

Oracle CLOUD Gift Card & Loyalty (Standard & Advanced)

(formerly iCare) Customer Relationship Management Solution

Cloud Loyalty (formerly iCare) is an enterprise-wide Customer Relationship Management solution for mymicros.net customers. It provides customer analysis reporting and loyalty/reward capabilities. Cloud Gift Card (formerly iCard), a component of iCare, offers stored value card (gift cards), payment cards (house credit cards), and loyalty card functionality. Like mymicros.net, iCare is hosted by ORACLE HOSPITALITY and can be purchased as Cloud subscription service.



Oracle Hospitality

iCare Customer Database

The customer database created and maintained by iCare stores a complete transaction history for every customer, including the customer's location, service type, date and time, guest count, and total spend. The record can also include specific menu items purchased in each transaction. This allows the iCare user to generate two different types of reports **with mymicros.net**:

- **Specific reports** track the activity of an individual customer: their visits, amount spent, buying habits, etc.
- **Aggregate reports** track the activity of a group of customers, and return the transaction patterns of the group as a whole. This group may be the entire customer base, or specific groups within it, such as members of a guest loyalty program.

Customer records can be created and maintained in the iCare database in any of several ways:

- Manual entry by a privileged user,
- Uploads from third party application files, or
- On-the-fly: automatic creation at time of transaction

Customers can be identified by any of several unique identifying fields:

- Loyalty or program number assigned by the enterprise
- Reservation number
- Phone number
- Credit card number

For a transaction identified only by credit card number, a record is created for an "anonymous" customer—the cardholder name is not passed from the POS to iCare. The actual credit card number is encrypted in the database and masked in the application, to comply with PCI requirements. The data accrued from anonymous transactions can be useful for aggregate reports (e.g., what is the average spend at lunch?), but cannot be used to link to specific customers.

Customer Program Summary Report							
Totals:	Customers	# Checks	%	Total Spend	%	Avg Check	Repeat Visits
All Checks		47,126		844,030.29		17.91	
CCARD	17,698	19,147	41%	497,844.65	59%	26.00	By Location By Day Part
rewards	683	843	2%	16,640.34	2%	19.74	By Location By Day Part
Location	Customers	# Checks	%	Total Spend	%	Avg Check	
Atlanta		4,468		79,709.66		17.84	
CCARD	2,009	2,144	48%	54,614.72	69%	25.47	
Boston		2					
rewards	357						
CCARD	626						
Buffalo							
CCARD	1,302						
Chicago							
CCARD	1,001						

Customer Activity Top 100 by Visits Report									
Customer	Ref Num	Program	Start Date	Last Date	# Guests	Avg	# Trans	Avg	Total
New Customer	XXXX-9395	CCARD	10/11/2003	10/21/2003	12	1.00	12	15.50	186.00
New Customer	XXXX-0809	CCARD	1/1/2003	10/21/2003	14	1.27	11	11.38	123.00
New Customer	XXXX-3406	CCARD	1/30/2003	10/21/2003	16	2.00	8	22.78	182.22
New Customer	XXXX-4094	CCARD	1/15/2003	10/20/2003	8	1.00	8	17.72	141.79
New Customer	XXXX-1030	CCARD	12/23/2002	10/21/2003	11	1.38	8	15.88	127.00
New Customer	XXXX-5299	CCARD	12/30/2002	10/21/2003	15	2.14	7	24.66	172.60
New Customer	1000109590	rewards	7/16/2003	10/22/2003	14	2.00	7	8.15	57.04
MILLER/DOLLY E	1000065586	rewards	6/19/2003	10/22/2003	7	1.00	7	7.11	49.74

*** Note: Reports Shown above are only available with CLOUD Reporting & Analytics subscription.**

CLOUD Reporting & Analytics is now REQUIRED when ordering CLOUD Gift & Loyalty.

Gift Card (formerly iCard)

iCard allows an enterprise to create and manage guest payment and loyalty card programs. A restaurant customer can belong to one or more programs or hold multiple accounts in the enterprise, and the restaurant customer can use a single card to participate in all of them. iCard offers many feature and program options for both Stored Value/Payment Cards, and for Loyalty Cards.

Gift Card, Debit Card, Payment Card

iCard can be issued as a Stored Value Card (gift or debit cards) or a Payment Card (like a house credit card). ORACLE HOSPITALITY POS systems can be used to sell, reload, redeem, and cash out cards.

