Feature Focus Guide: Valutec Gift Cards

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 12/15/2022	v14.1+	Implemented support for Valutec gift cards.
	v14.1+	Added Troubleshooting section.
01/25/2023		Converted the document to use new templates. Updated the front cover and back page to reflect new NCR branding.
06/14/2024		Updated document to reflect NCR Voyix branding.

About Valutec Gift Cards

Valutec Gift Cards 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 Table Service Reference Guide, Aloha Table Service Report Guide, Aloha EDC User Guide

Gift cards are plastic cards that operate very similarly to credit cards. They make great gifts for any occasion, offer a valuable marketing opportunity for your restaurant, and have proven to increase the average ticket size. Remaining card balances bring customers back, and small unredeemed balances become pure profit to your restaurant. While the major card brands support gift cards, private, independent gift cards are becoming very popular. To ensure the Aloha® Point-of-Sale (POS) can support these gift cards, we developed the ability for these independent processors to communicate with Aloha EDC using a UPI plugin specifically for each independent gift card host we need to support, such as Valutec.

The Valutec UPI plug-in supports the following:

- Selling a single or multiple gift cards.
- Adding value to a gift card.
- Redeeming a gift card.
- Querying the gift card balance.
- Deleting a single or multiple gift cards.
- Refunding a single or multiple gift cards.

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Installing Valutec Gift Cards

You must install the Valutec UPI plug-in prior to any configuration. Before you begin, ensure AlohaUPI.Core.dll, Edc.Svr.UpiClient.Interop.dll, and Log4Net.dll reside in the Bin directory. The Valutec UPI plug-in requires a password to download. Contact your NCR account manager for more information.

After you install the UPI plug-in, ensure ValutecAlohaUPI.dll and ValutecAlohaUPI.tlb are in the Bin directory.

To install the Valutec UPI plug-in:

1. Obtain the **ValutecUPISetup.msi** file.
2. Copy the **file** to a location on the file server.
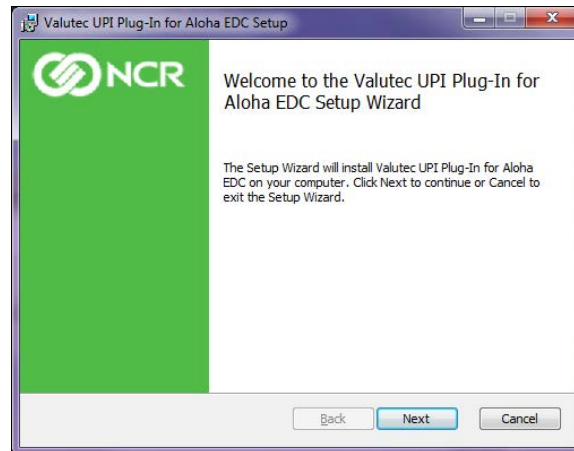3. Double-click **ValuetecUPISetup.msi**. The Valutec UPI Plug-In Welcome screen appears.

Figure 1 Valutec UPI Plug-In Welcome Screen

4. Click **Next**. The End-User License Agreement Screen appears.
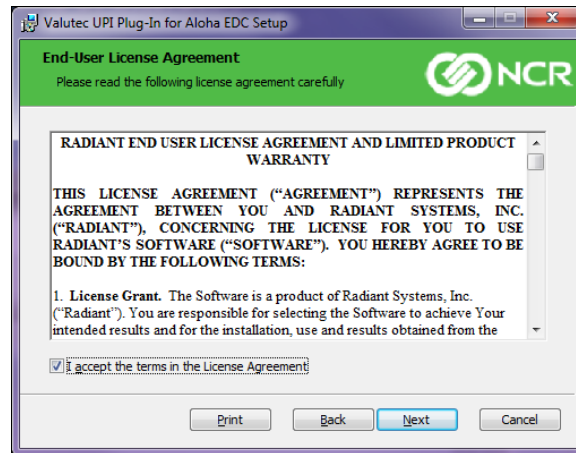
Figure 2 Valutec End-User Agreement Screen

5. Click **Next**. The Custom Setup screen appears.
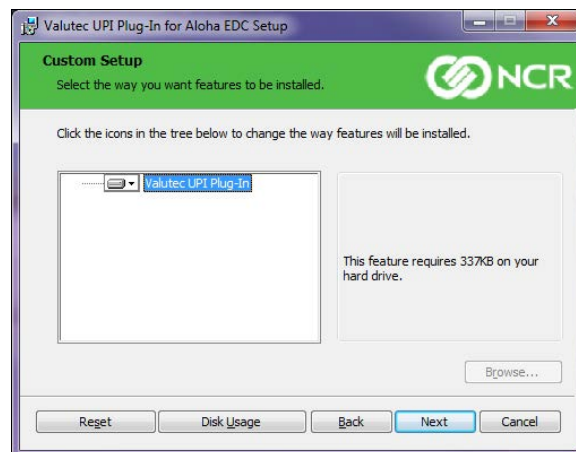
Figure 3 Valutec Customer Setup Screen

6. Click **Next**. The Ready to install Valutec UPI Plug-In screen appears.
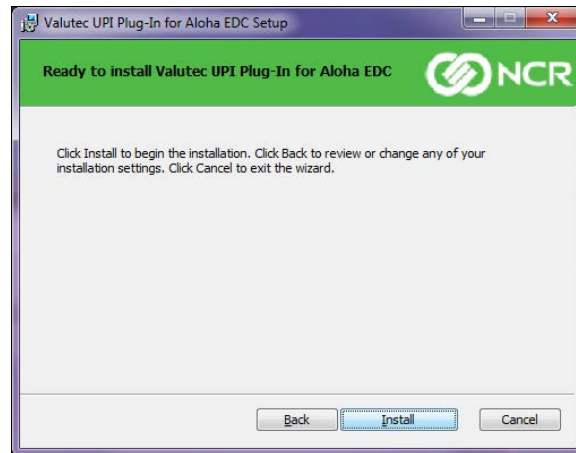
Figure 4 Ready to Install Valutec UPI Plug-In Screen

7. Click **Install**. The MSI installs the Valutec UPI plug-in and the status appears on the Installing Valutec UPI Plug-In screen.

Figure 5 Installing Valutec UPI Plug-In Screen

Upon completion, the Completed Valutec UPI Plug-In screen appears.

Figure 6 Completed Valutec UPI Plug-In Screen

8. Click **Finish**.

Configuring Valutec Gift Cards

The implementation of Valutec gift cards requires configuration in both Aloha EDC and the Aloha POS system. This document assumes you already have both of these products installed and working prior to adding the Valutec gift card functionality.

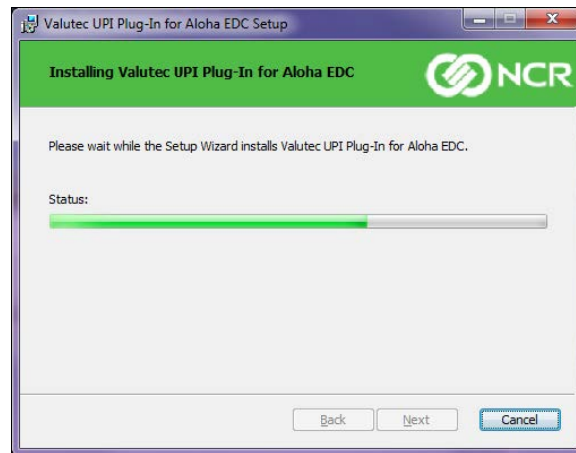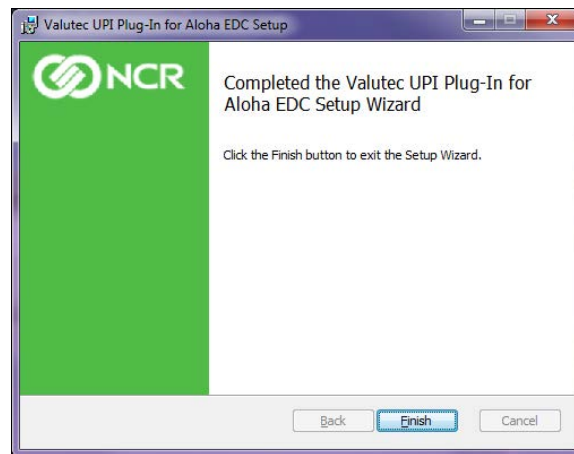## Configuring Aloha EDC for Valutec gift cards

To transmit transactions from the Aloha POS system to the Valutec gift card host, you must add Valutec as an independent processor in Aloha EDC and then designate Valutec as the gift card host. Valutec uses a hard-coded URL, embedded in the UPI plugin, to connect to the host for processing gift card transactions and does not support any failover mechanism, such as a dialup connection. You must be able to connect to the Internet to sell or redeem a gift card; otherwise you will be unable to complete the transaction. It may be necessary to ask the guest for another form of payment when they want to apply a gift card as payment for their transaction and the Internet is down.

Valutec 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 > Electronic Draft Capture > Processor** to add the Valutec processor. See page 10.
2.	Access **Maintenance > Electronic Draft Capture > Cards** to designate Valutec as the gift card host. See page 12.

