Feature Focus Guide:
Store and Forward

Core Product: Aloha Quick Service, Aloha Table Service
Last Updated: June 14, 2024

Contents

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Revision Record

Date	Version #	Description
Prior to 05/13/2022	QS or TS v6.7+ EDC v14.1	Implemented the Store and Forward feature.
05/13/2022		Converted document to use new templates.
01/13/2023		Updated front cover and back page to reflect new NCR branding.
06/14/2024		Updated document to reflect NCR Voyix branding.

About Store and Forward

Store and Forward (SAF) at a Glance	
Core Product	Aloha Quick Service, Aloha Table Service, Aloha EDC
Complementary Products	No
Separate License Required?	No
Other References	Aloha Quick Service Manager Guide, Aloha Table Service Manager Guide, Aloha EDC User Guide

When Aloha® EDC attempts to authorize a transaction and EDC is unable to connect to the processor for some reason, it can take up to 45 seconds or longer before receiving a response. In a busy environment, these processing delays impact the speed of service. Store and Forward (SAF) allows you to set a timeout threshold, such as 10 seconds, for an authorization to occur. If EDC is not able to connect and receive a response from a processor within the allotted time frame, the system places that processor into the 'store and forward' state, meaning the system approves the transaction amount, if it is within the defined limits, stores the transaction, and attempts to authorize it again at a later time. EDC continues to provide immediate responses for subsequent transactions within the defined limits until it is able to re-establish a connection to that processor. Once successfully reconnected, Aloha EDC processes the stored transactions in the queue.

> **Note**
>
> When the connection between the Aloha Point-of-Sale (POS) system and EDC fails, the system uses Spooling, which you enable by selecting 'Allow authorization when EDC is offline' in Store Settings > Credit Card group > EDC Setup group bar; however, when the connection between the POS system and EDC is fine, but the connection between EDC and a processor is down, Store and Forward kicks in and EDC goes into the 'store and forward' state for that processor only. Authorizations for processors not in the 'store and forward' state continue as usual.

The system stores all credit card transactions within the defined limits in the queue while the processor is in the 'store and forward' state. Store and Forward supports MasterCard, Visa, Discover, JCB, Diners Club, and American Express.

If you use the same processor for credit card and gift card transactions, the system stores all credit card transactions within the defined limits in the queue but all gift card transactions automatically decline while the processor is in the 'store and forward' state.

If you use a different processor for credit cards than you do for gift cards, and your credit card processor is in the 'store and forward' state, gift card transactions continue to authorize as long as EDC can connect to your gift card processor.

All debit cards processed as true debit cards, not as credit cards, automatically decline while the processor is in the 'store and forward' state.

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Store and Forward does not support EBT cards.

> **Note**
>
> If you process gift card transactions with a processor that allows offline gift cards, and you configure the processor for offline gift cards, Store and Forward stores the gift card transaction for authorization at a later time, the same as it does for credit card transactions; however, configuring your system to authorize gift cards offline is a risk you want to consider carefully.

Configuring Store and Forward

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

Store and Forward Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	In the Configuration Management tool, either Aloha Manager or Aloha Configuration Center, access **Maintenance > Electronic Draft Capture > EDC Settings** in Aloha POS system to enable and configure the Store and Forward feature. See page 7.
2.	In the Configuration Management tool, either Aloha Manager or Aloha Configuration Center, access **Maintenance > Labor > Security Roles** to allow access to the Store and Forward Transaction List function, and the Attempt Recovery button, available in this same function for any employee with proper access. See page 8.
3.	Access **Utilities > POS > Refresh POS & All Installed Products** to refresh your POS system. See page 9.

Enabling Store and Forward

You must enable Store and Forward to view the additional configuration options and define the timeout threshold at which to store a transaction for processing at a later time.

To enable Store and Forward:

1. Select **Maintenance > Electronic Draft Capture > EDC Settings**.

Figure 1 Electronic Draft Capture - EDC Settings

2. Under the 'Store and forward' group bar, select **Enable store and forward** to enable the Store and Forward (SAF) feature. If EDC does not receive an authorization from the processor within the alloted time frame, the system provides a premature authorization and stores the transaction. EDC continues to provide authorizations for each additional Front-of-House (FOH) transaction until it is able to reconnect to the processor, at which time Aloha EDC processes the stored transactions in the queue.

