Feature Focus Guide: Round It Up America

Core Product: Aloha Quick Service, Aloha Table Service
Last Updated: December 15, 2023

Contents

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Revision Record

Date	Version #	Description
Prior to 07/07/2022	v6.7+	Implemented support for Round It Up Integration.
	v13.1	Revised list of zip files, and updated the Adding a Button to Launch Round it Up America section.
	v14.1	Added two new optional settings for the Custom tab.
	v14.2	Added three new custom variables for the Custom tab.
	RIUA plugin	Added support for Connected Payments in Round It Up America.
	v15.1+	Added manifest information due to least privilege. Also added instructions for configuring feature in Quick Service. Provided additional tips for when the charity line does not print on the voucher.
07/07/2022		Converted document to use new templates.
01/12/2023		Updated front cover and back page to reflect new NCR branding.
02/17/2023		As of this date, we only support Giving.exe v2.4.1. Added the ability to round up the amount before apply payment, using a new custom setting. With this new setting, you can also use RIUA with cash payments.
03/06/2023		Updated contact information for Round It Up America.
11/16/2023		Updated document to reflect NCR Voyix branding.

About Round It Up America

Round It Up America at a Glance	
Core Product	Aloha Table Service, Aloha Quick Service
Supported Version	Giving.exe v2.4.1+
Complementary Products	None
Separate License Required?	No
Other References	Aloha Table Service Reference Guide, Aloha Table Service Report Guide, Aloha Quick Service Reference Guide, Aloha Quick Service Report Guide

The Round It Up America (RIUA) program is a simple program that invites restaurant patrons to donate pocket change by rounding up their purchases to the nearest dollar, or a specified amount. While the individual donations may be nominal, their collective sum is powerful. RIUA is designed to serve as a platform to centralize company giving and supports both national and local non-profit agencies. Today there are thousands of locations (Mission Partners) participating in the program. The RIUA website http://rounditupamerica.org/ showcases the power of this initiative.

How does it work?

After signing a contract with the RIUA program, you must work with the Aloha® reseller partner or account manager to obtain the necessary files and implement the solution. After implementation, consumers write the amount they wish to donate on a designated line on the guest check or voucher, which you enter on the Close screen. Donation totals are available on the employee checkout report and the Aloha daily Sales Report to track Round It Up America obligations.

If you have any prospects or customers interested in participating, or have additional questions, please contact Michelle McCarthy, Executive Director of Round It Up America, at 855-554-RIUA or mmccarthy@rounditupamerica.org.

> **Note:** This feature works with both Table Service and Quick Service; however, the configuration is slightly different for each, as noted in the document.

Configuring Round It Up America

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

Round It Up America Procedures at a Glance:
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.

1.	Get started with Round It Up America by performing the following: ● Copy the **installation file** to the Back-of-House (BOH) server and run the installer. See page 6. ● Access **NCR Aloha RAL Site Admin Configuration** screen and validate the encrypted RIUA file is installed by RAL. See page 7.
2.	Access **Maintenance > Menu > Items** to create a 'Charitable Giving' open item. See page 8.
3.	Access **Maintenance > Business > Store > Custom** tab to add custom variables to Round It Up America. See page 10.
4.	Add a button to launch the Charitable Giving screen. ● Locate and right-click **TSButton.cfg** in the Newdata folder, to add a button that launches Round It Up America to the Table Service Close screen. See page 13. ● Select **Maintenance > Screen Designer > Quick Service Screen Designer** to add a button to the Quick Service tender screen. See page 14.
5.	Access **Maintenance > Messaging > Guest Check Message** and create a message to add to the guest check that offers an opportunity to donate, and another message to print on the credit card voucher that provides instructions on how to contribute. (Optional) **Note: If using Connected Payments, the instructional message that prints on the voucher may not be beneficial.** See page 14.
6.	Access **Utilities > Refresh POS & All Products** to refresh the data. See page 19.

Installing Round It Up America

To get started with Round It Up America, you must perform the following:

- Install RIUA.
- Validate the encrypted RIUA file is installed on the Aloha Front-of-House (FOH) terminals by RAL.

