Feature Focus Guide:
Givex Gift Cards

Core Product: [Product]
Last Updated: June 13, 2024

Contents

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Revision Record

Date	Version #	Description
Prior to 02/02/2023	QS v6.7+ EDC v6.7+	Supported Givex gift cards using NCR Aloha POS.
	QS/TS v12.3+	Updated the Givex Gift Card Feature Focus Guide to reflect CFC and new AM, and added the ability to support gift card activation and query
	QS/TS v15.1+	Added the ability to allow a guest to cash out a Givex gift card.
	QS/TS v19.6+	Increased the gift card digits to 24.
02/02/2023		Converted document to use new templates. Updated the front cover and back page to reflect new NCR branding.
06/12/2024		Updated document to reflect NCR Voyix branding.

About Givex gift cards

Givex Gift Cards Procedures at a Glance	
Core Product	Aloha Quick Service, Aloha Table Service, Aloha EDC
Complementary Products	No
Separate License Required?	Yes, you must license your security key for Aloha EDC (Credit Card + MX under Software Packages) and Custom EDC (under Software Options).
Other References	Aloha Quick Service Reference Guide, Aloha Quick Service Report Guide, Aloha EDC User Guide
Other Requirements	The Givex Aloha driver installed on each terminal requires routable Internet.

Givex gift cards make great gifts for any occasion; they make it easy and convenient for your customers, and offer a valuable marketing opportunity for your restaurant. Remaining card balances bring customers back, and increase average ticket size. Small amounts that are never redeemed become pure profit to your restaurant. At the same time, you can track each Givex gift card, and you have direct access to information, such as how many cards were used, the average value spent, when and where the cards were used, and more.

Givex gift cards are plastic, magnetic-striped cards that replace the old-fashioned paper gift certificates, and operate very similarly to credit cards. You can purchase them from the vendor with a predetermined value, such as $10.00, or as an open value card. An open value gift card lets the guest purchasing the card determine the value of the card. Once activated, each of these can have additional value added to them, if configured to do so.

When you are selling and redeeming Givex gift cards, the Aloha® Point-of-Sale (POS) system connects to the host for verification and authorization. If you are selling a new card, it is activated at this time. If you are redeeming a gift card, an immediate adjustment is made to the card balance at the host location. Therefore, with gift cards, you are able to maintain a higher level of control, security, and tracking capabilities.

Effective with Aloha POS v12.3 and EDC v12.3 and later, using a plug-in, you can now support the Givex gift card as a full service gift and loyalty card provider. This feature supports the following transactions:

- Activate card
- Add value
- Card balance

You must work with Givex to configure the GCM.ini file.

To support Givex gift cards, you must perform the following:

- Install the Givex Plug-In.
- Configure Givex/Private Label for Aloha EDC.

To accept 24-digit gift card numbers, you must update to the following:

- Aloha POS version to 19.6+.
- Aloha EDC to v19.4+.
- Givex plugin to v15.1.178+.

Although no configuration is necessary, you may need to access **Maintenance** > **Payments** > **Tenders** > **Identification** tab and update the Givex gift card number to 24-digits under the 'Identification' group bar.

Installing Givex gift cards

This section details the installation requirements for Givex Gift Cards. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Givex Gift Cards Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	Verify **prerequisites** are complete. See page 6.
2.	Install the **Givex UPI Plug-In**. See page 7.

Use the following procedure to install Aloha Givex.

> **Note**
> Givex provides the Givex Aloha driver, and the user name and password. Access Aloha Update to download the Givex UPI plug-in.

Givex requirements

There are requirements when using Givex gift cards.

- You must be on Aloha POS v12.3 and later.
- The terminals must be capable of sending traffic on port 50020 to the Internet.
- The terminals must have Service Pack 3 and C++ 2008; otherwise, the driver fails to install with error 1904.

Prerequisites: What you need to do before installing Givex

1. Install **EDC** v15.1 and later.

   If you use Aloha Manager, select Uses Electronic Draft Capture under the Products installed group bar on the Global tab in Maintenance > Business > Installed Products.

   If you use Aloha Configuration Center, select Uses Electronic Draft Capture under the Products installed group bar on the Global tab in Maintenance > Business > Global Administration.

2. Stop **EDC** before installing **Givex**.

3. Verify the following **EDC files** are in the BIN folder:

   AlohaUPI.Core.dll

   EdcSvr.UpiClient.Interop.dll

   Log4net.dll

4. Run **GivexUPISetup.msi** in the setup folder. Choose the install location same as the **EDC.exe** (%IBERDIR%/Aloha/BIN folder)

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The following files should be installed by setup in %IBERDIR%\BIN:

GivexAlohaUPI.dll

GCM.dll

GCM.ca

GCM.cert

GCM.ini

5. Copy **Plugin.cfg** from BIN folder to the same location as EDC.ini file (%IBERDIR%/Aloha/EDC folder).

Installing the Givex UPI plug-in

You must install the Givex UPI Plug-In prior to any configuration. Access alohaupdates.com to download this file. You need GivexUPISetup.msi, which installs all necessary files for the initial installation of Givex; the remaining files install through the Aloha POS system and Aloha Electronic Draft Capture.

1. Go to https://www.alohaupdates.com/RadiantUpdatePortal/SignIn.aspx?ReturnUrl=%2fRadiantUpdatePortal%2fDefault.aspx.

2. Select **NCR Customer** or **NCR Employee** as the type of user and click **Sign In**.

3. If prompted, enter your **user name** and **password** and click **LOG IN**.

4. Select **Download Install CD**.

5. Select **Givex** from the 'Application Suite' drop-down list, and select the **most current version of the plugin** from 'Major Version.'

6. Click **Download Now** and save **GivexUPISetup.msi** to a staging folder.

7. Continue to the **next procedure**.

Launching the Givex plug-in setup wizard

After downloading GivexUPISetup.msi, follow the prompts to complete installation.

1. Locate and launch **GivexUPISetup.msi**.
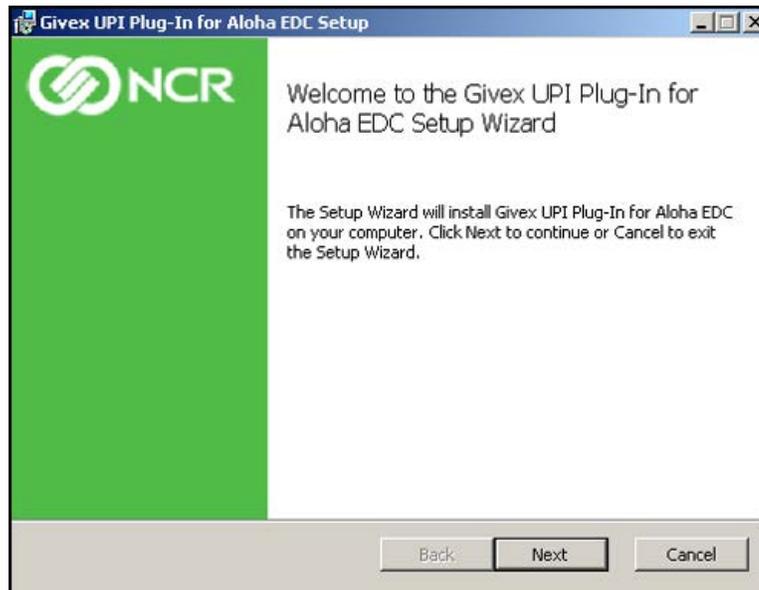
Figure 1 Givex UPI Setup Wizard

2. Click **Next**.The End-User License Agreement screen appears.
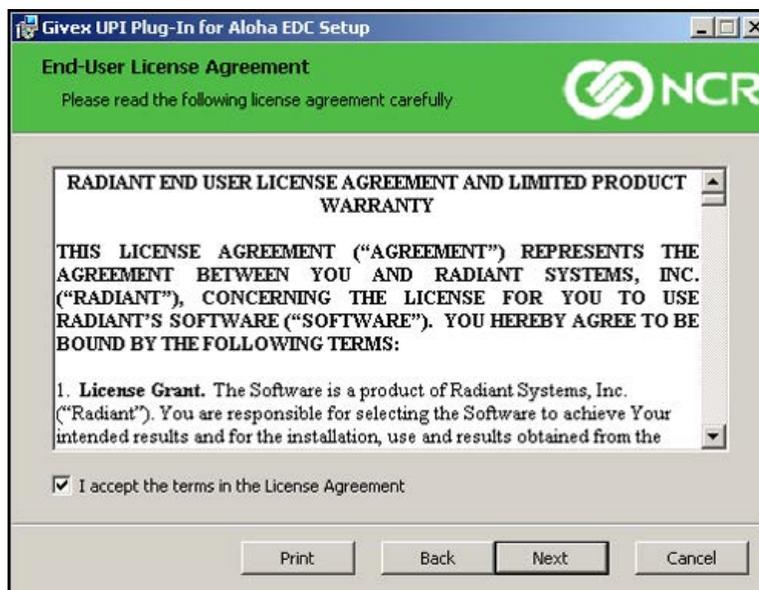
Figure 2 Accept End-User License Agreement

3. Select **I accept the terms in the License Agreement** and click **Next**. The Givex UPI Plug-In for Aloha EDC Setup screen appears.
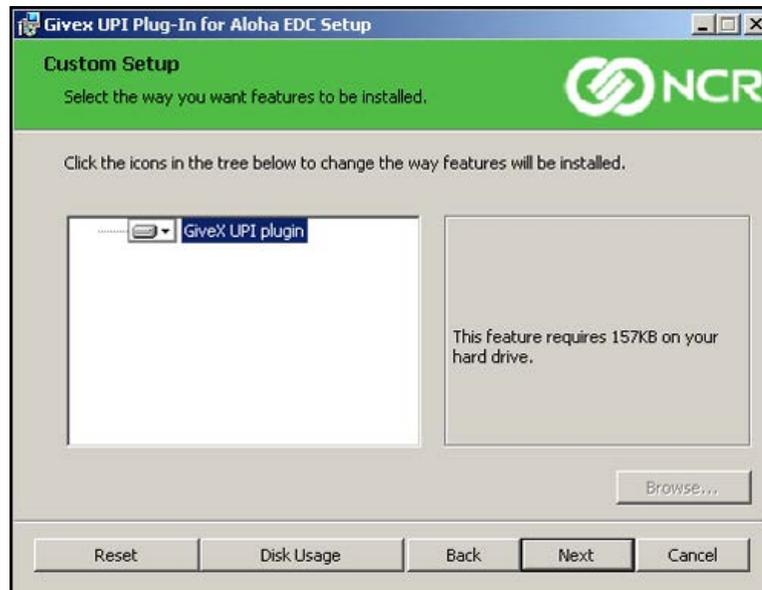
Figure 3 Givex UPI Plug-In for Aloha EDC Setup

