

Feature Focus Guide: Global Payments

Core Product: Aloha Table Service, Aloha Quick Service, Aloha Payment Solutions
Last Updated: June 13, 2024

Contents

- About Global Payments** 4
- Configuring Global Payments** 6
 - Preparing the Aloha POS system 6
 - Configuring Aloha Payment solutions 24
 - Configuring the Ingenico Desk/5000 payment terminal 31
 - Using Global Payments 33
- Troubleshooting Global Payments** 40

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Revision Record

Date	Version #	Description
Prior to 01/12/2023	v12.3+	Created the APS Global Payments Feature Focus Guide.
	v12.3+	Added Troubleshooting Global Payments section.
01/12/2023		Converted the document to use new templates. Updated front cover and back page to reflect new NCR branding.
06/13/2024		Updated document to reflect NCR Voyix branding.

About Global Payments

Global Payments at a Glance	
Core Product	Aloha® Quick Service, NCR Aloha Table Service, NCR Aloha Payment Gateway
Complementary Products	
Separate License Required?	Yes. Credit card + MX. Gift Card + MX, if using the Gift Card feature.
Other References	Aloha Quick Service Reference Guide, Aloha Table Service Reference Guide

Global Payments, a worldwide leader in payments technology and software solutions, is a payment solution that utilizes Aloha Payment Solutions (APS) to communicate with and pass electronic payment data to and from the Aloha Point-of-Sale (POS) system. This solution supports credit, debit, and gift card transaction types. Use this document to configure the Aloha POS system and APS with Global Payments.

Supported payment terminals

Currently, the Global Payments solution supports only the Ingenico Desk/5000 payment terminal.

Software requirements

Following are the general prerequisites for installation and usage on Back-of-House (BOH) site controllers and Front-of-House (FOH) terminals. It is possible that a specific plug-in might have slightly different prerequisites listed in its installation document, in which case the prerequisites in the installation document have priority over this list.

GENERAL PREREQUISITES	BOH	FOH
Windows 10 or Windows 10 POS Ready	YES	YES
Aloha POS v12.3, v15.1 or later	YES	YES
APS v18.7 or later		
ATG v17.8 or later		
Microsoft .NET Framework 3.5 installed with latest service packs	YES	YES
* TLS support for .NET 3.5.1 on Windows 10 (http://support.microsoft.com/kb/3154518)	YES	YES
Microsoft .NET Framework 4.0 installed with latest service packs	YES	YES
Microsoft C++ 2008 redistributable installed with latest service packs	YES	YES
Microsoft Web Services Enhancement (WSE) 3.0 Available at http://www.microsoft.com/download/en/details.aspx?id=14089	YES	NO

Microsoft SQL Server 2005 or later (details at http://support.microsoft.com/kb/889615) Requires installation in mixed mode with SQL Server Browser enabled	YES	NO
Compatible version of Aloha Transaction Gateway (ATG)	YES	NO
Credit Card + MX (EDC) must be enabled on the HASP license key, and Gift Card + MX, if using the Gift Card feature.	YES	YES

Supported transactions

APS and Global Payments support credit and debit cards.

TRANSACTION	CREDIT CARD	DEBIT CARD
Sale/Purchase	X	X
Pre-Authorization	X	
Increase Authorization	X	
Completion	X	X
Refund	X	X
Void Sale	X	X
Void Refund Sale	X	X
Batch Settlement		

Additionally, guests can redeem and reload gift cards.

Configuring Global Payments

The Global Payments solution leverage Aloha Payment Solutions to support the passing of payment information between the Aloha POS and Global Payments.

Preparing the Aloha POS system

This section discusses the configuration requirements for the Aloha POS system to use the Global Payments solution. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Aloha POS 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 > Additional Features if using Aloha Manager, or Maintenance > Business > Corporate Administration if using Aloha Configuration Center, to expose all options that relate to gift cards. See page 7 .
2.	Access Maintenance > Business > Store > Store Settings tab. Select the Gift card/Certificate sales group to designate a gift card provider. See page 7 . Select the Credit Card group to enable Aloha Payment Solutions (See page 8) and configure pre-authorization amounts for credit cards (See page 9).
3.	Access Maintenance > Menu > Items to create gift card items for: <ul style="list-style-type: none"> • Selling a predetermined value gift card. See page 10. • Adding a predetermined value to a gift card. See page 12. • Selling an open amount gift card. See page 14. • Adding an open amount value to a gift card. See page 15.
4.	Access Maintenance > Menu > Submenus to add gift card items to a Table Service submenu. See page 16 . -OR- Access Maintenance > Screen Designer > Quick Service Screen Designer to add gift card items to a menu panel in Quick Service. See page 17 .
5.	Access Maintenance > Payments > Tenders to create an APS tender for electronic payment processing. See page 19 . For QS only, access Maintenance > Screen Designer > Quick Service Screen Designer to add the credit card tender button to the FOH. See page 21 .
6.	Access Maintenance > Payments > Tenders to create a pre-authorization button to appear on the Close screen (TS only - Optional). See page 22 .
7.	Select Utilities > Refresh POS & All Products to refresh the data. See page 23 .

Exposing gift card options

You must expose all options in the user interface related to gift cards, if you plan to use gift cards with Global Payments.

1. Select **Maintenance > Business > Additional Features** if you are using Aloha Manager.
-OR-
Select **Maintenance > Business > Corporate Administration** if you are using Aloha Configuration Center.

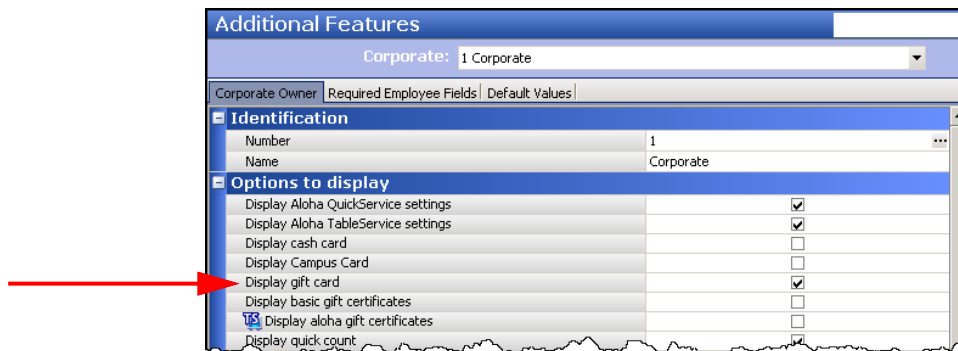


Figure 1 Display Gift Card

2. Select **Display gift card** to expose all options that relate to gift cards.
3. Click **Save** and exit **Additional Features**.
4. Log out of the **CFC/Aloha Manager** and then **log in** again to see the new options.

Designating a gift card provider

You must designate the provider of the gift card program to implement at your restaurant, in this case, Stored Value Systems.

To configure a gift card provider:

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

Store: 10 Aloha Café	
Location Information Licensing Custom Store Settings Aloha Manager	
Gift sales	
Gift card/certificate provider	Stored Value Systems
Store number for IVR redemptions	0
Gift card settings	
Requires card to be swiped upon activation	<input type="checkbox"/>
Quantity sales method	Prompt for each card number
Printing properties	
Card number masking method	Show last 4 digits on all vouchers
Voucher	
Print guest check message	<input checked="" type="checkbox"/>
Print large text	<input type="checkbox"/>
Print tip line	<input checked="" type="checkbox"/>
Number of copies	2
Text to print on voucher 1	Restaurant Copy
Text to print on voucher 2	Customer Copy
Restrictions	
Cannot redeem same gift card twice in a day	<input checked="" type="checkbox"/>
Cannot activate and redeem gift card on same day	<input checked="" type="checkbox"/>
Restrict multiple redemptions of the same gift card on a single check	<input checked="" type="checkbox"/>
Restrict multiple add values of the same gift card on a single check	<input type="checkbox"/>
Restrict activation of gift card until tendered	<input checked="" type="checkbox"/>
Aloha Stored Value	
Complete Aloha Loyalty processing before applying payment	<input checked="" type="checkbox"/>

Figure 2 Gift Card/Certificate Sales Group

- Under the 'Gift sales' group bar, select **Stored Value Systems** from the 'Gift card/certificate provider' drop-down list.
- Click **Save** and exit the **Store** function.

Enabling APS

To enable the Aloha Payment Solutions to pass electronic payment information between the Aloha POS system and Global Payments, you must first enable Electronic Draft Capture (EDC) and Chip N PIN functionality.

