Oracle® MICROS Gift and Loyalty
User Guide

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Oracle MICROS Gift and Loyalty User Guide, Release 9.0

E91150-04

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Preface

Oracle MICROS Gift and Loyalty is an enterprise Customer Relationship Management (CRM) solution that supports account administration, gift payment and loyalty card programs, and coupon administration.

Purpose

This document is intended for customers subscribed to Oracle MICROS Gift and Loyalty Advanced Cloud Services. Customers using Standard Cloud Services and On-Premise deployments may not have access to all features described in the documentation.

The navigation instructions throughout the documentation may not accurately depict the menu layout for your Oracle MICROS Enterprise Back Office deployment because administrators can customize the name and organization of the groups and links in the sidebar menu. Use the navigation instructions provided as a guideline for locating the links in your deployment, or contact an administrator for assistance.

Audience

Oracle MICROS Enterprise Back Office documentation applies to the following users:

- Users who perform day-to-day operations with Enterprise Back Office and who typically do not have permissions to configure applications.

- Administrators who configure and maintain Enterprise Back Office. Administrators can also have permissions to configure applications.

- System Administrators or Super Administrators who maintain Enterprise Back Office servers and configuration files, implement initial application settings and configurations, and maintain back-end processes such as automated jobs and data interfaces with third-party applications.

Customer Support

To contact Oracle Customer Support, access the Support Portal at the following URL:

https://iccp.custhelp.com/

When contacting Customer Support, please provide the following:

- Product version and program/module name

- Functional and technical description of the problem (include business impact)

- Detailed step-by-step instructions to re-create

- Exact error message received

- Screen shots of each step you take

Documentation

Oracle MICROS product documentation is available on the Oracle Help Center at https://docs.oracle.com/en/industries/food-beverage/.

Revision History

Date	Description of Change
May 2018	Initial Publication
May 2018	Corrections and clarifications.
July 2019	Added information to *Managing Customer Accounts* on unlocking accounts.
September 2023	Updated guide title.

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Gift and Loyalty FAQ

This section introduces key Gift and Loyalty concepts and answers frequently asked questions.

What is Gift and Loyalty?

Oracle MICROS Gift and Loyalty is an enterprise Customer Relationship Management (CRM) solution that supports the following capabilities:

- Account Administration for issuing or pre-activating new accounts, managing existing accounts, and reviewing customer changes.

- Gift Payment and Loyalty (GPL) card program that supports loyalty and reward capabilities, such as with gift, payment, and loyalty accounts. These accounts are typically associated with a stored value card or loyalty card that the customer uses at the point of sale.

- Coupon Administration for issuing coupons to account holders.

In conjunction with third-party sales marketing and campaigning products, Gift and Loyalty provides campaigning functionality for creating, uploading, and distributing promotional materials.

What are Programs and Rules?

Gift and Loyalty programs are a set of rules that define how a group of accounts and cards function online and at the Point-of-Sale. Program types include gift cards, meal, loyalty, awards (such as through stored value loyalty cards), and credit. Each program is tracked and reported separately. The following image shows a hierarchy of rules for a program:

Figure 1-1   Program Rule Hierarchy
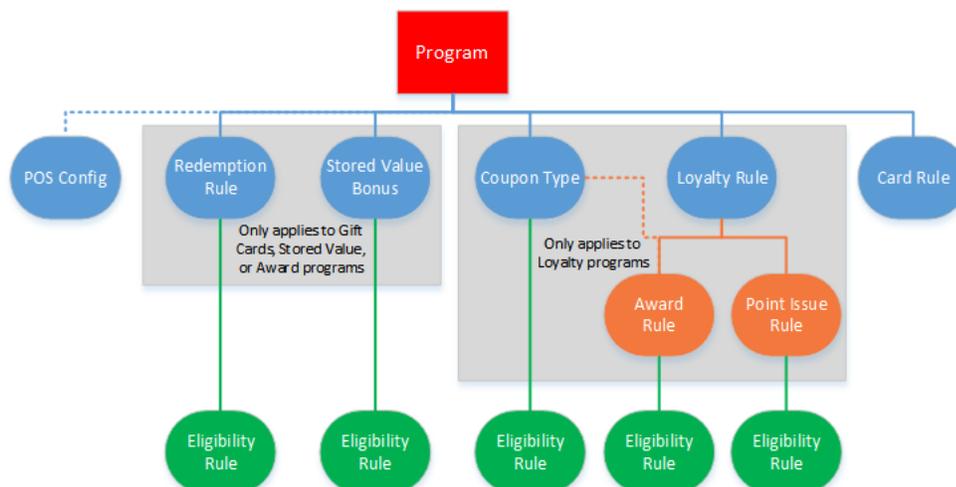
What is the Workflow for Creating a Program?

Creating a program consists of the following workflow:

1. Create a card rule.

2. Create a program and assign a card rule to the program.

3. When applicable, add eligibility rules to the program.

4. When issuing or using Gift and Loyalty coupons as a reward, add coupon types.

5. Add loyalty rules.

6. When using Gift Cards, Stored Value, or Award programs:

    a. To limit the payment days or menu items, add redemption rules.

    b. To allow additional value to be added at no charge to the purchaser, add stored value bonus rules.

7. Link the rules to the program.

8. In the Point-of-Sale application, link the tenders, service charges, discounts, or menu items to be used by Gift and Loyalty programs.

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Card Programs

Gift and Loyalty lets you create card programs using Oracle MICROS iCards or a third-party card. This section contains instructions for setting up basic or commonly-used card programs.

Setting Up Basic Gift Cards

Follow these instructions to set up a basic gift card program with stored value and options to let customers reload their gift card. These instructions do not include loyalty tracking or rewards.
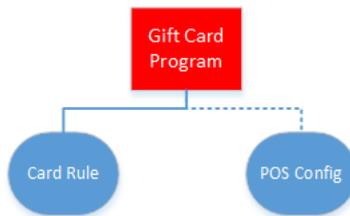
1. Set up the gift card program. Gift or Debit Program Configuration Reference contains more information about setting up the program.

    a. Create a **Gift or Debit** program.

    b. On the **Gift or Debit/Credit/Award** tab, select **Do Not Allow Issue/Reload and Redemption on Same Check**.

    c. Make sure to configure gift card behavior using the **Allow Partial Redeem**, **Allow Reload**, **Reserve for Auth**, **Allow Cash Out**, and **Cash Out limit** options.

2. Set up the card accounts for the gift card program:

    a. Create the card rules depending on whether you are using Oracle MICROS Gift and Loyalty iCards or a third-party card:

        •   Creating Card Rules for iCard

        •   Creating Card Rules for Third-Party Cards

    b. Assign one or more card rules to the program and specify the applicable locations.

    c. Create card numbers for the program and card rule, and then have the cards printed.

3. Configure the following touchscreen keys, and then add them to the Point-of-Sale screens. Configuring Point-of-Sale Touchscreen Keys contains more information about the Point-of-Sale touchscreen keys.

    •   Issue

    •   Redemption

    •   Reload (if allowed)

- Redemption Auth (if allowed)
- Cash Out (if allowed)

Setting Up Gift Cards with Additional Stored Value

Follow these instructions to set up a gift card that contains value additional to the purchase cost. For example, you can offer a gift card that costs $50 but has redeemable value of $60. In such a case, the basic gift card rules will load the card with the $50 payment, but the additional $10 must be applied to the card as a stored value bonus award.
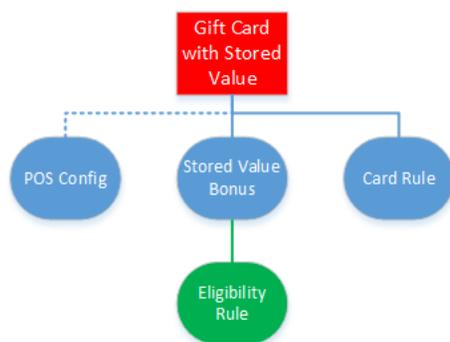
1. Set up the base card that must be purchased, such as a gift card or promotional card.

2. Set up the stored value bonus rule for the additional amount to be appended to the purchased card.

3. Set up the gift card program. Gift or Debit Program Configuration Reference contains more information about setting up the program.

   a. Create a **Gift or Debit** program.

   b. On the **Gift or Debit/Credit/Award** tab, select **Do Not Allow Issue/Reload and Redemption on Same Check**.

   c. Make sure to configure gift card behavior using the **Allow Partial Redeem**, **Allow Reload**, **Reserve for Auth**, **Allow Cash Out**, and **Cash Out limit** options.

4. Set up the card accounts for the gift card program:

   a. Create the card rules depending on whether you are using Oracle MICROS Gift and Loyalty iCards or a third-party card:

      - Creating Card Rules for iCard
      - Creating Card Rules for Third-Party Cards

   b. Assign one or more card rules to the program and specify the applicable locations.

   c. Create card numbers for the program and card rule, and then have the cards printed.

5. Set up the stored value bonus for the gift card:

a. Setting Up Stored Value Bonuses

b. Assign the stored value rule to the program and specify the applicable locations.

6. Configure the following touchscreen keys, and then add them to the Point-of-Sale screens. Configuring Point-of-Sale Touchscreen Keys contains more information about the Point-of-Sale touchscreen keys.

    •   Issue

    •   Redemption

    •   Reload (if allowed)

    •   Redemption Auth (if allowed)

    •   Cash Out (if allowed)

Setting Up Reloading Meal Cards

Follow these instructions to set up meal cards that automatically reload with a set dollar amount on a recurring basis. These cards can be allowed to accumulate value over time, and the account transaction history shows the reload and debit transaction.
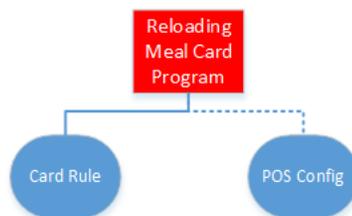
1. Set up the gift card program. Gift or Debit Program Configuration Reference contains more information about setting up the program.

    a. Create a **Gift or Debit** program.

    b. On the **Gift or Debit/Credit/Award** tab:

        •   Select **Do Not Allow Issue/Reload and Redemption on Same Check**.

        •   Enter the amount to be automatically reloaded into the meal card in **Period Reload Amount**.

        •   Enter the amount that can carry over at the end of each time period in **Period Carry over Amount**.

    c. Make sure to configure gift card behavior using the **Allow Partial Redeem** and **Reserve for Auth** options.

2. Set up the card accounts for the meal card program:

    a. Create the card rules depending on whether you are using Oracle MICROS Gift and Loyalty iCards or a third-party card:

        •   Creating Card Rules for iCard

        •   Creating Card Rules for Third-Party Cards

    b. Assign one or more card rules to the program and specify the applicable locations.

c. Create card numbers for the program and card rule, and then have the cards printed.

3. Configure the following touchscreen keys, and then add them to the Point-of-Sale screens. Configuring Point-of-Sale Touchscreen Keys contains more information about the Point-of-Sale touchscreen keys.

- Issue

- Redemption

- Redemption Auth (if allowed)

4. Configure database sync jobs for **Limit and reload debit accounts**. Scheduling Database Synchronization contains instructions for configuring sync jobs.

Setting Up Spend or Lose Programs

A spend or lose program maintains customer accounts that are reset to a given stored value amount at the end of each predefined time period. For example, you can use a spend or lose program to maintain employee meal credits, providing up to $25 a week for employees to use on lunches. Employees can then use up to the allotted $25 for lunch during the week, are given a new allotment of $25 for each week, and cannot roll over remaining credit to the next week.

When the time period rolls over:

- No transaction is posted to the Gift and Loyalty card detail when reload occurs. The balance in Gift and Loyalty shows 0.

- After the first transaction is posted, Gift and Loyalty adjusts the current balance.

- A balance inquiry from the workstation always reflects the current balance.

1. Set up the spend or lose program. Gift or Debit Program Configuration Reference contains more information about setting up the program.

    a. Create a **Gift or Debit** program.

    b. On the **Gift or Debit/Credit/Award** tab:

        - Select **Enable Spend or Lose**.

        - Enter the amount to be automatically reloaded into the card in **Spend or Lose Allowance**.

        - Enter a description to be shown for the reload transaction in **Spend or Lose Description**.

        - Select the length of the time within which the credits must be used from **Spend or Lose Schedule**.

        - For weekly spend or lose allotments, select the day of week that each week starts from **Spend or Lose Start**.

    c. Make sure to configure card behavior using the **Allow Partial Redeem** and **Reserve for Auth** options.

2. Set up the card accounts for the spend-or-lose card program:

    a. Create the card rules depending on whether you are using Oracle MICROS Gift and Loyalty iCards or a third-party card:

        - Creating Card Rules for iCard

- • Creating Card Rules for Third-Party Cards

  b. Assign one or more card rules to the program and specify the applicable locations.

  c. Create card numbers for the program and card rule, and then have the cards printed.

3. Configure the following touchscreen keys, and then add them to the Point-of-Sale screens. Configuring Point-of-Sale Touchscreen Keys contains more information about the Point-of-Sale touchscreen keys.

- • Issue
- • Redemption
- • Redemption Auth (if allowed)

Setting Up House Account Credit Cards

Follow these instructions to set up a credit card for house accounts, which can provide an organization or group with:

- • A consolidated bill for convenience with tracking and accounting for expenses.
- • A credit (expense) limit.

1. Set up the credit card program. Gift or Debit Program Configuration Reference contains more information about setting up the program.

  a. Create a **Credit Card** program.

  b. Click **Gift or Debit/Credit/Award** tab, enter the **Default Credit Limit**, and then enter the message to be shown when the limit is reached in **Credit Denial Text**. The default credit limit sets an expenditure limit before the amount is paid.

  c. Make sure to configure card behavior using the **Allow Partial Redeem** and **Require Customer on Redeem** options.

2. Set up the card accounts for the credit card program:

  a. Create the card rules depending on whether you are using Oracle MICROS Gift and Loyalty iCards or a third-party card:

- • Creating Card Rules for iCard
- • Creating Card Rules for Third-Party Cards

  b. Assign one or more card rules to the program and specify the applicable locations.

  c. Create card numbers for the program and card rule, and then have the cards printed.

3. Configure the following touchscreen keys, and then add them to the Point-of-Sale screens. Configuring Point-of-Sale Touchscreen Keys contains more information about the Point-of-Sale touchscreen keys.

