

MICROS SYSTEMS, INC

iCare Programming

Definitions, Suggestions, & Configuration

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This document contains the general definition of iCare Rules, programming flow, rule suggestions, steps to configure the most common programs, and additional programming details. The following details are geared towards setting up iCare programs and coupons in the portal; this document does not specifically reference configuration that must occur at the POS.

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INTRODUCTION TO ICARE

The primary function of iCare is to provide card programs that benefits the customers of a hospitality organization, examples are Gift Cards, Loyalty programs, and Employee Meal programs. To provide this functionality iCare must be configured with different programs, each program is tracked and reported \ separately within iCare reporting.

A program is a set of rules that defines how a group of account numbers function at the POS, such as tracking spend and awards earned by a customer or a Gift Card and it's purchases. All account numbers with the same preamble (i.e. number schema) linked to a program will have the same functionality online and at the POS. The following pages detail iCare Program configuration and programming tips.

Configuration in the mymicros.net Portal

The iCare side menu and iCare portlets should be configured for an organization that purchased iCare. For configuration, see ICARE| iCare Configuration| Programs, Cards, Coupons, and Rules.

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	

Note *Merchandise Redemption Rules are not covered in this document- See [Merchandise RedeemConfig](#) document for details. The configuration for Partners is covered under the 'Additional iCare Options' section of this document. Currency is not covered in this document, it only applies to organizations that support multiple currencies and is covered in the iCare Sys Admin guide.*

CONFIGURATION INTRODUCTION

iCare may be used in many different ways by each Organization. While there are common ways to configure programs and this document details the most frequently used programs and settings; each possible scenario that may be implemented is not covered in this document. The configuration options detailed in this document may be used in almost any combination to provide the desired program functions.

Consultation and verification with the Organization on the iCare programs to be implemented is encouraged and helps to ensure a successfully iCare implementation.

General Program Notes & this Document:

- Configuration steps in this document are the general settings for each program detailed. Options not referenced in this document are NOT required for that specific program. However, these options could be set to affect the program behavior.
- Each rule that is part of a program applies to all card rules linked to that program (I.e. each linked cards will function identically).
- Inherently in iCare, all rules and programs are available at all times and for each location.
 - Limitations to items or times are option configuration settings within Eligibility Rules.
 - Limitations to specific locations are optional settings when a Card Rule is linked to a program –or- when setting up a POS Key within iCare POS Configuration.

Overview of iCare Programs, Cards, Coupons and Rules

Programs- Defines the main functions of how a group of cards will act at the POS. Programs are a collection of rules detailing the functions of the accounts. Program types include Gift Cards, Meal Programs, Loyalty Programs, Award Programs (Stored Value earned through Loyalty), and Credit Cards.

Card Rules- Indicates account number schema. iCare supports a standard 16 digit iCard number, as well as card number schemas provided by non-MICROS organizations, called foreign cards. An account number can be on a card or key fob using magnetic stripe or barcode, as well as RFID, such as a wrist band.

Foreign card length, which includes a preamble, supports with 4 to 15 characters and 17- 24 characters.

Loyalty Rule- *Only linked to Loyalty programs*; rules that define how to earn points or receive awards. Configuration of the rules indicates the capabilities of the loyalty program during a POS transaction.

Point Issue Rule- Specific rules indicating how points are earned (visits, spend, items, etc...).

Award Rule- Specific rules indicating when, how awards are received, as well as the amount of the award.

Coupon Type- *Loyalty Award Option*. Rule to create a Coupon offer, with validity date ranges and defined discount amount.

Stored Value Bonus- Gift Card or Award Programs (Stored Value). Rules indicating bonus dollars to be given when a card is issued, reloaded, or redeemed.

Redemption Rule- Gift Card or Award Programs (Stored Value). Rules indicating limitations for when or what checks, items, or values can be redeemed- not required for implementing a Gift Card program; redemption rules are not frequently used.

Eligibility Rule- Defines when a transaction may occur at the POS. Eligibility Rules are “sub rules” which may be linked to Coupon Types, Loyalty Rules, Redemption Rules, and Stored Value Bonus Rules. Further definition of when a transaction may occur is configured through Edit Item Rules and Edit Time Rules.

Note *By default when an Eligibility Rule is created and no specific items or times are configured, all items and times are eligible during a transaction—only if an eligibility rule is edited to include specific items or times will the transaction require those items or times to be present.*

- An eligibility rule MUST be created and linked to the following rules:
 - Loyalty Points Issue Rule
 - Coupon Type (Redemption Eligibility Rule)
 - Redemption Rule

Without a linked eligibility rule points may not be earned, coupons may not be redeemed, and limiting a Stored Value Redemption will not occur.

- An eligibility rule is optional (i.e. not required) for the following rule:
 - Loyalty Award Rule
 - Most awards are triggered by point threshold, not eligible items or times.

However, an eligibility rule may be linked to a Loyalty Award Rule to require specific items or times when the award may be issued.

Edit Time Rule (within Eligibility Rules) - Indicates the specific time an iCare POS transaction can occur. Configuration of a Time Rule is not required for an iCare transaction.

Edit Item Rule (within Eligibility Rules) - Indicates the specific items or groups of items on an iCare POS transaction that are eligible in the transaction. Configuration of an Item Rule is not required for an iCare transaction.

POS Configuration- Required

configuration for some functions, such as Gift Cards, Loyalty Points and Awards, as well as Coupons—iCare functions that may be used at the POS. These keys or “buttons” should exist at the POS to allow these iCare functions. The POS record number does not need to be configured for all POS Request Codes.

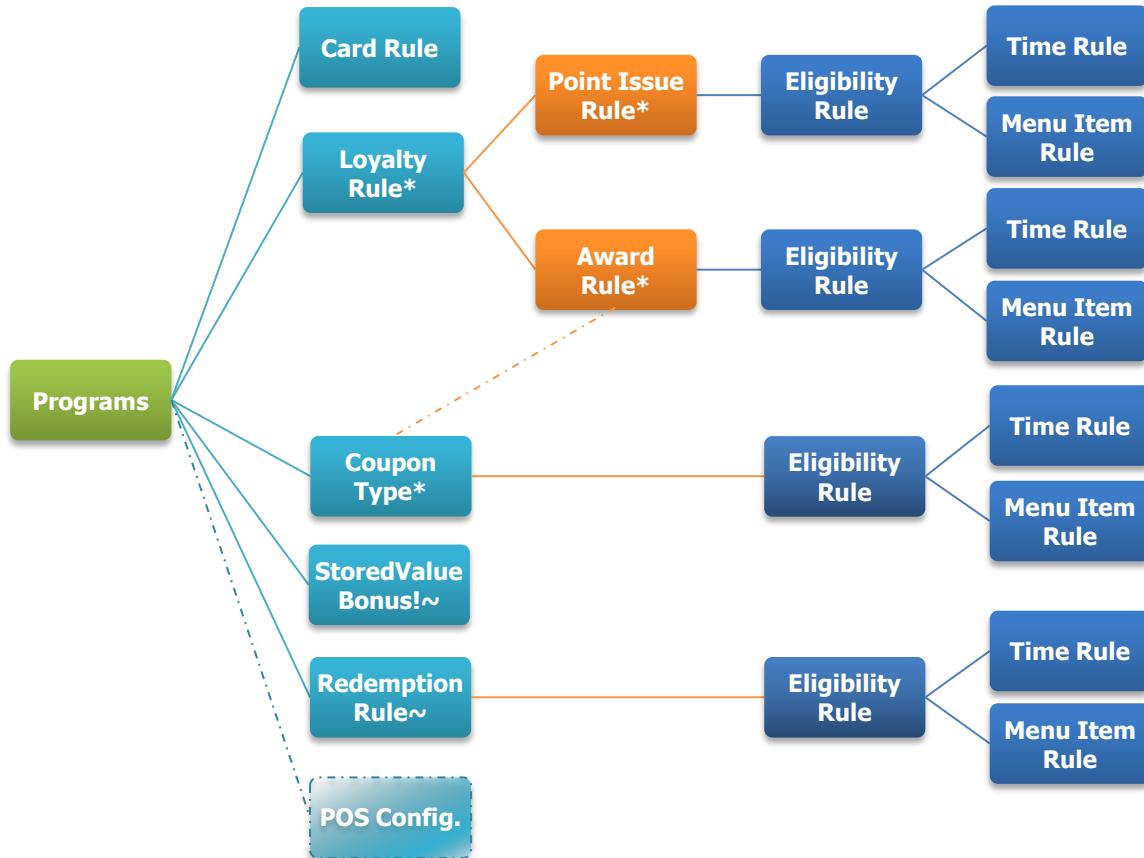
POS Request Code ▲	Active	Allow Offline
Coupon Inquiry	Yes	
Custom Message	Yes	
Point Balance	Yes	
Point Issue	Yes	
Accept Coupon	Yes	
Activate	Yes	
Balance Inquiry	Yes	
Balance Transfer	Yes	
Cash Out	Yes	
CRM Transaction	Yes	
Issue	Yes	
Issue Coupon	Yes	
Redemption	Yes	
Redemption Auth	Yes	
Reload	Yes	
Unique Item Inquiry	Yes	

The chart below details the POS

Request Codes that may require a POS Key (record number) to be configured—*NOTE that POS Keys configured with record numbers will vary based on the programs an organization is implementing.*

POS Request Codes	POS Key Type	Required for...	
		Gift/ SV Programs	Loyalty Programs
Point Issue	Tender		X
Immediate Discount <i>(Linked to Point Issue)</i>	Discount		X
Issue –or- Activate	Service Charge –or- Menu Item	X	
Redemption	Tender –or- Discount	X	
Redemption Auth <i>(Tips on GC)</i>	Tender	X	
Cash Out <i>(Cash out GC)</i>	Tender	X	
Accept Coupon	Discount		X
Issue Coupon	Tender		X

Relationship Hierarchy of iCare Rules



* Rules that only apply to Loyalty Programs

~ Rules that only apply to Gift Cards, Stored Value, or Award Programs

Note *POS Config is the configuration area where you indicate the Tenders, Service Charges, Menu Items, or Discounts configured at the POS, which should be linked to iCare Functions and transactions (Issue, Redemption, Point Issue, etc...).*

Hints & Suggestions

1. All Programs, regardless of the Program Type, MUST be linked to one or more Card Rules.
 - There is no limit to how many Card Rules may be linked to a program.
 - A program may have both iCard Card Rules and foreign Card Rules linked to it.
2. Help Files exist in the Action bar of most iCare configuration screens. Options and fields are detailed to assist while configuring programs.
3. When creating rules for a program, keep the naming convention for each rule similar— Editing and modifying a program is easier if each rule is consistently named.

EX 1: VIP Loyalty program- Program Name= VIP Loyalty, Loyalty Point Issue rule= VIP Points, Loyalty Award rule= VIP Award, Card Rule= VIP 5555 (5555 is the iCard preamble).