Installing Giving.exe

Aloha reseller partners and direct offices have access to the necessary files for implementing Round It Up America. Upon obtaining the installation file provided by your account representative, run the installer on the BOH site controller.

To install Giving.exe:

1. Copy the **Giving.exe installation file** to the BOH server.
2. Right-click on **Giving.exe** to run the installation. Once the installation is successful, verify the following files are present in the Aloha/Bin directory.
   - Giving.exe
   - Aloha.Giving.PI.dll
   - Aloha.Giving.PI.dll.config
   - Interop.Aloha.Giving.dll
   - Interop.INTERCEPTPRINTINGLib.Aloha.Giving.dll
3. Navigate to **Control Panel > Programs and Features** and verify Aloha Giving is listed.

> 💡 **Tip:** You can also use this path to uninstall Aloha Giving, if needed.

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Validating the encrypted file is installed by RAL

Next, you need to validate if the encrypted file is installed on the FOH terminals by RAL. Depending on the RAL version installed on your system, the button on the NCR Aloha RAL Site Admin Configuration screen appears as 'Manifests' or 'Package.'

To validate the encrypted file is installed by RAL:

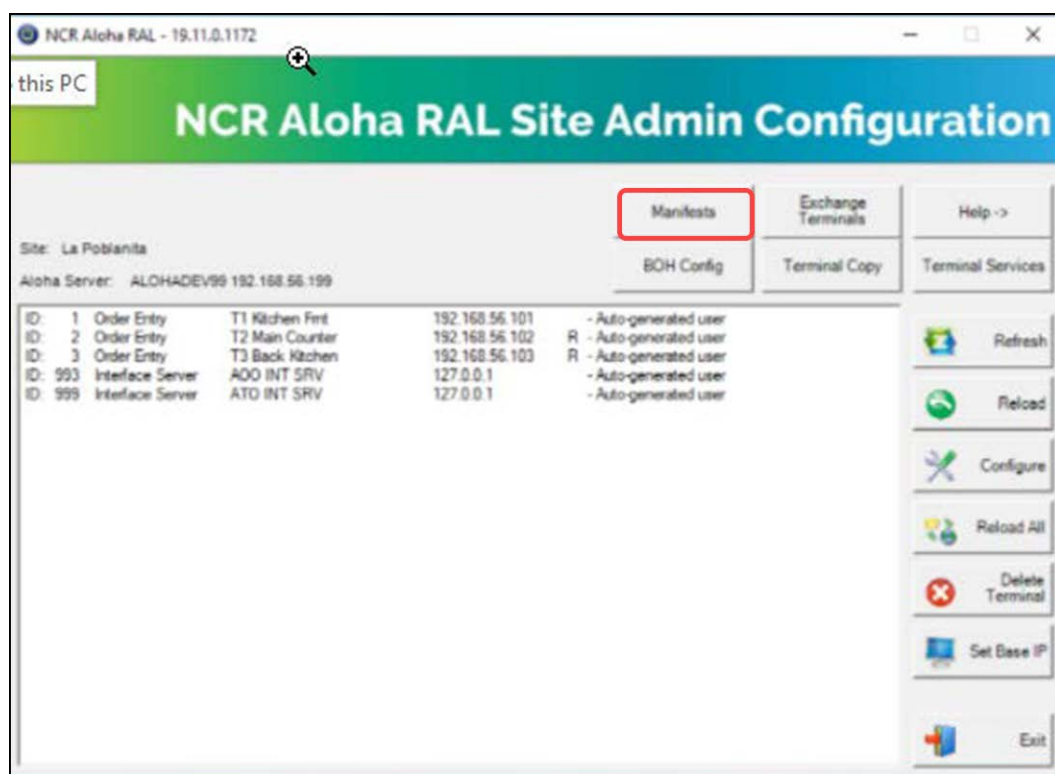1. Double-click the **Aloha Admin UI** icon. The **NCR Aloha RAL Site Admin Configuration** appears.

Figure 1 NCR Aloha RAL Site Admin Configuration Screen

2. Click **Manifests** or **Package**, depending on the RAL version in use. The appropriate screen appears.
3. Verify **RoundItUpAmerica** appears in the Active list for all terminals.
4. Click **Exit** to exit the **Manifest Configuration** screen.
5. Exit the **NCR Aloha RAL Site Admin Configuration** screen.