Adding the Valutec processor

When adding a processor that uses a UPI plugin, you select 'Independent' as the processor type, and then select the type of UPI plugin from the 'Plugin type' drop-down list. The unique configuration data that tells the host what it needs to process transactions from your site resides in a file called ValutecAlohaUPI.cfg. Once you save the processor record, the system creates the configuration file for you and looks to this file for the unique terminal ID and client key.

> 📝 **Note**
>
> A version per site is required. You must update the Terminal ID and ClientKey obtained from your Valutec representative for each site. You must also establish a unique terminal ID and client key that identify the site submitting the transaction for processing.
>
> We strongly recommend you create a Valutec folder in C:\EdcProcPath for the TXN files. You must also navigate and update the EDC.ini file. Locate the 'Processor' section and add Valutec = 1.

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To add Valutec as an 'Independent' processor:

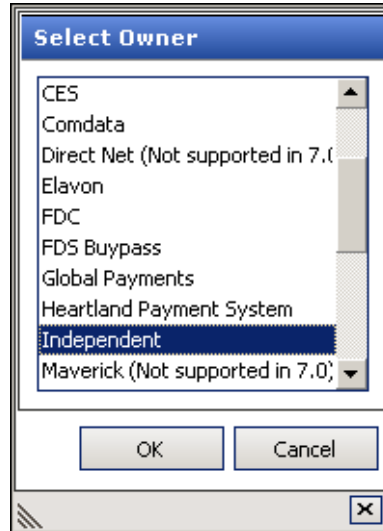1. Select **Maintenance > Electronic Draft Capture > Processor**.

Figure 7 Select Owner Dialog Box

2. Click the **New** drop-down arrow, select **Independent** as the type from the 'Select Owner' list box, and click **OK**.
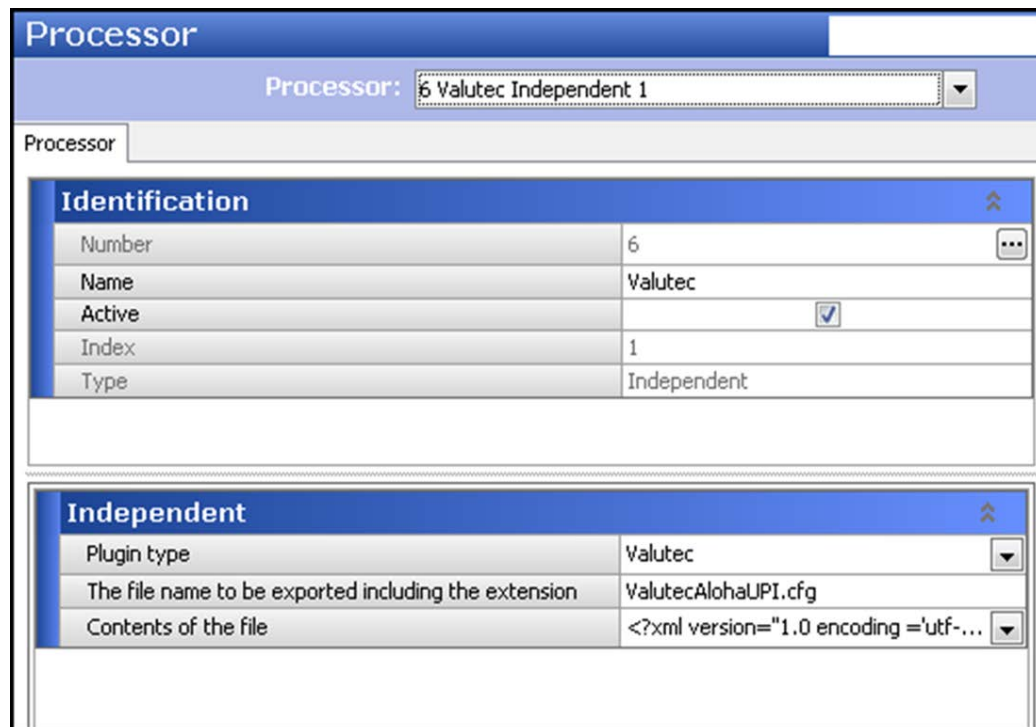

Figure 8 Processor - Valutec

3. Type a **name**, such as 'Valutec,' for the processor.

4. Leave the default value of '**1**' in 'Index' unless you have multiple processors of the 'Independent' type, each requiring a unique merchant ID, in which case you increment the index by one (1) for each instance.

5. Under the 'Independent' group bar, select **Valutec** from the 'Plugin type' drop-down list.

6. Type **ValutecAlohaUPI.cfg** in 'The file name to be exported including the extension.'

7. Click the **drop-down arrow** for 'Contents of this file,' type the following **string substituting the values** in TerminalID and ClientKey with the values provided to you by Valutec, and click OK.

<?xml version="1.0" encoding="utf-8"?>

<ConfigData xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:xsd="http://www.w3.org/2001/XMLSchema">

                        <TerminalID>704541</TerminalID>

                        <ClientKey>45c4ddcc-feb1-4cb1-99f0-1ba71d6d8f69</ClientKey>

                        <Debug>false</Debug>

                </ConfigData>

8. Click **Save** and exit the **Processor** function.

Designating Valutec as the gift card host

After adding the Valutec processor, you must designate Valutec as the gift card host.

To designate Valutec as the gift card host:

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

Figure 9 Electronic Draft Capture - Cards

2. Select **Independent** from the 'Private' drop-down list to expose 'Private independent processor.'
3. Select **Valutec** from the 'Private independent processor' drop-down list.
4. Click **Save** and exit the **Cards** function.

Configuring the Aloha POS system for Valutec gift cards

Configure the remaining features of Valutec gift cards in the Aloha POS system.

Valutec 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 designate Valutec as your gift card provider. See page 14.
2.	Access **Maintenance > Business > Store > Store Settings** tab **> Gift Card/Certificate Sales** group to define your Valutec gift card voucher print options. See page 15.
3.	Access **Maintenance > Menu > Items** to configure an item for selling a Valutec gift card. See page 17.
4.	Access **Maintenance > Menu > Submenus** to configure Valutec gift card buttons, either open amounts or predefined amounts, for selling on a submenu panel (TS only). Create buttons for activation and adding value. See page 21.
5.	Access **Maintenance > Screen Designer > Quick Service Screen Designer** to configure Valutec gift card buttons, either open amounts or predefined amounts for selling on a panel (QS only). Create buttons for activation and adding value. See page 22.
6.	Access **Maintenance > Payments > Tenders** to configure a Valutec gift card tender for redemption. See page 23.
7.	Access **Maintenance > Screen Designer > Quick Service Screen Designer** to add a button for redemption. See page 30.
8.	Access **Maintenance > Screen Designer > Quick Service Screen Designer** or **Table Service Screen Designer** to configure a button to query the remaining balance of a Valutec gift card. See page 31.
9.	Access **Maintenance > Labor > Pos Access Levels** to provide the ability for an employee to manually enter gift card numbers. See page 33.
10.	Access **Maintenance > Screen Designer > Quick Service Screen Designer** or **Table Service Screen Designer** to add the 'Query Gift Card Balance' button function to a panel (QS), or to an order screen panel or a floor plan in use (TS). See page 31.
11.	Access **Maintenance > System Settings > Event Schedule** to set up an event to activate an order screen panel. See page 34.
12.	Access **Utilities > Refresh POS Data** to update the information on the Front-of-House (FOH) terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. See page 35.

Designating Valutec as your gift card provider

You must designate Valutec as your gift card provider to sell and redeem a Valutec gift card.

To designate Valutec as your gift card provider:

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.

Figure 10 Store Settings Tab - Gift Card/Certificate Sales Group

4. Under the 'Gift sales' group bar, select **Private Label** from the 'Gift card/certificate provider' drop-down list.
5. Configure the **remaining options** on the group, as necessary.
6. Click **Save** and exit the **Store Settings** function.

Defining your gift card voucher print options

Just like credit cards, you can define certain printing criteria for the voucher that prints for a gift card upon redemption. You can define the text and number of vouchers to print. A voucher prints when you are redeeming a gift card, not when you are selling a gift card.