EX 2: Beer Club- Program Name= Beer Club, Loyalty Point Issue rule= Beers Tasted, Loyalty Award rule= Beer Club Award, Card Rule= BeerClub 1111 (1111 is the iCard preamble).
4. To add or change Items or Times eligible for a program, modify the eligibility rule(s) linked to the program Loyalty Rule(s).
 - Under Eligibility Rules highlight the correct Eligibility Rule, then 'Edit Time Rule' or 'Edit Item Rule'.
5. If an organization will be giving a new coupon award, add a **Coupon Type**
 - Creating a Coupon Type requires an Eligibility Rule to be linked in the 'Redemption Eligibility Rule' field.
6. When adding new **Loyalty Rules**
 - 'Points Issue Rules' are added or modified to determine a new way a program will earn points— multiple loyalty point issue rules may be configured and linked to each program.
 - Point Issue Rules must always have an Eligibility Rule linked.
 - 'Points Award Rules' are added or modified to determine how a program earns an award— multiple awards may be configured and linked to each program.
 - Point Award Rules don't always require an Eligibility Rule.
7. Print Text on a POS Check can be controlled by iCare
 - In iCare **POS Configuration** highlight a **POS Request Code** and select 'Edit POS Print Text'
 - Text, as well as Print Tokens specific to an account, may be added when a POS transaction occurs.
 - See the Help file in the 'Edit POS Print Text' screen for more details.

General Configuration Steps

The suggested general flow for creating iCare Programs are as follows:

1. If not previously created, add a Card Rule.
2. Add Program (Primary definition of the program- Gift/ Debit, Loyalty, Award, or Credit Card)
 - Program Name and Description may be changed at any time. Once saved, Program Code can't be changed- Program Code is not visible to customer account holders.
3. Add Eligibility Rule(s)
 - a. Only if a program is limited by time or day, 'Edit Time Rule'.
 - b. Only if a program is limited by menu item, family group, or major group, 'Edit Item Rule'.

Note *Eligibility Rule is REQUIRED for a Loyalty Point Issue Rule.*

Eligibility Rule is only linked to a Loyalty Award Rule IF the award is dependent on items or time.

4. Coupon Type- Add if an Organization is using/ issuing iCare Coupons as an award.

Note *An Eligibility Rule of Coupon Type is REQUIRED, linked to the Redemption Eligibility Rule field. Issue Eligibility Rule may be linked, but is rarely configured, only if issuing coupon is dependent on items or times.*

5. Add Loyalty Rule(s)

- a. Add 'Points Issue Rule' to determine how the program earns points. Multiple rules for earning points may be created for each program, for example Double Points Mondays.
- b. Add 'Points Award Rule' to determine how the program earns an award- multiple awards can be created for each program, for example customers earn a Birthday Award.

Note *Eligibility Rule is REQUIRED for a Loyalty Point Issue Rule.*

Eligibility Rule is only needed for a Loyalty Award Rule IF the award is dependent on items or time.

6. Redemption Rule- Only applies to Gift/ Stored Value.

- This rule is not frequently used and may be skipped in most instances. However, if a Gift/ Stored Value program(s) limits which days or menu items when a payment may be made, add a Redemption Rule.

7. Stored Value Bonus Rule- Only applies to Gift/ Stored Value.

- This rule is optional, allowing additional value to be added at no charge to the purchaser. Example- Holiday Gift Card Promotion- Purchase \$100, receive an additional \$20 at no charge—total amount to be issued = \$120.

8. Return to **Program Rules**- Previously configured rules must be linked to the program.

- Select the Program to link previously configured rules, selecting the correct Rule option in the Action bar. See chart below indicating which rules to link for each program type.

Rules to be Linked	Program Type		Notes
	Gift, Award, Stored Value	Loyalty (Points)	
Edit Card Rule	X	X	1 or more Card Rules must be linked to each program
Edit SV Bonus Rule	X		Link if Gift Card program earns bonus amounts
Edit Loyalty Rules		X	Link all necessary Point Issue and Award Loyalty Rules- These determine how points and awards are earned
Edit Redemption Rule	X		Link if Redemption is limited to specific items and/ or times

Note *Edit SM Rules is not covered in this document- See iCare Social Media Integration document. Edit Custom Transactions is not covered in this document and would only be configured by Professional Services.*

9. POS Configuration- Link the POS Tenders, Service Charges, Discounts, or Menu Items to be used by each iCare Programs:

- Each listed POS Request Code should be set to ACTIVE.
- To link a POS record/ object number, highlight the correct POS Request Code and select 'Edit POS Key'
- Click ADD and enter correct POS Key Type, enter Description, and POS record/object number created at the POS, select 'Reconcile with POS' the click SAVE.

Minimum Configuration Requirements

Listed below are the minimum configuration requirements for each major type of program. This may be used as a checklist verifying minimum requirements for a program have been met. For more details on program configuration, see *Configuring the Most Common Programs* and *Advanced Configuration*.

Stored Value (Gift Card)

1. Program- Type= Gift or Debit Card
2. Card Rule- Link to Program
3. POS Configuration- Edit POS Key, configure POS record number for:
 - a. Issue (Service Charge or Menu Item)
 - b. Reload (Service Charge or Menu Item)
 - c. Redemption (Tender)

Loyalty Program Earning Points & Award

1. Program- Type= Loyalty
2. Card Rule- Link to Program
3. Eligibility Rule- Type= Use with Loyalty Rule (for Points Issue Rule)
4. Loyalty Rules-
 - a. Points Issue Rule- link to Eligibility Rule
 - b. Points Award Rule
5. Link Loyalty Rules to Program
6. POS Configuration- Edit POS Key, configure POS record number for:
 - a. Point Issue (Tender)
 - b. Optional- if Immediate Discount Award
 - i. Add second entry for Point Issue (Discount)
 - ii. Link Program and Loyalty Award Rule
 - c. Optional- if Coupon Award
 - i. Accept Coupon (Discount)
 - ii. Link Coupon Type

Discount Card

1. Program- Type= Loyalty
2. Card Rule- Link to Program
3. Loyalty Rule-
 - a. Points Award Rule
4. Link Loyalty Rule to Program
5. POS Configuration- Edit POS Key, configure POS record number for:
 - a. Point Issue (Discount)
 - b. Link Program and Loyalty Award Rule

Continue to Next page for iCare POS Configuration details.

POS Configuration- POS Keys per Program

All POS Request codes in iCare should be set to Active. Only the following POS Keys, if used by a program, should have one or more POS Key and record number configured:

Program Type	POS Request Code	POS Key Type	Notes
SV/ Gift Card	Issue	Service Charge (suggested) -or- Menu Item	Selling a SV Card can be added to a POS check as either a Service Charge or Menu Item- Service Charge is more common. <i>NOTE: Activate is rarely used- Activate requires an additional step of pre-activating the account in the iCare portal before selling it at the POS.</i>
SV/ Gift Card	Reload		
SV/ Gift Card	Activate*		
SV/ Gift Card	Redemption	Tender	These keys are used to either: Make Payment on a POS check Cash Out a SV card Issue Points/ Apply Card to a POS check
SV/ Gift Card	Redemption Auth*		
SV/ Gift Card	Cash Out*		
Loyalty	Point Issue		
Loyalty (w/ Immediate Discount)	Point Issue	Discount	Open dollar discount should be configured at the POS if coupons or immediate discount(s) are a part of a loyalty program. Each program & coupon can use the same discount or different discounts.
Coupon	Accept Coupon		

** Optional- based on customer's need to provide these functions*

Standard Configuration to Add a POS Key

- Highlight POS Request Code to be edited
- Click EDIT POS KEY
- Click ADD
 - USE TYPE: 'Use Always'
 - DESCRIPTION: Easily Understandable Description of the function
 - POS KEY TYPE: See table above
 - POS KEY NUMBER: enter POS Record Number to be used during transaction
 - CARD RULE: Typically All
 - PROGRAM: Typically All
 - If ALL, this record number will apply to each program for this POS key
 - LOYALTY RULE, ORG LEVEL, REVENUE CENTER, COUPON TYPE: Typically All
 - Enable 'Reconcile with POS'
 - Click SAVE
- More than one POS Key can be configured for each POS Request Code
 - Example: Redemption of a sell-able Gift Card program may use Tender 101, but a Promo Gift Card program may use Tender 201.

Exceptions to Standard POS Key Configuration

Immediate Discount Award for a Loyalty Program

- ADD a second POS Key for *Point Issue*
 - POS KEY TYPE: Discount

- Follow same the standard steps above, except:
 - PROGRAM: Select specific Loyalty Program
 - LOYALTY RULE: Select the specific Points Award Rule
- Enable 'Reconcile with POS'
- Click SAVE

Accept Coupon

- ADD a POS Key for *Accept Coupon*
 - POS KEY TYPE: Discount
 - Follow same the standard steps above, except:
 - COUPON TYPE: Select the specific Coupon Type
 - Enable 'Reconcile with POS'
 - Click SAVE

Card Rule Configuration

All programs require that one or more card rules exist and are linked to the program. There is no limit to how many card rules may be linked to a single program. Typically new programs only have one card rule. However, programs moved from an existing provider to iCare may have 2 or more card rules linked to it; one or more card rules for the existing/ foreign card rule(s) and one for the iCard numbers that will be issued in the future.

iCare | iCare Configuration | Programs, Cards, Coupons, and Rules | Card Rules | Add

If card numbers have been issued by MICROS

- Enter Rule Name- Ex. Gift Card
- Check 'Is this an iCard?' option bit
- Click CREATE
- Card Program Number will be assigned
- Card Rule may be edited, such as changing the Name by adding the program number- Ex. Gift Card 1234

If the card numbers are Pre-existing 'Foreign' cards, then the card schema provided by the customer or card producer, which must include the preamble and number length is needed.

- Enter Rule Name- Ex. Card 5678 (5678= preamble)
- Check Digit Type- Usually leave 'Do Not Test..' unless check digit info provided
- Enter 'Foreign Card Preamble'- Supports up to 10 alpha-numeric characters
- Enter 'Foreign Card Length'- length includes the preamble
- Click SAVE

CONFIGURING THE MOST COMMON ICARE PROGRAMS

This section details for the most common configuration for iCare Gift Cards and Loyalty Award Programs.

Stored Value/ Gift Cards

Steps to configure a sell-able standard gift card, promo card, or donation gift card.

1. **Add CARD RULE:** If Cards to be used are already configured in iCare, this step may be skipped.

Multiple Card Rules can exist for each program. See the [Card Rule Configuration](#) section for configuration details.

2. **Add PROGRAM RULE:**

Add a program, for example 'Gift Card' or 'Promo Card'

GENERAL Tab- Options to be configured

- PROGRAM NAME, DESCRIPTION, and PUBLIC NAME: Use Similar name for each, one that should be easily understandable for the Program
- PROGRAM TYPE: 'Gift or Debit Card'
- PROGRAM CODE: Easily Understandable- Limited to 10 Characters- Not viewable to customers
- CREDIT and DEBIT REVERSAL: 'Same type, amount and check'

LOYALTY Tab should be grayed out

GIFT or DEBIT/ CREDIT/ AWARD PROGRAMS Tab

- All options are dependent upon the Organization's needs for gift cards
- Suggested Settings:
 - 'Allow Partial Redemption'- Allows redemption of current balance up to the requested amount sent from the POS
 - 'Allow Reload'- Allows additional value to be added to the gift card
 - 'Do Not Allow Issue/Reload and Redemption on Same Check'- Prevents issue/reload and redemption on same POS check
 - 'Transaction Limit'- Should be enabled with an amount such as 500, 1000, or 10,000. Limits the amount an individual card can be sold for at the POS during a transaction, preventing cards from being issued for erroneous high values
- Optional Settings, only if required by the Organization:
 - 'Allow for Cash Out'- Allows for a gift card to be cashed out for money—Option can be affected by the 'Cash Out Limit' setting, if configured
 - 'Reserve for Auth'- Reserves/ holds the remainder of a Gift Card balance, with the intent of the balance being used as tip. Amount is not used for payment within 8 hours will be made available for a later transaction— **This option is NOT required for a tip to be applied to a gift card**
 - 'Dormant Charge Start,' 'Dormant Charge Frequency,' and 'Dormant Charge'- Enable if the unused balance of a gift card should automatically decline after a specified period of time
 - i. Requires 'Expire Gift or Debit Account' sync
 - 'Valid Until Type,' 'Valid Until Period Type,' 'Valid Until Number Periods,' and 'Valid Until Date'- Enable to set an expiration date for the gift cards

- i. Requires 'Expire Gift or Debit Account' sync
- Click SAVE

3. PROGRAM RULES- Link Card Rule(s) to Program

- Select Gift Card program and click 'Edit Card Rules'
 - Select correct Card Rule and click Edit
 - Select All Locations or one specific location/ org level
 - Click SAVE

4. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Issue- Add POS Key entry
 - POS KEY TYPE: Typically Service Charger (Menu Item supported)
 - Enable 'Reconcile with POS'
 - Click SAVE
- Redemption- Add POS Key entry
 - POS KEY TYPE: Typically Tender (Discount is Supported)
 - Enable 'Reconcile with POS'
 - Click SAVE
- Redemption Auth- Tender type, only if customer will be accepting tip on Gift Card
 - Configure similar to Redemption

See the [POS Configuration- POS Keys per Program](#) section for additional details.

