Software Release Notes

Build 7.1.406 – 1754_0000

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1. Overview

SUMMARY

Volanté Build 1754 of Volanté is now available. This updates many integration functions for the Next Gen Kiosk, as well as numerous new Report Customization features.

MM Hayes Quickcharge Balance Details

For sites using MM Hayes Quickcharge integration, customers can now print off account balance details and account name information on receipts.

New Swagman Report Customization Features

Swagman Report Customization now allows for generation of Customer Payments Reports and Purchase Invoice Reports.

New Gift Card Reports

Gift Card Usage Reports and Gift Card Transaction Detailed Reports have been added to the Reporting Module.

ITC Meal Plans on Next Gen Kiosk

ITC Meal Plans are now supported on Next Gen Kiosk, configured as an iCustomer account.

2.   New Features

MM HAYES – IGIFT CARD RECEIPT CONFIGURATIONS – BALANCE DETAILS

MM Hayes iGift payment integrations now feature additional fields on their receipts. This is configured using in **Terminal Setup > Credit Card > Third Party Field Config**.

Default fields are listed below.

Receipt Field

Volanté Field	MM Hayes Field	Field/API Details
Customer name	account_name	The name of the account holder in the format "last, first mi"
Customer email	account_email	The email address of the account holder.
Balance available	available	The amount that is available for purchase at this location. For approval, it is inclusive of the current transaction.
Prepaid available	prepaid_available	In the event that the account has a prepaid or credit/declining balance, the amount of that balance. This differs with the above available amount for accounts that are allowed to go past zero.
Transaction limit	trans_limit	The limit for an individual transaction.
Amount spent (store)	store_balance	The account balance at this store/venue. For approval, it is inclusive of the current transaction.
Amount spent	global_balance	The account balance overall. For approval, it is inclusive of the current transaction.

GUI Display Field

Volanté Field	MM Hayes Field	Field/API Details
Balance Available	available	The amount that is available for purchase at this location. For approval, it is inclusive of the current transaction.
Prepaid available	prepaid_available	In the event that the account has a prepaid or credit/declining balance, the amount of that balance. This differs with the above available amount for accounts that are allowed to go past zero.
Amount spent (store)	store_balance	The account balance at this store/venue. For approval, it is inclusive of the current transaction.
Amount spent	global_balance	The account balance overall. For approval, it is inclusive of the current transaction.

Some specific fields are detailed below:

A. Value Card (Completed)

This line indicates that payment was made using a Gift Card (labeled as a Value Card). This is the amount deducted from card account to pay for the transaction.

This value is always noted on the receipt when MM Hayes integration is enabled.

B. Value Card Balance

Remaining funds on Gift Card after payment.

This value is always noted on the receipt when MM Hayes integration is enabled.

C. First Name and Last Name

Displays the customer's first name and last name, respectively. These names are configured in the Customer Database module > Customizations Tab > Customize Attributes in the BackOffice.

These lines are only shown on the receipt if:

- MM Hayes / iCustomer integration on Kiosks is enabled
- If kiosk receipt printing is enabled
- "Show on Receipt" is checked off for each attribute, under each attribute's respective Customize Attributes page.

INVOICE REPORTS – DOCTOR'S INVOICE WITH ADDRESS INFORMATION

Invoice Reports pulled by clients may now include details on physicians.

Information on each physician is to be provided to Volanté by the site.

SWAGMAN REPORT CUSTOMIZATION

The following reports are now available under Swagman reports, under the **Export > Swagman** tree:

Customer Payments Report

This report displays sale types for each transaction (Dine In/Take out/Delivery)

Purchase Invoice Reports

This report will display the columns of items purchased along with the category name.   Particularly notable columns added are **category name**, **group name** and **division name**.

Context

This issue stems from requiring identification of item categories. Stakeholders previously required item sales to be segmented based on item hierarchy and/or category.

- Previously, reports did not allow any customization to cater to this requirement.
- Reports came about as a result of wanting identify item categories more distinctly – i.e. segregating item sales with different GL codes, based on the item hierarchy or category.
- A "saleTypeName" column has been added to Swagman Customer Payment Reports and Purchase Invoice Reports. This will indicate sale type name (i.e. Dine-In, Take Out)

GIFT CARD REPORTS IN REPORTS MODULE

Added Gift Card Usage Reports and Gift Card Transactions Detailed Reports to the Reporting Module.

Account Balance, Loads, and Usage Reports for Giftcards are all available for this report.

ITC MEAL PLANS ON NEXT GEN KIOSKS

ITC Meal Plans are now supported on Next Gen Kiosk, configured as an iCustomer account.

- Compared to the POS counterpart of this integration, ITCnetZcom accounts on kiosks may be unable to support all features compared to the POS.

- This primarily includes multiple accounts, due to the way Kiosk account selection is structured.

Related Documentation
ITC - iCustomer on Kiosk

ENTERPRISE REPORTS FOR V2, IN CUSTOMERDB

New reports and reporting features are available:

- Migrated missing reports from CDB to reports V2 – this includes the previously listed reports

- Added Gift Card reports (where customerType = 2). Displays CDB balance / load / usage metrics.

- Restructured customer DB reports section under the reporting module. Includes gift cards alongside customer reports.

INSTAMED P2PE

Instamed P2PE payment processor integration is now available.

InstaMed offers delivery of a PCI-validated P2PE v2.0 solution. In the context of Volanté, it is a Payment Processor integration that can be set up in the BackOffice via Hardware Configuration details.

