Feature Focus Guide: Givex Gift Cards

Core Product: [Product] Last Updated: June 13, 2024

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Revision Record

| Date | Version # | Description |
|------------------------|-----------------------|--|
| Prior to 02/02/2023 | QS v6.7+ EDC v6.7+ | Supported Givex gift cards using NCR Aloha POS. |
| | QS/TS v12.3+ | Updated the Givex Gift Card Feature Focus Guide to reflect CFC and new AM, and added the ability to support gift card activation and query |
| | QS/TS v15.1+ | Added the ability to allow a guest to cash out a Givex gift card. |
| | QS/TS v19.6+ | Increased the gift card digits to 24. |
| 02/02/2023 | | Converted document to use new templates. Updated the front cover and back page to reflect new NCR branding. |
| 06/12/2024 | | Updated document to reflect NCR Voyix branding. |



About Givex gift cards

| Givex Gift Cards Procedures at a Glance | | | |
|---|--|--|--|
| Core Product | uct Aloha Quick Service, Aloha Table Service, Aloha EDC | | |
| Complementary Products | No | | |
| Separate License Required? | equired? 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 EDC User Guide | | |
| Other Requirements | The Givex Aloha driver installed on each terminal requires routable Internet. | | |

Givex gift cards make great gifts for any occasion; they make it easy and convenient for your customers, and offer a valuable marketing opportunity for your restaurant. Remaining card balances bring customers back, and increase average ticket size. Small amounts that are never redeemed become pure profit to your restaurant. At the same time, you can track each Givex gift card, and you have direct access to information, such as how many cards were used, the average value spent, when and where the cards were used, and more.

Givex gift cards are plastic, magnetic-striped cards that replace the old-fashioned paper gift certificates, and operate very similarly to credit cards. You can purchase them from the vendor with a predetermined value, such as \$10.00, or as an open value card. An open value gift card lets the guest purchasing the card determine the value of the card. Once activated, each of these can have additional value added to them, if configured to do so.

When you are selling and redeeming Givex gift cards, the Aloha[®] Point-of-Sale (POS) system connects to the host for verification and authorization. If you are selling a new card, it is activated at this time. If you are redeeming a gift card, an immediate adjustment is made to the card balance at the host location. Therefore, with gift cards, you are able to maintain a higher level of control, security, and tracking capabilities.

Effective with Aloha POS v12.3 and EDC v12.3 and later, using a plug-in, you can now support the Givex gift card as a full service gift and loyalty card provider. This feature supports the following transactions:

- Activate card
- Add value
- Card balance

You must work with Givex to configure the GCM.ini file.



To support Givex gift cards, you must perform the following:

- Install the Givex Plug-In.
- Configure Givex/Private Label for Aloha EDC.

To accept 24-digit gift card numbers, you must update to the following:

- Aloha POS version to 19.6+.
- Aloha EDC to v19.4+.
- Givex plugin to v15.1.178+.

Although no configuration is necessary, you may need to access **Maintenance** > **Payments** > **Tenders** > **Identification** tab and update the Givex gift card number to 24-digits under the 'Identification' group bar.



Installing Givex gift cards

This section details the installation requirements for Givex Gift Cards. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Givex 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. | Verify prerequisites are complete. See <u>page 6</u> . |
|----|---|
| 2. | Install the Givex UPI Plug-In . See <u>page 7</u> . |

Use the following procedure to install Aloha Givex.

R Note

Givex provides the Givex Aloha driver, and the user name and password. Access Aloha Update to download the Givex UPI plug-in.

Givex requirements

There are requirements when using Givex gift cards.

- You must be on Aloha POS v12.3 and later.
- The terminals must be capable of sending traffic on port 50020 to the Internet.
- The terminals must have Service Pack 3 and C++ 2008; otherwise, the driver fails to install with error 1904.

Prerequisites: What you need to do before installing Givex

1. Install **EDC** v15.1 and later.

If you use Aloha Manager, select Uses Electronic Draft Capture under the Products installed group bar on the Global tab in Maintenance > Business > Installed Products. If you use Aloha Configuration Center, select Uses Electronic Draft Capture under the Products

installed group bar on the Global tab in Maintenance > Business > Global Administration.

- 2. Stop **EDC** before installing **Givex**.
- 3. Verify the following **EDC files** are in the BIN folder:

AlohaUPI.Core.dll

EdcSvr.UpiClient.Interop.dll

Log4net.dll

4. Run **GivexUPISetup.msi** in the setup folder. Choose the install location same as the **EDC.exe** (%IBERDIR%/Aloha/BIN folder)



© 2024 NCR Voyix. All rights reserved. NCR Voyix – Confidential Use and Disclose Solely Pursuant to Company Instructions The following files should be installed by setup in %IBERDIR%\BIN:

GivexAlohaUPI.dll

GCM.dll

GCM.ca

GCM.cert

GCM.ini

Copy Plugin.cfg from BIN folder to the same location as EDC.ini file (%IBERDIR%/Aloha/EDC folder).

Installing the Givex UPI plug-in

You must install the Givex UPI Plug-In prior to any configuration. Access alohaupdates.com to download this file. You need GivexUPISetup.msi, which installs all necessary files for the initial installation of Givex; the remaining files install through the Aloha POS system and Aloha Electronic Draft Capture.

1. Go to

https://www.alohaupdates.com/RadiantUpdatePortal/SignIn.aspx?ReturnUrl=%2fRadiantUpdate Portal%2fDefault.aspx.

- 2. Select NCR Customer or NCR Employee as the type of user and click Sign In.
- 3. If prompted, enter your **user name** and **password** and click **LOG IN**.
- 4. Select Download Install CD.
- 5. Select **Givex** from the 'Application Suite' drop-down list, and select the **most current version of the plugin** from 'Major Version.'
- 6. Click **Download Now** and save **GivexUPISetup.msi** to a staging folder.
- 7. Continue to the **next procedure**.



Launching the Givex plug-in setup wizard

After downloading GivexUPISetup.msi, follow the prompts to complete installation.

1. Locate and launch GivexUPISetup.msi.

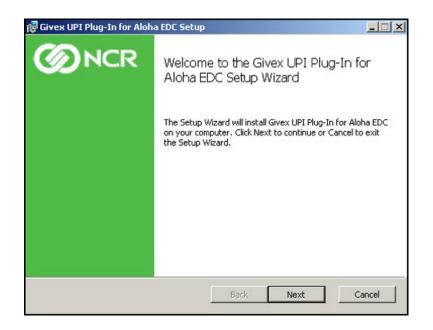
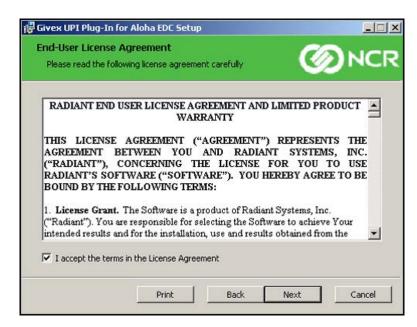


Figure 1 Givex UPI Setup Wizard

2. Click Next. The End-User License Agreement screen appears.







© 2024 NCR Voyix. All rights reserved. NCR Voyix — Confidential Use and Disclose Solely Pursuant to Company Instructions 3. Select I accept the terms in the License Agreement and click Next. The Givex UPI Plug-In for Aloha EDC Setup screen appears.

| Givex UPI Plug-In | for Aloha EDC Setup | | |
|------------------------------------|---|----------------------------------|---------------------|
| Custom Setup Select the way you | u want features to be insta | illed. | DNC |
| | e tree below to change th veX UPI plugin | e way features will be in: | stalled. |
| | | This feature requ hard drive. | uires 157KB on your |
| | | | Browse |
| Reset | Disk Usage | Back Ne | ext Cance |

Figure 3 Givex UPI Plug-In for Aloha EDC Setup

4. Click Next.

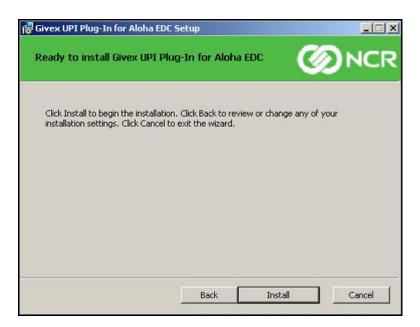


Figure 4 Ready to Install



5. Click Install. The Progress status bar screen appears.

|)NCF |
|--------|
| |
| |
| |
| |
| |
| |
| Cancel |
| |

Figure 5 Installing the Givex UPI Plug-In for Aloha EDC

6. Allow the **installation** to continue.

| 🗑 Givex UPI Plug-In for Aloha EDC Setup | | |
|---|---|------|
| | Completed the Givex UPI Plug-In for Aloha EDC Setup Wizard | |
| | Click the Finish button to exit the Setup Wizard. | |
| | | |
| | Back Finish Ca | ncel |

Figure 6 Installation Complete

7. Once the installation completes, click **Finish** to exit the Givex UPI Plug-In for Aloha EDC wizard.



A file called GCM.ini, located in the BIN folder, contains the connection parameters needed by the Givex driver to communicate with the Givex processor. You must configure the timeout, IP address, and IP port.

