NCR Aloha Takeout v12.1
Implementation Guide

Use with CFC and new Aloha Manager

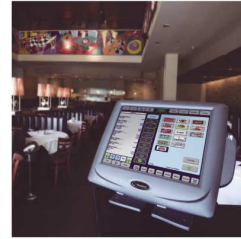**NCR** Experience a new world of interaction

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NCR Aloha Takeout Implementation Guide

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Aloha Takeout v12.1 Implementation Guide

Introduction

About Aloha Takeout

Aloha Takeout at a Glance	
Core product	Aloha Quick Service or Table Service is required, version 6.4.13 or later.
Complementary products	Aloha Table Service requires a license for Aloha Delivery/Frequent Buyer (D/FB), included with primary Aloha Takeout license.
Separate license required?	**Takeout** — Aloha Takeout requires a separate license. **Delivery** — The Delivery component of Aloha Takeout requires a separate license from Aloha Delivery/Frequent Buyer (D/FB), which is included as part of the Aloha Takeout license. It is not necessary to actually install D/FB. **Mapping** — A separate license is also required for the mapping module, if you elect to install it.
Other References	Aloha Quick Service or Table Service Manager Guides or Reference Guides.

Efficiently managing the realities of your takeout and delivery operations quickly improves your speed of service and gives you the opportunity to grow beyond the walls of your business. Using Aloha Takeout, your order entry, order management production, and delivery are synchronized in one tightly integrated solution.

Aloha Takeout provides an innovative solution to streamline take-away and curbside operations. The addition of the Aloha Takeout Delivery license enables the tools needed to manage deliveries. You can also add an Aloha Takeout Delivery Mapping license, to maximize the efficiency of your delivery business by optimizing delivery routes for drivers. With Aloha Takeout extending the feature-rich Aloha Quick Service and Table Service applications, your staff can now focus on smooth restaurant operations and superior guest service.

Installation of Aloha Takeout is separate from the Aloha system. Once installed, configuration is accomplished, from within the configuration management tool (CMT), as if it were an integral part of that product. As a best practice, we recommend accepting the default installation path, within the 'BootDrv share,' which is to say within the same directory as Quick Service or Table Service. For example:

> C:\BootDrv\Aloha Takeout
> C:\POS\Takeout

System Requirements

This section discusses the minimum hardware requirements, as well as any third-party software products, required to successfully install and operate Aloha Takeout. Prior to the implementation of ATO, please read and perform all required steps to ensure a successful installation.

Hardware Requirements

The following table summarizes hardware, operating system, and software prerequisites for Aloha Takeout.

Recommended System Requirements for Aloha Takeout		
Parameter	Aloha BOH File Server	Terminal
Processor Speed	Intel Pentium® IV 1.3 GHz.	Intel Celeron® M 800 MHz (Normal operations) Intel Celeron® M 1.3GHz or faster (Busy operations)
System RAM	1 GB	1 GB
Operating System	Windows XP Pro, Windows 7, Windows 2003 Server, or Windows 2008 Server.	Windows XP Pro or later (XPe or WES supported through image changes).
Other Prerequisites	.NET Framework v3.0 SP1	.NET Framework v3.0 SP1. UDOC terminals must use the latest XPe or WES image, as appropriate.
Hard Drive Space	10 GB, minimum, to support .NET v3.0 SP1 installation.	1 GB, minimum, to support .NET v3.0 SP1 installation (if not already present).
Aloha Versions Supported	Quick Service and Table Service, v6.4.13 or later.	

> The Aloha BOH file server must have 2 GB of temporary storage space available on the hard drive to support the .NET v3.0 SP1 installation. This space requirement does not apply to 1 GB UDOC Radiant terminals; this requirement is met by .NET v3.0 SP1, as part of the base XPe image. Newer WES images for these terminals include .NET v3.0 SP1. A UDOC terminal may require reimaging if the correct .NET version is not installed.

NCR software is often 'NCR-centric,' with regard to hardware, and Aloha Takeout is no exception. When you install Aloha Takeout on a terminal, and the Aloha Takeout client attempts to start on the terminal, the program polls the hardware to determine its type. One of three conditions determines the result of this poll.

- If the hardware is a Radiant terminal, the client starts normally.
- If the terminal is not of Radiant manufacture, the client program searches for a non-Radiant hardware license. If the license is found, the client starts normally.
- If the license is not found, an error message appears to this effect, and the client terminates.

The only exception to this scenario is when a site is running the BOH and the FOH on the same computer. If you are using a Radiant server, it is possible the Aloha Takeout client may not recognize the server as Radiant hardware. If this should happen with your installation, contact the NCR team for help.

Third-Party Software Prerequisites

The prerequisites you need for supporting Aloha Takeout are all available from the downloads section of the Microsoft Web site:

http://www.microsoft.com/downloads

All installations are wizard-based. Double-click each file to launch the installation wizard, and click 'Next' and 'Finish' until the process is complete.

- Install .NET v3.0 SP1 on the Aloha Back-of-House (BOH) file server and each terminal. The Aloha Takeout installation process validates the presence and the version of .Net installed, as it starts.
- Install Microsoft SQL Express 2005 SP2 on the Aloha BOH file server.

    - Select only the 'Database Services' for installation.
    - Select 'Mixed mode authentication.'
    - Select 'Enable User Instances.'
    - Leave the 'Named instance' set at the default, 'SQLEXPRESS.'

> **Notes**   Microsoft SQL Express 2005 SP2 is installed by the CMT. We recommend installing the CMT prior to installing Aloha Takeout.

- Install Microsoft SQL Server Management Studio Express SP2 on the Aloha BOH file server.
- Run Windows Update on the Aloha BOH file server and install critical updates.

Because Aloha Takeout automatically binds to the SQLEXPRESS 'named instance' during installation, it is not absolutely necessary to install SQL Server Management Studio Express. This application provides a user interface you can use to stop or start the Aloha Takeout database, if you find it necessary to do so. For this reason, we recommend installing this product as a 'best practice.'

Using Aloha Takeout with SQL 2008

Aloha Takeout requires Microsoft SQL Express 2005 to operate, and the named instance of that installation must be 'SQLExpress.' If you are already using, or expect to need, SQL 2008 or SQL 2008 Express, this application will not interfere with Aloha Takeout, provided the following are true *before* installing Aloha Takeout.

- Verify no named instance of SQL 2008 is 'SQLExpress.'
- Install SQL Express 2005 or SQL 2005.
- This instance of SQL Express 2005 *must* be named 'SQLExpress.'
- Do not install SQL Management Studio for SQL 2005. SQL Management Studio 2008 provides the capability of viewing SQL 2005 databases, if needed.

Aloha Security Key Requirements

As requirements intensify, and as new versions of Aloha become available, you must upgrade the security key accordingly. This upgrade is especially important if the EDC version is higher than the POS version. Upgrade the security key as follows:

- Upgrade the security key to, at a minimum, the version of EDC you are using.
- Enable 'Takeout' for sites using any part of Aloha Takeout. Aloha Delivery (the legacy Delivery/ Frequent Buyer product) is automatically enabled on all keys, when adding the Takeout license.

- Enable 'Takeout Delivery,' in addition to the 'Takeout' license above, for locations offering a delivery service.
- Enable 'Takeout Delivery Mapping,' in addition to the two license capabilities above, for sites using a mapping program in conjunction with their delivery service.
- Update key version to 6.4 or later, if necessary. If your business needs require support for the full suite of Aloha Takeout features, you must upgrade to Aloha v6.7.10 or later, and update your Aloha security key to Aloha v6.7 or later.
- Enable 'Allow Non-Radiant Hardware' on the key, if any of the Aloha Takeout terminals are not Radiant P1220, P1230, P1510, P1515, P1520, P1530, P1550, P1560, P1760 or P1515.
- Contact your NCR team member (RSM), if running FOH and BOH on a Radiant server, for help with licensing.

What's New in NCR Aloha Takeout v12.1

NCR Aloha Takeout v12.1 incorporates several new features to give you more capabilities, and make your job easier, as it pertains to takeout and delivery operations.

Training Mode

Training mode allows order takers, cashiers, drivers, and dispatchers to practice and improve skills without impacting customer service. Aloha Takeout uses a green border and order background to clearly indicate when the employee is in training mode, similar to Aloha POS. Aloha Takeout installs a separate SQL database to segregate training from live orders. This feature requires the addition of training interface terminals, a training interface job code, and training interface employees, to fully leverage ATO training functionality. The training interface job code must have the 'Training' option enabled to work.

Figure i - 1 Aloha Takeout Training Mode

Auto Expand Time Segments

Time segments on the Dispatch and Future screens auto-expand based on a configured number of minutes. This feature displays relative orders and hides non-immediate orders in collapsed segments. This cleans up the screen and allows you to focus on the orders at hand. See "Dispatch Tab" on page 3-46. Also refer to "Future Tab" on page 3-48.

Future Order Release Time

The system automatically releases future orders booked on prior days to the kitchen at a defined time. This allows the kitchen staff to organize and prepare orders for the day. To enable future orders and select a future order void reason, see See "To enable future orders, and select a future order void reason:" on page 3-33.

Enter Tips with Stored Credit Card Orders

Allows customers to add a tip, using a stored credit card, when paying for a current or future order. When the payment is applied, Aloha Takeout authorizes the card for the amount plus the tip. Along with this feature is the ability to enter an amount for the credit card payment that is less than the balance due on the check. This allows guests to split-pay the order. For example, a guest can pay a portion of the balance with a credit card and the remainder in cash. The only configuration requirement is the tender must have 'Allows tips' enabled.

Declined Credit Card Flow

Aloha Takeout can alert you when the system declines a stored credit card. A prompt appears allowing you to enter a different payment or to store the order until you receive valid payment information. The system will not release the order with the declined credit card to the kitchen until you enter valid payment information. See "Panel Options" on page 3-43.

Prepaid Tender

It is now possible to tender and settle orders placed by delivery service companies, on behalf of a customer. The prepaid button on the confirmation screen allows employees to quickly tender an order. Reconciliation with a delivery service company is done at a later time. See "Panel Options" on page 3-43.

Aloha POS House Account Integration

You can now import Aloha POS house account information into Aloha Takeout at end of day or by restarting the Aloha Takeout service. You can also associate house accounts with one or more customers, for billing. The Aloha Takeout invoice feature also works with this function. Statements, billing, and payments continue to be handled through current POS functionality. See "Enable House Accounts" on page 3-8.

Driver Pre-Checkout

The Driver screen now groups orders either by delivery run or bu=y payment type. This helps drivers confirm orders accountable to them, and to validate any tips are correct. The pre-checkout report now contains summary information, to help organize cash and credit card vouchers, and prepare for checkout.

Force Cash-To-Store

To consolidate and reduce checkout times, the system can now automatically perform a cash drop for the driver, prior to checkout, to reduce the net cash owed to 0.00, transferring cash accountability to a cashier, if they are assigned to the cash drawer on the local terminal. The cashier accepts the remaining checkout artifacts, such as the credit card vouchers and the printout for the checkout. At the end of the night, a manager performs a cash drawer checkout, which includes the cash accepted by the cashier from driver checkouts. In this case, a manager does not have to perform a separate checkout for each driver. See "Delivery" on page 3-30.

Disable Future Order Statement

The future order statement contains items and prices for unprepared future orders, as a means of providing customers with verification of their order. Unfortunately, some employees present the future order statement to guests as a guest check, without ordering the items. To avoid employee theft, you can now disable this option. See "To configure printing options:" on page 3-16.

POS Priority Printing

As of version 12.1, Aloha Takeout uses printing priorities established in the POS, when possible, on Aloha Takeout printed artifacts.

Print Label On Order Entry Complete

You can now print a label after confirming an order, without requiring the items to be sent to the kitchen. The label prints after you touch a button configured with the ORDER_ENTRY_COMPLETE button function. See "Label Printing" on page 3-17.

Updated Label Format

A sequence number and store unit number is added to labels, to assist with order assembly and customer feedback.

Bixolon Label Printer

Aloha Takeout now supports the Bixolon SLP-D420 label printer sold through NCR, which is an Ethernet printer driven by the Aloha Takeout windows service or the redundant Aloha Takeout master. This eliminates the dependency on a specific terminal for label printing. See "Configuring Bixolon Label Printers" on page 3-21.

ReferenceID Check Attribute

The ReferenceID, used by Aloha Online ordering, is now included in GChkInfo.dbf, when present, to assist with data mining.

Delivery Zone and Fee Added to Aloha Online

The system now passes the delivery zone and fee information in the response to online orders, which you can then display to the customer, as well as store the information with the above-store customer profile, as needed.

Phone Number Localization

Aloha Takeout provides localization configuration for non-U.S. phone number formats. You can define multiple area code, prefix, and exchange formats, to meet the location needs of your operation. See "Phone Numbers" on page 3-57.

Maximum and Minimum Delivery Fees

You can now establish and enforce a minimum delivery fee for small orders, as well as a cap for large orders, to prevent extreme charges to the customer. See "Delivery Fees" on page 3-56.

Adjust Quote Elements

A configuration tool is available to define which quote elements (call in quote time, delivery quote time, etc.) to display on the Info Bar. You can also define minute adjustment increments, to address various quote time needs. See "Info Bar Tab" on page 3-53.

Limit Aloha Takeout Screens by Job Code

To simplify Aloha Takeout for users, and to control access to orders and functions, you can now define which screens to make available for specific job codes. See "Create POS Job Codes for Aloha Takeout Employee Roles" on page 2-14.

We recommend visiting the Takeout screens by job code when upgrading to v12.1 and limiting screens for each job code as required by your operation.

Data Protection Tool

The Data Protection tool replaces the Aloha Takeout Key Manager utility, in compliance with PA-DSS v1.2 updates. In addition to site key creation and rotation, you can clear database credit card information, if necessary. See "Aloha Data Protection Tool" on page 5-9.

Overview of NCR Aloha Takeout

NCR Aloha Takeout is an independent module that works with the Aloha POS system to make your take-out or delivery business very easy to manage. The two modules work together to create, monitor, and maintain off-premise orders. Functions such as order entry, modification, taxation, and tendering of orders take place in the Aloha POS, per normal practice. Functions relating to linking orders to customer profiles, and organizing current and future orders for recall, update, and resolution take place in Aloha Takeout.

NCR Aloha Takeout also works behind the scenes to facilitate complex or automated functions, using virtual components, to accept Aloha Online orders, automatically release future orders at the appropriate time, and assign delivery orders to drivers.

NCR Aloha POS and NCR Aloha Takeout Data Usage

NCR Aloha Takeout uses data in a slightly different way from the Aloha POS system. It is important to understand these differences, to avoid possible frustration while trying to 'track down' configuration elements that may seem to 'vanish.'

Aloha POS stores configuration changes in the CFC SQL database. During the End-of-Day (EOD) or refresh process, Aloha makes these changes available to the Front-of-House (FOH) in the \%Local-dir%\Data directory by copying the appropriate files. This file copying process takes place regardless of whether changes were made during the previous day. One of the advantages of the configuration management tool (CMT) is POS and ATO options are stored in the same database. Configuration changes can be made at any time to either application. The CMT does not require a POS refresh before POS options are available in Takeout Settings. The CMT maintains data integrity between the two modules. The Refresh process makes configuration changes available to the FOH modules.

Based on these differences, the following, very high-level procedure for configuring these two program systems will help you to make the best of these data usage differences:

1. Install NCR Aloha Takeout, making it available for configuration in the CMT.
2. Run **Import** on an existing or copied Aloha Takeout Data directory.
3. Enable the store in Active Stores (CFC only).
4. Configure the CMT business and POS options to support Aloha Takeout.
5. Select **Maintenance > Takeout Configuration > Takeout Settings**, in the CMT, and configure Aloha Takeout, as required.
6. Refresh data.

> *If you are working on a 'live' system, we recommend performing all configuration and installation steps after the EOD has finished, but before the start of the first shift, to avoid unnecessary disruption of business caused by potentially repeated data refresh operations.*

You may discover additional configuration requirements during operational trials, after your initial installation and configuration. If this occurs, the following general process will help you to accomplish these changes with the greatest efficiency:

1. Re-open the CMT, to ensure all associated services are running.
2. Make all changes necessary in the Aloha POS system.

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3. Make all changes necessary in Aloha Takeout.

4. Refresh data.

Similar to the POS, ATO clients read the latest configuration data each time the client is started. ATO clients read from the %ATOPATH%\Data directory on the BOH. Aloha Takeout piggy backs off the POS refresh process to restart each client. The ATOStart.bat file is added to the Windows startup during Aloha Takeout terminal installation. When the terminal is restarted during refresh, ATOStart.bat relaunches the client and reads the latest configuration.

Version Updates

Upgrading Aloha Takeout is similar to upgrading the POS. Perform the upgrade only on the BOH. The ATO client that is present on each terminal reads the ClientBIN directory on the BOH, when starting and copying new binaries to the local %ATOPATH%\BIN directory. Once the copying of the new binaries is complete, the ATO client automatically restarts on a terminal with the latest version. Unlike the POS, restarts of the ATO client do not require the terminal to log off or reboot.

Virtual Relationships, NCR Aloha Takeout

Aloha Takeout makes use of virtual elements to accomplish the tasks required to manage your takeout or delivery business. A good understanding of what is happening in the 'virtual world' of Aloha Takeout may help to clarify these relationships for you.
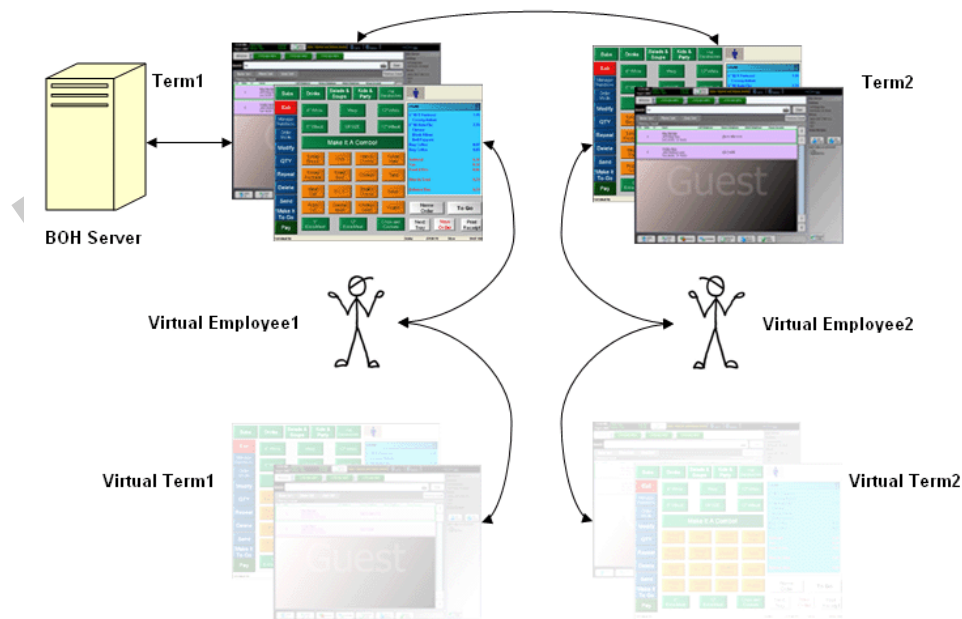

Figure i - 2 Virtual Relationships, Aloha Takeout

The parts of the Aloha Takeout system are as follows:

Aloha BOH file server	Is physical location of programs and databases, and provides primary network connectivity across the network.
Physical terminals	Actual terminals used by store employees to look up customer records, enter orders, and facilitate handing off orders to customers or drivers for off-site delivery, using Aloha POS and Aloha Takeout, as required.
Virtual terminals	Terminals used to perform complex or automated functions through the use of virtual employees.
Virtual employees	Used by Aloha Takeout as the logged in employee, when performing complex or automated tasks through Aloha Connect (COM). Virtual employees automatically carry out tasks behind the scenes, while actual store employees use terminals to perform other tasks, or even when no-one is logged in. Aloha Takeout clocks in virtual employees, at the first instance of need, and leaves them clocked in until the EOD runs.
SQL Server (not shown), installed on the Aloha BOH file server	Manages the customer database, using Aloha Connect to pass information between the master database and the order entry terminals.

How it works: Narrative Description

This section provides a narrative description of how the virtual and actual parts of the Aloha network work together to handle your takeout or delivery orders.

When a server needs to create a takeout or delivery order, it interacts with the assigned terminal to perform the following:

1. Locate or add the customer to the database.
2. Select an order mode to begin the order. Aloha Takeout creates the guest check, and applies the customer name to it.
3. Use the Aloha POS to add items to the order.
4. Finalize the order using a button configured specifically to work with Aloha Takeout, for example, one to which a 'custom activity' button function is assigned, such as FLEX_ENTRY_COMPLETE.
5. Aloha Takeout places the check number in the ATO database for later recall, displaying the order in the Pick Up or Dispatch screen.
6. Recall the order when the customer arrives to pick it up, or assign the order to a driver, when it is ready for delivery.

   ATO uses the POS queue functionality to quickly access and transfer checks between order takers, cashiers, and drivers.

7. Tender the order manually, or touch **Apply Payment** to use Aloha Connect to tender the order automatically using a stored payment, such as a credit card or house account.

   Aloha Takeout stores orders until the end of the day, when the Aloha Takeout End-of-Day process moves them to the historical tables and clears the active orders table in preparation for the new business day.

Aloha Connect (Interface Employees and Interface Terminals)

Aloha Takeout uses Aloha Connect, interface terminals, and interface employees, to accomplish several types of tasks. Examples of Aloha Connect functions are as follows:

- Creates the check, after an employee selects or creates a customer record and selects an order mode.
- Monitors the order status, and updates, as appropriate.
- Recalls an order to the FOH for updating.
- Releases a future order.
- Performs driver assignment and transfer functions.
- Passes stored payment information to the FOH.
- Calls the checkout function, when an employee touches **Checkout** on the Driver screen.
- Passes calculated delivery fees to the POS, for inclusion in an order.
- Accepts and processes orders from Aloha Online.

Aloha Connect functions also apply to training interface functions.

Payments

Payment activities do not occur natively within Aloha Takeout; instead, they occur within the Aloha POS and the system uses Aloha Connect to pass payment information between the two applications. Mapping the appropriate NCR Aloha POS tenders with functions performed in Aloha Takeout, on the **Maintenance > Takeout Configuration > Takeout Settings > Aloha Tenders** tab, improves the flow of orders to drivers and customers, as follows:

- Identifying a POS cash tender allows the system to automatically close delivery orders to cash, unless you configure the system to manually close delivery orders.
- Mapping payment card tenders in Aloha Takeout to the correct payment card IDs in the Aloha POS allows the system to apply credit card information stored in an ATO customer record to the appropriate payment card in the Aloha POS.
- Identifying the POS house account tender allows Aloha Takeout to interface with POS functionality that stores house account balances and provides billing. ATO also supports an invoice printing feature associated with house accounts.
- Identifying the POS prepaid tender to use for closing checks for orders placed by ATO customers who provide a delivery service allows you to tender delivery service orders efficiently.

Driver Financials

Drivers receive compensation for deliveries in several ways:

Hourly rate — An hourly pay rate received on their paycheck.

Tips — Cash or credit tips, which are deducted from the net cash owed by the driver on the driver checkout report.

Driver fees — A per delivery amount or check percentage that is deducted from the net cash owed by the driver on the driver checkout report. See "Create Employees" on page 2-22.

Mileage — A per day mileage fee that is calculated by the payroll company and paid on the driver's paycheck.

Financial accountability for an order remains with the takeout and delivery queue until the order closes, at which time the accountability transfers from the queue to the cashier or driver. The system closes all open checks left in the takeout and delivery queue to interface employees during the Aloha End-of-Day process. It is important to close and confirm all Aloha Takeout orders before the End-of-Day procedure runs.

> **CAUTION** ***The Aloha POS automatically closes orders left open in the ATO takeout and delivery queue to cash at End-of-Day. To avoid cash discrepancies, make sure to close all ATO orders on the Pick Up and Dispatch screens before running End-of-Day.***

Order Modes

As you configure Aloha Takeout, it is important to bear in mind that the program addresses the following three primary types of orders on a routine basis:

Walk-In — Orders in which a customer walks in, places an order, and waits for it to be prepared.

