NCR V:YIX

Aloha POS System Saving Different Cards to the Same Tab (TS only)

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About saving different cards to the same tab

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

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

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

Configuring the ability to save different cards to the same tab

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

To configure pivot seating:

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

3. Select the Order Entry tab.

| code: 6 Bartender | | |
|--|-----------------|---|
| code Order Entry Financial | | |
| Order entry | | 3 |
| Order entry | | |
| Interface | | |
| Bartender | | |
| Cashier | | |
| Order taker | | |
| Check type | Tables and Tabs | |
| Require tab name | | |
| Pivot seating | | |
| Can get checks from other employees | | |
| Automatically return checks to original owner | | |
| Go directly to get check, followed by close screen | | |
| Automatically exit on close check | | |
| Allow item lookup | | |
| Allow add item | | |
| Prompt for order mode | | |
| Can start PMS check | | |

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

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

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

| tore: 106 Aloha Cafe | | | ` |
|--|-------------------------------------|---|---|
| ocation Information Licensing Custom Store Settings Aloha Manager | | | |
| Guest Count | | * | 1 |
| Tabs and tables | | | |
| List most recent tables first | | | 1 |
| Allow duplicate table numbers | | | 1 |
| Table look up method | Table ID | ~ | 1 |
| Display check number | | |] |
| Tab naming method when card is swiped | Card name | ~ |] |
| Name table using a magnetic card | | | ł |
| Table naming method when card is swiped | Add card name to table | | 1 |
| Upon leaving Order Entry screen without Order Mode assigned | Assign items the default Order Mode | ~ |] |
| Limit bartender to one tab at a time | | |] |
| Automatically name saved tabs with bartender initials | | |] |
| Automatically save current tab when New Tab is pressed | | | |
| Automatically start new order for bartender when items are ordered | | |] |
| Display Fast Cash amount owed in huge font | | | |
| Prompt for amount when using Fast Cash | | | 1 |

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



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

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

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

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

| _ | ton: Store\nCard | |
|-----|-------------------------------|------------------------|
| Pro | perties | |
| * | Appearance | |
| | Text | Store\nCard |
| | Text Alignment | Middle center |
| | Font | Panel Button |
| | Text Color | Skin |
| | Background Color | Skin |
| | Highlight | Skin |
| | Image | None |
| | Use new button display option | False |
| | Gradient | None |
| | Shadow | False |
| | Bevel | False |
| | Outline | False |
| | Scale image | False |
| | Style | Rounded rectangle |
| | Tag | None |
| ~ | Function | |
| | Action | Rename Tabs and Tables |
| > | Layout | |

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

Saving different cards to the same tab

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

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

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

| T Delete All | Split Check | Split Seat Done | Send Walk In | Send | Shft ML |
|--|--------------------------------------|--|--|------------------------------------|-------------------------------|
| DINERS36 | 1 | | Add to Check | New O Order Di | pen Fast rawer Cash |
| | | Fast Bar ReOpening Menu N/A Bev | PNT BlueMoon PNT BudLight PNT | PIT BlueMoon PIT BudLight | BTL Bud BudLight BTL |
| For Table Seat 1 PHT DostXX 5:50 PHT Lagunitas 5:50 Table Seat | Bottles & Cans Draft Beer Kids | CoorsLight PNT 1 DosXX PNT 1 Lagunitas | PIT Coors Ligh PIT DosXX PIT Lagunitas | BTL Corona BTL MichUltra | |
| | Sides | PNT NB Tap In PNT | PIT NB Tap In PIT | BTL MillerLite | |
| | Vodka | AngryOrcha | AngryOrcha | BKT Beer | |
| Table Close Next Seat | 1 Transfer | Store Câid Quant | ity Repeat | Bar Menu Modify D | elete Hol |

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

| | Rename Tab: Ncr< | |
|-------|------------------|---|
| 1 2 3 | 4 5 6 7 8 9 | 0 |
| Q W E | | Р |
| AS | DFGHJKL | |
| / Z X | | 1 |
| Clear | Space Backspace | |
| | OK Cancel | |

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

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



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

| Sel | lect target for saved card |
|------|----------------------------|
| | Table |
| | Seat 1 |
| | Seat 2 |
| | |
| 📀 ок | Cancel |

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

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



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

Tendering and closing separate seats

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

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



3. Touch Add.

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

| | Split Ch | ecks | Split Items |
|---|---------------------|---------------------|----------------|
| Ncr/Check 1 - NCR 3 | Ncr/Check 2 - NCR 3 | Ncr/Check 3 - NCR 3 | |
| For Table/Check 1 PNT Lagunitas 5 50 PNT DoSXX 5 50 PNT AngyOrcha 5 50 Sweet lea 3 00 Seat 1/Check 1 Fanta Orange 3 00 BTL Heineken 5 50 Seat 3/Check 1 MASTERC/ PT DoSXX 19 00 DRT Big In 19 00 Diness #XXXXXXXX 39.76 Auth 028780 | CAN GUINNESS 0.00 | | |
| Combine Add | 📀 OK 🙆 Cancel | Split Seats | |

5. Touch Add.



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

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



9. Touch Saved Card. A confirmation screen appears.

| 3 | Do you wish to close this check to Diners for the amount of 28 22? |
|---|---|
| | Yes 😮 No |

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

Troubleshooting

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

| Swipe card to assign to a seat | |
|--------------------------------|--|
| Invalid card: Card expired | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| Cancel | |

Touch **Cancel** to dismiss.

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