Expiration Sync Configuration:

If Expiration is configured, i.e. Validity configured, so a sync is required to run on a weekly or daily basis to changes the status of Gift Card accounts past their Validity date.

- Under Initial iCare GPL Setup... | DB Sync Schedule, click ADD
 - SYNC TYPE: 'Expire Gift or Debit Accounts'
 - SERVER NAME: Copy server name from another sync previous configured and running for the organization
 - Select appropriate SYNC TIME, SYNC TIME ZONE, and SYNC FREQUENCY
 - Complete any other required fields that may display
 - OTHER OPTIONS: Optional, May leave blank –or- may enter specific Gift Card Program Code
 - Click SAVE

Meal Cards/ Auto-Reload Debit Cards

Stored value cards that auto-reload with a set value on a scheduled basis, typically used for employee meal programs. Auto-reload is not tied to actual Credit Cards.

1. **Add CARD RULE:** If Cards to be used are already configured in iCare, this step may be skipped.

Multiple Card Rules can exist for each program. See the [Card Rule Configuration](#) section for configuration details.

2. **Add PROGRAM RULE:**

Add a program, for example 'Emp Meal Card'

GENERAL Tab- Options to be configured

- PROGRAM NAME, DESCRIPTION, and PUBLIC NAME: Use Similar name for each, one that should be easily understandable for the Program
- PROGRAM TYPE: 'Gift or Debit Card'
- PROGRAM CODE: Easily Understandable- Limited to 10 Characters- Not viewable to customers
- CREDIT and DEBIT REVERSAL: 'Same type, amount and check'

LOYALTY Tab should be grayed out

GIFT or DEBIT/ CREDIT/ AWARD PROGRAMS Tab

- PERIOD RELOAD AMOUNT: Required- Amount to auto-reload on scheduled basis
- All other options are dependent upon the Organization's needs for a meal card
- Suggested Settings:
 - 'Allow Partial Redemption'- Allows redemption of current card balance up to the requested amount sent from the POS
- Optional Settings, only if required by the Organization:
 - 'Require Customer on Redeem'- Card must be registered to a name to be redeemed, such as only Managers issue the card to a specific employee in the portal
 - 'Valid Until Type,' 'Valid Until Period Type,' 'Valid Until Number Periods,' and 'Valid Until Date'- Enable to set an expiration date for the meal card
- Click SAVE

3. **PROGRAM RULES- Link Card Rule(s) to Program**

- Select Gift Card program and click 'Edit Card Rules'
 - Select correct Card Rule and click Edit
 - Select All Locations or one specific location/ org level
 - Click SAVE

4. **DB SYNCs- Auto Reload Value**

- Under Initial iCare GPL Setup... | DB Sync Schedule, click ADD
 - SYNC TYPE: 'Limit and Reload Debit Accounts'
 - SERVER NAME: Copy server name from another sync previous configured and running for the organization
 - Select appropriate SYNC TIME, SYNC TIME ZONE, and SYNC FREQUENCY
 - Complete any other required fields that may display

- OTHER OPTIONS: Enter Program Code
 - Required- only one Program Code may be entered per Limit and Reload sync
- Click SAVE

5. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Redemption- Add POS Key entry
 - POS KEY TYPE: Typically Tender (Discount is Supported)
 - Enable 'Reconcile with POS'
 - Click SAVE
- Issue- Typically not needed for this program, as cards are usually issued through the portal, not at the POS

See the [POS Configuration- POS Keys per Program](#) section for additional details.

Coupons- Coupon Type Configuration

Coupons are a part of Loyalty and may be linked to a Loyalty program to be issued as an award. Coupons may also be configured to be issued in bulk for printing, through iCare CRM+ email, external email distribution, etc.

1. Add ELIGIBILITY RULE*

- RULE TYPE: 'Use with Coupon'
- NAME & DESCRIPTION: Easily Understandable for the Coupon being created
- ITEM RULE TYPE: Num of items in transaction
- ITEM QUANTITY: 1
- Click SAVE

** If the award will be specific to items or times, 'Edit Item Rule' or 'Edit Time Rule,' configuring the appropriate Items and Times.*

2. Add COUPON TYPE

- NAME & DESCRIPTION: Easily Understandable for the Coupon being created
- COUPON CODE: Easily Understandable for the Coupon being created
 - May not be edited once 1 or more coupons have been issued
- REDEMPTION ELIGIBILITY: Select newly create Coupon Eligibility Rule
- ISSUE INSTRUCTIONS: Typically 'Issue at POS Terminal'
- REDEEM INSTRUCTIONS: Typically 'Coupon Must be Present at POS'
- ALLOW MULTIPLE REDEMPTIONS: Typically NOT selected- Enabled based on Customer's requirements
- ISSUE ELIGIBILITY: Not required
- VALUE CALC METHOD: Based on Customer's requirements
 - Based on 'Value Calc Method' selection, edit required fields that display
- PRINT TEXT: Typically includes congratulator text, coupon info, as well as coupon serial number, which requires a Print Token
 - See the Help file in the 'Coupon Type' screen for more details, including available Print Tokens

- Print Text may not be edited once 1 or more coupons have been issued
- Optional Settings, only if required by the Organization:
 - EFFECTIVE FROM & TO: Optional- may be used to only allow the coupon to be issued during specific dates
 - VALID UNTIL Options: Optional- may be used to determine when the coupon is available to be redeemed, i.e. controls when a coupon will expire
 - SERIAL NUMBER FORMAT: Typically 'Numeric,' though serial numbers may be alpha or alpha-numeric
 - ALLOW AD HOC: Optional- Enabled if Organization will be using coupons individually or in bulk through the portal
 - ALLOW POS AD HOC: Optional- Enabled if Organization allows the coupon to be issued at will to an account through the POS—Typically used for store level customer service coupons

3. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Accept Coupon- Add POS Key entry
 - POS KEY TYPE: Discount
 - LOYALTY RULE: Award Loyalty Rule
 - Enable 'Reconcile with POS'
 - Click SAVE
- Issue Coupon- Optional- At POS prompts for loyalty card number & display a list of available coupons
 - Only supported with 3700

See the [POS Configuration- POS Keys per Program](#) section for additional details.

Discount Card

Loyalty accounts that receive an immediate discount each time the card is swiped at the POS. Typically these programs do not earn points.

1. Add CARD RULE: If Cards to be used are already configured in iCare, this step may be skipped.

Multiple Card Rules can exist for each program. See the [Card Rule Configuration](#) section for configuration details.

2. Add a PROGRAM RULE:

GENERAL Tab- Options to be configured

- PROGRAM NAME, DESCRIPTION, and PUBLIC NAME: Use Similar name for each, one that should be easily understandable for the Program, such as Visits.
- PROGRAM TYPE: Loyalty
- PROGRAM CODE: Easily Understandable- Limited to 10 Characters- Not viewable to customers
- CREDIT and DEBIT REVERSAL: Same type, amount and check

LOYALTY Tab

- LOYALTY POINTS NAME: Not required, suggest Active or Visits

- DEFAULT AWARD PROGRAM : None
- POINTS & ACCOUNT VALID UNTIL Options : Optional- based on Organization
- All other options are dependent upon the customer's needs for the discount program
- Suggested Settings:
 - 'Auto Create Loyalty Account'- First use at the POS will auto-create the account
- Click SAVE

3. Add LOYALTY RULES*:

IMPORTANT: Discount Programs do NOT need to earn points. The Organization's needs determine if points should be earned by a Discount Program.

There are 2 ways to configure Loyalty Rules for a Discount Program:

1. *No points will be earned- No Loyalty Point Issue Rule is needed*
2. *1 point earned per visit- A Loyalty Point Issue Rule is needed, but no point threshold is required for the award (See Optional Config below for additional programming).***

MAIN Tab

- TYPE: 'Points Award Rule'
- LOYALTY RULE NAME: Easily Understandable Name, should be consistent with Program and Eligibility Rule Name, stating it is the Award.
- PRECEDENCE: Suggest lower than 100
- ELIGIBILITY RULE*: Leave as 'Select Value'

** If the award will be specific to items or times, link the Eligibility Rule award rule previously created.*

AWARDS Tab

- USE POINTS TOTAL: Point Balance Total
- POINT THRESHOLD: 0 (zero)
- AWARD TYPE: Issue Immediate Discount
- AWARD DISCOUNT TYPE: Based on Customer's requirements
 - See Help Files for details on each Award Discount Type option
- POINT COST: 0 (zero)
- DISCOUNT & AWARD AMOUNT or DISCOUNT PERCENTAGE: Based on Customer's requirements
- Click SAVE

OPTIONAL CONFIG** Skip if no points will be earned for the Discount Program

- *ONLY if a point will be issued per visit, Click ADD to create another Loyalty Rule*
- *LOYALTY RULE: Select Points Issue Rule type*
 - *This will trigger the point to be issued*
 - *Optional to change the dropdowns for ORG LEVEL or CARD RULE- Suggest leaving the value at 'Select Value'*
 - *ORG LEVEL or CARD RULE options are only modified if the loyalty rule is limited to these options.*
- *Click SAVE*

4. PROGRAM RULES- Link Card Rule(s) & Loyalty Rules to Program

- Select Loyalty program and click 'Edit Card Rules'
 - Select correct Card Rule and click Edit
 - Select All Locations or one location
 - Click SAVE
- Select Loyalty program and click 'Edit Loyalty Rules'
 - Click ADD
 - LOYALTY RULE: Select Point Award Loyalty Rule
 - This will trigger the automatic discount award to be issued
 - Optional to change the dropdowns for ORG LEVEL or CARD RULE- Suggest leaving the value at 'Select Value'
 - ORG LEVEL or CARD RULE options are only modified if the loyalty rule is limited to these options.
 - Click SAVE

5. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Point Issue- Edit POS Key entry
 - POS KEY TYPE: Discount
 - PROGRAM: Select Correct Loyalty Program
 - LOYALTY RULE: Award Loyalty Rule
 - Enable 'Reconcile with POS'
 - Click SAVE
- **OPTIONAL CONFIG****
 - *ONLY if a point will be issued for a Discount Program and the point issue POS key is not already configured to issue points, add a second entry for Point Issue*
 - *POS KEY TYPE: Tender*
 - Enable 'Reconcile with POS'
 - Click SAVE

See the [POS Configuration- POS Keys per Program](#) section for additional details.

