iCare & Verifone Vx570 Integration

General Information

About this Document

This document contains instructions for configuring the Enterprise Information Portal and the VeriFone Vx570 for use with the iCare Customer Relationship Management Product.

The following topics are discussed in this document:

Declarations

Warranties

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Design and Production

This manual was written with Adobe FrameMaker.

iCare GPL & VeriFone

iCare Gift, Payment & Loyalty

The iCare Gift, Payment, and Loyalty (GPL) Product provides comprehensive customer relationship management. Typically, iCare is composed of Gift & Payment Programs and Loyalty Programs. MICROS has introduced the ability to interface the powerful iCare Product with the VeriFone Vx570 standalone terminal.

VeriFone Vx570

The VeriFone Vx570 terminal is a counter-top terminal capable of providing iCare support.

How it Works

Organizations will be able to perform iCare GPL transactions on the VeriFone Vx570 via Simple Object Access Protocol (SOAP) via an HTTPS connection.

Hospitality employees will be able to communicate with the iCare Gift, Payment, and Loyalty Product using the Vx570 for smooth, seamless customer transactions and faster processing times.

Basic Functionality of the User Interface (UI)

The UI is composed of function keys, an alpha-numeric keypad, configurable numeric keys, and a configuration menu key.

VeriFone Vx570

FUNCTION KEYS

The VeriFone Vx570 offers a number of functions in order to accomplish hospitality tasks. There are three categories of function keys:

- Standard Function Keys
- Purple Function Keys
- Color-Coded Function Keys

Standard Function Keys

The function keys are the gray keys positioned to the right of the terminal display screen. An operation on the terminal can be initiated when the appropriate function key is pressed. The options onscreen will determine the behavior of the Standard Function Keys.

Purple Function Keys

The purple keys can be configured to initiate specific operations,.
For the purposes of iCare GPL, these keys have been configured to act as arrow up/down keys between various display screens. These keys are located directly below the display screen.

- Key 1 - Arrow Key - controls the up/down movement on the display screen
- Key 2 - Arrow Key - controls the up/down movement on the display screen
- Key 3 - not necessary for iCare GPL Functions
- Key 4 - Return to Previous Step - returns to the previous step in a transaction flow (only active during gift/loyalty transactions)

Color-Coded Function Keys

The color-coded keys perform specific tasks. On the Vx570, these keys are located directly below the alpha-numeric keypad.

- Red Cancel Key: Press this red key to cancel the current operation.
- Yellow Key is known by several names: Clear Key, Direction Key or Backspace Key: This yellow key can be used as a backspace key, capable of erasing or clearing typed text.
- Green Enter Key: This key is used like the ENTER key on a computer keyboard.

Alpha-Numeric Keypad

The keypad contains rows of numeric keys with alphabetic characters. The keypad accepts numeric key strokes as the default.

Press this button to activate alpha functionality.

To change from numbers to letters, first press the numeric key that displays the desired alpha characters, and then press the [Alpha] key until the appropriate alpha character displays. For example, the number key 2 represents the digit 2, as well as the alpha characters A, B and C. First, press the number 2, then press the [Alpha] key once to display the letter A, press twice to display the letter B, or three times for the letter C.

For example, to spell the last name "SMITH", the sequence would be performed as follows:

- S = 7 + [Alpha] + [Alpha] + [Alpha]
- M = 6 + [Alpha]
- I = 4 + [Alpha] + [Alpha] + [Alpha]
- T = 8 + [Alpha]
- H = 4 + [Alpha] + [Alpha]

Setup & Configuration

Portal Configuration

Support for VeriFone Terminals

MICROS has extended their iCare functionality to non-MICROS POS, specifically standalone terminals. This increased flexibility gives more organizations the ability to incorporate the powerful and comprehensive iCare Customer Relationship Management tool into their businesses.

iCare functionality for standalone terminals is configured on a location-by-location basis. The feature has been designed this way, since many organizations may choose to use of both MICROS POS, as well as other, third-party generic interfaces.

> *Note*   *At this time, MICROS iCare can be configured to work with VeriFone Vx570 Terminals.*
>
> *VeriFone™ is a registered trademark of VeriFone.*

After designating the location available for standalone terminal configuration, six categories of configuration must be established. These default settings are the general or "standard" configuration for any standalone terminal. These settings include:

- Default Parameter - establish basic default parameters for standalone terminal interfacing with the MICROS Stored Value Card Server
- Terminal Type - provide available terminal types for use
- Receipt Configuration - define header and footer content that will appear on receipt chits
- Program Configuration - indicate which programs will be available for use at the standalone terminal
- Revenue Center Configuration - specify any and all revenue centers wherein standalone terminals will be used with iCare
- POS Screen Configuration - assign the corresponding POS Configuration settings to the standalone terminal architecture

Default Parameter, Receipt Configuration, and Revenue Center Configuration settings may be overriden at the location level.

REQUIREMENTS

For the VeriFone Vx570, an IP/Internet connection and internet availability must exist in order for it to operate. For more information on VeriFone functionality, please refer to www.verifone.com/product/devices/vx/Vx570.html.

LIMITATIONS

Since it is not fully integrated with the POS, standalone terminals have limitations with respect to iCare functionality.

Prior Visit Credit

Members will not be able to receive credit for prior visit.

Earning Credits/Issuing Points

When issuing points, Check Total and Subtotal will be the same values. No transaction detail will be available for the check, meaning the standalone terminal will not "upload" any check detail to the portal; only the act of issuing the points/awards will be provided. Therefore, no reporting on the items in that will be available.