- Select **Maintenance > Business > Store**.
- Select the **Store Settings** tab.
- Select the **Credit Card** group located at the bottom of the screen.

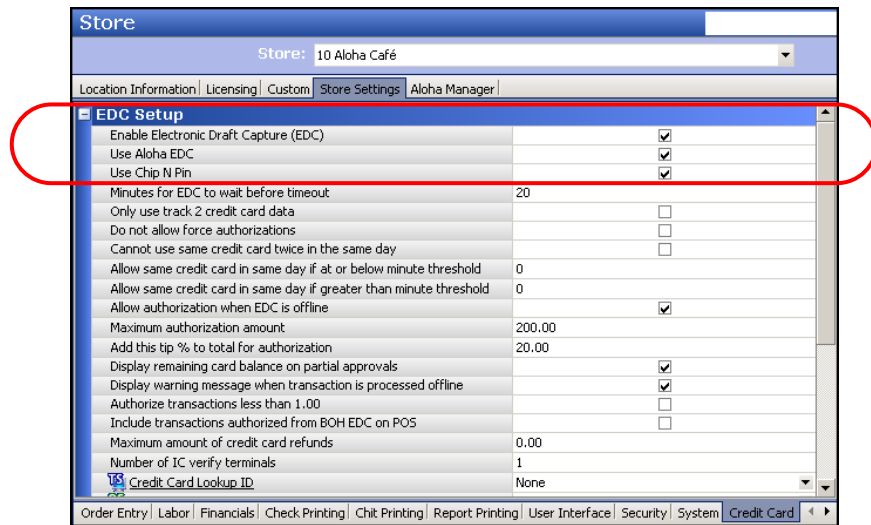


Figure 3 Store Settings - Credit Card Group

4. Under the 'EDC Setup' group bar, select **Enable Electronic Draft Capture**.
5. Select **Use Aloha EDC**.
6. Select **Use Chip N Pin** to enable the Chip and PIN functionality.
7. Continue to the next **procedure**.

Configuring pre-authorization amount

The POS system does not ask for amount on pre-authorization. You configure these amounts in CFC/Aloha Manager.

To configure pre-authorization amounts:

1. While still in Maintenance > Business > Store > Store Settings tab > Credit Card group, under the 'Authorization' group bar, type an **amount**, such as '50.00,' for 'Initial pre-authorization amount.'

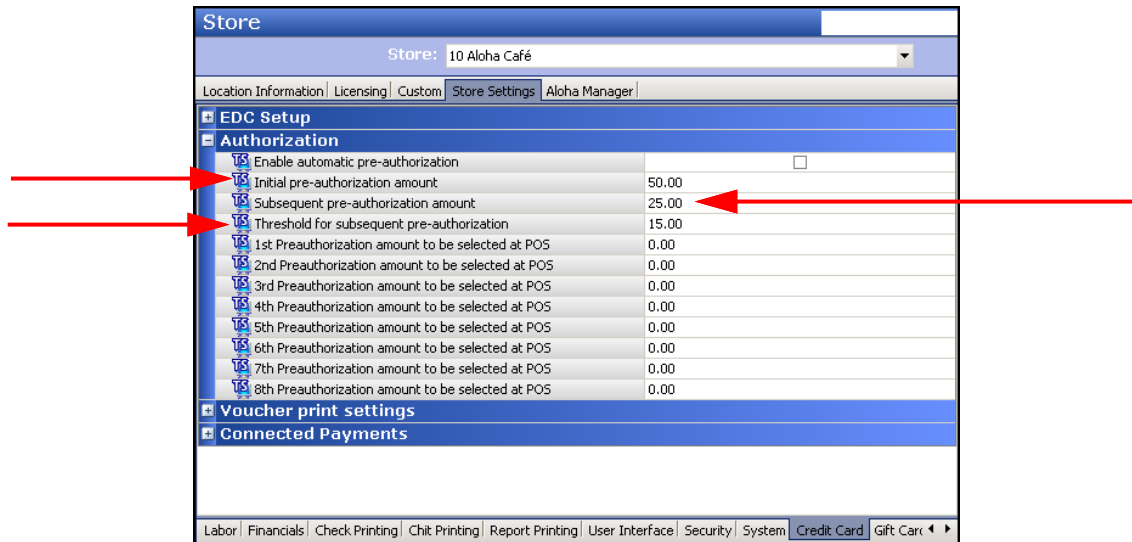


Figure 4 Authorization Group Bar

2. Type an **amount**, such as '25.00,' for 'Subsequent pre-authorization amount.'
3. Type an **amount**, such as '15.00,' for 'Threshold for subsequent pre-authorization.'
4. Click **Save** and exit the **Store** function.
5. Continue to the **next procedure**.

Creating gift card items for selling

As with everything you sell in the Aloha system, you must create an item to add to the guest check when a guest wishes to purchase a gift card. The type of gift cards you sell determines the configuration required for the item. For example, if you sell gift cards with a predetermined amount, such as \$20.00, \$30.00, and \$50.00, create an item for each denomination. If you sell open value gift cards that allow the customer to designate the value of the gift card, you only have to create one item and then enter the value at the time you sell the gift card. You also need to create an item for adding value to an existing gift card already in use.

To create an item for selling a predetermined value 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**.

Settings	
Number	31100
Type	Gift card
Short name	\$10 Gift Card
Chit name	\$10 Gift Card
Chit name alternate	
Long name	\$10 Gift Card
Long name alternate	
Button image	None
Ask for description	<input type="checkbox"/>
Gift card action	<input checked="" type="radio"/> Activate card <input type="radio"/> Add value
Export ID	0

Assignments	
Tax group	None
Concept	None
Sales/retail category	Retail

Figure 5 Items - Item Tab

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. Type a **name**, such as '\$10 Gift Card.'
5. Select **Activate card** as the 'Gift card action.'
6. Under the 'Assignments' group bar, select the **appropriate tax group**.

Note

You must attach a tax record to all items. Generally, gift cards are not taxable items; therefore, select a tax record without a tax percentage. You may need to create a 'no tax' tax group, if one does not already exist.

7. Select **Retail** from the 'Sales/retail category' drop-down list.
8. Configure the **remaining options** for the gift card, as necessary.

9. Select the **Pricing** tab.

Pricing options	
<input checked="" type="checkbox"/> Eligible for fixed pricing	
Pricing method	Item Price
Default price	10.00

Figure 6 Items - Pricing Tab

10. Select **Item Price** as the 'Pricing method.'
11. Type the **predetermined amount** to designate for this gift card item, such as 10.00, in 'Default price.'
12. Click **Save**.
13. Repeat this **procedure** if you need to create additional gift cards with other predetermined values.
14. Exit the **Items** function or continue to the **next procedure**.

To create an item for adding a predetermined value to a 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**.

Settings	
Number	31102
Type	Gift card
Short name	\$10 GC Add
Chit name	\$10 GC Add
Chit name alternate	
Long name	\$10 GC Add Value
Long name alternate	
Button image	None
Ask for description	<input type="checkbox"/>
Gift card action	<input type="radio"/> Activate card <input checked="" type="radio"/> Add value
Export ID	0

Figure 7 Item Tab - Add Value

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. Type a **name**, such as '\$10 GC Add.'
5. Select **Add value** as the 'Gift card action.'
6. Under the 'Assignments' group bar, select the **appropriate tax group**.



Note

You must attach a tax record to all items. Generally, gift cards are not taxable items; therefore, select a tax record without a tax percentage. You may need to create a 'no tax' tax group, if one does not already exist.

7. Select **Retail** from the 'Sales/retail category' drop-down list.
8. Configure the **remaining options** for the gift card, as necessary.
9. Select the **Pricing** tab.



Figure 8 Pricing Tab - Add Value

10. Select **Item Price** as the 'Pricing method.'
11. Type the **predetermined amount** to designate for this gift card item, such as 10.00, in 'Default price.'
12. Click **Save**.
13. Repeat this **procedure** if you need to create additional items for adding other predetermined values.
14. Exit the **Items** function or continue to the **next procedure**.

To create an item for selling an open value 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**.

Settings	
Number	31108
Type	Gift card
Short name	Gift Card
Chit name	Gift Card
Chit name alternate	
Long name	Gift Card
Long name alternate	
Button image	None
Ask for description	<input type="checkbox"/>
Gift card action	<input checked="" type="radio"/> Activate card <input type="radio"/> Add value
Export ID	0

Assignments	
Tax group	None
Concept	None
Sales/retail category	Retail

Figure 9 Item Tab - Open Amount

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**.
4. Type a **name**, such as 'Gift Card.'
5. Select **Activate card** as the 'Gift card action.'
6. Under the 'Assignments' group bar, select the appropriate tax group.