Loyalty Point Programs

Loyalty Programs are based on points. Points are a way of tracking POS transactions and assigning a value to the transaction. Awards may be given to loyalty accounts based on reaching a determined point threshold and/or for purchasing specific items during a specific time period. The following sections detail the configuration for the most common ways to earn points as well as the 3 award options that may be used with any loyalty points program.

1 Point per Visit

- Earn one point per visit/ transaction
- At a specific point threshold an award is received/ issued to the account

1. **Add CARD RULE:** If Cards to be used are already configured in iCare, this step may be skipped. Multiple Card Rules can exist for each program. See the [Card Rule Configuration](#) section for configuration details.
2. **Add a PROGRAM RULE:**

GENERAL Tab- Options to be configured

 - PROGRAM NAME, DESCRIPTION, and PUBLIC NAME: Use Similar name for each, one that should be easily understandable for the Program, such as Visits
 - PROGRAM TYPE: Loyalty
 - PROGRAM CODE: Easily Understandable- Limited to 10 Characters- Not viewable to customers
 - CREDIT and DEBIT REVERSAL: Same type, amount and check

LOYALTY Tab

 - LOYALTY POINTS NAME: visit(s)
 - DEFAULT AWARD PROGRAM : None
 - POINTS & ACCOUNT VALID UNTIL Options : Optional, based on Organization
 - Suggested Settings:
 - 'Auto Create Loyalty Account'- First Point Issue at POS will auto-create the account
 - All other options are dependent upon the Organization's needs for the program
 - Click SAVE- 3. **Add ELIGIBILITY RULES:***
 - Create Eligibility Rule for Point Issue
 - RULE TYPE: 'Use with Loyalty Rule'
 - NAME & DESCRIPTION: Easily Understandable, similar to Program Name
 - ITEM RULE TYPE: Number of items in transaction
 - ITEM QUANTITY: 1
 - Item Quantity should be set to 1 so that points will only be earned if 1 or more items have been rung on the check
 - Click SAVE

- If no specific Items or Times are required to earn points, Eligibility Rule configuration for earning points is complete— If specific items or times are required, configure ‘Edit Item Rules’ and/or ‘Edit Time Rules’
 - * *If the award will be specific to items or times, a second Eligibility Rule should be created for the Loyalty Award Rule. Configure the appropriate Items and Times. See the Award Options for configuration details.*

4. Add LOYALTY RULES:

- ADD a Loyalty Rule to indicate how points are earned
 - MAIN Tab
 - TYPE: ‘Points Issue Rule’
 - LOYALTY RULE NAME: Easily Understandable Name, should be consistent with Program and Eligibility Rule Name.
 - PRECEDENCE: Suggest lower than 100
 - PRINT POINTS UNTIL AWARD: Enable
 - ELIGIBILITY RULE: Required- Select points Eligibility Rule Previously created
 - POINTS Tab
 - POINT CALC METHOD TYPE: Typically ‘Per Visit’
 - Other Options:
 - ‘If any selected on check’- Requires eligible items to be configured in the Eligibility Rule
 - POINT FACTOR, ADDITIONAL POINTS, and POINT MULTIPLIER: Should be blank
 - USE POINTS TOTAL: Point Balance Total
 - Click SAVE
 - ADD another Loyalty Rule for the Award to be given at a specific point threshold
 - MAIN Tab
 - TYPE: ‘Points Award Rule’
 - LOYALTY RULE NAME: Easily Understandable Name, should be consistent with Program and Eligibility Rule Name, stating it is the Award.
 - PRECEDENCE: Suggest lower than 100
 - ELIGIBILITY RULE: Typically ‘Select Value’ *
 - * *If the award will be specific to items or times, link the Eligibility Rule award rule previously created.*
 - AWARDS Tab
 - USE POINTS TOTAL: Typically ‘Point Balance Total’
 - POINT THRESHOLD: Based on Customer’s requirements
 - If set, award will be automatically given at this point threshold
 - If set as zero, award is based on time period, such as birthday, or for purchase of a specific item, such as buy to apps, one is free

- AWARD TYPE: See Award Options for configuration details- [Immediate Discount Award](#), [Stored Value Award](#), or [Coupon Award](#).

5. PROGRAM RULES- Link Card Rule(s) & Loyalty Rules to '1 Point per Visit' Program

- Select Loyalty program and click 'Edit Card Rules'
 - Select correct Card Rule and click Edit
 - Select All Locations or one location
 - Click SAVE
- Select Loyalty program and click 'Edit Loyalty Rules'
 - Click ADD
 - LOYALTY RULE: Select Point Issue Loyalty Rule
 - This will trigger the points to be earned during POS transactions
 - Optional to change the dropdowns for ORG LEVEL or CARD RULE- Suggest leaving the value at 'Select Value'
 - ORG LEVEL or CARD RULE options are only modified if the loyalty rule is limited to these options
 - Click SAVE
 - Click ADD again
 - LOYALTY RULE: Select Award Loyalty Rule
 - This will trigger the automatic discount award to be issued
 - Optional to change the dropdowns for ORG LEVEL or CARD RULE- Suggest leaving the value at 'Select Value'
 - ORG LEVEL or CARD RULE options are only modified if the loyalty rule is limited to these options
 - Click SAVE
 - If there are multiple Point Issue Loyalty Rules, such as Double Points, or multiple Award Rules, such as Birthday Award, repeat steps until all necessary Loyalty Rules are linked to the program

6. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Point Issue- Add POS Key entry to earn points
 - POS KEY TYPE: Tender
 - Enable 'Reconcile with POS'
 - Click SAVE

See the [POS Configuration- POS Keys per Program](#) section for additional details.

1 Point per Item Purchased

- Earn one point per Item Purchased, such as a Coffee Club or Sandwich Club.
- At a specific point threshold, an award is issued

Note *This is not the Round Robin/ Beer Club program, where only unique items are tracked. See the [RoundRobinLoyalty Config](#) document for details.*

1. **Add CARD RULE:** If Cards to be used are already configured in iCare, this step may be skipped.

Multiple Card Rules can exist for each program. See the [Card Rule Configuration](#) section for configuration details.

2. **Add a PROGRAM RULE:**

GENERAL Tab- Options to be configured

- PROGRAM NAME, DESCRIPTION, and PUBLIC NAME: Use Similar name for each, one that should be easily understandable for the Program, such as Items Purchased.
- PROGRAM TYPE: Loyalty
- PROGRAM CODE: Easily Understandable- Limited to 10 Characters- Not viewable to customers
- CREDIT and DEBIT REVERSAL: Same type, amount and check

LOYALTY Tab

- LOYALTY POINTS NAME: item(s)
- DEFAULT AWARD PROGRAM : None
- POINTS & ACCOUNT VALID UNTIL Options : Optional, based on Organization
- Suggested Settings:
 - ‘Auto Create Loyalty Account’- First Point Issue at POS will auto-create the account
 - All other options are dependent upon the Organization’s needs for the program
- Click SAVE

3. **Add ELIGIBILITY RULES:***

- RULE TYPE: ‘Use with Loyalty Rule’
- NAME & DESCRIPTION: Easily Understandable, similar to Program Name
- ITEM RULE TYPE: Number of items in transaction
- ITEM QUANTITY: 1
 - Item Quantity should be set to 1 so points will only be earned if 1 or more items are on the POS check.
- Click SAVE
- If no specific Items or Times are required to earn points, Eligibility Rule configuration for earning points is complete— If specific items or times are required, configure ‘Edit Item Rules’ and/or ‘Edit Time Rules’

** If the award will be specific to items or times, a second Eligibility Rule should be created for the Loyalty Award Rule. Configure the appropriate Items and Times.*

4. Add LOYALTY RULES:

- ADD a Loyalty Rule to indicate how points are earned.

MAIN Tab

- TYPE: 'Points Issue Rule'
- LOYALTY RULE NAME: Easily Understandable Name, should be consistent with Program and Eligibility Rule Name
- PRECEDENCE: Suggest lower than 100
- PRINT POINTS UNTIL AWARD: Enable
- ELIGIBILITY RULE: Select Eligibility Rule Previously created

POINTS Tab

- POINT CALC METHOD TYPE: Typically 'Number of Selected Items'
 - Other Options:
 - 'New items this period'- Requires Eligibility Time Rule period configuration
 - 'Number of unique selected items'- Only used for Round Robin Programs
- POINT FACTOR, ADDITIONAL POINTS, and POINT MULTIPLIER: Should be blank
- USE POINTS TOTAL: Point Balance Total
- Click SAVE
- ADD another Loyalty Rule for the Award to be given at a specific point threshold

MAIN Tab

- TYPE: 'Points Award Rule'
- LOYALTY RULE NAME: Easily Understandable Name, should be consistent with Program and Eligibility Rule Name, stating it is the Award
- PRECEDENCE: Suggest lower than 100
- ELIGIBILITY RULE: Typically 'Select Value'*

** If the award will be specific to items or times, link the Eligibility Rule award rule previously created.*

AWARDS Tab

- USE POINTS TOTAL: Typically 'Point Balance Total'
- POINT THRESHOLD: Based on Customer's requirements
 - At this point threshold the award will be automatically issued
 - If award is based on check items or time period, such as birthday, point threshold may be zero (0)
- AWARD TYPE: See Award Options for configuration details- [Immediate Discount Award](#), [Stored Value Award](#), or [Coupon Award](#).

5. PROGRAM RULES- Link Card Rule(s) & Loyalty Rules to '1 Point per Item Purchased' Program

- Select Loyalty program and click 'Edit Card Rules'
 - Select correct Card Rule and click Edit

- Select All Locations or one location
- Click SAVE
- Select Loyalty program and click 'Edit Loyalty Rules'
 - Click ADD
 - LOYALTY RULE: Select Point Issue Loyalty Rule
 - This will trigger the points to be earned during POS transactions
 - Optional to change the dropdowns for ORG LEVEL or CARD RULE- Suggest leaving the value at 'Select Value'
 - ORG LEVEL or CARD RULE options are only modified if the loyalty rule is limited to these options
 - Click SAVE
 - Click ADD again
 - LOYALTY RULE: Select correct Award Loyalty Rule
 - Click SAVE
 - If there are multiple Point Issue Loyalty Rules, such as Double Points, or multiple Award Rules, such as Birthday Award, repeat steps until all necessary Loyalty Rules are linked to the program.

6. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Point Issue- Add POS Key entry
 - POS KEY TYPE: Tender
 - Enable 'Reconcile with POS'
 - Click SAVE

See the [POS Configuration- POS Keys per Program](#) section for additional details.

