

Round Robin Loyalty Configuration

Introduction

iCare now offers a Round Robin program which tracks uniquely purchased menu items. This iCare functionality was made available with mymicros.net v6.2.0, released January 2011. **Customers implementing a Round Robin Program must have purchased and implemented mymicros.net.**

An example of this program is a Brew Pub that offers a Beer Club, where loyalty members earn 1 point per unique beer that is purchased. At 25 points (i.e. 25 unique beers purchased) a \$10 stored value award is given. When the customer reaches 50 points a \$25 stored value award is given and at 100 points the customer will receive a \$35 stored value award. In this program each purchased eligible menu item will earn a point(s) once. If the same item is purchased again by a customer in the same transaction or a later transaction, that item will not earn an additional point(s). The organization may choose to offer awards at different point levels; award options can be an immediate (on-the-spot) discount, a coupon award or stored value award.

Running the program store level is simple; customers present their loyalty card at the end of each transaction to earn points for the unique purchased eligible items. Besides issuing points for unique items, staff may look up the point balance, as well as use a new lookup inquiry, 'Unique Item Inquiry' that will provide a list of previously purchased unique items. A list of previously purchased items may also be viewed online at myicard.net or requested through the iCare Web Service Interface for custom a webpage.

Requirements

Licensing, Software & POS Requirements

The organization must purchase licensing for mymicros.net and iCare Loyalty (Loyalty only or GPL licensing) to offer an iCare Round Robin program.

To support the new lookup inquiry, 'Unique Item Inquiry,' the site must install SVC v4.1.0.326 or higher. If the site will not allow staff to use the 'Unique Item Inquiry' at the POS, then it is not required to install SVC v4.1.0.326 or higher.

NOTE: All functions of this feature are only supported with the 3700 POS. 9700, e7 and Symphony may have this program configured. However, these POS types do not support the 'Unique Item Inquiry' that is available on the 3700 POS.

The latest version of SVC4 may be downloaded from micros.com Member Services; access to this web link is limited to MICROS Employees and MICROS Licensed Dealers:

http://members.micros.com/members/product_support/micros_products/res/Corporate/3700_gci.aspx

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General Program Requirements

The Round Robin program must be configured as its own program, separate from any other loyalty program, such as a program that tracks the number of visits or tracks the amount spent.

iCare Configuration should be completed by a Sys Admin user; configuration under iCare| iCare Configuration| Program, Card, Coupons and Rules.

iCare Configuration- Add a Program

The *Program Type* must be Loyalty. Suggest configuring a *Public Name* that is logical for loyalty customers, for example *Beer Club*. All other program options on the 'Main' tab should be configured as necessary.

Under the 'Loyalty Programs' tab, suggest configuring a *Loyalty Points Name* that is logical to customers, as this will display on myicard.net. For example, a Beer Club program could have a points name of *Purchased Beers*, which would be logical when customers view previously purchased unique items.

In this tab Program Expiration, as it applies to an individual account and its point balance expiration, can be configured. These options are *Account Expiration* and *Point Expiration*; configuring these options is not required. Configuration of these expiration options is dependent upon the loyalty program the organization runs. *Account Expiration* is a way to help keep a database clean, expiring accounts after X amount of time of inactivity. While *Point Expiration* for accounts would be used to encourage customers to frequently visit and purchase new items.

NOTE: Organizations using these expiration options will usually note in their marketing material when points and accounts will expire.

The next configuration section in this guide, Eligibility Rules, has an additional set of expiration rules that apply to tracking unique items purchased by a customer. Expiration or Resetting of unique purchased items does not reset a customer's point balance; it will simply reset or clear the unique items the customer previously purchased, so these items may earn a point if purchased again. Often program *Point Expiration* will be setup similar rules to Eligibility Rule expiration.

Example of how Program and Eligibility Rule Expiration can be configured to work together:

- Customers must purchase 35 beers within 1 year to receive an award; points will reset on a yearly basis. (*Program- Point Expiration*)
- Unique Items will be tracked on a yearly basis. Customers may earn 1 point per beer item per year. In year two, if a customer purchases a beer that was purchased in the previous year, they will receive a point for that purchase. (*Eligibility Rule- Item Expiration*)
- Accounts with no activity in the past 3 years are set inactive. (*Program- Account Expiration*)

Add an Eligibility Rule

It is required to create an Eligibility Rule, also the new option bit 'Items must be unique' should be enabled; this indicates the rule will be used for a Round Robin program, as well as provides additional configuration options for the eligibility rule.

Item Expiration for Eligibility

One of the new options is to create a limit of how many unique items will be recorded or tracked per customer. This new option is '**Max saved unique items/ account**' and provides a configured limit of number of unique items that will be recorded per customer. If configured, once a customer exceeds the max limit, the list of tracked items will be updated, deleting the oldest purchased items on the list, bringing the list to the set limit. This is an optional configuration setting. If no other eligibility expiration is configured for the program and this option is not set or the set limit is very high, such as 1,100, iCare transaction time when issuing points could be slower if the customer's unique item list is very large.