4. Click **Next.**
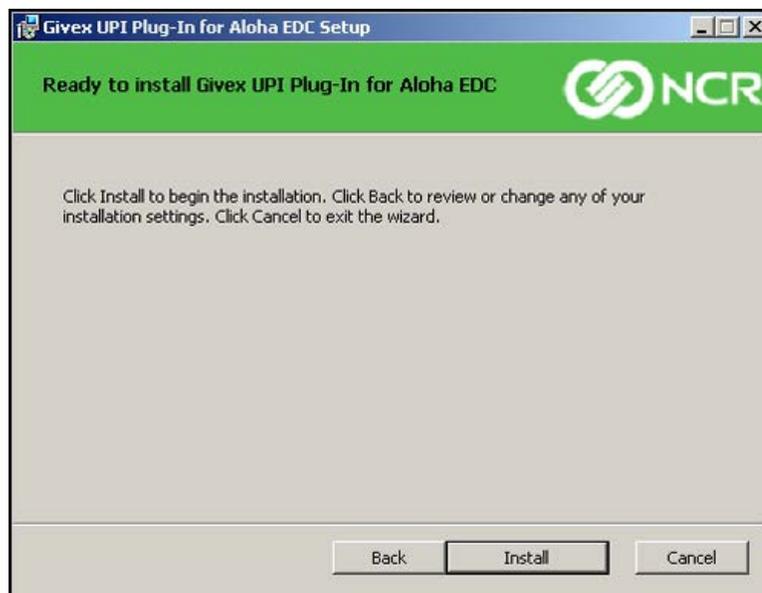
Figure 4 Ready to Install

5. Click **Install**. The Progress status bar screen appears.
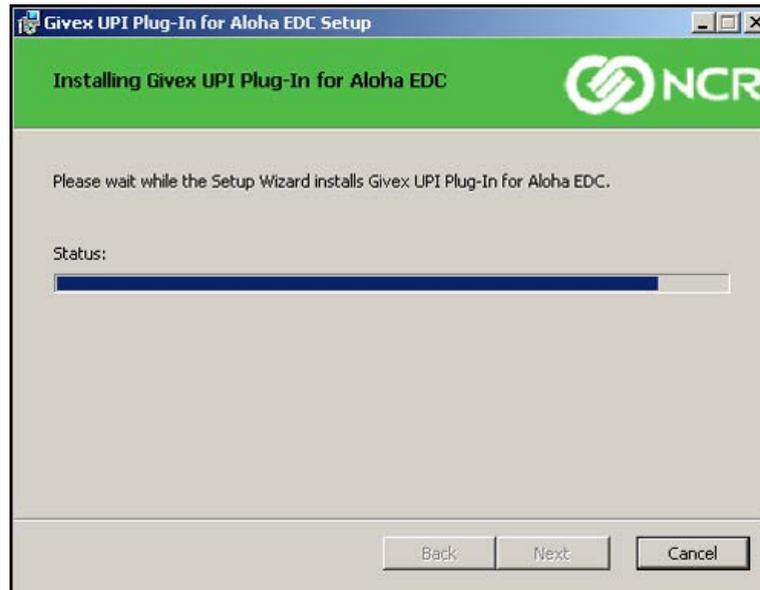
Figure 5 Installing the Givex UPI Plug-In for Aloha EDC

6. Allow the **installation** to continue.
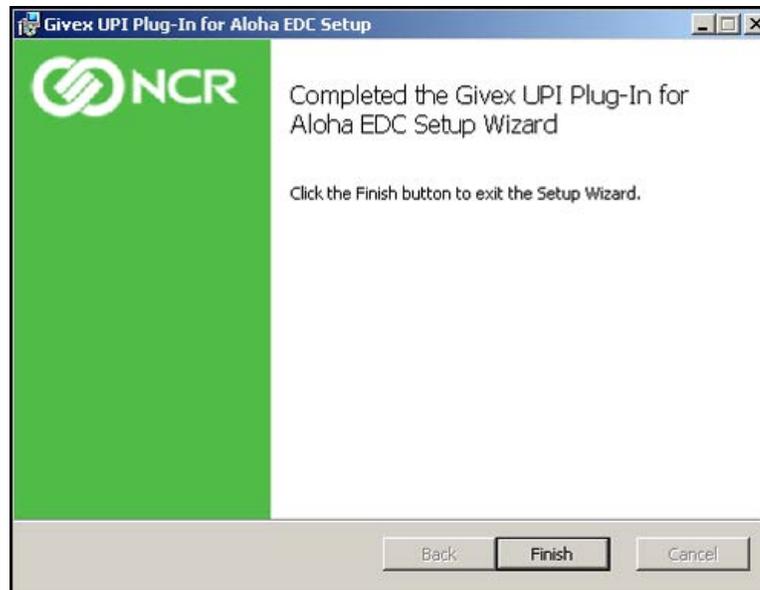
Figure 6 Installation Complete

7. Once the installation completes, click **Finish** to exit the Givex UPI Plug-In for Aloha EDC wizard.

A file called GCM.ini, located in the BIN folder, contains the connection parameters needed by the Givex driver to communicate with the Givex processor. You must configure the timeout, IP address, and IP port.

1. Navigate to the **%IberDir\BIN** folder.

2. Open **GCM.ini** using Notepad.

3. Edit the following **variables**, as shown below:

PRIMARY _MODE = 1

PRIMARY_TIMEOUT = 20 (Default)

PRIMARY_IP_ADDRESS = Enter the IP address provided by Givex. For example, 'dc-us1.givex.com.'

PRIMARY_IP_PORT = Enter the IP port provided by Givex. For example, '50019.'

PRIMARY_DIAL_COM =

PRIMARY_DIAL_BAUD =

PRIMARY_DIAL)INIT =

PRIMARY_DIAL_PHONE =

BACKUP_MODE = 1

BACKUP_TIMEOUT = 20

BACKUP_IP_ADDRESS = Enter the IP address provided by Givex. For example, 'dc-us1.givex.com.'

BACKUP_IP_PORT = Enter the IP port provided by Givex. For example, '50019.'

BACKUP_DIAL_COM =

BACKUP_DIAL_BAUD =

BACKUP_DIAL_INIT =

BACKUP_DIAL_PHONE =

If you are testing Givex, add the **variables** provided by Givex:

- [TEST_SECTION]
- TEST_PARAMETER = 1

4. Close and save the **file**.

Configuring Givex gift cards

This section details the configuration requirements within Aloha Manager and Aloha Configuration Center (CFC) for Givex Gift Cards. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Givex Gift Cards Procedures at a Glance:
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.
1. Access **Maintenance > Business > Store > Store Settings** tab **> Gift Card/Certificate Sales** group to configure the Givex gift card host. See page 14.
2. Access **Maintenance > Menu > Items** to configure items for selling Givex gift cards; one each for activation and adding value. To activate a Givex predefined amount gift card, see page 17. To add value to a Givex predefined amount gift card, see page 18. To activate a Givex open amount gift card, see page 20. To add value to a Givex open amount gift card, see page 22.
3. Access **Maintenance > Payments > Tenders** to configure a tender for applying payment with a Givex gift card. To configure the *Tender* tab, see page 24. To configure the *Type* tab, see page 27. To configure the *Authorization* tab, see page 28. To configure the *Printers* tab, see page 29.
4. Access **Maintenance > Electronic Draft Capture > Cards** to assign Givex to gift cards. See page 30.
5. Access **Maintenance > Screen Designer > Quick Service Screen Designer** or **Table Service Screen Designer** to add buttons for selling and redemption to the front-of-house (FOH). Quick Service: To add a predefined amount gift card button for activation in QS, see page 30. To add a predefined amount gift card button to add value in QS, see page 31. To add an open amount gift card button for activation in QS, see page 32. To add an open amount gift card button to add value in QS, see page 33. To add a Givex gift card redemption button in QS, see page 34. Table Service: To add a predefined amount gift card button for activation in TS, see page 36. To add a predefined amount gift card button to add value in TS, see page 37. To add an open amount gift card button for activation in TS, see page 38. To add an open amount gift card button to add value in TS, see page 39.

Givex Gift Cards Procedures at a Glance:	
6.	Access **Maintenance > Labor > Pos Access Levels** to allow an employee to cash out a Givex gift card. See page 40.
7.	Select **Utilities > Refresh POS & All Products** to refresh the data. See page 44.

Configuring Givex as the processor for gift cards

You configure Givex as the processor for your gift cards in Aloha EDC; however, you must stop EDC processing first.

To configure Givex:

1. Select **Maintenance > Electronic Draft Capture > Processor**.
2. Click the **New** drop-down arrow, select **Independent**, and click **OK**.

Figure 7 Electronic Draft Capture - Processor

3. Accept the **system assigned number** or click the **ellipsis button (...)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.
4. Under the 'Identification' group bar, type **Givex** to identify the processor.
5. Select **Active** to activate the processor.
6. Under the 'Independent' group bar, select **Givex** from the 'Plugin type' drop-down list.
7. Type **Givex** as the file name.
8. Click **Save** and exit the **Processor** function.

Configuring the Givex gift card host

The Aloha POS system offers you the ability to prevent theft and abuse of gift cards; you can prevent the activation or redemption of a gift card on the same business day on which the card was activated and prevent the redemption of a gift card more than once in the same business day, unless with manager approval. Determine what you will allow or prevent for gift cards in Store Settings > Gift Card/Certificate Sales.

To configure the Givex gift card host:

1. Select **Maintenance > Business > Store**.
2. Select the **Store Settings** tab.
3. Select the **Gift Card/Certificate Sales** group located at the bottom of the screen.

> 📝 **Note**
>
> If the Gift Card/Certificate Sales group is not available, you must access **Maintenance** > **Business** > **Additional Features** and select 'Display gift card.' Or if using Aloha Configuration Center, log in as a corporate user and access **Maintenance** > **Business** > **Corporate Administration**. Log out and then log back in.