- 1. Navigate to the **%lberDir\BIN** folder.
- 2. Open **GCM.ini** using Notepad.
- 3. Edit the following **variables**, as shown below:

PRIMARY _MODE = 1

PRIMARY_TIMEOUT = 20 (Default)

PRIMARY_IP_ADDRESS = Enter the IP address provided by Givex. For example, 'dc-us1.givex.com.'

PRIMARY_IP_PORT = Enter the IP port provided by Givex. For example, '50019.'

PRIMARY_DIAL_COM =

PRIMARY_DIAL_BAUD =

PRIMARY_DIAL)INIT =

PRIMARY_DIAL_PHONE =

 $BACKUP_MODE = 1$

BACKUP_TIMEOUT = 20

BACKUP_IP_ADDRESS = Enter the IP address provided by Givex. For example, 'dc-us1.givex.com.'

BACKUP_IP_PORT = Enter the IP port provided by Givex. For example, '50019.'

BACKUP_DIAL_COM =

BACKUP_DIAL_BAUD =

BACKUP_DIAL_INIT =

BACKUP_DIAL_PHONE =

If you are testing Givex, add the **variables** provided by Givex:

- [TEST_SECTION]
- TEST_PARAMETER = 1
- 4. Close and save the **file**.



Configuring Givex gift cards

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

| - | u are viewing this document using Adobe Acrobat Reader, click each link for detailed information rding the task. |
|----|---|
| 1. | Access Maintenance > Business > Store > Store Settings tab > Gift Card/Certificate Sales group to configure the Givex gift card host. See page 14. |
| 2. | Access Maintenance > Menu > Items to configure items for selling Givex gift cards; one each fo activation and adding value. |
| | To activate a Givex predefined amount gift card, see <u>page 17</u> . |
| | To add value to a Givex predefined amount gift card, see <u>page 18</u> . |
| | To activate a Givex open amount gift card, see <u>page 20</u> . |
| | To add value to a Givex open amount gift card, see <u>page 22</u> . |
| 3. | Access Maintenance > Payments > Tenders to configure a tender for applying payment with a Givex gift card. |
| | To configure the <i>Tender</i> tab, see <u>page 24</u> . |
| | To configure the <i>Type</i> tab, see <u>page 27</u> . |
| | To configure the <i>Authorization</i> tab, see <u>page 28</u> . |
| | To configure the <i>Printers</i> tab, see <u>page 29</u> . |
| 4. | Access Maintenance > Electronic Draft Capture > Cards to assign Givex to gift cards. See page 30. |
| 5. | Access Maintenance > Screen Designer > Quick Service Screen Designer or Table Service Screen Designer to add buttons for selling and redemption to the front-of-house (FOH). |
| | Quick Service: |
| | To add a predefined amount gift card button for activation in QS, see <u>page 30</u> . |
| | To add a predefined amount gift card button to add value in QS, see <u>page 31</u> . |
| | To add an open amount gift card button for activation in QS, see page 32. |
| | To add an open amount gift card button to add value in QS, see <u>page 33</u> . |
| | To add a Givex gift card redemption button in QS, see <u>page 34</u> . |
| | Table Service: |
| | To add a predefined amount gift card button for activation in TS, see <u>page 36</u> . |
| | To add a predefined amount gift card button to add value in TS, see page 37. |
| | To add an open amount gift card button for activation in TS, see <u>page 38</u> . |
| | To add an open amount gift card button to add value in TS, see <u>page 39</u> . |



| Give | Givex Gift Cards Procedures at a Glance: | | | |
|------|--|--|--|--|
| 6. | Access Maintenance > Labor > Pos Access Levels to allow an employee to cash out a Givex gift card. See <u>page 40</u> . | | | |
| 7. | Select Utilities > Refresh POS & All Products to refresh the data. See <u>page 44</u> . | | | |



Configuring Givex as the processor for gift cards

You configure Givex as the processor for your gift cards in Aloha EDC; however, you must stop EDC processing first.

To configure Givex:

- 1. Select Maintenance > Electronic Draft Capture > Processor.
- 2. Click the New drop-down arrow, select Independent, and click OK.

| rocessor | | |
|------------------------------|-------------|----|
| Processor: 14 Givex Independ | ent 2 | - |
| cessor | | |
| Identification | | \$ |
| Number | 14 | |
| Name | Givex | |
| Active | V | |
| Index | 2 | |
| Turna | Independent | |
| Туре | Independent | |
| Independent | | \$ |
| | Givex | * |
| Independent | | * |

Figure 7 Electronic Draft Capture - Processor

- 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. Under the 'Identification' group bar, type **Givex** to identify the processor.
- 5. Select **Active** to activate the processor.
- 6. Under the 'Independent' group bar, select **Givex** from the 'Plugin type' drop-down list.
- 7. Type **Givex** as the file name.
- 8. Click **Save** and exit the **Processor** function.



Configuring the Givex gift card host

The Aloha POS system offers you the ability to prevent theft and abuse of gift cards; you can prevent the activation or redemption of a gift card on the same business day on which the card was activated and prevent the redemption of a gift card more than once in the same business day, unless with manager approval. Determine what you will allow or prevent for gift cards in Store Settings > Gift Card/Certificate Sales.

To configure the Givex gift card host:

- 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.

R Note

If the Gift Card/Certificate Sales group is not available, you must access **Maintenance** > **Business** > **Additional Features** and select 'Display gift card.' Or if using Aloha Configuration Center, log in as a corporate user and access **Maintenance** > **Business** > **Corporate Administration**. Log out and then log back in.

| Store: 1 Aloha Café | | - |
|---|------------------------------------|---|
| Location Information Licensing Custom Store Settings Aloha Manager | | |
| = Gift sales | | |
| Gift card/certificate provider | Private Label | 1 |
| - Printing properties | | |
| Card number masking method | Show last 4 digits on all vouchers | 3 |
| - Voucher | | |
| Print guest check message | | |
| Print large text | V | |
| Print tip line | | |
| Number of copies | 2 | |
| Text to print on voucher 1 | Store Copy | |
| Text to print on voucher 2 | Customer Copy | |
| Restrictions | | |
| Cannot redeem same gift card twice in a day | | |
| Cannot activate and redeem gift card on same day | | |
| Allow refund transactions for activations and reloads | | |
| Restrict multiple redemptions of the same gift card on a single check | | |
| Restrict multiple add values of the same gift card on a single check | | |
| Restrict activation of gift card until tendered | V | |
| 🗄 Aloha Stored Value | | |

Figure 8 Store Settings Tab - Gift Card/Certificate Provider Group

4. Under the 'Gift sales' group bar, select **Private Label** from the 'Gift card/Certificate provider' drop-down list.



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- 5. Under the 'Printing properties' group bar, select **Show last 4 digits on all vouchers** to determine the portion of the gift card number to print on the voucher.
- 6. Under the 'Printing properties > Voucher' group bar, select **Print guest check message** if you want a message to appear on the check.
- 7. Under the 'Restrictions' group bar, select **Cannot redeem same gift card twice in a day** to prevent the redemption of the same gift card more than once in the same business day.
- 8. Select **Cannot activate and redeem gift card on same day** to prevent the redemption of a gift card on the same business day on which the card is activated.

🖪 Note

To provide the ability to override these restrictions, select the appropriate access level in **Maintenance** > **Labor** > **Pos Access Levels** > **Access Level** tab and select 'Override gift card restrictions' under the 'Financial' group bar.