> 📖 **Reference:** Refer to the NCR Aloha RAL v19.x User Guide for manifests or NCR Aloha RAL 20.x User Guide for Chocolately packages for more information.

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Creating a charitable giving open item

You must create an open item for use in RIUA. We suggest naming it 'Charitable Giving.' Later in the configuration you associate this item ID with lines on the Custom tab in the Store function in Aloha Manager or Aloha Configuration Center). See <u>"Adding custom variables for Round It Up America" on page 10</u>.

To create a 'Charitable Giving' open item:

1. Select **Maintenance > Menu > Items**.

2. Select the **New** drop-down arrow and select **Standard**.

Figure 2 Charitable Giving Item

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. Type a **Chit name.** We recommend 'Charity.'

5. Type a **Long name**. We recommend 'Charitable Giving.'

6. Select **Ask for description**.

7. Do not select a **tax group**.

   -OR-

Select a **tax group** with a zero percent tax.

💡 **Tip:** Round It Up America does not function correctly if you configure the 'Charitable Giving' item as taxable.

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8. Select a **sales** or **retail** category.

9. Select the **Pricing** tab.

Figure 3 Charitable Giving Item Pricing

10. Select **Ask for Price** from the 'Pricing method' drop-down list.

ℹ️ **Tip:** If 'Ask for Price' does not appear as a choice in the 'Pricing method' drop-down list, you must select **Maintenance** > **Business** > **Additional Features** > and clear 'Restrict price edit' under the 'Restriction settings' group bar, to enable the method.
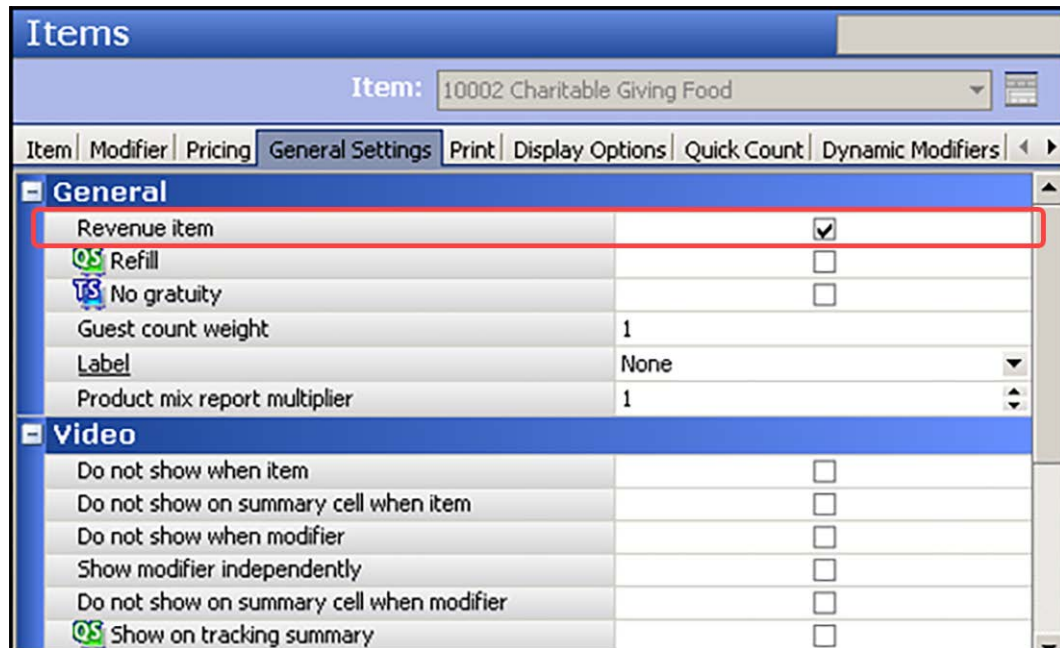
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11. Select the **General Settings** tab.

Figure 4 Charitable Giving Revenue Item

12. Select **Revenue item**.
13. Click **Save** and exit the **Items** function.

Adding custom variables for Round It Up America

In Aloha Manager or Aloha Configuration Center (CFC), access the Store function and add the following custom variables. The system alphabetizes the list by 'Setting name' once saved.

