Getting Started with Aloha Stored Value

Welcome to Aloha Stored Value! The system that offers you a user-friendly, intuitive, management tool that helps you control your business needs with minimal effort. You now have access to a feature-rich, enterprise-wide solution. This *Getting Started* guide provides you with useful information to help you get up and running with Aloha Stored Value and on your way to more effectively managing your stores.

Aloha Stored Value offers a choice of two platforms: the flagship Aloha Stored Value product, which runs on the Aloha POS and Aloha Stored Value Terminal Edition (TE), which runs on any VeriFone Omni card swipe terminal. With Aloha Stored Value Terminal Edition, Aloha Stored Value can provide your organization with a very secure and reliable gift card system - regardless of the type of POS platform your operation uses!

An Overview of Aloha Stored Value

Aloha Stored Value is a web-based electronic gift card application, focused on providing Aloha users all of the benefit of internet-based applications, with an extremely seamless integration to the Aloha POS.

The Aloha Stored Value feature set uses existing hardware, offers real-time reporting, seamless integration to Aloha POS, built-in data warehousing and backup, and built in redundancy options in the event of hardware or connection failure at the store site. Simply stated, no other gift card application can match the flexibility of Aloha Stored Value, or come anywhere close to the seamless integration you'll see between the Aloha POS and our new Stored Value

Accessing your Aloha Stored Value Web Site

Before accessing your Stored Value web site, you will need to first obtain a log in, which is comprised of a user name and password. Each log in is unique within Stored Value, in that all users are assigned to a "security class". Security classes identify what users can and cannot see as well as what they can and cannot do within the system. For example, you might set up a security class called "Managers" for your store managers. Within the "Managers" security class are rules that only allow them to access data for their particular store.

How to Obtain a Log In for your Stored Value Web Site

You can obtain a log in to your Stored Value web site by contacting the Aloha Stored Value System Administrator within your company.

Using the Aloha Stored Value Applications

Using the Stored Value Applications

After you have successfully logged in to your company's Aloha Stored Value website, you should take the time to familiarize yourself with all the wonderful applications Aloha Stored Value has to offer you.

The first thing you should do is browse the pre-recorded training classes and register for the Aloha Stored Value online training sessions, which provide you with instructor-led training for the applications provided with the system. If you are unsure of the other classes you should register for, please see the *Applications Overview* section on page 4 for a brief description of each application within Aloha Stored Value.

How to Register for Aloha Insight Online Training Classes

1. From your Aloha Insight Portal page, click the **Training** drop down window then select **Sign up for live classes** as illustrated in Figure 1.

Figure 1 – Online Registration

Click to register for
online training

2. Upon selecting the class drop down window, you'll be provided with a listing of classes that are available for you to register. Simply choose the class you wish to enroll in, then select **Add Class**.
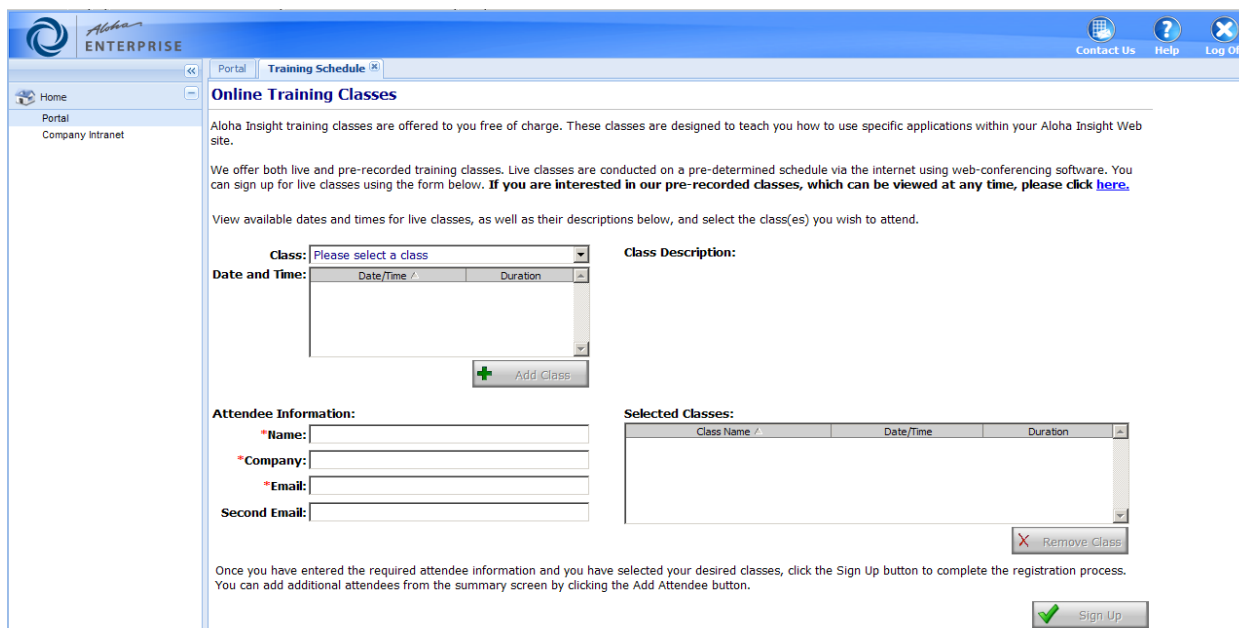