Note

You must attach a tax record to all items. Generally, gift cards are not taxable items; therefore, select a tax record without a tax percentage. You may need to create a 'no tax' tax group, if one does not already exist.

7. Select **Retail** from the 'Sales/retail category' drop-down list.
8. Configure the **remaining options**, as necessary.

9. Select the **Pricing** tab.

The screenshot shows the 'Items' window with the 'Pricing' tab selected. The 'Item' dropdown is set to '31108 Gift Card Retail'. Below the tabs, the 'Pricing options' section is expanded, showing a table with the following data:

Pricing options	
Eligible for fixed pricing	<input type="checkbox"/>
Pricing method	Ask for Price

Figure 10 Pricing Tab - Open Amount - Ask for Price

10. Select **Ask for Price** as the pricing method.
11. Click **Save** and exit the **Items** function or continue to the **next procedure**.

To create an item for adding an open value to a 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**.

The screenshot shows the 'Items' window with the 'Settings' tab selected. The 'Item' dropdown is set to '31109 Gift Card ADD Retail'. Below the tabs, the 'Settings' section is expanded, showing a table with the following data:

Settings	
Number	31109
Type	Gift card
Short name	Gift Card ADD
Chit name	Gift Card ADD
Chit name alternate	
Long name	Gift Card ADD
Long name alternate	
Button image	None
Ask for description	<input type="checkbox"/>
Gift card action	<input type="radio"/> Activate card <input checked="" type="radio"/> Add value
Export ID	0

Below the 'Settings' section, the 'Assignments' section is expanded, showing a table with the following data:

Assignments	
Tax group	None
Concept	None
Sales/retail category	Retail

Below the 'Assignments' section, the 'Auto menu' section is expanded, showing a table with the following data:

Auto menu	
Priority	1 Highest

Figure 11 Item Tab - Open Amount - Add Value

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**.
4. Type a **name**, such as 'Gift Card ADD.'
5. Select **Add value** as the 'Gift card action.'

- Under the 'Assignments' group bar, select the appropriate tax group.



Note

You must attach a tax record to all items. Generally, gift cards are not taxable items; therefore, select a tax record without a tax percentage. You may need to create a 'no tax' tax group, if one does not already exist.

- Select **Retail** from the 'Sales/retail category' drop-down list.
- Configure the **remaining options**, as necessary.
- Select the **Pricing** tab.

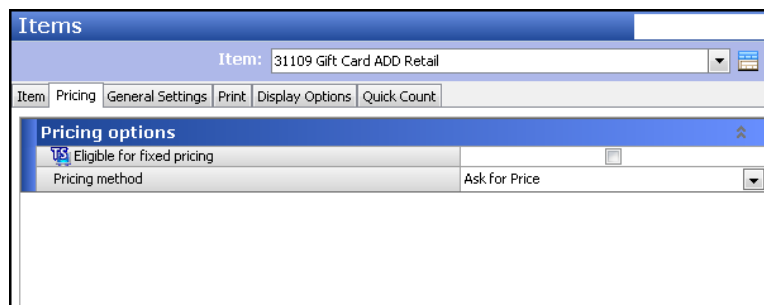


Figure 12 Pricing Tab - Open Amount - Ask for Price

- Select **Ask for Price** as the pricing method.
- Click **Save** and exit the **Items** function.

Adding gift card items to FOH for selling

After you create the necessary gift card items, you must add a button to the Front-of-House for each gift card item you create to allow you to sell and add gift card items to a guest check. For example, if you create an open value gift card item and allow guests to add value to an existing gift card, you need to add two buttons to the FOH, one for each item. The procedure to do this is different based on whether you use Table Service or Quick Service. For Table Service, you add a button for each item to a submenu; for Quick Service, you add a button for each item to a panel containing menu items.

To add gift card items to a Table Service submenu:

- Select **Maintenance > Menu > Submenus**.
- Select a **submenu** on which to add the gift card items from the 'Submenus' drop-down list. For example, 'Retail.'
- Select the **Layout** tab.

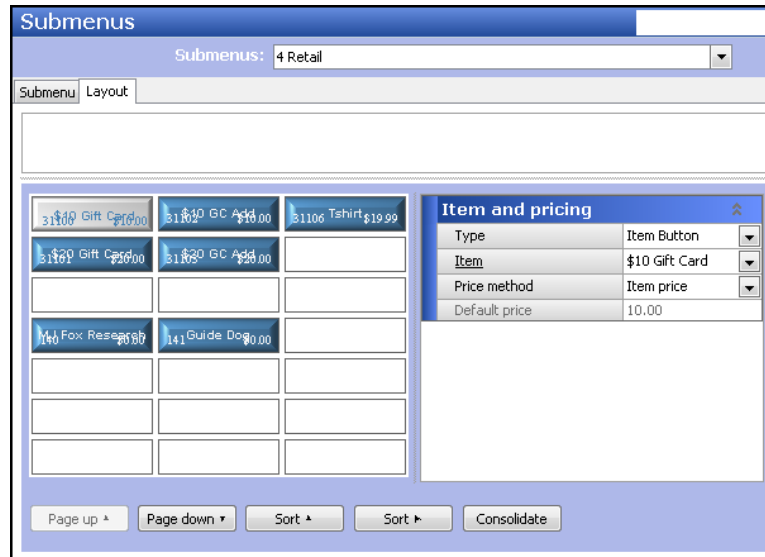


Figure 13 Submenus - Layout Tab

4. Double-click an **available position**.
5. Under the 'Item and pricing' group bar, select **Item Button** from the 'Type' drop-down list.
6. Select the **gift card**, such as '\$10 Gift Card,' from the 'Item' drop-down list.
7. Leave **Item price** selected in 'Price method.'
8. Click **Save**.
9. Repeat this **procedure** until you add all necessary gift card items, including the 'Add Value' gift card item.
10. Exit the **Submenus** function.

To add gift card items to a menu panel in Quick Service:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.
2. Select **Work with Panels**.
3. Select **Panel > Open Panel** and select a **panel** onto which to add the gift card buttons and click **OK**.

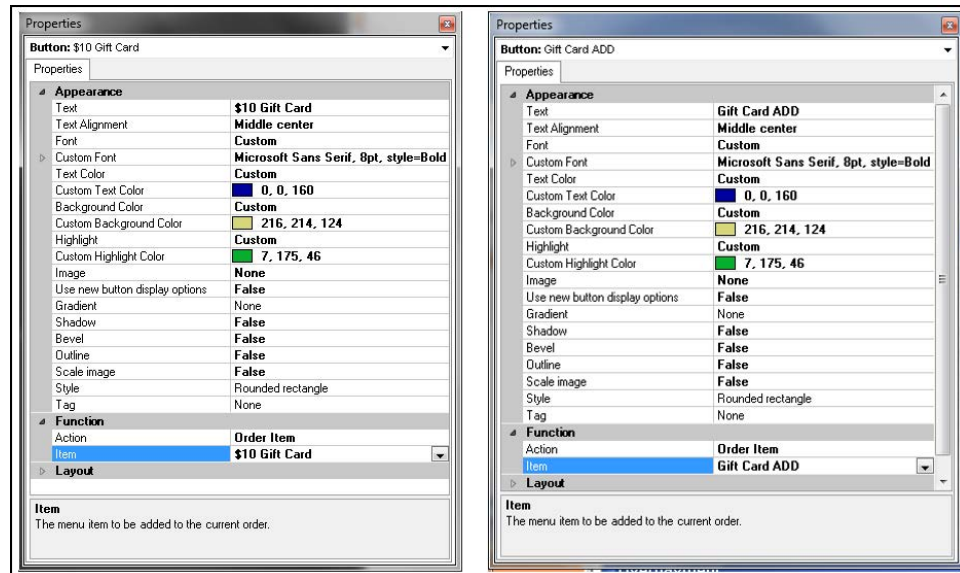


Figure 14 Quick Service Screen Designer

4. Select **Panel > New Button**. The Properties dialog box appears.
5. Under the 'Function' group bar, select **Order Item** from the 'Action' drop-down list.
6. Select a **gift card item** from the 'Item' drop-down list. The name of the item appears on the button.
7. Under the 'Appearance' group bar, type a **name** for the button, such as '\$10 Gift Card.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as '\$10\nGift Card.'
8. Configure the **remaining options** as you would for any other button.
9. Click **Save**.
10. Repeat this **procedure** until you add all necessary gift card items, including the Add Value gift card item.
11. Exit the **Screen Designer** function.

