

Last Updated: June 24, 2024

About saving different cards to the same tab

In Aloha® Table Service, you can configure the Saved Card functionality to enable a bartender to slide a payment card, such as a credit card or a gift card, across a magnetic stripe reader (MSR) to name a new tab with the cardholder information encoded on the stripe. The system then temporarily saves the card information in memory for you to select the Saved Card button on the FOH Close screen and apply that card for tendering. This functionality greatly enhances a bar environment and enables a restaurant to capture the card number without the liability of holding the guest's physical card. Using the existing Saved Card functionality, you can now also save credit cards at the seat level, which is helpful when guests request separate seats on one tab.



Tip

To allow an employee to use the Split Checks function, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Split checks' under the 'Financial' group bar, and assign the access level to the employee.

In accordance of the PCI-DSS, you can show the first name and last name of the credit card assigned to the seat. Any credit card data saved locally purges after the check closes.

Configuring the ability to save different cards to the same tab

Configuring the ability to save different cards to the same tab requires you to (1) Configure pivot seating; (2) Configure a store to name a tab using a payment card; and (3) Configure a button using the Rename Tabs and Tables function.

To configure pivot seating:

1. Select **Maintenance > Labor > Jobcodes**.
2. Select a **jobcode**, such as 'Bartender,' from the drop-down list.

3. Select the **Order Entry** tab.

Order entry		
Order entry		<input checked="" type="checkbox"/>
Interface		<input checked="" type="checkbox"/>
Bartender		<input checked="" type="checkbox"/>
Cashier		<input checked="" type="checkbox"/>
Order taker		<input checked="" type="checkbox"/>
Check type	Tables and Tabs	
Require tab name		<input checked="" type="checkbox"/>
Pivot seating		<input checked="" type="checkbox"/>
Can get checks from other employees		<input checked="" type="checkbox"/>
Automatically return checks to original owner		<input type="checkbox"/>
Go directly to get check, followed by close screen		<input type="checkbox"/>
Automatically exit on close check		<input type="checkbox"/>
Allow item lookup		<input checked="" type="checkbox"/>
Allow add item		<input checked="" type="checkbox"/>
Prompt for order mode		<input checked="" type="checkbox"/>
Can start PMS check		<input type="checkbox"/>

4. Select **Pivot seating** to activate the pivot seating option.
5. Click **Save**.
6. Repeat this **procedure** for each job code that requires pivot seating.
7. Exit the **Jobcodes** function.
8. Continue to the **next procedure**.

To configure a store to name a tab using a payment card:

1. Select **Maintenance > Business > Store**.
2. Select the **Store Settings** tab.
3. Select the **Order Entry** group located at the bottom of the screen.

Guest Count		
List most recent tables first		<input checked="" type="checkbox"/>
Allow duplicate table numbers		<input checked="" type="checkbox"/>
Table look up method	Table ID	
Display check number		<input checked="" type="checkbox"/>
Tab naming method when card is swiped	Card name	
Name table using a magnetic card		<input checked="" type="checkbox"/>
Table naming method when card is swiped	Add card name to table	
Upon leaving Order Entry screen without Order Mode assigned	Assign items the default Order Mode	
Limit bartender to one tab at a time		<input type="checkbox"/>
Automatically name saved tabs with bartender initials		<input checked="" type="checkbox"/>
Automatically save current tab when New Tab is pressed		<input type="checkbox"/>
Automatically start new order for bartender when items are ordered		<input checked="" type="checkbox"/>
Display Fast Cash amount owed in huge font		<input checked="" type="checkbox"/>
Prompt for amount when using Fast Cash		<input type="checkbox"/>

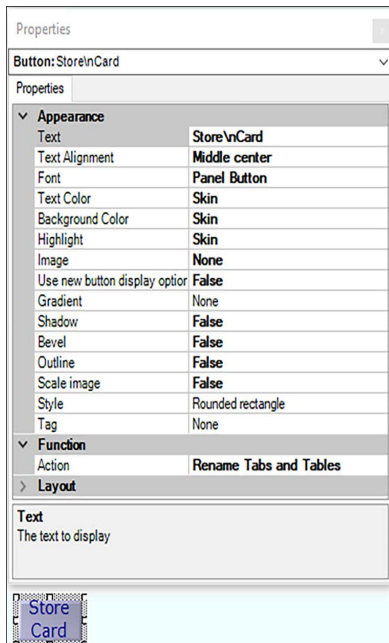
4. Under the 'Tabs and tables' group bar, select **Name table using a magnetic card** to allow you to name a

table using either the cardholder name or card number when you capture the credit card information.