Figure 8 Store Settings Tab - Gift Card/Certificate Provider Group

4. Under the 'Gift sales' group bar, select **Private Label** from the 'Gift card/Certificate provider' drop-down list.

5. Under the 'Printing properties' group bar, select **Show last 4 digits on all vouchers** to determine the portion of the gift card number to print on the voucher.

6. Under the 'Printing properties > Voucher' group bar, select **Print guest check message** if you want a message to appear on the check.

7. Under the 'Restrictions' group bar, select **Cannot redeem same gift card twice in a day** to prevent the redemption of the same gift card more than once in the same business day.

8. Select **Cannot activate and redeem gift card on same day** to prevent the redemption of a gift card on the same business day on which the card is activated.

> 📝 **Note**
>
> To provide the ability to override these restrictions, select the appropriate access level in **Maintenance** > **Labor** > **Pos Access Levels** > **Access Level** tab and select 'Override gift card restrictions' under the 'Financial' group bar.

9. Select **Allow refund transactions for activations and reload** to allow you to perform a refund for a customer who wishes to return a private label gift card they have purchased or remove additional funds loaded on their private label gift card.

> 📝 **Note**
>
> You must select Private Label from the 'Gift card/certificate provider' drop-down list to enable this option. The system supports this functionality for Givex private label gift cards only.

10. Select **Restrict multiple redemptions of the same gift card on a single check** to prevent an employee from applying payments from the same gift card in increments to the same guest check. For example, you have a $20.00 check. With this feature selected, the employee must apply the entire card to the amount; not in $5.00 increments.

11. Select **Restrict multiple add values of the same gift card on a single check** to prevent an employee from adding multiple values to the same gift card on the same guest check.

12. Select **Restrict activation of gift card until tendered** to prevent the activation or reloading of a gift card until you receive payment and the guest check has a $0.00 balance. If activation or reload fails, the Aloha POS system sends an immediate reversal to the guest check, preventing over-payment.

13. Click **Save** and exit the **Store** function.

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Configure items for selling Givex gift cards

You must configure items for selling Givex gift cards. Typically, you configure an item to sell the gift card and an item to add value to a gift card. If you sell gift cards with a predefined amount, create two items for each; one for activating and the other for adding value to the card.

To activate a Givex predefined amount gift card:

1. Select **Maintenance > Menu > Items**.
2. Click the **New** drop-down arrow, select **Gift card** from the 'Type' list box, and click **OK**.
3. Accept the **system assigned number** or click the **ellipsis button (…)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.

> 📝 **Note**
> Make note of the item number; you will need it later.

Figure 9 Item Tab - Activate Predefined Gift Card

4. Under the 'Settings' group bar, type a **Short name**, such as '$10 GC Act.'
5. Type a **Chit name**, such as '$10 GC Act.'

6. Type a **Long name**, such as '$10 GC Activate.'

7. Select **Activate card** as the 'Gift card action' to activate the card upon approval.

8. Leave **None** as the 'Tax group.' Generally, gift cards are not taxable items.

9. Select the **Sales/retail category**, such as 'Retail'

10. Select the **Pricing** tab.
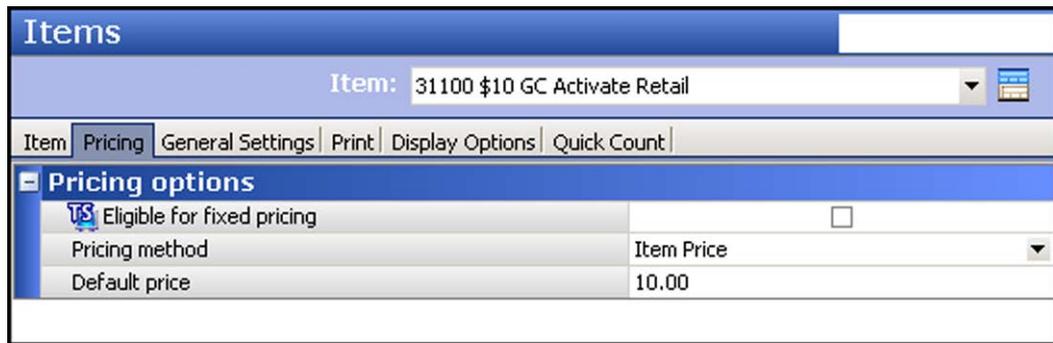
Figure 10 Pricing Tab - Activate Predefined Gift Card

11. Select **Item Price** as the pricing method.

12. Type the **default price**.

13. Click **Save** and continue to the **next procedure**.

To add value to a predefined amount gift card:

1. While still in the **Items** function, click the **New** drop-down arrow, select **Gift card** from the 'Type' list box, and click **OK**.

2. Accept the **system assigned number** or click the **ellipsis button (…)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.

Figure 11 Item Tab - Add Value Predefined Amount Gift Card

3. Under the 'Settings' group bar, type a **Short name**, such as '$10 GC Add.'

4. Type a **Chit name**, such as '$10 GC Add.'

5. Type a **Long name**, such as '$10 GC Add Value.'

6. Select **Add value** as the 'Gift card action' to activate the card upon approval.

7. Leave **None** as the 'Tax group.' Generally, gift cards are not taxable items.

8. Select the **Sales/retail category**, such as 'Retail'

9. Select the **Pricing** tab.

Figure 12 Pricing Tab - Add Value Predefined Amount Gift Card - Pricing Tab

10. Select **Item Price** as the pricing method.

11. Type the **default price**.

12. Click **Save** and continue to the **next procedure**.

To activate an open amount gift card:

1. While still in the **Items** function, click the **New** drop-down arrow, select **Gift card** from the 'Type' list box, and click **OK**.

2. Accept the **system assigned number** or click the **ellipsis button (…)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.

Figure 13 Item Tab - Activate Open Amount Gift Card - Item Tab

3. Under the 'Settings' group bar, type a **Short name**, such as 'Open GC Act.'

4. Type a **Chit name**, such as 'Open GC Act.'

5. Type a **Long name**, such as 'Open GC Activate.'

6. Select **Activate card** as the 'Gift card action' to activate the card upon approval.

7. Leave **None** as the 'Tax group.' Generally, gift cards are not taxable items.

8. Select the **Sales/retail category**, such as 'Retail'

9. Select the **Pricing** tab.
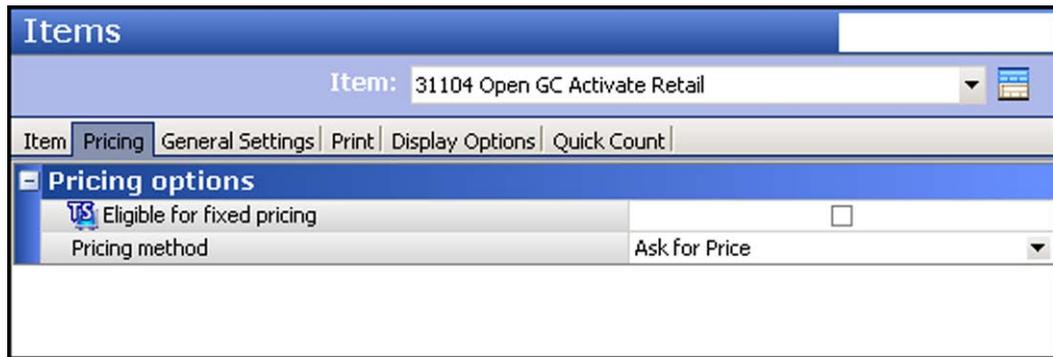
Figure 14 Pricing Tab - Activate Open Amount Gift Card

10. Select **Ask for Price** as the pricing method.

11. Click **Save** and continue to the **next procedure**.

To add value to an open amount gift card:

1. While still in the **Items** function, click the **New** drop-down arrow, select **Gift card** from the 'Type' list box, and click **OK**.

2. Accept the **system assigned number** or click the **ellipsis button (…)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.

Figure 15 Item Tab - Add Value Open Amount Gift Card - Item Tab

3. Under the 'Settings' group bar, type a **Short name**, such as '$10 GC Add.'

4. Type a **Chit name**, such as '$10 GC Add.'

5. Type a **Long name**, such as '$10 GC Add Value.'

6. Select **Add value** as the 'Gift card action' to activate the card upon approval.

7. Leave **None** as the 'Tax group.' Generally, gift cards are not taxable items.

8. Select the **Sales/retail category**, such as 'Retail'

9. Select the **Pricing** tab.
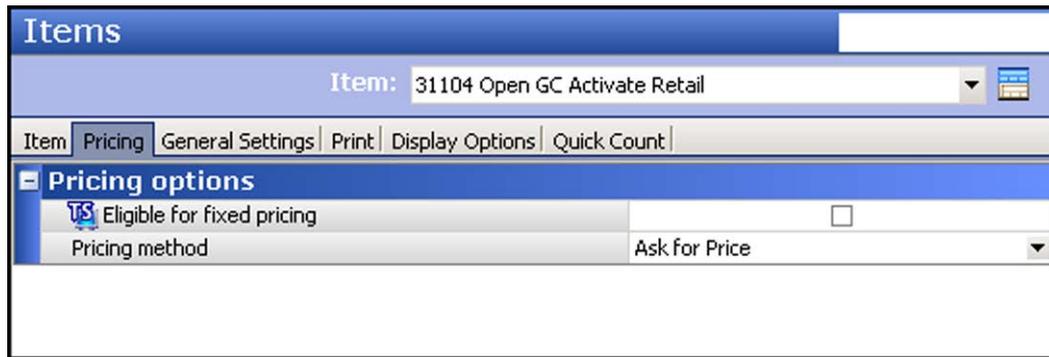
Figure 16 Pricing Tab - Add Value Predefined Amount Gift Card

10. Select **Ask for Price** as the pricing method.

11. Click **Save**.

Configure a tender for applying a payment with a gift card

To redeem gift cards for purchases, you must define a gift card tender. You need only add one tender for gift cards. When you define the tender as a gift card, the options in the Tender function that do not pertain to gift cards become disabled. If your restaurant allows overpayment when redeeming a gift card, or refunding the full cash value of a gift card back to the guest without purchasing an item at the store, then you must define the tender to allow overpayment and provide cash back.