Creating credit card tenders for electronic payment processing

When using Aloha Payment Solutions to pass electronic payment data to and from the Aloha POS system, you need to set up a credit card tender for use when processing payment at the POS terminal. In Table Service, it is not necessary to use Screen Designer to add a tender button to the FOH, as this screen is hard-coded and selecting a button position takes care of this for you; however, if you are using Quick Service, you must add a button to a panel containing your tenders.

To create a credit card tender for electronic payment processing:

1. Select **Maintenance > Payments > Tenders**.
2. Click the **New** drop-down arrow, select **Credit card** from the 'Type' list box, and click **OK**.
3. Under the 'Settings' group bar, 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**.

The screenshot shows the 'Tenders' configuration window with the 'Settings' tab selected. The tender name is 'GP CC Credit card'. The 'Number' field is set to '8'. The 'Type' is 'Credit card'. The 'Button position' is set to 'Row 11, Column 1'. The 'Active' checkbox is checked. The 'Overpayment' section has 'Allow overpayment' checked and 'Provide change' checked. The 'Tips' section has 'Allow tips' checked, 'Maximum tip %' set to 20.00, and 'Tip refund %' set to 100.000000.

Setting	Value	Checkbox
Number	8	...
Name	GP CC	
Type	Credit card	
First available button position		<input type="checkbox"/>
Button position	Row 11, Column 1	...
Button image	None	
Report as	Current	
Default amount behavior	Ask for amount	
Active		<input checked="" type="checkbox"/>
Track		<input type="checkbox"/>
Can refund		<input checked="" type="checkbox"/>
Affect deposit		<input type="checkbox"/>
Print check on close		<input checked="" type="checkbox"/>
Open drawer on close		<input type="checkbox"/>
Print signature line		<input type="checkbox"/>
Combine on check		<input type="checkbox"/>
Close check upon payment		<input type="checkbox"/>
Do not verify amount		<input type="checkbox"/>
Overpayment		
Allow overpayment		<input checked="" type="checkbox"/>
Limit by percent		<input type="checkbox"/>
Excess amount	0.00	
Manager can always overpay		<input type="checkbox"/>
Provide change		<input checked="" type="checkbox"/>
Tips		
Allow tips		<input checked="" type="checkbox"/>
Maximum tip %	20.00	
Tip refund %	100.000000	
Remove tip line if auto gratuity		<input type="checkbox"/>

Figure 15 Tenders - Tender Tab

4. Type a **name** for the tender, such as 'GP CC.'
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 tender.

Note

In Table Service, it is not necessary to use Screen Designer to add a tender button to the FOH, as this screen is hard-coded and selecting a button position takes care of this for you; however, for Quick Service, you must add a button to a panel containing your tenders.

6. Select the **tender** under which you want the credit card tender 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** in 'Report as.'
7. Select **Ask for amount** from the 'Default amount behavior' drop-down list.
8. 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.
9. Select **Print check on close** to print a copy of the guest check when you close a check using this tender.
10. Under the 'Tips' group bar, select **Allow tips** to allow guests to add a tip to the guest check.
11. 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.
12. Select the **Type** tab.

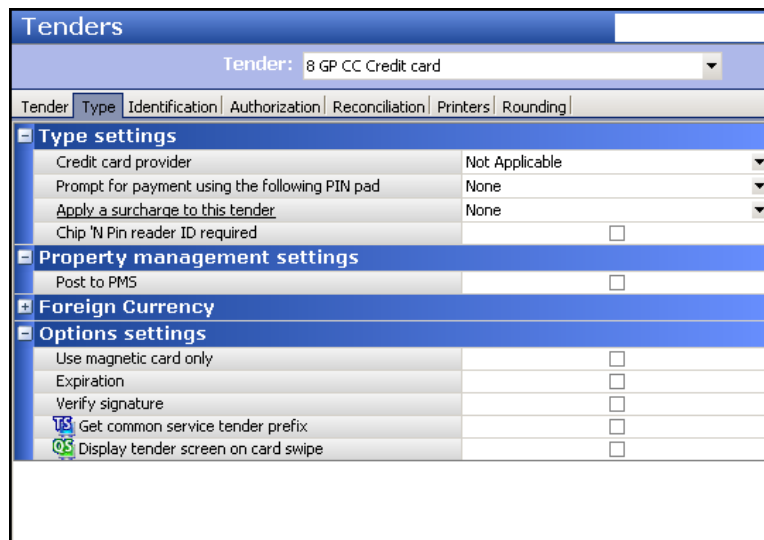


Figure 16 Tenders - Type Tab

13. Select **Not Applicable** from the 'Credit card provider' drop-down list.
14. Select the **Authorization** tab.

15. Select **Require authorization** to display additional options.
16. Select **Authorize using EDC**. (Required)
17. Configure the **remaining options** in the usual manner.
18. Click **Save** and exit the **Tenders** function.

Adding the GP CC credit card button to a panel (QS only)

In Quick Service environments, you must configure the credit card button to appear on the Tender screen. We recommend you script the button to chain back to an open check.

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.
2. Select **Work with Panels**.
3. Select **Panel > Open Panel**, select a **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.

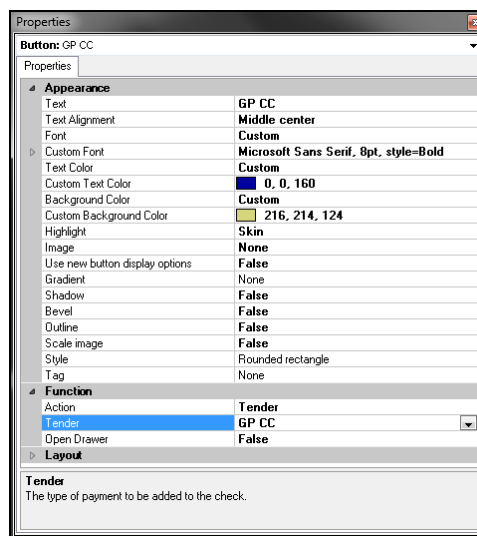


Figure 17 Properties Dialog Box

5. Under the 'Function' group bar, select **Tender** from the 'Action' drop-down list.
6. Select the **credit card tender created for Global Payments** from the 'Tender' drop-down list.
7. Select **True** from the 'Open Drawer' drop-down list, if necessary.
8. Under the 'Appearance' group bar, type a **name** for the button, such as 'GP CC.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as 'GP\nCC.'
9. Configure the **remaining options** as you would for any other button function.
10. Select **Panel > Save Panel**.
11. Select **File > Exit** to exit **Quick Service Screen Designer**.

Adding a pre-authorization button to the close screen (TS only, optional)

In Table Service environments, you can configure a pre-authorization button to appear on the 'Close' screen. If a bartender uses the pre-authorization button to begin a check, the 'Close pre-auth' button must be used to close the transaction.

To add a pre-authorization button to the Close screen:

1. Select **Maintenance > Payments > Tenders**.
2. Click the **New** drop-down arrow, select **Credit card** from the 'Type' list box, and click **OK**.

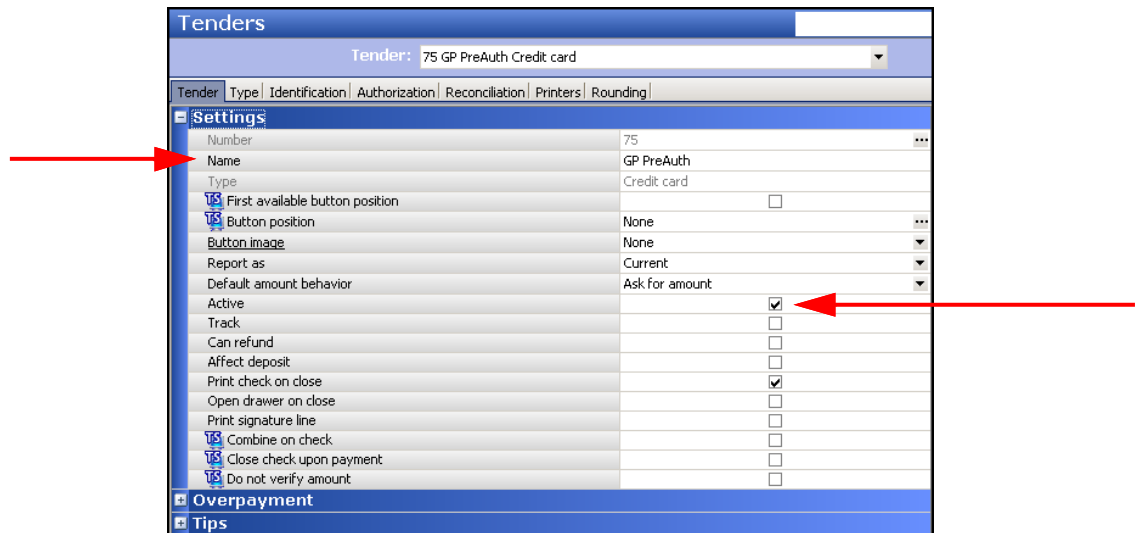


Figure 18 Tenders - Tender Tab

3. Under the 'Settings' group bar, type a **name** to identify the tender, such as 'GP PreAuth.'
4. Select **Active** to make the tender available for use.
5. Leave the **First available button position** and **Button position** options cleared. If you select either choice, the tender acts as authorization and not as a pre-authorization.
6. Select the **Type** tab.

