



volanté

Build 7.1.411 – 1761_0000

Software Release Notes

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Overview

Summary of Build 1761_0000

Volanté build 1761_0000 introduces numerous improvements to the Kiosk User Interface, accompanying recent iCustomer Gift and Loyalty support for kiosks. Additional changes are now available for Account Management (AMS) functionality, including updates to existing reports for with AMS.

Additional highlights for this release

- **Compact, Text-Only Menu Item Tiles on Kiosk** – On Kiosks, Menu Item tiles can be configured to be displayed in smaller sizes to take up less space on the kiosk display. Tiles appearing in this this format are referred to as Compact Tiles.
- **Meal Plan Buttons on Kiosk** – Customer Accounts eligible for Meal Plans are now allowed to select Meal Plans on Kiosks. This follows a workflow similar to On Account payments on Kiosk.
- **Menu Item List by Price Level and Size Reports** – Generates reports based on the profit center filter and/or terminal selected.
- **Automatic Refund of Closed, Expired and Suspended AMS Accounts** – Automatic refunds can be set up for AMS accounts that are defunct. This will refund all remaining amounts back to saved credit cards specified on the account.
- **Re-certification with DataCandy** – Volante is now re-certified with DataCandy Loyalty and Rewards in 1761.
- **Ending Balance Reports for Gift Cards and On Account for AMS Accounts** – These reports can be found under **Reports > Customized > CDL > Reports**.
- **AudienceView Gift Card Integration** – AudienceView gift cards can now be integrated with Volante in 1761.

New Features

Reports

“Menu Item – List by Price Level and Size” Reports

Re-implemented the “**Menu Item List by Price Level / Size**” report.

This report is generated based on the profit center filter and/or terminal selected.

This report consists of the following columns: PLU, Price Level (Name), Menu Item (Name), menuItemId, BasePrice (Global Price), UpdatedPrice

Kiosks

Kiosks – Compact Text Only Tiles and Backgrounds

On Kiosks, Menu Item tiles can be configured to be displayed in smaller sizes to take up less space on the kiosk display. Tiles appearing in this this format are referred to as compact tiles.

Menu Item and Option Item tiles can be displayed in compact form, however Category tiles cannot.

Background images and colors can now also be added from the right-pane for Menu Category and Menu Item selection screens.

Meal Plan Button on Kiosk

Meal Plan buttons are now available on the kiosk for customers who are signed-in with appropriately configured Customer accounts. This button makes use of Bill Price modifiers that can be configured with any specified percentage discount.

This button will appear alongside other Payment Options towards the end of a transaction payment workflow.

Rounding up for Charity on the Kiosk

Ported over POS functionality to round-up transactions and donate the rounded-up difference to Charity on the Kiosk.

If rounding up for charity is enabled, upon payment on the kiosk the user is prompted if they want to "round up for charity".

The amount is then rounded up to the nearest dollar, this should be reflected on the receipt and in the reports.

SAF Transaction Management on Kiosks

Store and Forward (SAF) Management is now available on kiosks, comparable to SAF functions on the POS. This includes new notifications for SAF:

- A notification bubble on the lock screen
- A notification panel on the admin panel

These occur when SAF is triggered, and transactions made offline are present on the system. Resolving and approval of SAF transactions must still be accomplished in POS mode's SAF module.

Kiosk Menu Items – Text Descriptions and Calorie Counts

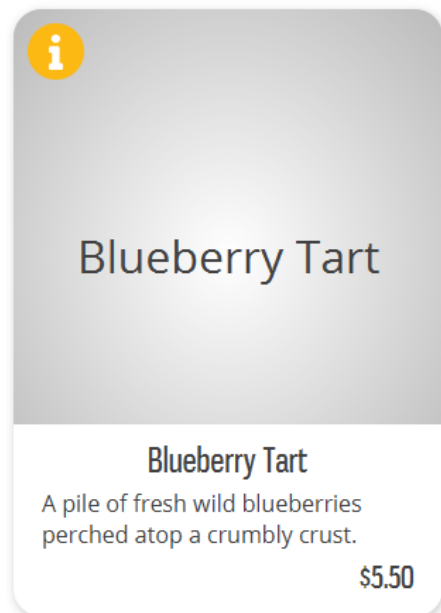
Users can add information on calories and text descriptions for menu items on the Kiosk.

The following new fields are available in Build 1761.

- **Calories**
- **Description**
- **Alt Description**

It is possible to expand the text box for Menu Items to display the description by pressing an "i" icon on the Menu Item tile.