1 Point per Dollar Spent

- For every dollar spent, 1 point is earned
- At a specified point threshold an award will be earned

1. **Add CARD RULE:** If Cards to be used are already configured in iCare, this step may be skipped. Multiple Card Rules can exist for each program. See the [Card Rule Configuration](#) section for configuration details.
2. **Add a PROGRAM RULE:**

GENERAL Tab- Options to be configured

- PROGRAM NAME, DESCRIPTION, and PUBLIC NAME: Use Similar name for each, one that should be easily understandable for the Program, such as Points
- PROGRAM TYPE: Loyalty
- PROGRAM CODE: Easily Understandable- Limited to 10 Characters- Not viewable to customers
- CREDIT and DEBIT REVERSAL: Same type, amount and check

LOYALTY Tab

- LOYALTY POINTS NAME: points
- DEFAULT AWARD PROGRAM : None
- POINTS & ACCOUNT VALID UNTIL Options : Optional, based on Organization
- Suggested Settings:
 - ‘Auto Create Loyalty Account’- First Point Issue at POS will auto-create the account
 - All other options are dependent upon the Organization’s needs for the program
- Click SAVE

3. **Add ELIGIBILITY RULE*:**

- RULE TYPE: ‘Use with Loyalty Rule’
- NAME & DESCRIPTION: Easily Understandable, similar to Program Name
- ITEM RULE TYPE: Number of items in transaction
- ITEM QUANTITY: 1
 - Item Quantity should be set to 1 so that points will only be earned if 1 or more items have been rung on the check
- Click SAVE
- If no Items or Times are required to earn points, Eligibility Rule configuration for earning points is complete- If required, configure ‘Edit Item Rules’ and/or ‘Edit Time Rules’

** If the award will be specific to items or times, a second Eligibility Rule should be created for the Award. Configure the appropriate Items and Times.*

4. **Add LOYALTY RULES:**

- ADD a Loyalty Rule to indicate how points are earned.

MAIN Tab

- TYPE: ‘Points Issue Rule’

- LOYALTY RULE NAME: Easily Understandable Name, should be consistent with Program and Eligibility Rule Name.
- PRECEDENCE: Suggest lower than 100
- PRINT POINTS UNTIL AWARD: Enable
- ELIGIBILITY RULE: Select Eligibility Rule Previously created

POINTS Tab

- POINT CALC METHOD TYPE: Typically 'Per Check Value'
 - Other Options:
 - 'Value of Selected Items' - Requires Eligibility Item Rule is configured with one or more item; only issues points based on value of eligible items
 - 'Per check value of and selected...' - Requires Eligibility Item Rule is configured with one or more item
 - 'Per defined check value' - Issues points based on increments spent, e.g. 1 point earned for each \$5 spent
- POINT FACTOR, ADDITIONAL POINTS, and POINT MULTIPLIER: Should be blank
- USE POINTS TOTAL: Point Balance Total
- Click SAVE
- ADD another Loyalty Rule for the Award to be given at a specific point threshold

MAIN Tab

- TYPE: 'Points Award Rule'
- LOYALTY RULE NAME: Easily Understandable Name, should be consistent with Program and Eligibility Rule Name, stating it is the Award.
- PRECEDENCE: Suggest lower than 100
- ELIGIBILITY RULE: Typically 'Select Value'*

** If award will be specific to items or times, link the previously created award Eligibility Rule.*

AWARDS Tab

- USE POINTS TOTAL: Point Balance Total
- POINT THRESHOLD: Based on Customer's requirements
 - At this point threshold the award will be automatically issued
 - If award is based on check items or time period, such as birthday, point threshold may be zero (0)
- AWARD TYPE: See Award Options for configuration details: [Immediate Discount Award](#), [Stored Value Award](#), or [Coupon Award](#).

5. PROGRAM RULE- Link Card Rule(s) & Loyalty Rules to '1 Point per Dollar Spent' Program

- Select Loyalty program and click 'Edit Card Rules'
 - Select correct Card Rule and click Edit
 - Select All Locations or one location
 - Click SAVE
- Select Loyalty program and click 'Edit Loyalty Rules'
 - Click ADD
 - LOYALTY RULE: Select Point Issue Loyalty Rule

- This will trigger the points to be earned during POS transactions
- Optional to change the dropdowns for ORG LEVEL or CARD RULE- Suggest leaving the value at 'Select Value'
 - ORG LEVEL or CARD RULE options are only modified if the loyalty rule is limited to these options
- Click SAVE
- Click ADD again
- LOYALTY RULE: Select correct Award Loyalty Rule
- Click SAVE
- If there are multiple Point Issue Loyalty Rules, such as Double Points, or multiple Award Rules, such as Birthday Award, repeat steps until all necessary Loyalty Rules are linked to the program.

6. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Point Issue- Add POS Key entry
 - POS KEY TYPE: Tender
 - Enable 'Reconcile with POS'
 - Click SAVE

See the [POS Configuration- POS Keys per Program](#) section for additional details.

Loyalty Award Options

Awards are a part of Loyalty Programs. An award is given based on an account reaching a point threshold, the time of day, the items purchased, etc... There are 3 types of awards iCare loyalty account holders may receive: an immediate discount, stored value, and a coupon.

Immediate Discount Award

Award is automatically applied to a POS check when either reaching a specific point threshold, purchasing specific item(s), or during a specific time of day.

1. Add/ Edit LOYALTY RULES:

- Configuration based on Customer's requirements and previous configuration of the Program and Loyalty Point Issue Rule(s)

AWARDS Tab

- AWARD TYPE: 'Issue Immediate Discount'
- AWARD DISCOUNT TYPE: Based on Customer's requirements
- POINT COST: Based on Customer's requirements
 - If a cost is entered, this number of points will automatically be deducted from the account when the award is issued
- DISCOUNT & AWARD AMOUNT or DISCOUNT PERCENTAGE: Based on Customer's requirements
- *Optional-* CROSS POINT THRESHOLD: Only used if there is NO POINT COST with the Award- points will continue to accrue
- Click SAVE

2. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Point Issue- Edit POS Key
 - Click ADD
 - POS KEY TYPE: Discount
 - PROGRAM: Select correct Loyalty program
 - LOYALTY RULE: Select correct Loyalty AWARD Rule
 - Enable 'Reconcile with POS'
 - Click SAVE

See the [POS Configuration- POS Keys per Program](#) section for additional details.

Return to Loyalty Point Configuration, click [1 Point per Visit](#), [1 Point per Item Purchased](#), or [1 Point per Dollar Spent](#).

Stored Value Award

Loyalty programs with a Stored Value award are typically called 'Points to Dollars.' The Stored Value Award Program is redeemed similar to a Gift Card. The Award Program is automatically issued to a loyalty account during a POS transaction when either an account reaches a specific point threshold, purchases specific item(s), or during a specific time of day.

1. Add/ Edit LOYALTY RULES:

- Configuration based on Customer's requirements and previous configuration of the Program and Loyalty Point Issue Rule(s).

AWARDS Tab

- AWARD TYPE: 'Issue stored value credit'
- POINT COST: Based on Customer's requirements
 - If a cost is entered, this number of points will automatically be deducted from the account when the award is issued
- DISCOUNT & AWARD AMOUNT: Based on Customer's requirements
- *Optional-* CROSS POINT THRESHOLD: Only used if there is NO POINT COST with the Award- points will continue to accrue
- Click SAVE

2. PROGRAM RULE- Link Card Rule(s) to 'Award' Program

- Select Award program and click 'Edit Card Rules'
 - Select same Card Rule(s) linked to the Loyalty Program
 - Select All Locations or one location
 - Click SAVE
 - Repeat step 2 if more than one Card Rule is linked to the Loyalty Program that earns the Stored Value Award

3. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Redemption- Edit POS Key
 - The same POS record number may be used as Gift Card. If not, Click ADD
 - POS KEY TYPE: Based on Customer's requirements, may be Tender or Discount
 - PROGRAM: Select correct Award program
 - Enable 'Reconcile with POS'
 - Click SAVE

See the [POS Configuration- POS Keys per Program](#) section for additional details.

Return to Loyalty Point Configuration, click [1 Point per Visit](#), [1 Point per Item Purchased](#), or [1 Point per Dollar Spent](#).

Coupon Award

Coupon award is automatically issued to an account when a purchase is made reaching a specific point threshold, purchase of a specific item(s), or during a specific time of day.

- Configuration based on Customer's requirements and previous configuration of the Program and Loyalty Point Issue Rule(s)

1. Add ELIGIBILITY RULE*

- RULE TYPE: 'Use with Coupon'
- NAME & DESCRIPTION: Easily Understandable for the Coupon being created
- ITEM RULE TYPE: Num of items in transaction
- ITEM QUANTITY: 1
- Click SAVE

** If the award will be specific to items or times, 'Edit Item Rule' or 'Edit Time Rule,' configuring the appropriate Items and Times.*

2. Add COUPON TYPE

- NAME & DESCRIPTION: Easily Understandable for the Coupon being created
- COUPON CODE: Easily Understandable for the Coupon being created
 - May not be edited once 1 or more coupons have been issued.
- REDEMPTION ELIGIBILITY: Select newly create Coupon Eligibility Rule
- ISSUE INSTRUCTIONS: Typically 'Issue at POS Terminal'
- REDEEM INSTRUCTIONS: Typically 'Coupon Must be Present at POS'
- ALLOW MULTIPLE REDEMPTIONS: Typically NOT selected- Enabled based on Customer's requirements
- ISSUE ELIGIBILITY: Not required
- VALUE CALC METHOD: Based on Customer's requirements
 - Based on 'Value Calc Method' selection, edit required fields that display
- PRINT TEXT: Typically includes congratulator text, coupon info, as well as coupon serial number, which requires a Print Token.
 - See the Help file in the 'Coupon Type' screen for more details, including available Print Tokens.
 - Print Text may not be edited once 1 or more coupons have been issued.
- Optional Settings, only if required by the Organization:
 - EFFECTIVE FROM & TO: Not required, but may be used to only allow the coupon to be issued during specific dates.
 - VALID UNTIL Options: Not required, but may be used to determine when the coupon is available to be redeemed, i.e. controls when a coupon will expire.
 - SERIAL NUMBER FORMAT: Typically 'Numeric'
 - ALLOW AD HOC: Optional, may be enabled if Organization will be using coupons individually or in bulk through the portal
 - ALLOW POS AD HOC: Options, may be enabled if Organization allows the coupon to be issued at will to an account through the POS. Typically used for store level customer service coupons.

3. Add/ Edit LOYALTY RULES:

AWARDS Tab

- AWARD TYPE: 'Issue coupon'
- POINT COST: Based on Customer's requirements
 - If a cost is entered, this number of points will automatically be deducted from the account when the award is issued
- COUPON CODE: Enter the Coupon Code, exactly as entered in the Coupon Type
- *Optional-* CROSS POINT THRESHOLD: Only used if there is NO POINT COST with the Award- points will continue to accrue
- Click SAVE

4. POS CONFIGURATION

Update POS Request Codes, adding the record numbers created in the POS:

- Accept Coupon- Edit POS Key
 - Click ADD
 - POS KEY TYPE: Discount
 - COUPON TYPE: Select correct Coupon
 - Enable 'Reconcile with POS'
 - Click SAVE

See the [POS Configuration- POS Keys per Program](#) section for additional details.

Return to Loyalty Point Configuration, click [1 Point per Visit](#), [1 Point per Item Purchased](#), or [1 Point per Dollar Spent](#).

ADVANCED CONFIGURATION

Below are details on some of the more advanced iCare functions that may be configured. These options are typically additional functions, features, and awards that are configured in conjunction with the core program, such as 1 Point per Visit, 1 Point per Dollar, etc...

Precedence Overview

Precedence is most commonly used for Loyalty, specifically for Loyalty Rules when earning points or awards. During a POS transaction iCare precedence is read from highest to lowest, applying the Loyalty Rule(s) with the highest precedence first.

Loyalty Point Issue Rules

More than one Point Issue rule may apply to a single transaction, e.g. multiple Point Issue rule may apply to a single transaction, determining how many points are earned during the transaction.