Call-In — Orders in which a customer calls in, places an order, then comes to the restaurant to pick it up.

Delivery — Orders in which a customer calls in, places an order, then waits for your business to deliver the order to a different location.

In addition to these order types, Aloha Takeout supports other types of order that can be very important to your business:

Future Orders — Orders in which a customer calls in and places an order for up to several years in the future. This feature makes it easy for you to accept orders for large parties, and other functions, thus expanding the capabilities of your business.

Curbside — Orders for concepts with one or more designated outside pick up parking spaces. You can configure Curbside orders to appear on the Pick Up or Dispatch screens.

Catering — Orders for concepts that provide food for groups of people, usually for some type of event. This feature uses a discrete, separate order mode for accepting orders for this type of business without resorting to using other order modes in unusual ways. The process of creating the order and assigning it to a driver (optional) does not require unrelated information, and does not require you to deal with on-screen processes that are part of a different order mode. Catering orders display on the Pick Up or Dispatch screen depending on configuration. A separate report is available for summarizing and analyzing your catering business.

Dine In — Orders mistakenly placed at the wrong counter or a counter that serves both dine in and takeout guests. Used in some Quick Service operations, a 'Convert to Dine In' button appears, when you configure the Dine In order mode in Aloha Takeout. This allows employees to quickly change an order to dine in before items are ordered (sent to the kitchen). This feature does not work once the items are ordered.

Web — Orders for concepts using Aloha Online to account for online sales. This allows you to target orders for a single destination (pickup or delivery). If guests can pick up or request delivery of online orders, Aloha Online passes the Call-In and Delivery order types as part of the online order, based on how the customer requested to receive the order.

Convert to Dine In (Quick Service only) — Customers approach the wrong counter, or a counter that serves both dine-in and takeout guests, and mistakenly place a takeout order when it should be a dine-in order. A Convert to Dine In button appears, allowing employees to

quickly change an order to dine-in before the items are ordered (sent to the kitchen). This feature does not work once the items are ordered. The primary function of this button is to switch the order from one that originated in ATO to one that originated in the POS so that screen flow is controlled by the POS, not ATO.

Configuration Best Practices

As you install and configure Aloha Takeout, we recommend you refer to the following list of best practices, to help you be successful as you place the program into operation.

- Create a unique order mode for each order type offered at your site, and assign a different order mode for each order type used in Aloha Takeout.
- Create one unique job code for the Aloha Takeout interface employees.
- Create one unique job code for the Aloha Takeout training interface employees.
- Create job codes for order takers, drivers, dispatchers, and takeout cashiers, as needed.
- Create job codes for training order takers, drivers, dispatchers, and takeout cashiers, as needed.
- Create one interface employee for each Aloha Takeout (interface) terminal.

    Enable **Must use Mag Card** on each interface employee. This requires the 'POS Password Method' be set to Optional or Required.

- Create one training interface employee for each Aloha Takeout (interface) terminal.

    Enable **Must use Mag Card** on each training interface employee. This requires 'POS Password Method' be set to Optional or Required.

- Create training employees for each training job code. (i.e. training driver, training order taker, training cashier).
- Create one Radiant Interface Terminal for each Aloha Takeout terminal.
- Set the receipt printer of the host terminal for each Radiant Interface Terminal. Alternately, you can configure all Radiant Interface Terminals to print to a single printer, so released future orders print to a consistent location.
- Set the Radiant Interface Terminal voucher printer to that of the 'Interface Host' terminal.

    Optionally set all Radiant Interface Terminal voucher printers to the printer attached to the 'dispatch' terminal.

- Create a unique Aloha Takeout queue.

    Quick Service — Configure physical terminals to their own queue in Quick Service, unless they share a 'drive-thru' queue.

    Clear 'Auto open new order' in Quick Service queue maintenance.

    Verify a unique queue is assigned to each Quick Service terminal.

    Do not assign job codes that interact with ATO orders to a queue in Maintenance > Labor > Job Codes > Order Entry tab.

    Configure interface terminals to the Aloha Takeout queue.

    Table Service — Create a unique Takeout queue for Table Service sites, ensuring the queue matches in both Store Settings > Delivery and Aloha Takeout Configuration.

- Create a unique void reason for future orders.

    Enable **For Aloha Connect Use Only**.

    Enable **Do Not Report**.

- Create a unique void reason for cancelled orders.

    Enable **For Aloha Connect Use Only**.

- Configure buttons, panels, and screens to optimize the order flow and reduce screen touches.

    Use button labels that easily identify the button's purpose and to reduce confusion.

- Configure petty cash accounts to properly transfer cash between drivers and cashiers.
- Configure ATO job code screens to limit employees to screens required to perform their duties.

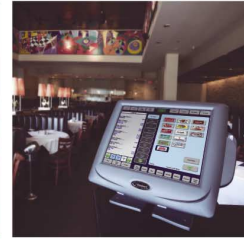# Operational Best Practices

When you begin to use Aloha Takeout, specific operational practices will help your operations flow smoothly.

- Do not access other orders, in POS, until a recalled Takeout order has been finalized.
- Adjust all driver tips from Aloha Takeout.
- Use the Drivers screen, in Aloha Takeout, to run driver checkouts, unless using driver mileage reimbursement.
- Implement nightly-backup and offsite-backup storage procedures of the Aloha Takeout SQL database.

    Configure the backup to occur five minutes prior to POS and ATO End-of-Day.

1 Installing ATO on the BOH File System

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Summary of BOH ATO Installation and POS Configuration

This section summarizes steps and configuration states for the back-of-house (BOH) file server. You can use this section to configure Aloha Takeout in Configuration Center (CFC) or the new Aloha Manager (7.0). The term "configuration management tool" (CMT) is used to address both Configuration Center and the new Aloha Manager. In the few cases where the configuration varies, both procedures are documented.

- [Install Aloha Takeout on the BOH File Server](#)
- Configure the Aloha POS options to work with Aloha Takeout.
- Configure the Aloha Takeout settings to meet your operational needs.

Preparations

1. Confirm **Aloha** and the **configuration management tool** are installed and operating correctly on the file server and terminals. **Note:** The configuration management tool installs SQL Express, as required by Aloha Takeout.
2. Verify the **security key** is licensed for Aloha Takeout, as required for the site.
3. Install **SQL 2005 Management Studi**o on the file server. (Optional, but recommended.)

- Both CFC and the New Aloha Manager automatically install SQL Express during installation.
- We recommend installing the configuration management tool before installing Aloha Takeout.
- SQL 2005 Management Studio is not installed as part of the CFC\New Aloha Manager install.
- We recommend SQL 2005 Management Studio is installed, as a best practice, in the event manual database management, backup, or recovery is needed.

---

4. Confirm the **Aloha NIC** is in the top position, in the Connections list:

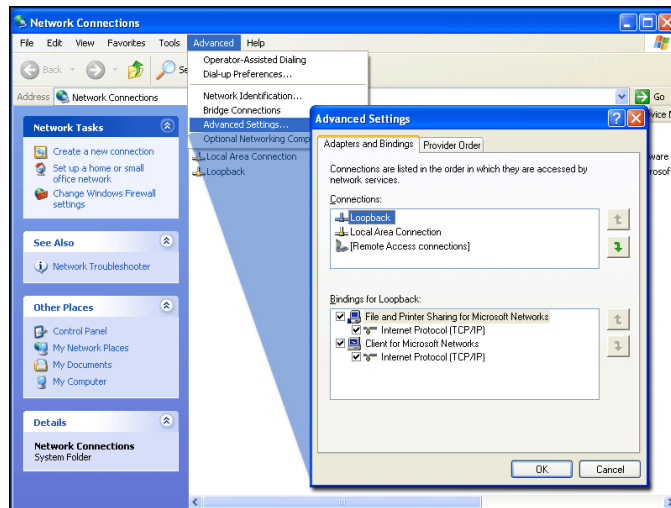**Windows XP:** In Network Connections > Advanced > Advanced Settings.

Figure 1 - 1 XP NIC Binding Order

Windows 7: Control Panel > Network and Sharing Center > Change adapter settings > Advanced > Advanced Settings.
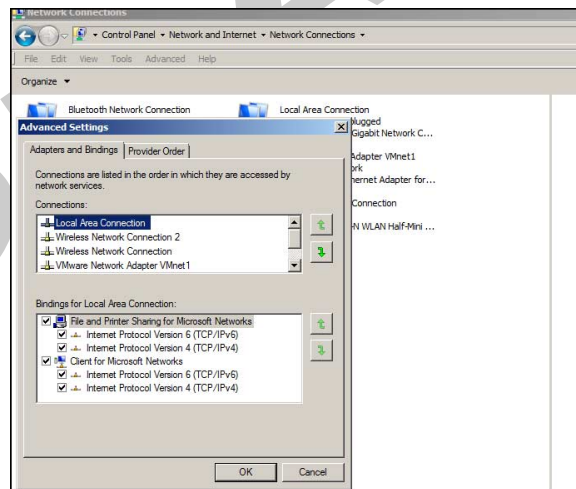

Figure 1 - 2 Win 7 NIC Binding Order

Install Aloha Takeout on the BOH File Server

You must install Aloha Takeout on the Aloha BOH file server, to successfully begin configuring Aloha Takeout. Installing Aloha Takeout is wizard-based and accomplishes the following:

- Installs the Aloha Takeout program, within the 'BootDrv share' by default.
- Installs a default database, designed to make the program operable.
- Attaches the Aloha Takeout database with Microsoft SQL Express 2005.

The installation file is typically available in a .zip file, from which you can extract the actual installation file. The file name is in the general format, 'AlohaTakeOut[*x.x.xxx*].msi,' with the '*x*' characters representing the version number of the file.

The same AlohaTakeOut[x.xx.xxx].msi is used for the FOH installation later in this guide.

To install Aloha Takeout on the Aloha BOH file server:

1. Obtain the **installation file** from the Aloha Update site, and copy it to a staging directory on the Aloha BOH file server within the BootDrv share directory (*not in the %Iberdir%\Bin directory*).
2. Double-click the **installation file** to begin the installation process.
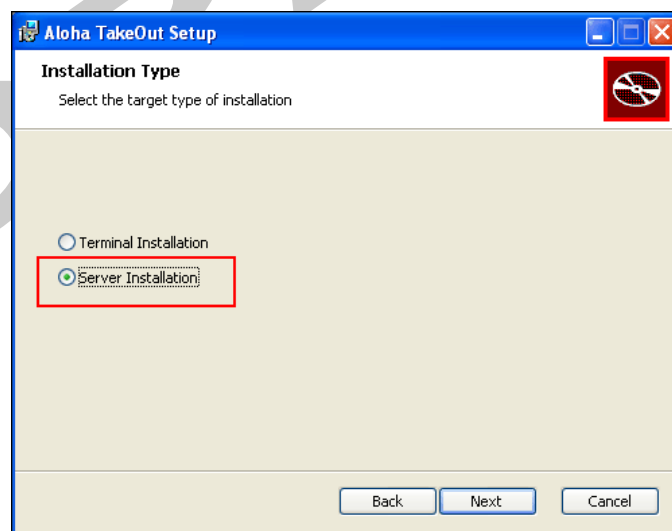3. Click **Next** in the installation wizard until the **Installation Type** step appears.

Figure 1 - 3 Aloha Takeout Setup, Installation Type

4. Select **Server Installation**.
5. Click **Next** and verify the new **Aloha Takeout** directory is the preferred destination. Browse to this directory, if it is not.
6. Click **Next** and follow the prompts to the end of the installation process.
7. Click **Finish** to complete the installation.

---

8. Copy the following **xaml files** from v1.2 UI.zip, available on Aloha Update. Select the folder from the extracted file that best matches the operation.

- Infocast2.xaml
- OrderModeButtons.xaml
- FutureOrderButtons.xaml

- OR -

Copy the **\Takeout\Data directory** from a prior Aloha Takeout installation.

After completing the installation procedure, only three steps remain, to bring your Aloha Takeout installation into operation:
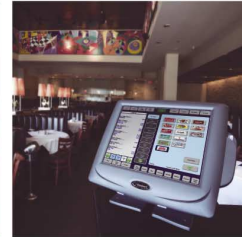
1. Configure the NCR Aloha POS system and NCR Aloha Takeout to work together, as described in this implementation guide.
2. Install Aloha Takeout on the FOH terminals.
3. Restart all terminals, to propagate the configuration established on the Aloha BOH file server to each terminal in the network.

Complete installation on the BOH file server, and complete all configuration before installing NCR Aloha Takeout on the FOH terminals. Refer to "Installing ATO on the FOH" on page 4-3 for information about installing NCR Aloha Takeout on the FOH terminals.

2 Preparing the Aloha POS System

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DRAFT

Several configuration steps are required, to prepare the Aloha system for use with Aloha Takeout. As you go through this process, you may find some requirements are already active in your current database, or you may find that some configuration elements are not relevant to your site. For example, if you already have a 'Walk-In' queue, or if you do not offer a delivery service, it is unnecessary to configure these.

> Beyond the required settings described in this section, you may encounter other configuration requirements that are beyond the scope of this document. Refer to the Quick Service or Table Service Reference Guides and Manager Guides for more information about how to configure the Aloha system.

In this section, we discuss the following topics:

Make Aloha Takeout Active

You, as the corporate database administrator, must enable Aloha Takeout as an installed product, to make Aloha Takeout available in the product panel for your client sites. Aloha Takeout is not active, by default, in the CMT. Once active, your sites can use the CMT to configure Aloha Takeout, in accordance with their permission levels.

To enable Aloha Takeout in the New Aloha Manager:

1. Log in to the **New Aloha Manager**.
2. Select **Quick Service** or **Table Service** in the product panel.
3. Select **Maintenance > Business > Store > Installed Products**.
4. Locate the **Products Installed group bar**.

Figure 2 - 1 Business, Store, Installed Products

5. Select '**Uses Takeout**' to make Aloha Takeout configuration options active on the product panel.
6. Click **Save** in the command panel.
7. Log out of **Aloha Manager**.

To enable Aloha Takeout in Configuration Center:

1. Log in to **Configuration Center** as a **global user**.
2. Select **Quick Service** or **Table Service** in the product panel.
3. Select **Maintenance > Business > Global Administration**.

4. Locate the **Products Installed group bar** section.
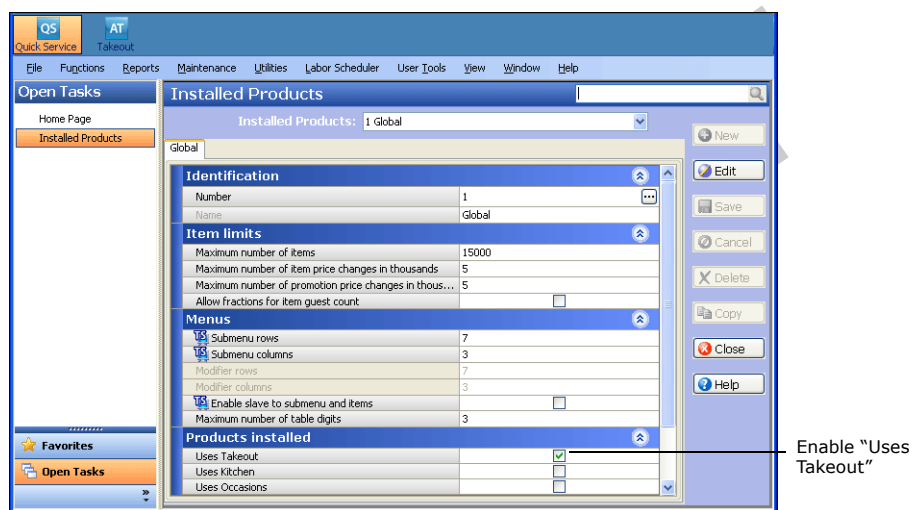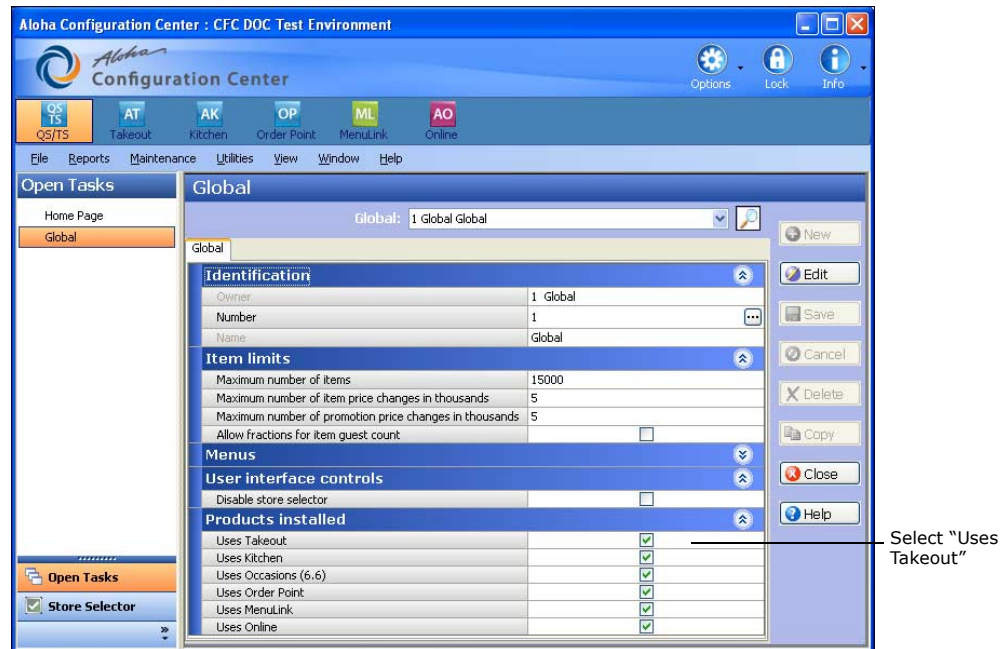

Figure 2 - 2 Global Administration, Global Tab

5. Select '**Uses Takeout**' to make Aloha Takeout configuration options active on the product panel.
6. Click **Save** in the command panel.
7. Log out of **Configuration Center**.

The CMT automatically enables COM and sets the External integrated software component for Aloha Takeout.

Import Aloha Takeout Data

You must import Aloha Takeout data into the configuration management tool, to begin configuring the program to run in your stores. Use another stores data directory or one of the sample Aloha Takeout databases available on Radiant Update.

To import Aloha Takeout data to the configuration management tool:

1. Select **Aloha Takeout** in the product panel.
2. Select **Utilities > Takeout > Run Import**.
3. Verify the correct **path** for Aloha Takeout appears in the **Folder** text box. Use the **Browse button** to change it, if necessary.
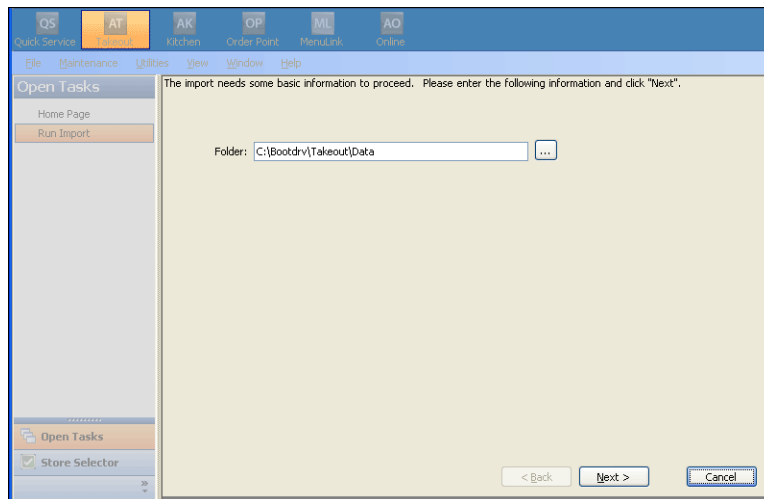

Figure 2 - 3 Data Import, Aloha Takeout Path Screen

4. Click **Next** to proceed with the import.
5. Inspect the **Import Report** to determine if significant errors occurred during the import.
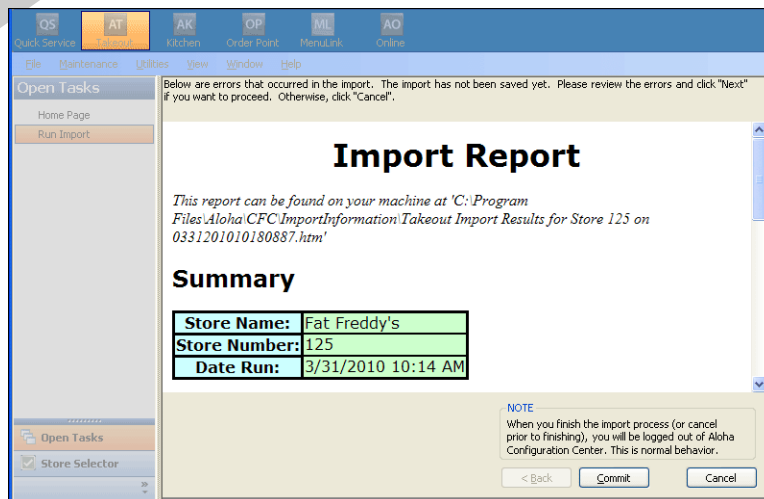
Figure 2 - 4 Data Import, Import Report

6. Click **Commit** if no significant errors are in the Import report.

7. Click **Finish** in the **Import Completed** screen. The configuration management tool automatically logs out at this point, as noted in this screen.
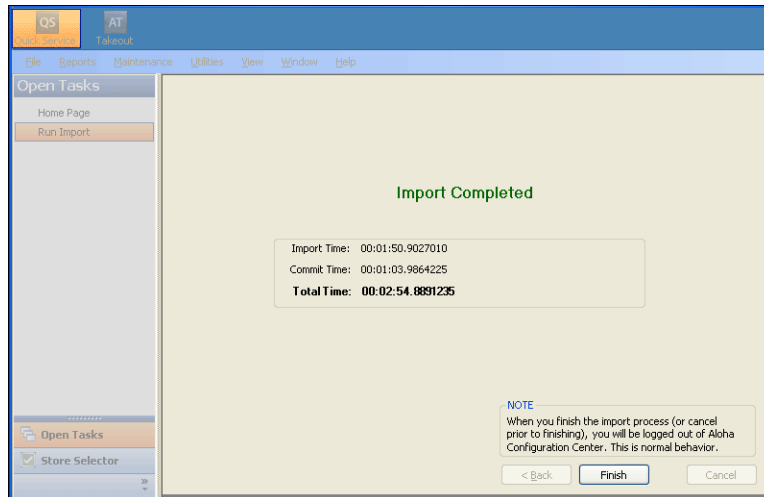

Figure 2 - 5 Data Import, Import Completed Screen

When you log in again, to the configuration management tool, the imported data is active and accessible.

Define Active ATO Stores in CFC

After enabling Aloha Takeout in Configuration Center, and completing the configuration, you must make Aloha Takeout active, to begin exporting configuration options to each store. In the case of Aloha Takeout, CFC updates the AlohaToGoConfig.xml each time a refresh is performed, overwriting the existing configuration at the store.

This approach makes it possible to hide Aloha Takeout functionality at stores that do not offer takeout or delivery services. Stores may also be set as inactive until training and equipment are completed ready for operations. Once a store is made active, it can begin using Aloha Takeout immediately after the next refresh.