The screenshot shows the 'Tenders' configuration window for '75 GP PreAuth Credit card'. The 'Type' tab is selected. Under 'Type settings', the 'Credit card provider' is set to 'Not Applicable'. Other settings include 'Prompt for payment using the following PIN pad' (None), 'Apply a surcharge to this tender' (None), and 'Chip 'N Pin reader ID required' (checkbox). Under 'Property management settings', 'Post to PMS' is unchecked. Under 'Foreign Currency', 'Foreign currency' is set to 'None'. Under 'Options settings', 'Use magnetic card only', 'Expiration', 'Verify signature', 'Get common service tender prefix', and 'Display tender screen on card swipe' are all unchecked.

Figure 19 Tenders - Type Tab

7. Select **Not Applicable** from the 'Credit card provider' drop-down list.
8. Select the **Authorization** tab.

The screenshot shows the 'Tenders' configuration window for '75 GP PreAuth Credit card' with the 'Authorization' tab selected. Under the 'Authorization' group bar, 'Require authorization' is checked. 'Authorization prompt' is set to '0'. 'Print on check' is unchecked. 'Authorize using EDC' and 'Allow pre-auth with EDC' are checked. 'Do not print vouchers' and 'Apply signature line rules for vouchers' are unchecked.

Figure 20 Tenders - Authorization Tab

9. Under the 'Authorization' group bar, select **Require authorization**.
10. Select **Authorize using EDC** to electronically return an authorization code.
11. Select **Allow pre-auth with EDC** to electronically return an authorization code for pre-authorizations.
12. Click **Save** and exit the **Tenders** function.

Refreshing data

After all settings are in place in Aloha Manager, it is necessary to select Utilities > POS > Refresh All POS Data 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. If you run the refresh prior to the EOD process, select

'Automatically restart all 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.

Configuring Aloha Payment solutions

This section details the configuration requirements for Aloha Payment Solutions (APS). If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Aloha Payment Solutions Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	Install and configure the Aloha Payment Solutions . See page 24 .
2.	Configure the Global Payments plugins for APS . See page 29 .
3.	Configure the Ingenico Desk/5000 payment terminal . See page 31 .

Install and configure the Aloha Payment solutions

Downloading and installing the Aloha Payment Solutions is a multi-step process. Begin by using the Radiant Update website to download APS, and then install the APS service. After installation, configure APS, the plug-ins, and values.

To install Aloha Payment Solutions:

1. Access **Aloha Update** by logging in to the **Radiant Update website** (randiantupdate.com).
2. Select **Download Install CD**.
3. Select **Aloha Payment Solutions** from the 'Application Suite' drop-down list.
4. Select the **latest version available** from the 'Major Version' drop-down list.
5. Click **Download Now** and save ApsExternalApiClientRelease_x.x.zip file to a staging folder of your choosing.
6. Use **File Explorer** to browse to the **staging folder**.
7. Double-click **APS_Release_x.x.x.zip** to open the file.

8. Double-click **AlohaPaymentSolutionssetup.exe**.

NCR Aloha Payment Solution

Use SQL database

Database Server Address: 192.168.13.1

Database Instance Name: SQLEXPRESS

Database Name: ps

Use default Windows user for DB connection

Username: [Redacted]

Password: [Redacted]

Connection to DB succeeded

Cancel WARNING! Aloha and all terminals will be stopped during installation Next

Figure 21 Use SQL Database



Note

If the server has multiple Network Interface Cards (NICs), use the server name itself in 'Database Server Address.'

9. Select **Use SQL database**. If you clear this option, (1) you must use the same terminal where the payment was applied to void the payment; (2) Preauthorization, incremental authorization, and preauthorization completion do not work properly; and (3) APS reporting functionality is limited. Contact the international team for more information.
10. Select the **BOH computer name** from the 'Database Server Address' drop-down list.
11. Click **Next**. The 'Select plugin' window appears.

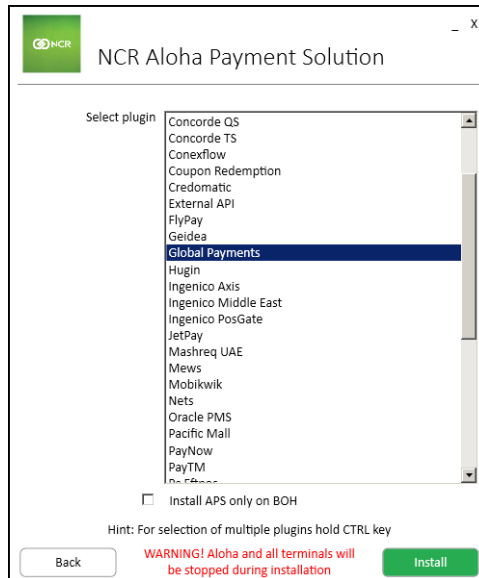


Figure 22 Select Plugin

12. Select **Global Payments**.
13. Click **Install**. The installation status window appears.

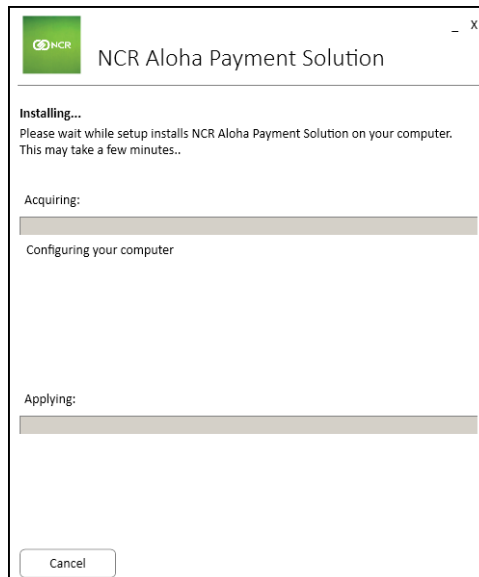


Figure 23 Installation Wizard Window

14. Allow the **installation** to complete.

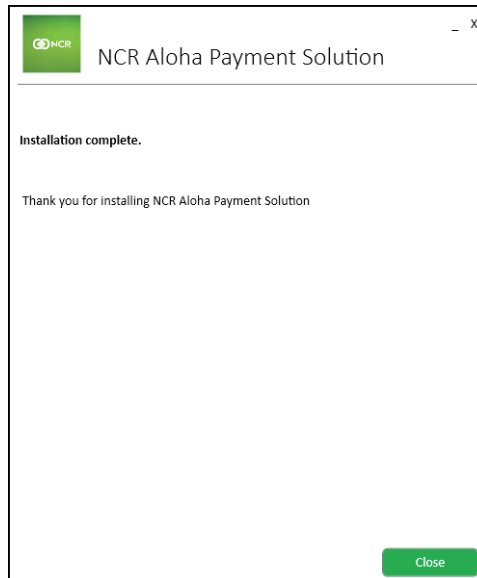


Figure 24 Installation Complete Window

15. Click **Close** to exit the installation.

To configure Aloha Payment Solutions:

1. Go to **Start > APS > NCR APS Configuration**. The APS Management screen appears.

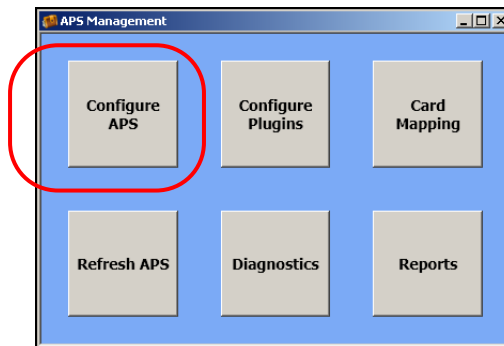


Figure 25 APS Management Screen

2. Double-click **Configure APS**.

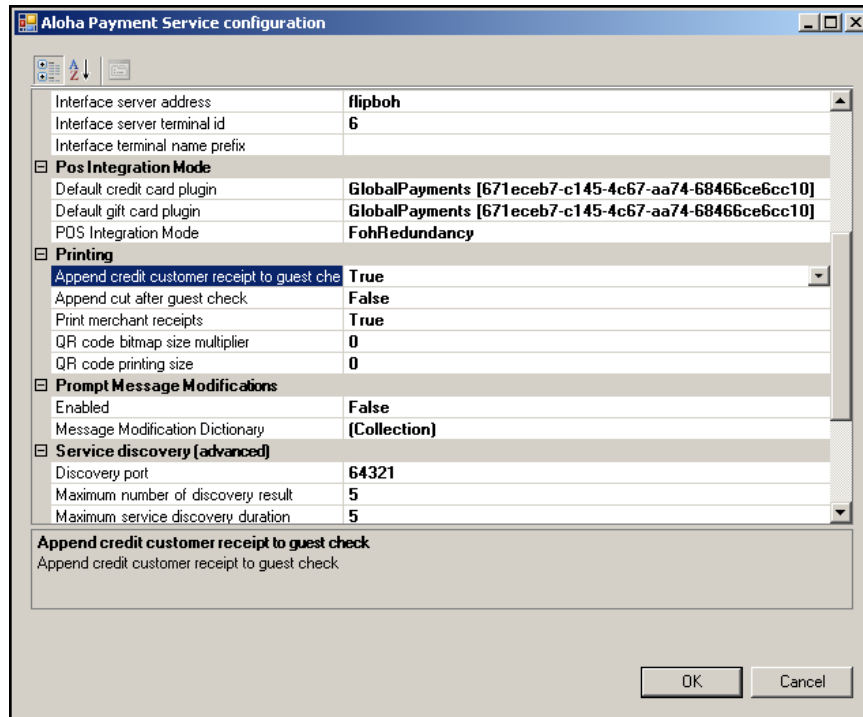


Figure 26 Aloha Payment Service Configuration

3. Under the 'Pos Integration Mode' group bar, select **Global Payments** from the 'Default credit card plugin' drop-down list.
4. Select **Global Payments** from the 'Default gift card plugin' drop-down list.
5. Select **FohRedundancy** from the 'POS Integration Mode' drop-down list.
6. Click **OK** to return to the APS Management screen.

To configure the Global Payments plugin for APS:

1. With the APS Management screen active, double-click **Configure Plugins**.

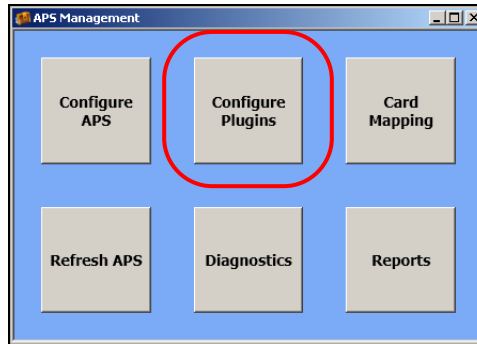


Figure 27 APS Management Screen

The Plugin Configuration screen appears.

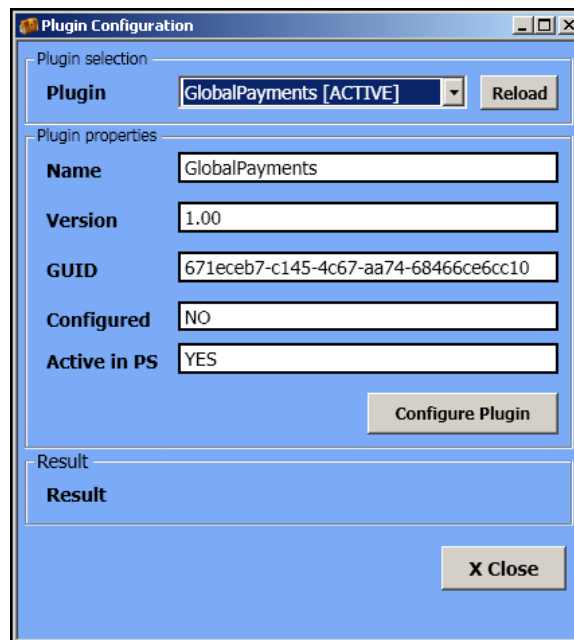


Figure 28 Plugin Configuration Screen

2. Select **GlobalPayments [ACTIVE]** from the 'Plugin' drop-down list. The Plugin properties populate, including the GUID.
3. Click **Configure Plugin**. The 'GlobalPayments plugin configuration' screen appears.

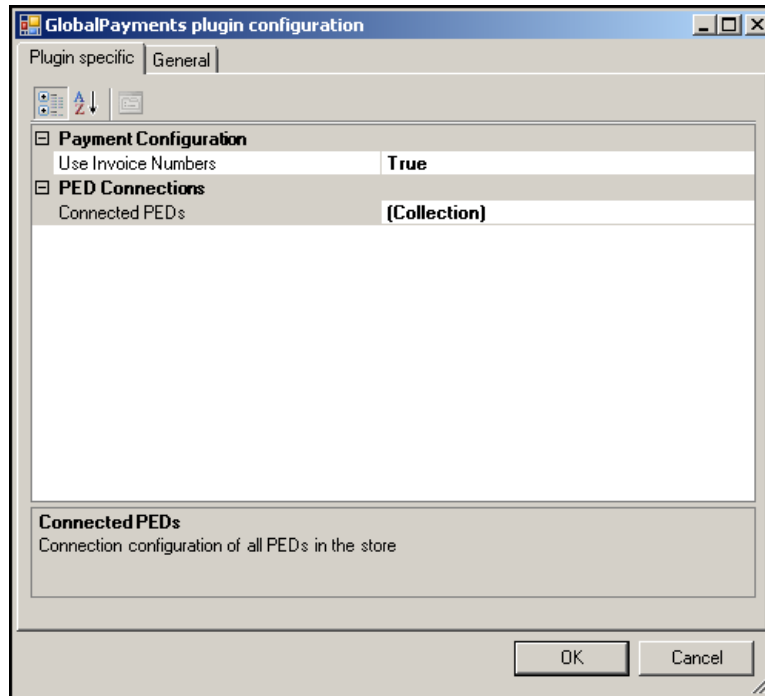


Figure 29 GlobalPayments Plugin Configuration

4. Under the 'Payment Configuration' group bar, select True for 'Use Invoice Numbers.' The GlobalPaymentsPedConfiguration Collection Editor screen appears.

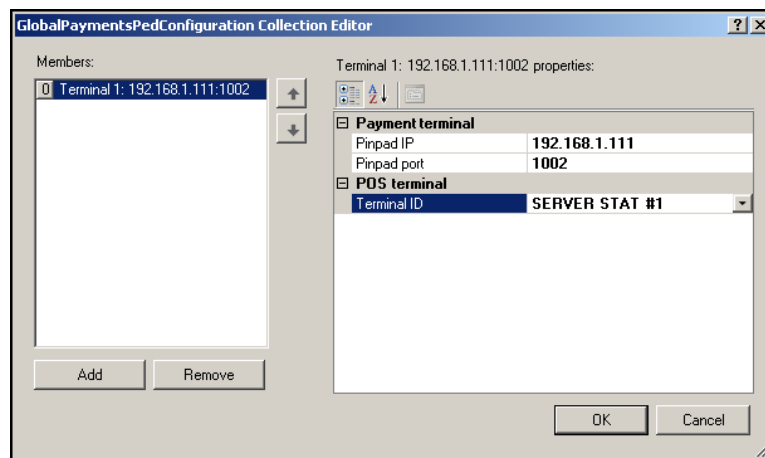


Figure 30 GlobalPaymentsPedConfiguration Collection Editor

5. Under 'Members,' click **Add** to add a terminal.
6. Under the 'Payment terminal' group bar, type the **IP address** of the payment terminal.
7. Type the **network port** of the payment terminal.

8. Under the 'POS terminal' group bar, select the **terminal**.
9. Repeat this **procedure** for each payment device to configure.
10. Click **OK**.
11. Click **OK** and exit the **APS Management** function.

Configuring the Ingenico Desk/5000 payment terminal

The Ingenico Desk/5000 payment terminal allows you to select options either by using the keypad or the touch screen.



Note

You must obtain the user name and password from your provider.