- Basic Point Rule- Typically the highest precedence
- Multiplier/ Double Points Rule- Typically the middle precedence
- Third Point Issue Rule, such as extra points per item- Typically the lowest precedence

Loyalty Award Rules

Only one Award rule may apply to a single transaction, e.g. multiple Award rules may be configured and apply to a single transaction, but only one Award rule, the one with the highest precedence that is eligible for that transaction will apply during the transaction.

Example: A program that is tiered, e.g. has three levels of awards based on the points earned

- Award/Tier Level 1: 100 points, earn \$5 of Stored Value, Precedence = 80
- Award/Tier Level 2: 200 points, earn \$10 of Stored Value, Precedence = 85
- Award/Tier Level 3: 300 points, earn \$15 of Stored Value, Precedence = 90
- Birthday Award: 10% Immediate Discount, Precedence = 99

Note Point Issue Precedence is not related to Award Precedence.

Point Multipliers/ Tiered Programs

Configuring a Loyalty Program to earn 1 point, then at specific intervals points are earned more quickly. Such as at 100 points, the 1.25 points are earned, then at 500 points 1.5 points, are earned.

During a POS transaction, each Loyalty Point Issue Rule for the iCare Program will be reviewed. All Point Issue Rule applicable to the transaction will be used to calculate points (For example only 1 rule may apply to the transaction or 3 rules may apply to the transaction). Precedence of the Loyalty Point Issue Rules is very important; it affects which Point Issue Rules will apply.

- Once the Loyalty Program is created, the Program will have more than one point issue rule. In this example, Tier 1- 3 are the point issue Loyalty Rules.

Loyalty Rule ▲	Org Level ▲	Card Rule ▲
Award		
Tier 1		
Tier 2		
Tier 3		
▪ Tier 1- Highest Precedence, such as 95		
▪ Tier 2- Second highest Precedence, such as 90		
▪ Tier 3- Third highest Precedence, such as 85		

Note *Point Issue Precedence is not related to Award Precedence. Award Precedence may be set to any value; it is only affected by the precedence of other Award Rules linked to the same Program.*

2. ELIGIBILITY RULE

- Typically only 1 Eligibility Rule is needed for each of the Point Issue Rules. If one Eligibility Rule, this assumes points are earned for the same items and times, but the velocity of how many points are earned per Tier increases.

5. Create first LOYALTY POINT ISSUE RULE

- Link Eligibility Rule
- PRECEDENCE: Highest of each Loyalty Point Issue rule
- POINT CALC METHOD: Based on Organizations requierments
 - The base Point Issue Rule, such as 1 point per dollar spent (i.e. per check value)
- POINTS ROUND TO NEAREST: Optional, per Organization's Requirements
 - If point rounding is needed, only this point issue rule needs rounding enabled

POINTS tab

- POINT CALC METHOD: Based on organization's needs, Ex- per check value

6. Create second LOYALTY POINT ISSUE RULE

- Link Eligibility Rule
- PRECEDENCE: Lower than previous Loyalty Point Issue Rule

- Rounding should not be enabled in this rule or any multiplier rule

POINTS tab

- POINT CALC METHOD: Use Multiplier if Threshold Exceeded
- POINT MULTIPLIER- Set as customer desires
 - Example:
 - If Multiplier = .25, 1.25 points will be earned per dollar spent. If Multiplier = .50, 1.50 points will be earned per dollar spent.

7. Continue to add LOYALTY POINT ISSUE RULES for each Multiplier level

- Each Multiplier Rule should have a lower Precedence than the previous rule.

8. Link Loyalty Rules to Program- PROGRAMS

- Select Loyalty program and click 'Edit Loyalty Rules'
- ADD each Point Issue Rule
 - Optional to change the dropdowns for ORG LEVEL or CARD RULE- Suggest leaving the value at 'Select Value'
 - ORG LEVEL or CARD RULE options are only modified if the loyalty rule is limited to these options.
- Click SAVE

9. POS CONFIGURATION- Only Standard Point Issue Configuration required

Birthday “Benefits”

Birthday “benefits” are additional rules configured and linked to an existing Loyalty Program. Only Loyalty Programs may have a birthday award, stored value programs can’t have a birthday rule.

There are 3 options for Birthday “benefits.” These options require that a POS transaction occurs for the birthday “benefit” to be given to an account holder:

1. Birthday Award- Immediate Discount, Stored Value, or Coupon
2. Additional Points- X additional points for a birthday
3. Double Points- Customer earns double (or Triple) points for a birthday

Configuring Awards (discounts, stored value, etc..) are suggested, as there is more control and flexibility when a customer may be eligible to receive the birthday award. However, additional points may be given for a Birthday, instead of an award. This option is less flexible- allowing additional birthday points to only be given within a few days of the actual birthday, not within weeks of the actual birthday.

[Birthday Awards](#)

1. Create ELIGIBILITY RULE

- Rule Type= Use with Loyalty Rule
- Item Rule Type= Num Items in Transaction
- **Item Quantity= 1 (must be 1 or greater)**

2. ‘Edit Time Rules’ of the new Birthday Eligibility Rule

- Add a Time Rule
 - Type= Birthday Anniversary Rule
 - Set Period Range Type (Days, Weeks, Months)
 - Set Periods Before or After- this is the number of Days/ Weeks, etc, before and after a customer birth date where the award can be given during a POS transaction.
 - Examples- 0= only day of birthday, 1= day/week before birthday, day/week of birthday, and day/week after birthday

3. Create LOYALTY RULE

MAIN Tab

- Type= Points Award Rule
- Precedence= **Highest precedence** of the Award Rules for the Loyalty Program
- Eligibility Rule= Birthday Eligibility Rule

AWARDS Tab

- Use Points Total= Point Balance Total
- Point Threshold= 0
- Point Cost= Blank or 0
- Award Type and supporting amount, coupons, etc, based on the award that will be given.
- Once Per Year= Enabled

- This option must be set or customers could receive the birthday award more than once a year.

4. PROGRAMS- edit the Loyalty Program

- Edit Loyalty Rules- Link Birthday Loyalty Rule to the Program

5. AWARD

- **If Award= Immediate Discount**

- POS Configuration- Edit 'Point Issue' POS Key
- Add Birthday Award Discount
 - POS Key Type= Discount
 - Enter correct POS Key Number and Description
 - Loyalty Rule= Birthday Loyalty Rule
 - Reconcile with POS= Enabled

- **If Award= Coupon**

- POS Configuration- Edit 'Accept Coupon' POS Key
- Add Birthday Coupon Discount
 - POS Key Type= Discount
 - Enter correct POS Key Number and Description
 - Coupon Type= Birthday Coupon
 - Reconcile with POS= Enabled
 - Reconcile with POS= Enabled

- **If Award= Stored Value**

- No need to create a new POS key, POS key should already be setup for redemption of Award Stored Value.

Additional Points for a Birthday

1. Create ELIGIBILITY RULE

- Rule Type= Use with Loyalty Rule
- Item Rule Type= Num Items in Transaction
- **Item Quantity= 0 (must be 0)**

2. 'Edit Time Rules' of the new Birthday Eligibility Rule

- Add a Time Rule
 - Type= Birthday Anniversary Rule
 - Set Period Range Type (Days, Weeks, Months)
 - Set Periods Before or After- this is the number of Days/ Weeks, etc, before and after a customer birth date where the award can be given during a POS transaction.
 - Examples- 0= only day of birthday, 1= day/week before birthday, day/week of birthday, and day/week after birthday.

3. Create a LOYALTY RULE

MAIN Tab

- Type= Points Issue Rule

- Precedence= **Lowest precedence** of the Point Issue Rules for the Loyalty Program
- Eligibility Rule= Birthday Eligibility Rule

POINTS Tab

- Points Calc Method= Additional Points per Visit –or- Additional Points if Any Selected...
- Additional Points= X- as determined by the Organization
- Use Points Total= Point Balance Total
- Max Trans Per Week= 1
- Max Trans Start of Week= Based on organization, usually Monday or Sunday.

4. PROGRAMS- edit the Loyalty Program

- Edit Loyalty Rules- Link Birthday Loyalty Rule to the Program

Double Points for a Birthday

1. Create ELIGIBILITY RULE

- Rule Type= Use with Loyalty Rule
- Item Rule Type= Num Items in Transaction
- **Item Quantity= 0 (must be 0)**

2. 'Edit Time Rules' of the new Birthday Eligibility Rule

- Add a Time Rule
 - Type= Birthday Anniversary Rule
 - Set Period Range Type (Days, Weeks, Months)
 - Set Periods Before or After- this is the number of Days/ Weeks, etc, before and after a customer birth date where the award can be given during a POS transaction.
 - Examples- 0= only day of birthday, 1= day/week before birthday, day/week of birthday, and day/week after birthday.

3. Create LOYALTY RULE

MAIN Tab

- Type= Points Issue Rule
- Precedence= **Lowest precedence** of the Point Issue Rules for the Loyalty Program
- Eligibility Rule= Birthday Eligibility Rule

POINTS Tab

- Points Calc Method = Use Multiplier if Any Selected...
- Point Multiplier= Based on the Organization- 1 will provide double points, 2 will provide triple points, etc. Decimal places may be entered, such as .5, will allow 1.5 points to be earned.
- Use Points Total= Point Balance Total
- Max Trans Per Week= 1
- Max Trans Start of Week= Based on the Organization, usually Monday or Sunday.

4. Programs- edit the Loyalty Program

- Edit Loyalty Rules- Link Birthday Loyalty Rule to the Program

Double Dipping- Loyalty Option Bit

- When Double Dipping Option bit is enabled, an award will not be issued until the next transaction.
- This option will affect when awards, such as Stored Value are issued to an account.
- NOTE- This option is automatically enabled whenever the option Prompt for Redeem On Issue Points is enabled.

Effective Dates & Date Driven Promotions

To enable “special” rules that only apply during specific date ranges, such as Double Points during the month of February or SV Bonus during the month of December, require rules that are configured with an Effective Dates. The following configuration can be completed when linking a rule to a program, See Programs| Edit SV Bonus Rules, Edit Loyalty Rules, or Edit Redemption Rules.

1. Edit Linked Program Rules- PROGRAMS

- Select Program to Edit
- Select linked rule area, such as ‘Edit Loyalty Rule’
 - Select correct rule and click EDIT
 - Update the Effective Date Range
 - Click SAVE
- Repeat as necessary for each linked Rule

Require Registered Customer- Stored Value & Loyalty Programs

If any program, Loyalty or Stored Value, requires a registered customer there are 2 requirements to control these programs based on registration:

1. A minimum of the Customer First Name and Last Name must be registered through mycard.net or the portal, *iCare / Account Admin*.
2. 2 syncs must be scheduled to run 1-3 times a day. These syncs move customer information into the appropriate tables and allow the accounts be viewed as registered during the next POS transaction:
 - a. iCare Transactions with Location Activity
 - b. iCare New Customer with Customer Activity

Stored Value Programs

Redemption of Stored Value programs may be prevented, unless the account is registered, by enabling the ‘Require Customer on Redeem’ option bit, found under *iCare Config / Programs / Gift or Debit/ Credit...* tab.

This option bit may be enabled for Award Stored Value programs, as well as Gift/ Debit Cards, and Credit Cards.

- Verify above required syncs are configured

Loyalty Programs

Loyalty Awards may be withheld if an account is not registered by the 'Require Customer Info' option bit, found under *iCare Config / Loyalty Rules / Awards* tab.