To configure the Tender tab of a Givex gift card tender:

1. Select **Maintenance > Payments > Tenders**.

2. Click the **New** drop-down arrow, select **Gift card** from the 'Type' list box, and click **OK**.

3. Accept the **system assigned number** or click the **ellipsis button (…)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.

Figure 17 Tenders - Tender Tab

4. Under the 'Settings' group bar, type a **Short name**, such as '$10 GC.'

5. For Table Service, select **First available button position** to allow the system to place the tender button in the first available position of the FOH Tender screen.
    -OR-
    Click the **ellipsis (…)** to display the Button Position dialog box and select an available position for the gift card tender.

6. Select an **image**, such as the gift card logo, to appear on the button in place of the name, from the 'Button image' drop-down list.

7. Select the **tender** under which you want the credit card to report, if you do not want it to report as itself, from the 'Report as' drop-down list.
    -OR-
    Leave the default value of **Current** if you want the credit card to report as itself.

8. Select **how the tender behaves** in the FOH when selected for payment from the 'Default amount behavior' drop-down list, if you want it to behave differently than the default choice of 'Ask for

amount.' The other choices are 'Next highest amount,' 'Exact amount due,' and 'Specific amount.'

9. Select **Active** to make the tender available for use. If not active, an error message appears in the FOH when you select this tender for payment.

10. Clear **Affect deposit** since credit cards do not affect the total cash amount you have on hand for deposit.

11. Select **Print check on close** to print a copy of the guest check at the time you close the check using this tender. To save paper, clear this option to turn off printing of the guest check at close in environments where you provide a copy of the guest check to the guest prior to applying payment. The guest typically does not require another copy of the guest check after you tender and close the check.

12. Select **Open drawer on close** to open the drawer each time you apply payment and close a check to this tender.

13. Clear **Print signature line**. Use this option for non-cash tenders for which you require a signature from the guest, such as 'House account' and 'Property management' tender types. Do not confuse this option as one having to do with signature line rules that control when to print signature lines on gift card vouchers.

14. For Table Service, clear **Combine on check**.

15. For Table Service, select **Close check upon payment** to automatically close a check when the payments applied to the check meet or exceed the guest check amount.

16. For Table Service, clear or select **Do not verify amount** to determine the placement of the cursor on the FOH tender screen and whether you are able to change the amount to something less than the balance of the check. When you select this option, cursor focus is always just below the amount and you are unable to change the amount at all. When you clear this option, cursor focus is on the amount. You can change the amount to something less than the balance of the check but attempts to change the amount to something greater result in an error message. If the tender allows tips, you can change the amount to something greater than the balance of the check; however, the system calculates the difference and moves the excess amount to the tip amount

17. Under the 'Tips' group bar, select **Allow tips** to allow guests to add a tip to the guest check and pay it with this credit card.

18. Enter the **maximum allowable tip percentage** in 'Maximum tip %.' Enter the percentage as a number and two decimal places. For example, enter a percentage of 50% as 50.00.

19. For Table Service, type the **percentage of tips** to recover from employees for the cost of processing the transaction in 'Tip refund %.' Enter the percentage as a number and two decimal places. For example, enter a percentage of 50% as 50.00.

20. Select **Remove tip line if auto gratuity** to not print a tip line on guest checks paid with this tender, if you add an automatic gratuity.

21. Continue to the **next procedure**.

To configure the Type tab of a Givex gift card tender:

1. Select the **Type** tab.

Figure 18 Tenders - Type Tab

2. Under the 'Type settings' group bar, select **Private Label** as the gift card provider. Selecting a provider also selects 'Expiration,' which requires the entry of the expiration date when manually entering a credit card number.

3. Under the 'Options settings' group bar, select **Use magnetic card only** to prevent an employee from manually entering a credit card number without manager approval when applying this tender as payment. To override this setting for a certain employee and allow them to enter the number manually without manager approval, select 'Manual credit card number' for the appropriate access level in Maintenance > Labor > Pos Access Levels, and then assign that access level to the employee.

4. Clear **Expiration**. Givex gift cards are 'Track 2' only; they do not support expiration dates.

5. Select **Verify signature** to display a prompt reminding the employee to verify the signature on the card matches the signature on the gift card voucher.

6. For Quick Service, select **Display tender screen on card swipe** if you want the employee to verify the amount, or allow them to change the amount, applied to the card. If cleared, the system automatically sends the full amount of the transaction as soon as you slide the card across the reader.

7. If using select **Display ID field first on tender screen** to allow the Display ID field to appear first.

8. Click **Save** and continue to the **next procedure**.

Givex Gift Cards
Configuring Givex gift cards

To configure the Authorization tab of a Givex gift card tender:

1. Select the **Authorization** tab.

Figure 19 Tenders - Authorization Tab

2. Under the 'Authorization' group bar, select **Print on check** to print the authorization code on the guest check.

3. Clear **Allow force authorization on Gift Cards**, as this does not apply to Givex gift cards. If you select this option, the system initiates a forced redemption on the gift card. EDC does not transmit to the EDC processor and returns a 'Not Supported' error message.

4. Continue to the **next procedure**.

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To configure the Printers tab of a Givex gift card tender:

1. Select the **Printers** tab.
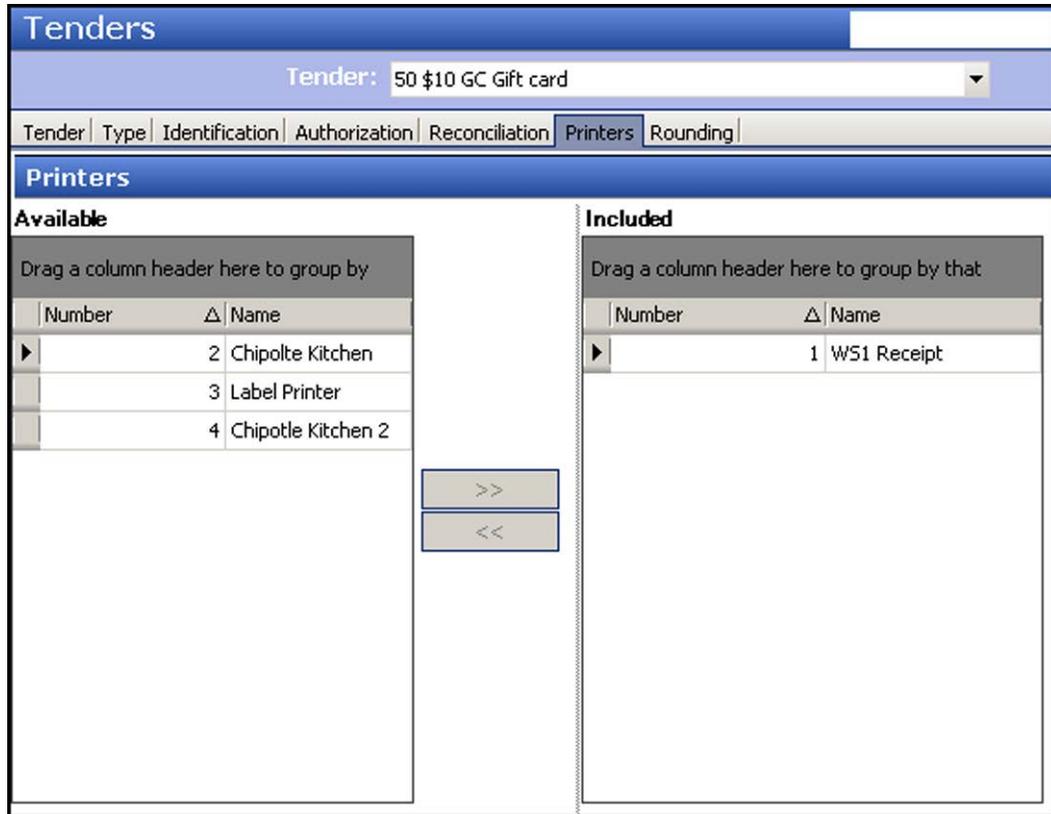
Figure 20 Tenders - Printers Tab

2. Select the **printer** from the 'Available' list box and click **>>** to move the printer to the 'Included' list box.
3. Click **Save** and exit the **Tenders** function.

Designating Givex as gift card processor

You must designate Givex as the processor for private label gift cards.

To designate Givex as the gift card processor:

1. Select **Maintenance > Electronic Draft Capture > Cards**.

Figure 21 Cards Function - Gift Cards Group Bar

2. Under the 'Gift Cards' group bar, select **Independent**, from the 'Private' drop-down list.
3. Select **Givex** from the 'Private independent processor drop-down list.
4. Click **Save** and exit the **Cards** function.

Adding Givex gift card buttons to the FOH

This section details how to configure Givex buttons to display on the Front-of-House (FOH); it includes both Quick Service and Table Service instructions.

Selling Givex Gift Cards in Quick Service

Create buttons and add them to the FOH for selling. For this section, you will use the gift card items that you created in Maintenance > Menu > Items.

To add a predefined amount gift card button for activation in QS:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.
2. Select **Work with Panels**.

3. Select **Panel > Open Panel**, select the **panel** containing your retail items, or a similar panel, and click **OK**.

4. Select an **available button** or right-click the **panel** and select **New Button**. The Properties dialog box appears.
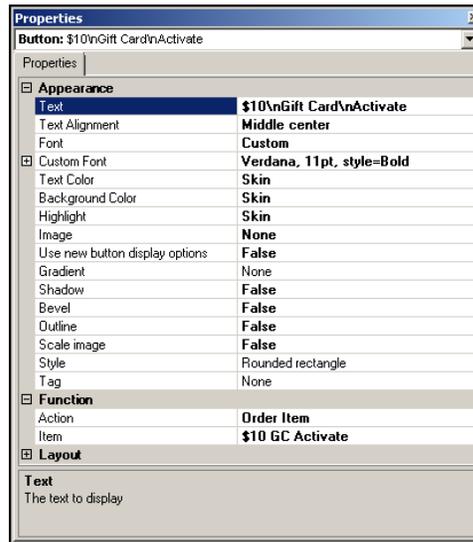
Figure 22 Predefined Amount for Activation Button

5. Under the 'Function' group bar, select **Order Item** from the 'Action' drop-down list.

6. Select the **predefined amount gift card item for activation** you created earlier from the 'Item' drop-down list.

7. Under the 'Appearance' group bar, type a **name** for the button, such as '$10 Gift Card Activate.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as '$10\nGift Card\nActivate.'