- • Redemption
- • Redemption Auth (if allowed)

Setting Up Discount Cards

Follow these instructions to set up discount cards, such as membership discount cards for restaurants, or to apply employee discounts.

1. Create a card rule. Card Rule Configuration Reference contains information and instructions for setting up the set of cards.

2. Create an eligibility rule to require at least one purchase. Eligibility Rule Configuration Reference contains more information about eligibility rules.

   a. Create a **Use with Loyalty Rule** eligibility rule.

   b. Select the **Num Items in Transaction** item rule type, and then enter 1 as the **Item Quantity**.

   c. If the discount should be based on items instead of the check subtotal, click **Save**, select the eligibility rule, click **Edit Item Rules**, and then configure the list of eligible items.

3. Configure the discount. Loyalty Rule Configuration Reference contains more information about loyalty rules.

   a. Create a **Points Awards Rule** loyalty rule.

   b. Select the **Eligibility Rule** you created.

   c. On the **Awards** tab, select **Points Balance Total** from **Balance Use Type**.

   d. Enter 0 in **Point Threshold**.

   e. Select **Issue Immediate Discount** from **Award Type**.

   f. Configure the discount by selecting the **Award Discount Type**, and then entering the **Discount & Award Amount** or **Discount Percentage** based on the selected type.

   g. Enter 0 in **Point Cost**.

   h. If you want the receipt to print with a message about the discount, enter the message in **POS Print Text**.

   i. Select **Require Customer Info** to require that the customer have an account before they can begin using the discounts.

4. Set up the loyalty program. Loyalty Programs Configuration Reference contains more information about loyalty programs.

   a. Create a **Loyalty** program.

   b. On the **Loyalty Programs** tab, select **Auto Create Loyalty Accounts** to allow Gift and Loyalty to create a loyalty account for a customer being issued points for the first time. Do not select the option if you want to require customers create an account prior to the transaction.

5. Set up the card accounts for the discount card program:

   a. Create the card rules depending on whether you are using Oracle MICROS Gift and Loyalty iCards or a third-party card:

      • Creating Card Rules for iCard

      • Creating Card Rules for Third-Party Cards

   b. Assign one or more card rules to the program and specify the applicable locations.

   c. Create card numbers for the program and card rule, and then have the cards printed.

6. Configure the **Issue Points** Point-of-Sale touchscreen keys. For this program, the key requires a tender and a discount. Configuring Point-of-Sale Touchscreen Keys contains more information about the Point-of-Sale touchscreen keys.

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Loyalty Programs

This section contains instructions for setting up basic or commonly-used loyalty programs.

Setting Up Points Per Amount Spent Loyalty Programs

Follow these instructions to set up a loyalty program that accumulates a loyalty points based on the subtotal of a check.

1. Set up the loyalty program. Loyalty Programs Configuration Reference contains more information about setting up the program.

   a. Create a **Loyalty** program.

   b. On the **Loyalty Programs** tab, select **Auto Create Loyalty Accounts** to allow Gift and Loyalty to create a loyalty account for a customer being issued points for the first time. Do not select the option if you want to require customers create an account prior to the transaction.

2. Set up the card accounts for the loyalty program:

   a. Create the card rules depending on whether you are using Oracle MICROS Gift and Loyalty iCards or a third-party card:

      • Creating Card Rules for iCard

      • Creating Card Rules for Third-Party Cards

   b. Assign one or more card rules to the program and specify the applicable locations.

   c. Create card numbers for the program and card rule, and then have the cards printed.

3. Create an eligibility rule to require at least one purchase. You can also require the transaction to include purchases of specific items to be eligible for points. Eligibility Rule Configuration Reference contains more information about eligibility rules.

   a. Create a **Use with Loyalty Rule** eligibility rule.

   b. Select the **Num Items in Transaction** item rule type, and then enter `1` as the **Item Quantity**.

   c. To require that the transaction include specific sales itemizers, click the **Sales Itemizers** tab, and then select the required itemizers.

   d. To require that the transaction include specific items, click **Save**, select the eligibility rule, click **Edit Item Rules**, and then configure the list of eligible items.

4. Create and assign a loyalty rule to the program. Loyalty Rule Configuration Reference contains more information about loyalty rules.

   a. Create a **Points Issue Rule** loyalty rule, and then select the **Eligibility Rule** you created.

   b. Click the **Points** tab.

   c. In the **Point Calc Method Type** drop-down list:

      • To issue points for each dollar spent, select **Per check value**, and then enter the number of points per dollar in **Point Factor**.

- To issue points for each dollar spent on selected items, select **Value of selected items**, and then enter the number of points per dollar in **Point Factor**.

- To issue points for each dollar spent in the entire transaction if one or more selected items is purchased, select **Per check value if any selected**, and then enter the number of points per dollar in **Point Factor**.

- To issue a point by incremental amount on the check, select **Per defined check value**, and then enter the dollars per point in **Per Defined Value**.

5. Configure the **Point Issue** touchscreen key, and then add it to the Point-of-Sale screens. Configuring Point-of-Sale Touchscreen Keys contains more information about the Point-of-Sale touchscreen keys.

6. If the loyalty program is for specific items, configure the following database sync jobs. Scheduling Database Synchronization contains instructions for configuring sync jobs.

   - Sync Menu Items

   - Sync Menu Item Masters

   - Sync Family Groups

   - Sync Family Group Masters

   - Sync Major Groups

   - Sync Major Group Masters

Setting Up Points Per Visit Loyalty Programs

Follow these instructions to set up a loyalty program that accumulates a loyalty points based on visits or transactions.

1. Set up the loyalty program. Loyalty Programs Configuration Reference contains more information about setting up the program.

   a. Create a **Loyalty** program.

   b. On the **Loyalty Programs** tab, select **Auto Create Loyalty Accounts** to allow Gift and Loyalty to create a loyalty account for a customer being issued points for the first time. Do not select the option if you want to require customers to create an account prior to the transaction.

2. Set up the card accounts for the loyalty program:

   a. Create the card rules depending on whether you are using Oracle MICROS Gift and Loyalty iCards or a third-party card:

      - Creating Card Rules for iCard

      - Creating Card Rules for Third-Party Cards

   b. Assign one or more card rules to the program and specify the applicable locations.

   c. Create card numbers for the program and card rule, and then have the cards printed.

3. Create an eligibility rule to require at least one purchase. You can also require the transaction to include purchases of specific items to be eligible for points. Eligibility Rule Configuration Reference contains more information about eligibility rules.

    a.   Create a **Use with Loyalty Rule** eligibility rule.

    b.   Select the **Num Items in Transaction** item rule type, and then enter `1` as the **Item Quantity**.

    c.   To set a minimum requirement for the transaction to count as a visit, enter a **Check Min Value**. For example, enter `1` to require a transaction to be worth at least a dollar, and to prevent customers from accruing points by purchasing a $0.75 candy bar.

4.   Create and assign a loyalty rule to the program. Loyalty Rule Configuration Reference contains more information about loyalty rules.

    a.   Create a **Points Issue Rule** loyalty rule, and then select the **Eligibility Rule** you created.

    b.   Click the **Points** tab.

    c.   In the **Point Calc Method Type** drop-down list, select **Per visit**, and then enter the number of points per visit in **Point Factor**.

5.   Configure the **Point Issue** touchscreen key, and then add it to the Point-of-Sale screens. Configuring Point-of-Sale Touchscreen Keys contains more information about the Point-of-Sale touchscreen keys.

Setting Up Round Robin (Unique Purchases) Loyalty Programs

A round robin loyalty program awards customers with loyalty points for purchasing items for the first time, or for the first time within a limited timeframe.

For example, a bar might have a menu with 100 types of craft beers, and offers a challenge for customers to drink every beer on the menu. The bar can set up a round robin loyalty program that awards a point whenever a customer purchases a beer for the first time. The loyalty program can then be set up with the following tiered loyalty awards:

- 10 points: free entrée.
- 25 points: $10 gift card.
- 50 points: $20 gift card, free meal of up to $25.
- 75 points: $30 gift card.
- 100 points: $50 gift card, placard with name and date of achievement on store wall.

This program requires Oracle MICROS Simphony or Oracle MICROS RES 3700 with SVC 4.1.0.326 or later.

1.   Create an eligibility rule for the round robin loyalty items. Eligibility Rule Configuration Reference contains more information about eligibility rules.

    a.   Create a **Use with Loyalty Rule** eligibility rule.

    b.   Select the **Num Items in Transaction** item rule type, and then enter `1` as the **Item Quantity**.

    c.   Select **Item must be unique**.

    d.   In the **Unique Item Expiration Method** drop-down list, select whether customers can earn points for purchasing an item again. For example, you can configure the program to reset points after two years, or you can configure the program to accept purchases again after one year. You can define the time interval using **Period Type** and **Number of Periods**

- • **Never Expire**: the program does not allow items to count for another point for the lifetime of the account.

- • **Expire items after x periods**: the program allows an item purchase to earn a point after a defined amount of time has elapsed since its purchase date.

- • **Expire items after x rolling periods**: the program allows an item purchase to earn a point after a defined number of time periods has elapsed since the period in which the item was purchased.

- • **Reset all items after x periods**: the program allows all item purchases to earn a point after a defined amount of time has elapsed since the first item was purchased.

- • **Reset all items after x rolling periods**: the program allows all item purchases to earn a point after a defined amount of time periods has elapsed since the period in which the first item was purchased.

  e. Enter the maximum number of unique items in **Max Saved Unique Items per Account**. If this configuration is not set or is set to a significantly greater value than necessary, workstations can experience performance degradation when processing transactions.

  f. Click **Save**, select the eligibility rule, click **Edit Item Rules**, and then configure the list of items that count toward this program.

    The round robin program uses Reporting and Analytics End-of-Day posting, item alignment, and Gift and Loyalty sync jobs to align and update items. It can take up to a full calendar day for Gift and Loyalty to show new menu items.

  g. Click **Edit Time Rules** to configure a time restriction on the program. For example, you can configure the program to run for two years, or you can omit Happy Hour times.

2. Create a loyalty rule for the program. Loyalty Rule Configuration Reference contains more information about loyalty rules.

  a. Create a **Points Issue Rule** loyalty rule, and then select the **Eligibility Rule** you created.

  b. Click the **Points** tab.

  c. Select **Number of unique selected items** from the **Point Calc Method Type** drop-down list, and then enter the number of points to award for each item in **Point Factor**.

3. Configure a loyalty award rule. You can use tiered loyalty awards.

4. Set up the loyalty program. Loyalty Programs Configuration Reference contains more information about setting up the program.

  a. Create a **Loyalty** program.

  b. On the **Loyalty Programs** tab, select **Auto Create Loyalty Accounts** to allow Gift and Loyalty to create a loyalty account for a customer being issued points for the first time. Do not select the option if you want to require customers create an account prior to the transaction.

  c. Select the **Default Award Program** from the drop-down list.

5. Set up the card accounts for the loyalty program:

       a. Create the card rules depending on whether you are using Oracle MICROS Gift and Loyalty iCards or a third-party card:

- Creating Card Rules for iCard

- Creating Card Rules for Third-Party Cards

       b. Assign one or more card rules to the program and specify the applicable locations.

       c. Create card numbers for the program and card rule, and then have the cards printed.

6. Configure the **Point Issue** and **Unique Item Inquiry** touchscreen keys, and then add them to the Point-of-Sale screens. Configuring Point-of-Sale Touchscreen Keys contains more information about the Point-of-Sale touchscreen keys.

7. If the loyalty program is for specific items, configure the following database sync jobs. Scheduling Database Synchronization contains instructions for configuring sync jobs.

- Sync Menu Items

- Sync Menu Item Masters

- Sync Family Groups

- Sync Family Group Masters

- Sync Major Groups

- Sync Major Group Masters

- Unique Items Sync

4

Loyalty Awards and Award Programs

This section contains instructions for setting up basic or commonly-used loyalty awards and award programs.

Setting Up Tiered Loyalty Awards

Follow these instructions to set up a loyalty awards program that allows customers to earn awards at multiple point thresholds without resetting their accrued point total. For example, you can set up a program that awards a $5 discount at 50 points, a $10 discount at 100 points and a free entrée at 200 points. You can configure the awards program to reset the points total after reaching a certain threshold.

1. Follow these instructions to create a loyalty point award, starting with the lowest tier:

   a. Create a **Points Awards Rule** loyalty rule.

   b. Select the **Eligibility Rule** to apply an eligibility rule.

   c. Select **Print Points Until Awards** to print the amount of points a customer must accrue to reach this award on the receipt.

   d. Select a **Precedence**. For example, select **95**. When configuring a subsequent tier, make sure the selected precedence is lower. For example, select **94** for the next tier, **93** after that, and so on.

   e. On the **Awards** tab, select **Points Balance Total** from **Balance Use Type**.

   f. Enter the number of points required for this award in **Point Threshold**. For example, enter `50`.

   g. Configure the award. Do not enter a **Point Cost**.

   h. Select **Cross Point Threshold** to indicate that this award belongs to a tiered award program.

2. To configure a threshold at which the customer points total resets:

   a. Create a **Points Awards Rule** loyalty rule.

   b. Do not select an **Eligibility Rule**.

   c. Do not select **Print Points Until Awards**.

   d. Select a **Precedence**. Set this award rule as the lowest precedence for this program.

   e. On the **Awards** tab, select **Points Balance Total** from **Balance Use Type**.

   f. Enter the number of points at which the point total resets in **Point Threshold**. This should typically be the same number as the highest award tier.

   g. Enter the same number of points in **Point Cost**. This value is deducted from the customer point balance.

3. Assign the loyalty rule to a program.

Setting Up Birthday Discounts

Follow the instructions to set up a discount when a customer visits at or around their birthday.

1. Create an eligibility rule to require at least one purchase, and then assign a birthday time rule.

    a. Create a **Use with Loyalty Rule** eligibility rule.

    b. Select the **Num Items in Transaction** item rule type, and then enter 1 as the **Item Quantity**.

    c. Click **Save**, select the eligibility rule, click **Edit Time Rules**, and then click **Add**.

    d. Select **Birthday Anniversary Rule** from **Type**.

    e. To configure the amount of time before and after the birthday that the discount is available, select the **Period Range Type** and enter the duration in **Periods Before or After**.