Figure 31 Ingenico Desk/5000 Payment Terminal

To configure the Ingenico Desk/5000 payment terminal:

1. Press the **Admin** button to access configurations.
2. Touch **MISC Options > semi-integrated > enable semilnteg** and touch or press **ON**.
3. Touch **MISC Options > semin-integrated > communication type** and touch or press **Ethernet**. When it asks for the port, use the same port as in the APS configuration section.
4. Touch **MISC Options > semi-integrated > receipt options** and touch or press **Terminal**.
5. Go to **Setup Menu**.
6. Select **Communications > Ethernet > Ethernet Setup** and touch or press either **dynamic** or **static IP**, depending upon your business needs.
7. Go to **Setup Menu**.
8. Select **Trans Options > Credit > Fraud** and select how to **verify the card**.

9. Go to **Setup Menu**.
10. Select **Trans Options > Prompts > Invoice #**. This should match APS plugin configuration.
11. Go to **Setup Menu**.
12. Select **Trans Options > Tip Options** and set up your **tip options**.

Using Global Payments

The Ingenico Desk/5000 payment terminal allows your guests to slide, tap or insert the chip-enabled card.

Sale with tip included

1. Enter a sale. The guest check amount appears on the payment terminal.

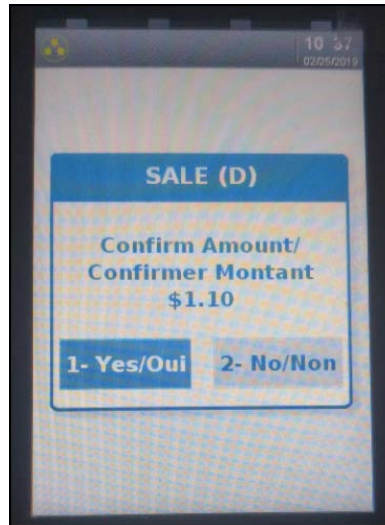


Figure 32 Confirm Amount

2. The guest touches **1** using the keypad or **1-Yes/Oui** on the touch screen to confirm the amount of the guest check.

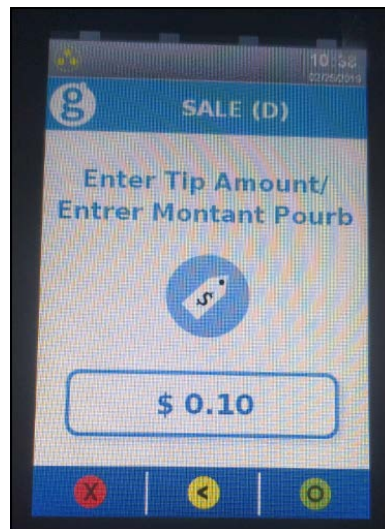


Figure 33 Enter Tip Amount

- Using the keypad, the guest enters a **tip amount**, such as \$0.10.
- The guest touches **1-Accept** or the **green button** on the keypad to accept the sale.

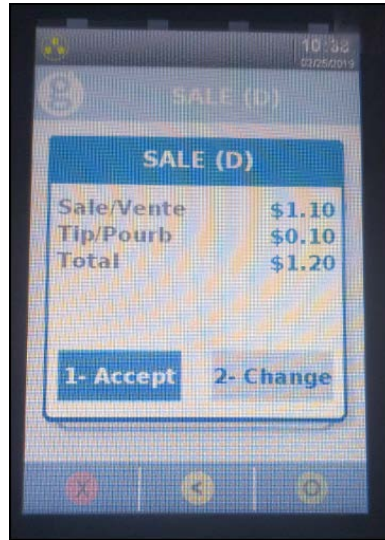


Figure 34 Accept Sale

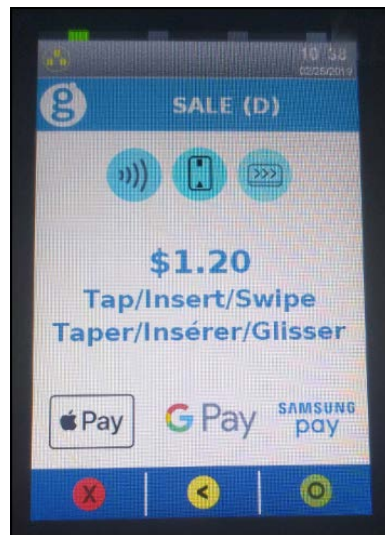


Figure 35 Insert, Tap, or Slide Card

- The guest inserts, taps, or slides the **debit, credit, or gift card** into the Ingenico Desk/5000 payment terminal.

The payment terminal connects, transmits, and then receives confirmation.

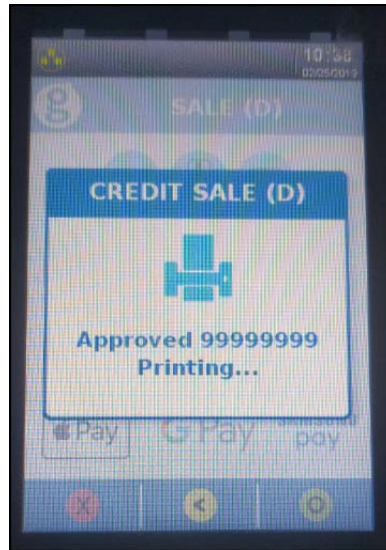


Figure 36 Print Guest Receipt

The guest receipt prints from the payment terminal.

Refunds

This section shows you how to perform a refund. The server or cashier selects Refund.

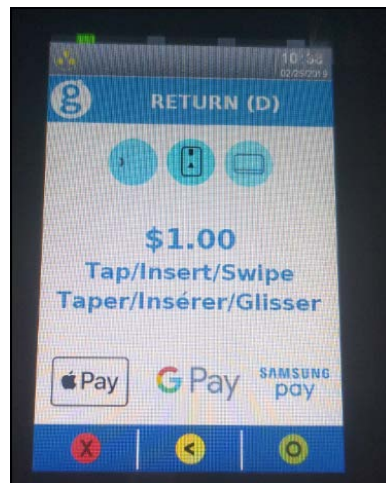


Figure 37 Insert, Tap, or Slide Card

1. The guest inserts, taps, or slides the **debit, credit, or gift card** into the Ingenico Desk/5000 payment terminal.

The payment terminal connects, transmits, and then receives confirmation, and then receives an approval and asks for a signature from the guest.

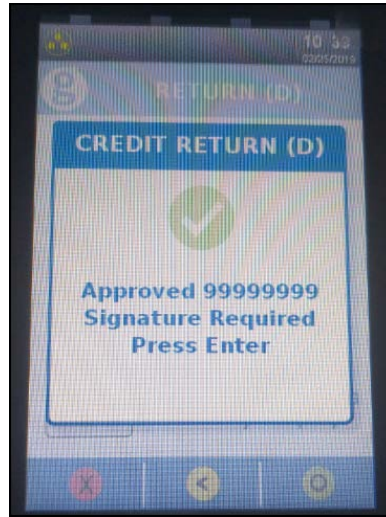


Figure 38 Press Enter Screen

2. The guest presses **Enter** to complete the transaction.

Sale and void

This section show you how to perform a sale and void. The guest confirms the sale, enters a tip, and inserts their card.

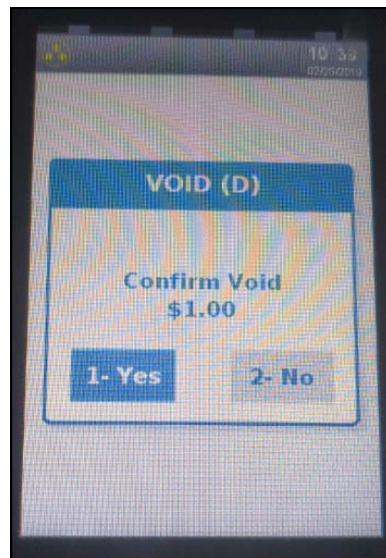


Figure 39 Void Screen

1. While the card is still in the Ingenico Desk/5000 payment terminal, touch **1-Yes** to confirm the void or touch **2-No** to cancel the void.

The payment terminal transmits the request, and then approves the transaction.

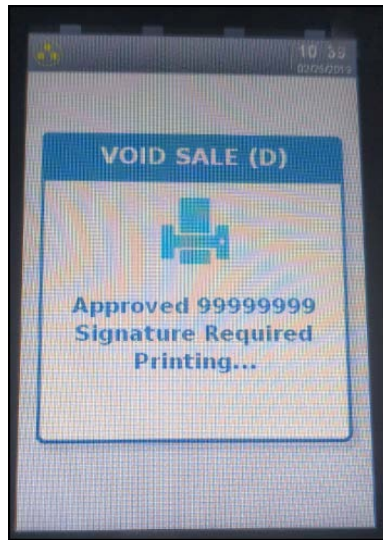


Figure 40 Signature Required Screen

The guest receipt prints from the payment terminal.