- This option bit only applies to 2 of the 3 Award Types: *Issue Immediate Discount* and *Issue Coupon*
 - The Issue Stored Value Credit award type is not controlled by this setting- The Stored Value Credit is controlled by the 'Require Customer on Redeem' option bit, found under *iCare Config / Programs / Gift or Debit/ Credit...* tab (as noted above).
- Verify above required syncs are configured

Loyalty Award when Customer Registers

A Loyalty program may issue an award when a customer registers their account; called the New Customer Info Provided award. When creating the Loyalty Award Rule (*iCare Config / Loyalty Rules*) the following are required:

- No Eligibility Rule should be linked
- On the *Awards* tab, Use Points Total = 'New Customer Info Provided'
- By default the option 'Once Per Life Time' will be enabled- Suggest this remains enabled
- Configure appropriate award- Stored Value Credit, Immediate Discount, or Coupon
- Link Loyalty Award Rule to program
- ONLY myicard.net may be used to register the account and trigger the 'New Customer Award'
 - The portal *iCare / Account Admin* updates do not trigger the New Customer Award
- Verify above required syncs are configured

Note *If the award is Stored Value credit, once the account is registered through myicard.net and the next set of syncs referenced above have completed, then the Stored Value Award program will be created with the award amount issued.*

Stored Value Bonus- Earn Additional Value on a SV Account

Stored Value Bonus' are additional dollars given to a customer when purchasing a stored value card. For example, during the holidays when a \$100 gift card is purchased, an additional \$20 may be received. These bonus dollars may be issued on the sold gift card or on a separate gift card.

1. Create STORED VALUE BONUS RULE

- BONUS THRESHOLD and BONUS TYPE- Based on Organization's requirements
- If Stored Value Bonus should be applied to a separate card, 'Issue Bonus to Separate Card' option bit is required

The screenshot shows a software interface for creating a 'Load Bonus Rule'. The 'Issue Bonus to Separate Card' checkbox is highlighted with a yellow box. Other fields visible include 'Load Bonus Rule Name' (Holiday Card Bonus), 'Bonus Threshold' (100), 'Bonus Type' (Fixed Amount), 'Bonus Amount' (20), 'Use with Issue or Activate' (checked), 'Do Not Allow Other Bonus' (unchecked), 'Precedence' (100 (High)), 'Effective From' and 'Effective To' fields, and an 'Other Options' section.

2. Link Stored Value Bonus Rule to Program- PROGRAMS

- Select Stored Value program and click 'Edit SV Bonus Rules'
- ADD SV Bonus Rule to Program
 - Optional to change the dropdowns for ORG LEVEL or CARD RULE- Suggest leaving the value at 'Select Value'
 - ORG LEVEL or CARD RULE options are only modified if the loyalty rule is limited to these options.
- Click SAVE

3. If SV Bonus is on Separate Card..

- a. Only supported on 3700 POS- Requires SVC 4.1.0.294 or higher (Not supported on e7, 9700, or Symphony)
- b. Suggest implementing a separate Card Rule, but not required
- c. Configure a new Gift/Debit Program- REQUIRED; example "Holiday Bonus Card"
 - i. Configure new SV program similar to a sellable gift card
 - ii. REQUIRED Option Bit- 'Use with Stored value Bonus Only'
- d. Suggested to NOT enable 'Allow Reload'- prevents additional value from being added to these promo cards.

Program Administration For

Choose Action

General	Loyalty Programs	Gift or Debit/Credit/Award Programs
Allow Cash Out: <input type="checkbox"/>		Cash Out Limit: <input type="text"/>
Reserve for Auth: <input type="checkbox"/>		Allow Reload: <input type="checkbox"/>
Allow Partial Redeem: <input type="checkbox"/>		Use with Load Bonus Only: <input checked="" type="checkbox"/>
Default Credit Limit: <input type="text"/>		Credit Denial Text: <input type="text"/>
Max Redeem Amount/Day: <input type="text"/>		Max Redeem Amount/Day Part: <input type="text"/>
Max Redeem Amount/Visit: <input type="text"/>		Transaction Limit: <input type="text"/>
Dormant Charge Start: <input type="text" value="1 Month"/>		Dormant Charge: <input type="text"/>
Dormant Charge Frequency: <input type="text" value="Every Month"/>		Require Customer On Redeem: <input type="checkbox"/>
Period Carry Over Amount: <input type="text"/>		Period Reload Amount: <input type="text"/>
Adjustment Rule: <input type="text" value="Disable"/>		Balance Warning Threshold: <input type="text"/>
Adj Min Trans Value Before Discount: <input type="text"/>		Adj No Discount After Trans Value: <input type="text"/>
Adj Debit Desc: <input type="text"/>		Adj Credit Desc: <input type="text"/>
Valid Until Type: <input type="text" value="Valid for x Periods"/>		Valid Until Period Type: <input type="text" value="Months"/>
Valid Until Number Periods: <input type="text" value="2"/>		Valid Until Date: <input type="text"/>

4. POS CONFIGURATION

Update POS Request Codes, verifying/ adding the record numbers created in the POS:

- Redemption- Verify/ Add POS Key entry
 - POS KEY TYPE: Typically 'Tender'
 - Enable 'Reconcile with POS'
 - Click SAVE

See the [POS Configuration- POS Keys per Program](#) section for additional details.

Once the program is enabled, when gift card is sold/issued for an amount equal to or greater than the 'Bonus Threshold' the cashier will be prompted to swipe a bonus card to add the bonus value. A single bonus card can be loaded with more than one bonus amount. For example, \$20 is given for each \$100 gift card purchased. A customer purchases 3 \$100 gift cards. When prompted to swipe a bonus card, 3 different bonus cards may be swiped for a total of \$60 –or- a single bonus card could be swiped at each prompt for a total of \$60 added to the bonus card.

REVERSALS:

1. Servers touch void to reverse a card, as usual. SVC will send the reversal request as always, prompting the server to swipe the purchased gift card
2. iCare will void the sold gift card and reverse the issued bonus amount on the bonus card that was previously swiped.

Stored Value- Limit Redemption

Redemption of a SV card may be configured. This done if a SV program should only be redeemed for specific items, during specific times or day, or X number of days after a card is issued. This is an additional setting to the typical configuration for a Gift Card or Meal Card program.

1. Create ELIGIBILITY RULE

- RULE TYPE: 'Use with Redemption Rule'
- NAME & DESCRIPTION: Easily Understandable, similar to Program Name
- ITEM RULE TYPE: Number of items in transaction
- ITEM QUANTITY: 1
 - Item Quantity should be set to 1 so redemption allowed only if 1 or more items have been rung on the check
- Click SAVE
- **If redemption limited by Items**
 - Highlight Eligibility Rule and EDIT ITEM RULE
 - ADD items to be included or excluded during redemption
 - Click SAVE
- **If redemption limited by Time**
 - Highlight Eligibility Rule and EDIT TIME RULE
 - ADD time to be allowed (included) for redemption
 - Options for TYPE:
 - Blackout Period- Time period when an account can't be redeemed
 - Activate Blackout Period- Time period before a newly issued account can be redeemed
 - PERIOD BEFORE OR AFTER: Set number of days before new card may be redeemed- 0- Redeem 1 day after the card is issued, 1- Redeem 2 days after the card is issued
 - Available Period- Only time period when an account can be redeemed
 - Click SAVE

2. Create REDEMPTION RULE

- NAME: Easily Understandable, similar to Program Name
- TYPE:
 - If Items, inclusive or exclusive can be selected
 - If Time, only inclusive should be selected
- ELIGIBILITY RULE: Select correct Eligibility Rule
- LIMIT TO ELIGIBLE AMOUNT: Only required if redemption limited to Items
- Click SAVE

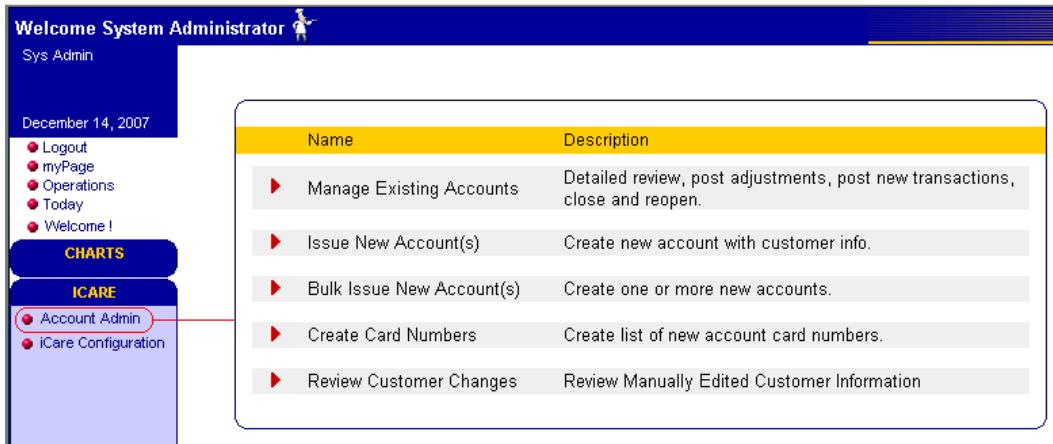
3. Link Redemption Rule to Program- PROGRAMS

- Select Stored Value program and click 'Edit Redemption Rules'
- Select correct Redemption Rule and click EDIT
- Select All Locations or one location
- Click SAVE

ADDITIONAL ICARE FUNCTIONS

iCare Account Admin Basics

General functions of the iCare Account Admin area are listed below:

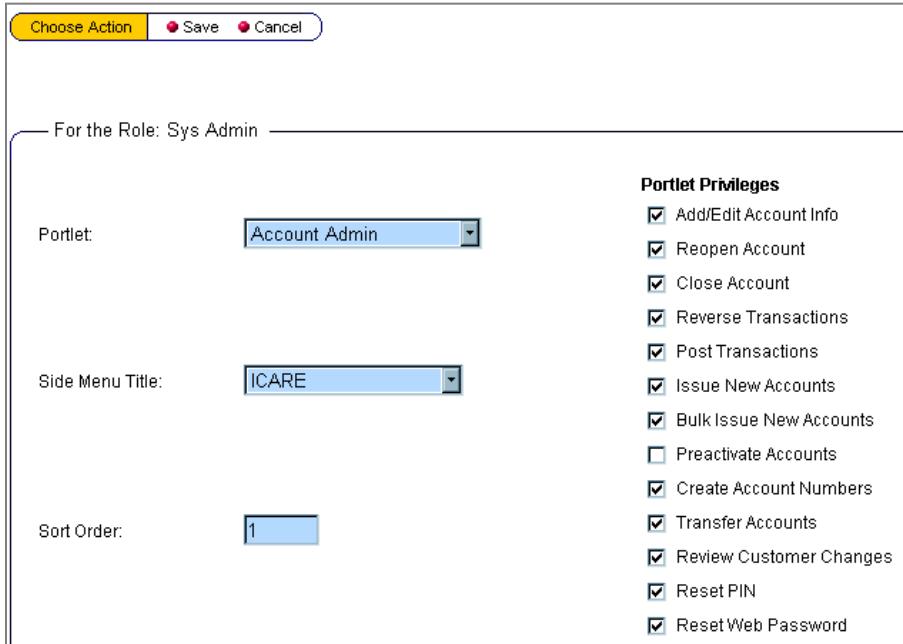


The screenshot shows the 'Welcome System Administrator' page. The sidebar on the left includes links for Logout, myPage, Operations, Today, Welcome!, CHARTS, ICARE, Account Admin (which is highlighted with a red circle), and iCare Configuration. The main content area displays a table with six rows, each representing a function:

Name	Description
Manage Existing Accounts	Detailed review, post adjustments, post new transactions, close and reopen.
Issue New Account(s)	Create new account with customer info.
Bulk Issue New Account(s)	Create one or more new accounts.
Create Card Numbers	Create list of new account card numbers.
Review Customer Changes	Review Manually Edited Customer Information

iCare Account Admin is used typically used by an organization's corporate staff, such as Guest Relations, Admin Staff, and Marketing and IT for account issue, modify, update or close iCare accounts. All functions in the iCare Account Admin area can be enabled or disabled for different managerial levels based on the role assigned to that individual user.