2. Configure the discount:

    a. Create a **Points Awards Rule** loyalty rule.

    b. Select a **Precedence** and make sure this discount has the highest precedence of all point award rules.

    c. Select the **Eligibility Rule** you created.

    d. On the **Awards** tab, select **Points Balance Total** from **Balance Use Type**.

    e. Enter 0 in **Point Threshold**.

    f. Select **Issue Immediate Discount** from **Award Type**.

    g. Configure the discount by selecting the **Award Discount Type**, and then entering the **Discount & Award Amount** or **Discount Percentage** based on the selected type.

    h. Enter 0 in **Point Cost**.

    i. If you want the receipt to print with a message about the discount, enter the message in **POS Print Text**.

    j. Select **Require Customer Info** to require that the customer have an account before they can begin using the discounts.

    k. Select **Once Per Year**.

Setting Up a Registration Bonus

Follow the instructions to set up a bonus or gift when a customer registers for the program. This award requires the overnight sync jobs to work for Gift and Loyalty before the bonus is issued.

1. Create a **Points Awards Rule** loyalty rule.

2. On the **Awards** tab, select **New Customer Info Provided** from **Balance Use Type**.

3. Configure the award by selecting the **Award Type**, selecting the **Award Discount Type** for discounts, and then entering the **Discount & Award Amount** or **Discount Percentage** based on the award selections.

4. Select **Once Per Life Time**.

Setting Up Bonus Cards for Gift Card Purchases

Follow these instructions to give the customer a bonus card after purchasing gift cards totaling a given amount. For example, a location can offer the deal "buy 100$ in gift cards and we'll give you a $20 gift card."

Create the bonus card rule:

1. In Reporting and Analytics, click the link to go to the **Stored Value Bonus Rules** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Enter an identifying **Name** for the bonus card rule, and optionally enter a **Description** for comments or notes regarding the rule.

3. Enter the minimum gift card amount that a customer must purchase to qualify for the bonus card in **Bonus Threshold**.

4. Configure the bonus type and amount:

   a. To configure a percentage-based bonus, select **Percentage** from the **Bonus Type** drop-down list, and then enter the percentage of the loaded amount to award in **Bonus Percentage**.

   b. To configure a fixed value bonus, select **Fixed Amount** from the **Bonus Type** drop-down list, and then enter the amount in **Bonus Amount**.

   c. To configure an incremental bonus, select **Stepped Amount** from the **Bonus Type** drop-down list, enter the amount awarded at the threshold and at each increment in **Bonus Amount**, and then enter each increment after the threshold in **Bonus Step Amount**. For example, you can configure the threshold as $100, the step amount as 30$, and the bonus amount as $5. When a customer purchases $150 worth of gift cards, this program awards $5 for the passing the $100 threshold and another 5$ for passing the first increment at $130, for a total of $10 bonus.

5. To implement "not valid with any other offer," select **Do Not Allow Other Bonus**.

6. Select **Issue Bonus to Separate Card**.

7. Select the priority for the rule in **Precedence**. If more than one stored value bonus rule would apply to a transaction, Gift and Loyalty uses the rule with the highest precedence value.

8. Select an **Eligibility Rule** that has been configured with the **Use with Stored Value Bonus Rule** type. You do not need to select an eligibility rule.

9. To configure a limited duration for this offer, select a start and end date in the **Effective From** and **Effective To** fields.

10. Click **Save**.

Assign the bonus card rule to the program:

11. From the Reporting and Analytics side menu, click the link to go to the **Programs** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, select the program you

want to configure, and then click **Edit SV Bonus Rules**. If you cannot find the link, contact your system administrator.

12. Select the bonus card rule, and then click **Edit**.

13. Select **No Locations**, **All Locations**, or the specific locations for which the stored value bonus rule and program apply.

14. Click **Save**.

5

Customer Account Administration

Corporate staff, such as guest relations, administration, or marketing, can use the Account Administration portlet to issue, modify, or close customer accounts. System administrators can configure access to the account administration functionality by role.

Account Administration Permissions

The Gift and Loyalty account administration portlet contains the following permissions. The *Enterprise Back Office Reporting and Analytics User Guide* contains more information about portlet permissions and user roles.

To let employees do the following	Enable this permission
Add or modify customer data associated with an account.	Add/Edit Account Info
Reopen a closed customer account.	Reopen Account
Close an active customer account.	Close Account
Reverse transactions through Gift and Loyalty account administration.	Reverse Transactions
Post transactions and balance adjustments through Gift and Loyalty account administration.	Post Transactions
Issue fully-functional and active accounts to customers.	Issue New Accounts
Create a batch of fully-functional and active but unassigned accounts.	Bulk Issue New Accounts
Issue inactive accounts to customers.	Pre-activate Accounts
Create one or more card numbers for printing and for customer accounts.	Create Account Numbers
Transfer a customer account data to a new card number.	Transfer Accounts
Review changes made by a customer in myicard.net.	Review Customer Changes
Reset the PIN for customer accounts.	Reset Pin
Issue a request for a card replacement for a customer.	Replace Cards
Flag an account.	Set Red Flag
Use custom transactions.	Allow Custom Transactions *x*
Create or set an account as being for testing purposes.	Set Test Account
Reset the email undeliverable flag.	Reset Email Delivery Flag
Change the program level of a customer account.	Change Account Tier

Card and Account Numbers

After creating a card program and card rule, generate and reserve card numbers to be printed for a specific program and rule. Gift and Loyalty uses card numbers as the account numbers.

This process does not forego the need to issue the cards before they are active, and you must avoid duplicate card numbers. Review existing numbers to make sure you are entering an unused range of card numbers.

Reviewing Existing Card Numbers

1. In Reporting and Analytics, click **View Created Card Numbers** in the **iCare Account Administration** portlet. If you cannot find the link, contact your system administrator.

2. Use the columns to find the set of numbers, and then click **View**.

3. Scroll to the end of the list of numbers and make note of the last card number. You must enter a higher number when creating your next batch of cards.

Creating Card Numbers

1. In Reporting and Analytics, click **Create Card Numbers** in the **iCare Account Administration** portlet. If you cannot find the link, contact your system administrator.

2. Select the **Program**.

3. If the program uses more than one type of card, select the **Card Rule** for this set of numbers.

4. If the field is not automatically populated, enter the first number to assign, enter the number of increments to create in **Number of Accounts**, and then click **Create**.

5. You can now print cards with these numbers, and then issue customer accounts using these numbers.

Issuing an Fully-Functional and Active Account to a Customer

Follow these instructions to issue a fully functional and active card and account to a customer.

1. In Reporting and Analytics, click **Issue New Account(s)** in the **iCare Account Administration** portlet. If you cannot find the link, contact your system administrator.

2. Select the program and card type for the account. If only one card rule is assigned to the program, Gift and Loyalty auto-populates this field.

3. For gift cards, enter the monetary value to be issued in **Denomination**. The amount entered in this field is immediately available to the customer for redemption after issuing the account without further interaction at a workstation.

4. Enter the number on the card being issued in **Account Number**. Gift and Loyalty validates this entry against the record of created card numbers.

5. Select the location or organization level from **Location**. This setting affects the region-based rules and configurations that apply to the customer account and card.

6. Enter an identifying **Description**, and then click **Next**.

7. Fill out the customer information form as necessary, and then click **Issue**.

Creating a Batch of Empty Accounts

In some cases, such as when you want to create a batch of reusable gift cards that are pre-loaded with 50$ but do not require customer registration, you can create a batch of accounts and cards that are fully functional and active.

1. In Reporting and Analytics, click **Bulk Issue New Account(s)** in the **iCare Account Administration** portlet. If you cannot find the link, contact your system administrator.

2. Select the program and card type for the accounts. If only one card rule is assigned to the program, Gift and Loyalty auto-populates this field.

3. For gift cards, enter the dollar amount to be issued in **Denomination**. The amount entered in this field is immediately available to the customer for redemption after issuing the account without further interaction at a workstation.

4. Enter the first card number for the batch in **First Account Number**, and then enter the **Number of Accounts** to be created. Make sure you created enough card numbers to support the whole batch of accounts.

5. Select the location or organization level from **Location**. This setting affects the region-based rules and configurations that apply to the customer accounts and cards.

6. Enter an identifying **Description**, and then click **Issue**.

Creating Inactive Accounts for One or More Customers

Follow these instructions to issue an inactive card and account to a customer. These cards can be loaded with a dollar amount, but cannot be redeemed by the customer until they register and pay at a workstation.

> **Note:**
>
> Oracle MICROS recommends that system administrators remove this configuration from the **iCare Account Administration** portlet if the functionality is not needed by the organization or location.

1. In Reporting and Analytics, click **Pre-Activate New Accounts** in the **iCare Account Administration** portlet. If you cannot find the link, contact your system administrator.

2. Select the program and card type for the account. If only one card rule is assigned to the program, Gift and Loyalty auto-populates this field.

3. For gift cards, enter the dollar amount to be issued in **Denomination**. The amount entered in this field is immediately available to the customer for redemption after issuing the account without further interaction at a workstation.

4. Enter the number on the card being issued in **First Account Number**.

   If you are creating a batch of inactive accounts, enter the **Number of Accounts** to be created. Gift and Loyalty validates this entry against the record of created card numbers. Make sure you created enough card numbers to support the whole batch of accounts.

5. Select the location or organization level from **Location**. This setting affects the region-based rules and configurations that apply to the customer account and card.

6. Enter an identifying **Description**, and then click **Issue**.

Managing Customer Accounts

You can manage customer accounts using the following tasks:

If you want to...	Then do the following...
Navigate to the customer's information hub.	1. In Reporting and Analytics, click **Manage Existing Accounts** in the **iCare Account Administration** portlet. If you cannot find the link, contact your system administrator. 2. Enter the account number of the customer you want to view or modify, and then click **Manage**. If you do not know the account number, click **Find Account Number**, use the search filters to find the customer, and then click **Manage**.
Make changes to the customer profile.	1. In the customer's information hub, click **Edit Account Information**. 2. Make changes to the customer profile, and then click **Save**.
Make changes to the customer's social media information.	You cannot add customer social media information without receiving explicit permission. 1. In the customer's information hub, click **Edit SM Accounts**. 2. Make changes to the customer's social media account links, and click **Save**.
Add or view manager notes about the customer.	1. In the customer's information hub, click **View Customer Notes**. 2. To add notes, click **Add**, select a preconfigured category for the note, and enter the note, and then click **Save**.
Transfer an account.	Account transfers let customers maintain their data across different cards, such as when they lose their card or replace it for any reason. 1. In the customer's information hub, click the account number. 2. Enter the new account (card) number, enter a reason in the **Description**, and then click **Transfer Account**.
Issue a request to replace the customer's card.	1. In the customer's information hub, click **Replace Card**. 2. Verify that a request for a replacement is not already pending, and then click **Replace Card**. 3. After receiving the new card, the customer should have their account transferred to the new card number.

If you want to...	Then do the following...
Change the customer's loyalty program level.	1. In the customer's information hub, click the program level name in the **Program Level** column. 2. Select the new program level, select the location, and then click **Change Program Level**.
Close or reopen the customer's account.	1. In the customer's information hub, click the status in the **Status** column. 2. Select the location, enter a description for the status change, and then click the button. Gift and Loyalty automatically changes this button depending on the current status of the account.
Review changes to the customer profile by the customer in myicard.net.	1. In Reporting and Analytics, click **Review Customer Changes** in the **iCare Account Administration** portlet. If you cannot find the link, contact your system administrator. 2. Select the customer that made changes, and then click **Review**. 3. Review the changes, and then click **Approve** or **Discard**.
Unlock account.	1. In Reporting and Analytics, find the customer's account. 2. In the customer's information hub, click **Unlock Account**.

Managing Customer Transactions

You can manage customer transaction and balance using the following tasks:

If you want to...	Then do the following...
View the customer's remaining balance for a program.	1. In the customer's information hub, click the program name.
View the list of transactions by the customer for a program, and drill down to view transaction details.	1. In the customer's information hub, click the number in the **Balance** column. This shows a list of transactions by the customer for the program. 2. To view transaction details, click the **Description** of the transaction.

If you want to...	Then do the following...
Reverse a transaction.	1. In the customer's information hub, click the number in the **Balance** column. This shows a list of transactions by the customer for the program.
	2. Select the transaction that you want to reverse, and then click **Reverse Transaction**. Make sure not to click the **Description** of the transaction, because the link drills down into the transaction details and does not let you reverse the transaction.
	3. Select the reason for reversing the transaction, enter a description for the operation, enter the employee responsible for reversing the transaction, and then click **Reverse Transaction**.
Post an transaction or adjustment to the customer's account.	You can use this operation to post credits or debits to customer accounts, or to post corrections.
	1. In the customer's information hub, click the number in the **Balance** column. This shows a list of transactions by the customer for the program.
	2. Click **Post Transaction**.
	3. Select the location and business date to attribute to the transaction or adjustment.
	4. Select whether to post credit or debit in **Transaction Type**, and then select the **Transaction Category** to which the adjustments are reported on the program activity report.
	5. Enter the transaction or adjustment amount in currency or points, and then enter a description.
	6. You can specify the revenue center, check, or employee for the transaction or adjustment.
	7. If the transaction or adjustment qualifies for a coupon award, select **Issue Coupon**.
	8. Click **Post Transaction**.

Managing the Customer Registration Form

Customers can enter and configure their personal data:

- by logging into myicard.net.

- through an employee accessing the Gift and Loyalty portlet.

- a third-party web application using the Gift and Loyalty API.

Perform the following to configure custom fields for personal data and to configure the look and feel of the portal or myicard.net forms.

1. To configure fields to the customer registration form in the Gift and Loyalty portlet or API, in Reporting and Analytics, click **Customer Attributes** in the **iCare Gift, Payment, and Loyalty Configuration** portlet. If you cannot find the link, contact your system administrator.

2. To add or modify custom fields:

    a. Click **Add**, or select an existing field and click **Edit**.

    b. Fill out the form to configure the field. In the **Data Type** field, select:

- **Date**: formatted date.
- **Decimal**: numeric entry with a decimal place.
- **Enumeration**: a configurable list of enumerated values.
- **Numeric**: numeric entry without a decimal place.
- **Text**: text field that accepts any character type.
- **True/False**: checkbox.

    c. Click **Save**.

3. To configure the list of values of an **Enumeration** field:

    a. Select the enumerated value field, and then click **Edit Enumerated Values**.

    b. Click **Add**, or select an existing enumerated value and click **Edit**.

    c. Enter the value, and then click **Save**.