Figure 2 –Training Sign Up Form

3. Please be sure to enter your information in *all* of the text boxes and click **Sign Up**.

4. After registering for a class, you will receive an e-mail that details the instructions for accessing the class.

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Accessing Online Help within Aloha Stored Value

In addition to offering you instructor-led training for Aloha Stored Value, the system also provides Online Help for each of its applications. We urge you to take some time to go through the Online Help in an effort to familiarize yourself with the applications you will be using.

There are two ways to obtain help from within Stored Value. One way is from your Stored Value home page, and the other way is from within the application itself.

To Access Online Help from the Stored Value Home Page

1. Click the Help icon on the top right-hand portion of the page, as illustrated in Figure 3.

Figure 3 – Home Page Online Help Selection

Click to access
Online Help

2. Upon clicking the Help icon, you are presented with a listing of links that invoke help information for each of Stored Value's applications. Simply select the desired link to learn about the module.

To Access Online Help from within an Stored Value Application

1. Each screen within the Stored Value applications provide you with special "hints" that briefly describe how and why to use some of the key components on that screen.

2. When you see a question mark icon (Figure 4), simply click it to access Online Help pertaining to that specific screen.
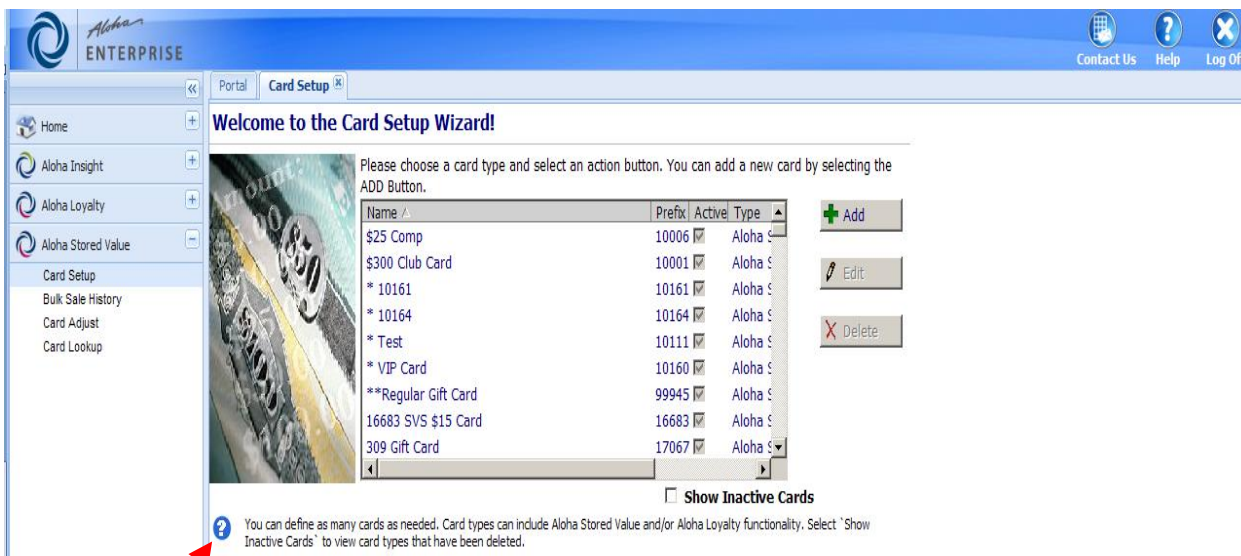