 Select Allow refund transactions for activations and reload to allow you to perform a refund for a customer who wishes to return a private label gift card they have purchased or remove additional funds loaded on their private label gift card.

B Note

You must select Private Label from the 'Gift card/certificate provider' drop-down list to enable this option. The system supports this functionality for Givex private label gift cards only.

- 10. Select **Restrict multiple redemptions of the same gift card on a single check** to prevent an employee from applying payments from the same gift card in increments to the same guest check. For example, you have a \$20.00 check. With this feature selected, the employee must apply the entire card to the amount; not in \$5.00 increments.
- 11. Select **Restrict multiple add values of the same gift card on a single check** to prevent an employee from adding multiple values to the same gift card on the same guest check.
- 12. Select **Restrict activation of gift card until tendered** to prevent the activation or reloading of a gift card until you receive payment and the guest check has a \$0.00 balance. If activation or reload fails, the Aloha POS system sends an immediate reversal to the guest check, preventing over-payment.
- 13. Click **Save** and exit the **Store** function.



Configure items for selling Givex gift cards

You must configure items for selling Givex gift cards. Typically, you configure an item to sell the gift card and an item to add value to a gift card. If you sell gift cards with a predefined amount, create two items for each; one for activating and the other for adding value to the card.

To activate a Givex predefined amount 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.
- 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**.

B Note

Make note of the item number; you will need it later.

| Item: 311 | 00 \$10 GC Activate Retail | - |
|---|-----------------------------------|---|
| em Pricing General Settings Print Display | y Options Quick Count | |
| Settings | | |
| Number | 31100 | 1 |
| Туре | Gift card | |
| Short name | \$10 GC Act | |
| Chit name | \$10 GC Act | |
| Chit name alternate | | |
| Long name | \$10 GC Activate | |
| Long name alternate | | |
| Button image | None | |
| Ask for description | | |
| | Activate card | |
| Gift card action | O Add value | |
| Export ID | 0 | |
| Assignments | | |
| Tax group | None | |
| Concept | None | |
| Sales/retail category | Retail | |
| Auto menu | | |
| 1 Priority | 1 Highest | |

Figure 9 Item Tab - Activate Predefined Gift Card

- 4. Under the 'Settings' group bar, type a **Short name**, such as '\$10 GC Act.'
- 5. Type a **Chit name**, such as '\$10 GC Act.'



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- 6. Type a Long name, such as '\$10 GC Activate.'
- 7. Select Activate card as the 'Gift card action' to activate the card upon approval.
- 8. Leave **None** as the 'Tax group.' Generally, gift cards are not taxable items.
- 9. Select the Sales/retail category, such as 'Retail'
- 10. Select the **Pricing** tab.

| Item: 31100 \$ | 10 GC Activate Retail | ▼ 📰 |
|--|-----------------------|-----|
| Item Pricing General Settings Print Display Op | tions Quick Count | |
| Pricing options | | |
| Eligible for fixed pricing | | |
| Pricing method | Item Price | - |
| Default price | 10.00 | |

Figure 10 Pricing Tab - Activate Predefined Gift Card

- 11. Select Item Price as the pricing method.
- 12. Type the **default price**.
- 13. Click **Save** and continue to the **next procedure**.

To add value to a predefined amount gift card:

- 1. While still in the **Items** function, click the **New** drop-down arrow, select **Gift card** from the 'Type' list box, and click **OK**.
- 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.



| Item: 311 | 02 \$10 GC Add Value Retail 💌 🧮 |
|---|---------------------------------|
| em Pricing General Settings Print Display | / Options Quick Count |
| Settings | |
| Number | 31102 |
| Туре | 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 | |
| Gift card action | O Activate card |
| Girt card action | • Add value |
| Export ID | 0 |
| Assignments | |
| Tax group | None |
| Concept | None |
| Sales/retail category | Retail |
| Auto menu | |
| 1 Priority | 1 Highest |

Figure 11 Item Tab - Add Value Predefined Amount Gift Card

- 3. Under the 'Settings' group bar, type a Short name, such as '\$10 GC Add.'
- 4. Type a Chit name, such as '\$10 GC Add.'
- 5. Type a Long name, such as '\$10 GC Add Value.'
- 6. Select **Add value** as the 'Gift card action' to activate the card upon approval.
- 7. Leave **None** as the 'Tax group.' Generally, gift cards are not taxable items.
- 8. Select the Sales/retail category, such as 'Retail'
- 9. Select the **Pricing** tab.



| Item: 31102 \$10 | GC Add Value Retail | - |
|---|---------------------|---|
| Item Pricing General Settings Print Display Optio | ns Quick Count | |
| Pricing options | | |
| 🛯 Eligible for fixed pricing | | |
| Pricing method | Item Price | - |
| Default price | 10.00 | |

Figure 12 Pricing Tab - Add Value Predefined Amount Gift Card - Pricing Tab

- 10. Select **Item Price** as the pricing method.
- 11. Type the **default price**.
- 12. Click **Save** and continue to the **next procedure**.

To activate an open amount gift card:

- 1. While still in the **Items** function, click the **New** drop-down arrow, select **Gift card** from the 'Type' list box, and click **OK**.
- 2. 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**.



| Item: 311 | 04 Open GC Activate Retail 🔹 🚽 |
|---|-----------------------------------|
| em Pricing General Settings Print Display | y Options Quick Count |
| Settings | |
| Number | 31104 |
| Туре | Gift card |
| Short name | Open GC Act |
| Chit name | Open GC Act |
| Chit name alternate | |
| Long name | Open GC Activate |
| Long name alternate | |
| Button image | None |
| Ask for description | |
| Gift card action | Activate card |
| Girt card action | O Add value |
| Export ID | 0 |
| Assignments | |
| Tax group | None |
| Concept | None |
| Sales/retail category | Retail |
| Auto menu | |
| 1 Priority | 1 Highest |

Figure 13 Item Tab - Activate Open Amount Gift Card - Item Tab

- 3. Under the 'Settings' group bar, type a **Short name**, such as 'Open GC Act.'
- 4. Type a Chit name, such as 'Open GC Act.'
- 5. Type a Long name, such as 'Open GC Activate.'
- 6. Select **Activate card** as the 'Gift card action' to activate the card upon approval.
- 7. Leave **None** as the 'Tax group.' Generally, gift cards are not taxable items.
- 8. Select the Sales/retail category, such as 'Retail'
- 9. Select the **Pricing** tab.



| Items | | |
|---|---------------|---|
| Item: 31104 Open GC Activ | ate Retail | • |
| Item Pricing General Settings Print Display Options Quick | Count | |
| Pricing options | | |
| Eligible for fixed pricing | | |
| Pricing method | Ask for Price | - |
| | | |
| | | |
| | | |

Figure 14 Pricing Tab - Activate Open Amount Gift Card

- 10. Select **Ask for Price** as the pricing method.
- 11. Click **Save** and continue to the **next procedure**.

To add value to an open amount gift card:

- 1. While still in the **Items** function, click the **New** drop-down arrow, select **Gift card** from the 'Type' list box, and click **OK**.
- 2. 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**.



| Item: 311 | 05 Open GC Add Value Retail 🔹 📰 |
|--|---------------------------------|
| em Pricing General Settings Print Displa | y Options Quick Count |
| Settings | |
| Number | 31105 |
| Туре | Gift card |
| Short name | Open GC Add |
| Chit name | Open GC Add |
| Chit name alternate | |
| Long name | Open GC Add Value |
| Long name alternate | |
| Button image | None |
| Ask for description | |
| Cift and action | O Activate card |
| Gift card action | • Add value |
| Export ID | 0 |
| Assignments | |
| Tax group | None |
| Concept | None |
| Sales/retail category | Retail |
| Auto menu | |
| 1 Priority | 1 Highest |

Figure 15 Item Tab - Add Value Open Amount Gift Card - Item Tab

- 3. Under the 'Settings' group bar, type a Short name, such as '\$10 GC Add.'
- 4. Type a Chit name, such as '\$10 GC Add.'
- 5. Type a Long name, such as '\$10 GC Add Value.'
- 6. Select **Add value** as the 'Gift card action' to activate the card upon approval.
- 7. Leave **None** as the 'Tax group.' Generally, gift cards are not taxable items.
- 8. Select the Sales/retail category, such as 'Retail'
- 9. Select the **Pricing** tab.



| Items | | |
|---|---------------|-----|
| Item: 31104 Open GC Activ | ate Retail | - 📰 |
| Item Pricing General Settings Print Display Options Quick O | Iount | |
| Pricing options | | |
| Eligible for fixed pricing | | |
| Pricing method | Ask for Price | • |
| | | |
| | | |
| | | |

Figure 16 Pricing Tab - Add Value Predefined Amount Gift Card

- 10. Select **Ask for Price** as the pricing method.
- 11. Click Save.