4. To configure the visibility and layout of the registration form:

    a. In Reporting and Analytics, click **Customer Fields Display** in the **iCare Gift, Payment, and Loyalty Configuration** portlet. If you cannot find the link, contact your system administrator.

    b. For each field, select the column and row for the field in **Position**, and select whether the field is optional or required in **Type**.

       To hide a field, select the blank line in the **Position** drop-down list.

       You cannot select the same column and row more than once.

    c. Click **Save**.

6
Gift and Loyalty GPL Setup and Configuration

This chapter contains instructions and information for setting up Gift and Loyalty for the organization.

Organization-wide Gift and Loyalty Configurations

1. In Reporting and Analytics, click **Initial iCare GPL Setup and Configuration** in the **iCare Account Administration** portlet, and then click **Organization Configuration**. If you cannot find the link, contact your system administrator.

2. Set the following basic Gift and Loyalty configurations:

   a. Select the **Default Currency** and the **Default Partner** for the organization.

   b. To define default programs, select a **Default SV Program** for stored value bonuses, or select a **Default Loyalty Program** for loyalty point programs.

3. Enter 1 in **Next Coupon Number**, and then leave the **Web Survey** and **POS Survey** drop-down lists at the default selection.

4. Leave **Interface Type** at the default **iCare** selection, and then leave **Valid Bins** and **Request Custom Class Prefix** empty.

5. Configure Gift and Loyalty behavior when the system network goes offline or in offline redemption mode:

   a. Enter the maximum amount that can be charged to a stored-value account in **Floor Limit**.

   b. Enter the number of days that Operations stores offline transactions before expiring in **Offline Expire After Num/Business Days**.

   c. Enter the maximum amount that can be redeemed for a coupon in **Floor Limit for Offline Coupon**. For example, if a customer uses a 20% discount coupon for a 20$ transaction while the system network is offline but this field is set to 2, Gift and Loyalty only allows the coupon to be redeemed for 2$.

6. For locations enrolled in a Concierge program and using custom transactions, enter the number of points to assign per guest in **Concierge Guest Cover**. For example, if you enter 5 and a group of four sits at a table, this configuration awards the reserving member of the group with 20 points.

7. To enable entering and viewing notes about customers, select **Enable Customer Notes**.

8. To enable configuring more than one program on a card rule, select **Allow Multiple Loyalty Programs/Card Rule** or **Allow Multiple SV Programs/Card Rule**.

9. To require customers to register their account before awarding any points, select **Require Member Confirmation**.

10. De-select **Send Registration Email**.

11. To require a reason code selection when an employee reverses a customer transaction, select **Require Reason Code for Reversals**. If you select this option, you must configure reason codes.

12. Configure validation requests from a third-party interface:

    a. To allow the system to accept validation requests for loyalty points from a third-party interface, select **Validate CRM Issue Points**. For example, if a customer forgets their loyalty card, a transaction can be retrieved from the database and points posted to an iCare account. This requires iCare customers to log in to a third party generic interface, submit their account number, the business date of the transaction, the amount, and the check number. The system will check to ensure the transaction is valid and then credit the account with the correct number of points.

    b. To configure a minimum amount of points to be issued by a transaction before Gift and Loyalty must validate the transaction in **Ceiling Limit for CRM Issue Points**. For example, if you enter 5, and a transaction issued by a third-party interface would issue 4 points, Gift and Loyalty issues the 4 points even if it cannot validate the transaction.

13. If you are using magnetic stripe cards that store account numbers on track 1, select **Use Track 1**. By default, Gift and Loyalty looks for account numbers on track 2.

14. Configure Point-of-Sale workstation behaviors:

    a. To prompt employees for a PIN number at the Point-of-Sale workstation during a transaction, select **Prompt for Pin for Program at POS**. If you do not select this option, you can configure this option by program in program configuration.

    b. To show the message `Transaction Complete` at the Point-of-Sale workstation after completing a transaction that issues loyalty points, select **Use Generic Point Issue Msg**. Oracle MICROS recommends considering this message for programs that do not accumulate points.

15. Select whether Gift and Loyalty resets customer Year-to-Date balances by **Calendar Year** or by the **Customer's First Transaction** from the **Year to Date Tracking** drop-down list.

16. Leave **Guest Instructions** and **Other Options** blank.

17. On the **Sales Itemizer Names** tab, set up to sixteen sales itemizers for the organization.

18. On the **Social Media** tab, select or deselect the social media platforms that Gift and Loyalty can post messages to based on transactions.

Setting Up myicard.net

1. In Reporting and Analytics, click **Initial iCare GPL Setup and Configuration** in the **iCare Account Administration** portlet, and then click **Organization Configuration**. If you cannot find the link, contact your system administrator.

2. Enter a **Help Desk Phone Number** to be shown on myicard.net.

3. To default new customers to a registration page on myicard.net, select **Default to Registration Page on First Log On**. When this option is enabled, customers cannot see their transaction history and current balance without completing their registration.

4. Click the **Guest Web Styles** tab, and then configure up to three styles:

    a. Enter the customer-facing URL that redirects to myicard.net in **URL**.

b. In the **URL Style Name**, enter the name of the style to be used by the URL when a user signs in.

c. In the **URL Style Directory**, enter the server path for the style.

d. Select **URL Requires PIN** to require the user to enter a PIN after signing in.

7

Program Configuration References

This document tries to simplify individual configuration instructions to explain pages and fields that are required or applicable to specific objectives. This chapter contains reference topics that describe all pages and fields when configuring programs, for information and troubleshooting purposes.

Gift or Debit Program Configuration Reference

A gift or debit program involves cards that are loaded with a positive balance and redeemed at the workstation. Use this program for standard gift card programs and automatic reloading meal cards. Do not use this program for award balance.

Figure 7-1   Gift/Debit Rule Hierarchy
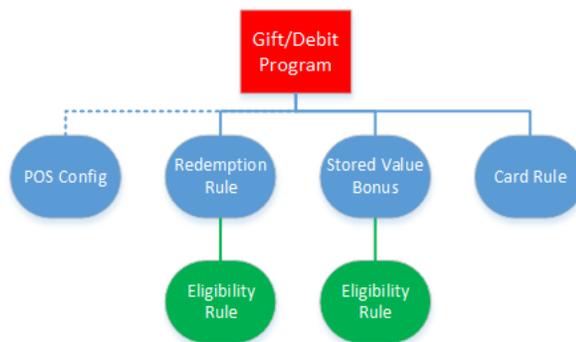
In the United States, each state legislature mandates how dormant charges may be applied and how expiration of gift certificates or gift cards must be handled. In some states, escheat laws mandate that some or all of the unclaimed amounts left on card accounts become the property of the state. The National Association of State Legislatures maintains a state-by-state listing of Legislation Regarding Gift Cards and Gift Certificates.

Contact your local or regional authorities for information about laws regarding dormant charges outside of the United States.

Creating a Gift or Debit Program

1. In Reporting and Analytics, click the link to go to the **Programs** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Click the **General** tab, and then select **Gift or Debit Card** from the **Program Type** drop-down list.

3. Enter an identifying name in **Program Name**, and optionally enter a **Description** for comments or notes regarding the program.

4. Enter the name to be shown and used on myicard.net in **Public Name**.

5. Enter an identifying code up to 10 alphanumeric characters in **Program Code**. This code is not made public.

6. Leave the **Coupon Code** blank.

7. Select **Same type, amount, and check** from the **Credit Reversal** and **Debit Reversal** drop-down lists.

8. To use a separate landing page style, enter the name of the style dictionary in **Override Style Directory**.

9. Configure currency settings for the program:

   a. Select the default currency type used by the program from the **Currency Type** drop-down list.

   b. Select **Allow Foreign Currency** to allow the usage of other currency in transactions.

10. Configure whether to allow a card rule to be used with other programs. By default, a card rule can only be used for one program.

    a. Select **Allow Multiple Programs/Card Rule** to allow the card rule for this program to be linked to other programs. Do not select this option if you want to keep the card rule unique to this program.

    b. Select **Prompt for Program at POS** if you want the Point-of-Sale application to prompt the user to select which program to use. Enable this option to avoid confusion when a card can be used for more than one program.

11. Configure user authentication for the program:

    a. Select or deselect **Prompt for PIN on myiCard.net**, **Prompt for PIN with Swipe at POS**, and **Prompt for PIN with Manual Entry at POS** to control when a customer must enter their personal identification number.

    b. Select the method for generating the default PIN for a new user from the **Pin Type** drop-down list.

    c. Leave the **Web Password Type** blank.

12. For programs with a limited duration, select the date range that the Gift/Debit program is active using the **Effective From** and **Effective To** date selection fields. Leave the fields blank if the program has an indefinite duration.

Configuring Gift or Debit Programs

1. Click the **Gift or Debit/Credit/Award Programs** tab.

2. To allow customers to cash out a gift/debit card:

   a. Select **Allow Cash Out**.

   b. Enter a **Cash Out Limit** to set an upper limit to the amount that can be cashed out.

3. Select **Use with SV Bonus Only** to use the card with a stored value bonus program.

4. Select **Reserve for Auth** to allow the Point-of-Sale to reserve the remaining balance of a card for tipping. The amount is freed from the reserve if it is not used within eight hours or if the card is used for another transaction.

5. Select **Allow Reload** to let customers add value to the debit card from a workstation. Do not select this option if the debit card is a single-use card. This option does not affect gift cards.

6. Enter a **Maximum Account Balance** to set an upper limit on the amount that can be stored on a card at any time.

7. Enter a **Transaction Limit** to set an upper limit to the amount that can be issued or reloaded to a card in a single transaction. Oracle MICROS recommends entering a value to prevent input errors.

8. Configure award redemption:

   a. Select **Allow Partial Redeem** to allow the Point-of-Sale to redeem the total value of the card when it is used for a check with a higher value. For example, when applying a gift card with $5 remaining to a $10 check, if this option is enabled, the system applies the $5 from the card to the check. If this option is not enabled, the system shows an insufficient balance error, and the balance must be manually redeemed.

   b. Select **Do Not Allow Issue/Reload and Redemption on Same Check** to prevent issuing, reloading, and redemption actions to be performed on the same check.

   c. Enter a **Max Redeem Amount/Day**, **Max Redeem Amount/Day Part**, or **Max Redeem Amount/Visit** to set an upper limit to the reward amount that can be redeemed by day, day part, or visit.

   d. Select **Require Customer On Redeem** to require customer information to be linked to the stored value account before awards can be redeemed. Customer information can be updated through myicard.net, Gift and Loyalty web service requests, and Gift and Loyalty Account Administration. When adding customer information through myicard.net, the **Sync iCare Transactions with Location Activity** and **Sync New iCare Customers with Customer Activity** operations must run before a Point-of-Sale transaction updates and reviews customer information.

9. Configure inactive cards:

   a. Enter the number of months in **Dormant Charge Start** before an inactive card account begins being charged a penalty.

   b. Enter the number of points in **Dormant Charge** charged to the inactive card account.

   c. Enter the frequency in months in **Dormant Charge Frequency** that an inactive card is charged.

10. Configure reloading and carry-over for cards based on stored value periods:

    a. Enter a **Period Carry Over Amount** to specify the amount that can be carried over from one stored value period to another.

    b. Enter a **Period Reload Amount** to specify the amount that is automatically loaded into the card at pre-defined intervals.

11. Configure card expiration:

    a. Select a validity period from the **Valid Until Type** drop-down list.

    b. For **Set Inactive After X Periods of Inactivity**, **Valid for X Periods**, and **Valid Until Period End**, select the **Valid Until Period Type** and enter the **Valid Until Number Periods** to set the amount of time before a card expires.

    c. For **Valid Until Date**, select the date in the **Valid Until Date** date selection field that all cards of this type expire.

12. Configure a Spend or Lose program, which loads cards with a scheduled amount that cannot carry over:

      a.   Select **Enable Spend or Lose**.

      b.   Enter a **Spend or Lose Allowance** to define the amount loaded to the cards.

      c.   Enter a **Spend or Lose Description** to help users identify the transaction.

      d.   Select a loading interval from the **Spend or Lose Schedule** drop-down list. If you select **Weekly**, select the day of week that the amount resets from the **Spend or Lose Start** drop-down list.

13. Click **Save**.

Loyalty Programs Configuration Reference

Loyalty programs allow customers to accumulate points for awards.

Creating a Loyalty Program

1. In Reporting and Analytics, click the link to go to the **Programs** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Click the **General** tab, and then select **Loyalty** from the **Program Type** drop-down list.

3. Enter an identifying name in **Program Name**, and optionally enter a **Description** for comments or notes regarding the program.

4. Enter the name to be shown and used on myicard.net in **Public Name**.

5. Enter an identifying code up to 10 alphanumeric characters in **Program Code**. This code is not made public.

6. Leave the **Coupon Code** blank.

7. Select **Same type, amount, and check** from the **Credit Reversal** and **Debit Reversal** drop-down lists.

8. To use a separate landing page style, enter the name of the style dictionary in **Override Style Directory**.

9. Configure currency settings for the program:

      a.   Select the default currency type used by the program from the **Currency Type** drop-down list.

      b.   Select **Allow Foreign Currency** to allow the usage of other currency in transactions.

10. Configure whether to allow a card rule to be used with other programs. By default, a card rule can only be used for one program.

      a.   Select **Allow Multiple Programs/Card Rule** to allow the card rule for this program to be linked to other programs. Do not select this option if you want to keep the card rule unique to this program.

      b.   Select **Prompt for Program at POS** if you want the Point-of-Sale application to prompt the user to select which program to use. Enable this option to avoid confusion when a card can be used for more than one program.

11. Configure user authentication for the program:

     a. Select or deselect **Prompt for PIN on myiCard.net**, **Prompt for PIN with Swipe at POS**, and **Prompt for PIN with Manual Entry at POS** to control when a customer must enter their personal identification number.

     b. Select the method for generating the default PIN for a new user from the **Pin Type** drop-down list.

     c. Leave the **Web Password Type** blank.

12. For programs with a limited duration, select the date range that the program is active using the **Effective From** and **Effective To** date selection fields. Leave the fields blank if the program has an indefinite duration.

Configuring a Loyalty Program

1. Click the **Loyalty Programs** tab.

2. Enter the name of the loyalty points in **Loyalty Points Name**. For example, points, chips, and bonus bucks.

3. For stored value awards, enter the name of the default award program used with this loyalty program in **Default Award Program**.