To make Aloha Takeout active at the store level:

1. Log in to **CFC** as a **corporate user**.
2. Select **Maintenance > Takeout Settings > Active Stores**.
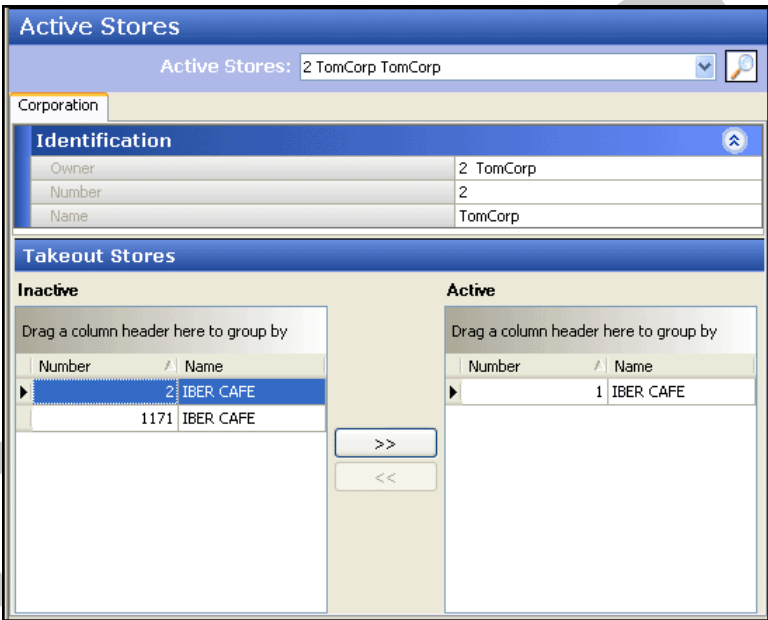
Figure 2 - 6 Takeout Settings Maintenance, Active Stores

3. Select a **store** from the Inactive list.
4. Click the **right arrow button** to move the store to the Active list. If you accidentally move a store to the Active list, you can select it, and use the left arrow button to move it back to the Inactive list.
5. Repeat **this procedure** to move as many stores as necessary to the Active list.
6. Click **Save**.
7. Log out of **CFC**.

These steps are not required in the New Aloha Manager.

Create Order Modes

As you configure Aloha Takeout, it is important to bear in mind that Aloha Takeout bases its screen flow and business functionality on order types. For example, the Delivery order type prompts for a customer name and address and the orders appear on the Dispatch screen. The Pick-Up order type prompts for a customer phone number and the orders appear on the Pick Up screen. In other words, the order type controls the data you must enter and the ATO screen from which you access an active order, to make the order-taking process more efficient.

For proper interaction between Aloha Takeout and the Aloha POS, you cannot share order modes between these two modules. Sharing order modes can have undesired results in the flow of order entry, the screens on which orders appear, whether you can assign an order to a driver, reporting, and more. You must create a unique POS order mode for each ATO order type you accept in your site. Later in the implementation, you will map each ATO order type to its counterpart in POS order modes.

To clarify, orders originating in the Aloha POS must go to POS-specific order modes and orders originating in Aloha Takeout must go to ATO-specific order modes.

NCR Aloha POS	**NCR Aloha Takeout**
A guest walks in to your restaurant, is seated, and places an order. Use the POS to initiate the order. The default order mode is Dine-In.	A guest walks in to the dedicated takeout area of your restaurant and places an order. Use ATO to initiate the order. The default order mode is Takeout.
⬇	⬇
The guest later orders a meal to take home. Add the meal to the guest check and use the To Go order mode to send the order to the kitchen.	Do not use the To Go order mode, because that would be "sharing" an order mode between these two modules.

Location: Maintenance > System > Order Modes

| Suggested Settings: Takeout Order Modes	Takeout	Pick-Up	Delivery
Order Mode tab			
Active	✓	✓	✓
All Items	✓	✓	✓
Include Ordered Items (QS Only) - Select this option, as it is needed to change the order mode in Quick Service.		✓	✓
Order Mode Info tab			
Service Charge - Select this option, if adding delivery fees to checks.			✓
Charge Line Text			Delivery Fee
Tax - Aloha Takeout cannot calculate tax on delivery fees, even if you select this option. A different amount than when the items are first ordered appears on the confirmation screen, and the system calculates tax for the service charge. When using Aloha Takeout, set this option to "None" to avoid any tax and total calculation discrepancies.			None (0)
Fixed - ATO calculates the delivery fee based on the defined Aloha Takeout configuration and passes the amount to the POS, replacing the 0.00 amount. See "Delivery Fees" on page 3-56.			0.00
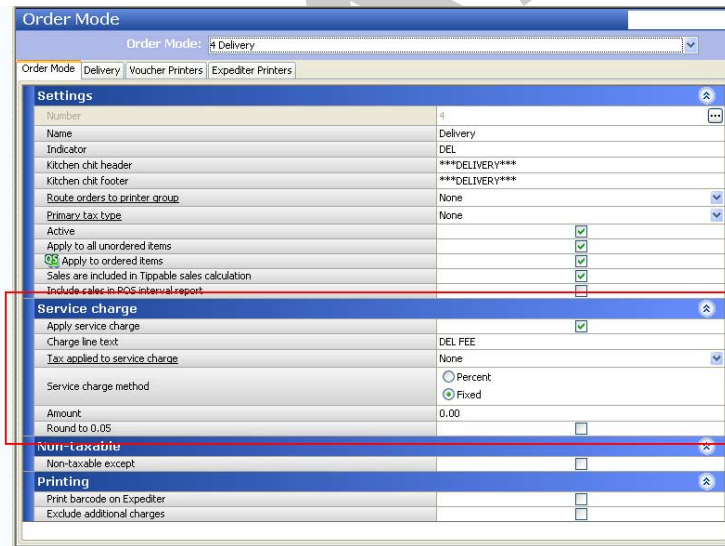
Figure 2 - 7 Aloha Manager, Order Modes Maintenance, Delivery Fee Quick Service and Table Service

Create POS Order Entry Queues

Add an order entry queue exclusively for use with ATO orders. Aloha Takeout stores orders to the defined 'takeout' queue, when finalizing new orders. Orders are recalled from the 'takeout' queue to the local terminal queue each time you access the order. Finalizing a recalled order returns the order to the 'takeout' queue.

1. If you do not already have an order entry queue that you can use exclusively for takeout or delivery orders, you must create one. Select **Maintenance > System Settings > Order Entry Queue**.
2. Create a **new order entry queue**, if one does not already exist.
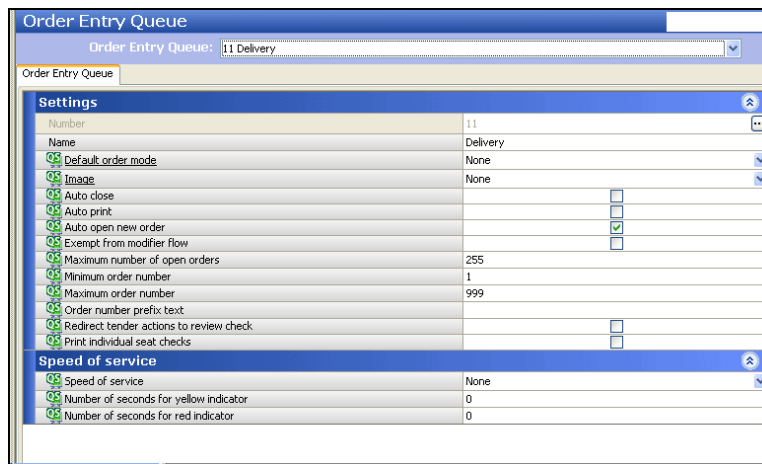

Figure 2 - 8 Order Entry Queues Maintenance

3. Click **Save** in the command panel, after creating each new order entry queue.

> **Notes**
>
> ATO orders remain unordered unless the 'Queue' defined in Takeout Settings matches the defined Order Entry Queue. See "Takeout & Delivery Queue" on page 3-4.

Location: Maintenance > System > Order Entry Queues

Suggested Settings: Order Entry Queues	Takeout Delivery?
Financial tab	
Queue ID	✓
Name	Delivery
Default Order (QS Only)	✓
Bitmap (QS Only)	Phone2.bmp
AutoClose? (QS Only)	✓
AutoPrint (QS Only)	✓
Exempt from Modifier Row (QS Only)	✓
Min Open Orders (QS Only)	✓
Minimum Order # (QS Only)	✓

Suggested Settings: Order Entry Queues	Takeout Delivery?
Maximum Order # (QS Only)	✓
Order # Prefix (QS Only)	DEL

Order Modes and Queues in TS

Table Service requires that queue and order modes used by Aloha Delivery are defined.

Defining the Delivery Order Queue

The order entry queue defined in Delivery must match that defined in Aloha Takeout for orders to be stored and recalled correctly.
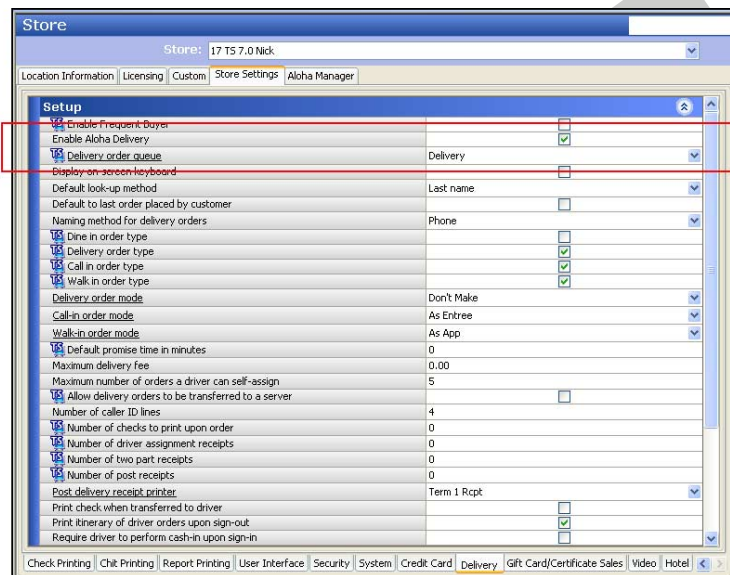

Figure 2 - 9 Delivery Order Queue

To align the queue in Delivery:

1. Navigate to **Maintenance > Business > Store Settings > Delivery** tab **> Setup** group bar.
2. Confirm **Enable Aloha Delivery** is enabled.
3. Select the **Delivery order queue**, defined earlier, from the drop-down list.
4. Click **Save**.

> ⚠️ **CAUTION**
>
> *Aloha Takeout is unable to store orders on the queue in Table Service if the queues selected in the POS and Takout settings are not the same. This usually results in the 'blue' un-finalized orders on the FOH.*

Defining Order Modes in TS

Table Service replaces the order mode that appear at the top of the submenu with those defined on the Delivery tab, when the logged in employee has a 'delivery' job code. A 'delivery' job code is determined when **Delivery driver**, **Delivery dispatcher**, or **Delivery order taker** is enabled in **Maintenance > Labor > Jobcodes > Order Entry** tab **> Delivery** group bar. It is important to define these order modes in the event you need to change an ATO orders order mode in Table Service.
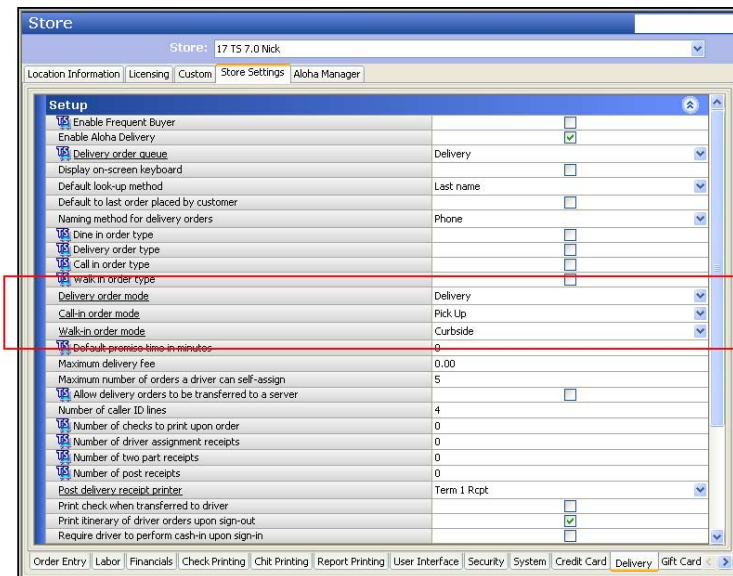

Figure 2 - 10 Aloha Delivery Order Modes

To set delivery order modes in Table Service for Aloha Delivery and Aloha Takeout:

1. Navigate to **Maintenance > Business > Store Settings > Delivery** tab **> Setup** group bar.
2. Select **order modes** from the drop-downs for Delivery order mode, Call-in order mode, and Walk-in order mode.
3. Click **Save**.

Create POS Job Codes for Aloha Takeout Employee Roles

The size, layout, and policies of an operation, as well as the number of employees, determine the job codes and associated configuration requirements you need to create. You may need to configure a separate job code for each Aloha Takeout employee role, defined below, or you may be able to combine the fucntions of more than one employee role into the same job code. Another option is to modify the existing Aloha POS job codes, such as servers, bartenders, cashiers, and hosts, to accommodate the functions of Aloha Takeout employee roles.

Employee Roles:	Abbreviation	Responsibilities:
Interface Employees	IE	Used "behind the scenes" by Aloha Connect, to release future orders and assign orders to drivers. Also referred to as "virtual employees," the interface employee plays an important role in the ATO environment and is mandatory in most configurations.
Order Takers	OT	Greet customers at the counter or answer the phone, create or locate existing customers, create orders, and associate payment information to an order. Recalling and editing current and future day orders may also be needed. In some operations, order takers also perform cashier functions and require cash drawer access.
Takeout Cashiers	CSHR	Collect payment from customers arriving to pick up orders. May also provide driver bank, drop, and checkout functions, add or edit customers, and perform order taker functions. Cashiers require cash drawer access and assignment.
Dispatchers	DISP	Manage the organization and assignment of delivery orders, monitor driver food production and assembly. Delivery zones help dispatchers organize orders into runs for driver assignment. Driver management, dispatch, and return are often handled by the dispatcher. Dispatchers may be limited to viewing only the Dispatch and Drivers screens in Aloha Takeout.
Drivers	DRVR	Organize and pack orders at the store and walk, ride, or drive the order to the customer location, collect payment from the customer, and often held accountable, at checkout, for the orders delivered. Drivers may also fulfill order taker and dispatch functions.

The following job code configurations are intended to provide minimum guidelines for each employee role in the Aloha Takeout environment. Adapt and combine options to meet your specific operational needs. For each job code you create, "mirror" that job code configuration for the training equivalent of that employee role, with the exception that you must also select the 'Training' option located on the Job Code tab.

> **Notes** It is very important to pay careful attention to job code configuration, as Aloha Takeout functionality depends heavily on this configuration.

Figure 2 - 11 Jobcodes > Jobcode

Figure 2 - 12 Jobcodes > Order Entry
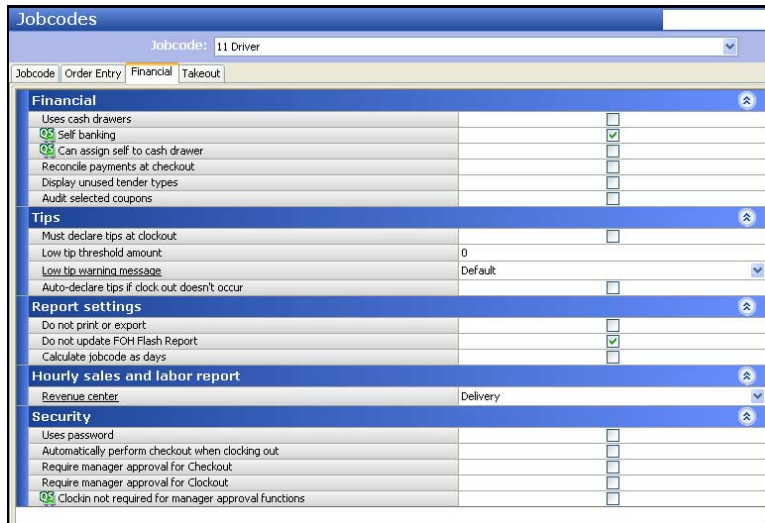
Figure 2 - 13 Jobcodes > Financial
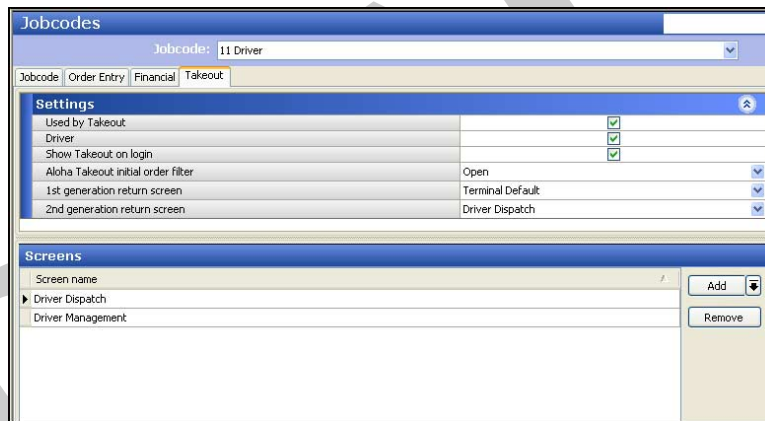
Figure 2 - 14 Jobcodes > Takeout

Location: Maintenance > System > Job Codes

Suggested Settings: POS Job Codes	IE	OT	CSHR	DISP	DRVR
Job Code tab					
Shift Required to Clock In/Out — Select this option for all ATO jobcodes to perform functions.	✓	✓	✓	✓	✓
Exclude from Labor Scheduling — Enable this option to allow Interface Employees to clock in automatically, even if they are not scheduled.	✓				
Order Entry tab					
Order Entry — Allows designated employees to enter orders.	✓	✓	✓		

Suggested Settings: POS Job Codes	IE	OT	CSHR	DISP	DRVR
Can get checks from other employees — Allows designated employees to retrieve checks from other employees.	✓	✓	✓	✓	✓
Exclude Takeout Employees from checkout restriction — Aloha limits the last employee, with access to a queue, from checking out when there are open checks within the queue. This option allows you to exclude jobcodes, such as interface employees and managers, from counting as an employee with access to the ATO queue when determining checkout rules. In this case, a cashier or order taker may be prevented from checking out, even though there are interface employees and managers still clocked in.	✓				
Order Entry Screen (QS) — Choose the screen that best allows the employee in this role to perform their job function.		✓	✓		✓
Order Entry Queue (QS) — Choose the takeout order entry queue created earlier in the implementation. Interface employees need access to the delivery queue. Leave the queue as "None" for the cashier as they may address orders from other queues.	✓	✓			✓
Check Type (TS) — Choose either Tabs or Tables and Tabs, to allow the employee in this role to access Aloha Takeout checks, created as 'tabs,' on the queue.		✓	✓	✓	✓
Use Floor Plan (TS) — Choose a floor plan that contains button functions necessary for the employee in this role to perform needed tasks, which may include navigating to ATO.		✓	✓	✓	✓
Delivery driver — Select for drivers, to allow a driver to access the delivery queue and to print delivery information on the driver checkout report, including driver fee calculations, if configured in Maintenance > Labor > Employees > Delivery tab. Enables the 'Track Mileage' option. **Note:** Table Service prevents employees with the Delivery Driver option selected from placing orders. Drivers are configured in Aloha Takeout through another configuration option. Quick Service allows drivers to enter orders as of v6.7.					Optional
Can assign order to self — Used with Delivery/Frequent Buyer application. No equivalent functionality in Aloha Takeout. **Required Option:** Delivery driver must be enabled for this option to appear.					N/A
Prompt for mileage — Select for drivers, to prompt a driver to record starting and ending mileage at employee clock-in and checkout, respectively. Ending mileage is available on the Labor Report. **Note:** Touching the Checkout button on the Aloha Takeout Driver screen does not prompt for ending mileage. Use Track Mileage only if drivers checkout exclusively through the POS. **Required Option:** Delivery driver must be enabled for this option to appear.					Optional
Delivery dispatcher — This option does not apply to ATO other than to provide designated employees access to the ATO queue in Table Service.					

Suggested Settings: POS Job Codes	IE	OT	CSHR	DISP	DRVR
Delivery order taker — This option does not apply to ATO other than to provide designated employees access to the ATO queue in Table Service.	✓	✓	✓	✓	✓
Financial tab					
Uses cash drawers — Enables designated employees to be assigned to a cash drawer for accepting payments.	✓	✓	✓		
Self banking — Designated employees manage payments and other cash transactions without a cash drawer. Payments are accountable to an employee and reconciled during checkout.					✓
Takeout tab					
Used by Takeout — Enables designated employees to interact with ATO.	✓	✓	✓	✓	✓
Driver — Enables driver functionality within the ATO interface.					✓
Show Takeout on login — Enables the ATO interface to appear over the POS when employees log in.		✓		✓	✓
Aloha Takeout initial order filter — Defines the initial filter applied to orders within the ATO interface.	N/A	Open	Open	Unas-signed	Driver
1st generation return screen — Defines the return screen when using ATO v1.1 or earlier. The return screen appears whenever you finalize an ATO order. Functions that finalize an order include storing, ordering, and tendering.					
2nd generation return screen — Defines the return screen when using ATO v1.2 or later. The return screen appears whenever you finalize an ATO order. Functions that finalize an order include storing, ordering, and tendering.					
Screens — Defines the screens that are available to each					

Create POS Access Levels

Additional options are added to Access Levels to allow or restrict ATO specific functionality. Options appear in the CMT depending on the version. Use the table below to create and configure access levels to meet your operational needs.

Figure 2 - 15 POS Access Levels > Aloha Takeout

Figure 2 - 16 POS Access Levels > Financial
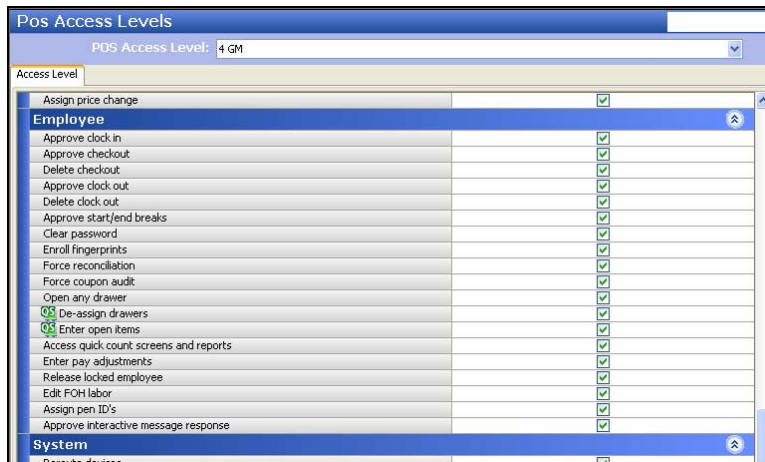
Figure 2 - 17 POS Access Level > Employee

Location: Maintenance > Labor > Access Levels

Suggested Settings: POS Access Levels	IE	OT	CSHR	DISP	DRVR	MGR
Aloha Takeout group bar						
Can override order capacity — Enables employee with the specified access level to authorize additional orders for a specific time frame, on a given day, in excess of the defined capacity.	✓			✓		✓
Can override restricted dispatch — Enables employee with the specified access level to temporarily authorize drivers to depart to 'out of sequence' deliveries. This option helps prevent drivers from selected preferred routes or customers.	✓			✓		✓
Can override 'No order assignment until after bump' — Enables employees with the specified access level to assign an order to a driver before bumping the order in the kitchen. This option is for use only with Aloha Kitchen.	✓			✓		✓
Can Override 'Required Aloha Loyalty Member ID for new guests' — Enables employes with the specified access level to override the requirement to enter an Aloha Loyalty ID number when creating a new customer record.	✓					✓
Authorize Deposit Refunds — Enables employees with the specified access level to refund a deposit previously accepted as partial payment for a future order.	✓					✓
Authorize Deposit Surrender — Enables employees with the specified access level to authorize the surrender (forfeiture) of a deposit previously accepted as partial payment for a future order.	✓					✓
Driver Management — Enable employee with the specified access level to perform driver management activities, such as closing or opening drivers**.**	✓			✓		✓
Approve Driver to Driver Transfers — Enables employees with the specified access level to transfer orders from one driver to another.	✓			✓		✓

Suggested Settings: POS Access Levels	IE	OT	CSHR	DISP	DRVR	MGR
Change Promise Time for Active Orders — Allows designated employees to change the promise time for orders already released and available in the 'Pick Up' or 'Dispatch' screen. This allows the employee to move the order to another time or time segment based on customer request.	✓	✓				✓
Can adjust order mode changes — Makes it possible for designated employees to modify charges added to an order based on the order mode, such as delivery or mileage fees. One employee per shift should have this capability, to adjust order mode charges that appear insufficient or excessive.	✓					✓
Can override delivery area restrictions — Makes it possible for designated employees to permit accepting orders from customers addresses outside the defined delivery area.	✓			✓		✓
Can add customer credit — Enables designated employees to add a credit to a customer account. This feature is often used to compensate a customer for trouble experienced with an order.	✓					✓
Can add/edit tax exemptions — Enables designated employees to add tax exempt status to a customer record, or to modify this status, once enabled.	✓					✓
Financial group bar						
Apply Tax Exempt — Enables designated employees to apply tax exempt to an order.	✓	✓				✓
Split checks — Allows designated employees to split checks.	✓					✓
Reopen check — Allows designated employees to reopen checks that are incorrectly tendered and closed.	✓					✓
Delete payments — Allows designated employees to remove payments from an order if applied in error.	✓					✓
Adjust payments — Allows designated employees to adjust payment amounts and tips after they are applied to an order.	✓					✓
No sale — Allows designated employees to open the cash drawer without entering and tendering an order.	✓		✓			✓
Cash refunds — Allows designated employees to authorize cash refunds. This is required to refund a deposit that was originally tendered to cash.	✓					✓
Non-cash refunds — Allows designated employees to authorize non-cash refunds. This is required to refund a deposit that was originally tendered to a non-cash or credit card tender.	✓					✓
Credit card refunds — Allows designated employees to authorize credit card refunds. This is required to refund a deposit that was originally tendered to a credit card.	✓					✓
Employee group bar						
Approve clock in — Allows designated employees to perform cash functions.			✓		✓	✓

Refer to "Deposits" on page 3-11 for more information about the Deposits feature, and how to enable and configure the NCR Aloha system and NCR Aloha Takeout to support it.