5. Select **Add card name to table** from the 'Name table using a magnetic card' drop-down list.
6. Click **Save** and exit the **Store** function.
7. Continue to the **next procedure**.

To add a Rename Tabs and Tables button function to an order entry panel:

1. Select **Maintenance > Screen Designer > Table Service Screen Designer**.
2. Select **Panel > Open Panel** and select an order entry panel to edit. The panel appears in a fixed position at the bottom of the screen.
3. Select **Panel > New Button**.
4. Under the 'Function' group bar, select **Rename Tabs and Tables** from the 'Action' drop-down list.



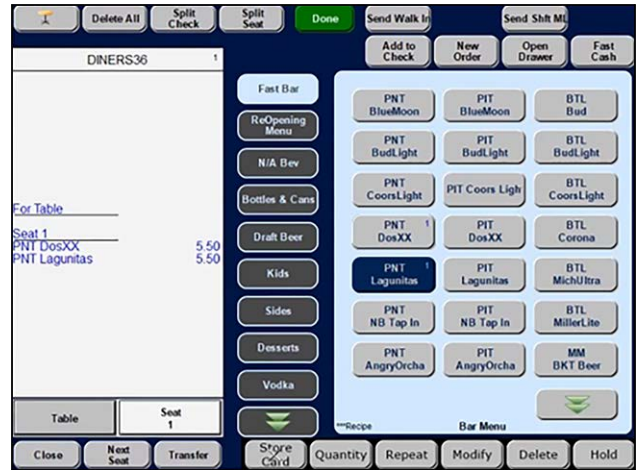
5. Under the 'Appearance' group bar, type a **name** for the button, such as 'Store Card.'
6. Configure the **remaining options** as you would for any other button
7. Select **Panel > Save Panel** and exit **Table Service Screen Designer**.

Saving different cards to the same tab

Scenario: Two guests arrive at the bar. One guest offers to pay for a round of drinks, and Seat 1. You start a tab, and two seats. After the guest who pays for the round of drinks and Seat 1 leaves, one more guest arrives at the bar.

1. Log in to the **FOH**. The order entry screen appears.
2. The first guest offers a **payment card**.

3. Using a PIN pad, slide, dip, or tap the **card**. The payment card names the tab and saves the credit card information.

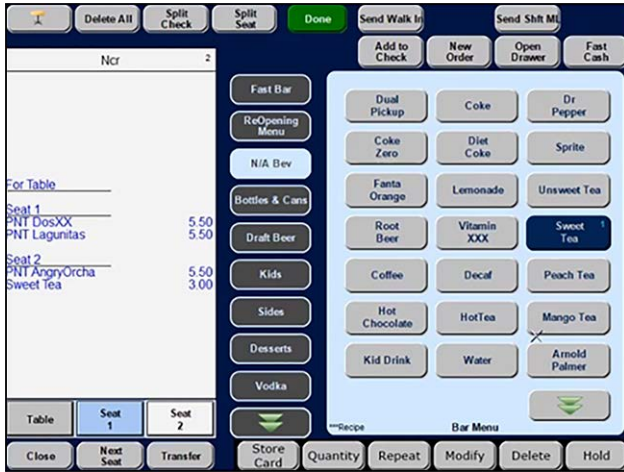


4. Add **menu items** for the first guest to 'Seat 1.'
5. (Optional) Touch **Store Card** to rename the tab. The Rename Tab screen appears.