Gift/Debit Use

iCard allows the operation to issue and maintain traditional stored value cards (a.k.a. gift cards). In a debit program, cards are purchased in advance by the restaurant customer, loaded with a specific amount of purchasing power, and then used to make purchases.

Credit/Payment Use

iCard also supports credit programs or payment cards. In a credit program, a restaurant customer uses the card to make purchases, and iCard keeps track of the amount due. The enterprise can use their existing A/R processes to invoice the restaurant customer at the end of each billing cycle. Many of the program types and options that are available for debit cards are available for credit programs as well.

Card Programs	Supported for	
	Credit	Debit
Gift Cards	n/a	Yes
Employee Meal Cards	Yes	
Management or house accounts (billed to internal corporate departments)		
Corporate cards (billed to external organizations)		

Card Options	Supported for	
	Credit	Debit
Assign preset amounts, which can be activated and issued at the point of sale	n/a	Yes
Award a bonus for each card issuance and/or reload		
Limit cash-outs		
Manage inactive card accounts with expiration and usage rules		
Set purchase (credit) limits by day or day part	Yes	
Require authorization for redemptions		
Support multiple currencies, and currency conversion		
Restrict eligibility to specific menu items (e.g., no alcohol)		

See Page 7 for details on the **Standard version** of CLOUD Gift Card & Loyalty (a value-priced program that includes ONE Gift Card and ONE Loyalty program, available to ORACLE HOSPITALITY e7 and RES (1-9 Ws) sites).

Unlike the **Advanced version** offering, the **Standard version** has pre-defined and pre-configured choices available.

Gift Card (iCard) Administration and Reconciliation

mymicros.net is used for iCard configuration, administration, and reporting.

iCare Accounts Summary					
Program Name	Code	Type	Status	Count	Balance
Frequent Diner Club	FDC	Loyalty		2,648	3,022.00
			Active	2,648	3,022.00
Gift Cards	GIFT	Gift Card		3,660	61,305.11
			Active	814	1,850.11
			Newly Active	2,815	59,455.00
			Inactive Reversed	31	0.00

iCare Program Summary					
Program Name	Type	Currency	Net Amount	Points	Transactions
All Programs:			6,148.94	341	474
Frequent Diner Club	Loyalty	USD	7,077.53	341	363 <small>New Accts</small>
Gift Cards	Gift Card	USD	(928.59)		111 <small>New Accts</small>

Program Activity Summary by Location														
Program Transactions											Reset Transactions			
Location	Qty	Issues Total	Qty	Redeems Total	Qty	Reloads Total	Qty	Cashout Total	Net Total	Qty	Issues Total	Qty	Reloads Total	Card Not Present
Gift Cards:	27	435.00	84	(1,363.59)	0	0.00	0	0.00	(928.59)	0	0.00	0	0.00	16
Atlanta	4	85.00	5	(77.55)	0	0.00	0	0.00	7.45	0	0.00	0	0.00	4
Boston	0	0.00	5	(65.26)	0	0.00	0	0.00	(65.26)	0	0.00	0	0.00	1
Buffalo	5	80.00	5	(85.51)	0	0.00	0	0.00	(5.51)	0	0.00	0	0.00	1

Program Activity Detail													
Business Date	Time	Account	Check	Category	Card Not Reset	Card Present	Reversal	Terminal	POS	Emp Num	Points	Amount	New Balance
Gift Cards:													
Portland													
10/21/2003	10:35 AM	0909502500015373	8308	REDEEM	Y					1	901	0 (4.94)	20.06
10/21/2003	11:03 AM	0909502500067342	8317	REDEEM						3	154	0 (25.00)	0.00
10/21/2003	1:12 PM	0909502500020676	8377	REDEEM						3	263	0 (20.21)	4.79
10/21/2003	1:30 PM	0909502500029379	8401	REDEEM						1	106	0 (12.06)	12.94
10/21/2003	1:31 PM	0909501000103722	8407	REDEEM						3	179	0 (10.00)	0.00
10/21/2003	1:32 PM	0909502500067319	8410	REDEEM						2	178	0 (17.34)	7.66
10/21/2003	2:25 PM	0909502500066045	8451	REDEEM						2	178	0 (14.71)	10.29
10/21/2003	2:53 PM	0909502500029620	8979	ISSUE						1	801	0 25.00	25.00
10/21/2003	2:53 PM	0909502500029619	8979	ISSUE						1	801	0 25.00	25.00
10/21/2003	3:05 PM	0909501000103175	8463	REDEEM						3	109	0 (10.00)	0.00
10/21/2003	4:35 PM	0909502500012836	8480	REDEEM						3	109	0 (2.00)	23.00
10/21/2003	4:36 PM	0909502500012836	8480	REDEEM						3	109	0 (23.00)	0.00

***Note:** Check level drill-down is only available with CLOUD Reporting & Analytics subscription.

CLOUD Reporting & Analytics is now REQUIRED when ordering CLOUD Gift & Loyalty.