Below is a screenshot of the primary Account Admin options that can be enabled or disabled for each role:



The screenshot shows the configuration for the 'Sys Admin' role. The 'Portlet' dropdown is set to 'Account Admin'. The 'Side Menu Title' dropdown is set to 'ICARE'. The 'Sort Order' input field contains the value '1'. On the right, a list of 'Portlet Privileges' is shown with checkboxes:

- Add/Edit Account Info
- Reopen Account
- Close Account
- Reverse Transactions
- Post Transactions
- Issue New Accounts
- Bulk Issue New Accounts
- Preactivate Accounts
- Create Account Numbers
- Transfer Accounts
- Review Customer Changes
- Reset PIN
- Reset Web Password

iCare Customer Attributes

Organizations that use iCare, regardless of the implemented iCare programs, may attach customer information (customer attributes) to the corresponding account. This functionality does not require mymicros.net, as the customer attributes tables are a part of the core iCare transaction database.

There are 18 standard customer attributes that can be populated, for example:

The screenshot shows a form for entering customer attributes. The fields are arranged in two columns. The left column includes First Name, Last Name, Home Phone, Work Phone, Mobile Phone, Email Address, Birth Date, and PIN. The right column includes Address Line 1, Address Line 2, City, State/Province, County/Region, ZIP/Postal Code, and Country. Each field has a corresponding input box with a color-coded background: First Name (blue), Last Name (blue), Home Phone (yellow), Work Phone (yellow), Mobile Phone (yellow), Email Address (yellow), Birth Date (white), PIN (white), Address Line 1 (white), Address Line 2 (white), City (white), State/Province (white), County/Region (yellow), ZIP/Postal Code (yellow), and Country (white).

The PIN number is not a required field, but is available for added security when account holders review up their account on the myiCard.net website.

The above fields, as well as custom fields, may be set as required or optional. iCare allows custom Customer Information to be collected, but this requires the purchase of mymicros.net with iCare, as well as the customer creating custom Customer Attributes they want to track. These custom fields may be set as required or optional, but custom attributes are available in myicard.net, only in Account Admin and the iCare Web Service.

The layout of how the standard fields and custom fields can be modified by display row and column. There are 3 columns and 15 rows (the above screen shot is displaying all field in column 1 and 2, rows 1-8). These fields may also be removed by setting the row/ column field blank. This configuration is available in *ICARE/ iCare Configuration/ Customer Attributes, Signup Sources*.

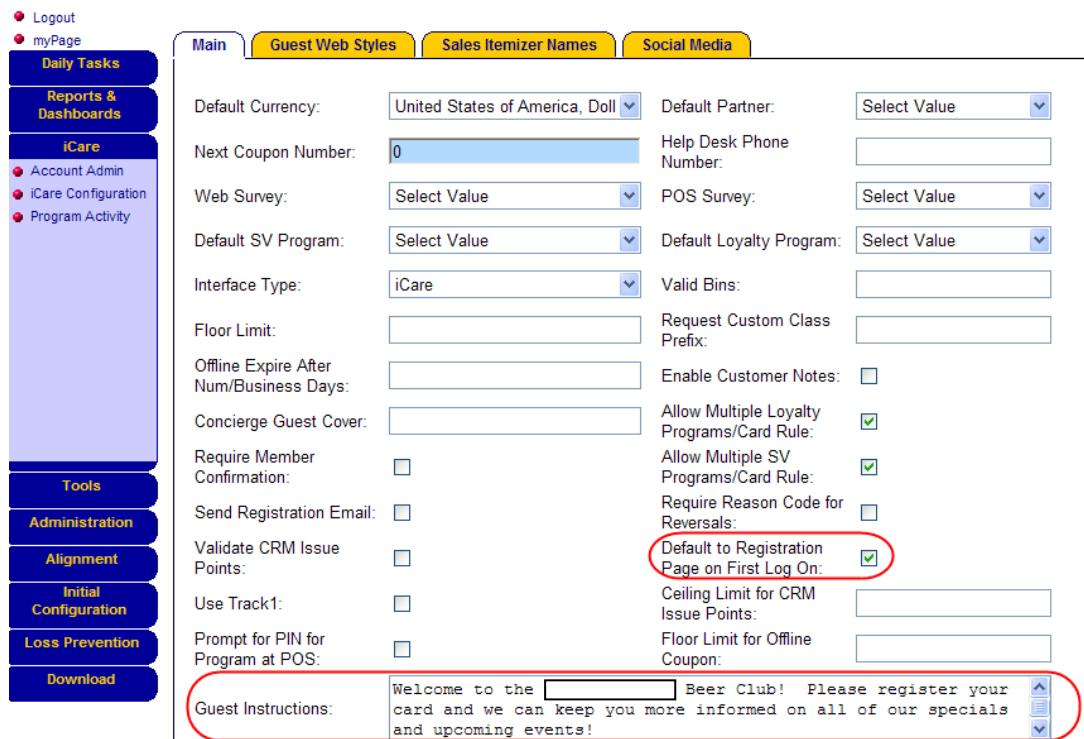
The screenshot shows the 'Customer Attributes, Signup Sources' section of the iCare Configuration interface. The left sidebar shows 'Daily Tasks' with 'Logout' and 'myPage' selected. The main content area has a table with 'Name' and 'Description' columns. The table rows are:

Name	Description
► Programs, Cards, Coupons and Rules	
► Customer Attributes, Signup Sources	
► Customer Attributes	Modify user-defined customer attributes.
► Customer Fields Display	Modify customer fields display. (This row is circled in red)
► Signup Sources	Modify customer signup source data.
► Initial iCare GPL Setup and Configuration	
► Standalone Terminal Configuration	

Note *The required setting does not apply to the iCare Web Service Interface that may be used in a custom website.*

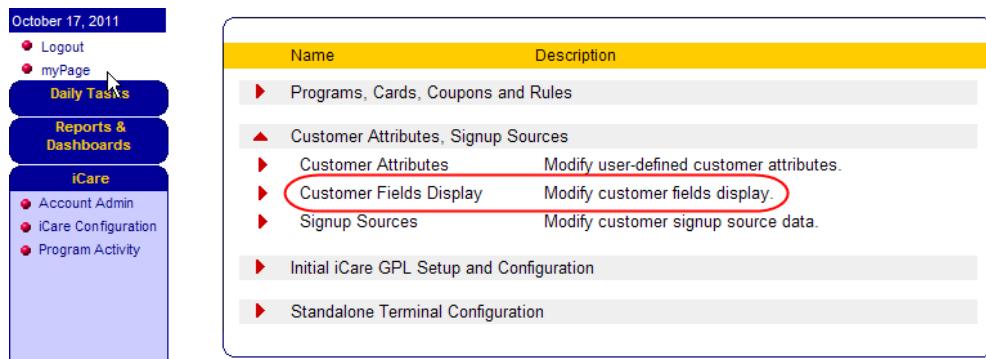
myiCard.net Configuration

myiCard.net may be tailored for an organization, changing screen flow and layout. Under *iCare Config / Initial iCare GPL Config / Organization Config* the options indicated below can make the Registration page display first with some instructions for the customer to encourage them to register their card (these instructions may be removed or edited as needed):



The screenshot shows the 'Main' tab selected in the iCare Configuration interface. The 'Guest Instructions' field is highlighted with a red box. The field contains the text: "Welcome to the [redacted] Beer Club! Please register your card and we can keep you more informed on all of our specials and upcoming events!"

The fields that display on the registration/ profile page may be updated under *iCare Config / Customer Attributes... / Customer Fields Display*. The order and fields displayed may be changed, including which fields are required:



The screenshot shows the 'Customer Fields Display' option highlighted with a red box in the 'Customer Attributes, Signup Sources' section of the configuration menu.

Logout
myPage

Account Admin **iCard** (circled)

Attribute	Position	Type
AddressLine1	Column 1:Row 2	Required
AddressLine2	Column 2:Row 2	Optional
BirthDay	Column 2:Row 8	Optional
City	Column 1:Row 3	Required
ConfirmEmailAddress	Column 1:Row 8	Optional
Country	Column 1:Row 5	Optional
County	Column 2:Row 4	Optional
EmailAddress	Column 1:Row 7	Optional
FirstName	Column 1:Row 1	Required
HomePhoneNum	Column 1:Row 6	Required
LastName	Column 2:Row 1	Required
MobilePhoneNum	Column 2:Row 7	Optional
PostalCode	Column 1:Row 4	Required
State	Column 2:Row 3	Required
WorkPhoneNum	Column 2:Row 6	Optional

Changes on the above screen will impact the following screen on myiCard.net:



[Back](#) [Logout](#)

Profile

First Name *	<input type="text"/>	Last Name *	<input type="text"/>
Address Line 1 *	<input type="text"/>	Address Line 2	<input type="text"/>
City *	<input type="text"/>	State/Region *	<input type="text"/>
Zip Code *	<input type="text"/>	County	<input type="text"/>
Country	<input type="text"/>	Work Phone	<input type="text"/>
Home Phone *	<input type="text"/>	Mobile Phone	<input type="text"/>
Email Address	<input type="text"/>	Birthday	<input type="text"/> mm/dd/yyyy
Confirm Email Address	<input type="text"/>		

Please note that all fields left blank will be cleared from your profile.
Fields marked with (*) are required.

[Submit Profile](#) [Clear](#)

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Partners- Customer Tracking for Associations & Charities

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.

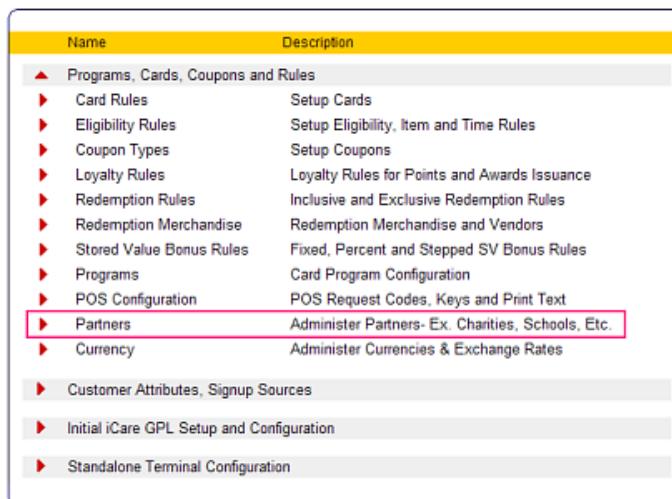
This feature applies to both stored value programs and loyalty programs and organizations are able to add or update partners as needed. Partner tracking is based on actual spend and the actual number of transactions; it is not based on loyalty point calculations, loyalty rules, or redemption rules of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



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

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

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

Please note, an account may only have one active Partner linked to their account at a time. However, if expirations are used for tracking, a second Partner may be linked to the account, provided the effectiveness 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 amount spent by customers during a 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*.