Eligibility Rules may restrict the amount of points able to be issued; VeriFone cannot identify eligibility of items on the check; therefore, cashiers must be trained on how to identify points correctly and issue accordingly.

As such, using any of the following point calculation method types will result in no point issuance:

◆ Number of Selected Items

◆ Value of Selected Items

◆ Number of Unique Selected Items

◆ If any item selected on Check

◆ New items this period

◆ Additional points if any selected...

◆ Use multiplier if any selected

If you decide to create a rewards program based on the purchase of specific menu items, (i.e., customer receives points for every sandwich ordered), the Vx570 has no means of verifying the presence of that menu item on the check.

Accepting Reward Coupons

VeriFone cannot check for coupon eligibility or calculate a coupon's amount. Can only determine coupon validity, i.e., the coupon has not been used/is not expired. Therefore, employees must be trained on how to administer coupons when customers meet their threshold.

Coupons with Redemption Rules are not able to be evaluated by VeriFone; this does not mean Redemption Rules cannot be configured; rather, VeriFone is not able to process the Redemption parameters. Coupon value will be accepted in to match the amount in request, and will never exceed the amount in request. However, it may be less than the requested amount. For example, if it is a fixed amount of $5 coupon, $2.50 will be accepted if the requested amount is $2.50 instead of $5. $5 will be accepted if the requested amount is $50.

Immediate Discounts

To issue an immediate discount that is not a stored value credit or a coupon, you must use the Award Discount Types of "Use Award Amount" or "Use Percentage of Check Subtotal" on the Awards Tab of the Loyalty Rule Administration page in the portal.

Setup & Configuration

Configuring standalone terminals to work with iCare is an extensive process with many steps. Please follow the steps below carefully to ensure the proper configuration for your stores.

I. CONFIGURE THE LOCATION TO USE A STANDALONE TERMINAL:

1. Login as Sys Admin
2. Navigate to Admin | Portal | Organizational Structure | Locations
3. Select a location and click Edit

4. Enable the option marked Use Standalone Terminal:

5. Save

Note   *This step may have been performed during the initial*
                setup and implementation of the organization when
                locations are being added to the reporting structure.

                Please be sure this option bit is enabled, otherwise the
                location will not be available to receive standalone
                terminal configuration settings.

                As always, when locations are added or updated, you
                must remember to sync the information via iCare
                Admin | Initial iCare Setup & Configuration | DB Sync
                Schedule.

II. SETUP THE REWARDS PROGRAM

Typically, the MICROS Implementation Group will configure loyalty and award programs for your organization. However, for those organizations who will be setting up programs on their own, the following has been provided as a "quick overview" of the steps that must be taken in order to configure a successful awards program.

> *Note*   *This is not a full list of all loyalty and awards configurations steps for iCare. This is a sample of what a typical reward program may consist of. For more information on setting up loyalty programs, please refer to the iCare GPL Configuration Manual.*

The following must be configured:

- ◆ Card Rule
- ◆ Loyalty Program
- ◆ Loyalty Point Issue Rule & Point Award Rule
- ◆ Eligibility Rule
- ◆ Link all Rules to the Program

> *Note*   *These steps must be configured, regardless of whether the enterprise is using a MICROS POS or a Standalone Terminal.*

Card Rule

Establish the sequence of card numbers that will be accepted for this program. This can be accomplished by navigating to iCare Admin | iCare Config | Programs, Cards, Coupons and Rules | Card Rules. Add the Card Rule, filling out the necessary fields:

Loyalty Program

Create the Rewards Program. It is to this program that all point issuance, award, eligibility rules, etc., will be associated. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Programs. Add the Loyalty Program:

Eligibility Rule

An Eligibility Rule must be associated with the Loyalty Point Issue Rule. This rule allows for items to be eligible for point issuance. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Eligibility, and add an Eligibility Rule:

Eligibility Rules may have Time and Item Rules to provide guidelines for times of availability or available items for redemption.

Note	*Loyalty Rules and Accept Coupon Rules may be associated with an Eligibility Item Rule. The VeriFone request is incapable of interpreting the presence of available items.*
	This issue may be resolved by staff training.

Loyalty Point Issue Rule & Point Award Rule

Define the parameters by which points will be issued to an account and the circumstances under which an award will be issued. Specify the number of points to be issued, as well as the criteria by which they will be distributed, and, upon reaching a pre-defined threshold, the trigger which initiates an award. Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Loyalty Rules.

Add the Point Issue Rule being sure to select the recently created Eligibility
Rule:

Add the Point Award Rule:

Link All Rules to the Program

All rules must be linked to the program. At the top of the Programs Overview page, there are a number of options for editing rules:
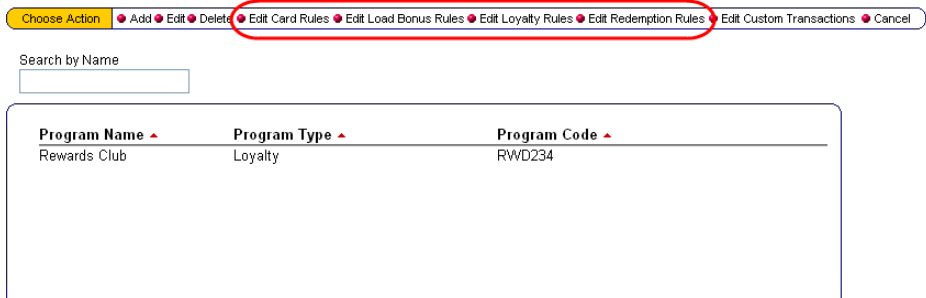
Navigate to iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules | Programs. Highlight the Program Name and begin assigning the Card Rules, Loyalty Rules, and any other rules, as needed.