Configure a tender for applying a payment with a gift card

To redeem gift cards for purchases, you must define a gift card tender. You need only add one tender for gift cards. When you define the tender as a gift card, the options in the Tender function that do not pertain to gift cards become disabled. If your restaurant allows overpayment when redeeming a gift card, or refunding the full cash value of a gift card back to the guest without purchasing an item at the store, then you must define the tender to allow overpayment and provide cash back.

To configure the Tender tab of a Givex 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.
- 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**.



| Tenders | | |
|---|---|---|
| Tender: 50 \$10 GC | Gift card | • |
| Tender Type Identification Authorization Recond | iliation Printers Rounding | |
| E Settings | | |
| Number | 50 | |
| Name | \$10 GC | |
| Туре | Gift card | |
| 🜃 First available button position | | |
| Button position | None | |
| Button image | None | - |
| Report as | Current | • |
| Default amount behavior | Ask for amount | - |
| Active | | |
| Track | | |
| Affect deposit | | |
| Print check on close | V | |
| Open drawer on close | | |
| Print signature line | | |
| Combine on check | | |
| 🛯 🔯 Close check upon payment | | |
| 📕 🖉 Do not verify amount | | |
| Overpayment | والمتعالية والمتعالية والمتعاولية والمتعاولية والمتعاولة والمتعاولة والمتعاولة والمتعاولة والمتعاولة والمتعاولة | |
| Allow overpayment | | |
| Provide change | V | |
| 🗖 Tips | | |
| Allow tips | | |
| Maximum tip % | 20.00 | |
| Tip refund % | 0.000000 | |
| Remove tip line if auto gratuity | | |

Figure 17 Tenders - Tender Tab

- 4. Under the 'Settings' group bar, type a Short name, such as '\$10 GC.'
- 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 gift card tender.

- 6. Select an **image**, such as the gift card logo, to appear on the button in place of the name, from the 'Button image' drop-down list.
- Select the **tender** under which you want the credit card 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** if you want the credit card to report as itself.

8. Select **how the tender behaves** in the FOH when selected for payment from the 'Default amount behavior' drop-down list, if you want it to behave differently than the default choice of 'Ask for



© 2024 NCR Voyix. All rights reserved. NCR Voyix — Confidential Use and Disclose Solely Pursuant to Company Instructions amount.' The other choices are 'Next highest amount,' 'Exact amount due,' and 'Specific amount.'

- 9. 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.
- 10. Clear **Affect deposit** since credit cards do not affect the total cash amount you have on hand for deposit.
- 11. Select **Print check on close** to print a copy of the guest check at the time you close the check using this tender. To save paper, clear this option to turn off printing of the guest check at close in environments where you provide a copy of the guest check to the guest prior to applying payment. The guest typically does not require another copy of the guest check after you tender and close the check.
- 12. Select **Open drawer on close** to open the drawer each time you apply payment and close a check to this tender.
- 13. Clear **Print signature line**. Use this option for non-cash tenders for which you require a signature from the guest, such as 'House account' and 'Property management' tender types. Do not confuse this option as one having to do with signature line rules that control when to print signature lines on gift card vouchers.
- 14. For Table Service, clear **Combine on check**.
- 15. For Table Service, select **Close check upon payment** to automatically close a check when the payments applied to the check meet or exceed the guest check amount.
- 16. For Table Service, clear or select **Do not verify amount** to determine the placement of the cursor on the FOH tender screen and whether you are able to change the amount to something less than the balance of the check. When you select this option, cursor focus is always just below the amount and you are unable to change the amount at all. When you clear this option, cursor focus is on the amount. You can change the amount to something less than the balance of the check but attempts to change the amount to something greater result in an error message. If the tender allows tips, you can change the amount to something greater than the balance of the check; however, the system calculates the difference and moves the excess amount to the tip amount
- 17. Under the 'Tips' group bar, select **Allow tips** to allow guests to add a tip to the guest check and pay it with this credit card.
- 18. 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.
- 19. For Table Service, type the **percentage of tips** to recover from employees for the cost of processing the transaction in 'Tip refund %.' Enter the percentage as a number and two decimal places. For example, enter a percentage of 50% as 50.00.
- 20. Select **Remove tip line if auto gratuity** to not print a tip line on guest checks paid with this tender, if you add an automatic gratuity.
- 21. Continue to the **next procedure**.



To configure the Type tab of a Givex gift card tender:

1. Select the **Type** tab.

| Tenders | | |
|--|---------------|---|
| Tender: 50 \$10 GC Gift card | T | |
| Tender Type Identification Authorization Reconciliation Prin | ters Rounding | |
| E Type settings | | |
| Gift card provider | Private Label | • |
| Property management settings | | |
| Post to PMS | | |
| Options settings | | |
| Use magnetic card only | | |
| Expiration | | |
| Verify signature | | |
| Reduce points from Loyalty plans | | |
| 🔯 Display tender screen on card swipe | | |
| Display ID field first on tender screen | | |
| Display ID field first on tender screen | | _ |



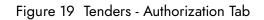
- 2. Under the 'Type settings' group bar, select **Private Label** as the gift card provider. Selecting a provider also selects 'Expiration,' which requires the entry of the expiration date when manually entering a credit card number.
- 3. Under the 'Options settings' group bar, select Use magnetic card only to prevent an employee from manually entering a credit card number without manager approval when applying this tender as payment. To override this setting for a certain employee and allow them to enter the number manually without manager approval, select 'Manual credit card number' for the appropriate access level in Maintenance > Labor > Pos Access Levels, and then assign that access level to the employee.
- 4. Clear **Expiration**. Givex gift cards are 'Track 2' only; they do not support expiration dates.
- 5. Select **Verify signature** to display a prompt reminding the employee to verify the signature on the card matches the signature on the gift card voucher.
- 6. For Quick Service, select **Display tender screen on card swipe** if you want the employee to verify the amount, or allow them to change the amount, applied to the card. If cleared, the system automatically sends the full amount of the transaction as soon as you slide the card across the reader.
- 7. If using select **Display ID field first on tender screen** to allow the Display ID field to appear first.
- 8. Click **Save** and continue to the **next procedure**.



To configure the Authorization tab of a Givex gift card tender:

1. Select the **Authorization** tab.

| Tenders | |
|---|--------|
| Tender: 50 \$10 GC Gift card | • |
| Tender Type Identification Authorization Reconciliation Printers Ro | unding |
| Authorization | |
| Print on check | V |
| Do not print vouchers | |
| Allow force authorization on Gift Cards | |
| Allow force authorization on fairt Carus | |
| | |
| | |



- 2. Under the 'Authorization' group bar, select **Print on check** to print the authorization code on the guest check.
- 3. Clear **Allow force authorization on Gift Cards**, as this does not apply to Givex gift cards. If you select this option, the system initiates a forced redemption on the gift card. EDC does not transmit to the EDC processor and returns a 'Not Supported' error message.
- 4. Continue to the **next procedure**.



To configure the Printers tab of a Givex gift card tender:

1. Select the **Printers** tab.

| ٦ | enders | | | | | | | |
|----|--------------------|-------|------------------------|---------------------|---------|-------------|------------|--------------------|
| | | | Tender: <mark>5</mark> | 0 \$10 GC Gift card | | | | - |
| Т | ender Type Ide | ntifi | cation Authorization | Reconciliation | rinters | Rounding | | |
| F | Printers | | | | | | | |
| A٩ | vailable | | | _ | Inclu | ded | | |
| D | rag a column head | ler I | nere to group by | | Drag | a column he | eader here | e to group by that |
| | Number | Δ | Name | 1 | Nu | umber | Δ | Name |
| ► | | 2 | Chipolte Kitchen | | | | 1 | WS1 Receipt |
| | | 3 | Label Printer | | | | | |
| | | 4 | Chipotle Kitchen 2 | | | | | |
| | | | | >> | | | | |

Figure 20 Tenders - Printers Tab

- 2. Select the **printer** from the 'Available' list box and click >> to move the printer to the 'Included' list box.
- 3. Click **Save** and exit the **Tenders** function.



