.

### Enable Concierge Transaction for an Individual Account

1. Login as Sys Admin (if not currently logged in)
2. Navigate to iCare | Account Administration | Manage Existing Accounts
3. Locate the account for which the Concierge program will be applied
4. Select the Account and click Edit Account Information from the top menu bar
5. Enable the Concierge feature

001000000001002

First Name   
Last Name   
Home Phone   
Work Phone   
Mobile Phone   
Email Address   
Birth Date   
PIN   
Visits   
Address Line 1   
Address Line 2   
City   
State/Province   
County/Region   
ZIP/Postal Code   
Country   
Favorite   
Signup Source   
Contact via Email   
Contact via Mail   
Contact via Phone   
Anniversery Date   
Never Expire   
Meeting Planner   
Concierge   
Gender   
Additional Info 1   
Additional Info 2   
Additional Info 3   
Additional Info 4

6. Click Save

## Concierge Report

A new custom report for tracking the application and accrual of Concierge Points has been created. To assign this report to the appropriate Role:

1. Login as Sys Admin
2. Navigate to Admin | Warehouse | Reports | Portal Reports
3. Select the Concierge Report and click Add
4. Assign the Report to the appropriate Role
  - a. Navigate to Admin | Warehouse | Reports | Role Reports
  - b. Select the Role that will use the report
  - c. Select the Concierge Report and click Add

The report will now be available under the Reports Section.

The Concierge Report:

Posting Concierge Awards Report										
Location	First Name	Last Name	Account Number	Count	Event Date	Check Number	Admin User	Eligible Total	Points Issued	Posted Date
iCare 7				3				25.00	25	
iCare 7				3				25.00	25	
	Justin	Delia	#89890001			1490	Sys Admin	10.00	10	3/7/2007
	Josh	McDermott	#89890007			1494	Sys Admin	5.00	5	3/7/2007
	Stacey	Morrison	#89890005			1492	Sys Admin	10.00	10	3/7/2007

The report contains the following information:

- Location Name
- Member First Name
- Member Last Name
- Account Number
- Count - this is the number of guests on the check
- Event Date
- Check Number
- Admin User
- Eligible Total
- Points Issued
- Posted Date