Create Employees

Create or add interface, order taker, cashier, dispatcher, and driver employees, as needed, by your operation. Create one or more 'training' employees for each job role, to provide new employees the ability to learn your operation using training mode.

Each physical and interface terminal pair requires one corresponding interface employee. The CMT uses the first appropriate defined job code when automatically clocking in an interface employee . This virtualized structure enables Aloha Takeout to clock in or log in the virtual employee, when the system needs to access the associated virtual terminal. You can assign the same 'interface employee' job code to all interface employees. ATO clocks in interface employees based on the job code defined in Aloha Takeout Configuration > Aloha Terminals > 'Job Code' field.

Create one interface employee for each interface terminal, assign it to a manager access level, be very careful to choose the 'interface employee' job code created earlier in the implementation for each new employee record. Then mirror the new employee records to create one training interface employee for each interface terminal, being careful to select the 'training interface employee' job code created earlier in the implementation.

Employee maintenance provides options pertaining to driver reimbursement. Although these settings were originally designed for Delivery\Frequent Buyer, they also work with Aloha Takeout. Driver fees reimburse drivers for deliveries through the checkout or labor report. You may choose to configure multiple driver fees for an employee. Delivery fees and driver fees are not related.

Figure 2 - 18 Employee > Employees

Figure 2 - 19 Employee > Jobcodes

Figure 2 - 20 Employee > Delivery

Location: Maintenance > Labor > Employees

Suggested Settings: POS Employees	IE	OT	CSHR	DISP	DRVR
Employee tab					
Must Use Mag Card — Select this option for each interface and training interface employee. Aloha Takeout automatically creates the password, thus preventing actual employees from abusing the interface employee log-in and permissions. If ATO is unable to automatically clock in interface employees, use the 'Clear Password' function to remove any previously created interface employee passwords. Refer to the terminal debout for information pertaining to the inability of ATO to clock in interface employees.	✓				
Job Codes tab					
Job Codes — Select a defined jobcode that allows an employee to perform the correct ATO functions.	✓	✓	✓	✓	✓
Access Levels — Select a defined access level that restricts or allows the proper authorization of functions.	✓	✓	✓	✓	✓
Rates — Type the hourly rate of the employee.	✓	✓	✓	✓	✓
Delivery tab					
Driver fee amount per order — Defines the amount per delivery order the driver is reimbursed on the driver checkout.					✓
Driver fee percent — Defines the percentage of the tippable sales check amount the driver is reimbursed on the driver checkout.					✓
Driver fee per mile — Used with Delivery/Frequent Buyer application. No equivalent functionality in Aloha Takeout.					N/A
Drivers license expiration date — Defines the drivers license expiration date. Default is 00/00/0000 which disables the expiration functionality.					✓
Insurance expiration date — A driver whose insurance has expired cannot be assigned to an order without manager override.					✓

Create Radiant Interface Terminals

Aloha Takeout uses virtual terminals interacting with physical terminals, in combination with virtual employees, to monitor and manage customer records and orders. As stated previously, we recommend giving these entities similar names, to make configuration easier.

You need to create one Radiant interface terminal for each physical terminal you intend to use for Aloha Takeout transactions.
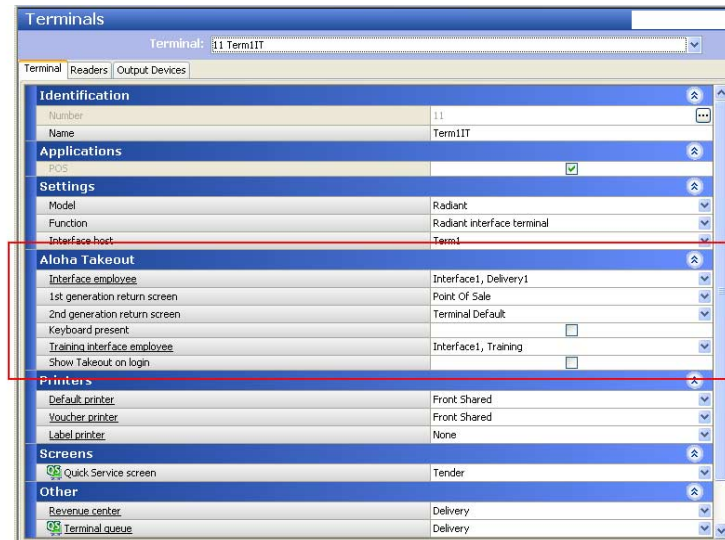
Figure 2 - 21 Terminals Maintenance

1. Select **Maintenance > Hardware > Terminals.**
2. Create a **new terminal** and type a **name** that references the physical terminal to which it relates. Terminal names may be site- or company-specific, but if you select names that relate to each other for physical and interface pairs, it will make database configuration much easier for you. For example: Name the interface terminal for **Term1** "ATO IT1."
3. Select **Radiant interface terminal** as the terminal 'Function'.
4. Select the same **Revenue center** to which the physical 'Interface Host' terminal is assigned.
5. Select the '**takeout queue**' as the **Terminal queue** (Quick Service only) for the interface terminal.
6. Select the **physical terminal** to which the interface terminal relates from the **Interface host** drop-down list.
7. Select the **Interface employee** for the terminal.
8. Select the return screen (optional) for the host terminal. Although the return screen is configured on the interface terminal, this functionality applies to the order entry terminal.
9. If using the first generation user interface, select the return screen from the **1st generation return screen** drop-down.
10. If using the second generation user interface, select the return screen from the **2nd generation return screen** drop-down.
11. Enable the **Keyboard present** option if using the first generation user interface and there is a USB keyboard physically connected to the terminal. Note: This option has no affect with the second generation user interface.
12. Select the **Training interface employee** defined for this terminal from the drop-down.

    ATO uses the first job code for the employee as the 'training job code'.

---

13. Enable **Show Takeout on login** if the terminal is permanently located in the takeout area. All employees logging onto this terminal are directed to the ATO screen. Job codes not defined for Aloha Takeout functionality display a button to return to the POS.

14. Click **Save**.

15. Repeat **this process,** as required, to create an interface terminal for each physical terminal you intend to install and use for Aloha Takeout transactions. In most cases, this is all 'order entry' terminals.

Use the following guidelines, as you create the new virtual terminals.

- Give the **new terminal** a name referencing the physical terminal to which it relates. Terminal names may be site- or company-specific, but if you select names for physical and interface pairs that relate to each other, it will make database configuration and troubleshooting much easier for you.
- Select **Radiant interface terminal** for the 'function'.
- Select the same **Revenue center** to which the physical terminal is assigned.
- Select the 'takeout queue' as the **Terminal queue** (Quick Service only)
- Select the **physical terminal** to which the interface terminal relates from the **Interface host** drop-down list.
- Create one **interface terminal** for each physical terminal you intend to use for Aloha Takeout transactions.

There are no separate licensing requirements or fees for Radiant Interface Terminals created in support of Aloha Takeout. The license for Aloha Takeout is sufficient for these virtual terminals. This type of terminal is available in Aloha v6.2.15 or later. You can install NCR Aloha Takeout on all terminals without additional license costs.

CAUTION

Confirm each terminal meets the recommended hardware requirements before configuring and installing ATO on that terminal. Refer to "System Requirements" on page i-viii

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Create Comp for Customer Credit

When customers experience trouble with an order you can often make amends with a compensatory credit for their next order, as entered using the Customer Credits feature. Create a specific comp for Aloha Takeout orders by accessing **Maintenance > Payments > Comps**.

Figure 2 - 22 Customer Credit Comp for Aloha Takeout

Configure the comp as follows:

- Specify a **name** for the comp, and a **Check Name** ('Check' field) to appear on the guest check (required).
- Specify the **maximum amount** allowed for the comp (recommended).
- Select **Active** (required).
- Select '**Manager required'**, to require a manager to approve the comp (optional).
- Select the **Prompt for amount** 'Method' to require the employee to enter an amount for the comp (required). This amount is calculated by ATO and passed to the POS.

After configuring Aloha Takeout to make use of this comp, an employee can credit the customer any amount; however, two factors limit customer credits when applying the comp:

1. If the customer credit value associated with the guest exceeds the 'Maximum amount' threshold defined for the comp, the POS limits the credit to the 'Maximum amount' threshold.
2. If the customer credit value associated with the guest exceeds the subtotal of the check, the POS limits the credit to the subtotal of the check. Any unused balance is not carried over.

Create Petty Cash Accounts for Drivers

A total of four **petty cash accounts** are needed to monitor cash moving to and from delivery drivers, and into and out of cash drawers. Create these accounts, if they do not already exist, by accessing **Maintenance > System > Petty Cash Account**.

Driver Bank

Cash To Driver — Select 'Cash To Driver,' to designate this as the petty cash account to use when moving "starting bank" money from the cash drawer to the driver, *from the perspective of the driver.*

Cash From Store — Select 'Cash From Store,' to designate this as the petty cash account to use when moving "starting bank" money from the cash drawer to the driver, *from the perspective of the cashier.*

Driver Drop

Cash To Store — Select 'Cash To Store,' to designate this as the petty cash account to use when the cashier receives money from the driver, *from the perspective of the driver.*

Cash From Driver - Select 'Cash From Driver' to designate this as the petty cash account to use when the cashier receives money from the driver, *from the perspective of the cashier.*
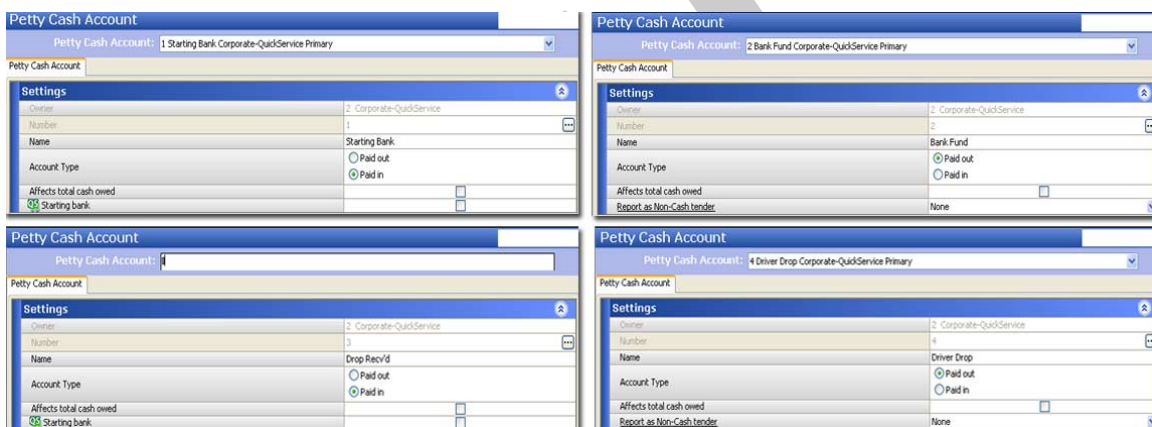
Figure 2 - 23 Petty Cash Account Maintenance, Petty Accounts

Create a Void Reason for Future Orders and Order Cancellations

Aloha Takeout requires you to create and use a unique void reason for a future order that is voided versus a regular order cancellation. As a best practice, we recommend you create unique void reasons used only for Aloha Takeout.

To create these void reasons, select Maintenance > System Settings > Void Reasons:

- Aloha Connect requires the **Future Order Void Reason,** to clear items from the check when storing a future order in the Aloha Takeout database. This is different from FOH interaction that does not require a void reason to clear items off a check. Items are not ordered at this point and are not returned to inventory. Aloha Takeout later orders the items based on the promise and prep time values. This process prevents an unfulfilled future order affecting current day sales and inventory levels.
- The **Order Cancel Void Reason** is used to quickly cancel orders through Aloha Takeout or from Aloha Online, in the event the customer changes their mind. Because items are considered ordered at this point, this will follow traditional void functions.

Void Reasons Options

Return voided items back to inventory — This option may be turned on for the Order Cancel Void Reason. The decision to enable depends on the ability to return these items to inventory. If the items are typically prepared and 'wasted' as a result of the cancelled order, clear Return Voided Items to Inventory. If the items are prevented from being prepared, or can be reused, enable Return Void Items to Inventory.

Items for the Future Order Void Reason are not ordered. Clear the Return voided items back to inventory option for this void reason.

For Aloha Connect Use Only — Hides the defined void reason on the Aloha POS FOH void screen, preventing the mis-use of the void reason for operational purposes. We recommend selecting this option for both the future order and order cancellation void reasons.

Do Not Report — Prevents the reporting of voids on the Void Report. We recommend selecting this option for the future orders void reason.
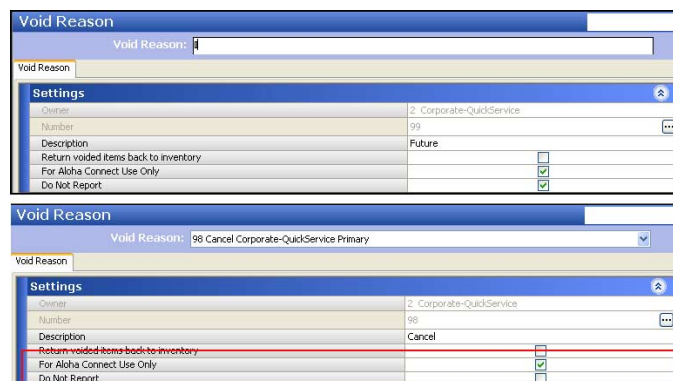
Figure 2 - 24 Void Reason Maintenance, Future Order Void Reason

Create House Accounts

As of v12.1, you can set up Aloha Takeout customers to take advantage of POS house accounts for payment and billing. POS house accounts are imported and updated during the Aloha Takeout End-of-Day or when the "Radiant Takeout and Delivery" Windows service is restarted. POS House Accounts are maintained in **Maintenance > Payments > House Accounts**.

Account # — The POS ID house account ID.

Account Name — The alpha-numeric name of the house account. This is used for billing identification and look up on the FOH.

Name Group Box — The company contact for the house account, first, middle, and last name; typically the person who approves and can clarify charge and billing questions.

Telephone — The telephone number for the house account contact.

Address — The mailing street address for the house account contact, city or town, state, and postal code; this is used for mailing statements and billing information.

Inactive — Limits house account functionality in the POS and Aloha Takeout. Inactive house accounts may be associated with customers, but show as "Inactive" in ATO and are not available for billing. ATO restricts house account functionality when the **Inactive** option is enabled the selected customers account.

Figure 2 - 25 House Account Maintenance

Create Tenders

House Account Tender

You must create a house account tender when using POS house accounts with Aloha Takeout, if one does not already exist. Aloha Takeout applies the associated house account tender through Aloha Connect when touching **Apply Payment**. This button is only visible when a 'house account' order is selected on the Pick Up or Dispatch screen, or the order is associated with a stored payment.

1. Click **New** and select the **House Accounts** 'Type' option to work with POS house account tracking and posting
2. Configure the house account tender name, overpayment, and tips options on the Tender tab. Set the tender to **Active** and **Track**.
3. Enable **Require identification** and set the **Minimum** and **Maximum** values to match your house account numbering
4. Click **Save**.

> **Notes** ATO passes the house account number associated with the customer through Aloha Connect to the POS.

Figure 2 - 26 Tender Maintenance, House Account

> Requires POS versions 6.4.33.2056, 6.5.27.3752, 6.7.15.1877, 7.0.1.5390 or later, to properly support the tendering of house accounts through COM.

Prepaid Tender

Defines the tender used for the prepaid functionality. This feature was requested to quickly tender 'delivery service' orders from the confirmation screen. Reimbursement is exchanged at a later time based on the payment report or other means.

1. Click **New** and select the **Generic** 'type' option from the drop-down list.
2. Type a **name** for the prepaid tender.

---

3. **Verify** 'Allow Overpayment' and 'Allows Tips' are **disabled** since the delivery company is paying the exact amount on the checks.
4. Select **Active** and **Track**.
5. Do not enable **any options** on the 'Type' tab, as the prepaid tender is a 'non-cash' generic tender.
6. Click **Save**.

Figure 2 - 27 Prepaid Tender

Deposit Tender

Use the Deposit tender to generic reduce the balance due when a future order containing deposits is released. Each deposit associated with the future order is applied as an individual 'deposit.' This offsets the cash or credit card payments previously applied against the deposit on the un-released future order. The cash or credit card payment applied to a deposit is reflected in a previous days bank cash drop or credit card batch.

1. Click the **New** drop-down and select the **Generic** 'Type' option from the drop-down list.
2. Type a **name** for the deposit tender.
3. **Verify** 'Allow Overpayment' and 'Allows Tips' are **disabled** since the delivery company is paying the exact amount on the checks.
4. Select **Active** and **Track**.

5. Do not enable **any options** on the 'Type' tab, as the deposit tender is a 'non-cash' generic tender.
6. Click **Save**

Figure 2 - 28 Tender Maintenance, Deposit

Tipped Credit Card tenders

It is not customary to tip or prompt for tips in quick service and quick casual operations; however, when adding delivery services to these type of operations, it may be customary to tip the driver. To accomplish this, set up a duplicate set of credit card tenders, with the difference being in how you configure the 'Allow Tips' and 'Report As' options. Be sure to enable tips and select the lower ID tender in 'Report As' for reporting. Configure all other options the same as the 'non-tip' tender

Figure 2 - 29 Tipped Credit Card Tender

Create Items

To support various features, Aloha Takeout requires you to configure the following three items in **Maintenance > Menu > Items:** Deposit, Deposit Surrender, and Unavailable Item Indicator. We recommend not attaching these items to a submenu or panel, as you do not want employees to add these items to a check through the POS.

Deposit Item

Create an "open item" for the Deposit item, so that you can add this item to a check and enter variable amounts, depending on the amount of deposit requested. The customer pays for the 'deposit check' with cash or a credit card.

- Deposits paid with cash tenders increase the "Deposit (Calculated)" line on the sales report.
- Deposits paid with credit card tenders increase the credit card report totals and batch for that day.
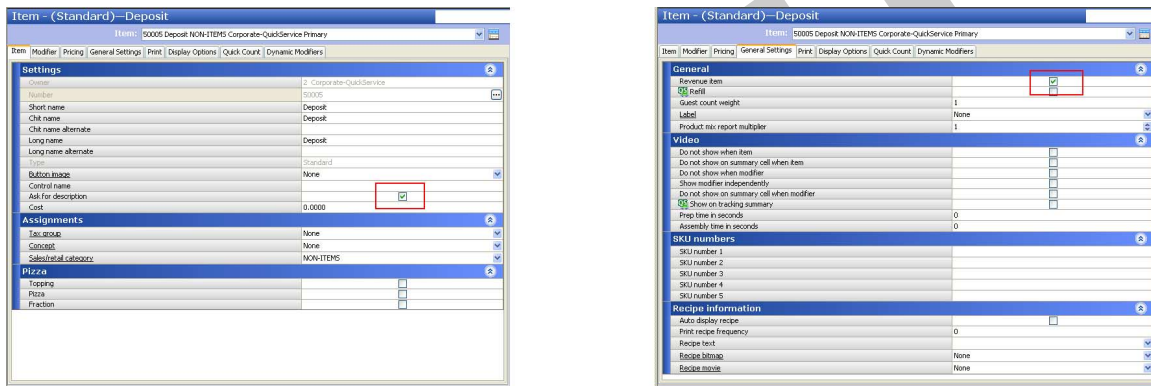
Figure 2 - 30 Item Maintenance, Deposit

Create one Deposit item:

1. Click the **New** drop-down and select **Standard** as the 'Type.'
2. Type the name of the deposit item in the name fields. The text defined for 'Long name' prints on a guest check.
3. Enable Ask for Description to allow Aloha Takeout to enter information on the check.
4. Select a **Tax Group** associate with a Tax Type that has a zero percent tax.
5. Select a **Sales/retail category** where you would like deposits to report.
6. Select the Pricing tab and select the **Ask for Price** 'Pricing method' from the drop-down.
7. Select the General Settings tab and enable **Revenue item**.
8. Click **Save**.

9. Select **Revenue Item**, located on the Miscellaneous tab, to prevent the deposit from affecting sales in the Aloha POS.

> *Notes* Items configured as 'Revenue items' in the Aloha POS do not affect sales. The system recognizes the sales by the items associated with the future order on the day the order is released. The deposit amount offsets the balance due amount on the release date and is reported by the 'deposit tender.'

> Do not define a tax for the 'deposit item.' Aloha Takeout will not be able to fully tender the check, if tax is calculated on this item.

Deposit Surrender Item

A "surrendered" deposit is a deposit for which the guest will not receive reimbursement should they cancel their order. When a guest surrenders their deposit, add the Deposit Surrender item to a guest check for the amount of the original deposit. The deposit then becomes revenue and reflects on the Aloha sales reports as such.

> *Notes* Unlike the 'Deposit Item,' the 'Deposit Surrender' item is a sales item, and reflects on the Aloha sales reports as such. This accounts for the revenue recognized by the surrender of the deposit.

Figure 2 - 31 Item Maintenance, Deposit Surrender

Create one Deposit Surrender item:

1. Click the **New** drop-down and select **Standard** as the 'Type.'
2. Type the name of the deposit item in the name fields. The text defined for 'Long name' prints on a guest check.
3. Enable Ask for Description to allow Aloha Takeout to enter information on the check.
4. Select a **Tax Group** associate with a Tax Type that has a zero percent tax.
5. Select a **Sales/retail category** where you would like deposits to report.
6. Select the Pricing tab and select the **Ask for Price** 'Pricing method' from the drop-down.
7. Click **Save**.

Unavailable Item Indicator

The 'unavailable item indicator' prints on the kitchen chit when a future order item cannot be released because:

- Someone changed the parent item to "unavailable" in item availability in the POS.
- Required modifiers are not met.
- Someone changed the modifiers associated with the parent item to unavailable in the POS.
- Someone made database changes that caused the parent or modifier item ID to be incorrect or no longer exist.

An *Unavailable Items* section prints in the Aloha Takeout header, alerting the kitchen staff there are unavailable items on the order. This feature forces a kitchen chit to print, even if the only item on the order is unavailable.

Create one Unavailable Item Indicator:

1. Click **New** and select **Standard** to create a new item in **Maintenance > Menu > Items**.
2. Type text in **Chit name,** to use for alerting the kitchen staff there is an item missing from the order.
3. Select a **Tax Group** that has a zero percent tax rate.
4. Select the **Sales/retail category** for the item.
5. Select the **Item Price** 'Pricing method' from the drop-down on the 'Pricing' tab.
   a. Set the **default price** to **0.00**.