To define your gift card voucher print options:

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.
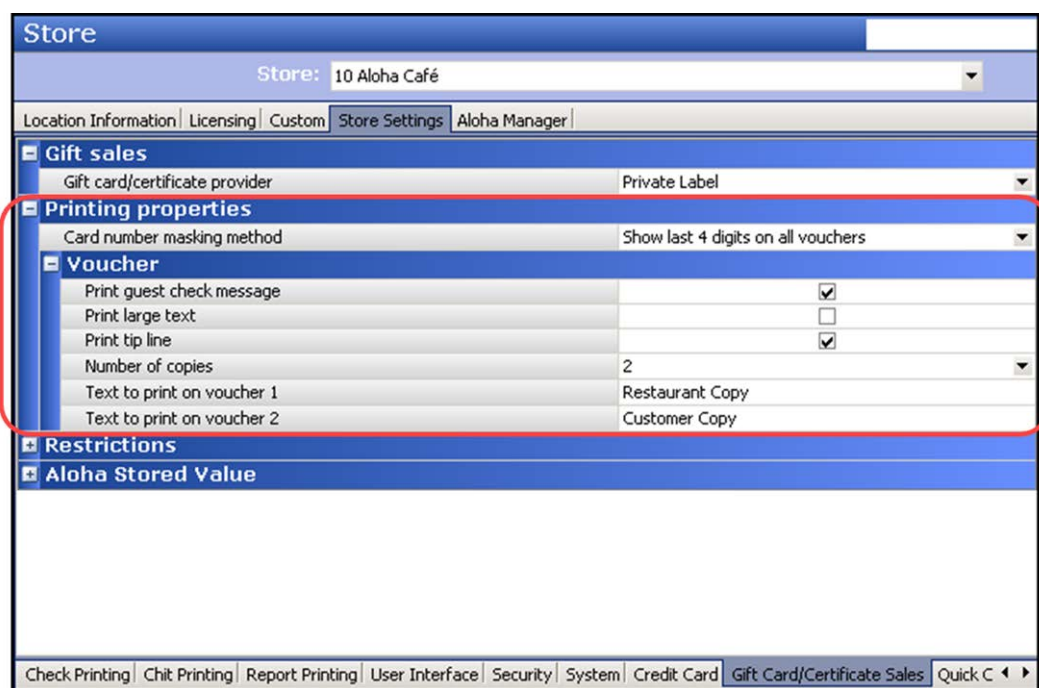
Figure 11 Defining Voucher Properties

4. Under the 'Printing properties' group bar, select the **portion of the gift card number** to print on the voucher; all others numbers are masked and do not print for the guest. Choose from 'Always show full number,' 'Show last 4 digits except on first voucher,' and 'Show last 4 digits on all vouchers.'

5. Under the 'Printing properties > Voucher' group bar, select **Print guest check message** to print additional text on each voucher.

6. Select **Print large text** to print the voucher text using a large font.

7. Select **Print tip line** to include a line at the bottom of the voucher so the guest can add gratuity.

8. Select the **number of vouchers** to print, up to four, for each gift card redemption. An additional voucher text box appears based on the number of vouchers you print. For example, if you select '2,' then two corresponding voucher text boxes appear.

9. Type the **text** to appear on the first voucher, such as 'Restaurant Copy,' in 'Text to print on voucher 1,' if necessary.

10. Type the **text** to appear on the second voucher, such as 'Customer Copy' in 'Text to print on voucher 2,' if necessary.

11. Repeat for **each copy** of the voucher to print.

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

Tracking gift card sales

If you want to track gift card sales separately from other retail items, create a gift card category.

To track gift card sales:

1. Select **Maintenance > Menu > Categories**.

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

Figure 12 Menu - Categories

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 Cards.'

5. Configure the **remaining options** as needed.

6. Click **Save** and exit the **Categories** function.

Creating gift card items for selling

As with everything you sell in the Aloha POS 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.**

Figure 13 Item Tab

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 '$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 Valutec gift card, as necessary.

9. Select the **Pricing** tab.

Figure 14 Items - Pricing Tab

10. Select **Item Price** as the 'Pricing method.'

11. Click **Save**.

12. Repeat this **procedure** if you need to create additional items for gift cards with other predetermined values.

13. Exit the **Items** function.

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.**

Figure 15 Item Tab

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,' in short name.

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 Valutec gift card, as necessary.
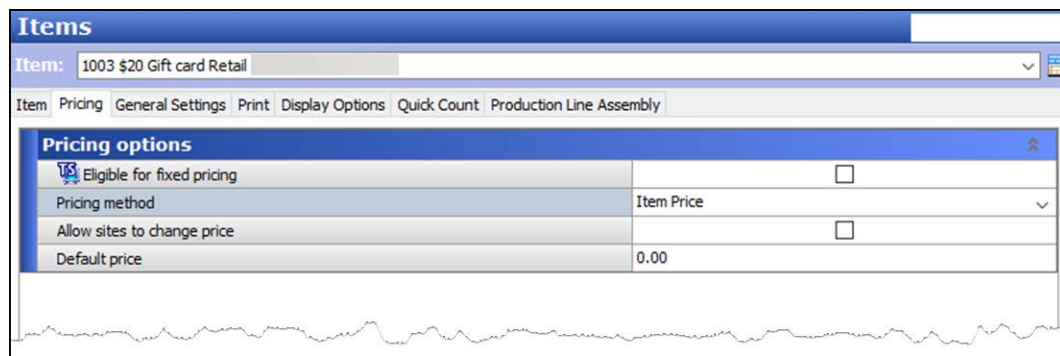
9. Select the **Pricing** tab.

Figure 16 Items - Pricing Tab

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

11. Click **Save**.

12. Repeat this **procedure** if you need to create additional items for gift cards with other predetermined values.

13. 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:

1. Select **Maintenance > Menu > Submenus**.
2. Select a **submenu** on which to add the gift card items from the 'Submenus' drop-down list. For example, 'Retail.'
3. Select the **Layout** tab.
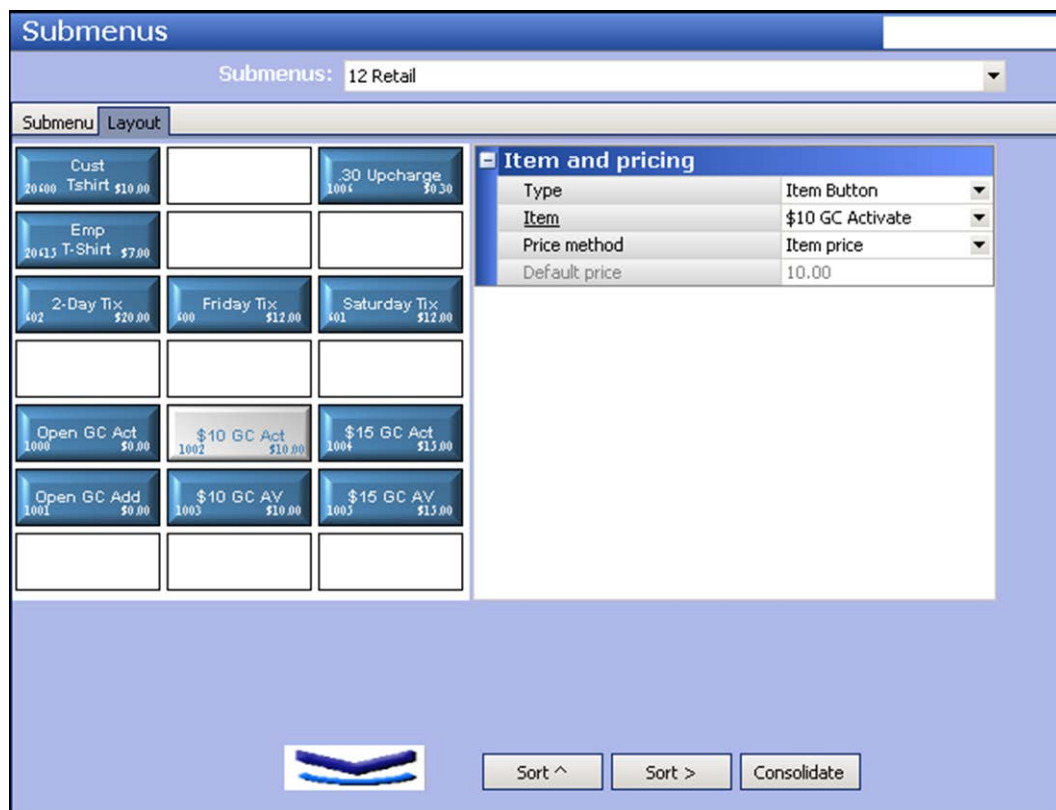
Figure 17 Submenu Panel

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 GC Activate,' 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**.