8. Configure the **remaining options** as you would for any other button function.

9. Select **Panel > Save Panel**.

10. Repeat this **procedure** for every predefined amount gift card for activation.

11. Select **File > Exit** to exit **Quick Service Screen Designer**.

To add a predefined amount gift card button to add value in QS:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.

2. Select **Work with Panels**.

3. Select **Panel > Open Panel**, select the **panel** containing your retail items, or a similar panel, and click **OK**.

4. Select an **available button** or right-click the **panel** and select **New Button**. The Properties dialog box appears.
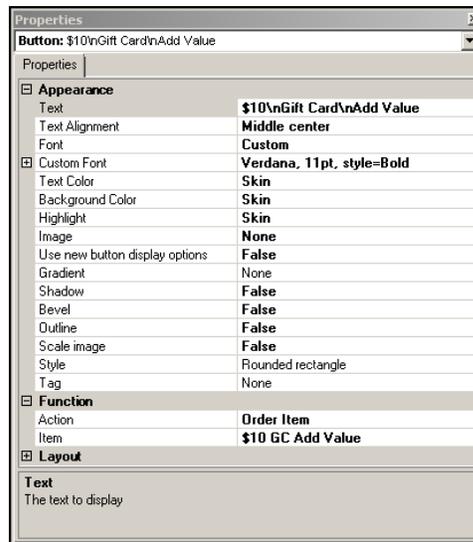
Figure 23 Predefined Amount Add Value Button

5. Under the 'Function' group bar, select **Order Item** from the 'Action' drop-down list.

6. Select the **predefined amount gift card item to add value** you created earlier from the 'Item' drop-down list.

7. Under the 'Appearance' group bar, type a **name** for the button, such as '$10 Gift Card Add Value.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as '$10\nGift Card\nAdd Value.'

8. Configure the **remaining options** as you would for any other button function.

9. Select **Panel > Save Panel**.

10. Repeat this **procedure** for every predefined amount gift card to add value.

11. Select **File > Exit** to exit **Quick Service Screen Designer**.

To add an open amount gift card button for activation in QS:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.

2. Select **Work with Panels**.

3. Select **Panel > Open Panel**, select the **panel** containing your retail items, or a similar panel, and click **OK**.

4. Select an **available button** or right-click the **panel** and select **New Button**. The Properties dialog box appears.

Figure 24 Open Amount Activation Button

5. Under the 'Function' group bar, select **Order Item** from the 'Action' drop-down list.

6. Select the **open amount gift card item for activation** you created earlier from the 'Item' drop-down list.

7. Under the 'Appearance' group bar, type a **name** for the button, such as 'Open Amount Gift Card Activate.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as 'Open Amt\nGift Card\nActivate.'

8. Configure the **remaining options** as you would for any other button function.

9. Select **Panel > Save Panel**.

10. Repeat this **procedure** for every open amount gift card to activate.

11. Select **File> Exit** to exit the **Quick Service Screen Designer**.

To add an open amount gift card button to add value in QS:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.

2. Select **Work with Panels**.

3. Select **Panel > Open Panel**, select the **panel** containing your retail items, or a similar panel, and click **OK**.

4. Select an **available button** or right-click the **panel** and select **New Button**. The Properties dialog box appears.
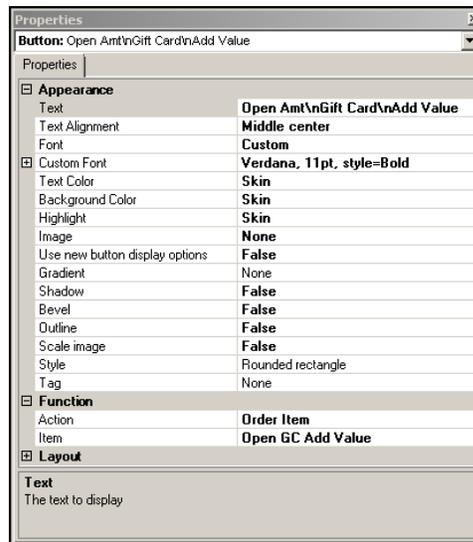
Figure 25 Open Amount Add Value Button

5. Under the 'Function' group bar, select **Order Item** from the 'Action' drop-down list.

6. Select the **open amount gift card item to add value** you created earlier from the 'Item' drop-down list.

7. Under the 'Appearance' group bar, type a **name** for the button, such as 'Open Amount Gift Card Activate.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as 'Open Amt\nGift Card\nAdd Value.'

8. Configure the **remaining options** as you would for any other button function.

9. Select **Panel > Save Panel**.

10. Repeat this **procedure** for every open amount gift card to add value.

11. Select **File> Exit** to exit the **Quick Service Screen Designer**.

Redeeming Givex gift cards in QS

Create buttons and add them to the FOH for redemption. For this section, you will use tenders that you created in Maintenance > Payments > Tenders.

To add a Givex gift card redemption button in QS:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.

2. Select **Work with Panels**.

3. Select **Panel > Open Panel**, select the **panel** containing your tenders, and click **OK**.

4. Select an **available button** or right-click the **panel** and select **New Button**. The Properties dialog box appears.
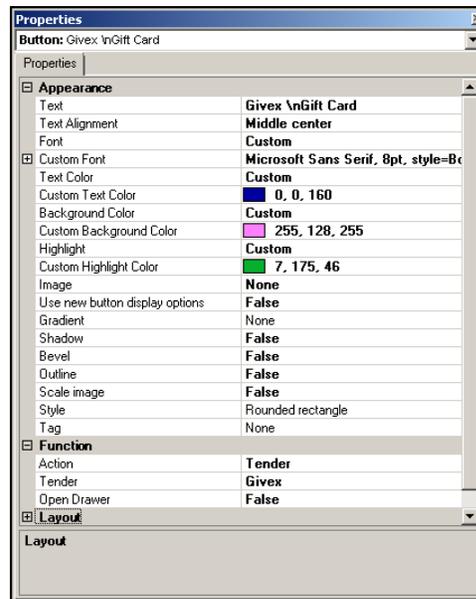
Figure 26 Redeeming Givex

5. Under the 'Function' group bar, select **Tender** from the 'Action' drop-down list.

6. Select **Givex** from the 'Tender' drop-down list.

7. Select **True** to allow the cash drawer to open or **False** to keep the cash drawer closed upon tender from the 'Open Drawer' drop-down list.

8. Under the 'Appearance' group bar, type a **name** for the button, such as 'Givex Gift Card.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as 'Givex\nGift Card.'

9. Select **Panel > Save Panel**.

10. Select **File> Exit** to exit the **Quick Service Screen Designer**.

Selling Givex gift cards in TS

Create buttons and add them to the FOH for selling. For this section, you will use the gift card items that you created in Maintenance > Menu > Items.

To add a predefined amount gift card button for activation in TS:

1. Select **Maintenance > Menu > Submenus**.
2. Select the **submenu** to contain the gift card item, such as 'Retail.'
3. Click an **available position**.
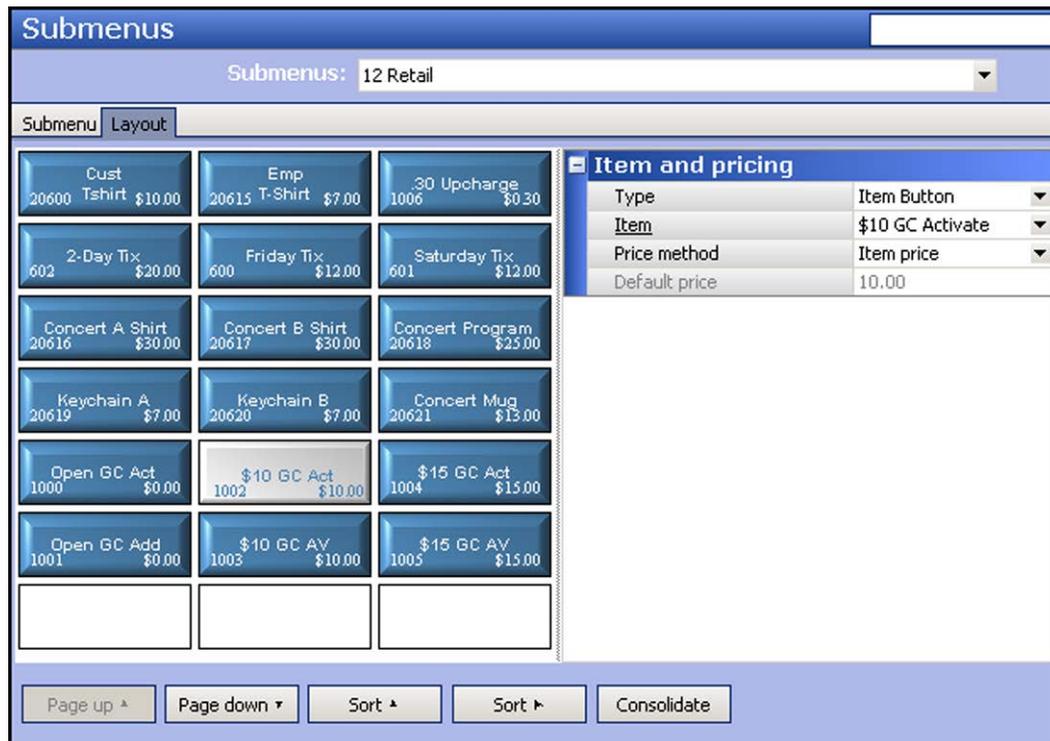
Figure 27 Predefined Amount Activate

4. Under the 'Item and pricing' group bar, select **Item Button** from the 'Type' drop-down list.
5. Select the **predefined amount gift card item for activation that you created earlier** from the 'Item' drop-down list.
6. Select **Item price** from the 'Price method' drop-down list.
7. Continue to the **next procedure**.