6. Select **Print on check when price is zero** on the 'Print' tab.
7. Set the **printer group** to all kitchen printers in **Maintenance > Menu > Item Routing**, to alert the kitchen staff at any station an item is unavailable for the order.
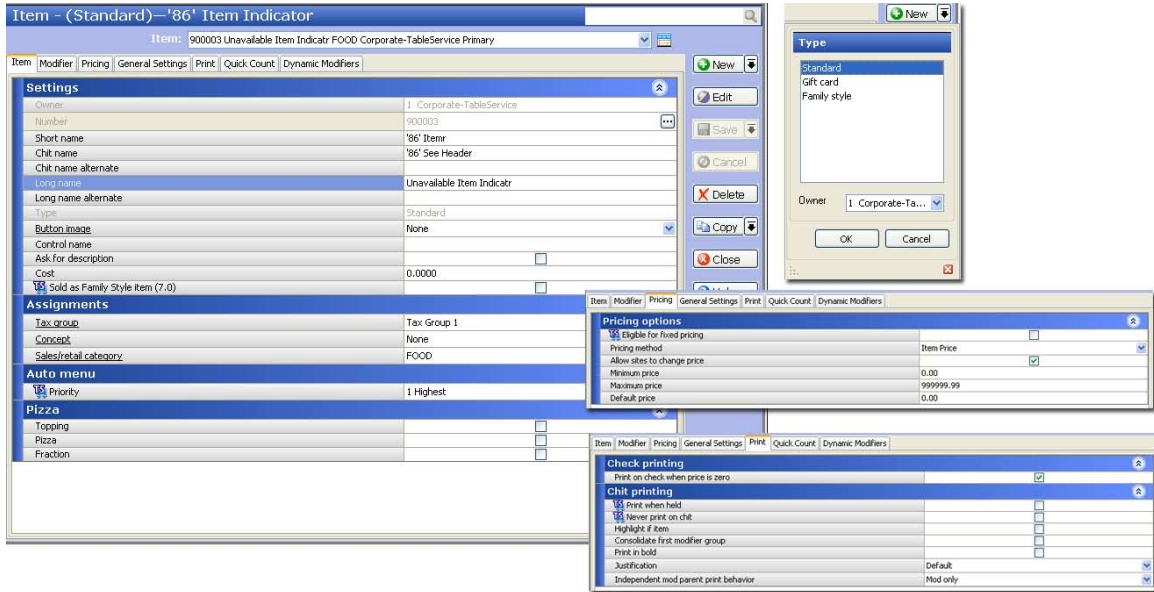
Figure 2 - 32 Unavailable Item Indicator

Do not define an item price or associate the Unavailable Item Indicator item to a button on a submenu or modifier panel.

Figure 2 - 33 Unavailable item chit header

Create Categories

Aloha Takeout requires you to create two categories, in order to print items from these categories on Aloha Takeout artifacts.

Grocery Item Category

The Grocery Item category includes items to print on the driver itinerary to remind drivers to take them on the delivery run. Examples of grocery items are canned and bottled beverages, pre-made salads, and extra sauce packets. Aloha Takeout consolidates the count of each 'grocery item' and prints it in a section on the driver itinerary. The objective is for the driver to check the 'grocery item' section of the driver itinerary and confirm they have the appropriate number of these items before they depart for a delivery run.

To configure a grocery item category:

1. Click **New** and select **General** to create a new category in **Maintenance > Menu > Categories**.
2. Enable **Aloha Takeout Grocery Category**.

Figure 2 - 34 Category Maintenance, Grocery Items

3. Select the 'Items' tab and use the arrows to move **grocery items** from the Available to the Included frames.
4. Click **Save**.

Label Printing Category

You typically do not print a label for every item. For example, beverage cans and sauce cups usually do not require a printed label; however, entrees and other kitchen produced items require a label. Create a "label printing" category that consists of non-sales categories of items that require a printed label, using the following guidelines: "General"

- If all items requiring a printed label print to a single label printer, you only need one 'label printing' category.
- For sites using multiple label printers, create a label printing category for each location in which a label printer resides.

If using multiple label printers, type logical names for the label categories, such as "Grill Label," "Pizza Label," or "Salad Label," to help with configuration. See "Label Printing Categories" on page 3-21 to define label printing categories in Hardware > Printer configuration.

Figure 2 - 35 Category Maintenance, Label Category

Used by Aloha Takeout is not enabled on 'label printing categories.'

To configure a label printing category:

1. Click **New** and select **General** to create a new category in **Maintenance > Menu > Categories**.
2. Clear **Aloha Takeout Grocery Category**.
3. Select the 'Items' tab and use the arrows to move **label items** from the Available to the Included frames.
4. Click **Save**.

Establish Navigation Between the POS and Aloha Takeout

How you configure the POS and Aloha Takeout to switch between these two applications plays an important role in the success and efficiency of fast-paced takeout and delivery environments. Depending on the role of the employee, you can have Aloha Takeout appear upon login, you can display the POS order entry screen with buttons to navigate to Aloha Takeout, or Aloha Takeout buttons can appear on a secondary screen. Ultimately, the goal is to guide the employee through the order flow and allow them to navigate between the two applications with the least number of button touches.

- Bartenders and servers may enter takeout orders on a limited basis depending on the stores takeout business and the availability of dedicated takeout employees. Configure these job codes with the POS as the primary screen. Add a button to an existing floor plan screen and order entry panel, to allow switching to takeout, when necessary. This is usually a secondary screen.
- Dedicated phone order takers can view Aloha Takeout immediately upon login, allowing them to immediately look up, or add, the customer on the phone and start an order. Enable 'Show takeout on log in" to set Aloha Takeout as the primary screen. Based on the 'return screen,' these employees can go right back to Aloha Takeout, ready for the next phone call, after completing an order.
- You can limit navigation for drivers and dispatchers to Aloha Takeout. Using 'Show Takeout on Login,' and not providing screen or return screen navigation back to the POS, these job codes remain in Aoha Takeout when logged in.

The POS and Aloha Takeout provide three ways of navigating to Aloha Takeout:

1. Show Takeout on Login, floor plan, and QS order entry panel.
2. TS order screen panel buttons and QS order entry panel buttons.
3. Return screen.

Log In Navigation

Employees view various 'home' screens, based on the POS and Aloha Takeout configuration, following log in. Use the following configuration options to configure each job code to meet operational needs.

Show Takeout on login — Upon login, the system automatically navigates the employee to the 'return screen' designated for the job code to which the employee is assigned. This reduces the need to touch another button on the Table Service floor plan or Quick Service order entry screen to switch to ATO, and is commonly used for order taker, driver, and dispatcher job code. For example, you can configure the Look Up screen to automatically appear for employees who log in using the order taker job code, so they can immediately search for and enter new customers as guests calling in to place takeout and delivery orders; you can configure the Dispatch screen to automatically appear for drivers and dispatchers, so they can assign orders for delivery. See Job Code options in Aloha Takeout configuration for more information. 'Show Takeout on login' is available for both job codes and terminals; selecting this option for terminals, located in takeout and delivery areas of the restaurant, helps with navigation.

Bartender — (**Table Service only**) Upon login, the system automatically navigates the employee to the Fast Cash screen for bartenders, so they can quickly address bar patrons. This option overrides the 'Use Floorplan' option at login. Employees assigned to a job code, with 'Bartender' selected, require an order screen panel to navigate to Aloha Takeout, or need access to a defined floor plan configured with an Aloha Takeout navigation button, to perform takeout functions. Enable the Bartender option in **Maintenance > Labor > Jobcodes > Order Entry** tab.

Use Floor Plan — (**Table Service only**) Upon login, the system automatically displays the floor plan screen specified in the job code under which the employee is currently logged in. You can configure multiple floor plans and assign them to various job codes based on the need to navigate to Aloha Takeout. The floor plan may contain zero, one, or multiple Aloha Takeout navigation buttons. Select 'Use Floor Plan' and specify the floor plan screen to appear in **Maintenance > Labor > Jobcodes > Order Entry** tab.

Order Entry Screen — (**Quick Service only**) Similar to 'Use Floor Plan,' upon login, the system automatically displays the order entry screen specified in the job code under which the employee is currently logged in. Screens may contain various navigation buttons, or no navigation buttons, depending on what the employee assigned to the job code needs to address with regard to ATO orders. Specify the order entry screen to appear in **Maintenance > Jobcodes > Order Entry** tab.

Order Entry Screen Navigation

Once logged in and on an order entry screen, switching between the POS and ATO is possible by adding buttons to an Aloha FOH panel. Whether you are configuring Table Service or Quick Service determines where and how you add the buttons for screen navigation and finalizing orders.

Order Screen Panel — (**Table Service**) To support the interaction between the POS and ATO, you can customize the Table Service action item area of the screen, located below the submenu. To accomplish this, you must create an Order Screen panel, and then use the event scheduler (**Maintenance > System Settings > Event Schedule - Set Order Screen Panel**) and assign the event schedule to an **Activation Schedule**, to make the new panel visible to employees, by job code. This configuration overrides the default screen buttons in the action item area and allows you to add or remove buttons to meet the operational needs of the job code. Use the "FLEX_ENTRY_COMPLETE" custom text on a 'Custom Activity' button to finalize the active check. You may add navigation parameters to the 'Information for external application' line, to transition the user to the desired screen. See . If you require more than six buttons to support POS and ATO functions, create additional Order Screen panels, linked by the Chain button function. In this configuration, we recommend creating one Order Screen panel for POS functions and one Order Screen panel for ATO functions.

Label the Custom Activity buttons so they are intuitive to employees. Set the button name, in the "Text" field, to match the button's function and navigation parameter.
For example:

- If the button takes the employee to the Look Up screen, label the button "Look Up."
- If the button finalizes the order, label the button "Send," "Store," or "Finalize."

Button names should be labeled based on your operation or training verbiage.
If the button name is too long or performs multiple functions, consider adding two or more buttons with the same Custom Activity function, yet labeled differently to help with employee use.
We do not recommend using "FLEX_ENTRY_COMPLETE" or "FLOW_ORDER_TO_TAKEOUT" as button labels since they do not make sense to employees.

Order Entry Screen — Most Quick Service screens contain a check panel for order entry. When logging in or continual interaction with the FOH, button functions are configured with custom activity functions to support navigation from the FOH to Aloha Takeout. 'Script' functions may include 'chains' to other Quick Service panels, as well as a 'custom activity function. The objective of using chains and panels is to set the Quick Service screen panels for the next logical view when you return from Aloha Takeout to Quick Service. The next logical view would contain panels with commonly ordered items or a 'home' screen.

Return Screen Navigation

The POS and Aloha Takeout contain several options that help with navigation. You can configure specific ATO screens as the landing screen through POS button parameters; however, if a navigation parameter is not defined, the job code return screen, terminal return screen, or the last ATO screen displayed is used as the landing screen in ATO. Determining the POS landing screen to display when navigating from ATO to POS requires planning. The displayed POS landing screen depends on the following:

- Touching **Modify** in ATO displays:

  - Quick Service: The active POS check and last set of panels that made up the screen.
  - Table Service: The active POS check and submenus.

- Touching **Tender** in ATO displays:

  - Quick Service: The Quick Service screen ID defined in the **Maintenance > Takeout Settings > Panel Options > Aloha tender screen** drop-down. is used as the 'tender' screen. This reduces button touches, if there are no tender buttons defined on the 'home' screen. See "Panel Options" on page 3-43. Requires Aloha POS v6.7 or later.
  - Table Service: 'Tender' screen.

- Closing an Aloha Takeout check in POS or ATO lands you on the defined job code or terminal return screen. If 'PointofSale' is the designated return screen:

  - Quick Service: Displays the last set of panels.

    - As a best practice, you can leverage the **Script** button function, including **Chain**, to define the set of panels the FOH employee sees when returning from ATO to POS. Use these functions to prepare the employee for the next screen to display, especially if one of the ATO screens is set as the return screen for the employee.
  - Table Service:

    - Fast Cash screen, for bartenders.
    - Floor plan screen, for job codes with floor plans.
    - WWT (working with tables\tabs) screen, for all others.

- Touching **Log Out** in ATO brings POS to the foreground, logs out an employee , and displays the floating logo.

Use the following POS and Aloha Takeout options to customize the navigation to meet your operational needs.

Select a Custom Activity

A button function, available in Quick Service and Table Service, makes it easy to create buttons that make navigation, with associated processes, easy to configure and put into operation. This button Function is 'Custom Activity' from the Action drop-down. Aloha Takeout supports several functions for this button function, and makes them flexible through the use of command line parameters. Command line parameters enable you to navigate to specific Aloha Takeout screens, and to pre-select an order mode.

FLEX_ENTRY_COMPLETE — This 'Custom Activity string is the most commonly used in Aloha Takeout and performs the following functions:

- Calls the confirmation screen or return screen.
- Orders items on the check upon confirmation.
- Ignores order items when there is not an active order entry check or the current check is not an ATO check.
- Supports navigation command line parameters.

Operations using the FLEX_ENTRY_COMPLETE custom activity string usually have an order flow that supports this type of entry. Employees are trained to:

1. Ask for the customer name.
2. Ask for the order type.
3. Enter items on the check.
4. Confirm and finalize the order.

You can use FLEX_ENTRY_COMPLETE on any screen (TS floor plan, TS order entry, Quick Service).

Quick Service - Configure the Custom Activity Interface button function within a script that includes custom interface activity FLEX_ENTRY_COMPLETE, as well as Chain functions, to define the logical panels the next time the FOH is displayed.
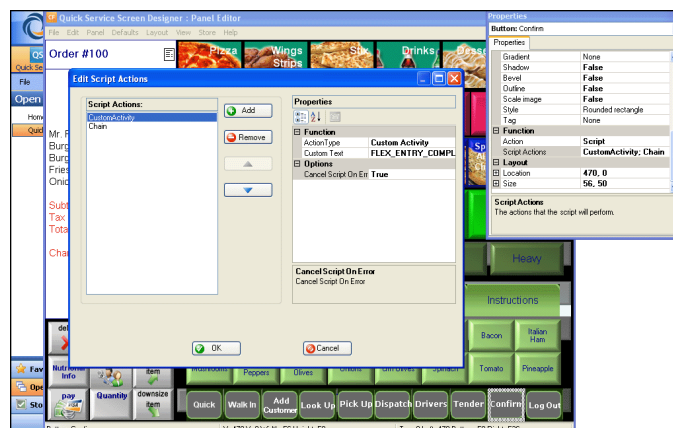
Figure 2 - 36 Quick Service Script button function containing FLEX_ENTRY_COMPLETE

FLOW_ORDER_TO_TAKEOUT — This 'Custom Activity' string transitions a non-ATO check, containing unordered items, directly to the ATO customer search (Customer Selection) screen. This allows you to associate the selected customer with the check and convert a POS check to an ATO order.

> FLOW_ORDER_TO_TAKEOUT only works with checks with unordered items. Checks with ordered items cannot be converted to an Aloha Takeout order.

Operations using this 'custom activity string usually have an order flow that supports this type of entry. Employees are trained to:

1. Start a new check and enter the items.
2. Ask for the customer name.
3. Ask for the order type (if not using an order mode parameter. See "Using Command Line Parameters to Specify Order Modes" on page 46.)
4. Finalize the order.

This works well in fast paced takeout environments. This also works well for conversational ordering when the customer immediately begins placing the order.

FLOW_ORDER_TO_TAKEOUT allows you to add the order mode as a parameter or prompt the employee for the order mode after assigning the order to a customer.

> Although it can be used with FLEX_ENTRY_COMPLETE, screens and panels are usually configured for one flow or the other.
>
> You can also enable the confirmation screen with FLOW_ORDER_TO_TAKEOUT; however, it is common practice to disable order confirmation in this configuration, to minimize screen flow.

DELAYED_ORDER — This 'custom activity' string transitions the order flow directly to the Delayed Order dialog box, from which you can select a date and time for the order before transitioning to the POS to enter items on the order. The Order Confirmation screen provides options to delay the order. For this reason DELAYED_ORDER is not widely used. This string is most helpful in environments in which future orders make up the majority of the takeout business, like catering operations.

Using Command Line Parameters

Some Custom Activity strings also accept command line parameters. You can use these parameters to automatically select the order mode or the destination screen. These command line parameters are effective with or without the use of the Order Confirmation screen. Command line parameters currently work with the following 'custom activity types:

- FLEX_ENTRY_COMPLETE
- FLOW_ORDER_TO_TAKEOUT
- DELAYED_ORDER

Navigation Parameters

You can use the following command line parameters to pass navigation instructions to Aloha Takeout, as the order process transitions from the Aloha POS to Aloha Takeout.

Parameter	Screen Navigation
LU	Look Up screen
PU	Pick Up screen
DP	Dispatch screen
DM	Driver screen
FD	Future screen

When creating a new button, use these command line parameters as shown in the following example, with no space between the custom activity string and the command line parameter:

FLEX_ENTRY_COMPLETE/LU

In the example provided, an order entry screen button would take the employee straight to the Look Up screen, after finalizing the order.

> A button configured with a command line parameter overrides job code and terminal return screen configuration.

Using Command Line Parameters to Specify Navigation

Some ways in which you can use custom activity button functions, with or without command line parameters, are listed below, beginning with a label you can use to make the function of the button easier for employees to understand:

Button Label	Custom Activity Function	Action Performed
New Phone Order, or Phone Ringing	FLEX_ENTRY_COMPLETE/LU	Accesses the Look Up screen for Caller ID response.
New Future Order	FLEX_ENTRY_COMPLETE/FD	Accesses the Future Order screen for quick creation of new future day order.
Dispatch Drivers	FLEX_ENTRY_COMPLETE/DP	Accesses the Dispatch screen, for assigning delivery orders to drivers and dispatching them.
Recall Pickup, or Guest Pickup	FLEX_ENTRY_COMPLETE/PU	Accesses the Pick Up screen, for tendering, closing, and transferring orders to call-in or walk-in customers.
Confirm Order	FLEX_ENTRY_COMPLETE	Finalizes the order and invokes the job code or terminal return screen functionality.
Order Flow to Take-out	FLOW_ORDER_TO_TAKEOUT[Nav=PU]	Converts a new POS order to a takeout or delivery order by placing focus on the Customer Selection screen, then moving to the Order Confirmation Screen for normal functions there. Final step is to navigate to the Pick Up screen.

Using Command Line Parameters to Specify Order Modes

In addition to navigation functions, the FLOW_ORDER_TO_TAKEOUT string enables you to add command line parameters to automatically specify the order mode to apply to the check. You can use these parameters individually or in combination with the navigation command line parameters previously discussed. Order mode parameters only work with the FLOW_ORDER_TO_TAKEOUT custom activity string. The following table lists the command line parameters available for specifying order modes:

Order Mode	Command Line Parameter	Example Command Line (Including Navigation Parameters, When Appropriate)
Call In	CallIn	FLOW_ORDER_TO_TAKEOUT[Nav=PU,Mode=CallIn]
Walk In	WalkIn	FLOW_ORDER_TO_TAKEOUT[Nav=PU,Mode=WalkIn]
Delivery	Del	FLOW_ORDER_TO_TAKEOUT[Nav=DP,Mode=Del]
Eat In	EatIn	FLOW_ORDER_TO_TAKEOUT[Nav=PU,Mode=EatIn]
Drive Thru	DriveThru	FLOW_ORDER_TO_TAKEOUT[Nav=PU,Mode=DriveThru]
Curbside	Curbside	FLOW_ORDER_TO_TAKEOUT[Nav=PU,Mode=Curbside]
Fax	FaxedIn	FLOW_ORDER_TO_TAKEOUTNav=LU,Mode=FaxedIn]
Online	Web	FLOW_ORDER_TO_TAKEOUT[Nav=LU,Mode=Web]

> **Notes**
>
> Note that all command line parameters are extensions of the command line itself, with no spaces in the string.

Using Command Line Parameters in Combination

As mentioned in previous sections, you can use the FLOW_ORDER_TO_TAKEOUT custom activity string with no command line parameters, or you can add a command line parameter for navigation, order mode, or both. The correct syntax for these three possibilities is as follows:

No command line parameter	FLOW_ORDER_TO_TAKEOUT
Single command line parameter	FLOW_ORDER_TO_TAKEOUT[Mode=CallIn]
Single command line parameter	FLOW_ORDER_TO_TAKEOUT[Nav=PU]
Two command line parameter	FLOW_ORDER_TO_TAKEOUT[Nav=PU,Mode=CallIn]

Add ATO Buttons to QS FOH

You must add buttons to the FOH in Quick Service to support navigation between the POS and Aloha Takeout, and to make the flow of orders through the store and off-site smooth and logical. After careful analysis of order flow and existing panel design, select **Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels**, and add the buttons you need to a panel easily accessible from anywhere in the FOH. Use the 'custom activity' button functions, within a script, to accomplish the required navigation between the POS and Aloha Takeout and establish the order flow you need.
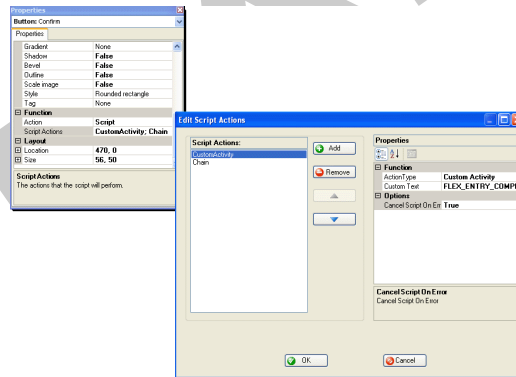
Figure 2 - 37 Panel Editor, Creating a 'Custom Activity' Button

Add as many buttons as needed to support additional navigation or ease of use, to meet operational needs.
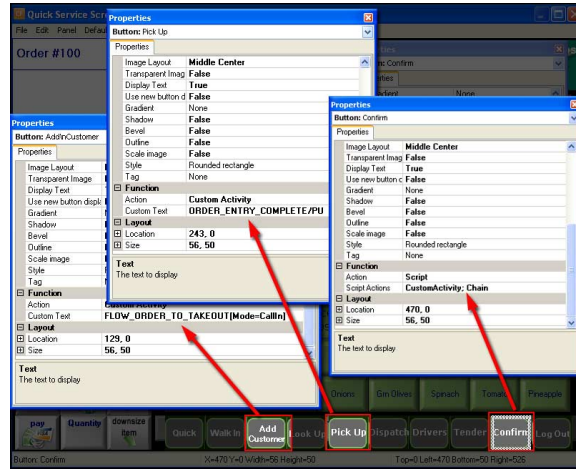
Figure 2 - 38 Quick Service Panel Editor

If necessary, create multiple buttons with the same function but different button text, to help guide new users through the order flow.

Add ATO Buttons to TS FOH

You must add several buttons to the FOH in Table Service to support Aloha Takeout. Two methods are commonly available to make this access easy.

Adding Buttons to an Order Screen Panel

The simplest way to insert Aloha Takeout buttons into the Table Service environment is to create an Order Screen panel for display in the action item area of the order entry screen, and create the new buttons on this panel. After careful analysis of the current and desired order flow, select **Maintenance > Screen Designer > Table Service Screen Designer**, and create a new, custom order screen panel.
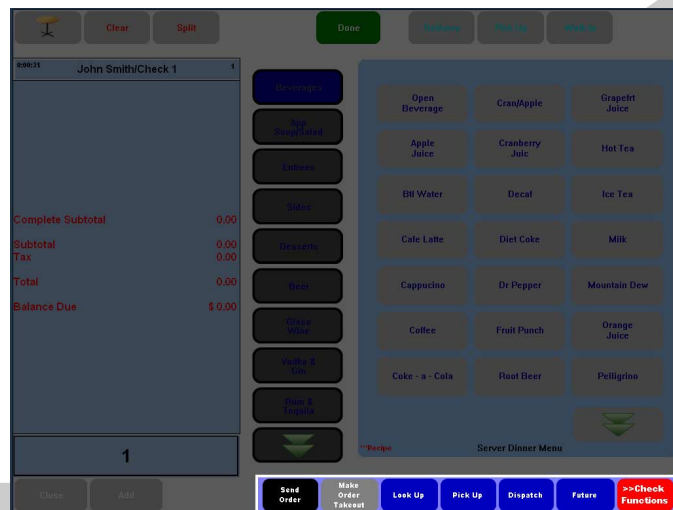
Figure 2 - 39 Order Screen Panel, Table Service

> If you are already using a custom order screen panel for check functions, you can add the new Aloha Takeout button, if there is room. In most cases you will need to create a new Order Screen panel containing ATO functions. Add a 'chain' button function to the existing POS check functions Order Screen panel that accesses a new custom Order Screen panel containing these ATO buttons. The ATO Order Screen panel should include a 'chain' button function to return to the POS check functions Order Screen panel upon demand.