4. Select **Panel > New Button**. The Properties dialog box appears.
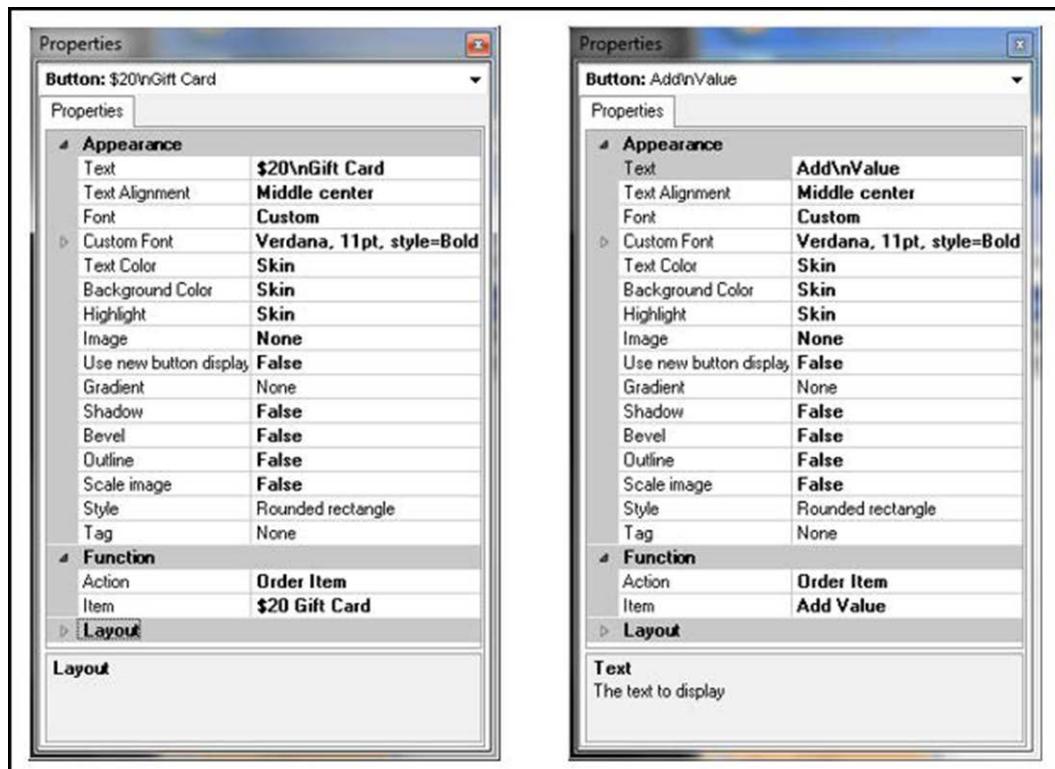
Figure 18 Predefined Amount Gift Card Button (Left) Add Value Gift Card Button (Right)

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

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 **Screen Designer** function.

Creating a tender for Valutec gift card redemptions

You must create a gift card tender for use when a guest wishes to redeem a Valutec gift card as payment for their guest check. When you create a tender of the 'Gift card' type, the options in the Tender function become specific to gift cards.

> **Note**
>
> Any tender with PL selected in 'Gift card provider' does not support providing cash back, whether it's just the balance of the card or full cash back without purchase.

For Table Service, the new Valutec tender appears on the Tender screen for selection based on the button position you choose when you create the gift card tender; however, for Quick Service, you must add a Valutec gift card button to the same panel containing the other tender buttons.

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To create a basic Valutec 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**.

Figure 19 Tenders - Tender Tab

3. Type a **name**, such as 'Valutec,' for the tender.

4. For Table Service, select 'First available button position' or click the **ellipsis (...)** and select an **available button position** on the selection screen that appears. When you close the selection screen, the corresponding row and column appear in 'Button position.'

5. Select '**Active**'.

6. Select the **Type** tab.

Figure 20 Tenders - Type Tab

7. Select **Private Label** as the 'Gift card provider' under the 'Type settings' group bar.

8. Select **Use magnetic card only** under the 'Options settings' group bar, to prevent an employee from manually entering a gift card number.

> 📝 **Note**
> You can override this setting for certain employees and allow them to enter the gift card number without manager approval by selecting 'Manual card number' under the 'Financial' group bar in Maintenance > Labor > Pos Access levels for the access level to which you assign the employee.

9. Select **Expiration** to prompt for an expiration date when manually entering a gift card number, if necessary.

10. Click **Save**.

11. Continue to the **next procedure**.

Allowing guests to tip using a gift card

Tipping a server using the remaining balance on a gift card is very common and typically increases the tip amount received by the server. There are a couple of methods that allow guests to tip using a gift card; however, you can configure the system to use only one method.

- Submit the payment and tip as a single transaction.
- Submit the payment and tip as two transactions.

Although the preferred method of payment is to submit the entire gift card payment, including the tip, to the host as a single transaction, it is much more common for the server to add the amount of the tip in a second transaction. In almost all cases, each transaction incurs a separate charge from the host. Whether you submit the payment and tip as one transaction or two, the tender configuration is the same. You must perform additional steps if you need to submit the payment and tip as two transactions.

Submit payment and tip as a single transaction

Submitting a gift card payment, including the tip, as one transaction reduces your overhead charge for gift card transactions; however, this method places an additional burden on the server and customer because the customer must let the server know the tip amount prior to receiving the first copy of the voucher.

To configure the gift card tender to allow the submission of the payment and tip as a single transaction:

1. With the Valutec gift card still active in the Tender function, return to the **Tender** tab.

Figure 21 Tender - Tips Group Bar

2. Select **Allow tips** under the 'Tips' group bar to enable you to apply part of the gift card amount to a tip.

3. Specify the **highest tip percentage you can apply to tips** in 'Maximum tip %,' when using this tender. If you enter 0 (zero), a manager must apply the tip to the guest check. For Table Service, type the percentage of tips you can recover from the employee to cover transaction costs, such as processing fees, in 'Tip refund %.'

4. Click **Save** and exit the **Tenders** function.

Submit payment and tip as two transactions

Additional configuration is required when submitting payment and tip as two transactions. You must also configure an 'Add Gift Card Tip' button to enable the system to contact the host processor a second time to process the tip.

To configure the system so that you can submit the payment and tip as two transactions:

1. With the Valutec gift card still active in the Tender function, return to the **Tender** tab.

2. Select **Allow tips** under the 'Tips' group bar to enable you to apply part of the gift card amount to a tip.

3. Specify the **highest tip percentage you can apply to tips** in 'Maximum tip %,' when using this tender. If you enter 0 (zero), a manager must apply the tip to the guest check. For Table Service, type the percentage of tips you can recover from the employee to cover transaction costs, such as processing fees, in 'Tip refund %.'

4. Click **Save** and exit the **Tenders** function.

To configure the AddGCTip utility (QS only):

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

2. Select **Work with Panels**.

3. Select **Panel > Open Panel** and select a Tenders panel to which to add the button and click **OK**.

4. Select an **available button** or right-click a **new button**. The Properties dialog box appears.
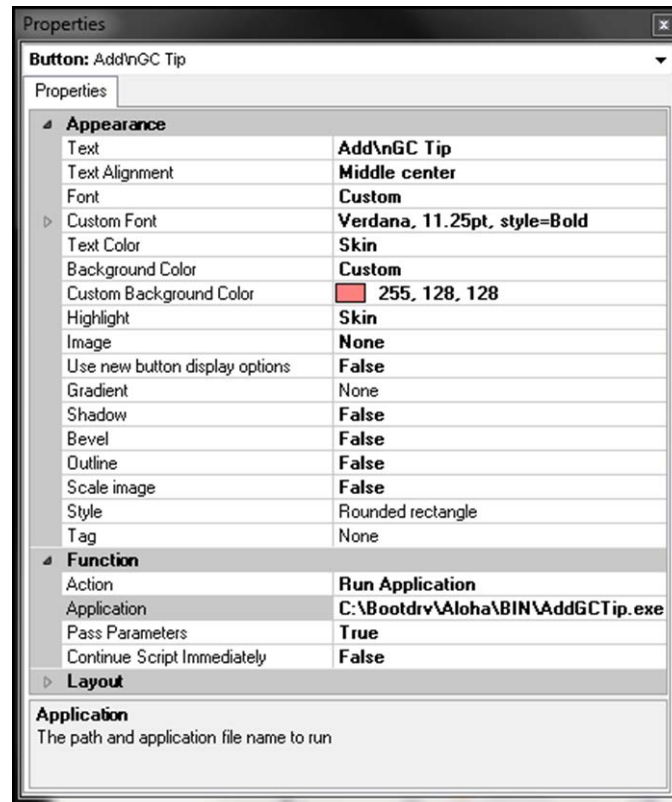
Figure 22 Add Gift Card Tip Button (QS Only)

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

6. Type the **path to AddGCTip**, such as 'C:\Bootdrv\Aloha\BIN\AddGCTip.exe,' in 'Application.'

7. Select **True** in 'Pass Parameters.'

8. Select **False** in 'Continue Script Immediately.'

9. Under the 'Appearance' Group bar, type a **name** for the button, such as 'Add\nGC Tip.' To display text on multiple lines, insert '\n' without spaces for line breaks.

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

11. Click **Save**.

12. Exit the **Quick Service Screen Designer**.

In Table Service, you add a command line to a new or existing TSbutton.cfg file to add the Add Gift Card Tip button to the Close screen.

