

MICROS SYSTEMS, INC.

Partner and Charity Tracking

iCare Configuration Guide

iCare offers Partner tracking for Loyalty and Gift Card programs, also known as Charity tracking. Partner tracking is a feature designed to allow organizations to assign/ link individual accounts to partners or groups for tracking purposes; partners are configurable per organization. For example, an organization may use this feature to strike good will with their customers by ‘giving back’ to local, regional, or national groups, schools, charities, etc. For example, an organization with multiple locations in a region creates 32 partner entries, 30 local schools and 2 national charities. Each customer may choose to be linked to a specific partner so that a portion of money spent can be given back to their selected partner. Another example of using partners tracking is for employee meal cards. Each department may be setup as a partner and each account is linked to the appropriate department.

This feature applies to both stored value programs and loyalty programs and organizations are able to add or update partners as needed. Partner tracking is based on actual spend and the actual number of transactions; it is not based on loyalty point calculations, loyalty rules, or redemption rules of the program(s) associated to a customer.




Note *If the same customer account is on a check more than once, the check value and visit will only be tracked once for that account. An example is a loyalty program that earns stored value. A customer may redeem previously earned stored value, as well as earn points on the same check. The amount spent is only tracked once for their assigned partner.*

Configuration:

Creating Partners for tracking purposes is located under *iCare Configuration | Programs, Card, Coupons, and Rule | Partners*.

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
▶ Stored Value Bonus Rules	Fixed, Percent and Stepped SV Bonus Rules
▶ Programs	Card Program Configuration
▶ POS Configuration	POS Request Codes, Keys and Print Text
▶ Partners	Administer Partners- Ex. Charities, Schools, Etc.
▶ Currency	Administer Currencies & Exchange Rates
▶ Customer Attributes, Signup Sources	
▶ Initial iCare GPL Setup and Configuration	
▶ Standalone Terminal Configuration	

Click 'ADD' to create a new Partner, or highlight an existing Partner and click 'EDIT' to modify that Partner:

Name:	<input type="text" value="Habitat for Humanity"/>
Description:	<input type="text" value="Building a better tomorrow"/>
Effective From:	<input type="text" value="7/21/2010"/> 
Effective To:	<input type="text"/> 
Valid Until Type:	<input type="text" value="Always Valid"/>
Valid Until Period Type:	<input type="text" value="Days"/>
Valid Until Number Periods:	<input type="text" value="0"/>
Valid Until Date:	<input type="text"/> 

Partners must be configured with an 'Effective From' date. However, to accommodate short term or rotating Partners, organizations may optionally configure an 'Effective To' date and/or configure a Valid Until Date. For example, if tracking donations to local schools, organizations may choose to have School Partner tracking occur per school year.

Please note that a customer may only have one active Partner linked to their account at a time. However, if Effectivity dates are used for tracking, a second Partner may be linked to the account, provided the dates do not overlap.

An organization may choose to have a default Partner that all new accounts will automatically be linked to. Setting a default Partner is optional and can be used in conjunction with other non-default Partners, which are Partners that customers would choose to link to their account.

The default Partner would be used in the following scenario: an organization would like all spend for their iCare program(s) to track for a specific Partner, unless the customer chooses to link their account to another supported Partner. For example, '2% of all money spent in a loyalty program will be donated to Habitat for Humanity.'

The default Partner setting can be found in *Initial iCare GPL Setup | Organization Configuration*. Once a default Partner is set, all new accounts will automatically have the default Partner enabled; the default Partner is not retroactive to previously existing accounts. Only one Partner may be set as default for an organization. An organization must deselect a default Partner before selecting a new default.

Partners may be linked to customer accounts through the iCare Account Admin portlet, as well as through the iCare Web Service Interface. Once one or more partners are created, the partner field(s) may be added to the account admin screen through the *iCare Configuration | Customer Attributes, Signup Sources | Customer Fields Display*.

The report for Partner tracking is called the *Partner Tracking Report*. This report provides an easy comparison of Partners and money spent per program, displaying the total number of customers linked to each Partner, as well as the spend of customers during the specified date range. This report applies to both stored value programs and loyalty programs. Organizations can use this report to determine the donation amounts to be provided to each Partner.

The *Partner Tracking Report* will display the following data:

- Loyalty Programs- tracks each transaction and total spend of each transaction
- Gift/ Stored Value Programs- tracks the amount of each Issue/ Activate, Reload, and Redemption transaction

The report displays data per Partner, with each program listed below the Partner and a subtotal line of all transactions and spend. From each program, users may drill down for further details. The total number of customers associated with each Partner is as of the last date of the date range currently being viewed. Also, this count only includes active accounts.

For reporting to occur properly for Partner Tracking, the AGGREGATION sync should be configured to run daily. This can be set under *Initial iCare GPL Setup | DB Sync Schedule*.