

# Loyalty/Gift Card Quick Reference Guide

Published Date: November 15

## Introduction

This document outlines the Gift Card aspect of Maestro's Loyalty/Gift Card Management. The Guest Reservation ID uses of the Loyalty/Gift Cards will be discussed in a separate document. As of 4.18.55, the Loyalty side of Loyalty/Gift Cards is still currently under development.

Maestro will create an account that holds the pre-paid credit for all Gift Cards that are sold. The account can be identified with the swipe of the Loyalty/Gift Card. If holder of a card wants to settle a folio in Maestro (in FD, POS, SPA, etc) swiping a Loyalty/Gift Card will reduce the balance in the account that holds the pre-paid credit, and settle the folio.

The Loyalty/Gift Cards carry no financial information. They allow the clerk identify the holder and access a pre-paid account in Maestro. \

## Global Set-Up

The following Authorized Functions are required for users who will be able to manage Gift Cards:  
In Global>Clerk Group Security, add Authorized Functions

- AR9** (Allowed to maintain Loyalty/Gift cards)
- AR10** (Allowed to access Loyalty/Gift Card Lookup)
- AR11** (Allowed to Manually Enter Loyalty/Gift Card Number)
- AR12** (Allowed to check Loyalty/Gift Card balance)

## Loyalty/Gift Card Set-Up

In AR Maintenance >Setup>Loyalty/Gift Card Maintenance

*NOTE: If using Gift Card in a Multi Property setting, you have to duplicate your settings to use the same cards across Property. If you want specific cards for specific properties then you will need to have unique settings.*

Uniq Loyalty Id	1001
Sale Perm Client	32248
Sales Post Code	GCUR
Pending Perm Client	29413
Pend Post Code	GCU
Def. Expiry Days	365
High Amount	1,500.00
Client Text Popup	Y

- **Uniq Loyalty ID** – needs to be set-up based on the cards you have purchased. You will require Maestro Support for assistance with this setting.
- **Sale Perm Client** – The Perm Client # used for Card pre-payments and history



- **Sale Post Code** – The Posting Code used to offset the payment posting code

Seq	X	Date Eff	Post	Prop	Bld	Room	Voucher	Charges	Payments	Text
1		04/20/2007	GCUR	QL			TEST	12.00		
2		04/20/2007	CA	QL			TEST		12.00	

- **Pending Perm Client** – The Perm Client used to track the running total of Loyalty/Gift Card account
- **Pend Post Code** – The Posting Code used to mirror all Gift Card transactions. When reading this Perm Client’s folio, Negative values on this posting code represent pre-payments. Positive values represent usage of the card as a Settlement method.

7		04/20/2007	GCU	QL			TEST	-10.00		
8		04/20/2007	GCU	QL			TEST	-12.00		
9		04/20/2007	GCU	QL				222.00		
10		04/20/2007	GCU	CL				333.00		

- **Def. Expiry Days** – # of Days after Activation that Cards expire
- **High Amount** – The largest dollar value allowed
- **Client Text Popup** – Force the Client text to appear when swiping a card

### Loyalty Card Type Maintenance

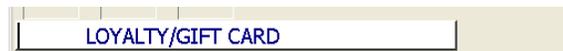
- **PostCode** – Select a code that you will use to post your Gift Card Redemption for.
- **Curr Cd** – Multiple currency is available with Gift Cards
- **PtsPer\$** – Future use

### Loyalty/Gift Card User Fields Maintenance

- Can be used for specific information required on a property level.

### Using Gift Card Management

Cards need to be **Activated** before the guest uses them. To activate a card based on assigned Authorized Functions go to either 1. Front Desk>Audit>Loyalty/Gift Card or 2. A/R>Main>Loyalty/Gift Card



#### To Activate a New Card:

Window>swipe card and hit Enter. Maestro will ask if you want to Activate the new card. Once the card is Active, the clerk can register the card. If not using a swipe system, you can go to the Window Menu and Manual Entry if you have the correct Authorized Function.

#### To Register a New Card:

The clerk is asked to fill in all mandatory fields on a Client Profile. This profile may be a new one or they look up and use an existing one. If the user were creating a new one, they would be required to fill in all mandatory fields.

#### To Load Money:

To load up money on a card, the clerk must enter the settlement type posting code and other information. This posting will be posted directly to the folio of the card. This will create the credit balance that allows the user to draw from. The clerk can enter multiple payments to allow the customer to load a card. There will be a limit to how much can be loaded on a card.

**LOST LOYALTY/GIFT CARD**

**To Replace a Card:**

The clerk is prompted for the client code (or use client lookup). The program then display the remaining money on them and show them in a list with outstanding \$ amounts. The user will then be able to select one and have it replaced. The original will be deactivated by having the \$ amount transferred to the new card.

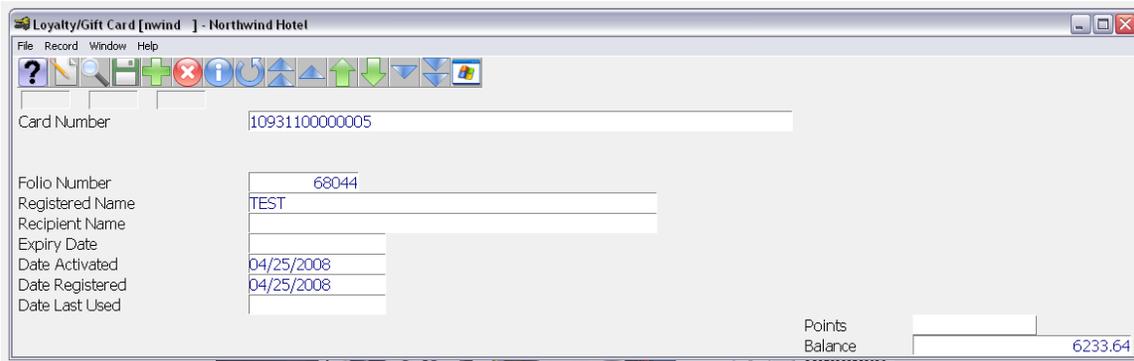
**LOYALTY/GIFT CARD HISTORY**

**To Display History:**

Display the details of the card's folio and allow the clerk to scroll through the list of history records.