Add buttons to this panel, as required, and make it a regular part of the order entry screen by creating an event that makes it an active component of the order screen each day using an Activation Schedule. Select **Maintenance > System Settings > Event Schedule**, and add 'Set Order Screen Panel by Job Code,' making the new order screen panel active for each job code related to Aloha Takeout. You will need to add one instance of this event for each job code that accesses ATO. Set an order panel containing buttons that a job code uses most throughout their shift.

These buttons, assembled into an Order Screen panel, might appear as shown in Figure 2 - 39, when displayed on the order entry screen.
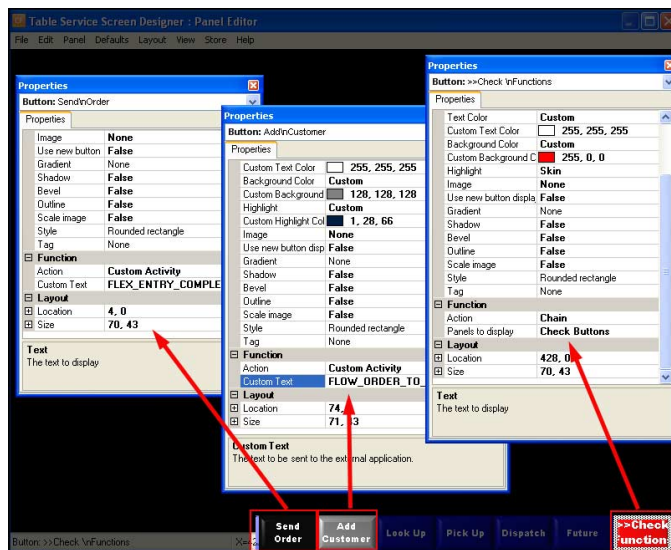
Figure 2 - 40 Table Service Panel Editor, Configuring Order Screen Panel

You can customize button width and text labels to make the buttons relate to your own operational needs. Create these buttons using the same Custom Activity strings discussed in "Establish Navigation Between the POS and Aloha Takeout" on page 2-41.

Using a Floor Plan to Access Aloha Takeout

We recommend using the Floor Plan feature for Table Service employees whose job codes also include Aloha Takeout functions. You can add buttons required for Aloha Takeout to an existing screen, or you can create a special panel and screen for required Aloha Takeout functions. If you create a new panel specific for Aloha Takeout, at least three buttons are recommended:

- **WWT** — Create a button that transitions directly to the working with tables screen, making it possible to begin the order entry process immediately. Button function = WWT.
- **Look Up** — Create a button that transitions directly to the Look Up screen, in Aloha Takeout, making it possible to begin the order by associating it with a specific customer. Button function = Custom Activity Interface: Information for external application = FLEX_ENTRY_COMPLETE.
- **Exit** — Create an Exit button for logging out of the FOH. Button function = Exit.

This process ensures support for a 'conversational ordering process,' making it easy to begin an order without interrupting a customer, regardless of how they begin a conversation. Whether a customer starts naming items they want to order, or if they start by giving their name or telephone number, you can quickly move to a screen that accepts this information and begin entering it.

> All employees may not require access to ATO screens. To limit access, clear the 'Show Takeout on login' job code option, and assign a floor plan and order screen panels that do not contain ATO navigation buttons.

You can create additional floor plan buttons using any of the other 'custom activity' and POS functions suggested in "Establish Navigation Between the POS and Aloha Takeout" on page 41 that you find useful.
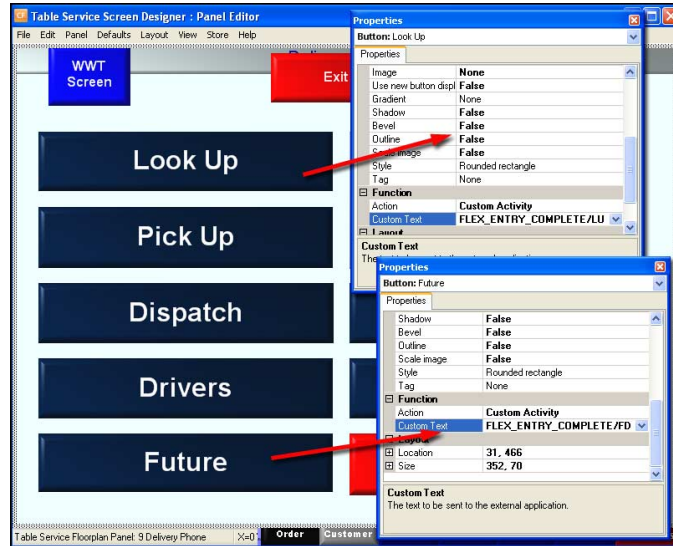
Figure 2 - 41 Table Service, Takeout order taker floor plan example

DRAFT

3 Configuring Aloha Takeout

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DRAFT

After laying the foundation in the Aloha POS, you can quickly configure Aloha Takeout to run and work with the Aloha POS.

Enabling **Use Takeout** in Installed Products ([See "Make Aloha Takeout Active" on page 2-4.](#)) displays an Aloha Takeout icon in the 'Product' panel at the top of the configuration management tool screen. Selecting this icon displays the Aloha Takeout related configuration tree under the **Maintenance** menu. This includes both Aloha Takeout and Aloha Takeout related POS maintenance menus.
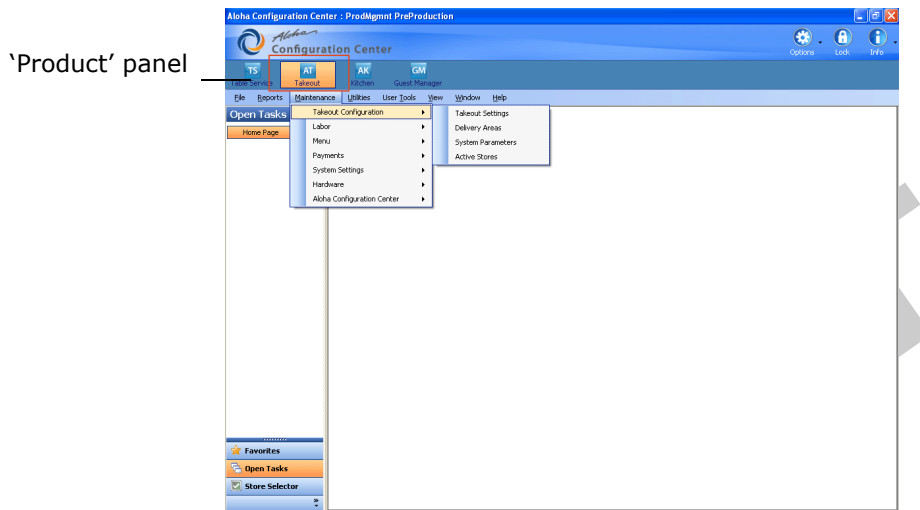
Figure 3 - 1 Configuration Management Tool, Aloha Takeout options

Some Aloha Takeout related options for terminals, job codes, and access levels are located in the same configuration menus as the POS. For example, the configuration of interface terminals is located in **Maintenance > Hardware > Terminals**, the same location used to configure an order entry terminal. Site information is read directly from the **Maintenance > Business > Store > Location Information** tab. These options were covered earlier in this document when configuring the POS.

Aloha Takeout-specific options are located in the Takeout Configuration maintenance tree. This includes **Takeout Settings**, **Delivery Areas**, **System Parameters**, and **Active Stores**.

- **Takeout Settings** — Aloha Takeout options that apply to the majority of sites. The CMT allows versions of the Takeout Settings. For example, if some sites offer delivery, the delivery options may be enabled and versioned for those specific stores. In most cases, the Takeout Settings apply to all stores in the enterprise.
- **Delivery Areas** — Defines the delivery area for the selected location. Delivery areas vary by site based on geographic and franchise limitations.
- **System Parameters** — Defines site specific network options required for Aloha Takeout to communicate. In most cases Aloha Takeout network options vary by site.
- **Active Stores** — Allows you to define which sites in the enterprise offer takeout or delivery operations. [See "Make Aloha Takeout Active" on page 2-4.](#).

The Aloha Takeout Reference Guide contains field descriptions and more in-depth information about configuration options available in Aloha Takeout.

Takeout Settings

In this section, we discuss the following topics:

Takeout

Configure the POS Type, Queue, and Petty Accounts

The Takeout tab contains site and POS integration information.

Figure 3 - 2 Takeout Settings, Takeout tab

> If the site information is not correct, update the information in **Maintenance > Business > Store > Store Settings > Location Information** tab, in Aloha Manager or Configuration Center, and allow the system to perform a data refresh.

POS Type

Select the POS Type you are using: Quick Service or Table Service. This selection activates specific program assumptions, based on the capabilities inherent in each product.

Takeout & Delivery Queue

Select the **Queue**, as configured in **Maintenance > System Settings > Order Entry Queue**, through which you intend to handle takeout and delivery orders. In Table Service, this must be the same queue selected in **Maintenance > Business > Store > Store Settings > Delivery** tab, in the 'Delivery order queue' drop-down list. See "Defining the Delivery Order Queue" on page 2-12.

Cash Accounts

The options available in this location define the accounts drivers use to obtain and turn in cash associated with deliveries.

Driver bank functions (cash distributed to drivers) provide cash for drivers to make change during the initial deliveries of their shift, if they need it. Driver 'banks' increase the cash liability for drivers, and decrease cash liability for the cashier.

Driver drop functions (cash received in the store from drivers) reduce the cash liability for drivers, and increase cash liability for the cashier accepting the drop. Driver drops are very important, as they help prevent theft or driver assault. Although the source of this cash is money received by drivers in payment for delivered orders, cash drops seldom bear a direct relationship to these orders.

These options interact with the Aloha POS system, and establish cash accountability based on the version of Aloha installed. If the site is using Aloha v6.7 or later, Aloha detects the cash drawer assignment of the logged in employee, usually the cashier, and uses this to provide the store-side cash accountability of the cash stream between drivers and the cash drawer. If the version of Aloha installed does not support cash drawer accountability, Aloha Takeout makes no attempt to determine cash drawer assignments, or to facilitate bidirectional-directional cash accountability.

Cash To Driver — Designates the Aloha POS petty cash account to which driver bank activities are attributed. Cash distributed to the driver increases driver cash accountability. This is typically used for the driver's starting bank.

Cash From Store — Specifies the Aloha POS petty cash account to which cash disbursements to drivers are attributed. For sites using Aloha v6.7 or later, Aloha Takeout detects if the logged in employee is assigned to the attached cash drawer. If Aloha detects no cash drawer assignment for the logged in employee, it prompts for an employee to log in who is assigned to the attached cash drawer. Driver bank events decrease cash accountability for the cashier.

Cash To Store — Designates the Aloha POS petty cash account through which driver drops return money to the store. Driver drops decrease driver cash accountability.

Cash From Driver — Specifies the Aloha POS petty cash account through which driver drops are received into the attached cash drawer. For sites using Aloha v6.7 or later, Aloha Takeout detects if the logged in employee is assigned to the attached cash drawer. If Aloha detects no cash drawer assignment for the logged in employee, it prompts for an employee to log in who is assigned to the attached cash drawer. Driver drops increase cash accountability for the cashier, independent of specific orders.

> ⚠️ CAUTION ***You must be using Aloha POS v6.7 or later for cash drawer detection.***

Order Modes

Several configuration options are available on the Order Modes tab that allow you to define order modes and receipt printers when items are ordered.
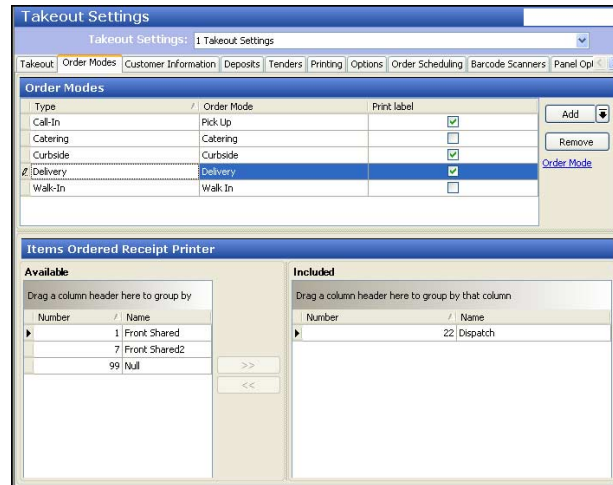
Figure 3 - 3 Takeout Settings, Order Modes tab

You will still need to configure which order modes appear on the Look Up screen in Panel Options. See "Determine which Order Modes appear on the Look Up screen, and the order in which the order mode buttons appear from top to bottom." on page 3-45.
Order modes used for Aloha Online, yet not displayed on the Look Up screen, should be configured here.

---

1. Click the **Add** drop-down and select an order **Type**.
2. Click the **Order Mode** drop-down and select the POS **Order Mode** from the drop-down list that appears.
3. Enable **Print Label** if you would like labels to print for the selected order type.
4. Select an **Items Ordered Receipt Printer** in the **Available** frame and click the **right arrow** to move to the **Included** frame to print a receipt at the selected printer. This is commonly used to print a guest check to the driver dispatch station when a delivery order is finalized.
5. Repeat **steps 1 through 4** for each order type suppported at your location.

6. Click **Save.**

> It is very important to assign one unique, different order mode to each supported order type on the list. Assigning two order types to the same order mode can result in multiple order fulfillment problems.

> If you are using Quick Service, and want the ability to convert takeout or delivery orders to dine-in orders, enable the 'Allow New Orders to be Converted...' option, on the User Interface tab, and then change the 'POS Order Mode' option from 'Not Used' to 'Dine In' These conversions take place on the Order Confirmation screen. This feature works only if the items have not yet been ordered; installations configured to order items upon display of the Order Confirmation screen cannot use this feature. This option is not available in Table Service installations.

Enter Customer Information

Defining customer name and phone number defaults simplifies adding new customers. These defaults appear in a new customer record the moment you begin creating it, and are editable, if any are incorrect for a specific customer. We recommend consulting with your marketing, operations, and training departments to find the right balance between order flow efficiency and customer data retention.

Figure 3 - 4 Takeout Settings, Customer Information tab

1. Enable or clear the **default values** to use in the **Customer Name** group box.

   a. Select **Populate New Customer First Name**, to assume the first string entered in the search bar is the first name of the customer, for new customer record creation.

   b. Select **Display Last Name First**, for a customer 'last name, first name' format to appear first in search results, order lists, and print on guest checks and kitchen chits.

   c. Select **Check for Duplicates** to query first name and last name against existing customers in the database for potential duplicate records, when touching Add Guest. If a duplicate exists, a dialog box appears informing you the customer may already exist, and asking if you want to create a new customer record anyway.

   d. Clear **Require Customer for Walk-In** to use an entered search string as a tab name. This does not associate a customer record with a walk-in order (even if a guest record is selected). Enabling this option requires you to search for a walk-in customer in the ATO database, which is often unnecessary and can cause guest issues and service delays in the counter ordering process. Unless you require marketing information for walk-in customers, we recommend clearing this option.

e. **Enable Express Customer Entry** to display a condensed version of the Add Guest dialog . The express customer entry dialog displays one address, one phone number, and limited other fields required to create a customer record and start an order. Additional customer information can be added at a later time by touching **Edit Guest** on any ATO screen.

f. Select **Require Customer Last Name**, to require the entry of a last name for each customer record. This helps maintain a viable marketing database.

g. Enable the **Aloha Loyalty ID for New Guests** to prompt for the customer's loyalty ID when adding a new customer to the database. This can be bypassed with the **Override Require eFrequency Member ID for new guests** access level. Aloha Takeout automatically performs an Aloha Loyalty assignment for customers associated with an Aloha Loyalty ID *Recommended Configuration:* Enable for Aloha Loyalty sites.

h. Enable the **Prompt for Customer Address When Customer has Multiple Addresses** for the select address dialog to appear when starting a new order for a customer that has both a home and an office address. If this option is cleared, ATO uses the **Default Address Type** to associate the address with the order. Touch **Select Contact** on the Pick Up or Dispatch screen to change to a secondary address or enter a one-time address.

2. Select the **Default Address Type**, from the drop-down, based on the residential or business trade area of your location This sets the address type, when adding new customers to the database. You can manually change the address type by touching **Home** or **Office** on the express customer entry screen.

3. Enter the **Default City**, **Default State**, and **Default Zip Code** fields. This populates the city, state, and zip, if delivery area functionality is not used, or the delivery area is not configured with city, state, and zip information.

a. If the city, state, and zip are defined in the delivery area, ATO uses the delivery area information over the defaults.

4. Click **Save**.

Enable House Accounts

Aloha Takeout supports 'house account' functionality used to charge customer activity against an account for later billing. The system considers house accounts an attribute of the customer profile.

You can associate house accounts with existing customers. Selecting Guest Details, then the House Account tab, allows you to search and associate the house account with the customer. An optional Prompt for **PO Number** (purchase order) configuration displays a dialog to enter a customer specific PO number to allow order tracking by the customer. The PO number is printed on the invoice.

You can tender customer orders associated with house accounts to the defined house account tender by touching 'Apply Payment' or through the configuration of auto-applying payments. Aloha Takeout provides a robust invoice to present to the customer. House account activity is tracked within the POS for later billing. The POS allows you to view and print house account statements; after which, you can "balance" the house account, to begin tracking activity for the next billing cycle.

Enable House Accounts — Enables the support of 'house account' functionality used for charging customer activity against an account for later billing.

You can configure house accounts in two ways:

1. Select **Enable Aloha Integration**, to associate Aloha Takeout customers with POS house accounts. House accounts created in the CMT are available to associate with Aloha Takeout customers following a Aloha Takeout EOD or by manually restarting the "Aloha Takeout and Delivery" Windows service. Use the POS to:

   • Edit house account information in **Maintenance > Payments > House Accounts**.
   • Track house account charges in **Report > House Account**.
   • Print statements in **Report > House Account**.

- Balance accounts in **Report > House Account**.
- Manually add payment, credit and debit transactions in **Functions > Post to House Account**.

2. Clear **Enable Aloha Integration**, to associate house accounts with an external import process. This feature requires integration with an above store accounting package, like Great Plains, to edit (post, adjust, and bill) all house account activity, and requires you to find an expert to provide data export and import routines. Integration to Aloha Insight is also a requirement to provide the distribution of the house account import file. Contact your NCR representative for help enabling and configuring this feature.

3. Enable **Prompt for PO Number** to allow the entry of a customer-specific purchase order number generated by their own accounting department they would like associated with an order. PO Numbers print on house account invoices and are stored in the Aloha Takeout database with the order. Aloha Takeout also creates an internal "Invoice Number" for tracking, in addition to the PO Number.

Steps at a glance:

1. Create the **POS house account tender**. <u>See "Create Tenders" on page 2-31.</u>
2. Select **Enable Aloha integration** for POS house accounts.
3. Create **house accounts** in the POS as normal, and run a data refresh. <u>See "Create House Accounts" on page 2-30.</u>
4. Restart the **Radiant Takeout and Delivery service**, to import new and updated house account information.
5. Assign **house accounts** to customers in ATO.
6. Start **orders as house account** or convert to **house account orders**.
7. Touch **Apply Payment**, to apply the house account tender through ATO.
8. Use the **Post to House Account** function on the BOH, to apply payments, credits, and debits.
9. Run **house account reports** on the BOH.
10. Use the T**akeout Invoice Viewer utility**, to recall and reprint previous invoices and attach to the house account reports (statements).
11. Send **statements** to customers.
12. Apply **payments**, when received, on the BOH.
13. Monthly, use the **Balance function** to consolidate the account and show new transactions moving forward.

⚠️ **CAUTION** Aloha Takeout overwrites any existing house accounts, when importing POS house accounts.

Customer Purge

Select **Enable Purge of Inactive Customers**, in the 'Customer Purge' group box, if you want Aloha Takeout to remove customers from your database when they have not ordered in the number of days you specify with the **Max Days of Inactivity** option. You can specify a maximum of 65,535 days. Sites with a large apartment dwelling trade area could set this to 180 to 360 days to account for six month and yearly lease resident turn over. Maintaining a clean customer database helps with search response times and valid marketing information.

Deposits

The options available on this tab enable the deposits feature, and help you to specify how Aloha Take-out and the Aloha POS interact to make use of it. Deposits are used to prepay part or all of a future order to cover labor and food costs in the event the order is abandoned by a customer. Multiple deposits may be added to a future order until it is released.
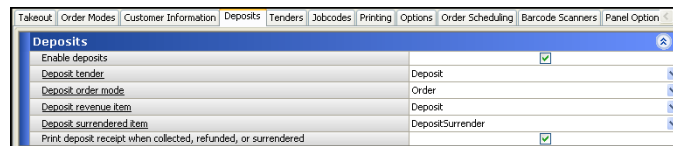
Figure 3 - 5 Takeout Settings, Deposits Tab

To configure deposits:

Configure the following options based on the POS tender, order mode, and item configuration per-formed earlier.

1. Select Enable deposits to enable the deposit feature and have other deposit configuration option appear.
2. Select the **Deposit tender** from the drop-down to specify the tender you specifically created for use with deposits received against future orders. See "Deposit Tender" on page 2-32.
3. Select the **Deposit order mode** to specify the order mode to which you want to attribute deposits received against future orders.

> Do not configure a service charge for the deposit order mode. Aloha Takeout cannot fully ten-der the deposit if you configure a service charge.

> As a best practice, we recommend a separate, non-Aloha Takeout order mode, with no sur-charges configured. Apply taxes to deposits in accordance with local tax regulations.

4. Select the **Deposit revenue item** used to specify the open revenue that is added to the check in the amount of a deposit. A deposit does not affect sales amounts for a day. This allows you to tender against this item with a deposit paid by customers. See "Deposit Item" on page 2-34.
5. Select the Deposit surrender item used to specify the open item that is added to check in the amount of a forfeited deposit. A deposit surrender appears as sales and is tendered by the deposit tender in the amount of the surrender. See "Deposit Surrender Item" on page 2-35.

6. Enable Print deposit receipts when collected, refunded, or surrendered to print a guest check any time you complete an activity related to deposits.

Figure 3 - 6 Example, Printed Deposit Receipt

Receipts for other transactions related to deposits appear very much the same as this one. The information included on these receipts varies, depending upon the type of payment, the type of customer, and more.

Tenders

The Aloha Tenders tab gives you the ability to specify the Aloha POS tenders which interact with Aloha Takeout. Aloha Takeout uses Aloha POS Tenders to:

- Close checks within the Aloha Takeout user interface or through an interface terminal.
- Close checks to the defined cash tender upon driver return.
- Determine tenders that may be used to apply to future order deposits.
- Define tipped credit card tenders
- Apply payments to house account orders.

Adding tenders on this tab provides the linkage between Aloha Takeout and the POS reporting structure.

Figure 3 - 7 Takeout Settings, Tenders tab

To add an Aloha tender to the tender list:

1. Click the **Add** drop-down.
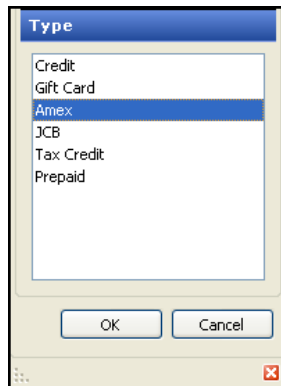
Figure 3 - 8 Dialog Box, Select a Tender to Add

2. Select an **Aloha Takeout tender type** from the drop-down list. Configure the following tenders depending on your operation. See "Create Tenders" on page 2-31 for POS tender configuration.