III. CONFIGURATION

There are six types of configuration (mentioned above) that must take place before standalone terminals may be assigned to locations. **These settings must be configured before you can move forward.** From the Configuration Overview page, both standard and location-specific standalone features may be enabled.

To access the Configuration Overview page:

1.   Login as Sys Admin

2. Navigate to iCare Admin | iCare Config | Standalone Terminal
    Configuration | Terminal Configuration; the following page will appear:

Default Parameter:

1. Click the Configure button in the Default Parameter section
2. Configure the page according the descriptions found in the table below:
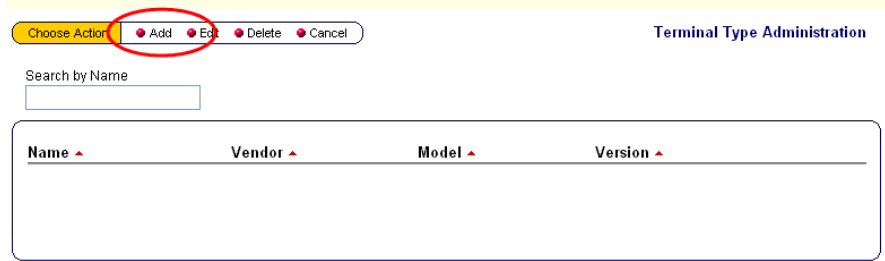
Field	Description
IP Timeout	Enter the number of seconds the terminal should wait before retrying/canceling the transaction. The at least 15 seconds. The default is 60 seconds.
Dial Timeout	Enter the number of seconds the terminal should wait before retrying or canceling the transaction. The timeout should be at least 30 seconds. The default is 60 seconds.
Retry Strategy	Select the appropriate retry strategy: ◆ No Retry - system will not attempt to transmit data ◆ Same Connection - system will use the same connection to transmit data, if retransmit data flag = Yes ◆ Dial Up - system will use the dial-up connection to transmit data, if retransmit data flag = Yes
Encrypted PIN	Enable this option if an encrypted PIN will be used
Business Day Start Time	Enter the business day start time 24-hour format (0:00 - 23:59)
View Configuration Password	Enter a password which can be entered to grant local level viewing of configurations. 8-integer limit
Edit Configuration Password	Enter a password which can be entered to grant local level setup and configurations 8-integer limit
Reversal Password	Enter a password which can be entered to grant point/award reversals at the local level. 8-integer limit

3. Save

Terminal Type:

1. Click the Configure button in the Terminal Type section

2. Click Add from the top menu bar to add a new standalone terminal:

3. Configure the page according the descriptions found in the table below:
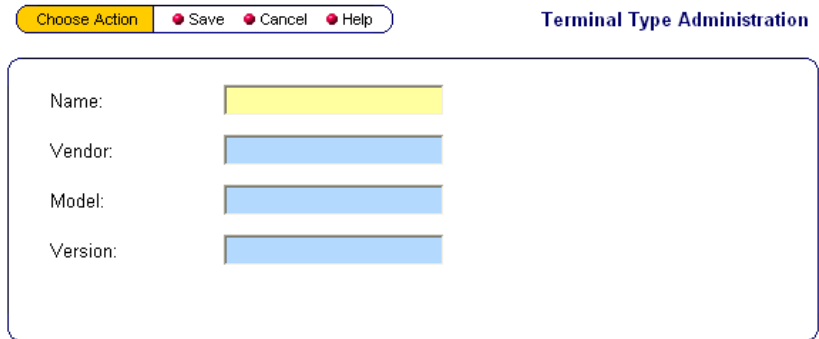
Field	Description
Name	Enter a name for the terminal
Vendor	Specify the terminal's vendor
Model	Specify the terminal's model number
Version	Specify the terminal's application version number

4. Save

Receipt Configuration:

1. Click the Configure button in the Receipt Configuration section

2. Click Add from the top menu bar to configure text for a receipt:

3. Configure the page according the descriptions found in the table below:

Field	Description
Name	Enter a name for the receipt
Description	Enter a brief description for the receipt's purposes
Header Line 1-5	Enter text to be included in the receipt header lines. Blank lines will be omitted/suppressed. 32-character alphanumeric limit. Lines less than 32 characters will be automatically centered.
Trailer Line 1-5	Enter text to be included in the receipt trailer lines. Blank lines will be omitted/suppressed. 32-character alphanumeric limit. Lines less than 32 characters will be automatically centered.

Program Configuration:

1. Click the Configure button in the Program Configuration section

2. Click Add from the top menu bar to link GPL programs:

3. Enter a name and a brief description in the Configuration Name and Description fields:

4. Click the Add button to reveal a drop-down list from which you can select available iCare Programs to link to the configuration:

5. Use the drop-down list to select an iCare Program and click Save

6. Repeat step 5 for any additional iCare Programs to be added to the Configuration

7. Click Save from the top menu bar to maintain your updates

Note   *iCare Programs are typically configured by the mymicros Implementation Team via iCare Admin | iCare Config | Programs, Cards, Coupons, and Rules.*

Revenue Center Configuration:

1. Click the Configure button in the Revenue Center Configuration section

2. Click Add from the top menu bar to link Revenue Centers:

3. Enter a name and a brief description about the Revenue Centers:

4. Click the Add button to reveal an area where you can enter the Revenue Center Name (16-character alphanumeric limit) and its RVC Number (9-integer limit):

5. Enter the name and number for the RVC in the fields provided and click Save to update the form

6. Repeat step 5 for any and all RVCs to be included in this configuration
7. Click Save from the top menu bar to maintain all updates to this form

POS Screen Configuration:

1. Click the Configure button in the POS Screen Configuration section
2. Click Add from the top menu bar to add a new POS Screen Configuration:

There are 2 tabs on the Add POS Screen Configuration Page: Main and Transaction Type

3. On the Main Tab, configure the fields according to the table below:

Field	Description
Configuration Name	Enter a name for the POS Screen Configuration
Description	Enter a brief description for the POS Screen Configuration
Line Feed Function Menu Placement	Enter the placement for the Line Feed Function in the menu (1, 10-99) 2-integer limit
Display Version Function Menu Placement	Enter the placement of Display Version Function in menu (0, 10-99) 2-integer limit
Reload Configuration Function Menu Placement	Enter the placement of Reload Configuration Function in menu (0, 10-99) 2-integer limit
Reprint Function Menu Placement	Enter the placement of Reprint Function in menu (0, 10-99) 2-integer limit
Menu1-9 Descriptor	Enter any menu descriptors to be placed in positions 1-9; only the first descriptor is required

4. On the Transaction Type Tab, click Add to add a Transaction Type to the POS Screen:

5. Configure the page according the descriptions found in the table below:

Field	Description	
Name	Use the drop-down list to select from available transaction types	
	Select...	*to...*
	Issue Account	issue a stored value card
	Activate Account	activate a stored value card
	Reload Account	recharge, reload, or add additional value to a stored value account
	Authorize Redemption	request authorization to debit a stored value account for a specified amount
	Redeem Point	redeem earned points through the terminal
	Cash Out Account	provide cash back for a stored value card

Field	Description	
Name (cont'd)	Inquire Balance	obtain the account balance on a stored value card
	Transfer Balance	transfer the account balance from one account number or card to another account number or card
	Issue Point	assign points to a loyalty card
	Inquire Point Balance	retrieve a specific loyalty card's point balance
	Lookup Customer by Phone Number	search for a customer by his/her provided phone number
	Lookup Customer by Name	search for a customer by a combination of first and last name or by last name only.
	Accept Coupon	accept the coupon
Menu Descriptor	Enter a brief description for the function type.	
Menu Placement	Placement on the menu tree (0, 10-99). The first digit defines top menu level. The second digit defines the second menu level.	
Enabled	Enable this option to activate the transaction, i.e., to make the Issue Points feature function, you must enable this option bit.	
Prompt for Revenue Center	Enable this option bit if the employee will be able to select at which revenue center the points/credits were earned or the award was redeemed	
Prompt for Coupon Code	Enable this option if the employee will be required to enter a coupon code upon award redemption	
Require Password for Reversal	Enable this option if the employee will be required to enter a password in order to process a point and/or award reversal transaction Refer to Default Parameters for the default reversal password	

Field	Description
Require PIN with Swipe	Enable this option if the employee will be required to enter a PIN when a loyalty card is swiped
Require PIN with Manual Entry	Enable this option if the employee will be required to enter a PIN when a loyalty card transaction must be processed manually

6. Click Save to maintain your updates on this page - your updates will appear on the Transaction Types tab:

7. When the Main and Transaction Types Tabs have been updated appropriately, click Save from the top menu bar

When all configurations have been set, the Configurations Overview page will resemble the following:

IV. ASSIGN CONFIGURATIONS TO LOCATIONS

Configure location specific settings in this area of Standalone Configuration. Only locations designated as Standalone locations will appear in this list.

1. Login as Sys Admin
2. Navigate to iCare Admin | iCare Config | Standalone Terminal Configuration | Terminal Configuration
3. After completing the configurations (see above), click Locations from the top menu bar:

4. Select the corporate level or select locations individually by enabling the check boxes next to the location name:

5. Use the drop-down lists to specify the types of configuration to be in effect at the selected location(s) [Currency and Terminal Type are not mandatory at this time]:

6. When all configurations have been set, click Save from the top menu bar

V. ASSIGN TERMINALS TO LOCATIONS

1. Login as Sys Admin

2. Navigate to iCare Admin | iCare Config | Standalone Terminal Configuration | Terminal Configuration

3. After setting standard configurations and establishing location-specific information, click Terminal from the top menu bar:

4. Select a location and click Configure Terminal from the top menu bar:

5. Click Add from the top menu bar to begin adding terminals; a page similar to the following will display:

6. In the Terminal fields, modify the following:

    ◆   Enter a Name for the terminal (ex. Bar, Bar 1, Side Station 2, etc.)
    ◆   Enter a brief description
    ◆   Specify the Terminal Number - **you should not have duplicate terminal numbers at a single location**
    ◆   Enter the Terminal Serial Number

    Note   *This number can usually be found on the underside of the terminal*

    ◆   Specify the Terminal Type
    ◆   Use the drop-down list to designate a currency

◆   Enter an Effective From date (required) and an Effective To date
     (optional)

7.   If you wish to override the Default Parameter settings, click the Override
     button in the Default Parameter section and make updates:

8.   If you wish to override the Receipt settings, click the Override button in the
     Receipt section and make updates:

9. If you wish to override the Revenue Center settings, click the Override button in the Revenue Center section and make updates:
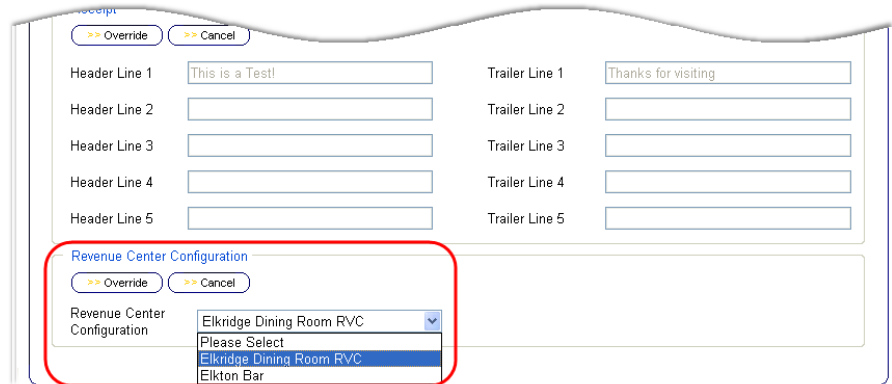
10. When all configurations/updates have been made, click Save from the top menu bar

When iCare Customers meet a specified threshold, a coupon can be automatically generated and emailed to them.