To add a predefined amount gift card button to add value in TS:

1. While still in the **Submenus** function, click the an **available position**.
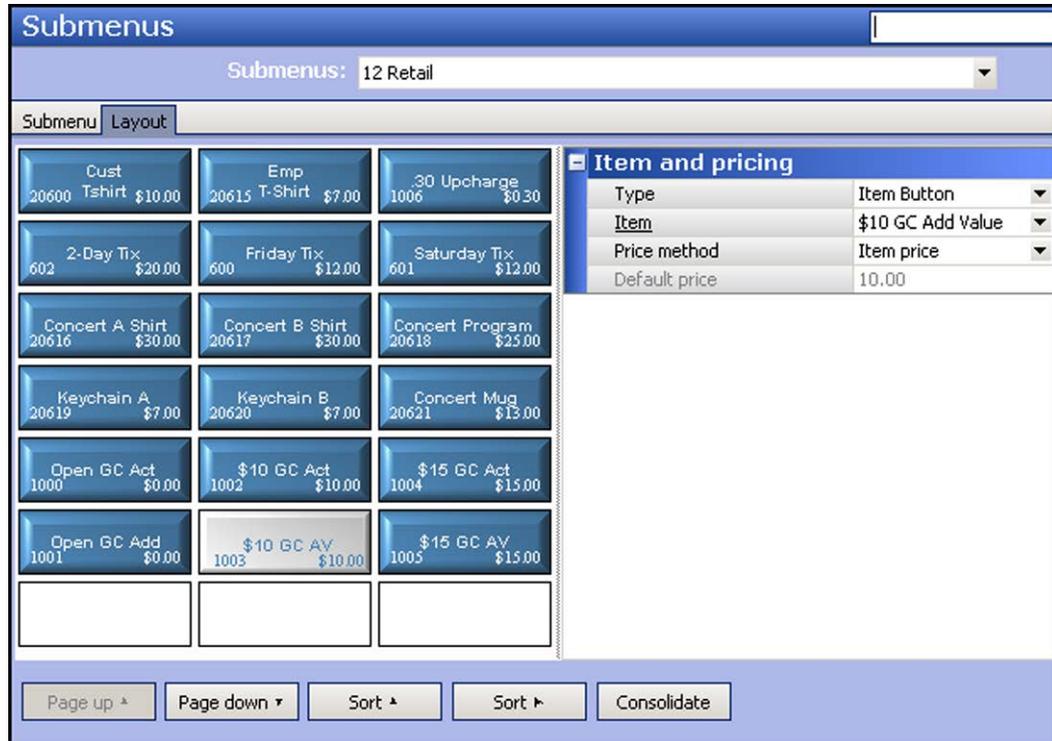
Figure 28 Predefined Amount Add Value

2. Under the 'Item and pricing' group bar, select **Item Button** from the 'Type' drop-down list.

3. Select the **predefined amount gift card item to add value that you created earlier** from the 'Item' drop-down list.

4. Select **Item price** from the 'Price method' drop-down list.

5. Continue to the **next procedure**.

To add an open amount gift card button for activation in TS:

1. While still in the **Submenus** function, click the an **available position**.
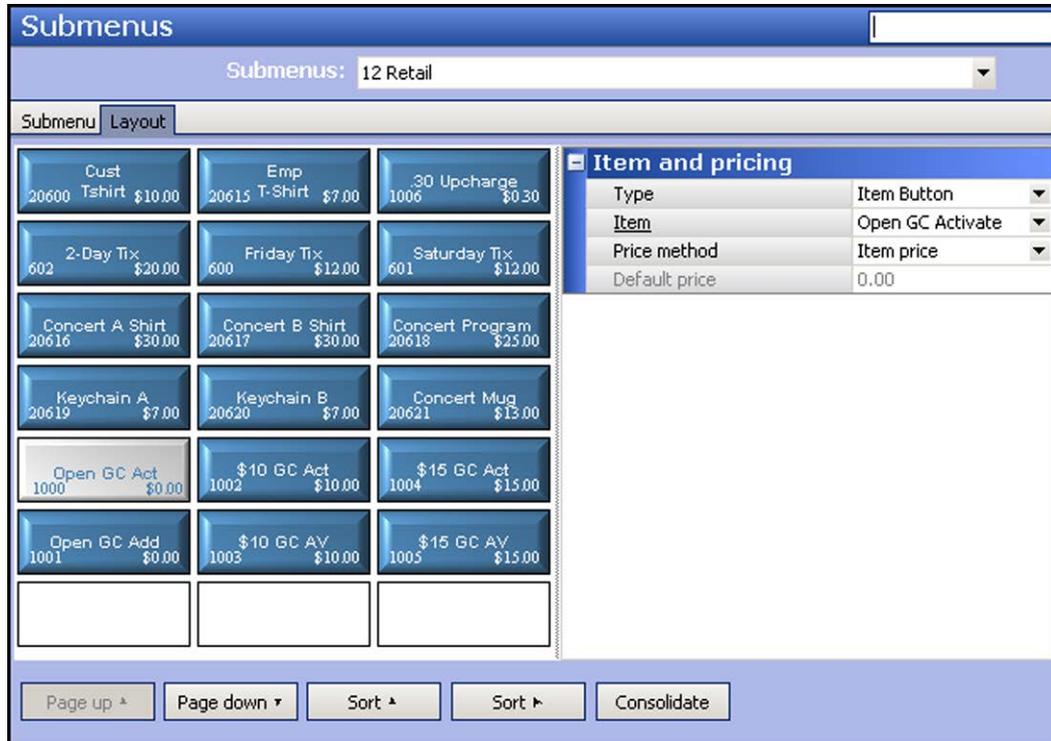
Figure 29 Open Amount Activate

2. Under the 'Item and pricing' group bar, select **Item Button** from the 'Type' drop-down list.

3. Select the **open amount gift card item for activation that you created earlier** from the 'Item' drop-down list.

4. Select **Item price** from the 'Price method' drop-down list.

5. Continue to the **next procedure**.

To add an open amount gift card button to add value in TS:

1. While still in the **Submenus** function, click the an **available position**.
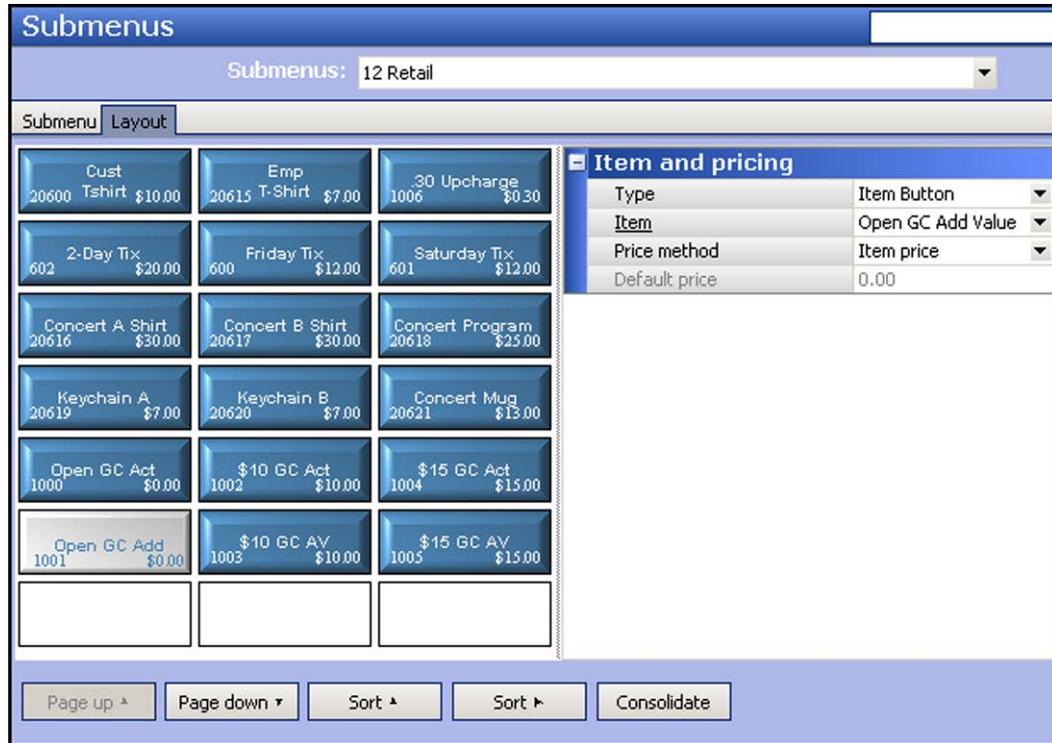
Figure 30 Open Amount Add Value

2. Under the 'Item and pricing' group bar, select **Item Button** from the 'Type' drop-down list.

3. Select the **open amount gift card item to add value that you created earlier** from the 'Item' drop-down list.

4. Select **Item price** from the 'Price method' drop-down list.

5. Click **Save** and exit the **Submenus** function.

Redeeming Givex gift cards in TS

When you created the Givex gift card tender in Maintenance > Payments > Tenders, you designated a button to display in the first available button position, or selected an available position on the Tender screen. Refer to _"Configure a tender for applying a payment with a gift card" on page 24_ for more information.

Supporting gift card activation and query by bar code scan

You can use a bar code scanner to scan a gift card for redemptions. To increase your speed-of-service, you can also use a bar code scanner to activate, add value to, and query the balance of, a gift card. Additionally, you can perform a refund using a bar code scanner for Givex gift cards.

> **Note**
>
> There is no configuration needed for this enhancement

Allowing a guest to cash out a Givex gift card

In many states, you must allow a guest to receive the remaining funds on a gift card in the form of immediate cash out. You can configure your Givex processor to allow a guest to cash out their Givex gift card, upon request. This feature allows you to return the remaining card balance to the guest without opening a guest check, as long as the amount falls within regional restrictions. You can also control who can perform the cash out function. The Givex cash out information appears on the Audit Report, as well as the Employee Checkout report, the Drawer Paid Out report, the Drawer Payments report, and the Server Sales report.

> **Note**
>
> Regional laws limit the amount of cash out a guest can receive back from a Givex gift card. There is no configuration required for this limitation; the Givex processor handles the regional laws limiting how much cash is approved for cash back on a gift card.

Configuring Givex cash out

To configure the Givex cash out feature, you must provide an appropriate employee with the appropriate access level, create a 'Gift card cash out' petty cash account, and a 'Gift card cash out' button.