To configure the AddGCTip utility (TS only):

1. Navigate and open **Notepad**.

2. Type the following **Command line** on the same text line, and with the appropriate commas and no spaces:

Typed Value	Reason
2,	Places the button on the Close screen.
0,	Prevents the button from appearing on a submenu.
20,	Specifies the button position. You must select an unused position.
Add GC\nTip	Specifies the text to appear on the button, with '\n' used as a line break.
C:\Bootdrv\Aloha\BIN\AddGCTip.exe,	Specifies the complete path to the AddGCTip.exe utility. Adjust to reflect the local installation.
0	Specifies that no extended command line information exists or is needed.
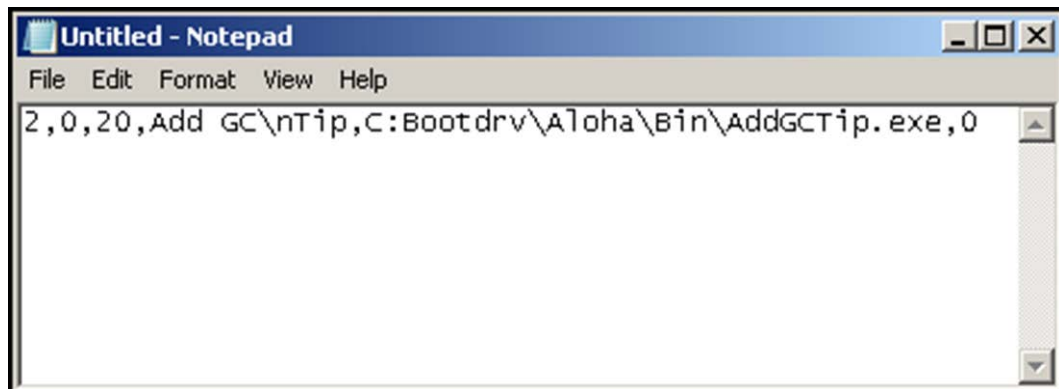
Figure 23 Command Line in Notepad (TS Only)

3. Click **File > Save**. The 'Save As' dialog box appears.

4. Navigate to the **Data directory**. Save the file in both of the Data and New Data folders.

5. Type **TSButton.cfg** in 'File name.'

6. Clear the ***.txt extension**.

7. Select **All Files (*.*)** from the 'Save as type' drop-down list.

8. Click **Save** and exit **Notepad**. The button appears at the designated button position on the Close screen in the FOH.

Adding a button for redeeming a Valutec gift card

Once you configure your Valutec gift card tender, add a button to the Tender screen of the FOH in which to redeem the Valutec gift card. For Table Service operations, the system adds the button for you based on the button configuration in the Tenders function.

To add a gift card button to a panel (QS only):

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.
2. Select **Work with Panels**.
3. Select **Panel > Open Panel** and select a Tenders panel to which to add the button and click **OK**.
4. Select an **available button** or right-click a **new button**. The Properties dialog box appears.
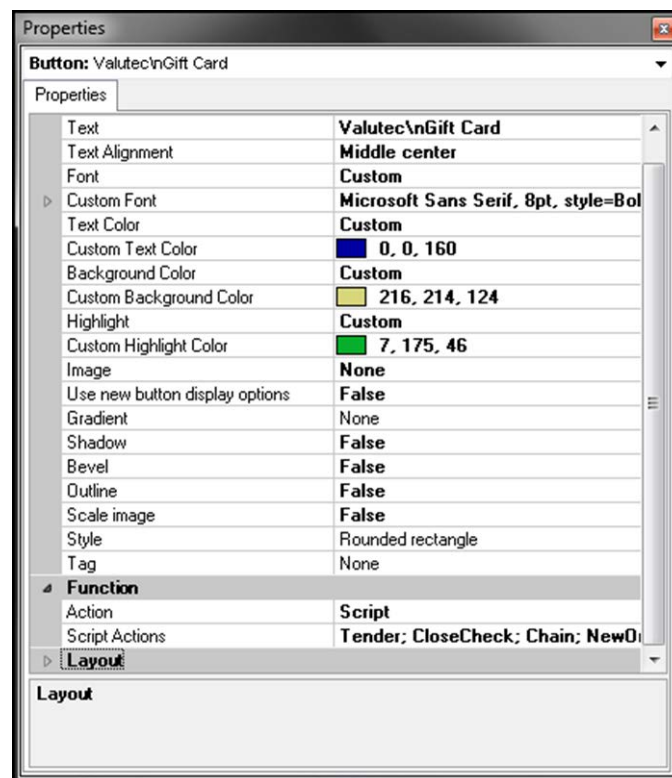

Figure 24 Redeem Valutec Gift Card Button

5. Under the 'Function' group bar, select **Script** from the 'Action' drop-down list.
6. Click the **ellipsis (...)** to display the Edit Script Actions screen.
7. Click **Add**.
8. Under the 'Function' group bar, select **Tender** as the 'Action Type.'
9. Select the **Valutec gift card tender** as the 'Tender.'
10. Configure the **remaining options** to fit your business needs.
11. Click **Add**.

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12. Under the 'Function' group bar, select **Close Check** as the 'Action Type.'

13. Configure the **remaining options** to fit your business needs.

14. Click **Add**.

15. Under the 'Function' group bar, select **Close Check** as the 'Action Type.'

16. Configure the **remaining options** to fit your business needs.

17. Click **Add**.

18. Under the 'Function' group bar, select **Chain** as the 'Action Type.'

19. Designate the **panels to display** as the 'Panels to display.'

20. Configure the **remaining options** to fit your business needs.

21. Under the 'Function' group bar, select **New Order** as the 'Action Type.'

22. Configure the **remaining options** to fit your business needs.

23. Click **OK**.

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

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

26. Click **Save**.

27. Exit the **Quick Service Screen Designer** or **Table Service Screen Designer** function.

Providing the ability to query a gift card balance

You can query the balance remaining on a gift card with the Query Gift Card Balance function. The balance of the card prints to the local receipt printer and does not display on screen. To provide the ability to query a gift card balance in Quick Service, you must add the Query Gift Card Balance button to a panel to be available for selection on the FOH; in Table Service, add the Query Gift Card Balance button to an order entry panel or floorplan panel.

To provide the ability to query a gift card balance:

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

2. Select **Work with Panels**.

3. Select **Panel > Open Panel**, select a **panel**, and click **OK**. If you are using Table Service, select either a **floorplan panel** or an **order entry panel**.

4. Right-click the **panel** and select **New Button**. The Properties Dialog box appears.
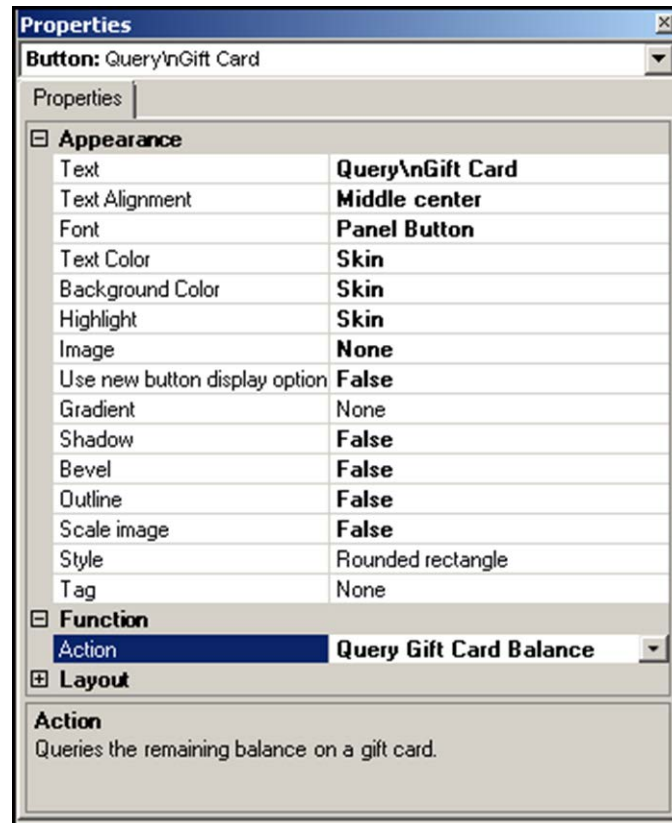
Figure 25 Properties Dialog Box - Query Gift Card Balance

5. Under the 'Function' group bar, select **Query Gift Card Balance** from the 'Action' drop-down list.

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

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

8. Select **Panel > Save Panel** and exit **Quick Service Screen Designer** or **Table Service Screen Designer**.

Providing the ability to manually enter gift card numbers

If you select 'Use magnetic card only' under the 'Options settings' group bar on the 'Type' tab in Maintenance > Payments > Tenders, the only way to manually enter a gift card number, should the card become demagnetized or unreadable, is with manager approval; however, you can give appropriate employees the ability to manually enter a gift card number and bypass the manager approval screen.

To provide the ability to manually enter gift card numbers:

1. Select **Maintenance > Labor > Pos Access Levels**.
2. Select an **access level** from the drop-down list.

Figure 26 Pos Access Levels

3. Under the 'Financial' group bar, select **Manual card number** to allow employees assigned to this access level to bypass manager approval when attempting to manually enter a gift card number.
4. Click **Save**.

5. Repeat this **procedure** for each access level requiring the ability to manually enter gift card numbers.

6. Exit the **Pos Access Levels** function.

Adding the 'Set Order Screen Panel by Jobcode' event type to an event schedule

Adding the Set Order Screen Panel by Jobcode event type stipulates the panel to appear to employees with designated job codes. How you are using the Event Schedule function determines whether you add this event type to an existing event schedule or add it to a new event schedule you create. For the purposes of this document, we assume you use one event schedule to which you add all events.