Client transaction data (including credit card numbers) is maintained on InstaMed's end.

3.   Improvements

NEXT GEN KIOSK – SCROLL BARS

Removed unnecessary scroll bars from certain portions of the GUI.

KIOSK – PAY HERE OR PAY AT COUNTER

Pay Here/Pay at Counter options have been separated into their own screen.

Previously, these options were included alongside Payment Processing options.

This screen is enabled or disabled using the "Enable Pay at Counter" checkbox in Kiosk Configuration.

KIOSK - ENABLE/DISABLE COUPON

It is now possible to enable or disable coupon usage on kiosks.

This is accomplished via the "Enable options" checkbox in the Kiosk Configuration screen.

KIOSK – TRANSITION HISTORY

Transition Histories are now logged. The following items are maintained:

- Item Editing records
- Customer Login times

4. Bug Fixes

REPORTS – MENU ITEM FILTER WITH NEW MENU

Fixed issues with Menu Item Filter groupings continuing to use potentially non-unique IDs, leading to old IDs still being in use after migration.

Sales Reports grouped by MI Filters now display totals as expected.

UPDATED ENTERPRISE REPORTS V2 FOR CDB

Fixed issues in Customer Database Enterprise Reports where data was not being pulled correctly.

Particular reports addressed included the following:

- Account Payment By Customer-Type (Reports V2)
- Consolidated Account Payments by Customer Type
- Customer Account Statement
- Account Invoice with Transaction Details
- Purchase Statement With Transaction Details
- On Account Invoice

Some of the changes included (as listed in Enterprise Reports features above):

- Fixed queries on the reporting module for enterprise customers and customer types.
- Migrated missing reports from CDB to reports V2 – this includes the previously listed reports
- Added Gift Card reports (where customerType = 2). Displays CDB balance / load / usage metrics.
- Restructured customer DB reports section under the reporting module. Includes gift cards alongside customer reports.

RESOLVED MM HAYES TIME FORMAT ISSUES

Fixed issues where 24-hour clock times would interpret "AM" and "PM" times as "AM" only. Time periods now use the correct time with MM Hayes integrations.

ORIGINAL PRICE UNDER 'PRICE LEVEL' TAB IS NOT UPDATED WHEN CHOOSING A FUTURE STARTED DATE

Fixed issues where setting a menu item's price to change at a future date via Price Level scheduling would fail to update to the new price.

CLOSE DAY DETAILS INCORRECTLY LABELED PAYMENT METHOD DISCOUNTS (1715/1750 +)

Fixed issues where, in the Close Day Report, **Total Payment Method Discounts** would be incorrectly labelled as Bill Discounts.

This affected Close Day Details, as well as Payment Method Breakdown sections.

Affected builds **1715** and **1750**.

Sites using build **1715** will still require use of a query as a workaround, as the update was primarily applied to Build 1750 and higher. The query is as follows:

```
update payment_method_types set paymentmethodName = 'Payment Method
Discount' where paymentMethodtypeid = -1
```

VOUCHER SCAN BEHAVIOR NOT CORRECT ON KIOSK/POS

Fixed issues where vouchers were still usable, despite rules or limitations on the voucher not being satisfied, and still applied to the transaction.

For example, a voucher that is only usable for transactions exceeding $10 would still apply even if the transaction was under $10.

INVENTORY NUMBER REDUCED FOR REFUND TRANSACTION

Fixed issues where refunded items would reduce item inventory.

Refunding an item will replenish inventory counts, but will only occur if the count was consumed to begin with.

Refunds now only work with inventory items if there is adequate stock to begin with.

INVENTORY NUMBER UPDATED WRONG WHEN SWITCHING FROM OFFLINE TO ONLINE

Resolved issues where inventory was being incorrectly updated due to latency and communication issues, when switching from offline to online.

ENTERPRISE CUSTOMERS SHOULD NOT BE EDITED ON LOCAL STORES

Updated Enterprise Customers so that they can no longer be edited on local stores.

This previously lead to these customers using local customer types, which would cause editing issues.

SRM DOES NOT WORK WHEN SWITCHING TO FRENCH LANGUAGE IN VOLANTE

Fixed issues with printing Sales Recording Module (SRM) receipts for clients using French language settings; receipts now print comma separators (instead of decimals) when the software language is set to French.

This affects all French sites using V7 of Volanté.

Related Documentation
SRM Module

CREDIT CARD TRANSACTIONS DISABLED IN TRAINEE MODE

Fixed issues where Credit Card transactions were allowed in Trainee Mode, on the POS. Typically, a Trainee user is expected not to be able to perform live transactions (i.e. credit card transactions being committed).

- This issue stems from a Trainee user being set up in the HeadOffice, which treats the user differently from the standard Trainee.

- The following changes address these issues:

- Trainee users are removed and disallowed from being created in HeadOffice.

- Automatic creation of Trainee users no longer occurs, as was previously the case (i.e. "StoreId=0" Trainee users are no longer created, as it is an invalid scenario)

- A script has been added to clean up "global" Trainee users in specific tables where Trainee data is present)

- As a further preventative measure, should a HO Trainee user still exist, and are also capable of performing credit card transactions, they are hard prevented from doing so by the system.

INVENTORY – SIZE BUTTON CHECKS INVENTORY PROPERLY

Fixed issues where selecting an Inventory Count Item with Size Item variants would not deduct from the total Inventory Count.

SCANNING PRINTED BARCODES ON RECEIPTS

Fixed issues where printed barcodes on receipts could not be scanned on POSes.