4. To configure whether points for this program expire or are indefinite:

     a. Select the expiration rule from **Points Valid Until Type**:

- **Never Reset Points**: Points do not expire.

- **Reset Points After x Periods**: Points expire after a set number of periods worth of days have transpired since the date they are earned. For example, you can set points to expire 60 days after they have been earned.

- **Reset Points After x Rolling Periods**: Points expire after a set number of periods have passed after the current period. For example, if you set points to expire after two months, and a customer earns points in the middle of May, then the points will expire at the end of July.

     b. Set the interval until point expiration by setting the unit of time in **Points Valid Until Period Type**, and then entering the number of units in **Points Valid Until Number Periods**. For example, two set an expiration of 60 days, select **Days** and then enter 60.

5. To configure whether accounts for this program can become set to inactive:

     a. Select the inactivity rule from **Points Valid Until Type**:

- **Always Valid**: Accounts do not become inactive.

- **Set Inactive After x Periods**: Accounts become inactive after a set number of periods have transpired since the last day they were used. For example, you can set accounts to become inactive after 120 days.

- **Set Inactive After x Rolling Periods**: Accounts become inactive after a set number of periods have passed after the current period. For example, if you set accounts to become inactive after four months, and a customer does not visit the store after the middle of May, the account will go inactive at the end of November.

     b. Set the interval until point expiration by setting the unit of time in **Points Valid Until Period Type**, and then entering the number of units in **Points Valid Until Number Periods**. For example, to set an expiration of 60 days, select **Days** and then enter 60.

6. When using the Stored Value Card interface version 2.5, or when using Stored Value Card interface version 4.*x* with Oracle MICROS RES 3700, you can select whether to redeem linked stored value before processing the loyalty points transaction:

   a. Select whether to redeem linked stored value using the **Combine Function on Issue Points** drop-down list:

      • **Do Not Combine Function**: Select this for stored value cards that cannot use the combined function feature. Gift and Loyalty processes the point transaction and performs no other automated steps.

      • **Combine Redemption**: Gift and Loyalty redeems linked stored value and then issues points.

      • **Combine Redemption Authorization**: Gift and Loyalty redeems linked stored value and then issues points. If there is no linked currency program, Gift and Loyalty processes the points transaction and shows the message: `Points have been issued. Cannot redeem, debit or credit account does not exist.`

   b. Select **Non-iCare Redemption** if the stored value will be redeemed using a third-party application.

7. Select the priority for the program in **Precedence**. If more than one program would apply to a transaction, Gift and Loyalty applies the programs according to their precedence values from highest to lowest.

8. Select **Auto Create Loyalty Accounts** to have Gift and Loyalty automatically create a new loyalty account when it encounters a new card number. If you do not select this option, a loyalty account number must be created before a card can be used.

9. Select **Allow Multiple Cards in Same Transaction** to accept more than one loyalty card in the same transaction. For example, this option allows a customer to use more than one gift card to pay for a purchase.

10. Select **Check for Coupons to Issue or Redeem** to force Gift and Loyalty to check the program rules that apply to the customer's account, and then to apply any coupons available to the customer to the current transaction. This functionality can cause performance issues with points transactions.

11. Select **Do not allow Double Dipping** to prevent customers from using points in the same transactions that they were earned. For example, if a transaction awards a customer with enough points for a 15% discount on their next purchase, they cannot use the 15% discount on the same transaction.

12. Configure point redemption:

    a. Select **Enable Redeem Points** to allow points to be redeemed at the Point-of-Sale.

    b. Enter the monetary conversion value for each point in **Point Redeem Value**. For example, if each point is worth $0.10, then enter `0.1`.

    c. Enter the increments at which a customer can redeem points in **Point Redeem Increments**. For example, if you enter `5`, customers can only redeem points in increments of 5 (such as 5, 10, 15, and 20).

    d. Enter the minimum number of points that a customer must accrue before they can redeem points in **Minimum Point Threshold**. For example, enter `25` to require that a customer have 25 points in their balance before they can redeem points.

13. Configure Point-of-Sale prompts:

   a. Select **Prompt For Coupon At POS** to show a list of available coupons for the loyalty card and transaction. You can then select a coupon and enter a serial number to apply the coupon to the transaction.

   b. Select **Prompt For Redeem On Issue Points** to ask whether the customer wants to redeem stored value during a points transaction.

   c. When using the Stored Value Card interface version 4.*x* with RES 3700, select **Prompt For Accept Coupon On Issue Points** to show a list of coupons that can be used for the current points transaction. You can then select a coupon to apply to the transaction.

14. Select **Hide Point Balance** to hide the point balance from the transaction chit and from myiCard.net.

15. Click **Save**.

Credit Card Programs Configuration Reference

Credit programs are issued with $0 and charge into the negative. These accounts can be reset back to 0 on a recurring basis or they can be paid via transactions posted in the account admin portal. These accounts cannot be reloaded from a workstation. These can be tied to card rules and redemption rules.

Creating a Credit Card Program

1. In Reporting and Analytics, click the link to go to the **Programs** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Click the **General** tab, and then select **Credit Card** from the **Program Type** drop-down list.

3. Enter an identifying name in **Program Name**, and optionally enter a **Description** for comments or notes regarding the program.

4. Enter the name to be shown and used on myicard.net in **Public Name**.

5. Enter an identifying code up to 10 alphanumeric characters in **Program Code**. This code cannot be seen by the guest.

6. Leave the **Coupon Code** blank.

7. Select **Same type, amount, and check** from the **Credit Reversal** and **Debit Reversal** drop-down lists.

8. To use a separate landing page style, enter the name of the style dictionary in **Override Style Directory**.

9. Configure currency settings for the program:

   a. Select the default currency type used by the program from the **Currency Type** drop-down list.

   b. Select **Allow Foreign Currency** to allow the usage of other currency in transactions.

10. Configure whether to allow a card rule to be used with other programs. By default, a card rule can only be used for one program.

    a. Select **Allow Multiple Programs/Card Rule** to allow the card rule for this program to be linked to other programs. Do not select this option if you want to keep the card rule unique to this program.

    b. Select **Prompt for Program at POS** if you want the Point-of-Sale application to prompt the user to select which program to use. Enable this option to avoid confusion when a card can be used for more than one program.

11. Configure user authentication for the program:

    a. Select or deselect **Prompt for PIN on myiCard.net**, **Prompt for PIN with Swipe at POS**, and **Prompt for PIN with Manual Entry at POS** to control when a customer must enter their personal identification number.

    b. Select the method for generating the default PIN for a new user from the **Pin Type** drop-down list.

    c. Leave the **Web Password Type** blank.

12. For programs with a limited duration, select the date range that the program is active using the **Effective From** and **Effective To** date selection fields. Leave the fields blank if the program has an indefinite duration.

Configuring a Credit Card Program

1. Click the **Gift or Debit/Credit/Award Programs** tab.

2. Select **Allow Partial Redeem** to allow the Point-of-Sale to redeem the total value of the card when it is used for a check with a higher value. For example, when applying a credit card with $5 remaining to a $10 check, if this option is enabled, the system applies the $5 from the card to the check. If this option is not enabled, the system shows an insufficient balance error, and the balance must be manually redeemed.

3. Select **Do Not Allow Issue/Reload and Redemption on Same Check** to prevent issuing, reloading, and redemption actions to be performed on the same check.

4. Enter the maximum amount that the account can be charged into the negative for the program in **Default Credit Limit**.

5. Enter the text shown when the account reaches the credit limit in **Credit Denial Text**.

6. Configure card expiration:

    a. Select a validity period from the **Valid Until Type** drop-down list.

    b. For **Set Inactive After X Periods of Inactivity**, **Valid for X Periods**, and **Valid Until Period End**, select the **Valid Until Period Type** and enter the **Valid Until Number Periods** to set the amount of time before a card expires.

    c. For **Valid Until Date**, select the date in the **Valid Until Date** date selection field that all cards of this time expire.

    d. Make sure to schedule an expiration date sync job.

7. Select **Require Customer On Redeem** to require customer information to be linked to the store value account before awards can be redeemed. Customer information can be updated through myicard.net, Gift and Loyalty web service requests, and Gift and Loyalty Account Administration. When adding customer information through myicard.net, the **Sync iCare Transactions with Location Activity** and **Sync New iCare Customers with Customer Activity** operations

must run before a Point-of-Sale transaction updates and reviews customer information.

Assigning Rules to Programs

With the exception of loyalty awards for loyalty programs, you can assign configurations such as loyalty points accrual, stored-value bonuses, and transaction eligibility to programs and then to locations. This allows you to create and maintain configurations for regions or locations while retaining program configurations and data continuity.

1. In Reporting and Analytics, click **Programs, Cards, Coupons and Rules**, and then click **Programs** in the **iCare Gift, Payment, and Loyalty Configuration** portlet. If you cannot find the link, contact your system administrator.

2. Assign the rules as described in the following table:

To assign...	Click...	And then set...
Cards	Edit Card Rules	**Auto Create Acc Number**: select if you want Gift and Loyalty to generate an account number for each new card.
		Org Level: select the location or organization level for which the configuration applies.
Additional stored value	Edit SV Bonus Rules	**Org Level**: select the location or organization level for which the configuration applies.
Reward points accrual	Edit Loyalty Rules	**Loyalty Rule**: select the points accrual configuration (loyalty rule).
		Org Level: select the location or organization level for which the configuration applies.
		Card Rule: select a card rule to restrict points accrual to transactions that use the selected type of cards.
		Effective To/From: select a date range during which the points can be accrued.
Restrictions for redeemable items	Edit Redemption Rules	**Org Level**: select the location or organization level for which the configuration applies.

8

Rule Configuration References

This document tries to simplify individual configuration instructions to explain pages and fields that are required or applicable to specific objectives. This chapter contains reference topics that describe all pages and fields when configuring rules, for information and troubleshooting purposes.

Card Rule Configuration Reference

Programs require at least one card rule, which define the types of cards that work for the program. Gift and Loyalty programs typically have a single iCard rule, while programs migrating from other providers typically have rules for third-party cards and iCards.

Creating Card Rules for iCard

1. In Reporting and Analytics, click **Card Rules** in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Enter an identifying name in the **Rule Name**.

3. Select **Is this an iCard?**, and then click **Create**. Gift and Loyalty generates the iCard Program Number.

4. To simplify identification when using the rule, you can edit the card rule and add the program number to the name. For example, if you create the card rule `Example Card Rule`, and Gift and Loyalty generates the program number `1234`, you can change the name to `1234 – Example Card Rule` to easily identify the program number for the rule.

Creating Card Rules for Third-Party Cards

Gift and Loyalty supports card rules for third-party cards, but imposes the following restrictions:

- Card numbers must not exceed 16 card number digits.

- Card numbers cannot start with alphabetical characters, a leading digit of `0`, or the `#` symbol.

- myicard.net does not support third-party card rules. While many card rules will function, myicard.net cannot ensure that a card number is unique and cannot ensure that a third-party card number will open the correct account.

1. In Reporting and Analytics, click **Card Rules** in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Enter an identifying name in the **Rule Name**. To simplify identification when using the rule, include the card preamble in the name. For example, `1234 – Example Card Rule`.

3. In the **Check Digit Type** drop-down list, select **Do Not Test for Check Digit** unless you know the check digit processing information.

4. Enter the preamble in **Foreign Card Preamble**. The field accepts up to 10 alphanumeric characters.

5. Enter the number of card number digits in **Foreign Card Length**. The length must include the preamble.

6. Enter the fixed currency amount in **Foreign Card Denomination**.

7. Set the date and time range for the card rule, and then click **Save**.

Eligibility Rule Configuration Reference

Eligibility rules...

Configuring Eligibility Rules

Eligibility rules are used to define which transactions are eligible for specific functions. The most common use is to define which transaction qualify for loyalty functions. Eligibility rules are also used to define what is eligible for Loyalty Awards and Coupon and what can be redeemed with specific accounts. Eligibility rules can be limited by time, items, or sales itemizers.

An eligibility rule may be created to:

- require a minimum guest check total to satisfy award requirements, or
- calculate loyalty points based on the guest check total.

In calculating the guest check total, the eligibility rule can be configured to include or exclude the following items from the guest check detail:

- service charges
- taxes
- partial payments

1. In Reporting and Analytics, click the link to go to the **Eligibility Rules** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Select the **Rule Type**:

   - **Use with Loyalty Rule**: Select to define which transactions are eligible to earn points in a loyalty program or to define which items can be discounted for an immediate discount award.

   - **Use with Redemption Rule**: Select to limit which items can be purchased with a stored value or pay with points program.

   - **Use with Coupon Rule**: Select to define which items can be discounted by a coupon.

   - **Use with Stored Value Bonus Rule**: Select to define which transactions qualify for a stored value bonus.

3. Enter an identifying name and description for the eligibility rule.

4. Configure whether Gift and Loyalty includes the following items when calculating the subtotal for a check:

- **Include Service Charges**: Select to include service charges when calculating the minimum check value or when calculating loyalty points. Do not select if the minimum check value calculates using the net transaction total.

- **Include Taxes**: Select to include taxes when calculating the minimum check value or when calculating loyalty points. Do not select if the minimum check value calculates using the net transaction total.

- **Exclude Payment**: Select to exclude partial payments applied to the transaction when calculating the minimum check value or when calculating loyalty points. Use this option to prevent situations where a guest makes a payment to the check using a gift card and receives points for the purchase.

- **Require Stored Value**:

5. To set a minimum transaction value required for rewards or points eligible, enter a **Check Min Value**. This configuration is typically used to restrict points being issued on small transactions in point-per-visit programs.

6. To configure rewards or points eligibility based on items:

   a. Select an eligibility rule from the **Item Rule Type** drop-down list:.

      - **Num of Items in Transaction**: minimum number of items in the specific transaction.

      - **Num Combos in Transaction**: minimum number of combo meals in the specific transaction.

      - **Num Items in Transaction this Period**: minimum number of times the item was included in a transaction over the current period

      - **Num Combos in Transaction this Period**: minimum number of times the combo meal was included in a transaction over the current period.

   b. Enter the minimum amount requirement in **Item Quantity**.

   c. Select **Items must be unique** to count only unique items toward the eligibility rule.

   d. To set an interval before items can be counted toward eligibility again, set the rule from the **Unique Item Expiration Method** drop-down list:

      - **Never Expire**: Do not allow unique items to be counted toward eligibility again.