Figure 4 – Screen-based Online Help

Click to access
Online Help

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Using Aloha Stored Value Online Help

Each of Stored Value's Online Help pages is designed to provide you with information about all of the screen elements for each screen as illustrated in figure 5. The left side of the Help page provides you with topic links that cover each screen for that particular application. Simply select the desired topic link to learn about that particular screen.

In addition to information pertaining to all screens, each application's Help page provides you with a Getting Started section to help you gain a basic understanding concerning the intent of that application. You will also find a listing of frequently asked questions as well as a glossary of terms.
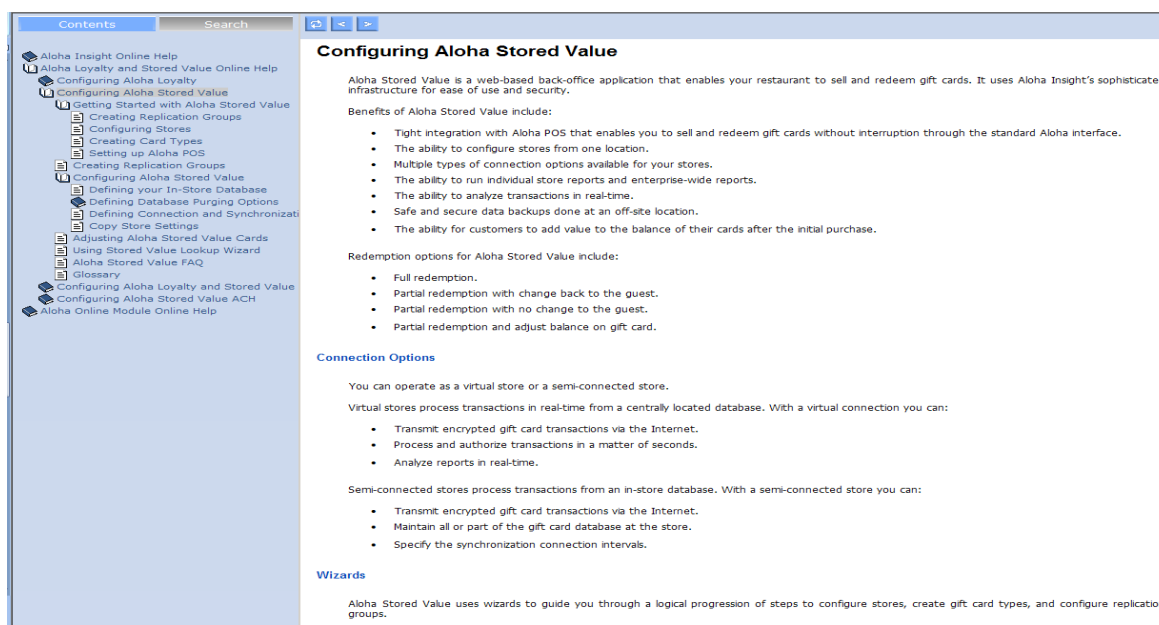

Figure 5 – Online Help

Aloha Stored Value Applications Overview

The following introduces you to each of the applications that are available within Stored Value. If you are unable to see any of the following applications on your Stored Value home page, it signifies that the security class to which you are currently assigned does not grant access to that application.

Aloha Insight

- **Alerts Setup** – Allows you to set up Alerts that provide proactive information to management when specific criteria are met in the system, such Stored Value card sales, redemptions, voids and counts.

- **Alerts Viewer** – Alerts Viewer is a repository for Alerts that have been generated by the Aloha Stored Value system. Only alerts that are designated for delivery to the Alerts Viewer will appear in the Alerts Viewer.