To provide the ability to cash out a Givex gift card:

1. Select **Maintenance > Labor > Pos Access Levels**.
2. Select the **access level** to which you want to allow the ability to cash out a Givex gift card.
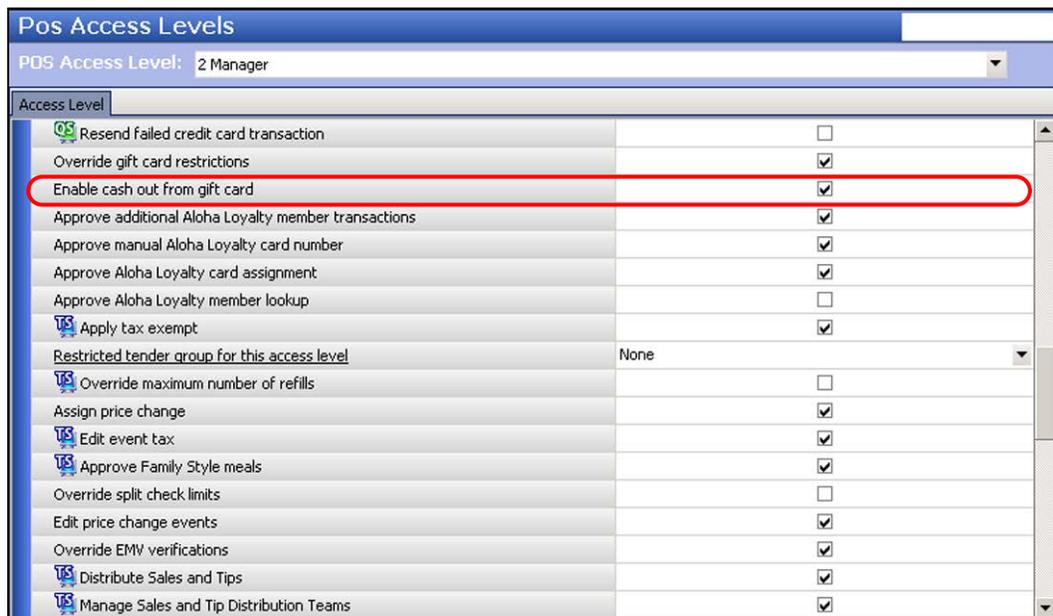
Figure 31 Pos Access Level - Financial Group Bar

3. Under the 'Financial' group bar, select **Enable cash out from gift card** to allow employees assigned to this access level to use a 'Gift card cash out' button to provide cash back to a guest requesting the balance of a gift card in the form of cash; this feature does not require an open guest check.
4. Click **Save**.
5. Repeat this **procedure** for each access level requiring the ability to cash out a Givex gift card.
6. Exit the **Pos Access Levels** function.

To assist with employee reporting at checkout of cash given to guests requesting the balance of a Givex gift card in cash back, create a petty cash account specific to Givex cash out. The button you create to provide the cash back ties back to this petty cash account.

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To create a petty cash account specifically for providing cash back on Givex gift cards:

1. Select **Maintenance > System Settings > Petty Cash Account.**

2. Click the **New** drop-down arrow, select **Paid out** from the 'Type' list box, and click **OK**.

3. Accept the **system assigned number** or click the **ellipsis (…)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number.**

Figure 32 Givex Cash Out Petty Cash Account

4. Type a **name**, such as 'Givex Cash Out,' for the petty cash account.

5. Configure the **remaining options** as you would for any other petty cash account.

6. Click **Save** and exit the **Petty Cash Account** function.

Create a Givex Cash Out button to provide a means for contacting the Givex processor to obtain the remaining balance on a gift card when a guest requests the balance back as cash out.

To add a Givex Cash Out button:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer** or **Table Service Screen Designer**.

2. Select **Work with Panels**.

3. Select **Panel > Open Panel**.

4. If using Quick Service, select a **panel** of your choosing and click **OK**.

5. If using Table Service, you must select a **floor plan panel** to edit, and click **OK**.

6. Select an **available button** or create a **new button**. The Properties dialog box appears.
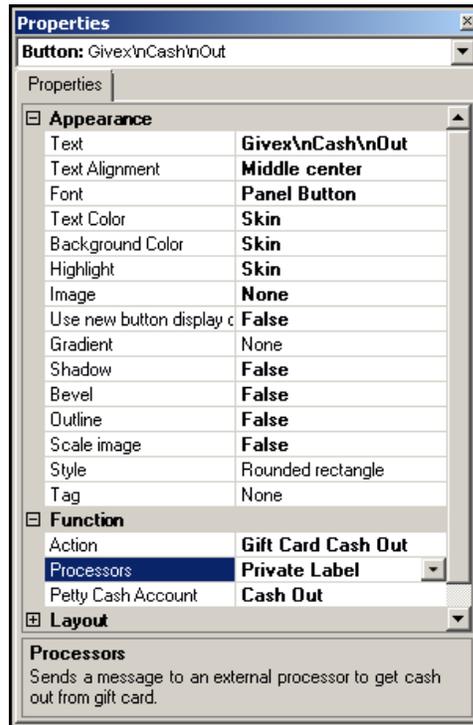
Figure 33 Givex Cash Out Button

7. Under the 'Function' group bar, select **Gift Card Cash Out** from the 'Action' drop-down list.

8. Select **Private Label** from the 'Processors' drop-down list.

9. Select **the petty cash account created specifically for Givex** from the 'Petty Cash Account' drop-down list.

10. Under the 'Appearance' group bar, type a **name** for the button, such as 'Givex\nCash\nOut;' to display text on multiple lines, insert '\n' without spaces for line breaks.

11. Configure the **remaining options** as you would for any other button.

12. Select **Panel > Save All Panels**.

13. Exit the **Screen Designer** function.

Refreshing the data

Once you configure the necessary features for Givex, you must refresh the Aloha POS system, then stop, and restart EDC Service (EDCSvr). Select Utilities > POS > Refresh POS & All Installed Products to transfer the new information to the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. *Note:* If you run the refresh prior to the EOD process, select 'Automatically restart all Aloha POS terminals' and click OK to continue. After the data refresh is complete, all new settings become operational across the Aloha network.

> ⚠ **Caution**
> Refresh data with caution and never during peak hours of operation. All FOH terminals reboot during a refresh and are down for a short period of time.

Go to Windows Services, select EDC Service to stop and then restart.

To stop POS processing in Aloha EDC:

1. Navigate and log in to **Aloha EDC**.
2. Select **File > Stop POS Status Processing**, or click the **On** toggle button to end the POS Status Processing. *Note:* Do not skip this step as it is necessary when making changes to Aloha EDC.
3. After the Aloha EDC has stopped, select **File > Start POS Status Processing**, or click the **Off** toggle button to restart the POS Status Processing.

Using Givex gift cards

You must use a gift card tender to accept a gift card as a form of payment for goods sold. You can add a tip to the payment only if the tender is set up as 'tippable.'

> **!** **Important**
> Givex does not allow offline transactions.

If you are required to enter the gift card using a magnetic card reader, and the card is unreadable, someone with sufficient access must enter the card manually.