      - **Expire items after x periods**: Unique items expire after a set number of periods worth of days have transpired since the date of purchase. For example, if you set unique items to expire after 3 periods and the rule uses weekly periods, the item expires exactly three weeks after the date of purchase.

      - **Expire items after x rolling periods**: Unique items expire after a set number of periods have passed after the current period. For example, if you set unique items to expire after 3 periods and the rule uses weekly periods, the item expires three weeks after the end of the current weekly period.

      - **Reset all items after x periods**: All unique items expire after a set number of periods worth of days have transpired since the date the first item was purchased.

      - **Reset all items after x rolling periods**: All unique items expire after a set number of periods have passed after the current period.

   e. To set an upper limit of unique items remembered for each customer, enter a **Max Saved Unique items/account**.

7. When using time periods for minimum item transactions or for unique item expiration, select the period type from the **Period Type** drop-down list. When using a number of time periods for unique item expiration, enter the **Number of Periods**.

8. For eligibility rules that are not indefinite, select a start and end date in the **Effective From** and **Effective To** fields.

9. Leave the **Other Options** field blank.

10. If you configure the rule to determine eligibility based on the purchase of combo items:

    a. Click the **Combos** tab.

    b. If the combo items are eligible for discount, select **Combo is Discountable**.

    c. Enter the name for each item group included in the combo items.

11. If you want to use Sales Itemizers to calculate points from a transaction, click the **Sales Itemizers** tab, and then select the itemizers that you want to enable. Itemizers do not affect the calculation of awards, and can be configured in the Gift and Loyalty organization configurations.

12. Click **Save** to finalize the eligibility rule.

Configuring Menu Item and Item Groups to an Eligibility Rule

Add menu items, family groups, and major groups to an eligibility rule.

1. In Reporting and Analytics, click the link to go to the **Eligibility Rules** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet. If you cannot find the link, contact your system administrator.

2. Select the eligibility rule, click **Edit Item Rules**, and then click **Add**.

3. Select the eligible matching method:

    • **Menu Item POS Ref (Object Number)**: Qualify items based on the POS object number.

    • **Menu Item Master**: Qualify items aligned to a specific master item.

    • **Major Group POS Ref (Object Number)**: Qualify items associated with a major group based on the POS object number.

    • **Major Group Master**: Qualify items associated or aligned with a master major group.

    • **Family Group POS Ref (Object Number)**Qualify items associated with a family group based on the POS object number.

    • **Family Group Master**: Qualify items associated or aligned with a master family group.

4. If you selected a matching method that uses a POS object number, enter the **POS Ref/Item Number**.

5. If you selected a matching method that uses a master item or group, use the search and select the master item or group to set the **Master** field.

    For family groups, select the master family group from the **Master** drop-down list.

6. If menu items must be purchased together to be eligible for a discount, select the **Combo Group Number**.

7. Select whether the item is a **Discountable Item** with regards to discounts or coupons, and whether the item is a **Qualified Item** that can qualify a transaction. Use the following table to determine whether one or both of these options is applicable:

- For point-based loyalty rules:

Table 8-1　Discount and Qualified Applicability of Loyalty Point Calculation Methods

Point calculation methods	Discountable	Qualified
Per visit	Not applicable	Optional
Per check value	Not applicable	Optional
Number of selected items	Not applicable	Required
Value of selected items	Not applicable	Required
Number of unique selected items	Not applicable	Required
If any selected item on check	Not applicable	Required
New items this period	Not applicable	Required
Additional points if selected	Not applicable	Required
Use multiplier if selected	Not applicable	Optional
Time rule only	Not applicable	Optional
Additional points by visit	Not applicable	Optional
Use multiplier threshold exceeded	Not applicable	Optional
Per check value if any selected	Not applicable	Required
Per defined check value	Not applicable	Required

- For coupon and award loyalty rules:

Table 8-2　Discount and Qualified Applicability of Coupon and Award Value Calculation Methods

Value calculation methods	Discountable	Qualified
Use POS Preset Discount (subtotal calc)	Not applicable	Not applicable
Use Fixed Value Amount (subtotal calc)	Not applicable	Not applicable
Use Percentage of Check Subtotal (subtotal calc)	Not applicable	Not applicable
Use Percentage Up to Limit (subtotal calc)	Not applicable	Not applicable
Use Price of Cheapest Item	Required	Not needed
Use Price of Cheapest Item Not to Exceed	Required	Not needed
Use Percentage of Cheapest Item Not to Exceed	Required	Not needed
Use Price of Most Expensive Item	Required	Not needed
Use Percentage of Most Expensive Item	Required	Not needed
Use Price of Most Expensive Item Not to Exceed	Required	Not needed
Use Percentage of Most Expensive Item Not to Exceed	Required	Not needed
Use Percentage of Selected Items Not to Exceed	Required	Not needed
Use Price of Equal or Lesser than	Required	Required

Table 8-2   (Cont.) Discount and Qualified Applicability of Coupon and Award Value Calculation Methods

Value calculation methods	Discountable	Qualified
Use Price of Equal or Lesser than Not to Exceed	Required	Required
Use Percentage of Equal or Lesser than	Required	Required
Use Percentage of Equal or Lesser than Not to Exceed	Required	Required
Use Price of All Eligible Items (Not Available for Coupon Type)	Required	Required

8. Click **Save**.

Adding Time Restrictions to an Eligibility Rule

Add day or time period restrictions to an eligibility rule.

1. In Reporting and Analytics, click the link to go to the **Eligibility Rules** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet. If you cannot find the link, contact your system administrator.

2. Select the eligibility rule, click **Edit Item Rules**, and then click **Add**.

3. Define the type of time rule from the **Type** drop-down list. The following table shows what transactions are affected by which time rule:

Table 8-3   Transactions Affected by Time Restriction Types

Time Rule Type	Stored Value Redemption	Loyalty Point Eligibility	Coupon Redemption
Bonus Period		Affected	
Blackout Period	Affected	Affected	Affected
Activate Blackout Period	Affected		
Birthday Anniversary		Affected	
Signup Anniversary		Affected	
Consecutive Period		Affected	
Active Period		Affected	Affected

4. To restrict the rule by the day of the week, select the **Days of Week** checkboxes.

5. To restrict the rule by time of day, select the times in **Start Fixed Period** and **End Fixed Period**.

6. To restrict the rule by a period of days, select the days using **Effective From** and **Effective To**.

7. For Birthday Anniversary or Signup Anniversary types, you can configure a period before and after the anniversary date during which the time restriction is in effect:

   a. Select whether to set the range in days, weeks, or months from **Period Range Type**.

   b. Enter the range in **Periods Before or After**.

8. Click **Save**.

Configuring Coupon Types

Follow these instructions to create coupons that can be used as awards for loyalty programs or issued to customers separately. Each set of coupons can be configured to calculate discounts based on item prices, based on the check total, or to give a constant percentage or amount discount.

1. In Reporting and Analytics, click the link to go to the **Coupon Types** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Enter a name and description for the coupon.

3. Enter an identifying **Coupon Code**. The coupon code cannot be changed after at least one coupon is issued.

4. Configure how the coupon is issued to a customer:

   a. To set requirements for being issued the coupon, select an **Issue Eligibility Rule**.

   b. Select how the coupon is issued to customers from **Issue Instructions**:

   • **Issue at POS Terminal**: the program issues coupons to customers at the Point-of-Sale terminal, for example by printed with the receipt when the conditions are met.

   • **Not Issued at POS Terminal**: the program issues coupons to customers through other means, for example using the local newspaper or by mail.

   • **Issued by Email**: the program issues coupons to customers using their registered email address. Select the location from which the coupon should be emailed from the **Email Issuing Location** drop-down list.

5. Configure how customers can use the coupon:

   a. To set constraints to when a customer can use the coupon, select a **Redemption Eligibility Rule**.

   b. Select how customers use the coupon from **Redemption Instructions**

   • **Coupon must be present at POS**: the customer must physically present the coupon.

   • **Automatically redeem coupon during transaction**: if the transaction is eligible, the system automatically applies the coupon.

6. Configure the discount amount from **Value Calc Method**:

   • **Use POS Preset Discount**: A discount configured in the Point-of-Sale application determines the amount and items discounted.

   • **Use Fixed Value Amount**: Set a subtotal discount, such as 5$ off the guest check. Enter the amount in **Fixed Value**.

   • **Use Percentage of Check Subtotal**: Set a subtotal percentage discount, such as 5% off the guest check. Enter the percentage in **Percentage**

   • **Use Percentage up to Limit**: Set a subtotal percentage discount but with an upper limit of a given amount, such as 5% off the guest check but only up to 15$. Enter the percentage in **Percentage** and the upper limit in **Fixed Value**.

   • **Use Price of Cheapest Item**: Discount the entire price of the cheapest eligible item.

- **Use Percentage of Cheapest Item**: Discount a percentage of the cheapest eligible item. Enter the percentage in **Percentage**.

- **Use Price of Cheapest Item Not To Exceed**: Discount the price of the cheapest eligible item but with an upper limit of a given amount. Enter the upper limit in **Fixed Value**.

- **Use Percentage of Cheapest Item Not To Exceed**: Discount a percentage of the cheapest eligible item but with an upper limit of a given amount. Enter the percentage in **Discount Percentage** and the upper limit in **Fixed Value**.

- **Use Price of Most Expensive Item**: Discount the entire price of the most expensive eligible item.

- **Use Percentage of Most Expensive Item**: Discount a percentage of the most expensive eligible item. Enter the percentage in **Percentage**.

- **Use Price of Most Expensive Item Not To Exceed**: Discount the price of the most expensive eligible item but with an upper limit of a given amount. Enter the upper limit in **Fixed Value**.

- **Use Percentage of Most Expensive Item Not To Exceed**: Discount a percentage of the most expensive eligible item but with an upper limit of a given amount. Enter the percentage in **Percentage** and the upper limit in **Fixed Value**.

- **Use Percentage of Selected Items Not To Exceed**: Discount a percentage of all eligible items but with an upper limit of a given amount. Enter the percentage in **Percentage** and the upper limit in **Fixed Value**.

- **Use Price of Equal or Lesser than**: Discount the entire price of an item that is equal to or lower than the qualified eligible item. For example, use this discount to allow customers to order two entrees and get a third free, provided the price of the third entree is equal to or lower than the first two.

- **Use Price of Equal or Lesser than Not to Exceed**: Discount the price of an item that is equal to or lower than the qualified eligible item, but up to a given amount. For example, use this discount to allow customers to order two entrees and get a third entree discounted up to 15$, provided the price of the third entree is equal to or lower than the first two. Enter the upper limit in **Fixed Value**.

- **Use Percentage of Equal or Lesser than**: Discount the a percentage off an item with a price that is equal to or lower than the qualified eligible item. For example, use this discount to allow customers to order two entrees and get 70% off a third, provided the price of the third entree is equal to or lower than the first two.

- **Use Percentage of Equal or Lesser than Not to Exceed**: Discount the a percentage off an item with a price that is equal to or lower than the qualified eligible item, but up to a given amount. For example, use this discount to allow customers to order two entrees and get 70% off a third up to 15$, provided the price of the third entree is equal to or lower than the first two. Enter the upper limit in **Fixed Value**.

- **Use Price of All Eligible Items**: Discount the entire price of all eligible items.

7. Select the priority for the coupon in **Precedence**. If there is a coupon conflict for a transaction, such as two coupons that discount the same item but prohibit usage with other offers, Gift and Loyalty processes the coupon with the highest precedence value.

8. To print a message on the receipt about the coupon, enter the message in **Print Text**.

9. Select **Allow Multiple Redemptions** to allow customers to use the coupon more than once.

10. Select the format for the coupon serial numbers generated by Gift and Loyalty:

    *   **All Numeric**: serial number contains only numeric characters, with at least six characters and no maximum length.

    *   **All Alpha (Limited Length)**: serial number contains alphanumeric characters, and must be between 4 to 12 characters.

    *   **Alpha with Check Digits (Limited Length)**: serial number contains alphanumeric characters, must be between 4 to 12 characters, and includes two check digits to catch fraudulent redemption attempts.

11. To limit the availability of the coupon, select the date range using the **Effective From** and **Effective To** date pickers. This date range does not affect coupon expiration settings.

12. To configure coupon expiration:

    a. Select the expiration rule from **Valid Until Type**:

        *   **Always Valid**: the coupon does not expire.

        *   **Valid for x periods**: the coupon expires after a set period of time. Use **Valid Until Period Type** and **Valid Until Num Periods** to configure the duration that the coupon can be used.

        *   **Valid Until Period End**: coupons that can be used more than once expire after a set period of time. Use **Valid Until Period Type** and **Valid Until Num Periods** to configure the duration that the coupon can be used.

        *   **Valid Until Date**: the coupon expires at a specific date. Use **Valid Until Date** to set the specific day.

    b. In some cases, points can be issued to transactions processed by the Gift and Loyalty web service at a later date. By default, coupons awarded by points issued this way use the date of the transaction to calculate the coupon expiration date. Select **Use Cur Date to Expire** to use the date the points were issued instead of the date of the transaction.

13. To allow manually issuing coupons of this type to customers through the coupon administration portlet, select **Allow Ad Hoc Issue**. For example, this option lets organizations issue coupons to specific customers or to bulk issue coupons.

14. To allow manually issuing coupons of this type to customers through the Point-of-Sale workstation, select **Allow POS Ad Hoc Issue**. For example, this option allows a store to issue customer service coupons when ringing a transaction.

15. Configure the **Accept Coupon** and **Coupon Inquiry** Point-of-Sale touchscreen keys.

Loyalty Rule Configuration Reference

Loyalty rules...

Configuring How Loyalty Points are Issued

1. In Reporting and Analytics, click the link to go to the **Loyalty Rules** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Enter a name for the points rule. Oracle MICROS recommends using an identifiable name based on the configurations, such as `single point per dollar`. You can enter a description for the rule for additional identification.

3. Enter a customer-facing name for the rule in **Public Name**. This name is shown on the customer transaction record and on myiCard.

4. Select the priority for the rule in **Precedence**. If more than one loyalty rule would apply to a transaction, Gift and Loyalty uses the rule with the highest precedence value.