Round It Up America uses the custom variables to:

- Replace the 'Charity $' default text on the credit card voucher with text of your choosing.
- Define the charity item to add to the guest check.
- Define the name to use for the charity item on the guest check.
- Define the maximum amount of contribution allowed.
- Define the maximum percentage of contribution allowed.
- (Optional) Designate how you want to process authorizations for Round It Up transactions. You have two choices. 1) Create two authorizations, one for the original amount plus the tip, the other for the original amount plus the tip plus the change given to charity. The processor settles the second authorization only and drops the first authorization, at their discretion. This is the default

behavior. 2) Create two authorizations, one for the original amount plus the tip, the other for the change given to charity. The processor settles both authorizations.

- (Optional) Move the tip line above the charitable giving line on the printed credit card voucher.

- Allow the consumer to add the donation to the check prior to applying the payment. This is beneficial for a Quick Service environment where the cashier can select the Round It Up America button and apply the rounding before the consumer inserts their credit card. This also allows you to collect donations with a cash payment, and you are not limited to paying with a credit card.

To add the Round It Up America custom variables to the Custom tab:

1. Select **Maintenance > Business > Store.**
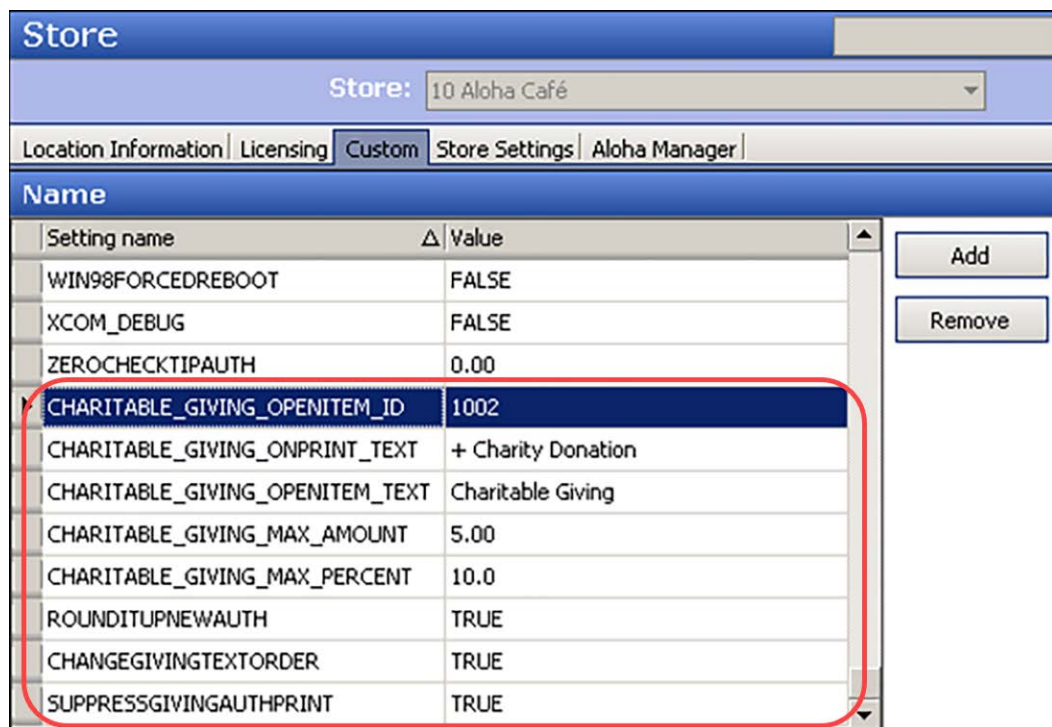2. Select the **Custom** tab.

Figure 5 RIUA Custom Settings

3. Click **Add** and type **CHARITABLE_GIVING_OPENITEM_ID** in the 'Setting name' column, followed by the **number assigned to the Charitable Giving item** you created earlier in the 'Value' column. See "Creating a charitable giving open item" on page 8.

