

Feature Focus Guide

Credit Card Lookup in Table Service

Core Product: Aloha Table Service
Last Updated: June 20, 2024

Contents

- About Credit Card Lookup in Table Service** 4
- Configuring Credit Card Lookup** 5
 - Creating a Credit Card Lookup tender 5
 - Designating the tender ID to appear on the FOH tenders screen 6
 - Refreshing the data 6
- Using Credit Card Lookup** 7

Copyright and Trademark Information

The products described in this document are proprietary works of NCR Voyix.

NCR Voyix is a registered trademark of NCR Voyix.

Aloha is a registered trademark of NCR Voyix.

Microsoft and Windows are registered trademarks of Microsoft Corporation in the United States and/or other countries.

All other trademarks are the property of their respective owners.

It is the policy of NCR Voyix to improve products as technology, components, software, and firmware become available. NCR Voyix, therefore, reserves the right to change specifications without prior notice.

Not all features, functions and operations described herein are available in all parts of the world. In some instances, photographs are of equipment prototypes; therefore, before using this document, consult with your NCR Voyix representative or NCR Voyix office for the most current information.

© 2024 NCR Voyix

Atlanta

Georgia

USA

www.ncrvoyix.com

All Rights Reserved



Revision Record

Date	Version #	Description
	5.3.21e	Introduced support for Credit Card Lookup in Table Service.
07/30/2023		Published Credit Card Lookup FFG.
06/20/2024		Updated document to reflect NCR Voyix branding.

About Credit Card Lookup in Table Service

Credit Card Lookup in Table Service at a glance	
Core Product	Aloha Table Service
Complementary Products	No
Separate License Required?	No
Other References	Aloha Table Service Reference Guide

Currently, when tendering a check, you must select a tender button associated with a specific credit card type, such as Master Card or Visa. You can now implement the Credit Card Lookup feature available in Aloha® Table Service that allows you to use a generic credit card button on the Front-of-House (FOH) tenders screen, therefore, reducing the number of credit card buttons from which to select. The system searches the credit cards defined in the Back-of-House (BOH), based on the prefix number, and reports to the appropriate credit card.



Figure 1 Credit Card Lookup Illustration

SCENARIO: The guest hands a Visa card to the employee for payment. The employee recalls the check, navigates to the Close screen, and touches the credit card lookup button. When they swipe the card across the mag swipe reader, the system identifies the tender as a Visa based on the prefix defined for the card.



Reference

Refer to the [Aloha Table Service Reference Guide](#) for more information on configuring credit cards.

Configuring Credit Card Lookup

To implement the Credit Card Lookup feature, you must define each credit card tender type honored at your store as normal, but with a valid prefix number and without an assigned button position. Then create a generic credit card lookup tender to assign to the 'Credit Card Lookup ID' drop-down list in Maintenance > Store Settings > Credit Card. When finished, refresh the system to update your configuration.

Creating a Credit Card Lookup tender

You must define a credit card lookup tender as a non-applicable credit card tender and clear the 'Report As', 'Tender Type', 'Require Identification', and 'Require Authorization' options.

1. Log in to **Aloha Configuration Center (CFC)** or **Aloha Manager (AM)**.
2. Select **Maintenance > Payments > Tenders**.
3. Click the **New** drop-down arrow, select **Credit card** from the 'Type' list box, and click **OK**.
4. Under the 'Settings' group bar, accept the **system assigned number** or click the **ellipses (...)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.
5. Type a **short name**, such as 'CC Lookup,' in 'Name,' to assist with identifying the tender.
6. Select **First available button position** to allow the system to place the tender button in the first available position on the FOH Tender screen.
-OR-
Click the **ellipses (...)** to display the Button Position dialog box and select an **available position** for the tender.
7. Select an **image** to appear on the button in place of the name, such as a generic credit card logo, from the 'Button image' drop-down list.
8. Click **Save**.
9. Leave the default value of **Current** in 'Report as' to report the credit card as itself.
10. Select **Active**.
11. Select the **Type** tab.
12. Select **Not Applicable** from the 'Credit card provider' drop-down list.
13. Select the **Identification** tab.
14. Clear **Require identification**, if selected.
15. Select the **Authorization** tab.
16. Clear **Require authorization**, if selected.
17. Click **Save** and exit the **Tenders** function.

Designating the tender ID to appear on the FOH tenders screen

After you create the generic credit card, you must designate the credit card tender to appear in the FOH.

1. Select **Maintenance > Business > Store > Store Settings** tab.
2. Select the **Credit Card group** located at the bottom of the screen.
3. Select the credit card lookup tender created in the prior procedure from the 'Credit Card Lookup ID' drop-down list to designate a pre-defined generic tender to search all active tenders based on the prefix number and detect the correct credit card type.
4. Click **Save** and exit the **Store** function.

Refreshing the data

After all settings are in place, 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. 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 Credit Card Lookup

After configuring the Credit Card Lookup feature, you can display a single credit card button on the FOH Tenders screen. Select the button to access a generic credit card screen and swipe the credit card, or enter the card number manually. The system searches the hard-coded prefixes of the credit card type, then continues with the process of applying a credit card payment.

To use the credit card lookup screen:

1. With the check appearing in the guest check window, touch the **credit card lookup** tender. The Enter the Credit Card Number screen appears.
2. Swipe the **credit card** across the mag stripe reader, or enter the **credit card number** using the numeric keypad, and touch **OK**. The screen for the corresponding credit card appears with the credit card number and expiration date populated. For example, if the system matched the prefix numbers to a Visa card, the Visa Card screen appears.
3. Enter the **requirements of the detected credit card**, such as the correct purchase amount and a tip.
4. Close the **check** as normal.

Credit Card Lookup in Table Service, 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