To add the 'Set Order Screen Panel by Jobcode' event type to an existing event schedule:

1. Select **Maintenance > System Settings > Event Schedule**.

2. Select the **event schedule** to edit from the drop-down list.

3. Select the **Events** tab.
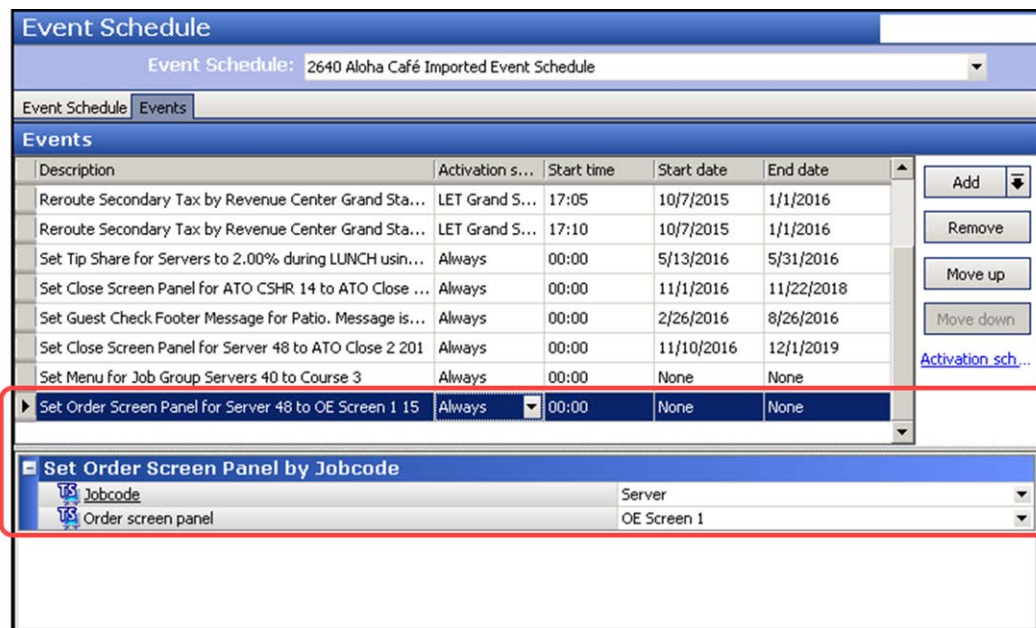
Figure 27 Event Schedule

4. Click the **Add** drop-down arrow, select **Set Order Screen Panel by Jobcode** as the event type, and click **OK**. The new event appears under the 'Events' group bar.

5. Select **Always** from the 'Activation Schedule' drop-down list. Because the Always activation schedule stipulates to begin at 'start of day,' you cannot edit the 'Start time' in the event definition. This information is ready only.

6. Select the **date** on which you want the event to become active at the store in 'Start date.'

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7. Select the **date** on which you no longer want the event to be active at the store in 'End date.'

8. Under the 'Set Order Screen Panel by Jobcode' group bar, select the **job code** for which you want a custom panel to appear from the drop-down list.

9. Select the **custom panel** to appear specifically for the selected job code from the 'Order screen panel' drop-down list. The Events tab reflects your selections under the 'Events' group bar as you make them.

10. Click **Save**.

11. Repeat this **procedure** to configure additional job codes for which you want the panel to appear.

12. Exit the **Event Schedule** function.

Refreshing the data

After all settings are in place in Aloha Manager, it is necessary to select Utilities > 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.

Using Valutec Gift Cards

After you set up the necessary Back-of-House (BOH) requirements, you can sell and apply gift cards as a form of payment in the Front-of-House (FOH). In all cases, the Aloha POS system connects to the host through a processor to receive authorization and verification. When using Valutec, you must use Aloha EDC to provide a method of transmitting information. The process reverses when the host returns with an approval code.

Gift card FOH rules

You cannot:

- Close a check while processing a gift card transaction.
- Apply a payment to the check while processing a gift card transaction.
- Use the Quantity or Repeat buttons when selling a gift card.

Selling gift cards

Gift cards are special items that connect to a host for approval as soon as you slide the card across an available magnetic stripe reader (MSR), or manually enter the gift card number and touch OK.

SCENARIO: PRE-DEFINED VALUE GIFT CARD The guest purchases a new $20.00 gift card. You cannot enter a purchase amount when selling the gift card because the price is defined in the BOH. The Aloha POS system sends a request to the host to activate the card for $20.00. The host returns with either an approval or a decline.

SCENARIO: OPEN VALUE GIFT CARD The guest purchases an open-value card and wants to start with a balance of $50.00. You enter a purchase amount of $50.00 in the FOH. The Aloha POS system sends a request to the host to activate the card and add a $50.00 value to the card. The host returns with either an approval or a decline.

SCENARIO: ADD VALUE The guest wants to increase the balance of an existing card to $100.00. You enter a purchase amount of $100.00 in the FOH. The Aloha POS system sends a request to the host to add $100.00 to the balance of the card. The host returns with either an approval or a decline.

Selling a single gift card

You sell a single gift card as you would any other item.

To sell a single gift card:

1. Locate and touch a **menu item configured as a gift card**. The Please Enter Card screen appears.
2. Confirm the **quantity** and touch **OK**.
3. If the card does not have a price defined in the BOH, enter the **purchase amount**, using the numeric keypad, and touch **OK**.
4. Slide the **gift card** across an available MSR, or manually enter the **gift card number** using the numeric keypad, and touch **OK**.

   If the Manager Override dialog box appears, touch **OK** to display the Manager Approval screen.

   A manager, or another employee with a similar access level, must **enter a password**, and touch **OK**. Enter the **entire card number** and verify the number you enter on screen matches the card before touching **OK**.

   The Aloha POS system connects to the host and begins processing. The Order Entry screen appears with the gift card transaction in blue text in the guest check window. Upon approval, the text turns to black and order the gift card.
5. Close the **check** as normal.

Selling multiple gift cards

To sell multiple gift cards, select the number of gift cards, slide the first card, and touch OK. A new screen appears asking you to slide the next card and specify the remaining number of cards to enter. Continue until you enter all cards. After entering the last card number, the system connects to the host and begins processing. When you use this method to sell more than one gift card, each card appears as a separate transaction in the guest check window.

To sell multiple gift cards:

1. Locate and touch a **menu item configured as a gift card**. The Please Enter Card screen displays.
2. Enter the **quantity of gift cards**, using the numeric keypad, and touch **OK**.
3. If the card does not have a price defined in the BOH, enter the **purchase amount** using the numeric keypad, and touch **OK**.
4. Slide the **gift card** across an available reader, or enter the **gift card number** using the numeric keypad, and touch **OK**.

   If you encounter a Manager Override dialog box, touch **OK** to display the Manager Approval screen. A manager, or another employee with a similar access level, must **enter a password**, and touch **OK**. Enter the **entire card number** and verify the number you enter on screen matches the card before pressing **OK**. You encounter the Manager Approval screen on the first

card number only, and do not need to keep entering a manager password to complete the transaction.

An additional screen appears for the next card, based on the quantity number.

5. Repeat **step 4** until you enter all gift cards. The system connects to the host and begins processing. The Order Entry screen appears with each gift card transaction in blue text in the guest check window. Upon approval, the text turns to black and orders the gift cards.

6. Close the **check** as normal.

Deleting gift cards

You can only delete a gift card in the same manner in which you sell the gift card. For example, if you sell four gift cards to a customer as single gift cards, four separate transactions display in the guest check window. If the guest decides they only want three gift cards, select one of the gift card transactions and touch Delete to remove it from the guest check.

> 📝 **Note**
> You can only delete a gift card from an active check. You cannot delete a gift card from a closed check.

To delete a gift card:

1. Touch the **gift card transaction** in the guest check window.

2. Touch **Delete**.

3. If you encounter a Manager Override dialog box, touch **OK** to display the Manager Approval screen. A manager, or another employee with a similar access level, must **enter a password**, and touch **OK**.

4. Select a **reason** for deleting the gift card. The Aloha POS system sends a request to the host to reverse the selected transaction. Upon approval of the deletion, another gift card transaction appears in the guest check window in red with a negative amount to offset the original transaction.

Applying a gift card payment

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

If you are required to enter the gift card using an MSR, and the card is unreadable, a manager or an employee with a similar access level must enter the card manually.

Applying the payment and tip as one transaction

Use this procedure if you know the tip amount, even if it is $0.00, at the time you receive the card from the guest. The system prompts you for the tip amount after you enter the payment amount, so both amounts are sent to the host as one transaction.