5. Select **Print Points Until Award** to calculate the amount of points needed by the customer after the current transaction to reach the next award. You can add the `@PointsUntilAward@` print token to the POS print text to include the amount on the receipt.

6. Select **Points Round To Near** to allow points to round up. If you do not select this option, Gift and Loyalty rounds down.

7. Select an **Eligibility Rule** from the drop-down list to add an eligibility rule to this loyalty points rule.

8. Click the **Points** tab.

9. Configure how and how many points are issued:

Select...	To Issue Points Based On...	And Then Configure...
Per visit	When a guest visits a store.	**a.** Enter the number of points to be issued per visit in **Point Factor**. **b.** Select how to calculate the total balance after issuing the points. • **Point Balance Total**: current point total for the account. • **Lifetime**: total point accrual since account creation. • **Year to Date**: total point accrual over the past calendar year. • **Month to Date**: total point accrual over the past month.
Per check value	The value of the guest check.	**a.** Enter the number of points to be issued per dollar spent in **Point Factor**. **b.** Select how to calculate the total balance after issuing the points. • **Point Balance Total**: current point total for the account. • **Lifetime**: total point accrual since account creation. • **Year to Date**: total point accrual over the past calendar year. • **Month to Date**: total point accrual over the past month.
Number of selected items	The number of selected items purchased.	Enter the number of points to be issued per selected item purchased in **Point Factor**.

Select...	To Issue Points Based On...	And Then Configure...
Value of selected items	The value of the selected items purchased.	Enter the number of points to be issued per dollar spent on selected items in **Point Factor**.
Number of unique selected items	The number of unique selected items purchased.	Enter the number of points to be issued per each different item purchased from a predefined set in **Point Factor**.
If any selected item on check	When a guest purchases any of a group of selected items.	Enter the number of points to be issued if an item rule is met in **Point Factor**.
New items this period	When a guest purchases an item for the first time in a given time period.	Enter the number of points to be issued if a new item is purchased within a given time period in **Point Factor**.
Additional points if selected	If the transaction includes a selected item, issues an additional amount of points entered. This method can also be used to award points based on repeat visitation using the **Number of Days From First Trans** field if the transaction includes a selected item.	**a.** Enter the number of points to be issued if an item rule or time rule is met in **Point Factor**. **b.** Enter the number of additional points to be issued per visit in **Additional Points**.
Use multiplier if selected	If the transaction includes a selected item, applies a point multiplier.	**a.** Enter the number of points to be issued if an item rule or time rule is met in **Point Factor**. **b.** Enter the point multiplier in **Point Multiplier**.
Time rule Only	Transactions within a designated time frame.	Enter the number of points to be issued if a time rule is met in **Point Factor**.
Additional points by visit	Additional points per visit for each transaction.	**a.** Enter the number of points to be issued per visit in **Point Factor**. **b.** Enter the number of additional points to be issued per visit in **Additional Points**. **c.** Set the minimum number of days in between visits in **Number of Days From First Trans**.

Select...	To Issue Points Based On...	And Then Configure...
Use multiplier if threshold exceeded	If the transaction exceeds the configured threshold, applies a point multiplier.	**a.** Enter the number of points to be issued if the defined check value is met in **Point Factor**. **b.** Enter the point multiplier in **Point Multiplier**. **c.** Enter the threshold in **Point Threshold**.
Per check value if any selected...	The value of the guest check if the purchase contains any of a group of selected items.	Enter the number of points to be issued per dollar in **Point Factor**.
Per defined check value	Increments spent.	Enter the number of points to be issued per set number of dollars in **Per Defined Value**.

10. To configure an upper limit for issuing points:

   - Enter the maximum number of points that can be issued in a transaction in **Max Points Per Trans**.

   - Enter the maximum number of transactions that can be made in a single day part in **Max Trans Per Day Part**.

   - Enter the maximum number of transactions that can be made in a single day in **Max Trans Per Day**.

   - Enter the maximum number of transactions that can be made in a single week in **Max Trans Per Week**. Select the day that each week starts in **Max Trans Start of Week**.

11. Select **Do Not Allow Other Points** to prevent points from being issued by other loyalty rules when this loyalty rule issues points. For example, select this option to implement "not valid with any other offer."

12. Select **Do Not Issue Awards** to prevent awards from being issued in the same transaction. For example, select this option for adjustment transactions in which a user issues points but does not want to trigger immediate awards, such as a discount applied directly to the check.

13. Select **Tag As Bonus** to tag points in a program linked to this loyalty rule as bonus points. For example, select this option to communicate to customers that they earned 20 points for a transaction, and that 5 of the points were from a bonus.

14. Click **Save**.

Configuring Loyalty Point Awards

1. In Reporting and Analytics, click the link to go to the **Loyalty Rules** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Select **Points Award Rule** from the **Type** drop-down list.

3. Enter a name for the awards rule. Oracle MICROS recommends using an identifiable name based on the configurations, such as `Frequent Visitor Award`. You can enter a description for the rule for additional identification.

4. Enter a customer-facing name for the rule in **Public Name**. This name is shown on the customer transaction record and on myiCard.

5. Select the priority for the rule in **Precedence**. If more than one loyalty rule would apply to a transaction, Gift and Loyalty uses the rule with the highest precedence value.

6. Select **Print Points Until Award** to calculate the amount of points needed by the customer after the current transaction to reach the next award. You can add the `@PointsUntilAward@` print token to the POS print text to include the amount on the receipt.

7. Select **Points Round To Near** to allow points to round up. If you do not select this option, Gift and Loyalty rounds down.

8. Select an **Eligibility Rule** from the drop-down list to add an eligibility rule to this loyalty points rule.

9. Click the **Awards** tab.

10. Select the points total from **Balance Use Type** to use to determine the awards issued to a guest under this loyalty rule:

    • **Point Balance Type**: Current point balance.

    • **Lifetime**: Total points accumulated over the lifetime of the program.

    • **Year to Date**: Points accumulated in the current calendar year.

    • **Month to Date**: Points accumulated in the current calendar month.

    • **New customer info provided**: Award based on new customer data being registered with myicard.net.

11. Enter the number of points required for the award in **Point Threshold**.

12. Select the type of award from **Award Type**:

    • **Issue stored value credit**: Issue stored value to an award program.

    • **Issue immediate discount**: Issue a discount to the current transaction. Select a type of discount from the **Award Discount Type**.

        – **Use POS Preset Discount**: A discount configured in the Point-of-Sale application determines the amount and items discounted.

        – **Use Fixed Value Amount**: Set a subtotal discount, such as 5$ off the guest check. Enter the amount in **Discount & Award Amount**.

        – **Use Percentage of Check Subtotal**: Set a subtotal percentage discount, such as 5% off the guest check. Enter the percentage in **Discount Percentage**

        – **Use Percentage up to Limit**: Set a subtotal percentage discount but with an upper limit of a given amount, such as 5% off the guest check but only up to 15$. Enter the percentage in **Discount Percentage** and the upper limit in **Discount Limit**.

        – **Use Price of Cheapest Item**: Discount the entire price of the cheapest eligible item.

        – **Use Percentage of Cheapest Item**: Discount a percentage of the cheapest eligible item. Enter the percentage in **Discount Percentage**.

– **Use Price of Cheapest Item Not To Exceed**: Discount the price of the cheapest eligible item but with an upper limit of a given amount. Enter the upper limit in **Discount Limit**.

– **Use Percentage of Cheapest Item Not To Exceed**: Discount a percentage of the cheapest eligible item but with an upper limit of a given amount. Enter the percentage in **Discount Percentage** and the upper limit in **Discount Limit**.

– **Use Price of Most Expensive Item**: Discount the entire price of the most expensive eligible item.

– **Use Percentage of Most Expensive Item**: Discount a percentage of the most expensive eligible item. Enter the percentage in **Discount Percentage**.

– **Use Price of Most Expensive Item Not To Exceed**: Discount the price of the most expensive eligible item but with an upper limit of a given amount. Enter the upper limit in **Discount Limit**.

– **Use Percentage of Most Expensive Item Not To Exceed**: Discount a percentage of the most expensive eligible item but with an upper limit of a given amount. Enter the percentage in **Discount Percentage** and the upper limit in **Discount Limit**.

– **Use Percentage of Selected Items Not To Exceed**: Discount a percentage of all eligible items but with an upper limit of a given amount. Enter the percentage in **Discount Percentage** and the upper limit in **Discount Limit**.

– **Use Price of Equal or Lesser than**: Discount the entire price of an item that is equal to or lower than the qualified eligible item. For example, use this discount to allow customers to order two entrees and get a third free, provided the price of the third entree is equal to or lower than the first two.

– **Use Price of Equal or Lesser than Not to Exceed**: Discount the price of an item that is equal to or lower than the qualified eligible item, but up to a given amount. For example, use this discount to allow customers to order two entrees and get a third entree discounted up to 15$, provided the price of the third entree is equal to or lower than the first two. Enter the upper limit in **Discount Limit**.

– **Use Percentage of Equal or Lesser than**: Discount the a percentage off an item with a price that is equal to or lower than the qualified eligible item. For example, use this discount to allow customers to order two entrees and get 70% off a third, provided the price of the third entree is equal to or lower than the first two.

– **Use Percentage of Equal or Lesser than Not to Exceed**: Discount the a percentage off an item with a price that is equal to or lower than the qualified eligible item, but up to a given amount. For example, use this discount to allow customers to order two entrees and get 70% off a third up to 15$, provided the price of the third entree is equal to or lower than the first two. Enter the upper limit in **Discount Limit**.

– **Use Price of All Eligible Items**: Discount the entire price of all eligible items.

• **Issue coupon**: Issue a coupon code to the account. Enter the **Coupon Code** that this award should issue, and then enter a limit to the number of coupons that can be earned for each coupon program in **Max Coupons Per Program**.

By default, or with a null or `0` value, customers can earn a maximum of one coupon per program.

13. Enter the loyalty points cost for this award in **Point Cost**.

14. Enter text in **POS Print Text** that can be added to the chit to inform customers that an award was earned.

15. Select **Once per year** if customers can only earn this award once per year.

16. Select **Once per lifetime** if customers can only earn this award once per account.

17. Select **Require Customer info** if customers must be registered on myiCard.net to earn this award. Customers without a registered account can earn points and can have awards listed as pending, but Gift and Loyalty will not issue awards until the myiCard.net information is updated as required.

18. Select **Cross point threshold** to allow customers to continue earning points for additional awards after being issued this award.

19. Click **Save**.

Configuring Redemption Rules

Configure redemption rules to limit the items that can be redeemed with points or stored value cards. Pay with points programs require a redemption rule to function.

1. In Reporting and Analytics, click the link to go to the **Redemption Rules** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Enter an identifying **Name** for the redemption rule, and optionally enter a **Description** for comments or notes regarding the rule.

3. Select an **Eligibility Rule** that has been configured with the **Use with Redemption Rule** type. You do not need to select an eligibility rule.

4. From the **Type** drop-down list:

    • Select **Exclusive** to exclude transactions that contain certain purchases

    • Select **Inclusive** to require that transactions contain certain purchases.

5. Select the priority for the rule in **Precedence**. If more than one redemption rule would apply to a transaction, Gift and Loyalty uses the rule with the highest precedence value.

6. If a transaction contains eligible and ineligible items on a guest check, select **Limit to Eligible Amount** to allow Gift and Loyalty to redeem the value for the eligible items and leave the remaining balance of the check. If you do not select this option, Gift and Loyalty shows an error message and does not process the transaction.

7. For redemption rules that are not indefinite, select a start and end date in the **Effective From** and **Effective To** fields.

8. Enter **Delay Redemption of New Points (hours)** if you want Gift and Loyalty to include a waiting period before redemption.

    For example, if you set this value to `24` hours, when a guest earns 50 points for a transaction at 3pm, they cannot redeem the points until after 3pm the following day. This encourages guests to visit again to use their points.

9. Click **Save**.

Setting Up Stored Value Bonuses

Stored value bonus rules define the bonuses given to customers based on the purchase of stored value cards. These rules can award additional stored value as a percentage or dollar amount based on the number of cards purchased. The bonuses accrued can be awarded to the purchased card or to a separate card if bonus money rules differ from the standard gift card rules.

1. In Reporting and Analytics, click the link to go to the **Stored Value Bonus Rules** page in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **Add**. If you cannot find the link, contact your system administrator.

2. Enter an identifying **Name** for the stored value bonus rule, and optionally enter a **Description** for comments or notes regarding the rule.

3. Enter the minimum amount required for the card to qualify for the bonus in **Bonus Threshold**.

4. Configure the bonus type and amount:

   a. To configure a percentage-based bonus, select **Percentage** from the **Bonus Type** drop-down list, and then enter the percentage of the loaded amount to award in **Bonus Percentage**.

   b. To configure a fixed value bonus, select **Fixed Amount** from the **Bonus Type** drop-down list, and then enter the amount in **Bonus Amount**.

   c. To configure an incremental bonus, select **Stepped Amount** from the **Bonus Type** drop-down list, enter the amount awarded at the threshold and at each increment in **Bonus Amount**, and then enter each increment after the threshold in **Bonus Step Amount**. For example, if the threshold is $100, the step amount is 30$, and the bonus amount is $5, then a $150 stored value card will award an extra $10 due to the threshold and the single increment at $130.

5. Select **Use with Issue or Activate** to give the bonus amount when the card is issued or activated. Use this option for offers such as "receive $5 for signing up for a card."

6. Select **Use with Reload** to give the bonus amount when a customer adds or recharges the card. Use this option for offers such as "receive $5 every time you reload your card."

7. Select **Do Not Allow Other Bonus** to prevent multiple stored value bonus rules from applying to the same transaction. For example, select this option to implement "not valid with any other bonus offer."

8. Select **Issue Bonus to Separate Card** to give the bonus amount to a card other than the one being purchased or loaded.

9. Select the priority for the rule in **Precedence**. If more than one stored value bonus rule would apply to a transaction, Gift and Loyalty uses the rule with the highest precedence value.

10. Select an **Eligibility Rule** that has been configured with the **Use with Stored Value Bonus Rule** type. You do not need to select an eligibility rule.

11. For stored value bonus rules that are not indefinite, select a start and end date in the **Effective From** and **Effective To** fields.

12. Click **Save**.

9
Configuration References

Possibly a placeholder.