2. The guest signs the **receipt**.

Settlement

Use the Ingenico Desk/5000 payment terminal to settle (close) a batch and deposit funds.

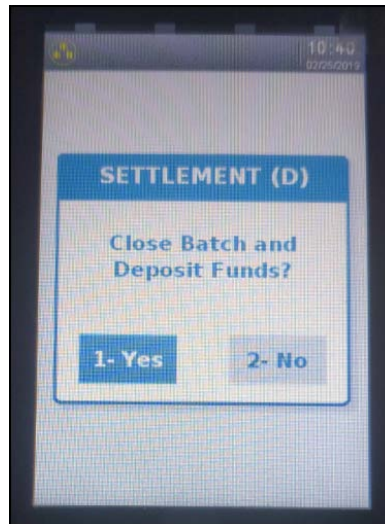


Figure 41 Close Batch - Deposit Funds

1. Touch **1-Yes** to close the batch and deposit funds. Touch **2-No** to cancel.

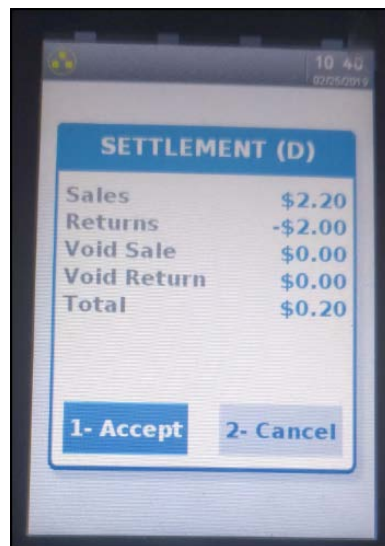


Figure 42 Information Screen

2. Touch **1-Accept** to continue, or touch **2-Cancel** to cancel the settlement.



Figure 43 Connected Screen

The Ingenico Desk/5000 payment terminal connects and accepts the settlement.

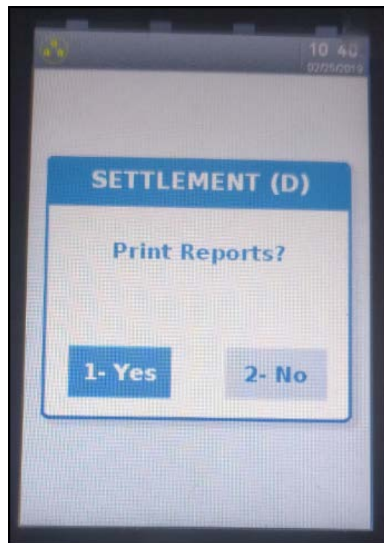


Figure 44 Print Reports

3. Touch **1-Yes** to print the reports or **2-No** to cancel.

Troubleshooting Global Payments

The following are helpful hints and troubleshooting tips provided for Global Payments.

SQL installation errors

If a SQL Server 2005 installation fails, you must:

1. Navigate to **Add/Remove Programs** in Control Panel and uninstall all SQL-related components that may still be there from the previous installation.
2. When that task is complete, open and log in to the **website**: <https://www.radiantupdate.com>.

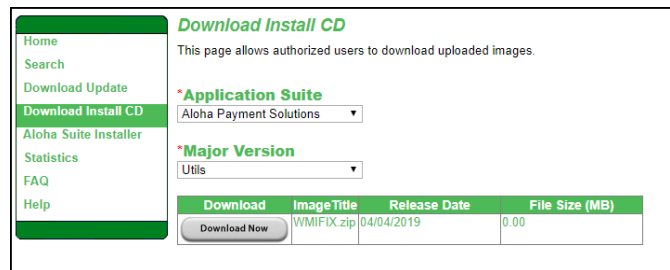


Figure 45 WMIFIX.zip

3. Click **Download Install CD** on the menu.
4. Select **Aloha Payment Solutions** from the 'Application Suite' drop-down list.
5. Select **Utils** from the 'Major Version' drop-down list.
6. Click **Download Now** to download and save WMIFIX.zip to a staging directory on the machine running SQL server.
7. Navigate to the **staging directory**, double-click **WMIFIX.zip**, and run **WMIFIX.bat** on the target computer.
8. Attempt the **SQL installation** again.

SQL not configured properly

If the SQL error '26' appears during the installation of Aloha Payment Solutions (APS), it could be one of two issues:

- 1) The SQL Server Browser Service is not started. Navigate to **Services** in Control Panel, locate and select **SQL Server Browser** in the list and click **Start the service**.

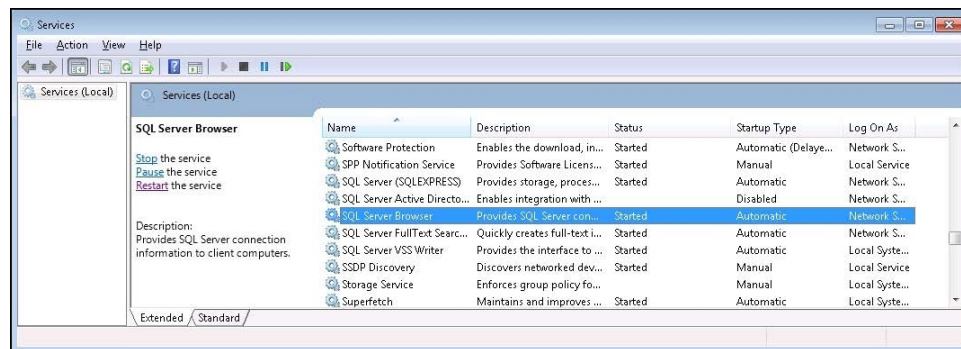


Figure 46 SQL Server Browser

- 2) The network protocols are not enabled.
 - a. Navigate to the **Control Panel** and select **Admin tools > Computer Management**.
 - b. At the Computer Management window, select **Services and Applications**.
 - c. Under 'Services and Applications,' select **SQL Server Configuration Manager**.
 - d. Select **Protocols for SQLEXPRESS**.

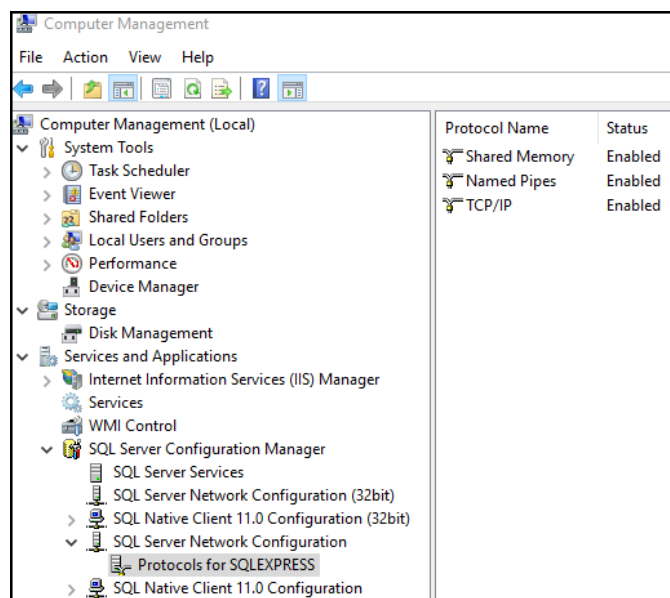


Figure 47 SQL Server Configuration Manager

- e. Configure the **network protocols** as shown in [Figure 47](#).
- f. Exit **Computer Management**.

SQL and opened ports

If you need to connect to a remote MSSQL server that uses a firewall, you must define the following exceptions in the firewall configuration:

- Allow inbound connections on TCP port 1433, which is the default port for MSSQL. You can change this in MSSQL config.
- Allow inbound connections on UDP port 1434.
- Add exception for the SQL Server (SQLServr.exe) program.

Locate the binary, found in the %ProgramFiles%\Microsoft SQL Server\ folder.

The UDP port 1434 is required if the APS database is implemented as a named SQL instance (which is usually the case for SQL Express Server.)



Reference

Refer to [http://msdn.microsoft.com/en-us/library/ms175483\(v=sql.90\).aspx](http://msdn.microsoft.com/en-us/library/ms175483(v=sql.90).aspx) and [http://technet.microsoft.com/en-us/library/ms165614\(v=sql.90\).aspx](http://technet.microsoft.com/en-us/library/ms165614(v=sql.90).aspx) for more details.

Global Payments, Feature Focus Guide

NCR Voyix 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:
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