To apply the gift card payment and tip as one transaction:

1. With the check displayed in the guest check window, locate and touch a **tender configured as a gift card**. The corresponding Valutec gift card screen appears. If you encounter a Manager Override dialog box, locate a manager or another employee with a similar access level to enter the Valutec gift card number manually.
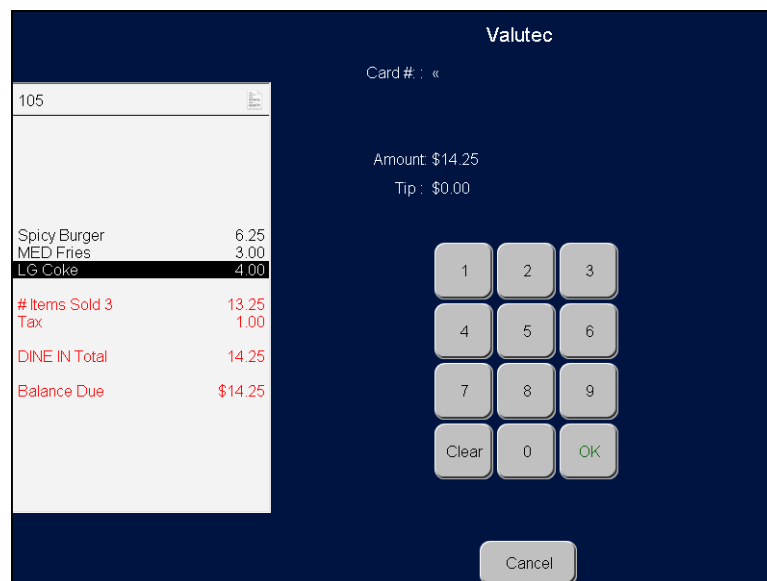

Figure 28 Valutec Gift Card Screen

2. Slide the **gift card** across an MSR, or enter the **Valutec gift card number** using the numeric keypad, and touch **OK**. The cursor moves to the Amount field.
3. Touch **OK** to accept the default amount. The cursor moves to the Tip field.
4. Enter the **tip amount**, if applicable.

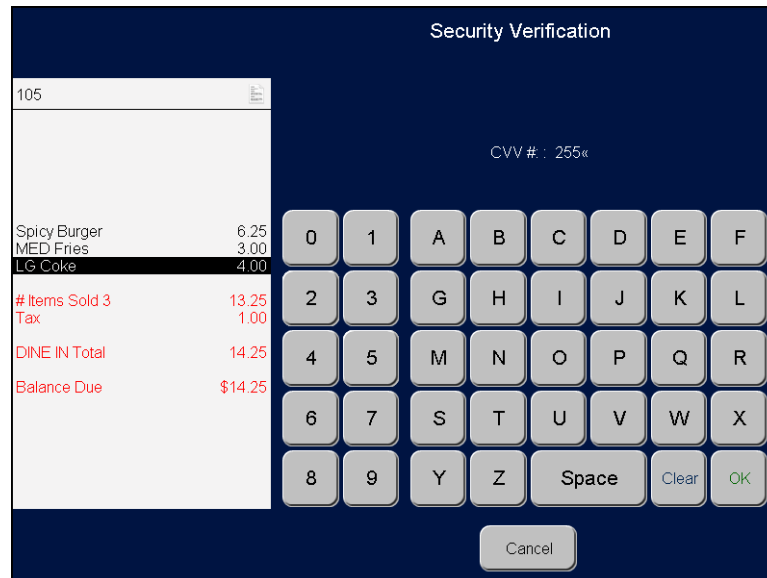5. Touch **OK**. The Security Verification screen appears.

Figure 29 Security Verification Screen

6. Type the **card verification value (CVV) number** and touch **OK**. *Note:* The Security Verification screen may not appear unless configured to do so.

    The Aloha POS system sends a request to the host for the payment amount plus the tip, if any. If the host approves the request, the payment reflects in the balance of the guest check.

7. Continue to **apply payments** until the balance of the guest check is zero and close the **check**.

Applying the payment and tip as two transactions

Use this procedure for scenarios where you must return to the terminal with the customer voucher and enter the tip as a separate transaction. This procedure sends two transactions to the host for approval, and although it can result in two changes from the host is better suited for most restaurant operations.

To apply the gift card payment and tip as two transactions:

1. With the check displayed in the guest check window, locate and touch a **tender configured as a gift card**. The corresponding Valutec gift card screen appears.

2. Enter the **amount of payment to apply to the gift card**, or accept the **default amount**, and touch **OK**. If the tender is configured to accept overpayment, then enter the amount requested by the guest. The host approves only the total amount available on the card.

3. Slide the **gift card** across an MSR, or enter the **gift card number** using the numeric keypad, and touch OK.

    If you encounter a Manager Override dialog box, touch **OK** to display the Manager Approval screen. A manager, or another employee with a similar access level, must **enter a password**, and touch **OK**.

Enter the **entire card number** and verify the number you enter on screen matches the card before pressing **OK**.

The Aloha POS system sends a request to the host for the payment amount. If the host approves the request, the payment reflects in the balance of the guest check.

4. Log out of the **Aloha POS system** until you receive the voucher from the customer and know the tip amount.

5. Return to the **terminal** and log **back in**.

6. Recall the **check** containing the gift card payment.

7. Touch the **button** configured as **Add GC Tip**. The Enter Tip Amount screen appears.

8. Enter the **tip**, using the numeric keypad, and touch **OK**. The Aloha POS system sends a second request to the host for the tip amount. If the host approves the request, the payment reflects in the balance of the guest check.

> **Note**
>
> If the balance on the gift card is not sufficient to cover the requested payment amount, the balance of the gift card is subtracted from the guest check, and a balance is left owing on the check. If you include a tip amount in the request, and the gift card balance is sufficient to cover the payment amount, but not the tip, the Aloha POS system applies the available gift card balance to the guest check first, then applies the remainder as the tip amount.

9. Continue to **apply payments** until the balance of the guest check is zero and close the **check**.

Issuing cash value to the guest without purchase

If your restaurant allows the full cash value of the gift card back to the guest without purchasing an item, you must apply the gift card tender to a $0.00 priced item. If you do not know the balance of the card, we recommend entering an amount larger than the card, instead of performing a balance inquiry. Performing a balance inquiry and then issuing full cash value back to the guest results in two separate transactions to the host, therefore, applying an additional charge.

SCENARIO: The guest hands a gift card to the employee and requests the full value of the card without purchasing an item. Start the check and add the $0.00 priced item. Apply the gift card tender to the check and enter an amount that exceeds the balance of the gift card. The host only approves the remaining balance. Refund the balance of the card in cash and take the card from the guest, or allow the guest to keep the card with a $0.00 balance.

To issue cash value to the guest without purchase:

1. Locate and touch a **menu item configured as a $0.00 priced item**, such as 'Gift Card Refund.'

2. Touch a **tender configured as a gift card**. The corresponding gift card screen appears

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3. Enter an **amount greater than the balance** of the gift card.

4. Slide the **gift card** across an MSR or enter the **gift card number** using the numeric keypad, and touch **OK**.

   If you encounter a Manager Override dialog box, touch **OK** to display the Manager Approval screen. A manager, or another employee with a similar access level, must enter a **password**, and touch **OK**.

   Enter the entire card number and verify the number you enter on screen matches the card before touching **OK**.

   The Aloha POS system sends a request to the host for the amount of the guest check, which $0.00. The host approves the amount and shows the amount available on the card as change due to the guest.

Applying a promotion that discounts a gift card

You can apply a promotion that discounts a gift card in the same way as any other promotion, except in the case where multiple gift cards are involved. If the promotion does not support cards sold with the 'Activate Range' feature, you must add the gift cards to the check as single transactions. If you try to add them using 'Activate Range.' then the message, 'No eligible items are found' appears when you try to apply the promotion.

To apply a promotion that discounts a gift card:

1. Locate and enter the **items** on the check.

2. Determine if the **customer qualifies for a promotion** that offers a discounted gift card. If so, sell the gift card as you normally would to add the gift card to the guest check.

   If the promotion automatically applies, the guest check reduces by the amount of the promotion. Skip to step 5.

3. Locate and touch the **button configured as the appropriate promotion**.

4. If you encounter a Manager Override dialog box, touch **OK** to display the Manager Approval screen. A manager, or another employee with a similar access level, must enter a **password**, and touch **OK**. A screen prompts you to select the appropriate promo items.

5. Select the **gift card item** and touch **OK**. The guest check reduces by the amount of the promotion.

6. Close the **check** as normal.

Applying a comp that discounts a gift card

You can apply a comp that discounts a gift card in the same way as any other comp, except in the case where multiple gift cards are involved. If the comp does not support cards sold with the 'Activate Range' feature, you must add the gift cards to the check as single transactions. If you try to add them using 'Activate Range,' then the message, "No eligible items are found" displays when you try to apply the comp.

To apply a comp that discounts a gift card:

1. Recall the **check** to apply the comp.

2. Sell the **gift card** as you normally would to add the gift card to the guest check.

3. Locate and touch the **button configured as the appropriate promotion**.

   If you encounter a Manager Override dialog box, touch **OK** to display the Manager Approval screen. A manager, or another employee with a similar access level, must enter a **password**, and touch **OK**. A screen prompts you to select the appropriate comp items.

4. Select the **gift card item** and touch **OK**. The guest check reduces by the amount on the comp.

5. Close the **check** as normal.

Inquiring a gift card balance

You can query the balance of a gift card to determine the remaining value on the card. The amount prints to the local receipt printer and does not display on screen.