Both types of text are displayed under the Menu Item image, and configured via the BackOffice.



AMS

Automatically Refund Closed or Suspended AMS Accounts

Customers that have been suspended or removed from the system can now receive refunds for any remaining balances on their AMS accounts. These funds must be refunded back to the customer's credit card, which needs to be saved in the system.

To be eligible for Auto-Refund, the customer account must meet the following criteria:

- Account is eligible for AMS usage
- Account is capable of loading funds
- Account must have a status of Closed, Suspended, or Expired
- Account has a balance remaining over \$0 that can be refunded
- Account has a saved credit card to refund to

If any accounts meet this criteria, the AMS will refund the account and zero out the balance. Following the refund, an automated email notification will inform the customer that their account has been refunded the appropriate amount. New notification template and settings for refunds can be configured in the BackOffice, under the **Email Notifications** module.

If Auto-Refund function needs to be set up for the site, please reach out to your Volante Project Manager for more details.

AMS Ending Balance Detailed Report

Two new reports are available for sites using AMS:

- **Account Receivable Ending Balance Detailed Report** – Shows each account's starting balance, total load per account, total usage per profit center per account, and ending balance.
- **Account Receivable Ending Balance Summary Report** – Shows each account's starting balance, total load of all accounts, total usage per profit center, total ending balance of all accounts.

Reports can be sorted by their Profit Centres.

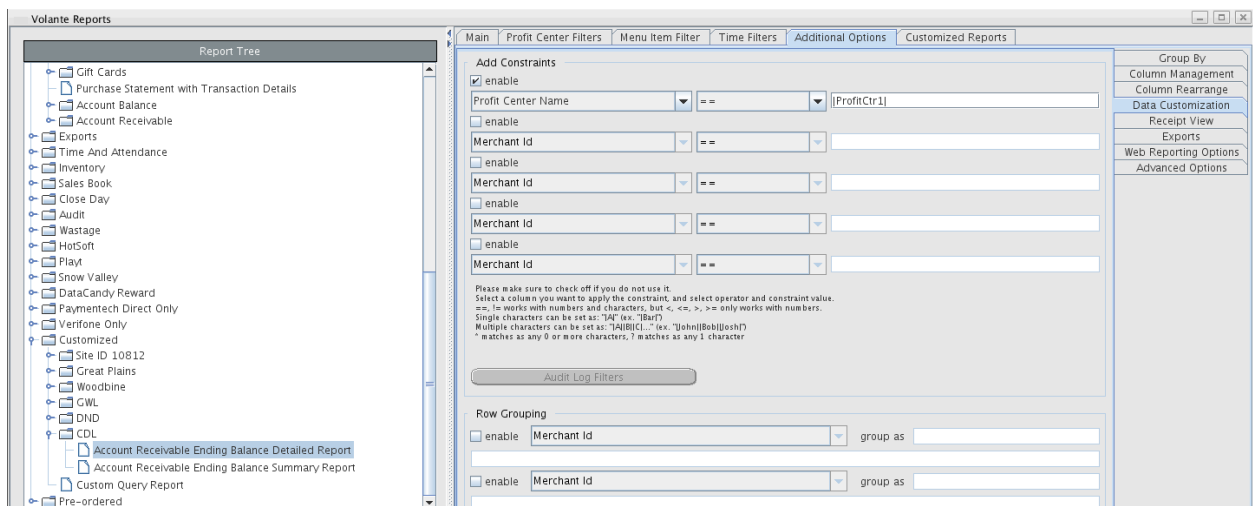
These reports will display metrics based on Profit Centers.

To ensure that the reports are displayed properly, users will need to add constraints.

Under **Additional Options > Data Customization tab > Add Constraints > Add "Profit Center Name" constraint.**

In this field, write the profit center's name using the following format:

```
|<profitcentername>|
```



Gift Card Report for AMS Accounts

Gift Card Usage Reports, previously available for other account types, are now available for AMS Accounts. The following reports can be generated:

- **Gift Card Sales Only Transaction Details Report**
- **Gift Card Transaction Details Report**

Add a Maximum Cap Value for Amounts Loaded on AMS

Users can now specify a maximum cap for amounts loaded through the AMS on the BackOffice.

This is available under **Customer Database > General > Other > Maximum balance limit at AMS.**

Volante will disallow Load or Autoload amounts that exceed this cap, indicating a standard error. Users will need to try again with a value under the cap.