Designating Givex as gift card processor

You must designate Givex as the processor for private label gift cards.

To designate Givex as the gift card processor:

1. Select Maintenance > Electronic Draft Capture > Cards.

| pendent | |
|---------|-----------------------------|
| × | |
| | |
| | |
| | |
| | s s pendent x s |

Figure 21 Cards Function - Gift Cards Group Bar

- 2. Under the 'Gift Cards' group bar, select Independent, from the 'Private' drop-down list.
- 3. Select **Givex** from the 'Private independent processor drop-down list.
- 4. Click **Save** and exit the **Cards** function.

Adding Givex gift card buttons to the FOH

This section details how to configure Givex buttons to display on the Front-of-House (FOH); it includes both Quick Service and Table Service instructions.

Selling Givex Gift Cards in Quick Service

Create buttons and add them to the FOH for selling. For this section, you will use the gift card items that you created in Maintenance > Menu > Items.

To add a predefined amount gift card button for activation in QS:

- 1. Select Maintenance > Screen Designer > Quick Service Screen Designer.
- 2. Select Work with Panels.



- Select Panel > Open Panel, select the panel containing your retail items, or a similar panel, and click OK.
- 4. Select an **available button** or right-click the **panel** and select **New Button**. The Properties dialog box appears.

| Tex | pearance t t Alignment | \$10\nGift Card\nActivate | |
|-------|------------------------------|---------------------------|--|
| Tex | | \$10\nGift Card\nActivate | |
| | t Alianment | | |
| Fon | | Middle center | |
| | | Custom | |
| _ | tom Font | Verdana, 11pt, style=Bold | |
| | t Color | Skin | |
| Bac | kground Color | Skin | |
| High | hlight | Skin | |
| Ima | ge | None | |
| Use | e new button display options | False | |
| Gra | dient | None | |
| Sha | wob | False | |
| Bev | rel | False | |
| Out | line | False | |
| Sca | e image | False | |
| Styl | e | Rounded rectangle | |
| Tag | 1 | None | |
| 3 Fur | Function | | |
| Acti | on | Order Item | |
| Item | 1 | \$10 GC Activate | |
| ∃ Lay | vout | | |

Figure 22 Predefined Amount for Activation Button

- 5. Under the 'Function' group bar, select **Order Item** from the 'Action' drop-down list.
- 6. Select the **predefined amount gift card item for activation** you created earlier from the 'Item' drop-down list.
- Under the 'Appearance' group bar, type a name for the button, such as '\$10 Gift Card Activate.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as '\$10\nGift Card\nActivate.'
- 8. Configure the **remaining options** as you would for any other button function.
- 9. Select **Panel > Save Panel**.
- 10. Repeat this **procedure** for every predefined amount gift card for activation.
- 11. Select File > Exit to exit Quick Service Screen Designer.

To add a predefined amount gift card button to add value in QS:

- 1. Select Maintenance > Screen Designer > Quick Service Screen Designer.
- 2. Select Work with Panels.
- 3. Select **Panel > Open Panel**, select the **panel** containing your retail items, or a similar panel, and click **OK**.



| ∃ Appearance | | |
|--------------------------------|----------------------------|--|
| Text | \$10\nGift Card\nAdd Value | |
| Text Alignment | Middle center | |
| Font | Custom | |
| Custom Font | Verdana, 11pt, style=Bold | |
| Text Color | Skin | |
| Background Color | Skin | |
| Highlight | Skin | |
| Image | None | |
| Use new button display options | False | |
| Gradient | None | |
| Shadow | False | |
| Bevel | False | |
| Outline | False | |
| Scale image | False | |
| Style | Rounded rectangle | |
| Tag | None | |
| ∃ Function | | |
| Action | Order Item | |
| Item | \$10 GC Add Value | |
| ∃ Layout | | |

Figure 23 Predefined Amount Add Value Button

- 5. Under the 'Function' group bar, select Order Item from the 'Action' drop-down list.
- 6. Select the **predefined amount gift card item to add value** you created earlier from the 'Item' drop-down list.
- 7. Under the 'Appearance' group bar, type a **name** for the button, such as '\$10 Gift Card Add Value.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as '\$10\nGift Card\nAdd Value.'
- 8. Configure the **remaining options** as you would for any other button function.
- 9. Select **Panel > Save Panel**.
- 10. Repeat this **procedure** for every predefined amount gift card to add value.
- 11. Select File > Exit to exit Quick Service Screen Designer.

To add an open amount gift card button for activation in QS:

- 1. Select Maintenance > Screen Designer > Quick Service Screen Designer.
- 2. Select Work with Panels.
- 3. Select **Panel > Open Panel**, select the **panel** containing your retail items, or a similar panel, and click **OK**.



| Properties | |
|---------------------------|-------------------------------|
| ⊟ Appearance | |
| Text | Open Amt\nGift Card\nActivate |
| Text Alignment | Middle center |
| Font | Custom |
| E Custom Font | Verdana, 11pt, style=Bold |
| Text Color | Skin |
| Background Color | Skin |
| Highlight | Skin |
| Image | None |
| Use new button display op | ptions False |
| Gradient | None |
| Shadow | False |
| Bevel | False |
| Outline | False |
| Scale image | False |
| Style | Rounded rectangle |
| Tag | None |
| Function | |
| Action | Order Item |
| Item | Open GC Activate |
| 🗄 Lavout | |

Figure 24 Open Amount Activation Button

- 5. Under the 'Function' group bar, select **Order Item** from the 'Action' drop-down list.
- 6. Select the **open amount gift card item for activation** you created earlier from the 'Item' drop-down list.
- Under the 'Appearance' group bar, type a name for the button, such as 'Open Amount Gift Card Activate.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as 'Open Amt\nGift Card\nActivate.'
- 8. Configure the **remaining options** as you would for any other button function.
- 9. Select **Panel > Save Panel**.
- 10. Repeat this **procedure** for every open amount gift card to activate.
- 11. Select File> Exit to exit the Quick Service Screen Designer.

To add an open amount gift card button to add value in QS:

- 1. Select Maintenance > Screen Designer > Quick Service Screen Designer.
- 2. Select Work with Panels.
- 3. Select **Panel > Open Panel**, select the **panel** containing your retail items, or a similar panel, and click **OK**.



| Pro | perties | | | |
|------------|--------------------------------|--------------------------------|--|--|
| Appearance | | | | |
| 1 | Text | Open Amt\nGift Card\nAdd Value | | |
| 1 | Text Alignment | Middle center | | |
| F | Font | Custom | | |
| Ð (| Custom Font | Verdana, 11pt, style=Bold | | |
| 1 | Text Color | Skin | | |
| E | Background Color | Skin | | |
| H | Highlight | Skin | | |
| 1 | mage | None | | |
| l | Use new button display options | False | | |
| (| Gradient | None | | |
| 9 | Shadow | False | | |
| E | Bevel | False | | |
| (| Dutline | False | | |
| Ş | Scale image | False | | |
| 9 | Style | Rounded rectangle | | |
| 1 | Tag | None | | |
| ΞF | Function | | | |
| ļ, | Action | Order Item | | |
| 1 | tem | Open GC Add Value | | |
| Ξl | Layout | | | |
| Te: The | xt e text to display | | | |

Figure 25 Open Amount Add Value Button

- 5. Under the 'Function' group bar, select **Order Item** from the 'Action' drop-down list.
- 6. Select the **open amount gift card item to add value** you created earlier from the 'Item' drop-down list.
- Under the 'Appearance' group bar, type a name for the button, such as 'Open Amount Gift Card Activate.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as 'Open Amt\nGift Card\nAdd Value.'
- 8. Configure the **remaining options** as you would for any other button function.
- 9. Select **Panel > Save Panel**.
- 10. Repeat this **procedure** for every open amount gift card to add value.
- 11. Select File> Exit to exit the Quick Service Screen Designer.

Redeeming Givex gift cards in QS

Create buttons and add them to the FOH for redemption. For this section, you will use tenders that you created in Maintenance > Payments > Tenders.