Vx570 Configuration: Out of the Box

When you open the box you should find:

a. a terminal
b. a power cord
c. a power pack
d. an RJ45 network cable
e. a roll of paper
f. a modem cable (not used for iCare - not shown)
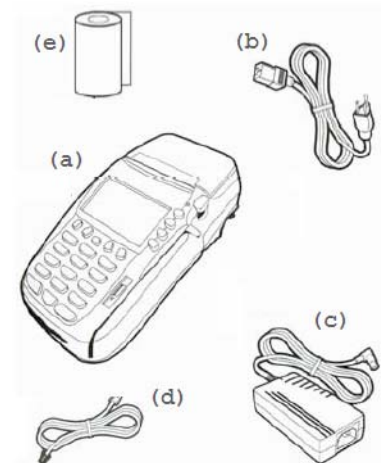
Provide the Terminal Serial Number to MICROS

Before you can begin setting up your terminal, you must contact the MICROS Help Desk at 1-800-937-2211 to open a case and provide them with the terminal serial number. A representative will return your call to assist you. The hours of operations for support for this product are Monday through Friday, 8:00AM - 5:00PM EST.

All terminals have unique configurations that are based on this number. The serial number is located on the underside of the terminal. To locate the serial number, turn the terminal over. The serial number will be on a small white tag and will look similar to the example below (your serial numbers will be different):

After receiving the serial number, MICROS will provide you with the information necessary to complete the in-store configuration of the terminal, such as Terminal Name, Number, Location, required passwords, etc., in a Download Email.

Information Used in Configuration

Throughout configuration of the Vx570, location and terminal specific information will be entered into the terminal. The following passwords and port will be used throughout setup; the steps provide guidance regarding proper usage of passwords/port:

- System Password: **1[alpha][alpha]66831**
- iCare Password: **42273**
- Default Password: **11111**
- Primary Authorization Port: **9443**

The area below can be used to maintain terminal and location specific information that has been provided to you in the Download Email. Enter the information provided to you in the blanks below for quick reference.

Terminal Name: _____

Terminal Number: _____

Location Name: _____

Location Logon Name ID: _____

Location Logon Password: _____

Primary Authorization URL: _____

Setup the Terminal

To complete the Terminal Configuration section, you will need the System Password (**1[alpha][alpha]66831**), the Terminal Name, Terminal Number, and Location Name. This information will be provided to you in the Download Email. Refer to"Alpha-Numeric Keypad" on page 4for any alpha numeric functions.

Note	*If at any time your terminal "times out", you will be required to restart configuration steps from the last saved step.*

Note	*Often it is necessary to scroll through the display screens to locate the correct option. In the steps below, this procedure will be displayed as:*

$$\downarrow + \text{[Function Key]}$$

1. Using the power pack, connect the power cord to the terminal and to an outlet. Your Vx570 will power on
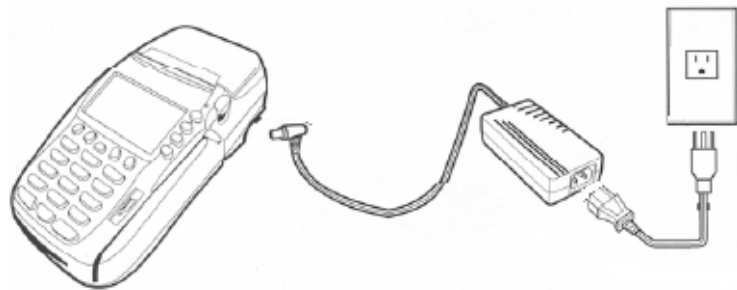
Note	*The first time you turn on your VeriFone Vx570, an Error Message stating "Illegal Terminal" may display.* **This is normal**. *Press the green Enter key to access the Start Screen*

2. Plug the network cable into the **10BaseT** port on the back of the terminal.
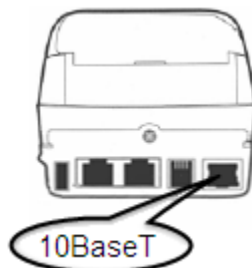
3. Select ICARE GL (**F3**)

4. Press number 6 on the keypad (your screen may be blank)
5. Enter the System Password (**1[alpha][alpha]66831**) and press the green Enter key; the Quick Setup screen will appear:

6. Select Terminal (**F2**)
7. Select View (**F2**)
8. Select Edit (**F3**), enter the Terminal Number (provided in Download Email), and press the green Enter key

9. Select Next (**F2**) | Edit (**F3**), enter the Terminal Name (provided in Download Email), and press the green Enter key

10. Select Next (**F2**) | Edit (**F3**) enter the Location Name (provided in Download Email), and press the green Enter key

11. When all settings have been defined, select Exit (**F4**)

12. At the save changes prompt, select OK (**F2**):

Enter the iCare Server URL

To complete this section, you will need the System Password (**1[alpha][alpha]66831**) and the Primary Authorization URL (the URL that connects to the iCare Data Center).