The screenshot shows the 'Customer Database' application window. On the left is a 'Customer Types' list with 'Autoload' selected. The main area displays configuration for the 'Autoload' account type. The 'Identifier' section shows 'CustTypeId: 96000006', 'Name: Autoload', and 'Description: Autoload for AMS'. The 'Account Info' section has 'Enable Customer Account' checked, 'Credit Limit: 0.0', 'Customer Security Type: N/A', and 'Order Id: 0'. The 'Other' section includes 'Interface Link', 'Auto transfer from: NONE', and 'Maximum balance limit at AMS: 1000' (highlighted with a red box). At the bottom, there are checkboxes for 'Allow to reload account at POS' and 'Allow to load account at AMS', both checked. Navigation buttons 'New', 'Edit', 'Delete', 'Add', and 'Cancel' are at the bottom.

Other Integrations

AudienceView Gift Card Integration

Volante now supports integration with AudienceView gift card solutions.

- Gift card functions such as redeeming rewards, viewing balance, and processing voids can be performed from the POS.

Improvements

POS

Improved POS Options Screen Loading Time

Loading the Option Dialog into memory is now done during POS initialization, allowing for improved POS Option screen load times.

Adjusted Volante Logo Placement on POS Main Screen

Made adjustments to Volante Logo files so that it no longer overlaps with terminal information on the POS Main Screen.

Table Service – Improved Performance for Multiple Server Connections

Resolved issues where many terminal-server connections occurring at the same time would result in high resource usage and poor performance when using the Table Service.

Kiosk

Kiosk Checkout Screen – Group Cart Items

Kiosks now display multiples of the same item added to a cart under one row with the quantity field increased.

Kiosk Checkout Screen – Add and Deduct Quantity Icons

Added Add/Deduct (+ and -) Quantity buttons to the kiosk shopping cart (checkout) screen.

Kiosk Customers – Logging in a DataCandy Loyalty Customer resets their CDB Customer Type to Default

Added the ability to reassign a customer type to a type other than the default, and maintain the changed type change. After manual changes are made in the BO, it is also possible to assign a customer type to DataCandy Loyalty customers in general, using a flag under Hardware Configuration.

This flag can be set by entering "CustomerType:<CustTypeValue>" into the Merchant Number field, under Terminal Setup > Credit Card > iGift Card

Kiosk – Admin Options – Timeout Screen

When enough time has elapsed on the kiosk, the Timeout screen will now indicate to the user to tap the screen to proceed.

Kiosk – Admin Options – Exit

Updated the **Cancel** button in the Admin Options screen to now say **Exit**.

Kiosk – Admin Options – Removed Arrow Icons

Removed arrow icons on Admin Options buttons for improved clarity of UI usage.

Kiosk – Charging Multiple Accounts

Kiosks now supports the ability to charge to multiple accounts at once (e.g. On Account charges to Cust Type 1, and a secondary payment account).

Kiosk Configuration – Exit Button Improvements

An improvement has been made to the behaviour of the Exit button. The user will now be prompted to save before exiting if unsaved changes have been detected.

Kiosk – Limited-use Coupons and Voucher Barcodes

Coupons and vouchers can now be configured for limited use, and hence cannot be used indefinitely.

This is configured under **General Setup > Discount Setup** by checking off "Enable limited use" from Basic Settings.

If there are a limited number of uses, enter the value in the "Total bar codes" field, and then indicate the number of times per barcode in the "Max uses per bar code". Coupons and voucher have a barcode that can be configured with a limit on the number of times it can be scanned and will cease to be usable once the limit has been reached.

These types of coupons or vouchers are desirable in situations where it may be difficult to enforce a limit on customer reuse. This is particularly useful in situations where the customer has a coupon or voucher which they do not surrender once it has been used.

Ideal use for this feature is on kiosk units where a cashier is not present to take the coupon upon use.

BackOffice

Log any Error/Exception Missed to Catch

Made code changes to log all errors and exceptions thrown, but not caught.

Meal Plan Setup Change

Added a checkbox labelled '**Allow Mean Plan only during the periods below.**' When this is checked, the meal plan should only be usable during time intervals specified.

Example: A meal plan is enabled from the period of Jan 15 to Mar 27 in the periods fields. All other times it should have an effective maximum of allowed transactions of "0".

Previously it would result in errors when processing payments, particularly when attempting to pay remaining balances using On Account.

I.e. Meal plan account and if insufficient funds then roll over to payroll account.

Menu Setup – Refreshing Indicates Saved Changes

A new feature has been added to Menu Setup where the user will be prompted to save changes, if he/she clicks Refresh with unsaved changes.