To inquire a gift card balance:

1. Locate and touch a **button configured as a gift card inquiry**. The Enter Card Information screen appears.

2. Slide the **gift card** across an MSR or enter the **gift card number** using the numeric keypad, and touch **OK**.

   The system dials out to the host and a 'Transaction Processing' confirmation message appears. A balance report for the card, as shown in the following example, prints to the local receipt printer:

   > Gift Card XXXXXXXX1234
   > Tran: 0001289
   > Gift Card Balance: $4.96

3. Touch inside the **message box** to clear the message.

Reporting Valutec Gift Cards

Valutec gift card information appears on the following reports:

Aloha BOH

Payment report

Figure 30 Payment Detail Report Example

Audit report

Figure 31 Audit Report Example

EDC FOH

To view the EDC Transaction report:

1. Log in to **Aloha EDC**.
2. If POS processing is not started, select **Start POS Processing**.
3. Select **Reports > Review Transactions** to display the Batch Transaction Report dialog box.
4. Select the batch(es) to include in the report.
5. Select the **employee(s)** to include in the report.
6. Select the **Valutec gift card** as the 'Card Types.'
7. Select the **Report type**.
8. Select the **sort criteria** in 'Multi-Store Mode.'
9. Make a selection from the **First Sort By** inset to determine the first sort order.
10. Make a selection from the **Second Sort By** inset to determine the second sort order after 'First Sort By'.
11. Click **View** to preview the report.

```
Aloha Café                                EDC Transaction Report                              Page 1 of 2
5555 Fifth Avenue South                                                              07/21/17 – 10:07 AM
Naples, FL 34102                              07/21/2017                      Printed by: Seeded Administrator


Credit Card / Debit Card Transactions


Employee        Check     Txn       Type      Card              Qty     Exp     Auth          Trace #    Total
-----------     -------   -------   -------    --------------    ----    ----    ----------    -------    ------

130 Robert Stahl   100012  Add Valu  GC PRIVA  XXXXXXXXXXXX1963    1             102524:3177              20.00
130 Robert Stahl   100015  Add Valu  GC PRIVA  XXXXXXXXXXXX4896    1             102778:6770              20.00
130 Robert Stahl   100016  Add Valu  GC PRIVA  XXXXXXXXXXXX1784    1             102452:1548              30.00
132 Marcus Tufo    100017  Add Valu  GC PRIVA  XXXXXXXXXXXX1473    1             102448:1599              50.00
132 Marcus Tufo    100019  Add Valu  GC PRIVA  XXXXXXXXXXXX4336    1             102998:7118              50.00
134 Olivia Benson  100024  Add Valu  GC PRIVA  XXXXXXXXXXXX1924    1             102446:9963              20.00
134 Olivia Benson  100033  Add Valu  GC PRIVA  XXXXXXXXXXXX1833    1             102795:7733              20.00

                            GC PRIVATE Total 7 transactions:                              210.00

                            GC PRIVATE Grand Total transactions                           210.00

                            Grand Total 7 transactions:                                   210.00


Legend:
    M = Manually entered card number
    V = Voided gift card transaction
```

Figure 32 EDC Transaction Report Example

Troubleshooting Valutec Gift Cards

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

- After you install the Valutec UPI plug-in, you should see ValutecAlohaUPI.Core.dll or ValutecAlohaUPI.tlb in the BIN directory. If the files are not present, contact your NCR account representative.
- EDC does not settle Valutec. You must open EDC and force settle the gift cards.

Error Message: Transaction for card xxxxx was declined.

Figure 33 Error Message

If you receive the error message shown in Figure 33, follow the procedure below.

> ⚠️ **Caution**
> Unexpected results may occur when updating the registry on your computer. Proceed with caution.

1. Type **regedit** in the Command Line Prompt. A User Account Control dialog box appears.
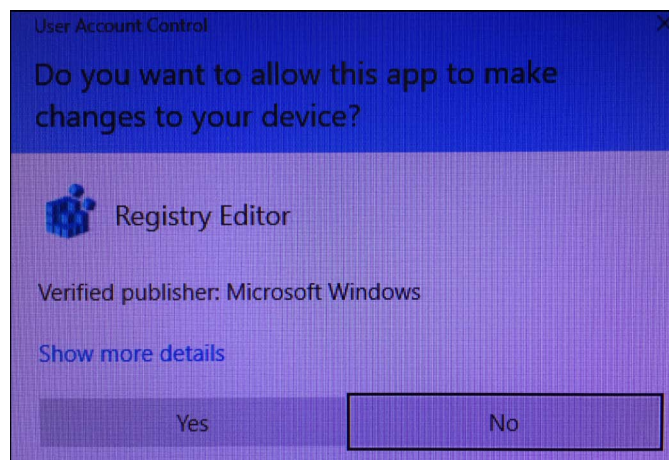

Figure 34 User Account Control Dialog Box

2. Click **Yes** to allow the app to make changes to your device. The Registry Editor screen appears.

3. Under 'Computer,' select **HKEY_LOCAL_MACHINE > Software**.

4. Select **WOW6432Node > Microsoft**.

5. Select **.NETFramework**.

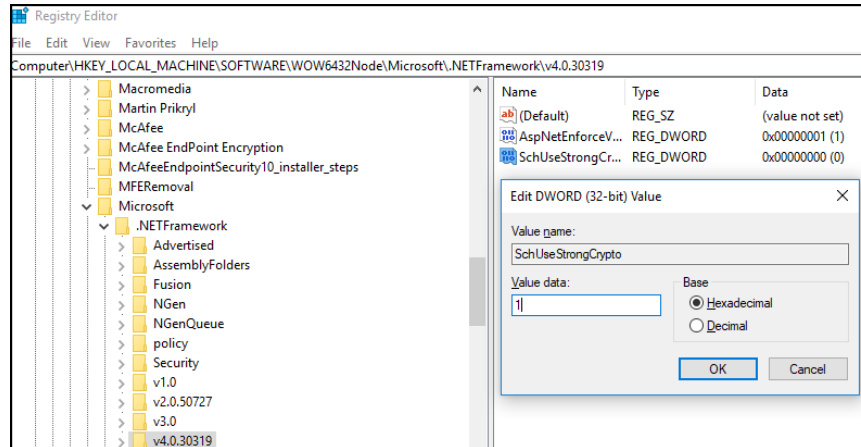6. Select **v4.0.30319**.

Figure 35 Registry Editor

7. Right-click **SchUseStrongCrypto** and select **Modify**.

8. Type 1 in 'Value data:' and click OK.

9. Exit the Registry Editor screen.

Error Message: Could Not Make SSL Connection to Host

You may receive the following error message, 'Could not make SSL connection to Host,' if you use Vantiv or other processors. Valutec instructed merchants to upgrade to TLS 1.2, and it appears that the error message began appearing shortly after Valutec disabled TLS 1.0; however, even if you have TLS 1.2 flagged in Internet Explorer under Internet Options, you can continue to receive the error message. If you run an Internet/Network traffic software, such as 'WireShark,' the software continues to send over the SSL using lower versions of TLS, such as '1.0, or 1.1.'

1. Enter the **group policy editor**, '**gpedit.msc**,' and navigate to **Computer Configuration**.

2. Select **Administrative Templates > Window Components**.

3. Select **Internet Explorer > Internet Control Panel > Advanced Page**.

4. Select **Turn Off Encryption Support**, right-click and select **Edit**. The Turn off encryption support box appears.
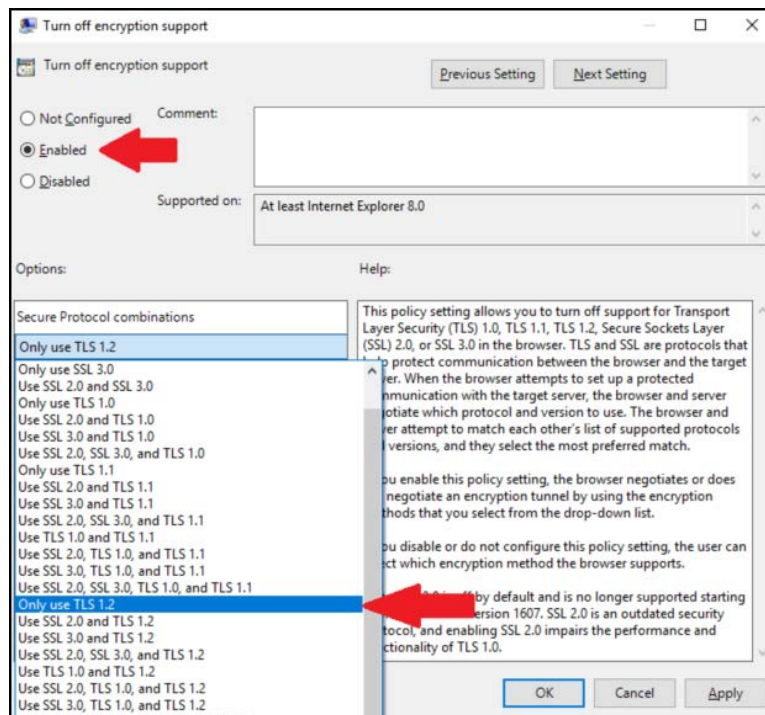

Figure 36 Turn Off Encryption Support

5. On the left side of the screen and under 'Turn off encryption support,' select **Enabled**.

6. Under 'Secure Protocol combinations,' select **Only use TLS 1.2**.

7. Click **Apply**.

8. Click **OK** to exit.

Valutec Gift Cards, 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