1. Select ICARE GL (**F3**)
2. Press number 6 on the keypad

3.   Enter the System Password (**1[alpha][alpha]66831**) and press the green Enter key; you will be taken to the Quick Setup screen

4.   Select the IP Hosts option (**F4**)

5.   Select View (**F2**)

6.   Press Edit (**F3**) to enter the Primary Authorization URL (*ex. www3.myiCard.net*); then press the green Enter key

7.   Select Next (F2) to call the Primary Authorization Port screen; press the Edit (F3) option to enter the Primary Authorization Port number (9443) then press the green Enter key;

Note   *Although Secondary Authorization URL and Port may be configured under IP Hosts configuration, they are not required for iCare support.*

8. At the Save Changes prompt select OK (**F2**)

9. After the terminal saves your changes, push the Cancel/Red [**X**] key located on the keypad to return to the start screen

Enter Location Logon Name ID and Location Logon Password

To complete this section, you will need the Terminal Number (if not already configured), the information specified in the Standalone Configuration Default Parameter section of the Portal, and the Location Logon Name ID and Location Logon Password (both provided by MICROS).

1. Select ICARE GL (**F3**)
2. Press the green Enter key; the Configuration screen will appear
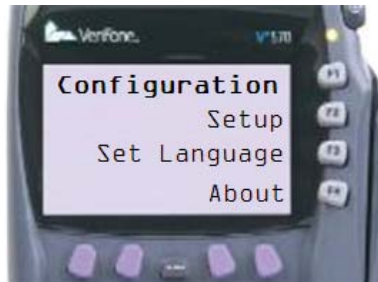
3. Select Setup (**F2**) and enter the system password (**1[alpha][alpha]66831**); the Setup screen will appear
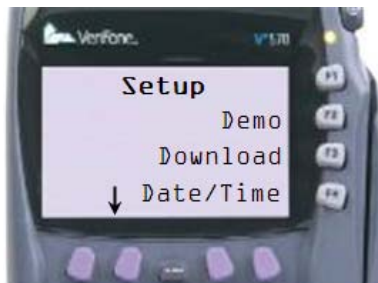
4. From the Setup page, select Edit Config (⬇ + **F1**); the Edit Config screen will appear
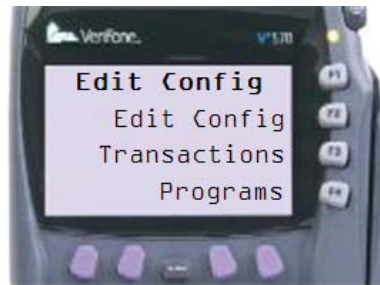
5. From the Edit Config screen, select Edit Config (**F2**)

6. When prompted, enter the password 42273; the Setup screen will appear

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Note   *The password 42272 is only valid during first-time configuration.*

All subsequent configuration will accessible based on the password entered in the Portal Standalone Configuration section under Default Parameters.

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7. Select Next (**F2**) to access the LocLogonName screen

8. Enter Default Password **11111** and press the green Enter key

9. Select Edit (**F3**) to enter the Location Logon Name (ex. ABC001) and then press the green Enter key

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Note	*DO NOT enter any underscores/underlines in this field. The system will not accept them.*

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10. Select Next (**F2**) to advance to the LocLogonPword screen, select Edit (**F3**) to enter the Location Logon Password and then press the green Enter key
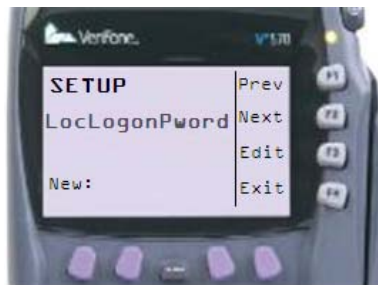
11. When all settings have been defined, select Exit (**F4**)

12. At the save changes prompt, select OK (**F2**) to confirm
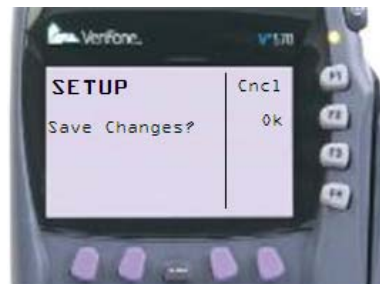
13. Restart the Terminal - press (**F2**) and (**F4**) simultaneously; enter the System Password (1[alpha][alpha]66831) and then select **F4** to Restart the terminal.

Configuration Complete

If the connection to the iCare Data Center is successful, then the screen will refresh to the start screen. The Vx570 is then operating correctly and is ready to be used with the iCare Gift, Payment, and Loyalty Program.

If the Restart does not successfully connect with the iCare Data Center, then the terminal will beep 4 times. If this occurs, repeat the steps on this document. If you are still unsuccessful, please contact the MICROS Help Desk for assistance at 1-800-937-2211, Monday through Friday, 8:00AM - 5:00PM EST.

The Vx570 Printer

For paper orders, contact POS Depot 1-877-767-4400 or www.posdepot.com for the correct size (2 1/4" (58M) 84') roll paper for the Vx570, part number **POS-SP58V**. The paper must be ordered by the case, which includes 72 rolls.

To replace the printer paper:

1. Open the lid to the paper roll by pressing the print roll release button

2. Remove the old roll and replace it with a new roll

   Note   *Paper should feed from the bottom; the paper should not come "over the top" of the roll.*

3. Close the lid

Using the Vx570 with iCare

Overview of Functionality

Organizations using the Vx570 in their establishments will be able to perform almost all iCare functions with little to no problem. The only area in which the Vx570 is limited is in the ability to validate the existence of eligible items. This is because check summary information is not sent from the VeriFone to the iCare Data Center. The For example, if an organization has a rewards program configured to issue points for the whole check value, as long as there is an entree purchase, the Vx570 itself does not have a means of identifying that entree item. Therefore, proper training for cashiers and members of staff who will be using the Vx570 is critical and must be carried out to ensure accurate point issuance from the terminal.