To add a Givex gift card redemption button in QS:

- 1. Select Maintenance > Screen Designer > Quick Service Screen Designer.
- 2. Select Work with Panels.
- 3. Select **Panel > Open Panel**, select the **panel** containing your tenders, and click **OK**.



| Button: Givex InGift Card | | | | |
|---------------------------|--------------------------------|-------------------------------------|--|--|
| Properties | | | | |
| | Appearance | _ | | |
| | Text | Givex \nGift Card | | |
| | Text Alignment | Middle center | | |
| | Font | Custom | | |
| | Custom Font | Microsoft Sans Serif, 8pt, style=Bc | | |
| | Text Color | Custom | | |
| | Custom Text Color | 0, 0, 160 | | |
| | Background Color | Custom | | |
| | Custom Background Color | 255, 128, 255 | | |
| | Highlight | Custom | | |
| | Custom Highlight Color | 7, 175, 46 | | |
| | mage | None | | |
| | Jse new button display options | False | | |
| | Gradient | None | | |
| | Shadow | False | | |
| | 3evel | False | | |
| | Dutline | False False | | |
| | Scale image | | | |
| | Style | Rounded rectangle | | |
| | Tag | None | | |
| | Function | | | |
| | Action | Tender | | |
| | Tender | Givex | | |
| | Open Drawer | False | | |
| IFI I | Layout | <u> </u> | | |

Figure 26 Redeeming Givex

- 5. Under the 'Function' group bar, select **Tender** from the 'Action' drop-down list.
- 6. Select Givex from the 'Tender' drop-down list.
- 7. Select **True** to allow the cash drawer to open or **False** to keep the cash drawer closed upon tender from the 'Open Drawer' drop-down list.
- Under the 'Appearance' group bar, type a name for the button, such as 'Givex Gift Card.' To display text on multiple lines, insert '\n' without spaces for line breaks, such as 'Givex\nGift Card.'
- 9. Select Panel > Save Panel.
- 10. Select File> Exit to exit the Quick Service Screen Designer.



Selling Givex gift cards in TS

Create buttons and add them to the FOH for selling. For this section, you will use the gift card items that you created in Maintenance > Menu > Items.

To add a predefined amount gift card button for activation in TS:

- 1. Select Maintenance > Menu > Submenus.
- 2. Select the **submenu** to contain the gift card item, such as 'Retail.'
- 3. Click an **available position**.

| Submenus | | | |
|---|---|---|--|
| Submenus: 1 | * | | |
| Submenu Layout | | | |
| Sobilierio Layout Cust Emp 20600 Tshirt \$10.00 602 2-Day Tix \$2000 600 Friday Tix \$2000 Concert A Shirt 20616 \$2000 Concert A Shirt 20617 \$3000 Concert A Shirt 20619 \$7.00 Copen GC Act 1002 \$10.00 Copen GC Add 1001 \$0.00 1003 | 1006 Upcharge \$0.30 601 Saturday Tix \$12.00 Concert Program \$25.00 20618 \$25.00 20621 \$13.00 1004 \$15.00 1005 \$15.00 | Item and pricing Type Item Price method Default price | Item Button \$10 GC Activate Item price 10.00 |
| Page up * Page down • Sor | t * Sort F | Consolidate | |

Figure 27 Predefined Amount Activate

- 4. Under the 'Item and pricing' group bar, select Item Button from the 'Type' drop-down list.
- 5. Select the **predefined amount gift card item for activation that you created earlier** from the 'Item' drop-down list.
- 6. Select Item price from the 'Price method' drop-down list.
- 7. Continue to the **next procedure**.



To add a predefined amount gift card button to add value in TS:

1. While still in the **Submenus** function, click the an **available position**.

| Submenus | | | | |
|--|--|---|---|---|
| | Submenus: 1 | 2 Retail | | • |
| Submenu Layout | | | | |
| Cust 20600 T=hirt \$10.00 602 2-Day Tix \$20.00 Concert A Shirt 20619 \$30.00 20619 \$7.00 100pen GC Act \$0.00 100pen GC Add \$0.00 | Emp 20615 T-Shirt \$7,00 600 Friday Tix \$12,00 Concert B Shirt 20617 \$30,00 20620 \$10,00 100\$10 GC Act \$10,00 \$10 GC AV 1003 \$10,00 | .30 Upcharge \$0.30 601 Saturday Tix \$12.00 Concert Program \$20018 \$12.00 20618 \$12.00 20621 \$13.00 1004 \$15.00 1005 \$15.00 1005 \$15.00 | Item and pricing Type Item Price method Default price | Item Button \$10 GC Add Value Item price 10.00 |
| Page up * P | age down 🔻 🛛 So | rt ▲ Sort ► | Consolidate | |

Figure 28 Predefined Amount Add Value

- 2. Under the 'Item and pricing' group bar, select Item Button from the 'Type' drop-down list.
- 3. Select the **predefined amount gift card item to add value that you created earlier** from the 'Item' drop-down list.
- 4. Select Item price from the 'Price method' drop-down list.
- 5. Continue to the **next procedure**.



To add an open amount gift card button for activation in TS:

1. While still in the **Submenus** function, click the an **available position**.

| Submenus | | | | I | |
|--|--|--|---|---|---|
| | Submenus: 1 | 2 Retail | | • | |
| Submenu Layout | | | | | |
| Cust 20600 Tshirt \$10,00 602 2-Day Tix \$20,00 Concert A Shirt 20616 \$30,00 20619 \$7,00 000 SC Act 1000 SC Act 1000 SC Act \$0,00 | Emp 20615 T-Shirt \$7,00 600 Friday Tix \$12,00 Concert B Shirt 20617 \$30,00 20620 Friday Tix \$30,00 20620 Friday Tix \$10,00 20620 Friday Tix \$10,00 20620 Friday Tix \$10,00 20620 Friday Tix \$10,00 20620 Friday Tix \$10,00 \$10,00 \$10,00 \$10,000 Friday Tix \$10,000 | 1006 Upcharge \$0.30 601 Saturday Tix \$12.00 Concert Program \$20018 \$12.00 20618 \$15.00 20621 \$13.00 1004 \$15.60 Act \$15.00 \$15.60 | Item and pricing Type Item Price method Default price | Item Button Open GC Activate Item price 0.00 | * |
| Page up * P | age down 🔻 🛛 So | rt 🔺 💦 Sort 🕨 | Consolidate | | |

Figure 29 Open Amount Activate

- 2. Under the 'Item and pricing' group bar, select Item Button from the 'Type' drop-down list.
- 3. Select the **open amount gift card item for activation that you created earlier** from the 'Item' drop-down list.
- 4. Select Item price from the 'Price method' drop-down list.
- 5. Continue to the **next procedure**.



To add an open amount gift card button to add value in TS:

1. While still in the **Submenus** function, click the an **available position**.

| Submenus | | | | |
|---|--|--|---|--|
| | Submenus: 1 | 2 Retail | | |
| Submenu Layout | | | | |
| Cust 20600 Tshirt \$10.00 602 2-Day Tix \$20.00 Concert A Shirt 20616 \$30.00 0000 \$7.00 1000 \$0.00 0000 \$0.00 | Emp 20615 T-Shirt \$7,00 600 Friday Tix \$12,00 20617 Shirt 20617 Shirt 20617 Shirt \$30,00 20620 Shirt \$10,00 1002 Act \$10,00 1003 C Act \$10,00 | 1006 Upcharge \$0.30 601 Saturday Tix 601 Saturday Tix 20618 \$12.00 Concert Program 20621 \$12.00 Concert Mug 20621 \$13.00 1004 \$15.00 1005 \$15.00 Avt \$15.00 | Item and pricing Type Item Price method Default price | Item Button Open GC Add Value Item price 0.00 |
| Page up * P | age down 🔻 🛛 So | rt ▲ Sort ► | Consolidate | |

Figure 30 Open Amount Add Value

- 2. Under the 'Item and pricing' group bar, select Item Button from the 'Type' drop-down list.
- 3. Select the **open amount gift card item to add value that you created earlier** from the 'Item' drop-down list.
- 4. Select Item price from the 'Price method' drop-down list.
- 5. Click **Save** and exit the **Submenus** function.