3. Type the **number of seconds**, from zero to 30, allowed to attempt to authorize a transaction.

> ⚠️ **Caution**
>
> If your store uses a slow wireless or dial-up connection, we recommend setting a longer timeout threshold to handle slower transaction processing; otherwise, you risk the processor going in and out of the 'store and forward' state throughout the day.

4. Type the **number of seconds** to wait before attempting to authorize the oldest transaction placed in the queue by Store and Forward.

5. Type the **dollar amount** above which the system will not 'store and forward' the transaction, in 'Floor for transaction amount.' If EDC does not receive an authorization before the allotted time frame for a transaction greater than this amount, the system declines the transaction. If you define the floor limit as zero, the system allows EDC to 'store and forward' any transaction amount.

6. Type the highest number of transactions, per processor, to allow EDC to 'store and forward' in 'Maximum number of offline transactions.'

7. Click **Save** and exit the **EDC Settings** function.

Providing access to Store and Forward

You must have a sufficient security role to access Store and Forward functions available in EDC.

To provide access to Store and Forward functions:

1. Select **Maintenance > Labor > Security Roles**.

2. Select the **security role** to which you want to allow access to Store and Forward functions from the drop-down list.
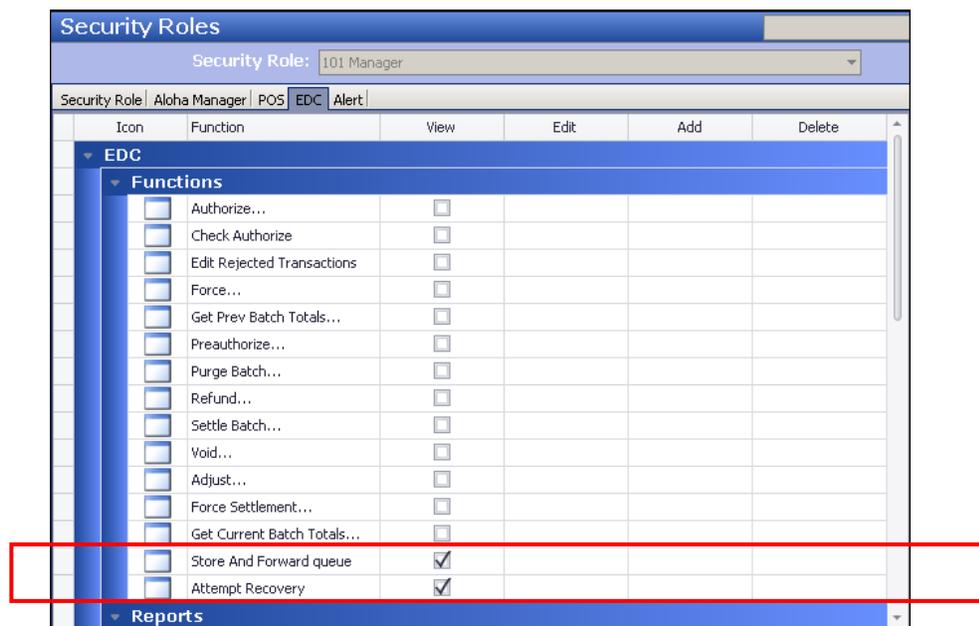
3. Select the **EDC** tab.

Figure 2 Labor - Security Roles

4. Under the 'Functions' group bar, select **Store And Forward queue** which allows you to view the Store and Forward Transaction list in Aloha EDC from the Functions > Store And Forward menu option.

5. Select **Attempt Recovery** to allow the security role access to the Attempt Recovery button.

> 📝 **Note**
> If Aloha EDC is in the process of authorizing transactions in the Store and Forward transaction queue, the system disables the Attempt Recovery button.

6. Click **Save**.
7. Repeat this **procedure** for any other security role requiring access to Store and Forward functions.
8. Exit the **Security Roles** function.

Refreshing the data

After all settings are in place in Aloha Manager, you must 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. 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.

Using Store and Forward

To check the status of a processor, navigate to Aloha EDC. Locate the status of each processor under the 'Connection Status' heading.

Store and forward — Appears for each processor currently in the 'store and forward' state.