4. If you want to replace the 'Charity $' default text that prints on the credit card voucher with text of your choosing, click **Add** and type **CHARITABLE_GIVING_ONPRINT_TEXT** in the 'Setting name' column, followed by **+ Charity Donation:** or **custom text of your choosing** in the 'Value' column. Type no more than 15 characters or the text will not align properly on the printout.

5. Click **Add** and type **CHARITABLE_GIVING_OPENITEM_TEXT** in the 'Setting name' column, followed by **Charitable Giving** or **custom text of your choosing** to appear on the Point-of-Sale (POS) terminal.

6. Click **Add** and type **CHARITABLE_GIVING_MAX_AMOUNT** in the 'Setting name' column, followed by the maximum amount you allow consumers to contribute. For example, if you configure '5.00' for the maximum allowed amount, the consumer may contribute up to $5.00 on the guest check.

7. Click **Add** and type **CHARITABLE_GIVING_MAX_PERCENT** in the 'Setting name' column, followed by the maximum percentage you allow consumers to contribute. For example, if you configure '10%' for the maximum percentage, and the check total is $21.00, the consumer may contribute up to $2.10 on the guest check.

8. If you want to create two authorizations, one for the original amount plus the tip, the other for the change given to charity, and have the processor settle both authorizations, click **Add** and type **ROUNDITUPNEWAUTH** in the 'Setting name' column, followed by **TRUE** in the 'Value' column; otherwise, the system uses the default behavior and it is not necessary to add this variable.

9. If you want to move the tip line above the charitable giving line on the credit card voucher, click **Add** and type **CHANGEGIVINGTEXTORDER** in the 'Setting name' column, followed by **TRUE** in the 'Value' column; otherwise, the system uses the default behavior and it is not necessary to add this variable.

10. If you want to allow the consumer to add a donation to the check prior to applying a payment, click **Add** and type **APPLYGIVINGBEFOREPAYMENT** in the 'Setting name' column, followed by **TRUE** in the 'Value' column; otherwise, the system adds the donation after you apply the payment. This is convenient for a Quick Service environment.

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

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Adding a button to launch Round It Up America

You must add a button that launches Round It Up America to the tender panel. When you touch this button, the system automatically rounds the amount to the next dollar. The configuration is different depending on if you are using Aloha Table Service or Aloha Quick Service.

To add an RIUA button to the Table Service close screen:

You must use TSButton.cfg to add a button to the Close screen in Table Service. If TSButton.cfg does not appear in the Data directory, you must create the file.

> 📖 **Reference:** Refer to HKS1581 for more information on TSButton.cfg.

1. Open **Windows Explorer** and locate the **Data** directory.
2. Right-click **TSButton.cfg** and select **Open**. The file opens in Windows® Notepad®.

> 💡 **Tip:** If a 'Windows can't open this file' message appears, use the **Select a program for a list of installed programs** and click **OK**. Select **Notepad** and click **OK**.

3. Add the following **line** to TSButton.cfg:

   2,0,19,Round It Up,c:\Bootdrv\Aloha\BIN\Giving.exe,1

4. Save and close **Notepad**.

> 💡 **Tip:** In the example above, 2 specifies the button is a Tender button on the Close Check screen, 0 is static and is always 0, and '19' denotes the position where the button appears on the tender screen. Adjust as necessary, based on your existing tender screen layout.
>
> Substitute c:\bootdrv\Aloha\BIN\Giving.exe,1 with the actual path to the folder to which you copied Giving.exe. (Use must append ',1' to the end of this path so that the system passes the required parameters to Giving.exe.)
>
> You may also change the text that appears on the button by changing 'Round It Up' to text that matches your operation and training.

To add an RIUA button to the Quick Service tender screen:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.
2. Select **Work with Panels**.
3. Select **Panel > Open Panel**. The Open Panels dialog box appears.
4. Select a **panel** to edit, such as the panel from which you access your tenders, and click **OK**. The panel appears.
5. Select **Panel > New Button**. A new button appears on the panel.

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6. Under the Function section of the Properties dialog box, select **Run Application** from the 'Action' drop-down list.