Redeeming Givex gift cards in TS

When you created the Givex gift card tender in Maintenance > Payments > Tenders, you designated a button to display in the first available button position, or selected an available position on the Tender screen. Refer to <u>"Configure a tender for applying a payment with a gift card" on page 24</u> for more information.



Supporting gift card activation and query by bar code scan

You can use a bar code scanner to scan a gift card for redemptions. To increase your speed-of-service, you can also use a bar code scanner to activate, add value to, and query the balance of, a gift card. Additionally, you can perform a refund using a bar code scanner for Givex gift cards.

Note

There is no configuration needed for this enhancement

Allowing a guest to cash out a Givex gift card

In many states, you must allow a guest to receive the remaining funds on a gift card in the form of immediate cash out. You can configure your Givex processor to allow a guest to cash out their Givex gift card, upon request. This feature allows you to return the remaining card balance to the guest without opening a guest check, as long as the amount falls within regional restrictions. You can also control who can perform the cash out function. The Givex cash out information appears on the Audit Report, as well as the Employee Checkout report, the Drawer Paid Out report, the Drawer Payments report, and the Server Sales report.

Note

Regional laws limit the amount of cash out a guest can receive back from a Givex gift card. There is no configuration required for this limitation; the Givex processor handles the regional laws limiting how much cash is approved for cash back on a gift card.



Configuring Givex cash out

To configure the Givex cash out feature, you must provide an appropriate employee with the appropriate access level, create a 'Gift card cash out' petty cash account, and a 'Gift card cash out' button.

To provide the ability to cash out a Givex gift card:

- 1. Select Maintenance > Labor > Pos Access Levels.
- 2. Select the **access level** to which you want to allow the ability to cash out a Givex gift card.

| 5 Access Level: 2 Manager | | |
|--|--------------|--|
| ess Level | | |
| 🥸 Resend failed credit card transaction | | |
| Override gift card restrictions | \checkmark | |
| Enable cash out from gift card | | |
| Approve additional Aloha Loyalty member transactions | V | |
| Approve manual Aloha Loyalty card number | \checkmark | |
| Approve Aloha Loyalty card assignment | \checkmark | |
| Approve Aloha Loyalty member lookup | | |
| Apply tax exempt | V | |
| Restricted tender group for this access level | None | |
| Verride maximum number of refills | | |
| Assign price change | V | |
| 🖉 Edit event tax | V | |
| 🙀 Approve Family Style meals | V | |
| Override split check limits | | |
| Edit price change events | | |
| Override EMV verifications | | |
| 🙀 Distribute Sales and Tips | | |
| Manage Sales and Tip Distribution Teams | | |

Figure 31 Pos Access Level - Financial Group Bar

- 3. Under the 'Financial' group bar, select **Enable cash out from gift card** to allow employees assigned to this access level to use a 'Gift card cash out' button to provide cash back to a guest requesting the balance of a gift card in the form of cash; this feature does not require an open guest check.
- 4. Click Save.
- 5. Repeat this **procedure** for each access level requiring the ability to cash out a Givex gift card.
- 6. Exit the **Pos Access Levels** function.

To assist with employee reporting at checkout of cash given to guests requesting the balance of a Givex gift card in cash back, create a petty cash account specific to Givex cash out. The button you create to provide the cash back ties back to this petty cash account.



To create a petty cash account specifically for providing cash back on Givex gift cards:

- 1. Select Maintenance > System Settings > Petty Cash Account.
- 2. Click the **New** drop-down arrow, select **Paid out** from the 'Type' list box, and click **OK**.
- 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**.

| Petty Cash Account: 10 Give | x Cash Out | - |
|-----------------------------|----------------|---|
| Petty Cash Account | | |
| Settings | | |
| Number | 10 | |
| Name | Givex Cash Out | |
| Account type | Paid out | |
| Ask for description | | |
| Affects total cash owed | | |
| Report as non-cash tender | None | - |

Figure 32 Givex Cash Out Petty Cash Account

- 4. Type a **name**, such as 'Givex Cash Out,' for the petty cash account.
- 5. Configure the **remaining options** as you would for any other petty cash account.
- 6. Click **Save** and exit the **Petty Cash Account** function.

Create a Givex Cash Out button to provide a means for contacting the Givex processor to obtain the remaining balance on a gift card when a guest requests the balance back as cash out.

To add a Givex Cash Out button:

- 1. Select Maintenance > Screen Designer > Quick Service Screen Designer or Table Service Screen Designer.
- 2. Select **Work with Panels**.
- 3. Select Panel > Open Panel.
- 4. If using Quick Service, select a panel of your choosing and click OK.
- 5. If using Table Service, you must select a floor plan panel to edit, and click OK.



6. Select an **available button** or create a **new button**. The Properties dialog box appears.

| Pro | perties | × |
|-----|--|-----------------------------|
| Bư | tton: Givex\nCash\nOut | • |
| Pr | operties | |
| | Appearance | <u> </u> |
| | Text | Givex\nCash\nOut |
| | Text Alignment | Middle center |
| | Font | Panel Button |
| | Text Color | Skin |
| | Background Color | Skin |
| | Highlight | Skin |
| | Image | None |
| | Use new button display c | False |
| | Gradient | None |
| | Shadow | False |
| | Bevel | False |
| | Outline | False |
| | Scale image | False |
| | Style | Rounded rectangle |
| | Tag | None |
| | Function | |
| | Action | Gift Card Cash Out |
| | Processors | Private Label 📃 |
| | Petty Cash Account | Cash Out |
| Ŧ | Layout | _ |
| P | rocessors | |
| | ends a message to an ext ut from gift card. | ernal processor to get cash |

Figure 33 Givex Cash Out Button

- 7. Under the 'Function' group bar, select Gift Card Cash Out from the 'Action' drop-down list.
- 8. Select Private Label from the 'Processors' drop-down list.
- Select the petty cash account created specifically for Givex from the 'Petty Cash Account' drop-down list.
- 10. Under the 'Appearance' group bar, type a **name** for the button, such as 'Givex\nCash\nOut;' to display text on multiple lines, insert '\n' without spaces for line breaks.
- 11. Configure the **remaining options** as you would for any other button.
- 12. Select Panel > Save All Panels.
- 13. Exit the Screen Designer function.



Refreshing the data

Once you configure the necessary features for Givex, you must refresh the Aloha POS system, then stop, and restart EDC Service (EDCSvr). 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. *Note:* If you run the refresh prior to the EOD process, select 'Automatically restart all Aloha POS terminals' and click OK to continue. After the data refresh is complete, all new settings become operational across the Aloha network.

A (

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.

Go to Windows Services, select EDC Service to stop and then restart.

To stop POS processing in Aloha EDC:

- 1. Navigate and log in to Aloha EDC.
- 2. Select **File > Stop POS Status Processing**, or click the **On** toggle button to end the POS Status Processing. *Note:* Do not skip this step as it is necessary when making changes to Aloha EDC.
- 3. After the Aloha EDC has stopped, select **File > Start POS Status Processing**, or click the **Off** toggle button to restart the POS Status Processing.



Using Givex gift cards

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

Important

Givex does not allow offline transactions.

If you are required to enter the gift card using a magnetic card reader, and the card is unreadable, someone with sufficient access must enter the card manually.

Redeeming Givex gift cards

1. Enter items as usual.



Figure 34 Tender Screen

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- Return Print Print All Exit Promo Comp Payment QA 3/Check 1 Cash Master Check VISA Exact \$ Account Next \$ DISCOVER Valutec Seat 1 om1 RoastBeef 3.00 om1 RoastBeef 3.00 AMERICAN \$1.00 Generic Complete Subtotal 6.00 \$5.00 Diana Chil Valuelink 2 Items Pre \$10.00 Debit Card **JCB** Subtotal 6.00 Tax 0.45 Increase Auth \$20.00 Givex Total 6.45 Print Auth \$50.00 Paymentech AR Balance Due \$6.45 Close Out Auth Member Report Assign Member 1 Customer Tax Add/Edit Gratuity Delete Adjust Force Reprint Exempl
- 2. Navigate to the **Tenders** screen containing Givex.