Redeeming Givex gift cards

1. Enter **items** as usual.

Figure 34 Tender Screen

2. Navigate to the **Tenders** screen containing Givex.
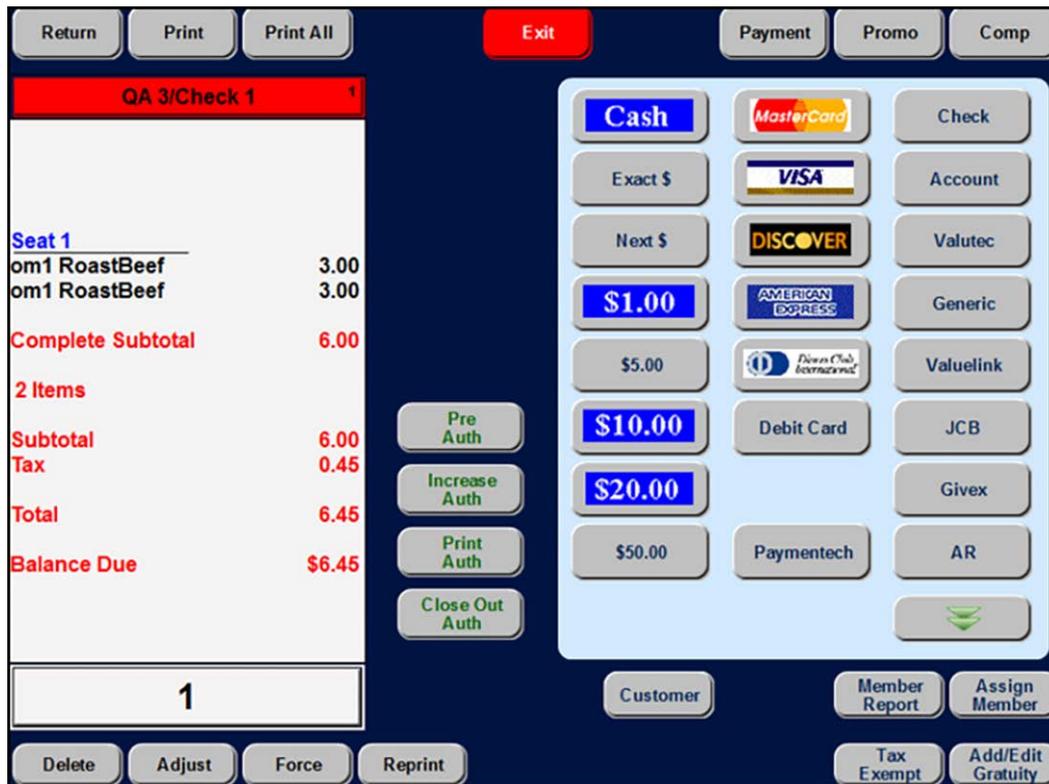
Figure 35 Tender Screen

3. Touch **Givex**. The Givex screen appears.
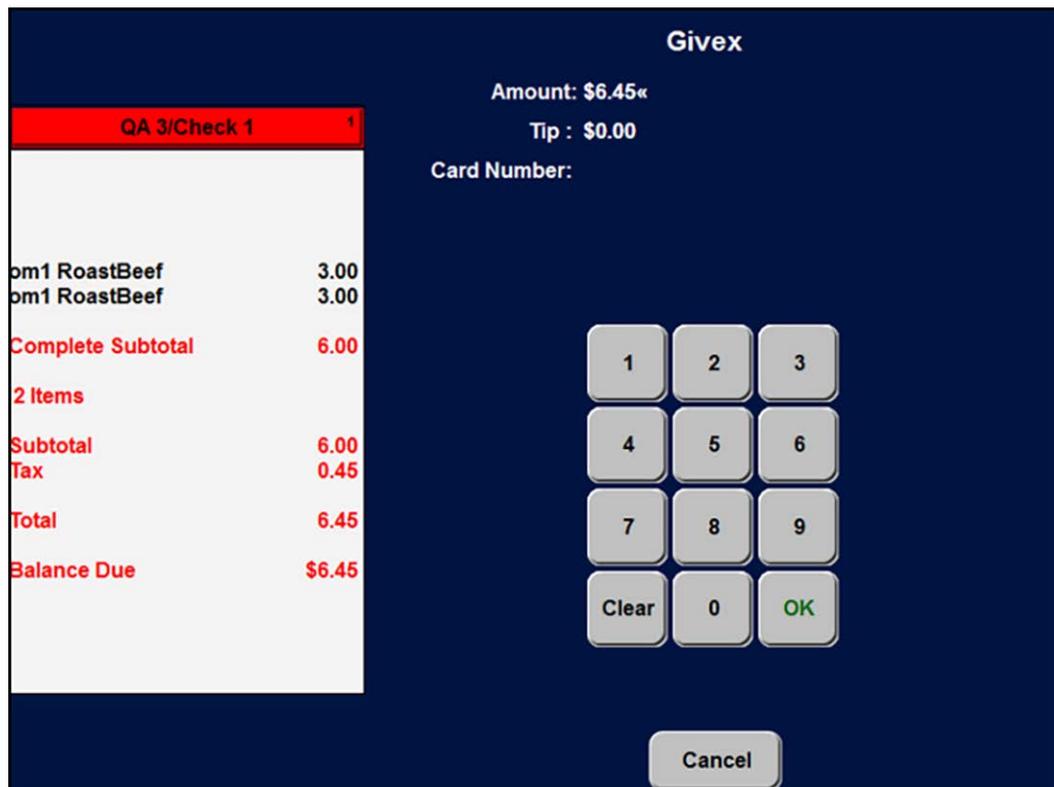
Figure 36 Givex Redemption Screen

4. To accept the amount, touch **OK**.

5. Enter a **tip**, if applicable.

6. Touch **OK**.

7. Enter the Givex **gift card number**, and touch **OK**.
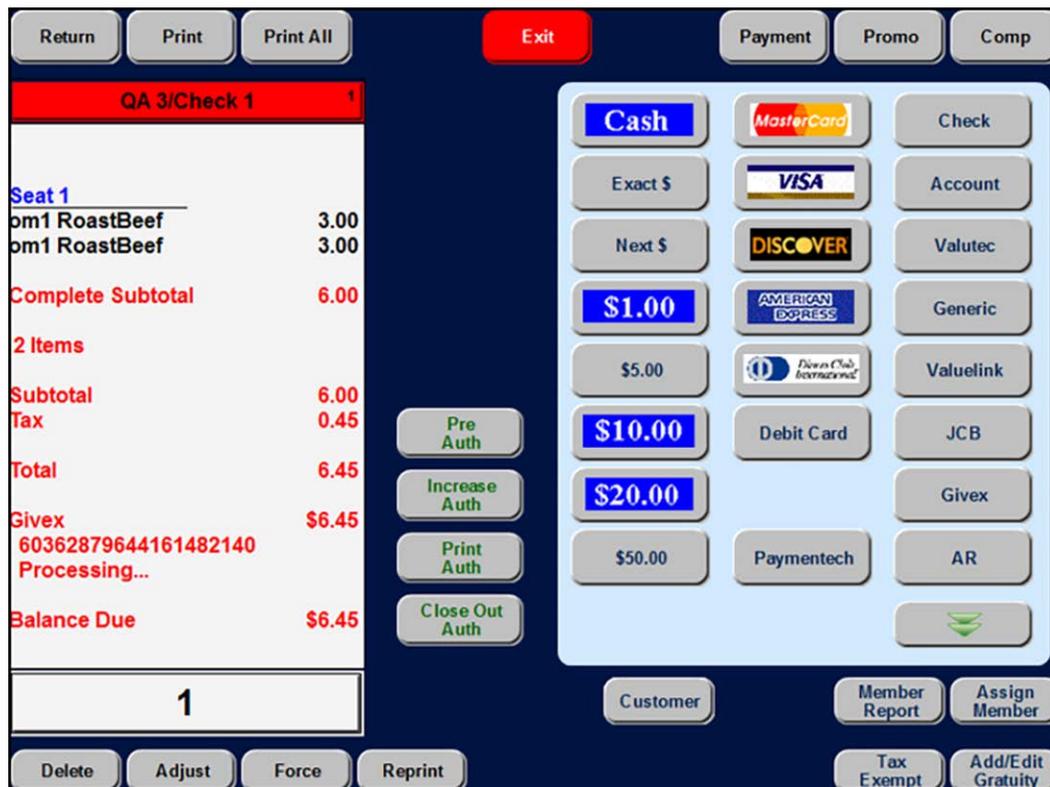
Figure 37 Processing Givex Gift Card

8. Close the **check**.

Cashing out a Givex gift card

1. A guest hands you a **Givex gift card,** requesting the remaining balance of the gift card in cash back.

2. Locate and touch the **Givex Cash Out** button. If your access level allows you to perform this function, the Please Enter Card screen appears; otherwise, the manager approval screen appears.

3. Slide the **gift card** through the magnetic stripe reader or manually enter the **gift card number and touch OK.** The system sends a request to the Givex processor, which then provides the available cash back amount, or displays an error message if the amount is outside the regional restrictions.

4. If the balance remaining is within the regional restrictions, note the **amount**, touch the **message** to dismiss it, and hand an **amount equal to the balance** of the gift card to the guest.

Activating a Givex gift card

1. Navigate to the **screen** where the **Givex activation button** exists.
2. Touch **Givex Activate**. An Open Item screen appears.
3. Enter the **amount** and touch **OK**. The Givex Activate screen appears with the activation amount auto-populating.

Figure 38 Givex Activate Screen

4. Slide the **Givex gift card**. The card is now activated. Depending upon the configuration, the system returns you to the WWT or main menu screen.

Adding value to a Givex gift card

1. Navigate to the **screen** where the **Givex add value button** exists.
2. Touch **Givex Add Value**. An Open Item screen appears.

3. Enter the **amount** and touch **OK**. The Givex Add Value/Activate screen appears with the activation amount auto-populating.

Figure 39 Givex Activate Screen

4. Slide the **Givex gift card**. The card has value added. Depending upon the configuration, the system returns you to the WWT or main menu screen.

Determining the balance of a Givex gift card

Navigate to the **screen** where the **Givex Balance button** exists.

1. Touch **Givex Balance**. The Givex Balance Check screen appears.

Figure 40 Givex Balance Screen

2. Slide the **Givex gift card** or manually enter the **card number** and then touch **OK**. The Aloha Givex Details screen appears.

Figure 41 Aloha Givex Details Screen

3. Provide the **information** to the guest and then touch **OK** to close the Aloha Givex dialog box.

Reporting Givex gift cards

Givex is available on the following reports: Payment Detail and Audit. See below for examples.

Aloha Café
5555 Fifth Avenue South
Naples, FL 34102

Payment Detail Report
07/29/2014

Page 1 of 1
08/23/2014 – 10:07 AM
Printed by: Seeded Administrator

**** PAYMENTS****

*** Cash ***

Check #	Card #	Exp	Qty	Amount	Tip	Total	Emp
10002			1	100.25	10.00	110.25	Tufo, Marcus
Total Cash:			1	100.25	10.00	110.25	

*** Givex ***

Check #	Card #	Exp	Qty	Amount	Tip	Total	Emp
10003			1	17.25	0.00	17.25	Tufo, Marcus
Total Givex:			1	17.25	0.00	17.25	

**** SUMMARY ****

Figure 42 Payment Detail Report Example

Aloha Café
5555 Fifth Avenue South
Naples, FL 34102

Audit Report
07/29/2014

Page 1 of 1
08/23/2014 – 10:07 AM
Printed by: Seeded Administrator

**** PAYMENTS****

*** Cash ***

Time	Type	Transaction
03:48 PM	APPLY PAYMENT	Givex on q3-1 Chk 10003 by 132 Marcus 17.25 Tip 0:00
03:49 PM	DELETE PAYMENT	Mgr: 126 Clay Emp: 132 Marcus on q3-1 Chk 10003 Givex 17.25 Tip 0:00
03:52 PM	APPLY PAYMENT	Cash on q3-2 Chk 10002 by 132 Marcus 100.25
03:53 PM	APPLY PAYMENT	Givex on q3-1 Chk 10001 by 132 Marcus 12.25 Tip 0:00

Figure 43 Audit Report Example

Troubleshooting Givex gift cards

The following are helpful hints and troubleshooting tips for Givex gift cards.

If you have issues with Givex, check the GCM.log.
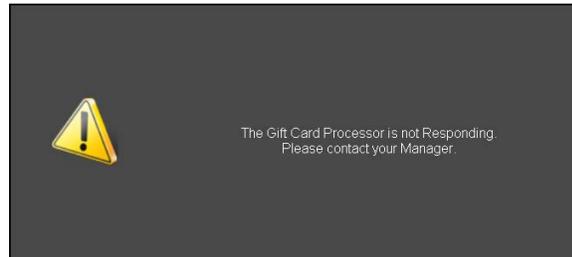

Figure 44 Gift Card Processor Not Responding

If this error message appears, there is an issue with the Givex configuration. Touch to dismiss error message.
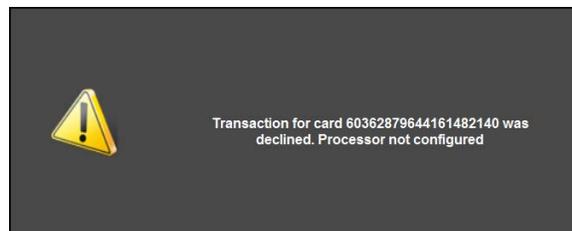
Figure 45 Processor Not Configured

If this error message appears, you must configure Givex as the gift card provider.

Givex Gift Cards

NCR welcomes your feedback on this document. Your comments can be of great value in helping us improve our information products. Please contact us using the following email address: Hospitality.HSR@ncr.com