Bug Fixes

Kiosk

Kiosk - Data Candy rewards invalidated by periodic price mod removal

Fixed issue where the free portion of DataCandy rewards are removed when price modifiers are removed during the addition of an item on the Kiosk.

French in KIOSK: Kiosk admin panel fields in English

Fixed issue where some fields on the Kiosk Admin Panel are appearing in English while in French mode.

Kiosk Admin Panel 2: Server Connection Status not updated properly

Fixed issue where the server connection status indicator on the Kiosk admin panel does not accurately display the current connection status.

Do not display open price items on the kiosk

Fixed issue where open priced items are appearing on the kiosk. In addition, prices cannot be entered for those items.

Kiosk: Customer scan or Employee scan does not cancel the timeout.

Fixed issue on the kiosk where scanning of the employee, or customer card does not cancel the session timeout countdown.

Kiosk CDB - Points Account Active by Default

Fixed issue where Inactive points accounts appear on the kiosk.

POS

POS, Merging terminal ID keys

Fixed issue where transactions become missing when multiple instances of the POS are running.

POS: Cancelling Clock In /Clock Out also opens Cash drawer

Fixed issue where the cash drawer opens when the user Clock In/Out is cancelled.

BackOffice

Schedules do not show up on the actual Calendar month

Fixed issues where schedules are not accurately reflected in the calendar.

Combo - Schedule - Month View doesn't show repeat interval if it's before 9am

Fixed issue where the repeat interval does not appear in the calendar under Month view when the interval end time is earlier than 9am.

Auto Combo with Discount does not work

Fixed issue where Auto Combo does not take effect if discounts are applied to ordered items.

Pre-paid CreditCard GiftCards - Approved for partial payment by host, but approved entire amount in Volante

Fixed issue where amounts approved for partial-payment using Pre-paid CreditCard GiftCards are mismatched between the POS and payment host.

New menu item taxes not showing up correctly in the category and group and div summary panel

Fixed issue where taxes do not appear in the Category/Group/Division summary panel for new items.

Grouped 86 Items can't be removed

Fixed issue where items marked as 86ed cannot be ordered once the status has been removed.

Zebra prints extra tickets for Void transaction (Ski resorts)

Fixed issue where an extra ticket is printed when a transaction is voided.

Screen config drag and drop

Fixed an issue where an attempt to drag and drop a new button into Screen Config does not work on the first attempt.

Production: "X" button for dialog or window behaves as button "Yes" when click on it

Fixed issue where clicking on the "X" to close a dialogue box does not cancel the operation. Operation continues as if "Yes" has been clicked instead.

Menus

Remove the \$0 from Label items

Fixed issue where "\$0" is displayed for items with a zero-dollar value price.

Menu Migration for stand alone stores not carrying over all taxes

Fixed issue where taxes and/or tax links do not transfer from old menus to new menus during migration.

Menu Options QTY Price Point is incorrect when qp is set

Fixed issue where the correct price point is not applied to options when the item quantity is equal to the Quantity Point.

Integrations

Eigen Pinpad Rounding Inconsistencies

Fixed issue where payment amounts are not being rounded consistently by the Eigen PINpad and Volante.

First Data iGiftCard : iGiftCard Balance on Receipt shows " Offline" instead of actual Balance on the gift card.

Fixed issue where the gift card receipt displays, "offline" instead of the balance of the gift card.

Bluefin SAF not kicking in during USAePay server outage

Fixed issue where Bluefin SAF does not become enabled when USAePay server outage has occurred.

ITC Refund on \$0 items that have priced taxable options does not refund properly

Fixed issue where refunds on split tender transactions using multiple ITC accounts are not being processed accurately.

Reporting

Reporting inconsistency between sales summary and discount reports

Fixed issue where Sales Summary and Discount reports display differing values.

Volante Web Reporting Incorrect Time

Fixed issue where reports generated via Web Reporting reflects the incorrect time.

TaxExempt Reports show all taxes

Fixed issue where TaxExempt report on mobile devices displays all taxes instead of displaying taxes defined only for the store in question.

Mayo Directors report takes 45+ mins for processing

Fixed issue where Directors Report(s) for Mayo Clinic take more than 45 minutes to process.

Date picker issues with reports and day light savings time

Fixed issue where the Date picker miscalculates the end time for reports.

Unable to Generate a Close Day summary report under System Reports->Close Day Summary

Fixed issue where Close Day summary report contains no data.