Another new Eligibility Rule option is the '**Unique Item Expiration Method.**' This option is designed to allow organizations to determine if, and when, customer accounts may be eligible to earn points again for previously purchased items. For example, an organization may state that previously purchased unique items are only tracked for 1 year. Therefore, unique purchased items are removed from a customer's tracking list 1 year after the day of purchase. If an item is purchased again and is not on the tracking list, that item will earn another point and will again be added to the tracking list.

Configuration options for the '**Unique Item Expiration Method**' are:

Never Expire- Unique Items purchased will not expire from tracking; unique purchased items will be tracked and reviewed for the lifetime of the loyalty account.

Expire items after X periods- Will expire individual items based on the purchase day of that item, removing the item from the tracked item list. Ex- Period Type = month, X= 3. An item purchased on 15th of January will be removed from the tracked list on April 15th and will be eligible again to earn a point.

Expire items after X rolling periods- Will expire individual items based on the period in which they were purchased, instead of the actual purchase day. Ex. Period Type = month, X = 3. 3 items were purchased in January, 2 on the 5th and 1 on the 15th. 3 items purchased during January will expire and be removed from tracking list at the end of April; removed items may earn points May 1st.

Reset all items after X periods- Will expire all purchased items for an account after reaching the purchase day of the first item. Ex- Period = month, X = 12. 12 months after the first item is purchased, all unique items will be expired and again available to earn points.

Reset all items after X rolling periods- Will expire all purchased items for an account based on the period when the first item was purchased. Ex- Period = year, X = 0. Customer joins program in March 2011. At the end of 2011 all unique items will be reset and removed from tracking, as the first purchase was during the year period. This option can allow customers to run programs and reset all items based calendar month, year, etc.

NOTE: Depending on the program requirements, the Unique Item Expiration Method may need to be configured in conjunction with Point Expiration for the program. Also, the iCare Sync to Expire Points may need to be configured.

Time Rule for Eligibility

Time Rule Eligibility configuration is optional; it would only be used if the program has specific days or times limiting when unique item points may be earned.

Item Rule for Eligibility

Item Rule configuration is required for this program; an organization must indicate which items should be tracked as unique items that earn points; these items will also be recorded when purchased by a customer.

Eligible Items may be configured by Family Groups, Major Groups, POS Record Numbers or Master Items. **For ease of maintaining Eligible Items for the program, using Family Groups or Master Groups is recommended. Family Group Masters or Major Group Masters is another suggested option.**

NOTE: Menu Item Master names display when customers view previously purchased unique items at the POS or on myicard.net. It is suggested to edit, as necessary, Menu Item Master names to more customer friendly names than what may be programmed at the POS.

IMPORTANT: The Round Robin program relies on mymicros.net End of Day posting, as well as alignment and iCare Syncs. All menu items, major groups, family groups and corresponding Master Item Syncs should be configured to run daily. It is recommended these syncs run after End of Day and before the locations open. Review the Syncs section for further details.

NOTE: Adding new items may take up to 24 hours to align and be available in the Round Robin program. This should be considered when new items are added that apply to the program. If an item is added mid-day and must be considered, immediately for the program, the item record number may be added to the Eligibility Rule for that day and later removed.

***Maintaining alignment and Master Item names is imperative for the Round Robin program, especially if more than one location participates in the Round Robin program.**

Add a Loyalty Rule

A Loyalty Rule with the *Type of Point Issue* must be added; it is **required** that the Round Robin **Eligibility Rule is linked** to indicate the items that will earn points.

On the **Points** tab the *Points Calculation Method* should be set to 'Number of unique selected items.' The *Point Factor* will determine how many points are earned per unique item.

Next Award Loyalty Rules should be configured based on the award structure of the program determined by the organization.

Link Program Rules

Edit the Round Robin Program that was previously created. Verify the correct card rule(s) is linked. Also, link the *Point Issue* Loyalty Rule and any *Award* Loyalty Rule that applies to this program.

iCare POS Configuration

A new POS Request Code is now available, '**Unique Item Inquiry.**' This must be enabled for unique items to be looked up per account at the POS—Print Text may be configured for this Request Code, though a POS Key record number, such as a tender, is NOT required for the Request Code.

NOTE: The only POS that currently supports the 'Unique Item Inquiry' is 3700 POS. The 'Unique Item Inquiry' should be enabled for all organizations using this program regardless of the POS type in

use. iCare Web Service calls utilize this function to look up and display unique item purchases for accounts online.

iCare Syncs

Syncs are scheduled processes that move data within iCare, update accounts and update programs, such as expiration of account balance and items. Based on the program(s) in use different syncs may be configured during program setup. Below are details regarding syncs, as they pertain to the Round Robin program—not all available or configured syncs are referenced below.