Recovery / Attempting to Recover / Recovering — Appears under each processor once EDC is able to re-establish a connection with the processor. The status remains in 'Recovery' until the system authorizes all Store and Forward transactions for that processor and the processor is back online.

Idle — Appears under each processor that is online, but not in use.

Disconnected — Appears under each processor to which EDC does not currently have an active connection.

Authorizing — Appears under each processor in the process of authorizing a transaction.

Stopped — Appears under each processor for which you manually ended a connection in Aloha EDC Client.

Figure 3 Processor Status

Using EDC functions when processor in Store and Forward state

The following error message appears only on the Back-of-House (BOH) when a manager attempts a BOH EDC function, (such as authorize, adjust, force, refund, void, or settle batch) on a processor that is in the 'store and forward' state. **Note:** EDC BOH functions are available when one processor is in the 'store and forward' state and another processor is online.

Figure 4 BOH EDC Function - Error Message

Using the Store and Forward transaction list

The first time an authorization fails due to a lost connection between Aloha EDC and a processor, EDC places the processor in the 'store and forward' state. Aloha EDC continues to attempt authorization for all other processors not in the 'store and forward' state.

The Store and Forward Transaction List dialog box, available on the Functions menu in EDC, lists all transactions currently in the 'store and forward' state. Once a transaction authorizes, the system removes it from this list.
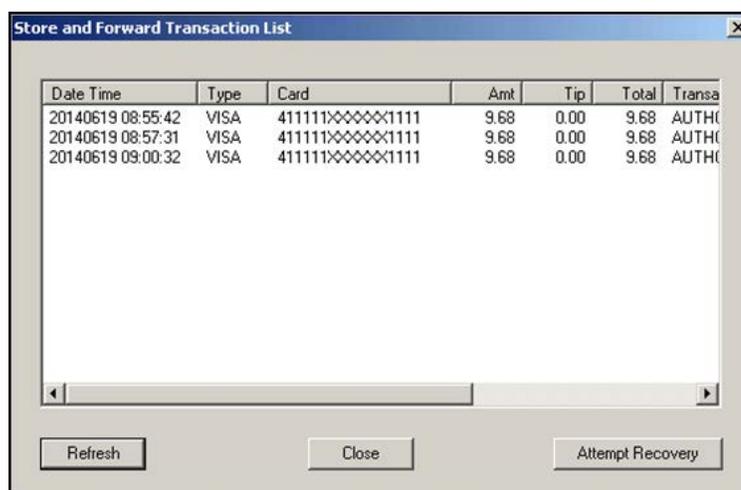

Figure 5 Attempt Recovery and Refresh Buttons

Performing a manual recovery

The Attempt Recovery button, located on the Store and Forward Transaction List dialog box, allows you to attempt to authorize the oldest queued transaction, followed by the remaining transactions. Touching the Attempt Recovery button overrides the time limit to authorize the oldest queued transaction and attempts the authorization immediately.

If the transaction authorizes successfully, Aloha EDC processes the remaining transactions before showing an 'Online' status. If Aloha EDC is in the process of recovering, either because you selected the Attempt Recovery button or the allotted time frame before recovery has expired, the Attempt Recovery button is not available.

Updating the Store and Forward queue

The Store and Forward queue does not update automatically. To update the current list of Store and Forward transactions, touch Refresh on the Store and Forward Transaction List dialog box. The current list of Store and Forward transactions appear in the queue.

Reporting Store and Forward

A '~' identifies Store and Forward transactions on the EDC reports containing both Spooled and Store and Forward transactions.

Troubleshooting Store and Forward

We offer the following helpful hints and troubleshooting tips for the Store and Forward feature.

Timeout Threshold Value

If your store uses a slow wireless or dial-up connection, we recommend setting the authorization timeout threshold to a longer timeout value, or leave it at zero, to handle slower transaction processing; otherwise, you risk the processor going in and out of the 'store and forward' state throughout the day.

Offline Gift Cards

Currently, there are a few processors that support processing gift cards offline. For those gift card transactions, the transaction is not immediately declined while in the 'store and forward' state; instead the transaction processes offline, per existing functionality.

Store and Forward, 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: Documentation.HSR@NCRVoyix.com