7. Type the **path to Giving.exe** in 'Application.' For example, c:\AlohaQS\BIN\Giving.exe.

8. Select **True** from the 'Pass Parameters' drop-down list.

9. Select **False** from the 'Continue Script Immediately' drop-down list.

10. Under the 'Appearance' group bar, type **Round It Up** instead of Run Application in 'Text.'

11. Configure the **remaining options** on the Properties dialog box as you would for any other button, such as text, font, and color.

12. Select **File > Save** and exit **Screen Designer**.

Defining guest check and voucher messages

You can optionally print a custom message on the bottom of the guest check, to offer an opportunity to donate and define reasons for donations with Round It Up America. Once you create a custom guest check message, you must use the Activation Schedule and Event Schedule functions to establish when the guest check footer message prints.

You may also want to print another guest check message on the debit or credit card voucher to provide instructions to the consumer on how to contribute. You define which guest check message to print on credit card vouchers in 'Print footer message on voucher' under the 'Voucher print settings' group bar in Maintenance > Business > Store > Store Settings > Credit Card group.

> ● **Tip:** If you use Connected Payments, printing a guest check message in the footer of the debit or credit card voucher may not be beneficial, as the consumer has already completed the transaction at the time they receive the voucher.

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To define a custom guest check message for offering an opportunity to donate:

1. Select **Maintenance > Messaging > Guest Check Message**.

2. Click **New** and 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**.

Figure 6 Guest Check Message for Round It Up America Offering

3. Type a **name** for the guest check footer message. For example, 'RIUA Offering.'

4. Under the 'Footer text' group bar, type the **text** to appear at the bottom of the guest check in 'Line 1' through 'Line 12.' See Figure 11on page 1-22.

✏️ **Example:** 'We are saddened by the recent tragic event in our community. Please consider paying with a debit or credit card and making a charitable donation to Round It Up America.'

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5. Click **Save**.

To define a custom guest check message for providing instruction:

1. Click **New** and 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**.

Figure 7 Guest Check Message for Round it Up America Donation

2. Type a **name** for the guest check footer message. For example, 'RIUA Instructions.'

3. Under the 'Footer text' group bar, type the **text** to appear at the bottom of the guest check in 'Line 1' through 'Line 12.' As outlined in the Mission Partner agreement, and required by the State Attorney General. the www.rounditupamerica.org address appears on all printed receipts, See "Signed Voucher Including Charitable Donation" on page 22.

> ✎ **Example:** 'When paying with a debit or credit card, use the line above to round up your total to the nearest dollar and help our community. www.rounditupamerica.org.'

4. Click **Save** and exit the **Guest Check Message** function.

To activate the guest check message for offering an opportunity to donate:

Analyze your **existing activation schedules** to determine if a schedule with the desired recurrence interval for printing the custom guest check message already exists. If yes, use that **activation schedule** to activate the custom guest check message; if not, create a new activation schedule with the desired interval.

> 📖 **Note:** Refer to Activation Schedules in the Aloha Quick Service or Table Service Reference Guides for more information.

To configure the example cited in the scenario, you need a daily activation schedule that is in effect all day, so that the custom guest check message prints on every guest check. The POS system provides a default 'Daily' activation schedule configured for start-of-day, which meets the frequency needs of this requirement; there is no need to create a new activation schedule.

Add a 'Set Guest Check Footer Message' event type to an event schedule to establish the specific custom guest check message to print, the activation schedule to use, and the dates on which you want the message to start and end printing. Because the custom guest check message does not need to stop printing before the End-of-Day runs, you do not need to add an event to disable the custom guest check message; however, you can do this, if desired.

> ℹ️ **Note:** How you are using the Event Schedule function determines whether you add new events to an existing event schedule or add them 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.

1. Select **Maintenance > System Settings > Event Schedule**.
2. Select the **event schedule** to edit from the drop-down list.
3. Select the **Events** tab.
4. Click the **Add** drop-down arrow, select **Set Guest Check Footer Message** as the event type, and click **OK**.
5. Select **Daily** from the 'Activation Schedule' drop-down list. Because the Daily activation schedule stipulates to begin at 'start of day,' you cannot edit the 'Start time' in the event definition. This information is read only.
6. Select the **date for the event message to begin printing** in 'Start date.'
7. Select the **date you no longer want the message to print** in 'End date.'
8. Select the **custom message created for Round It Up America** from the drop-down list.
9. Click **Save** and exit the **Event Schedule** function.