The following transactions are supported:

Gift & Payment	Loyalty	General
Issue Account	Issue Point	Balance Transfer
Activate Account	Point Balance Inquiry	Accept Coupon
Reload Account	Lookup Customer by Phone Number	
Redemption/Payment Authorization	Lookup Customer by Name	
Redemption/Payment Cashout		
Balance Inquiry		

Screen Overview

There are a few screens that can be considered the "launch pad" for the various iCare functions. They will be examined them below.

> *Note*   *Due to character limits, some of the options and functions displayed on the Vx570 may cut off a few letters.*

Main Screen

On the main screen, you will be able to access either the Communication Server or iCare Gift and Loyalty Functions:

From this screen, you will usually select ICARE GL (**F3**)

ICARE GL Screens

The iCare Gift and Loyalty Screen is the screen from which all iCare Functionality will begin. There are three pages to the iCare GL screen, so you will need your purple arrow keys to scroll:
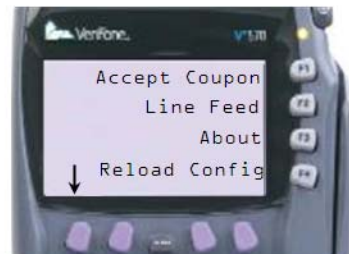
Loyalty Functions Overview Screen

If you select Loyalty (F2) from the ICARE GL screen, you will be taken to the Loyalty Functions Overview Screen. From this page, you will be able to issue points, perform balance inquiries, and look up customers by name or telephone number:

Gift & Payment Functions Overview Screen

If you select GiftCard (F3) from the ICARE GL screen, you will be taken to the Gift Card Functions Overview Screen. From this page, you will be able to issue cards, activate accounts, redeem gift card balances, reload and cash out cards, and check card balances:

Remaining Functions

There are additional functions which can be accessed from the ICARE GL Screen:

◆ Accept Coupon - selecting this option will initiate the task of accepting a coupon; coupons do not necessarily need to be gift or loyalty functions, ergo the Accept Coupon function exists separately from the Gift/Loyalty Screens.

◆ Transfer Card - selecting this option permits users to transfer one card to another card. Transfer Card functions for both gift and loyalty type cards, ergo the function exists outside of the Gift/Loyalty Screens.

◆ Line Feed - pressing this option advances the paper roll

◆ About - pressing this option will display "About" information

◆ Reload Config - selecting this option will update the Vx570 to reflect any changes that may have been made to the portal configuration

◆ Reprints - selecting this option will print the last transaction performed on the terminal with the word DUPLICATE written at the top of the chit

Gift & Payment Functions

Account Functions

The steps for issuing, activating, reloading, redeeming, and cashing out accounts, as well as Balance Inquiries and Redemption Authorizations are almost identical. The varying factor is the type of function which is specified in Step 1. For all other steps, the actions are the same or similar.

> *Note* *Often it is necessary to scroll through the display screens to locate the correct option. In the steps below, this procedure will be displayed as:*
> ⬇ + [Function Key]

1. Navigate ICAREGL (F3) | GiftCard (**F3**)
2. Select the desired Function Key:
    ◆ Issue Card (**F2**)
    ◆ Activate Account (**F3**)
    ◆ Redeem (**F4**)
    ◆ Redeem Auth (⬇ + **F1**)
    ◆ Reload (⬇ + **F2**)
    ◆ Cash Out Account (⬇ + **F3**)
    ◆ Card Balance (⬇ + **F4**)
3. Enter the employee number and press the green Enter key

4. Swipe the card/manually enter card account number and press the Enter key

> *Note*   *If a prompt for revenue center appears, select the intended revenue center for the transaction.*

5. Enter the check number and press the green Enter key

> *Note*   *If a prompt for program selection appears, select the intended program for the transaction.*

6. A prompt for Void/Reversal prompt will appear; select No (F1)
7. Enter the amount and press the green Enter key

Depending on the function selected, a customer receipt will print with confirmation of the transaction, balance information, etc. This receipt should be presented to the customer as a record of the transaction. If unsuccessful, regardless of function selected, an error message will display on the terminal. The message may be cleared by pressing any button.

Gift/Payment Voids and Reversals

Voids and/or reversals may occur for a number of reasons, like accidentally issuing or reloading a gift card for the wrong amount. Depending on how the system has been configured, point voids/reversals may require a password. Follow the instructions below to apply a reversal to a gift card issue, activate, reload, redemption.

> *Note*   *Often it is necessary to scroll through the display screens to locate the correct option. In the steps below, this procedure will be displayed as:*
> ↓ + [Function Key]

1. Navigate ICAREGL (F3) | GiftCard (F3)
2. Select the desired Function Key
    ◆ Issue Card (F2)
    ◆ Activate Account (F3)
    ◆ Redeem (F4)
    ◆ Reload (↓ + F2)
3. Enter the employee number and press the green Enter key
4. Swipe the card/manually enter card account number and press the Enter key

> *Note*   *If a prompt for revenue center appears, select the intended revenue center for the transaction.*

5.   Enter the check number and press the green Enter key

> *Note*   *If a prompt for program selection appears, select the*
> *intended program for the transaction.*

6.   Enter the amount and press the green Enter key
7.   A prompt for Void or Reversal will appear; select Yes (F2)
8.   Enter the password (if applicable) and press the green Enter key

The transaction will be voided/reversed. A receipt will print with the void/
reversal information.