Figure 35 Tender Screen

3. Touch **Givex**. The Givex screen appears.



| | | | Ċ | Givex | | | |
|--------------------------------|--------------|------------|-------------|----------|----|---|--|
| | | Amou | nt: \$6.45« | | | | |
| QA 3/Check 1 | 1 1 | Tip | 5: \$0.00 | | | | |
| | | Card Numbe | r: | | | | |
| om1 RoastBeef om1 RoastBeef | 3.00 3.00 | | | | | | |
| Complete Subtotal | 6.00 | | 1 | 2 | 3 | | |
| 2 Items | | | | \equiv | | / | |
| Subtotal Tax | 6.00 0.45 | | 4 | 5 | 6 | | |
| Total | 6.45 | | 7 | 8 | 9 | | |
| Balance Due | \$6.45 | | Clear | 0 | ок | | |
| | | | | | | | |
| | | | | Cancel | | | |

Figure 36 Givex Redemption Screen

- 4. To accept the amount, touch **OK**.
- 5. Enter a **tip**, if applicable.
- 6. Touch **OK**.
- 7. Enter the Givex **gift card number**, and touch **OK**.



| Return Print P | Print All | Exit | | Payment Pr | romo Comp |
|------------------------------------|-----------|-------------------|----------|------------|--------------------------|
| QA 3/Check 1 | 1 | | Cash | MasterCord | Check |
| Seat 1 | | | Exact \$ | VISA | Account |
| om1 RoastBeef | 3.00 | | | | |
| om1 RoastBeef | 3.00 | | Next \$ | DISCOVER | Valutec |
| Complete Subtotal | 6.00 | | \$1.00 | AMERICAN | Generic |
| 2 Items | | | \$5.00 | Disen Cal | Valuelink |
| Subtotal | 6.00 | | 30.00 | beamarna | Valuenna |
| Tax | 0.45 | Pre | \$10.00 | Debit Card | JCB |
| Total | 6.45 | Increase | | | |
| Givex | \$6,45 | Auth | \$20.00 | | Givex |
| 60362879644161482140 Processing | ••• | Print Auth | \$50.00 | Paymentech | AR |
| Balance Due | \$6.45 | Close Out Auth | | | \ |
| 1 | | | Customer | | ember Assign Member |
| Delete Adjust | Force | Reprint | | | Tax Add/Edit Gratuity |

Figure 37 Processing Givex Gift Card

8. Close the **check**.

Cashing out a Givex gift card

- 1. A guest hands you a **Givex gift card**, requesting the remaining balance of the gift card in cash back.
- 2. Locate and touch the **Givex Cash Out** button. If your access level allows you to perform this function, the Please Enter Card screen appears; otherwise, the manager approval screen appears.
- 3. Slide the **gift card** through the magnetic stripe reader or manually enter the **gift card number and touch OK.** The system sends a request to the Givex processor, which then provides the available cash back amount, or displays an error message if the amount is outside the regional restrictions.
- 4. If the balance remaining is within the regional restrictions, note the **amount**, touch the **message** to dismiss it, and hand an **amount equal to the balance** of the gift card to the guest.



Activating a Givex gift card

- 1. Navigate to the screen where the Givex activation button exists.
- 2. Touch Givex Activate. An Open Item screen appears.
- 3. Enter the **amount** and touch **OK**. The Givex Activate screen appears with the activation amount auto-populating.

| Giver Amo | Activate | | x |
|--------------|-----------|-----------|----|
| Give | « Number: | | |
| | 1 | 2 | 3 |
| | | | |
| | 4 | 5 | 6 |
| | 7 | 8 | 9 |
| | # | 0 | |
| | CLEAR | BACKSPACE | рк |
| | | CANCEL | |
| | - | | |

Figure 38 Givex Activate Screen

4. Slide the **Givex gift card**. The card is now activated. Depending upon the configuration, the system returns you to the WWT or main menu screen.

Adding value to a Givex gift card

- 1. Navigate to the screen where the Givex add value button exists.
- 2. Touch Givex Add Value. An Open Item screen appears.



3. Enter the **amount** and touch **OK**. The Givex Add Value/Activate screen appears with the activation amount auto-populating.

| Givex | Activate | | x |
|-------|-----------|-----------|---|
| Amo | unt 20 | | |
| | | | |
| Give | x Number: | | |
| | | | |
| | 1 | Z | 3 |
| | | | |
| | 4 | 5 | 6 |
| | | | |
| | 7 | 8 | 9 |
| | | | |
| | # | 0 | 1. A. |
| | | | |
| | CLEAR | BACKSPACE | ок. |
| | | | |
| | | CANCEL | |
| | - | | |

Figure 39 Givex Activate Screen

4. Slide the **Givex gift card**. The card has value added. Depending upon the configuration, the system returns you to the WWT or main menu screen.



Determining the balance of a Givex gift card

Navigate to the screen where the Givex Balance button exists.

1. Touch Givex Balance. The Givex Balance Check screen appears.

| Givex Balance | | X |
|---------------|-----------|----|
| | | |
| | | |
| Givex Number: | | |
| | 1 | |
| 1 | 2 | 3 |
| | | |
| 4 | 5 | 6 |
| | | |
| 7 | 8 | 9 |
| | | |
| # | D | |
| | | |
| CLEAR | BACKSPACE | ок |
| | | |
| | CANCEL | |
| | | |

Figure 40 Givex Balance Screen

2. Slide the **Givex gift card** or manually enter the **card number** and then touch **OK**. The Aloha Givex Details screen appears.

| Aloha Giv | /ех 🔀 |
|-----------|--|
| i) | Givex 603628xxxxx5579907 Balance: \$80.16 Points Balance: 83 |
| | OK |

Figure 41 Aloha Givex Details Screen

3. Provide the **information** to the guest and then touch **OK** to close the Aloha Givex dialog box.



Reporting Givex gift cards

Givex is available on the following reports: Payment Detail and Audit. See below for examples.

| Aloha Café 5555 Fifth Avenue Naples, FL 34102 | 2 South | Pay | Payment Detail Report 07/29/2014 | | | Page 1 08/23/2014 – 10:07 Printed by: Seeded Administra | |
|---|---------|-----|-------------------------------------|----------|-------|---|--------------|
| | | | **** PAYME | ENTS**** | | | |
| | | | *** Casł | *** | | | |
| Check # | Card # | Exp | Qty | Amount | Tip | Total | Emp |
| 10002 | | | 1 | 100.25 | 10.00 | 110.25 | Tufo, Marcus |
| Total Cash: | | | 1 | 100.25 | 10.00 | 110.25 | |
| | | | *** Givex | *** | | | |
| Check # | Card # | Exp | Qty | Amount | Tip | Total | Emp |
| 10003 | | | 1 | 17.25 | 0.00 | 17.25 | Tufo, Marcus |
| Total Givex: | | | 1 | 17.25 | 0.00 | 17.25 | |

Figure 42 Payment Detail Report Example

| lloha Café 555 Fifth Avenue South Iaples, FL 34102 | | Audit Report 07/29/2014 | Page 1 of 1 08/23/2014 – 10:07 AM Printed by: Seeded Administrator | |
|--|----------------|---|--|--|
| | | **** PAYMENTS**** | | |
| | | *** Cash *** | | |
| Time | Туре | Transaction | | |
| 03:48 PM | APPLY PAYMENT | Givex on q3-1 Chk 10003 by 132 Marcus 17.25 Tip 0:00 | | |
| 03:49 PM | DELETE PAYMENT | Mgr: 126 Clay Emp: 132 Marcus on q3-1 Chk 10003 Givex 17.25 Tip 0:00 | | |
| 03:52 PM | APPLY PAYMENT | Cash on q3-2 Chk 10002 by 132 Marcus 100.25 | | |
| 03:53 PM | APPLY PAYMENT | Givex on q3-1 Chk 10001 by 132 Marcus 12.25 Tip 0:00 | | |

Figure 43 Audit Report Example



Troubleshooting Givex gift cards

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

If you have issues with Givex, check the GCM.log.

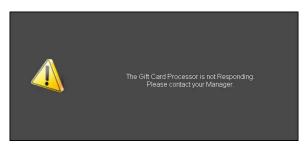


Figure 44 Gift Card Processor Not Responding

If this error message appears, there is an issue with the Givex configuration. Touch to dismiss error message.



Figure 45 Processor Not Configured

If this error message appears, you must configure Givex as the gift card provider.



Givex Gift Cards

NCR 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: <u>Hospitality.HSR@ncr.com</u>