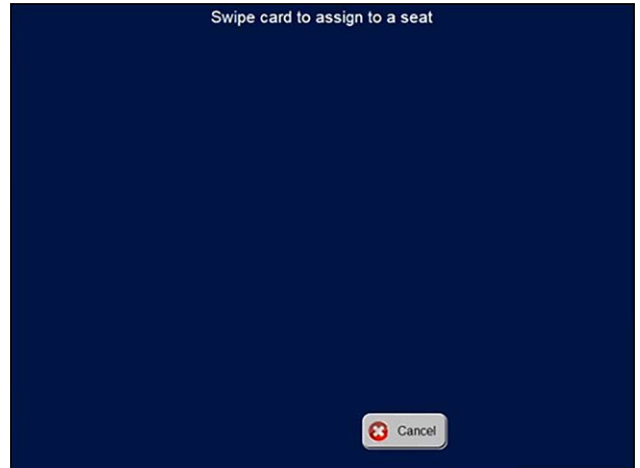


6. Using the alphanumeric keypad, rename the **tab** and touch **OK**.
7. Touch **Next Seat**. A new seat appears.

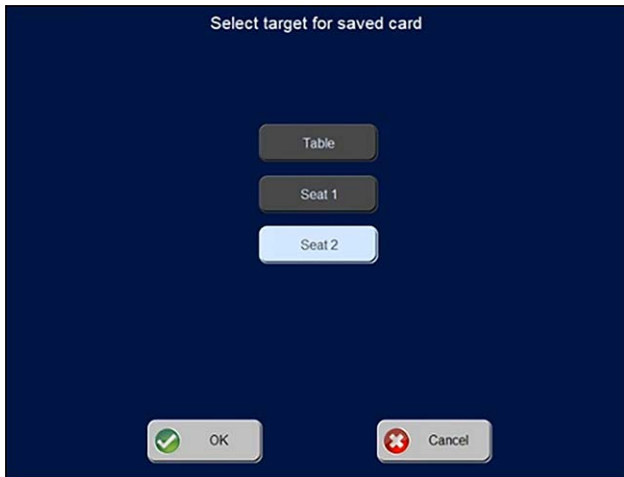
- With the new seat active, add **menu items** for the second guest in 'Seat 2.'



- Using a PIN pad, slide, dip, or tap the **card**. The screen dismisses after the card is captured.T



- The second guest offers a **payment card**.
- Touch **Store Card** again. The 'Select target for saved card' screen appears. T



- Repeat **steps 9 through 12** for any additional guests.
- From the order entry screen, touch **Done** or an **order mode** to send to the kitchen.

Tendering and closing separate seats

If all guests want to pay for their own meals, use the Split Checks feature. You cannot close seats individually, so you must make separate checks.

- Log in to the **FOH**, select the **check**, and navigate to the Close screen. The Tenders display by default.
- Touch **Split Checks**.

- Touch the **seat number** for which to save the card, and touch **OK**. The 'Swipe card to assign to a seat' screen appears.



- Touch **Add**.

4. Touch the **menu items** the second guest ordered from Check 1 and touch inside Check 2. The menu items move to Check 2.

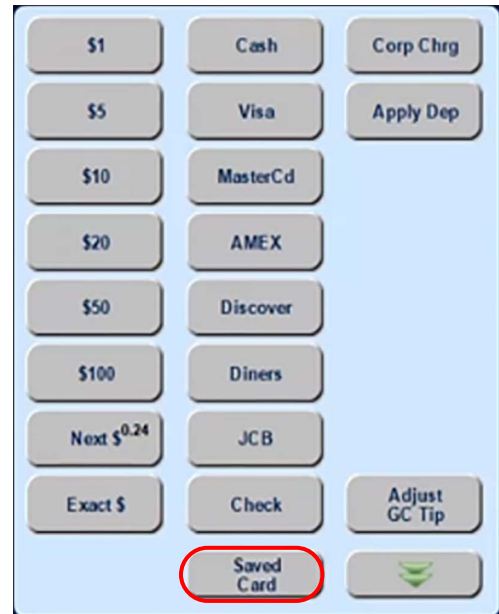


5. Touch **Add**.

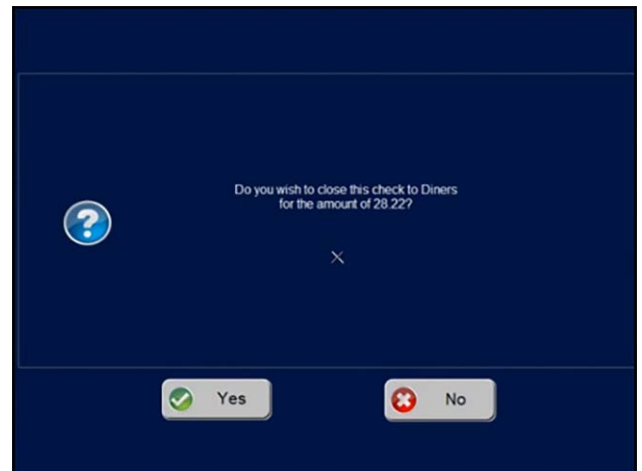


6. Touch the **menu items** ordered by the third guest in Check 1 and touch inside Check 3. The menu items move to Check 3.
7. Touch **OK** to dismiss the Split Checks screen and the Tender screen appears.

8. Select the **appropriate check** to tender. The Saved Card button appears in the Tenders screen, if a payment card is saved to a seat.



9. Touch **Saved Card**. A confirmation screen appears.



10. Touch **Yes**.
11. Touch **Close** to close the appropriate check.
12. Repeat **steps 10 through 12** until you close all separate checks. The Close button appears.
13. Touch **Close** to close the check.

Troubleshooting

If a guest produces an expired credit card during the capturing of the credit card information, the following error appears:



Touch **Cancel** to dismiss.