

## iCare Discount Card with Registration Set-up

**\*\*\*This is an example of how to setup a Discount Card, i.e. each time the card is swiped a predefined percentage is taken off the check. The customer will only get the discount after the registration at the myicare web site. \*\*\***

NOTE- All Options that are not referenced to do NOT pertain to the Discount Card program. Also, all options that are left blank will not adversely affect the Discount Card program.

### CARD RULE:

#### If card numbers were issued by the mymicros group

- Rule Name: CARD 'input program number' | ex. CARD 1234
- Is this an iCard? Check option bit
- Enter the 'iCard Program Number,' which are digits 2- 5 of the full card number (Ex. Card Number- 0123400000000010, Program# = 1234)
- SAVE

Rule Name:	<input type="text" value="With_registration"/>
Is this an iCard?:	<input type="checkbox"/>
iCard Program Number:	<input type="text"/>
Check Digit Type:	<input type="text" value="Do Not Test for Check Digit"/>
Foreign Card Preamble:	<input type="text" value="3535"/>
Foreign Card Length:	<input type="text" value="6"/>
Foreign Card Denomination:	<input type="text"/>
Starting Account Number:	<input type="text"/>
Ending Account Number:	<input type="text"/>
Effective From:	<input type="text"/>
Effective To:	<input type="text"/>

#### If the card numbers are Pre-existing 'Foreign' cards, then the card schematic from the card producer is needed

- Enter the 'Check Digit Type' if the card has a check digit
- Enter the 'Foreign Card Preamble,' which is similar to the program number (see the card schematic for the preamble)
- Enter the 'Foreign Card Length'
- Enter the 'Foreign Card Denomination' if cards are pre-denominated
- SAVE

## PROGRAM:

ADD a program 'Discount with Registration'

### GENERAL Tab

- PROGRAM TYPE: Loyalty
- Program Name, Description and Public Name: 'your choice'
- Program Code: 'your choice'
- Currency Type: 'your currency'
- CREDIT and DEBIT REVERSAL: Same type, amount and check
- Mark 'Require Customer'

General	Loyalty Programs	Gift or Debit/Credit/Award Programs
Program Type:	Loyalty	Program Name: Register 3%
Public Name:	Register 3%	Program Code: MP3
Currency Type:	Euro Member Countries	Default Coupon Code:
Description:		
Credit Reversal:	Same type, amount and	Debit Reversal: Same type, amount and
Require Customer:	<input checked="" type="checkbox"/>	Allow Foreign Currency: <input type="checkbox"/>
Prompt For Program At POS:	<input type="checkbox"/>	Prompt For PIN on myicard.net: <input type="checkbox"/>
Prompt For PIN with Swipe At POS:	<input type="checkbox"/>	Prompt For PIN With Manual Entry At POS: <input type="checkbox"/>
Allow Multiple Programs/Card Rule:	<input type="checkbox"/>	Override Style Directory:
PIN Type:	None	Web Password Type: None
Effective From:		Effective To:
Other Options:		

### LOYALTY Tab:

- Loyalty Points Name: Points
- DEFAULT AWARD PROGRAM : none
- VALID UNTIL TYPE: Never reset points
- Check 'Auto Create Loyalty Account'
- Do NOT check 'Check for Coupons to Issue or Redeem'
- SAVE

General Loyalty Programs Gift or Debit/Credit/Award Programs

Loyalty Points Name:

Default Award Program:

Valid Until Type:

Valid Until Period Type:

Valid Until Number Periods:

Precedence:

Auto Create Loyalty Accounts:

Allow Multiple Cards in Same Transaction:

Check for Coupons to Issue or Redeem:

Prompt For Coupon At POS:

Prompt For Redeem On Issue Points:

Do Not Allow Double Dipping:

## PROGRAMS | EDIT CARD RULE

Highlight 'Discount Program' and select Edit Card Rule

Select Card Rule created in previous section and choose edit.

Select All Locations

Save

Choose Action Add Edit Delete Edit Card Rules Edit Load Bonus Rules Edit Loyalty Rules Edit Redemption Rules Edit Custom Transactions Cancel

Search by Name

**Choose Card Rule**

Program Name ▲	Program Type ▲	Program Code ▲
545 program	Loyalty	545
Bonus 20%	Loyalty	10
Bonuskarte	Loyalty	Bonus
Carvery Points	Loyalty	3333
CollectPoints	Loyalty	13
Debit	Gift or Debit Card	Payment
Euro	Gift or Debit Card	euro
Euro to Spend	Award	ETS

## ELIGIBILITY:

### [ADD an Eligibility Rule](#)

- RULE TYPE: Use with Loyalty Rule
- Name and Description: Discount Loyal
- SAVE

**Main** **Compos** **Sales Itemizers**

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Rule Type: Use with Loyalty Rule

Name: **Registration required**

Description: for 3 % Discount with Card, after Registration at iCare website

Include Service Charges:  Include Taxes:


Exclude Payment:



Check Min Value:

Item Rule Type: Num Items in Transaction

Item Quantity: 1

Period Type: Use Period End Date Number of Periods:

Period End Date:  

Effective From:   Effective To:  

Other Options:

## LOYALTY RULE: ADD a Loyalty Rule

### [MAIN Tab](#)

- TYPE: Points Award Rule
- Loyalty Rule Name, Public Name, Description: Disc Award
- PRECEDENCE: 100

**Main** **Points** **Awards**

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Type: Points Award Rule

Loyalty Rule Name: **Register| 3%**

Public Name:

Description:

Precedence: 100 (High)

Print Points Until Award:

Points Round To Nearest:

Eligibility Rule: Registration required

## AWARDS Tab

- AWARD TYPE: Issue Immediate Discount
- Award Disc Type: use Percentage of Check Subtotal
- Point Threshold: 0
- Point Cost : 0
- Discount Percentage: 3.00
- SAVE

Main	Points	Awards
Use Points Total:		Point Balance Total
Point Threshold:		0.00
Award Type:		Issue immediate discount
Award Discount Type:		Use Percentage of Check Subtotal
Point Cost:		0.00
Discount & Award Amount:		
Discount Percentage:		3.0
POS Print Text:		
Coupon Code:		
Once Per Year:		<input type="checkbox"/>
Once Per Life Time:		<input type="checkbox"/>
Require Customer Info:		<input checked="" type="checkbox"/>
Cross Point Threshold:		<input type="checkbox"/>

## **PROGRAMS:**

Highlight the 'Discount' Program and select EDIT LOYALTY RULE

- ADD a Loyalty Rule
- Loyalty Rule: 'Register 3%'
- Leave ORG LEVEL and CARD RULE at 'Select Value'
- Save

Program:	Discount Card
Loyalty Rule:	Discount Loyal
Org Level:	Select Value
Card Rule:	Select Value
Effective From:	<input type="text"/> 
Effective To:	<input type="text"/> 

## POS CONFIGURATION:

The following POS buttons should be set-up for this **Loyalty Program**:

### Point Issue

For this program, the following services charges/discounts and tenders should be setup in the **POS Configurator**:

- Point Issue (tender)
- Open Amount Discount (discount)

## Once the installer has send the object numbers, enter them in POS Configuration:

### Point Issue

BoGo Cake	All Org Levels	Cake Disc	Cake Discount	Cake Disc	Discount / 225
Register 3%	All Org Levels	Register 3%	Register 3%		Discount / 225
...	...	...	...	...	...

## POS CONFIGURATION:

- Add a Point Issue, this will be a **discount**
- Use Type: use always
- Description: Name of Award for this program
- POS KEY TYPE: Discount
- POS KEY NUMBER: from POS Configurator
- CARD RULE: Use Card created for this program in first step
- PROGRAM: Award program
- LOYALTY RULE: Award rule for this program
- ORG LEVEL and REVENUE CENTER: All
- Check 'Reconcile with POS'
- SAVE

POS Request Code:	Point Issue	Description:	Register 3%
Use Type:	Use Always	POS Key Number:	225
POS Key Type:	Discount	Min Check Subtotal:	
Default Amount:		Coupon Type:	All Coupon Types
Card Rule:	All Card Rules	Loyalty Rule:	Register 3%
Program:	Register 3%	Revenue Center:	All Revenue Centers
Org Level:	All Org Levels	Do Not Use If a Discount Already on Transaction:	<input type="checkbox"/>
Reconcile with POS:	<input checked="" type="checkbox"/>		
Effective From:			
Effective To:			
Print Reference Entry:			

## DB Synchronization Schedule

This will only work if the necessary syncs have been scheduled correctly.

If the Synch iCare Transactions with LocAct sync and the Sync New iCare Customers with Customer Activity sync are not already configured, set them up to run with frequency set to daily.

- Login as Sys Admin
- Navigate to iCare Admin | iCare Config | Initial iCare Setup and Configuration | DB Synch Schedule | Add

Sync Type:	<input type="text" value="Sync iCare Transactions with LocAct"/>
Server Name:	<input type="text" value="emnpi"/>
Sync Now:	<input type="checkbox"/>
Sync Time:	<input type="text" value="04:00AM"/>
Sync Time Zone:	<input type="text" value="Western European Time"/>
Sync Frequency:	<input type="text" value="Daily"/>
Days of Week:	Sun Mon Tue Wed Thu Fri Sat <input type="button" value="Clear Days"/>
Other Options:	<input type="text"/>
Last Executed:	2008-07-11 13:07:36
Execution Time (ms):	10515
Execution Status:	Success

Second step is to schedule the New iCare customers with the CA DB.

- Login as Sys Admin
- Navigate to iCare Admin | iCare Config | Initial iCare Setup and Configuration | DB Synch Schedule | Add
- Schedule Sync Time after the first synchronisation

Sync Type:	<input type="text" value="Sync New iCare Customers with Customer Activity"/>
Server Name:	<input type="text" value="emnpi"/>
Sync Now:	<input type="checkbox"/>
Sync Time:	<input type="text" value="04:30AM"/>
Sync Time Zone:	<input type="text" value="Western European Time"/>
Sync Frequency:	<input type="text" value="Daily"/>
Days of Week:	Sun Mon Tue Wed Thu Fri Sat <input type="button" value="Clear Days"/>
Other Options:	<input type="text"/>
Last Executed:	2008-07-01 12:16:06
Execution Time (ms):	1640
Execution Status:	Success