- **Cash** — Used for **Close Checks On Driver Return**.
- **Credit** — We recommend pointing the credit tenders to the tipped credit card tender IDs in delivery operations.
- **House Account** — Defines the tender used to apply payment to house account orders.

- **Deposits** — Required for deposit functionality to work when applying deposits to released future orders.
- **Prepaid** — Used with delivery services to add the payment when entering the order to quickly close out.

3. Select a **POS tender** from the drop-down list in the Tender ID column.
4. Mark the new tender as **Available for Deposits**, for the selected tender button to appear on the deposits screen.
5. Type the **default tender button text** to appear on the deposit screen in 'Description.'
6. Repeat **this procedure** as many times as necessary to add all the tenders you need to support accepting deposits or closing checks while using a function in Aloha Takeout.
7. Click **Save** at the bottom of the Aloha Tenders tab.

> If you are accepting deposits for future day orders, remember to add the tender you created, to apply deposits, to the list of tenders on the Tenders tab. Refer to the Aloha Takeout Reference Guide for more information about the Deposits feature.

Printing

Aloha Takeout follows POS terminal and print group routing. Use the **Maintenance > Hardware > Terminals > Default Printer** and **Voucher Printer** options to define where interface terminals print these artifacts. Aloha Takeout uses printer intercept functionality to add a 'header' to guest checks and kitchen chits, containing customer and order information. Depending on the order mode and options selected on the Printing tab, varying information prints.

Select the default values you want to use for guest checks, driver itineraries, and kitchen chits. Examples of kitchen chits for walk-in and call-in orders, showing the type of information contained in each, appear below:
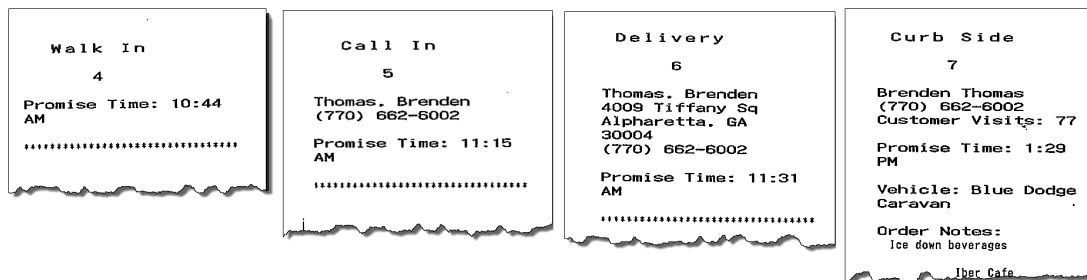
Figure 3 - 9 Examples, ATO headers for kitchen chits

Aloha headers contain the following information by order type:

- **Walk In orders:** Sequence number if enabled or just the "Walk In" header.
- **Call In orders:** Customer name and contact phone number.
- **Delivery orders:** Customer name, contact phone number, and contact address.
- **Curbside orders:** Customer name, contact phone number, vehicle information.

Aloha Takeout also prints certain artifacts outside of the POS. These include:

- **Driver Itinerary:** Contains customer, order, payment, and route information for drivers. The driver itinerary can be configured to print grocery items.

- **Bag Chit:** Contains future order customer and order summary information. This can be used as a record for the customer or the store. Bag chits do not contain pricing information.
- **Future Order Statement:** Contains future order customer and order summary information, including item prices. The future order statement may also be printed for current orders.

Use caution with future order statements. Since they include prices, future order statements can be presented as guest checks for payments and are a possible theft opportunity.

Options available, on this tab, control the printing of certain information for the benefit of drivers, other store employees, and the customer. Use these options to enhance communication among employees within the store and between the store and customers.

There are three 'Notes' types used within Aloha Takeout that are controlled by various print options. As a general rule, employees should be trained to enter helpful operational information, and not information that would offend a customer. Printing options are designed to separate store-facing operational information from customer-facing, however, there is always the opportunity the customer will mistakenly receive the wrong printed artifact.

- **Guest Notes** — are stored in the guest profile. Guest notes are intended to be store facing information to help service customer needs. Examples would be allergy information or a request to be addressed on each of the specific customers orders. Guest notes do not print on the guest receipt by design and there is no option to change this behavior.

- **Order Notes** — are stored on an order-by-order basis. They exist for the life of the order and are then purged. Order notes are requests outside of the normal item and modifier entry. "Use blue table cloths", "Ice down drinks", and "Package in separate bags" are examples of instructions specific to the order.
- **Address Notes** — help delivery personnel get the order to the desired location. Cross streets, "yellow house", "red 2-story brick", and gate codes are examples of address notes that help the driver find the delivery location. Address notes print on labels and the driver itinerary by default.

Figure 3 - 10 Aloha Takeout, Printing Tab

⚠ **CAUTION**

Use caution when enabling any notes printing. There is always the possibility a guest will recieve a printed artifact with guest, order, or address notes. Train your staff not to enter derogetory information in any notes field.

To configure printing options:

1. Enable **Print Order Notes on Guest Checks** if you use the guest check when assembling the order or would like to keep guests informed of the order notes added to an order.
2. Enable **Print Order Notes on Driver Itinerary** if drivers use the itinerary to confirm order information. Clear this option to save paper and the length of the driver itinerary.
3. Enable **Print Promise Time on Guest Check** to print the promise time associated with an order in the ATO header section of the guest check.
4. Enable **Print Address Notes on Guest Check** if drivers use a guest check as reference when delivering orders. Clear this option if drivers use the driver itinerary or other artifact with address note information.
5. Enable **Print Address Notes on Kitchen Chit** if drivers use a kitchen chit as reference when delivering orders. Clear this option if drivers use the driver itinerary or other artifact with address note information.
6. Enable **Print Order History Count on Itinerary and Receipt** to print the number of orders on record for a customer on the guest check and delivery itinerary. This printed value helps customers to know how close they are to winning loyalty prizes, such as drinks or tee-shirts, by looking at their receipts. It also helps drivers to remember to include these items, as they assemble delivery orders.

7. Select the **Print Order Items Receipt Count** from the drop-down to specify the number of guest checks to print when orders are finalized and sent to the kitchen. The guest check prints to the Default Printer defined on the local interface terminal in **Maintenance > Hardware > Terminals**. *Recommended Configuration:* Set to zero (0) unless using the guest receipt at the takeout station for tracking and assembly of orders.

8. Select the **Apply Payment Receipt Count** from the drop-down to define the number of guest checks to print when a payment is applied to a check through Aloha Takeout. This is in addition to the number of receipts configured to print by the POS. Enable this if your operation primarily provides counter service that does not print guest checks, however receipts need to be printed for ATO orders.

9. Type the **Promise Time Label** to print in the ATO header on guest checks, kitchen chits, and other ATO controlled print jobs, describing the promise time. Do not include a colon in the character string. ATO automatically adds a colon. Limit the number of characters to 12 if possible to avoid line wrapping.

10. Type the **Promise Date Label** to print in the ATO header on guest checks, kitchen chits, and other ATO controlled print jobs, describing the promise date. Do not included the colon in the character string. ATO automatically adds the colon. Limit the number of characters to 12 if possible to avoid line wrapping.

11. Type the **Add-On Chit Header Label** to print in the ATO header on kitchen chits. This feature is activated when a customer calls back and adds items to an order already in the kitchen. Aloha Takeout prints the 'Add On' text in the takeout header on the kitchen chit. The default is "Add On".

12. Enable **Print chit header at bottom of chit** to print the ATO header at the bottom of the chit, instead of the top. This makes it more visible in certain configurations and usages, such as when stapling a chit to the top of a paper bag or hanging on the kitchen wheel.

13. Enable Print guest notes on kitchen chit if the kitchen should be aware of guest notes on an ATO order. This makes guest note information available during food preparation.

14. Enable **Print chit on final bump** to print a 'bag chit' when the last item on the order is bumped from Aloha Kitchen and KPS. The bag chit can be used for final assembly of the order and possible stapled to the bag. This option requires Aloha Kitchen or Aloha KPS be installed in order to work.

15. Enable **Print changed chit when order cancelled or mode changed** to alert the kitchen staff when an orders taker adjusts an existing order. ATO prints a chit to the kitchen with updated information allowing the kitchen staff to address the changes.

16. Enable **Include unavailable items on kitchen chit** to print items that could not be released in the ATO header 'Unavailable Items' section on a kitchen chit. This occurs when a manager has made an item unavailable in item availability between when an order was accepted and when it is released. This applies to future and online orders when there is a lag between order and release. This allows you to address item or modifier shortages before a customer arrives to pick up an order. *Recommended Configuration:* Enabled.

17. Select the **Unavailable item indicator**, from the drop-down, to print the selected item, defined in Maintenance > Menu > Items, on the kitchen chit to indicate missing items. This is very helpful when there is only one item on the check that cannot be released. See "Unavailable Item Indicator" on page 2-36.

18. Select **Enable future order statement** to add the Print Statement button on the Order Details screen. The future order statement prints a summary of the order with prices. *Recommended Configuration:* Cleared. This is an opportunity for theft if presented as a guest receipt and cash is taken for it. *Related options:* The Print Future Order Statement 'Action' must also be added in Takeout Settings > Panel Options > Order Details for this feature to work when enabled.

19. Click **Save**.

Label Printing

Aloha Takeout has the ability to print item labels to attach to takeout packaging. Aloha Takeout labels include customer, item, order, total, and payment information. Labels make it easy to identify the packaging contents without opening the box and letting heat in or out. Labels also help drivers pull the correct items from the delivery bag to give each customer their entire order.

Labels are printed by order mode and category. See and for additional label printing configuration.

Figure 3 - 11 Aloha Takeout Labels, Bixolon (Left) and Zebra (Right)
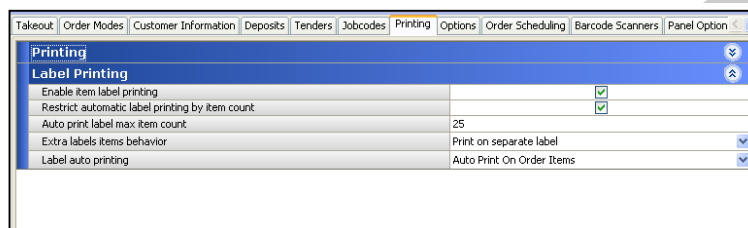

Figure 3 - 12 Printing, Label Printing

To enable configure label printing:

1. Select **Enable item label printing** to activate the label printing feature. Enabling this option activates the following label printing options that define the contents of the labels and when they print.

2. Enable **Restrict automatic label printing by item count** to disable label printing when an order contains a large number of items from the label print category. This option reduces wasting labels on orders with a large number of the same item. Touch 'Reprint Label' to print labels for the entire order. Individual item labels cannot be selected to reprint at this time.

    • Type the Auto print label max item count number to define the max number of items for auto print. Label item counts above this setting do not print labels. ***Recommended:*** 20

3. Select the **Extra Label Items Behavior**, from the drop-down, to define how ATO prints items in orders that belong to categories normally excluded from printing, on labels. Examples on extra items are canned and bottled drinks. Select one of the following options from the drop-down list:

    • Select **Do not print** to prevent non-label category items from printing on labels.
    • Select **Print on first label** to print non-label category items only on the first label.
    • Select **Print on all labels** to print non-label category items on each label.
    • Select **Print On separate label** to print a separate label containing all the non-label category items.

4. Select one of the **Label auto printing** behavior options, from the drop-down list, to define when the labels print.

    • Select **No Auto Printing** to require employees to touch 'Reprint Label' to print labels manually.
    • Select **Auto Print On Order Items** to print items when an order is sent to the kitchen for preparation. ***Recommended Configuration.***
    • Select **Auto Print On Order Bump Prints** to automatically print labels for the entire order, when the last item on an order is bumped from Aloha Kitchen or Aloha KPS.

- Select **Auto Print On Order Entry Complete** prints labels automatically when a button that includes the ORDER_ENTRY_COMPLETE Custom Activity action is touched.

'AutoPrintOnOrderBump' is supported only in Quick Service, and only in versions 6.4.13 or later.

Label Auto Printing options enable ATO to print labels the first time the order is sent, bumped or complete. If items are added to the order, touch **Reprint Labels** to print labels for all 'label items' on the check.

Label Printers

Labels are printed at special label printers, supported by Aloha Takeout. One or more label printers may be defined to print labels at designated stations. Aloha Takeout label printers are defined in **Maintenance > Hardware > Printers**, the same location used to define POS receipt and kitchen printers.
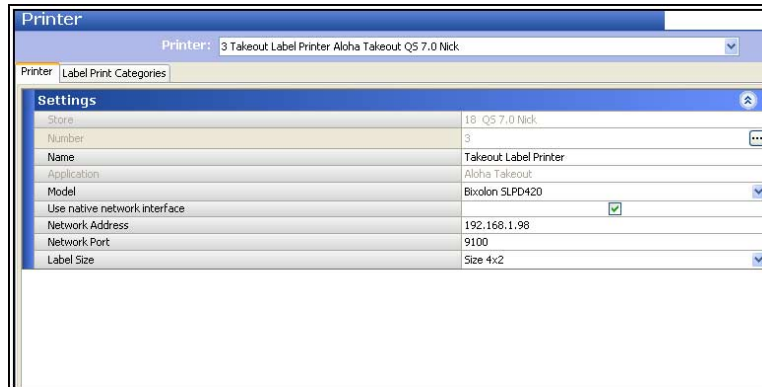

Figure 3 - 13 Maintenance, Hardware, Takeout Printer

The Bixolon SLP-D420 label printer requires Ethernet configuration and connection. The Datamax and Zebra label printers connect to a serial port on the defined terminal.

To create a label printer:

1. Click the **New** drop-down and select 'Aloha Takeout' from the list, then click **OK**.
   - If using CFC, select the store in which to add the printer.
2. Enter a Name that logically represents a label printer, based on the printers location or function. "Expo", "Salad", or "Pizza" are examples of printer names.
3. Select the label printer **Model** from the drop-down.

   - The **Bixolon SLPD420** is an Ethernet label printer connected to a port on the Aloha switch. (Radiant part number — **PR10296)**
   - The **Zebra LP2844** is a serial label printer connected to a COM port on an Aloha Takeout terminal. This printer must be sourced outside of NCR.
   - The **Datamax E4203** is supported for legacy installs only. This printer is no longer sold with Aloha Takeout through NCR.
4. Enable **Use native network interface** if using the Bixolon SLPD420 Ethernet printer.
   a. Type nthe **Network Address** defining the IP address set on the Bixolon printer.
   b. Type the **Network Port** if the default 9100 port number is blocked and another port is suggested by your IT department.

   — OR —

   Clear **Use native network interface** to configure the serial Zebra LP2844.

   a. Select the **Terminal,** to which the Zebra LP2844 is connected, from the drop-down list.
   b. Select the COM **Port,** to which the label printer is connected, from the drop-down list.
5. Select the Label Size to define the size and orientation of the label. Label roll stock should match the selected label size.

   - Select **Size4x2** from the drop-down, to print labels in landscape orientation. ***Recommended for pizza operations.***
   - Select **Size2x4**, from the drop-down, to print labels in portrait orientation. Supported on the Datamax and Zebra only. ***Recommended for sandwich operations.***

Label Printing Categories

Use the **arrow** buttons to move the selected category from the 'Available' frame to the 'Included' frame.
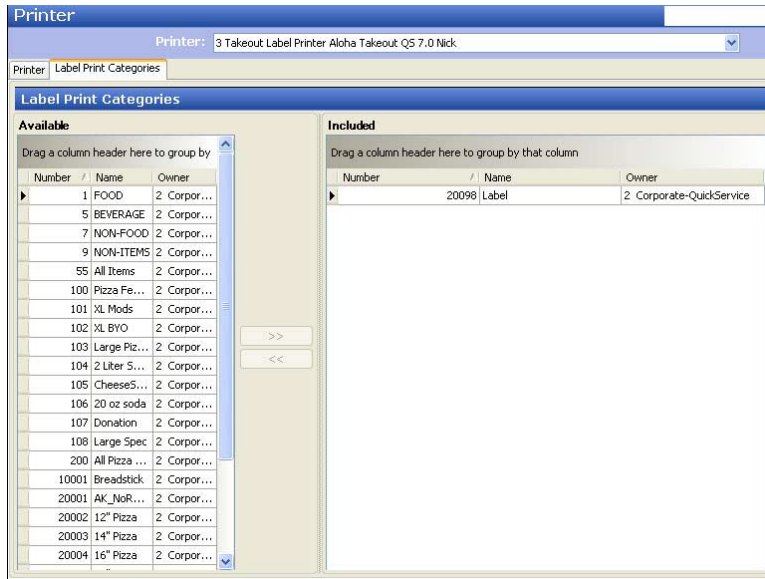

Figure 3 - 14 Maintenance, Hardware, Printer, Takeout Printer Label Print Categories

Configuring Label Printer Hardware for Aloha Takeout

Aloha Takeout supports Bixolon and Zebra label printers. After configuring the Aloha system and Aloha Takeout for label printing, it is important to configure each type of printer properly, to print labels correctly without risking wasted labels because of misprints. This configuration involves using the buttons on the printers to advance to, change, and save configuration settings. Current and updated configuraiton options typically print to a label for validation.

Configuring Bixolon Label Printers

Support is added for the Bixolon SLP-D420 label printer. This printer is sold by NCR. The Bixolon SLP-D420 is an Ethernet printer and driven by the Takeout service and will work as long as a master ATO terminal is still communicating on the network. This eliminates the reliance on a specific terminal to drive a label printer.

Bixolon SLP-420 Radiant Part Number: **PR10296:**

Figure 3 - 15 Bixolon SLP-D420

 CAUTION *A serial version of the Bixolon SLP-D420 is available. The serial version is not supported through Aloha Takeout.*

NCR installs the latest firmware and fonts on the printer, provided the correct solution set (RSS#500531) is specified on the order. However, there are site and label stock site specific settings that need to be applied at the store. The Bixolon "Ethernet Configure Setup V5.00" and "Unified Label Utility (V1.4.2).exe" utilities are available on Aloha Update for download in the **Download Installation CD > Aloha Takeout > Utilities** area. Newer versions will be posted as they become available.

To auto-calibrate printer:

Must be done initially, and anytime label size is changed. If gap size on label stock changes this may also become necessary.

1. Load label stock in printer and turn off printer.
2. With lid open, hold down "Feed/Cancel" button and turn on printer.
3. Green LEDs on lid will alternate.
4. Close printer and message will print.
5. Press "Feed/Cancel" three times.
6. Printer will spool off several labels continuously to auto-calibrate and set its label length.
7. Press "Feed/Cancel" to test. Label stock should advance exactly one label and cut off at the gap. Without the auto-cutter, the label gap/perforation should be aligned with the printer's teeth. See "Adjusting gap alignment" below if printer teeth or cutter do not align properly.

Must set IP Address, etc.

1. Turn on printer and attach to Ethernet (disconnect USB). May want to power cycle if transition-ing.
2. Run "Ethernet Configure Setup V5.00" installed from the Bixolon Installation CD. Should be in Start->Program Files->BIXOLON->Configure or at "C:Program Files\BIXOLON\Ethernet Config-ure Setup V5.00\Configure.exe"
3. Press "Search" icon/button. Printer MAC address should appear in "Board list" on left side.
4. Select the MAC address and change IP Address, Subnet Mask and Network port to something that is compatible with your LAN topology
5. Press "Setting" to send the new settings to your printer. "Complete setting the board" will appear if successful.
6. Set up Bixolon printer in ATO configuration with the matching IP Address and port number and a terminal of "BOH Server".

Adjusting gap alignment:

1. Connect printer to PC via USB and turn on
2. Run "Unified Label Utility (V1.4.2).exe"
3. Select "USB" from Interface Type and press connect. "Success Open Port" should appear.
4. Click the "User Setting Manager" button.
5. Go to the "Print&Page" tab of the resulting dialog.
6. Next to "Tear-off/Cutting" press the "Get" button.
7. Modify the value (typical range is +20 to -20) in dots per inch (dpi) (203 dpi = 1 inch)
8. Press "Set" next to "Tear-off/Cutting" to send the value to the printer
9. Press "Feed" on the printer and observe/test the teeth/cutter alignment
10. Repeat Get/Modify/Set/Test steps until alignment is satisfactory.
11. Close dialog and exit utility when done.

Configuring Zebra Label Printers

You *must* set the Zebra printer to page mode for it to work with Aloha Takeout. Before using the Zebra label printer, print the printer settings to determine its current state. If the Zebra printer is not in page mode, follow the procedure below to change it.

To check the mode on a Zebra label printer:

1. Turn the **Zebra Printer** off.

2. Hold down the **green button** located on the top of the printer.

Figure 3 - 16 Zebra LP2844

3. Turn on the **Zebra Printer**.
4. Immediately release the **green button**. The mode prints on the first label.
5. Press the **green button** to exit.

To change to page mode, use the following procedure:

1. Turn off the **Zebra Printer**.
2. Hold down the **green button** located on the top of the printer.
3. Turn on the **Zebra Printer**.
4. Hold down the **green button** until the outside of the button blinks **red**.
5. Release the **green button**.
6. Wait for the outside of **green button** to blink **green**.
7. Hold down the **green button** until the outside turns **amber**.
8. Release the **green button.**

Options

You must make several decisions about how you want your takeout or delivery business to work, and make configuration changes to support them, to round out the configuration for your sites. Options that support these decisions are available on the Options tab.
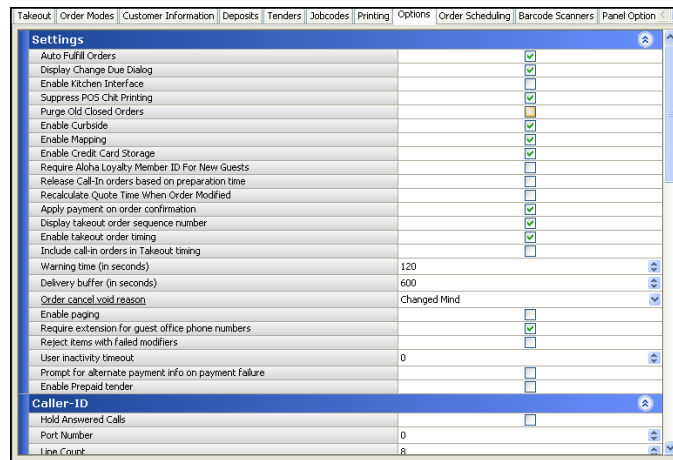

Figure 3 - 17 Takeout Settings, Options, Settings

Settings

Numerous options of a general nature, which define how your takeout or delivery business functions, are located in the Settings section.

To configure general options that affect how your sites function:

- Select **Auto Fulfill Orders** to automatically move walk in and pick up orders to the Closed Orders filter, when they are closed in the POS. If not enabled, you must touch 'Picked Up' to manually 'bump' orders off the Open Orders filter. *Recommended Configuration:* Enabled.

> Even if **Auto Fulfill Orders** is enabled, '**Picked Up**' still appears on the Pick Up screen in certain circumstances. Checks with payments applied on the Order Confirmation screen are tendered but remain open in Aloha Takeout until the customer arrives to pick up their order. At this point, the employee touches **Picked Up** to close the order, moving it to the Closed Orders list. Unless your operation warrants an extra step to finalize the closed order, we recommend **Auto Fulfill Orders** is enabled.

- Enable the **Display Change Due Dialog** option to cause a 'Change Due' dialog to appear in Aloha Takeout, when transitioning from the Aloha system back to Aloha Takeout after tendering and closing a check. *Recommended Configuration:* Enabled.
- Clear the **Purge Old Closed Orders** option. ATO is capable of displaying the full days closed orders without impacting performance.
- Select **Enable Curbside** to enable a drive-up environment where the orders are brought directly to the customers car. Enabling this option causes a vehicle information prompt to appear when starting a curbside order. Vehicle information is stored with customer profile and appears on the Pick Up screen to help curbside attendants match orders to cars as they pull in. Only one vehicle can currently be stored per ATO customer. *Recommended Configuration:* Optional.