- **Custom Line Items** – Allows you to create a custom line item (data element) based on existing system/custom line items and numbers in the form of mathematical equations. The custom line items can be used in Stored Value custom reports and alerts.

- **Reports Builder** – Allows you to create custom reports by specifying the format, headings, and extracting data from line items you have selected to be included in the report.

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- **Reports Viewer –** Allows you to configure reports using parameters such as the store or stores to be included, report date range(s), report format, etc. In addition you can manually generate the report or schedule a report to automatically generate at a specified interval and be e-mailed to one or more users within your company's Stored Value system.

Aloha Stored Value

- **Card Setup-** Enables you to configure the card type, and determine the functionality of a specific card.

- **Bulk Sale History-** Bulk Sale History enables you to view card sale transactions that have been initiated by your company.

- **Card Adjust** – Allows you to adjust the current balance of a specific gift card.

- **Card Lookup-** Enables you to track and print the history of a single gift card.

    Card Order Form – Allows you to order cards for the Aloha Stored Value Gift Card application

System Setup *Note:* This group of applications is typically used by the resource(s) responsible for the administration of Stored Value for your company.

- **Company Setup** – Company Setup allows you to define company-wide information and how it relates to Stored Value. For example, you can define Stored Value card configuration information such as auto approval, replication groups and connection settings.

- **Site Setup** – Site Setup allows you to add stores to the Stored Value system as well as define store-specific information.

- **User Account Setup** – User Setup allows you to add users to your Stored Value system as well as define and assign security classes for each user.

What are Line Items?

As you learn Stored Value, you'll often read and hear the term "line items". Line items are an integral component within the Reports Builder, Custom Line Items, and Alerts Setup applications. They allow you to tap in to specific data elements within your data warehouse so that you can filter specific information. For example, if you wanted to know how "add value" sales dollars you have for your VIP gift card, you would use the "Aloha Stored Value Add Value Sales Dollars by Card" line item.

What Else is Available?

For more information on any of the following services, please contact your Sales Representative.

- **Aloha Insight** – Is a web-based tool used to effectively manage multiple stores from a central location. Through custom reports, business alerts and multi-store consolidated reports, Aloha Insight delivers the relevant, timely information you need to react quickly to any change in your restaurant's performance or operations.

- **Aloha Loyalty –** Aloha Loyalty is a Web-based loyalty application that allows your organization to quickly design, roll out and manage effective restaurant loyalty programs that will not only attract new customers, but also turn your existing customer base into "ideal customers" who have the purchasing habits that will drive topline growth for your restaurant.

- **Data replication** – Stored Value data can be replicated (via Standard SQL replication) to your company's data warehouse from the Aloha Stored Value data center to a SQL server database of your choice.

- **Aloha HR Bridge** – An application that allows you to send newly hired employee information from either your HR system into your Aloha POS systems or from your Aloha POS systems into your HR system. Aloha HR Bridge also provides you with the ability to make employee changes (such as job code, pay rate changes) in the HR system and have the changes automatically sent to the POS systems.

- **Aloha Restaurant Guard-** Is the tightest loss prevention tool in the industry, providing you with the highest level of transaction intelligence allowing you will gain visibility into potential theft occurring at your restaurants along with the necessary support data to put a stop to it.

- **Aloha Online Ordering -** Aloha Online Ordering provides a secure and reliable solution to enable your customers to place online orders. The Aloha online ordering system integrates seamlessly with your website and your Aloha system**.**

- **Radiant Security Services-** Offers a layered defense solution to help restaurant and retail operators secure their networks, detect security risks and threats, and prevent security compromises with Site Shield, Secure Access and Threat Defender.

- **Aloha Command Center-** Is a dynamic support tool that enables unbeatable levels of service for your site systems. Aloha Command Center monitors the status of each server and terminal in real-time. Proactive alerts allow many issues to be resolved before they impact your operations.

- **Aloha Configuration Center -** Is a centralized database management application that manages Aloha Point-of-Sale configuration settings for multi-store restaurant organizations.

Contacting Aloha Stored Value support

To contact Aloha Stored Value representative regarding a support incident, an enhancement request, or with a general comment, simply click the **Contact Us** icon either on the Aloha Enterprise home page.

Figure 6 – Contact Us

Click contact Aloha Stored Value

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