Loyalty and Promotions (formerly iCare)

Customers can use iCard's flexible loyalty programs to create a loyalty card tailored to their specific needs. A loyalty card accrues value each time it is used for a transaction. The points may be given a user-defined name such as "points" or "visits". Points accrued by a guest loyalty card are stored in the customer's record in the iCare database. Point balances are printed on a separate chit at the POS after each transaction. Various administration reports are available in mymicros.net that show each account's balance. Guests may review their point balances and transaction details at a web site created specifically for this purpose: www.myicard.net

Options for Accruing Currency on a Loyalty Card

A flexible rules engine controls how points are earned. Rules are available to control:

- The number of points per visit (e.g., 1 point per visit, 10 points per visit, etc.)
- The number of points per currency unit spent (e.g. 1 point per \$, etc.)
- Points based on specific menu items
- Points based on new menu items purchased this period
- Bonus points for specific menu items
- Bonus points for when the transaction occurs.
- Points for birthday or anniversary purchases

The currency can be redeemed for many types of rewards programs. The rules may be different by store, region, or area.

The flexible expiration rules engine controls when points expire:

- Never
- Aging based on a defined period
- Rolling periods

Options for Loyalty Card Awards

iCare includes a flexible awards engine to control when and how awards are issued to guests:

- Immediate discounts may be issued when the point balance reaches a certain threshold.
- Serialized coupons may be issued when the point balance reaches a certain threshold.
- A currency value may be credited to the stored value account on the same card. This "award" account may be used like a gift card, so that the guest may pay guest checks.
- Program uplifts to move a guest from a "Silver" program, to a "Gold" program.
- Awards may be controlled based on time of day or day of week.
- Awards may be configured to be issued only once (such as a birthday or anniversary award).

The POS actions such as discounts and tenders, and chit printing are all controlled centrally so it is very easy to change programs. Once an applicable range of menu items, discounts, service charges and tenders have been allocated on the POS, all other changes are made centrally and require no additional POS changes.

The iCare program may be integrated with the mymicros.net solution to provide transactional reporting.

CLOUD Reporting & Analytics is now REQUIRED when ordering CLOUD Gift & Loyalty.

An enterprise can allow its restaurant customers to use a customer-facing web site to check balances on Stored Value, Payment, or Loyalty cards. Restaurant customers logged in to www.mycard.net can also deactivate a lost or stolen card, and request a replacement card (the value is stored in the iCare database, not recorded on the card itself.)

The screenshots show the following components of the www.mycard.net website:

- Login Page:** Features the www.mycard.net logo, an **iCard** logo, and a form to enter a card number with a **GO** button.
- Welcome Page:** Displays a **Welcome!** message and lists enrolled programs. It includes a link for [FD Club](#) with 4 visit(s) and a [Register Profile](#) link for new users.
- Transaction History:** A table titled **FD Club* - Transactions** showing the last transaction displayed first.

Description	Location	Transaction Date	Points	Bonus Points	Balance
Restaurant Chk:7683	Columbia	10:10 AM Tue Oct 21, 2003	1	0	4
Restaurant Chk:5648	Columbia	7:12 PM Sat Oct 18, 2003	1	0	3
Restaurant Chk:3898	Columbia	8:11 AM Wed Oct 15, 2003	1	0	2
Restaurant Chk:3588	C				
- Profile Form:** A registration form with fields for First Name, Last Name, Address Line 1, Address Line 2, City, State/Region, Postal Code, County, Country, Home Phone, Work Phone, Email Address, Mobile Phone, and Birthday (mm/dd/yyyy). Fields marked with (*) are required. Buttons for **Submit Profile** and **Clear** are provided.

Customers can use the site to enter information for a new customer profile, or to change information on an existing profile. Existing information cannot be viewed. To insure confidentiality, no customer information is displayed at this web site.

Gift & Loyalty Reporting

Available Cloud Gift & Loyalty (iCare) Reports with Cloud Reporting & Analytics (mymicros.net)

With mymicros.net, check level detail reporting is available.