Configuring Point-of-Sale Touchscreen Keys

Configure the Point-of-Sale touchscreen keys to determine:

- Which object numbers each of the Gift and Loyalty functions post to in the Point-of-Sale application.
- Custom text to print on the Gift and Loyalty chit at the workstation.
- Availability of Gift and Loyalty functions both when the network is online and when the network is offline.

1. In Reporting and Analytics, click **Programs, Cards, Coupons and Rules** in the **iCare Gift, Payment, and Loyalty Configuration** portlet, and then click **POS Configuration**. If you cannot find the link, contact your system administrator.

2. To activate a function, select the function, click **Edit**, and then select **Active**.

3. To allow a function to be used when the system network is offline, select the function, click **Edit**, and then select **Allow Offline**.

4. To add or edit the text printed on a chit, select the function, click **Edit POS Print Text**, and then:

   a. Click **Add**, or select an existing text configuration and click **Edit**.

   b. In the **Print Text** field, enter the text to be printed on the chit. Printing Chits and Receipts contains a reference of print tokens and print directives that you can use when designing the output.

   c. To restrict the print configuration to a specific program or location, select a **Program**, **Org Level**, or **Revenue Center**.

   d. To restrict the print configuration to a limited timeframe, select the date range that the print configuration is active.

   e. Click **Save**.

5. To configure the key, select the function, click **Edit POS Key**, and then:

   a. Click **Add**, or select an existing key configuration and click **Edit**.

   b. Select when the workstation should show the touchscreen key from **Use Type**:

      - **Use Always**: Key is always available.
      - **Only Use When Account is Initially Opened**: Key is only available when handling a new account.
      - **Off-line**: Key is only available when the workstation loses connection with the host.

   c. Enter a **Description** for system administrators that can configure the settings for this key.

   d. Select the Point-of-Sale item type handled by the key in **POS Key Type**.

      If you select **Discount**:

      i. Enter a **Default Amount** for the discount.

      ii. Enter the minimum subtotal required before a transaction is eligible for the discount in **Min Check Subtotal**.

      iii. Select **Do Not Use if a Discount Already on Transaction** to prevent the system from applying this discount to a transaction already credited with a discount. You can use this option to implement discounts that cannot be used with other offers.

   e. Enter the Point-of-Sale database keynumber in **POS Key Number**.

   f. Use the following drop-down lists to limit the scope of the POS key. By default, the key is applicable to all rules and locations:

     • **Card Rule**

     • **Coupon Type**

     • **Program**

     • **Loyalty Rule**

     • **Org Level** or **Location Group**: Select one, click **Edit Location Groups**, and then configure the list of active groups at the level or location.

     • **Revenue Center**

   g. In **Print Reference Entry**, enter an alphanumeric string of up to 19 characters that can be appended to any transaction detail item on guest checks, customer receipts, remote printers, journal printers, and in the transaction details.

      Printing Chits and Receipts contains a reference of print tokens and print directives that you can used when designing the output.

   h. Select **Reconcile with POS** to register web settings at the Point-of-Sale level and to include the POS key number in the transaction records recorded by the host database. For example, this lets organizations compare the number of cards issued as recorded by the POS with the number of cards issued as recorded in the Gift and Loyalty database.

      If you do not select this option, web settings do not register at the POS level.

   i. To configure limited availability for the key, configure the date range in **Effective From** and **Effective To**.

Printing Chits and Receipts

Use the following print tokens and directives to configure Gift and Loyalty information to be included in a printed receipt or chit:

General-Purpose Print Tokens

Table 9-1   General-Purpose Print Tokens

Print Token	Description
@PointName@	The name of the loyalty points (the **Loyalty Points Name**) configured for the program. Examples include points, chips, and bonus bucks.
@ProgramName@	The program name.
@AccountNumber@	The full customer account number.
@ObfuscatedAccountNumber@	A masked version of the customer account number, with only the last four digits visible. An example output might be *****-1234.
@AccountBalance@	The current balance of the customer account after the transaction.
@ExchangeRate@	The exchange rate used by the transaction.
@LocalAccountBalance@	The current balance of the customer account, but in the local currency of the location.
@AuthCode@	Authorization code.
@PointsBalance@	The current amount of points accrued by the customer account after the transaction.
@Points@	The amount of points issued in this transaction.
@PointsUntilAward@	The amount of points needed to reach the next award after this transaction.
@BonusPoints@	The amount of points issued as a bonus in this transaction.
@LocationName@	The name of the location or store.
@AwardText@	The message configured for the loyalty award (the **POS Print Text**).
@CustomerTier@	The customer tier level as configured in the loyalty programs.
@ytdTotal@	The amount of points earned by the customer during the current year. Depending on the **Balance Use Type** loyalty points rule configuration, this can be tracked by calendar year or by the account creation date.
@mtdTotal@	The amount of points earned by the customer during the current calendar month.
@lifetimeTotal@	The amount of points earned by the customer over the lifetime of the account.

Coupon Print Tokens

When a transaction issues a coupon, the following print tokens can be used to show information pertaining to the coupon:

- @CouponCode@: coupon code.

- @CouponName@: name.

- `@CouponSerialNumber@`: serial number.

- `@CouponValidUntilDate@`: expiration date

- `@CouponValue@`: value.

Date Print Tokens

When a transaction issues a coupon, the following print tokens can be used to show information pertaining to the coupon:

- `@PointsStartDate>`*`date_format`*`@`: when points began to accrue.

- `@PointsExpirationDate>`*`date_format`*`@`: when points will expire.

- `@ActivationOrIssueDate>`*`date_format`*`@`: when the account was activated or issued.

- `@ValidUntilDate>`*`date_format`*`@`: when the account becomes invalid.

Use the following table to define the date format to be printed. The variables are case-sensitive.

Table 9-2   Date Formatting

Variable	Description	Example(s)
y	Year	`yyyy` = 2005
		`yy` = 05
M	Month	`MMMM` = September
		`MMM` = Sep
		`MM` = 09
w	Week in year (1–52)	`w` = 26
W	Week in month (1–4)	`W` = 2
D	Day in year (1–366)	`D` = 189
d	Day in month (1–31)	`d` = 18
F	Day of week in month	`F` = 2
E	Day of week	`EEEE` = Tuesday
		`EE` = Tue
a	AM/PM	`a` = AM
H	Hour of day (0–23)	`H` = 0
k	Hour of day (1–24)	`k` =24
K	Hour of day (0–11)	`K` = 0
h	Hour of day (1–12)	`h` = 12
m	Minutes	37
s	Seconds	55

For example:

- `@PointsStartDate>MMMM d, yyyy@` **outputs** `September 25, 2005`

- `@PointsStartDate>d MMM, 'yy@` **outputs** `25 Sep, '05`

- `@PointsStartDate>MMMM d, yyyy, at h:mm a@` **outputs** `September 25, 2005, at 9:30 AM`

- `@PointsStartDate>Fnd EEE in MMMM@` **outputs** `2nd Tuesday in September`

Customer Information Print Tokens

You can use print tokens to show information specific to the customer registered to the program account. For example, if you add the following line to a chit:

`Thank you for visiting, @CustomerName@!`

Then for a customer named John, the chit prints:

`Thank you for visiting, John!`

Customer information may not be registered to the account. For example, while Gift and Loyalty creates an account when issuing a card, it may not require customer information to be entered at the workstation, and the account may not require customer information before usage. The system can also take one or more days to process information entered in myicard.net. To avoid printing lines with empty values, use the `@CustomerExists@` token to check for customer information before printing text. For example, if you add the following lines to a chit:

`@CustomerExists@Thank you for visiting, @CustomerName@!`
`@CustomerExists@`

`See you again soon!`

When the account used in the transaction contains customer information for John, the chit prints:

`Thank you for visiting, John!`

`See you again soon!`

When the account used in the transaction does not contain customer information, the chit prints:

`See you again soon!`

The following print tokens can be used to show customer information:

- `@CustomerName@`

- `@CustomerFirstName@`

- `@CustomerLastName@`

- `@CustomerAddressLine1@`

- `@CustomerAddressLine2@`

- `@CustomerEmailAddress@`

- `@CustomerCity@`

- `@CustomerState@`

- `@CustomerHomePhoneNumber@`

- `@CustomerPostalCode@`

- `@CustomerCountry@`

- `@CustomerFriendlyProgramName@`

- `@CustomerPOSTextMessage@`

Print Directives

Print directives as described in the following table directly modify printer behavior while printing the chit or receipt:

Intended Behavior	Print Directive	Description and Example
Perform a full cut.	`%CUT%`	Printers with autocut functionality perform a full cut on the receipt paper at the `%CUT%` directive. This directive does not allow for partial cuts or perforations.
		For example, for transactions that issue a coupon, you can use the directive to cut the receipt and then print the coupon on a separate sheet.
Use double-wide characters.	`%DWON%` `%DWOFF%`	Printers use double-wide characters, or boldface type for roll printers, for text starting with the `%DWON%` directive.
		New lines default to the normal font type. Use `%DWOFF%` to return to using the normal font type before the end of a line.
		For example, you can configure the account number to print in double-wide characters: `%DWON%ACCNT# @AccountNumber@`
Use red ink.	`%RON%` `%ROFF%`	Roll printers with a two-color ribbon use red ink for text starting with the `%RON%` directive. Thermal printers without color printing print text in inverse.
		New lines default to the normal font type. Use `%ROFF%` to return to using default ink color before the end of a line.
		For example, you can configure the points total to print in red ink for visibility: `Points: %RON%@PointsBalance@%ROFF%` causes the receipt to print `Points:` in regular ink and the point balance in red ink.
Center text horizontally.	`%C%`	Printers center text horizontally for lines that begin with `%C%`.

Database Synchronization Jobs

Schedule database synchronization jobs to transfer information from the Enterprise Back Office database to the Gift and Loyalty database. These jobs can be required to

let certain configurations or functionality, such as round-robin loyalty programs, to act upon the most up-to-date information in the system.

Standard or Required Sync Jobs

- **Sync iCare Programs with Customer Activity**: Run once to synchronize Gift and Loyalty programs with the customer activity database.

- **Initialize YTD Total**: Run once to initialize the calculation of Year-to-Date totals.

- **Sync iCare Transactions with LocAct**: Run once daily after Point-of-Sale End of Day operations.

- **Sync iCare Customers with LocAct**: Run once daily after Point-of-Sale End of Day operations.

- **Sync New iCare Customers with Customer Activity**: Run once daily after Point-of-Sale End of Day operations.

- **Sync LocAct CustAct**: Run once daily after Point-of-Sale End of Day operations.

- **Sync AGGREGATE_TRANSACTIONS**: Run once daily after Point-of-Sale End of Day operations.

- **Sync Organizations**: Run once when the organization is created.

- **Sync Org Levels**: Run once when the organization is created, and run every time an organization level is added.

- **Sync RTA Org Levels**: Run once when the organization is created, and run every time an organization level is added in the DOWNLOAD organization.

- **Sync Locations and Org Levels**: Run once when the organization is created, and run every time an organization level or location is added.

- **Sync Locations**: Run once when the organization is created, and run every time a location is added.

- **Sync Revenue Centers**: Run once daily after Point-of-Sale End of Day operations.

- **Sync CA Locations**: Run once daily after Point-of-Sale End of Day operations.

Sync Jobs for Program or Rule Configurations

- **Expire Points**: For any site using expiring loyalty points, schedule based on the loyalty program.

- **Reset MTD Total**: For any site using Month-to-Date totals, schedule on the first or last day of each month.

- **Reset YTD Total**: For any site using Year-to-Date totals, schedule on the first day of the year if the organization is using calendar years to calculate balances, or schedule daily if the organization is set to a year based on the initial transaction.

- **Expire Gift or Debit Accounts**: For any site using expiring gift or debit accounts, schedule based on the applicable program.

- **Expire Loyalty Accounts**: For any site using expiring loyalty accounts, schedule based on the loyalty program.

- **Reset Credit Accounts**: For each credit card program that must be reset, schedule based on site requirements to reset accounts to a 0-dollar balance.

- **Limit and Reload Debit Accounts**: For programs that reload with a stored value, schedule based on site requirements for reloading cards or accounts.

- **Expire Partner Links**: Schedule as needed to expire partner links.

- **Unique Items Sync**: Schedule as needed to synchronize unique items.

- **Sync All Configuration**: Schedule as needed to troubleshoot synchronization issues. Do not use this sync job when you are not troubleshooting.

- **Sync Major Group Masters**: Run daily for programs that use major groups to identify item eligibility.

- **Sync Major Groups**: Run daily for programs that use major groups to identify item eligibility.

- **Sync Family Group Masters**: Run daily for programs that use family groups to identify item eligibility.

- **Sync Family Groups**: Run daily for programs that use family groups to identify item eligibility.

- **Sync Menu Item Masters**: Run daily for programs that use menu items to identify item eligibility.

- **Sync Menu Items**: Run daily for programs that use menu items to identify item eligibility.

Scheduling Database Synchronization

1. In Reporting and Analytics, click **Initial iCare GPL Setup and Configuration**, and then click **DB Sync Schedule** in the **iCare Gifts, Payments and Loyalty** portlet. If you cannot find the link, contact your system administrator.

2. Click **Add**, or select an existing scheduled sync job and click **Edit**.

3. Select the **Sync Type** to schedule. Database Synchronization Jobs and individual program configuration instructions contain more information about the sync types that you need to schedule.

4. Enter the name of the Gift and Loyalty server in **Server Name**. The database synchronization will not execute if this entry is incorrect.

   If you do not know the server name, contact your system administrator or Oracle account representative.

5. Select **Sync Now** to run the synchronization job immediately after saving changes.

6. Use the **Sync Time**, **Sync Time Zone**, and **Sync Frequency** fields to configure when Gift and Loyalty queues the synchronization job and at what recurrence frequency. Unless otherwise specified, you should schedule daily sync jobs to run after the Point-of-Sale End of Day operations. If you do not know when the End-of-Day operations complete at the Point-of-Sale, Oracle MICROS recommends scheduling sync jobs between 4:00 AM and 7:00 AM.

   If you select the frequency **Specific Day(s) of Week**, select or deselect the days that Gift and Loyalty queues the synchronization job.

7. Leave **Other Options** blank, or enter the program code if you are configuring one of the following sync jobs:

   - Limit and Reload Debit Accounts

   - Reset Credit Programs

   - Expire Gift or Debit Accounts

- Expire Points

8. Click **Save**.