To print the instructional RIUA message on your credit card vouchers:

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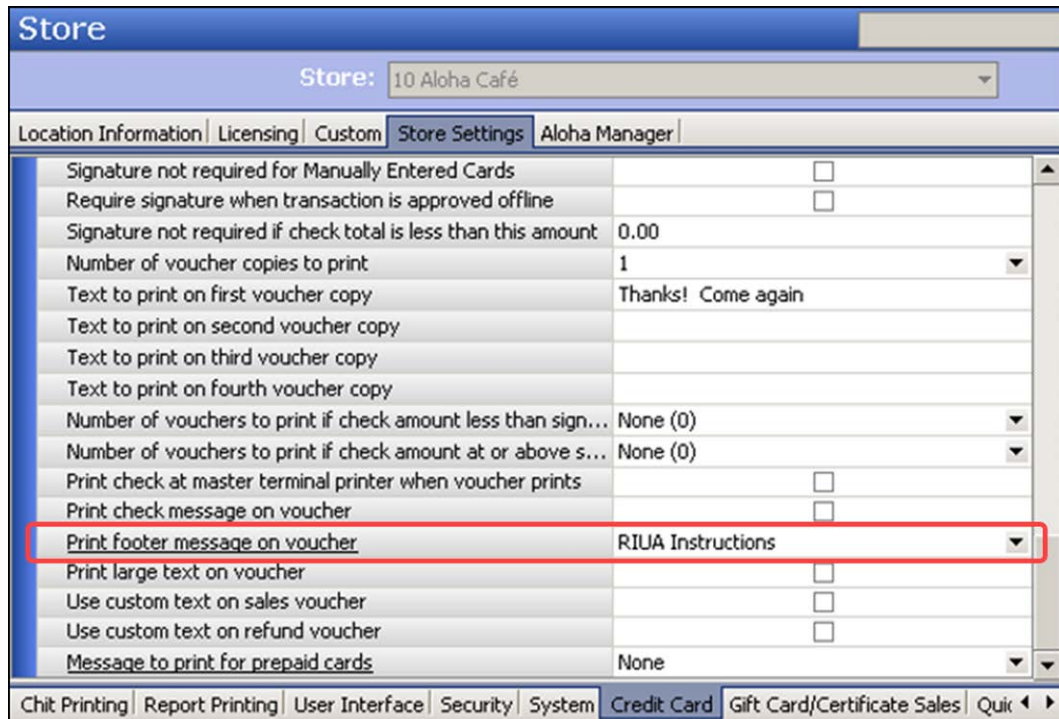

Figure 8 Credit Card Group - Voucher Print Settings

4. Under the 'Voucher print settings' group bar, select the **footer message** you created earlier from the 'Print footer message on voucher' drop-down list.
5. Click **Save** and exit the **Store** function.

Refreshing the data

After all settings are in place in Aloha Manager, it is necessary to select Utilities > POS > Refresh POS & All Installed Products to transfer the new information to the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. If you run the refresh prior to the EOD process, select 'Automatically restart all POS terminals' and click OK to continue. After the data refresh is complete, all new settings become operational across the Aloha network.

> ⚠ **Caution: Refresh data with caution and never during peak hours of operation. All FOH terminals reboot during a refresh and are down for a short period of time.**

Using Round It Up America

You can apply the donation before or after applying payment. Rounding up before payment is convenient for a Quick Service environment; however; you should leverage the best method based on your operation.

To apply a Round It Up America donation before payment:

1. If payment is not applied and you have the APPLYGIVEINGBEFOREPAYMENT custom setting configured, as shown on page 11, navigate to either the **Close** screen for Table Service or, if Quick Service, locate the panel where the Round It Up button is placed.