Unique Item Sync- REQUIRED

A new sync has been added for the Round Robin functionality and is required for this program. The suggested frequency of the sync is daily. However, if items do not expire or eligible items are not changed frequently, then weekly or monthly frequency is acceptable.

- Backup tracked unique items to the mymicros.net reporting database.
- Expire Menu Items from customer tracking lists, based on Item Expiration of the Eligibility Rule.
- Flag items in the mymicros.net reporting database that have been removed from the Eligibility Rule, i.e. Menu Items that are no longer in the Eligibility Rule, but were previously tracked for one or more customers. These items will be flagged to indicate the items are no longer applicable to the program, but the items will remain in the customer's historical tracking list.
 - Tracked items in the mymicros.net reporting database will never be purged.
- If an existing Eligibility Rule is unlinked from the Round Robin Loyalty Rule, iCare assumes these items are no longer applicable to the program. Tracked items from the previous Eligibility Rule will be purged in iCare for each account.
 - If the Round Robin program is in use (i.e. not in test or pilot) **it is highly suggested the Eligibility Rule is never unlinked from the Loyalty Rule**—instead edit the Eligibility Rule and its configured items if changes are necessary.
 - Another option is to create a new Eligibility Rule and new Loyalty Rule that will be linked to the Round Robin program—leaving the previous Eligibility Rule linked to the previous Loyalty Rule.

Updating New POS Menu Items in iCare

1. A new item is added in the POS during the middle of the day.
 - a. This item may be rung at the POS immediately, but mymicros.net and iCare do not have the name of this menu item, only the POS record number, which is sent in the transaction details.
2. Daily the POS runs an End of Day process, usually within 1 to a few hours of the location closing.

- a. This process will cause definitions (i.e. names) of new items added in the past 24 hours, such as menu items, tenders, discounts, etc., to be recorded in mymicros.net.
3. The new item definitions will then be recorded into iCare when the syncs that are detailed below have run.
 - a. It is suggested the below syncs are scheduled to run approximately 1-2 hour before the locations open, this will update items added to the POS before End of Day into iCare.

NOTE: Adding new items may take up to 24 hours to align and be available in the Round Robin program. If an item is added mid-day and must be considered immediately for the Round Robin program, the item record number may be added to the Eligibility Rule for that day.

Suggested Syncs

It is suggested that the following syncs are configured to run daily for maintenance of menu items, family groups and major groups:

Major Group
Family Group
Menu Item

If Masters Items are used in the Eligibility Rule(s) for the Round Robin program, then it is suggested the following syncs are also configured to run daily:

Major Group Masters
Family Group Masters
Menu Item Masters

The syncs *Expire Points* and *Expire Loyalty Accounts* may be configured based on the expiration rules of the Round Robin program.

POS Configuration & Functionality

Point Issue

The current *Point Issue* key will be used to issue points/ track unique items for a Round Robin program. The *Point Issue* function is supported on all MICROS POS types.

Unique Item Lookup

The new POS inquiry, *Unique Item Lookup*, allows store staff to recall previously purchased unique items and print these items at the POS. ***This inquiry is only available on the 3700 POS with SVC 4.1.0.326 or higher.***

- Configure a new POS touchscreen button for this function
 - The button should be an SIM/ PMS Inquiry
 - Linked it to the iCare SVC interface

- Set the inquiry number to 25

NOTE: Similar to Point Inquiry (Look up Point Balance), an open check is NOT required to use the new lookup inquiry for an account.

POS Functionality- Unique Item Lookup

At the POS, when the new Inquiry key is pressed, the operator will be prompted to swipe/ enter an account number.

Once the account is entered iCare will return a response. If the response contains previously purchased items, the POS will automatically print a list of the previously purchased unique items for that customer account. The Master Item names will print in alphabetical order, as well as print the purchase date of each item. The point balance of the customer account will print, as well as any configured print tokens, such as customer name.

NOTE: There is a limit to the number of lines that may be printed at the POS, up to 100 lines may be printed. If a large number of items are tracked, some previously purchased items may not be printed.

Online Functionality

The myicard.net webpage has been enhanced to allow organizations with a Round Robin program to allow customer accounts to view previously purchased unique items. The webpage will display customers' account balance, with a link to previous transactions and a link to update the customer profile. However, when an active Round Robin is configured a new link is available to view purchased unique items. There is no limit to the number of unique items that may be displayed on myiCard.net.

Tracked unique items will display with the check number, location of purchase, time, and date of purchase. Items will display from the most recent purchases to oldest, but list may be sorted alphabetically.

NOTE: The unique item names that display on myiCard.net are the Master Menu Item names. This allows the Menu Item names to display consistently regardless of which location the item was purchased. Also, organizations may edit the spelling of the Master Menu Item names to be more customer friendly than what may be programmed at the POS.