Loyalty Functions   ## Issue Points

> *Note*   *Often it is necessary to scroll through the display screens*
> *to locate the correct option. In the steps below, this*
> *procedure will be displayed as:*
> ↓ + [Function Key]

1.   Navigate to ICARE GL (F3) | Loyalty (F2) | Issue Points (F2)
2.   Enter the employee number and press the green Enter key
3.   Swipe the card/manually enter card account number and press the green
     Enter key

> *Note*   *If a prompt for revenue center appears, select the*
> *intended revenue center for the transaction.*

4.   Enter the check number and press the green Enter key

> *Note*   *If a prompt for program selection appears, select the*
> *intended program for the transaction.*

5.   Enter the amount and press the green Enter key
6.   A prompt for Void or Reversal will appear; select No (F1)

If approved, the customer account will be credited with the loyalty points and a
customer receipt will be printed. This receipt should be presented to the
customer as a record of the transaction. If declined, an error message will
display on the terminal. The message may be cleared by pressing any button.

Point Balance Inquiry

Note	*Often it is necessary to scroll through the display screens to locate the correct option. In the steps below, this procedure will be displayed as:*

↓ + [Function Key]

1. Navigate to ICARE GL (F3) | Loyalty (F2) | Balance Inquiry (↓ + F3)
2. Enter the employee number and press the green Enter key
3. Swipe the card/manually enter card account number and press the green Enter key

Note	*If a prompt for program selection appears, select the intended program for the transaction.*

If the account is located, a point balance will be printed. This receipt should be presented to the customer as a record of the transaction. If no account is located, an error message will display on the terminal. The message may be cleared by pressing any button.

Lookup Customer by Phone/Name

1. Navigate to ICARE GL | Loyalty | Look By Phone (F4) *or* Lookup By Name (↓ + F1)
2. Enter the employee number and press the green Enter key
3. If searching by...
   a. customer phone number: enter the customer's phone number and press the green Enter key

Note	*Format must be **digits only;** no dashes.*
	Acceptable: 2125559465
	Unacceptable: 212-555-9465

   b. If searching by customer name, then enter the customer's *last* name and press the green Enter key (required); then enter the customer's *first* name and press the green Enter key (optional)

Note	*Last name **must** start with an alpha character*

If an account with the customer's information is located, then a receipt will be printed.

Point Voids and Reversals

Voids and/or reversals may occur for a number of reasons, like accidentally crediting the account with points from a different check or applying a stored value award toward incorrect receipts. Depending on how the system has been configured, point voids/reversals may require a password.

> *Note*   *Often it is necessary to scroll through the display screens to locate the correct option. In the steps below, this procedure will be displayed as:*
>   ↓ + [Function Key]

1. Navigate to ICARE GL (F3) | Loyalty (F2) | Issue Points (F2)
2. Enter the employee number and press the green Enter key
3. Swipe the card/manually enter card account number and press the green Enter key

> *Note*   *If a prompt for revenue center appears, select the intended revenue center for the transaction.*

4. Enter the check number and press the Enter key

> *Note*   *If a prompt for program selection appears, select the intended program for the transaction.*

5. Enter the amount and press the green Enter key
6. A prompt for Void or Reversal will appear; select Yes (F2)
7. Enter the password (if applicable) and press the green Enter key

The transaction will be voided/reversed. A receipt will print with the information.

General

Balance Transfer

The same Balance Transfer function may be used for both Loyalty Programs and Gift and Payment Programs.

> *Note*   *Often it is necessary to scroll through the display screens to locate the correct option. In the steps below, this procedure will be displayed as:*
>   ↓ + [Function Key]

1. Navigate to ICARE GL (F3) | Transfer Card (F4)

2. Enter the employee number and press the green Enter key

3. Swipe/manually enter the new card account number and press the green Enter key (destination card)

4. Swipe/manually enter the old card account number and press the green Enter key (source card)

Note	*If a prompt for program selection appears, select the intended program for the transaction.*

If successful, the balance will transfer from the old card (swiped second) to the first card (swiped first). A receipt will be printed and should be provided to the customer for his/her records. If unsuccessful, an error message will display on the terminal. The message may be cleared by pressing any button.

Accept Coupon

Note	*Often it is necessary to scroll through the display screens to locate the correct option. In the steps below, this procedure will be displayed as:*

↓ + [Function Key]

1. Navigate to ICARE GL (F3) | Accept Coupon (↓ + F1)

2. Enter the employee number and press the green Enter key

Note	*If a prompt for revenue center appears, select the intended revenue center for the transaction.*

3. Enter the check number and press the green Enter key

4. Enter the coupon number and press the green Enter key

5. Enter the amount associated with the coupon and press the green Enter key

6. A prompt for Void or Reversal will appear; select No (F1)

If successful, the check will be reduced by the amount entered into the Vx570. A receipt will be printed and should be provided to the customer for his/her records. If unsuccessful, an error message will display on the terminal. The message may be cleared by pressing any button.

In Conclusion...

The Vx570 has been fully configured to work with iCare Gift, Payment, & Loyalty. Using this manual, you should have been able to successfully:

◆ Configure the Portal to support VeriFone
◆ Setup the Vx570 to communicate with the iCare Data Center
◆ Download the iCare Software to the Vx570
◆ Begin performing transactions on the Vx570

You may now take advantage of the powerful iCare Customer Relationship Management solution for your enterprise.

If you need additional information or assistance, please contact your MICROS Account Representative or refer to one of the many documents which can be found on the MICROS Member Services website.