2. Touch the **Round It Up** button. The Charitable Giving screen appears. The amount defaults to the nearest dollar; however, you can change this amount to whatever the consumer indicates on the voucher.
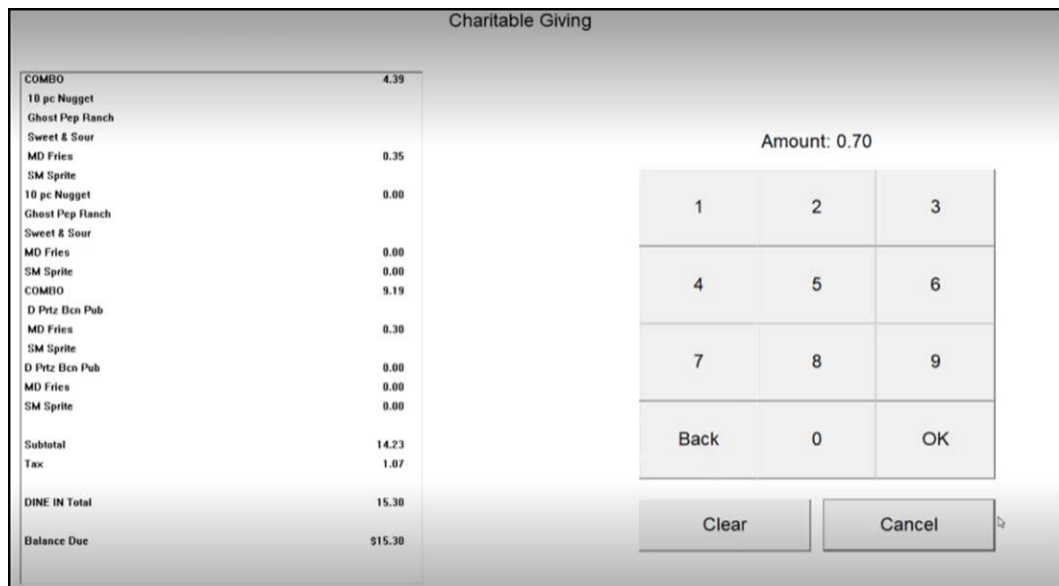

Figure 9 Charitable Giving Screen

3. Verify the **amount** is correct or enter a **new amount**, if needed, and touch **OK**. The charitable amount is added to the check.

4. Apply the **payment** and **tip**, as normal.

To apply a Round It Up donation after payment:

1. If the credit card payment is already applied and the APPLYGIVEINGBEFOREPAYMENT custom setting is not configured, as shown on page 11, navigate to either the **Close** screen for Table Service or, if Quick Service, locate the panel where the Round It Up button is placed.

2. Touch the **Round It Up** button. The Charitable Giving screen appears. The amount defaults to the nearest dollar; however, you can change this amount to whatever the consumer indicates on the voucher.

Figure 10 Charitable Giving Screen

3. Verify the **amount** is correct or enter a **new amount**, if needed, and touch **OK**.
4. If the consumer provides a tip, navigate and touch the **Adjust Tip** button, enter the **tip amount**, and touch **OK**.
5. Close the **check** as normal and hand the receipt to the consumer.

Environments where you print a credit card voucher, print and deliver the most updated guest check to the guest and notify and encourage the consumer to make a **charitable donation**; the consumer can make a donation of any amount or you can round up to the nearest dollar amount.

Figure 11 Guest Check Footer Message Offering Opportunity to Donate

Figure 12 Signed Voucher Including Charitable Donation

Reporting Round It Up America

The system calculates the Round It Up America donation on both the server checkout report and the daily Sales report.

Figure 13 Checkout Report

The daily Sales Report allows you to view the total Round It Up America donations for the day. Use this amount to determine what you need to send.

Figure 14 Daily Sales Report

Troubleshooting Round It Up America

The following are troubleshooting tips provided for TSButton.cfg.

If you experience an issue with TSButton.cfg, check the following:

- When you select a button created with TSButton.cfg, the command line issued by the button is recorded in the Debugging-Output-File (debout) of the terminal. Use this information to verify your command line is functioning properly.

- Test your command line using either a Windows command prompt or by selecting Start/Run, typing the command line, and clicking OK. If the command line works using this method, it should work with TSButton.cfg. If not, it will not work with TSButton.cfg.

- Verify you did not enable the extended command line variables via the CONTEXT field. These variables can interfere with some applications, such as Notepad.

- Do not include a copy of TSButton.cfg in your Newdata folder, since it can overwrite the active copy in the Data folder when you refresh the system.

Round It Up America, 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