



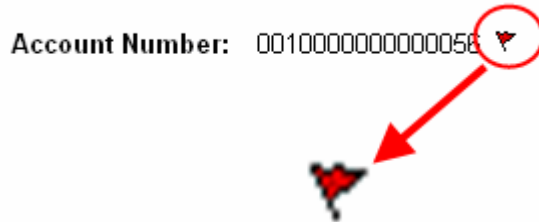
iCare Customer Notes

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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:

The screenshot shows the 'Organization Configuration' page in the iCare application. The page has tabs for 'Main', 'Guest Web Styles', and 'Sales Itemizer Names'. The 'Main' tab is active. The page contains various configuration fields:

- 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: 25
- Request Custom Class Prefix:
- Offline Expire After Num/Business Days: 5
- Require Email Address: ☒
- Concierge Guest Cover: 30
- Enable Customer Notes: ☒ (highlighted with a red box)
- Guest Instructions:
- Other Options: iCareOptions=2

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

Name	Description
▶ Programs, Cards, Coupons and Rules	
▶ Customer Attributes, Signup Sources	
▶ Initial iCare GPL Setup and Configuration	
▶ Organization Configuration	General Info, Web Styles, Interfaces, Sales Itemizers
▶ Locations	Setup Locations and Merchant IDs
▶ DB Sync Schedule	Schedule Database Synchronization Events
▶ Customer Note Categories	Setup Customer Note Categories

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

Choose Action
Add
Edit
Cancel

Customer Note Categories

Search by Name

Note Category Name ▲

Certificate Issue
Enrollment Issue
Miscellaneous
Point Issue
Redemption Issue

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

Choose Action
Save
Cancel

Customer Note Categories

Note Category Name:

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:

Choose Action
Configure
Cancel

Role Portlet Administration

Search by Name

Sys Admin

Role ▲

0000000000000000-
Corporate User
Download
Store Manager
Sys Admin
ROLE3
ROLE4

4. Select Account Admin and click Edit:

Choose Action Add Edit Delete Cancel

Role Portlet Administration

Search Role Portlet

For the Role: Sys Admin

Portlet	Side Menu Number	Side Menu Title
*More Forms...	4	FORMS
Account Admin	5	iCARE ADMIN
Adjustments Chart	13	More Charts...
Audit & Analysis	3	LINKS
Banquet Rvc Chart	1	CHARTS
Birthday Report	0	myPage Section
Dining Time Chart	2	REPORTS
EMS	9	ADMIN
EMS Security Setup	0	ADMIN

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

Choose Action Save Cancel

Role Portlet Administration

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
- ☒ Reissue Customer Kit
- ☒ Replace Card
- ☒ Set Red Flag

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:

Choose Option Edit Account Information View Customer Notes Reissue New Customer Kit Replace Card Reset Priv

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

Choose Option Add Cancel

Account Number: 0010000000000056 ▼

Customer:

Date	Note	Red Flag	Admin User	Note Category
2007-07-26	insufficient points	✓	Sys Admin	Point Issue
2007-07-19	Test		Sys Admin	Miscellaneous

- 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
- To add a note, click Add from the top bar menu
 - 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

Choose Action Save Cancel

Note Category: Select Value ▼

Red Flag: ☐

Note:

- Click Save