<u>Report</u>	<u>Description</u>
Customer Listing	Shows a listing of all Customer Program participants
Customer Program	Shows a summary of Customer Program activity
Customer Visits	Shows customers who have visited 1, 2-3, or 4+ times
New Customers	Shows new customer activity by program
Program Sales by Emp	Shows checks rung under programs by each employee
Top 100 Customers	Shows top 100 customers by total visits or expenditure
Awards Audit Summary	Shows high levels of point issues and awards by employee
Outstanding Balance	Shows point balance as of last transaction
Program Accounts	Shows a listing of accounts by program
Program Activity	Shows awards, gift card & loyalty program activity
SV Expiration	Shows stored values about to expire by month
Loc Reconciliation	Shows gift card issues and redemptions by location

Available iCare Reports without Cloud Reporting & Analytics (mymicros.net)

Without mymicros.net, only iCare transactional data is available. No check level detail, or POS summary level, reporting is available.

<u>Report</u>	<u>Description</u>
Awards Audit Summary	Shows high levels of point issues and awards by employee
Outstanding Balance	Shows point balance as of last transaction
Program Accounts	Shows a listing of accounts by program
Program Activity	Shows awards, gift card & loyalty program activity
SV Expiration	Shows stored values about to expire by month
Loc Reconciliation	Shows gift card issues and redemptions by location

Order With or Without Cloud Reporting & Analytics (mymicros.net)

Cloud Gift & Loyalty (iCare) ordered with Cloud Reporting & Analytics (mymicros.net) allows iCare applications to take advantage of all mymicros portal business intelligence tools that include:

- Additional Reporting
- Audit & Analysis
- iQuery

These tools allow an iCare customer to:

- Drill down to the transaction detail on individual guest checks
- Configure iCare programs that are linked to specific menu items or groups of menu items
- Benchmark iCare programs against anonymous credit card programs

Customers previously ordering iCare without Cloud Reporting& Analytics (mymicros.net) were limited to iCare account transaction reporting only (not to be confused with POS transactions). Access to check level detail was not allowed and specialized reporting tools, such as Audit & Analysis and iQuery, were not available. Also, the operational reporting for sales, labor, management control, etc. was not available. Oracle now requires Cloud Reporting& Analytics when ordering Cloud Gift & Loyalty (iCare)

Other Information

Database Management, Data Transmission and Storage Security, Service Levels, Purchase Plans and Ordering Information are identical to mymicros.net. ORACLE HOSPITALITY maintains a permanent demonstration site, requiring specific card numbers available through the distribution channel, at <http://demo.mycard.net>

Cloud Gift Card & Loyalty STANDARD version (formerly iCare-ES)

*Now available as a value-priced program that includes ONE Gift Card and ONE Loyalty program, for ORACLE HOSPITALITY e7 and RES (1-9 Ws) sites.

Unlike the Advanced Cloud Gift Card & Loyalty offering, the Standard version is a pre-defined and pre-configured program that includes the configuration of both:

- **One (1) basic Stored Value program** (Gift Card)
- ...and...
- **One (1) basic Loyalty program**
- ...available to ORACLE HOSPITALITY e7 (with back-office PC) and RES (1-9 Ws, with SIM/SVC licensing) sites.

Standard version (formerly iCare-ES) **Stored Value** (Gift Card) Program -- Includes ONE basic Gift Card Program using iCards, with partial redemption and reloadable options

Standard version (formerly iCare-ES) **Loyalty** Program – Includes ONE choice of either **Loyalty Option A** or **Loyalty Option B** described below:

	Loyalty Option A	Loyalty Option B
Point accumulation	Point issued per dollar spent	Point issued per visit
Threshold	Point threshold for award issue	Point threshold for award issue
Award	Stored value reward*	Stored value reward*

*Selecting a LOYALTY program that rewards a “spend amount” with a Gift Card as an Award— uses the (1) Gift Card choice

Example Program:

	Loyalty Program (option A)	
Point accumulation	Point issued per dollar spent	A point will be issued per dollar spent, when account reaches 100 a \$10 stored value award will be added to the loyalty card and program repeats.
Threshold	100	
Award	10	

The Gift Card and Loyalty program above are CLOUD subscription based models, which include License Subscription, Hosting Services, Upgrades (Software Update Licensing or SUL) and ORACLE HOSPITALITY Help Desk support. **CLOUD Reporting & Analytics is now REQUIRED when ordering CLOUD Gift & Loyalty.**

As of 12.21.15

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