Managing Loyalty/Gift Cards

**All Gift Card Management can be completed from the Loyalty/Gift Card screen.**



**To Load Cash:**

From the Loyalty/Gift Card Screen; Window>Load Cash and follow the previous instructions.

**To Check Transaction History:**

Different from Card History, we are able to view the transactions that have come off the card. From the Loyalty/Gift Card Screen; Window>History and you will be directed to the folio which tracks the Gift Card transactions. History, we are able to view the transactions that have come off the card. From the Loyalty/Gift Card Screen; Window>History and you will be directed to the folio which tracks the Gift Card transactions. You can also F5 on the Balance to get the same details.

**To Replace Card:**

From the Loyalty/Gift Card Screen; Window>Replace and follow the previous instructions.

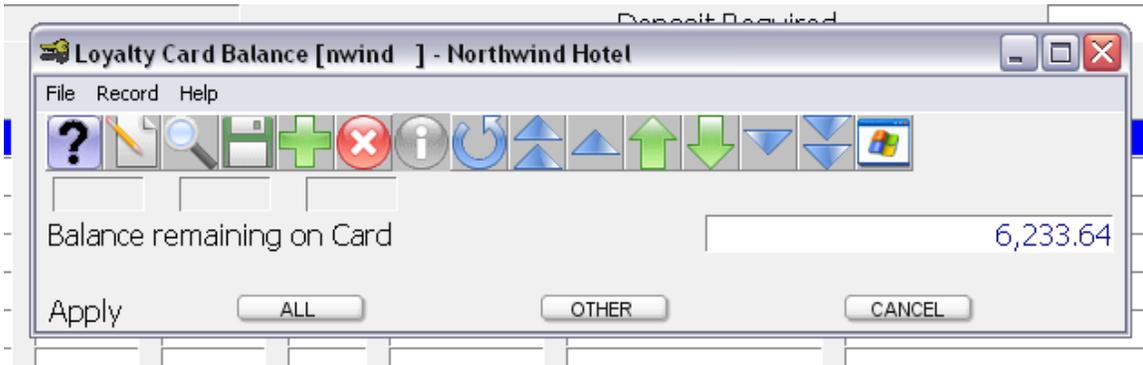
**Client Text:**

The Global Client Text can be added to a client from the Loyalty/Gift Card Screen; Window>Client Text

From the Maestro Folio (various modules)

**To Charge a Card:**

- Use your defined Gift Card settlement code as a posting (Same as you would for Cash, Check etc). When you use this code you will be prompted to swipe the card. Either swipe your Gift Card or go to Window>Manual Enter to enter the card manually.
- A window will pop up:



- **BE CAREFUL!!! If you press the ALL button, you will post all the Balance to the folio. Click Other to choose your amount.**
- When you Click Other you will go back to the folio and will be able to manually enter the value.

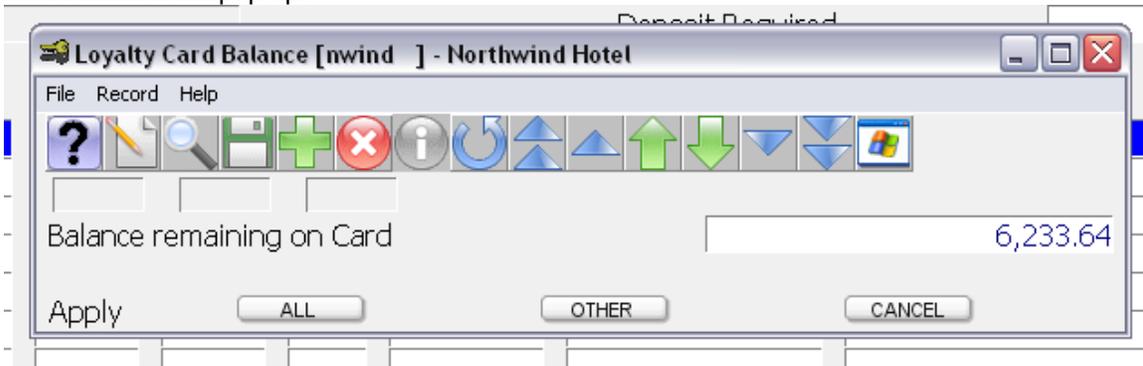
**To Verify Card Balance:**

- Go to Window>Check Gift Card Balance
- Either swipe your Gift Card or go to Window>Manual Enter to enter the card manually.
- You will be taken to the Loyalty/Gift Card screen.

Using Retail Point of Sale

**To Charge a Card:**

- In your Cash/Gift Card Settlement button you will have a choice for your Gift Card Settlement code. Select this code. Either swipe your Gift Card or go to Window>Manual Enter to enter the card manually.
- A window will pop up:



- **BE CAREFUL!!! If you press the ALL button, you will post all the Balance to the folio. Click Other to choose your amount.**



- When you Click Other you will go back to the folio and will be able to manually enter the value.
- Continue with the sale as normal.

**To Verify Card Balance:**

- From the POS Settlement Screen
- Go to Window>Check Gift Card Balance
- Either swipe your Gift Card or go to Window>Manual Enter to enter the card manually.
- You will be taken to the Loyalty/Gift Card screen.