- Select **Enable Mapping** to enable a map retrieval program, for establishing the maximum efficient routes for each delivery run. ***Recommended Configuration:*** Enable, if the mapping program is purchased from NCR Corporation, installed, and functional. The Radiant Takeout and Delivery service will not start if Mapping is enabled and the service is unable to communicate with the installed mapping application.
- Select **Enable Credit Card Storage** to allow Aloha Takeout to store customer credit card information along with customer records. The program stores this information in an encrypted form, allowing only the last four digits of the card number and its expiration date to display. The site key must be set in the Data Protection Tool in order for this option to work. See "Aloha Data Protection Tool" on page 5-9.
- Enable **Prompt for alternate payment info on payment failure** causes a dialog to appear if a tender is declined when entered on the confirmation screen or after touching 'Apply Payment.' This allows you to request updated payment information or store the order until valid payment information is entered. Items are not ordered until the payment is approved or the declined payment is removed.
- Select **Apply payment on order confirmation** to cause Aloha Takeout to retrieve stored payment card information, and to request authorization when the employee touches OK on the Order Confirmation screen.
- Enable **Close checks on apply payment** if you are only using Aloha Takeout for online orders and would like to automatically apply the payment entered online and close the checks when released.
- Enable **Recalculate Quote Time When Order Modified** to update an orders quote time when it is recalled and items are added or removed from the order. Depending on the changes, it may or may not affect the quote time. ***Recommended Configuration:*** Determine if the majority of order modifications add drinks or add items that require additional time to cook and prepare.
- Enable **Display takeout order sequence number** to print a simple incrementing number within the Aloha Takeout header section of kitchen chits and guest checks. Use the sequence number to prepare, assemble, and track orders through the takeout and deliver process. ***Recommended Configuration:*** Enabled. ***Related options:*** Add the Sequence Number Column to the Pickup screen when enabling this feature.

Order Timing

Order Timing alerts employees when orders are nearing, at, or past the promise time quoted to the customer. Orders turn yellow within the warning period. Orders turn red when the order is at or past its promise time. This allows employees to prioritize these orders and meet service level standards.

To establish order timing alerts:

- Select **Enable takeout order timing** to change the color of orders on the ATO screens based on the following settings. ***Recommended Configuration:*** Enabled.

  - Select **Include call-in orders in Takeout timing** to take call-in orders into consideration as part of the order timing alerts. When enabled, order timing alerts display on the Pick Up screen. ***Recommended Configuration:*** Cleared. In most cases, the site does not control when the customer arrives to pick up the order.
  - Type or select a **number** in **Warning time (Seconds)** to establish the number of seconds in advance of the promise time and the delivery buffer, an order displays in yellow, on the ATO screens. This change in color indicates the order is not yet late, but requires attention soon. ***Recommended Configuration:*** Enabled. Begin with 120 seconds (2 minutes) and adjust as required if this does not provide enough warning time or is too much.
  - Type or select a **number** in **Delivery buffer (Seconds)** to account for the time to drive an order from the store to a customer. If an order is not dispatched by the defined Delivery buffer prior to an order's promise time, the order turns red. Large or congested delivery areas require a longer delivery buffer than smaller, lighter traffic areas. ***Recommended Configuration:*** Enabled. Start with 600 seconds (10 minutes) and adjust as needed based on operational feedback. Also consider multi-stop runs when determining the delivery buffer.

Additional Settings options:

- Select a void reason from the **Order cancel void reason** drop-down list. Aloha Takeout uses this void reason for released orders cancelled by the customers. Touching 'Cancel Check' on the Order Details screen provides a one-step process to cancel the order, void the items, and remove from the order from the Pick Up or Dispatch screen. See "Create a Void Reason for Future Orders and Order Cancellations" on page 2-29. **Recommended Configuration:** Select the Order Cancel Void Reason defined earlier in the POS configuration section.

> When an order is canceled or the order mode is changed, a canceled order chit prints to the Items Order Receipt printer. See page 3-6. The purpose is to alert drivers of these changes and to reduce order taker trips to the driver station.

- Select **Enable Paging** to activate the paging feature. Aloha Takeout does not provide a paging interface to a paging system.
  - Clear **Enable Pager Prompt for Walk-In** unless your operation uses pagers to notify walk in customers when their order is ready. This option also requires **Enable Paging** is enabled on the Takeout Settings > Options tab for the paging functionality to work. Aloha Takeout does not provide a paging interface. This options prompts the order taker for a pager number when starting a new walk in order. The pager number is stored with the order and displayed in the pager column on the Pick Up screen. The Pager Column needs to be activated in Takeout Settings > Panel Options by clicking Add and selecting 'Pager Column'. Employees reference the pager number and enter the pager number on the separate paging console to notify the guest when their order is ready.
- Enable **Reject items with failed modifiers** to prevent releasing the parent item when a modifier is set "unavailable" in item availability. This feature affects future and online orders when releasing items to the POS. For example, if chicken was used to modify a fajita item, yet chicken is set as unavailable, the fajita item will not release and follow the Aloha Takeout 'unavailable item' functionality when enabled. Enable this option depending on the impact of modifiers on the parent item and the kitchens ability to prepare the item if the modifier is missing. In most cases we recommend enabling this option. See "Create Items" on page 2-34.
- Establish a **User inactivity timeout** to automatically log out Aloha Takeout terminals when no-one is actively using them. The POS FOH timeout is suspended when Aloha Takeout is the active 'window' on the terminal. This option continues security when the POS is not actively controlling the FOH timeout. **Recommended Configuration:** Enabled, set to a number of seconds high enough to not interfere with business. Phone customers may take additional time to decide on the items to order. Touching the screen in Aloha Takeout resets the inactivity timer.
- Select **Enable Prepaid tender** to add a 'prepaid' button on the confirmation screen. The prepaid tender is configured in Aloha tender maintenance and mapped in Aloha Takeout configuration as defined earlier in this document. See "Create Tenders" on page 2-31. The prepaid tender is used to quickly tender orders sent and delivered by a delivery service for later reconciliation. Orders paid with the prepaid tender do not Auto Fulfill if enabled. You must close these order by touching 'Picked Up' button on the Pick Up screen. **Recommended Configuration:** Cleared unless using a delivery service with this functionality. This option has the potential for theft or misuse. Implement an audit process if this option is enabled.
- Click **Save**.

Caller ID

Aloha Takeout has the ability to synchronize with caller ID devices. The Look Up screen displays ringing lines and caller ID information when enabled and connected.

Attach the device to the BOH file server running the Aloha Takeout and Delivery Windows service (*not to any of the POS terminals*). Once configured, Caller ID buttons for incoming calls appear on the Look Up screen, one button for each active line. When you touch a caller ID button, Aloha Takeout populates

the phone number in the search bar, and uses the telephone number to perform a search for a customer record containing the number. Touch the corresponding line of the phone and answer to confirm the customer and begin the order.

Figure 3 - 18 Look Up screen with Caller ID enabled.

Aloha Takeout supports Caller ID equipment from two companies. Rochelle and CallerID each offer two models that interface well with Aloha Takeout, as follows:

CallerID.com — www.callerid.com (Norcross, GA)

- **Whozz Calling? 2, 4 & 8** line (Aloha chipset). This is the 'deluxe' model and supports line disconnect functionality.

  No dip switches or configuration needed.

- **Whozz Calling? POS 2, 4, & 8** (Aloha chipset). This is the 'basic' model.

  Dip switches are located on the front of the unit. Set all dip switches off.

Rochelle — www.rochellecti.com (Austin, TX)

- **Model 2045**. This is the full features model and supports line disconnect functionality.

  No dip switches or configuration needed.

- **Model 2050**. This is the 'basic' model.

  Remove the cover to access the dip switches. All switches should be set off.

Each type of caller ID device has its own configuration requirements. These requirements may include configuring a set of DIP switches, or making other device changes, in addition to port configuration in the operating system. Consult the documentation for your device for correct configuration requirements before attempting to connect or use it.
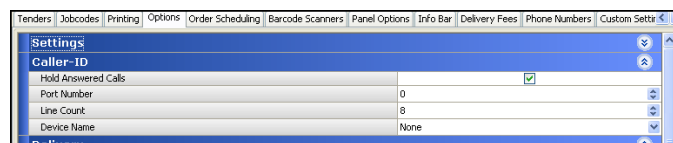
Figure 3 - 19 Takeout Settings, Options, Caller ID

To attach a caller ID device for use with Aloha Takeout:

1. Install any required software and drivers required by the caller ID device on the BOH file server. The Aloha Takeout Windows service must be installed and configured to run on this computer.
2. Configure the Caller ID feature, in **Maintenance > Aloha Takeout Configuration > Options** tab.
   a. Select the **type of device** used, from the 'Device Name' drop-down list.
   b. Select **Hold Answered Calls** to place incoming calls on hold.

When a caller ID line rings, the gray button turns green. Buttons representing answered calls on hold change to maroon on all terminals. When you answer a call, touch the green button to select the line and search for customer information. Other terminals display an "In Use" text on the button. If you need to place the call on hold, touch the button again to change the button color to maroon. Touching the button again changes the color back to blue. The button changes back to gray when an order is started for the selected caller ID line or the caller ID device supports a disconnect signal. These color changes prevent multiple employees attempting to access the same telephone line.

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   c. Select the **Port number**. Be careful to select an unused port, to avoid conflicts.
   d. Select the **Line Count** of the number of **caller ID lines** available.
3. Click **Save**.
4. Connect the **caller ID device** to the specified port.
5. Attach all **telephone lines** to the caller ID device.
6. Restart the **Radiant Takeout and Delivery Windows** service.
7. Refresh **data** on the Aloha BOH file server.

Delivery

The delivery options allow you to configure driver and dispatch settings to meet your operational needs.

To enable delivery and configure its operation:
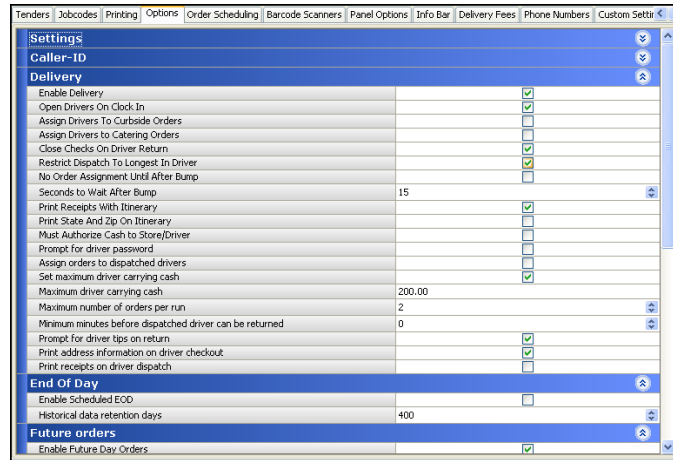
Figure 3 - 20 Takeout Settings, Options, Delivery

1. Select **Enable Delivery** in the Delivery section.
2. Select options, as required, from the Delivery section:

    - Enable **Open Drivers On Clock In** to cause drivers to automatically appear on the Dispatch screen — Driver bar as they clock in. If not enabled, employees with Driver Management access must open drivers manually using the Driver screen. You can close drivers manually, in either configuration. ***Recommended Configuration:*** Enabled.

    - Enable **Assign Drivers To Curbside Orders** to assign drivers to orders booked with the Curbside order type. This feature adapts Aloha Takeout for 'car-hop' environments, or for other dedicated curbside attendants. ***Recommended Configuration:*** Cleared, unless required by site operations.

    - Enable **Assign Drivers To Catering Orders** to assign drivers to orders booked with the catering order mode. This feature adapts Aloha Takeout for delivery catering environments, where catering attendants are accountable for orders and required to perform a checkout at the end of their shift. ***Recommended Configuration:*** Cleared, unless required by site operations.

    - Select **Close Checks On Driver Return** to close the outstanding balance of delivery orders to cash, when a driver returns. If cleared, drivers are required to recall and close each check. ***Recommended Configuration:*** Enabled.

    - Enable **Restrict Dispatch To Longest In Driver** to require assigning orders to the driver with the greatest amount of 'idle time' since clocking in or returning from a previous delivery. This helps distribute orders evenly between drivers. This also helps prevent drivers from assigning themselves preferred orders from the Dispatch screen. Employees can override this requirement, if their access level is configured with 'Can Override Restricted Dispatch' enabled on the Aloha Access Levels tab. ***Recommended Configuration:*** Enabled.

    - Enable **No Order Assignment Until After Bump** to prevent an order from being assigned to a driver until after it is bumped from Aloha Kitchen. This helps prevent drivers from self-assigning preferred orders to themselves before orders are ready. Enable this option only when Aloha Kitchen is installed and functional. Employees can override this requirement, if their access level is configured with Override **No Order Assignment Until After Bump** enabled. ***Recommended Configuration:*** Cleared.

- Use **Seconds To Wait After Bump** to extend the 'No Order Assignment Until After Bump' option with a specific number of seconds after bumping an order from Aloha Kitchen. The number of seconds is based on oven cook times or assembly times before the order is completely ready. This option works best in operations where orders are bumped from the make line to a cooking or assembly process. Employees can override this requirement if their access level is configured with **Override Restricted Dispatch** enabled.
- Enable **Print Receipts With Itinerary** to print customer receipts for each run order when a driver prints an itinerary. This provides drivers all artifacts needed to deliver the assigned orders. Consider enabling this option when receipts are not printed using 'Items Ordered Receipt Printer', 'Print Receipts On Driver Dispatch', 'Order Items Receipt Count' or other methods.
- Select **Print State and Zip on Itinerary** to include (or omit) the state or province name and the Zip or postal code when the system prints the itinerary for the driver. ***Recommended Configuration:*** Cleared in order to save paper, since the State and Zip code rarely change from the location of the store.
- Use **Must Authorize Cash to Store/Driver** to require a manager to authorize cash transfers between the store and drivers, whether they are receiving cash to use for making change, or turning in money collected from deliveries. Employees can override this requirement if their access level is configured with 'Approve Clock In' enabled in **Maintenance > Labor > POS Access Levels**.
- Enable **Prompt for driver password** to display a driver confirmation dialog when dispatching and returning drivers. Select this option if you would like drivers to confirm delivery runs for accountability reasons. Passwords must be set as 'Optional' or 'Required,' in **Maintenance > Store Settings > Security** group **> POS Password Settings** tab, in the CMT for this feature to work. ***Recommended Configuration:*** Cleared, unless using passwords or mag cards for drivers.
- Enable **Assign orders to dispatched drivers** to make it possible to assign orders to a driver who has already been dispatched on a run. This can help improve driver turn-around times by having runs ready upon their return. Drivers can also abuse this option by dispatching and then selecting preferred orders for the next run. Employees can override this requirement if their access level is configured with 'Override Restricted Dispatch' enabled.
- Enable **Set maximum driver carrying cash** and enter the **Maximum driver carrying cash** value to establish an upper limit of cash allowed for drivers to carry. Carrying cash includes money dispensed to a driver plus money collected from customers for delivered orders. This option helps reduce the liability of lost or stolen cash and improves driver safety.
- Enable **Maximum number of orders per run** and use the arrow keys to specify the maximum number of orders allowable to a driver per delivery run. This option limits dispatching drivers with an excessive number of orders that could impact food quality in later stops. Employees can override this requirement if their access level is configured with 'Override Restricted Dispatch' enabled.
- Enable **Minimum minutes before the dispatched driver can be returned**, and use the arrow keys to specify the minimum number of minutes expected for each delivery run. Drivers cannot touch 'Dispatch', then quickly touch 'Return' to select additional preferred orders before they have delivered the previous run. Employees with 'Override Restricted Dispatch' enabled in their access level may override this restriction. This option helps maintain 'Restrict Dispatch to Longest Driver', 'Max Orders Per Run', and 'Assign Orders to Dispatched Drivers' restrictions when enabled. ***Recommended Configuration:*** Optional, depending on staff and operations.
- Enable **Prompt for driver tips on return** to prompt for tips when a driver returns from making deliveries. ***Recommended Configuration:*** Cleared, if drivers have short turn-around times. Drivers can enter tips at any time during their shifts from the Aloha Takeout or POS screens.

- Enable **Print address information on driver checkout** to print the addresses of all orders assigned to a driver during their shift, when they perform their daily checkout. This feature allows drivers to confirm the addresses for which they are accountable during their shift. ***Recommended Configuration:*** Enabled.
- Enable **Print receipts on driver dispatch** to print the latest version of the guest check as drivers dispatch and depart for their delivery run. Consider enabling this option when receipts are not printed using the 'Print Receipts With Itinerary', 'Items Ordered Receipt Printer', 'Order Items Receipt Count', or other methods.

- Enable **Restrict delivery orders to delivery area** to requires all delivery orders to have addresses within the delivery area. Aloha Takeout checks an address when the delivery order mode is selected to begin a delivery order. If the selected customer address is not within the defined delivery area, a dialog box prompts you to override the restriction. 'Can Override Delivery Area Restrictions' allows users to override this restriction.

    This option also enables the type-ahead address lookup feature. Entering a street number on the 'Customer Entry' screen displays a drop-down of street names that contain the street number. Select a street name from the list to populate the street, as well as the city, state, and zip if configured in the delivery area or default settings.

- Enable **Auto cash to store on driver checkout** to transfer the 'Net Cash Owed" from the driver to the cashier assigned to the local terminal cash drawer when touching 'Checkout' on the Drivers screen. Aloha Takeout automatically performs the cash functions to increase the cashier's accountability and decrease the driver's accountability by the 'Net Cash Owed' amount. This option allows managers to only count the cashiers cash drawer at the end of the shift, which includes driver cash owed. ***Recommended Configuration:*** Enabled.

3. Click **Save**.

End-of-Day

Aloha Takeout end-of-day is usually configured to run seperately from the Aloha POS EOD. Typically an ATO EOD occurs prior to a POS EOD since the ATO order records are linked to orders within the POS trans.log. Use the following options to configure when an ATO EOD runs.

To enable and configure End-of-Day (EOD) in Aloha Takeout:
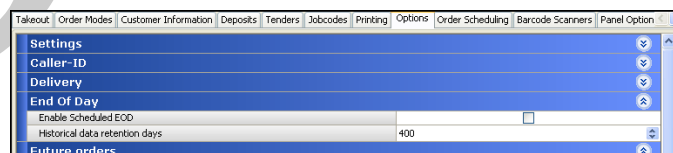
Figure 3 - 21 Takeout Settings, Options, End Of Day

1. Select **Enable Scheduled EOD** in the **End of Day** group box. ***Recommended Configuration:*** Enabled.
2. Confirm the **Poll Time (Seconds)** is set to 30 or more.
3. Use the **arrows** or type the time directly in the **Scheduled Time** text box, to establish the time for the EOD event to occur.

The EOD event established in Aloha Takeout is separate from the EOD event in the Aloha POS system. As a 'best practice,' we recommend configuring the ATO EOD event to run five minutes or more prior to running the Aloha POS EOD.

4. Use the arrows or type in the **Historical data retention days**, to establish the number of days to store detailed historical data in the Aloha Takeout database. Site visit count and other summary information is continually stored. Depending on drive space and operational needs set the historical retention days to a reasonable amount to recall full order information in Aloha Takeout customer reports. ***Recommended Configuration:*** Leave as the default (400 days) unless hardware storage limitations or marketing dictates adjusting this setting.

5. Click **Save**.

Future Orders

Future orders allow you to accept orders for later the same day, or any day in the future up to five years in advance. The following options enable and configure the release of future orders to meet your operational needs.

To enable future orders, and select a future order void reason:
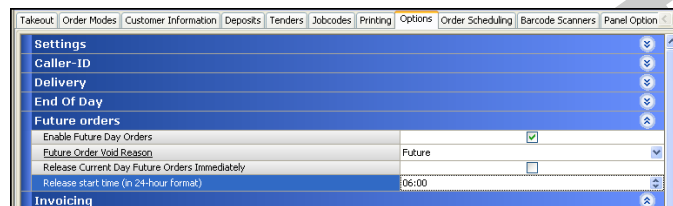
Figure 3 - 22 Takeout Settings, Options, Future Orders

1. Select **Enable Future Day Orders** to accept orders beyond a promise time in effect on a given day, in addition to accepting orders for preparation on a day in the future. ***Recommended Configuration:*** Enabled.

   • Select the **Future Order Void Reason** from the drop-down list, to make it possible to save future orders. Aloha Takeout's communication through Aloha Connect requires a void reason to 'clear' the items from a temporary check used to enter future order items. Items are stored in the Aloha Takeout database until recalled or released. ***Recommended Configuration:*** Select the Future Order Void Reason defined earlier in the POS configuration section.

   • Enable **Release Call-in orders based on preparation time** in operations where the food takes less time to prepare than it takes a customer to get to the location. Aloha Takeout 'holds' an order until the prep time minute setting prior to the call in quote time. For example, if the call in quote time is 20 minutes, and the prep time is 5 minutes, Aloha Takeout delays the order for 15 minutes, then releases to the kitchen to provide hot fresh food when a customer arrives. ***Recommended Configuration:*** This option was implemented for an operation that used this feature to load balance dine in and pick up orders. In most operations, the call in quote time = the prep time, so this option is cleared.

   • Enable **Release Current Day Future Orders Immediately** to release new orders due for fulfillment later today, when finalized. This option overrides Aloha Takeout's auto-release of orders, based on promise time and prep time. Upon finalization, a future order is released and prints in the kitchen. This functionality assumes the kitchen maintains and manages the preparation and production of these orders. The promise time is printed in the ATO header portion of the kitchen chit to help kitchen staff organize these orders. ***Recommended Configuration:*** Optional — Clear this option to have Aloha Takeout automatically time and release future orders for the current day. Enable this option if your operation has large orders that the kitchen needs to be aware of and prepare for throughout the day.

- Define the **Release start time (in 24-hour format)** when Aloha Takeout automatically releases future orders booked on prior days. This option depends on enabling 'Release Current Day Future Orders Immediately'. This allows the kitchen to view future orders for the day and prepare accordingly. ***Recommended Configuration:*** Select a time when the kitchen staff is present and ready to organize orders.
- Enable **Activate Future Orders Via Server** to release future orders from the BOH when a FOH ATO client is unavailalbe.

2. Click **Save**.

If you do not designate a future orders void reason, you cannot save future orders. If you later rename or otherwise render the void reason invalid, this can also prevent saving future orders.

Invoicing

With the addition the Enable House Account option and functionality, printing invoices for house account orders may be a commonly implemented option. Aloha Takeout has the ability to print an 8 1/2 x 11 invoice to the default Windows printer defined on the local terminal.

Set the "ATOSERVERDIR" on the terminal to the Aloha directory (%IBERDIR%) on the Aloha BOH computer. Example: \\AlohaBOH\Bootdrv\Aloha. Invoices are stored to the %IBERDIR%\FTP\Invoices directory on the Aloha BOH when properly configured. Companies may elect to poll this directory through Insight to store electronic copies of invoices at the corporate office. Saved invoices may be viewed using the Takeout Invoice Viewer utility.

Configure a local or network printer on the terminal and set as the default printer. Aloha Takeout uses the 'default' printer on the local terminal to print invoices.

To enable Invoicing, and configure printing parameters:

Figure 3 - 23 Takeout Settings, Options, Invoicing

1. Use the **arrow keys** to specify the number of items to print on the first page of the invoice in the **First Page Item Count** option. Because of the invoice header and footer on the first page, not as many items can be printed on the first page as the remaining pages. ***Recommended Configuration:*** Initially set to 5 and adjust as needed depending on typical items and modifiers.
2. Use the **arrow keys** to specify the number of items to print on the middle page(s) of the invoice in the **Middle Page Item Count** option. If an invoice spans more than 3 pages, this setting is used for all pages except the first and last. ***Recommended Configuration:*** Initially set to 15 and adjust as needed depending on typical items and modifiers.

3. Use the **arrow keys** to specify the number of items to print on the last page of the invoice in the **Last Page Item Count** option. *Recommended Configuration:* Initially set to 15 and adjust as needed depending on typical items and modifiers. Editing the InvoiceLayoutLast.xaml in the %ATOPATH%\Data folder may affect the number of items that fit on the last invoice page.
4. Enable the **Auto-save Invoice** option to save an electronic copy of the invoice in .xps format each time an invoice is printed. Subsequent printing of an invoice replaces the previous version. *Recommended Configuration:* Enable.
5. Enable the **Auto-print Invoice** to print an invoice each time a house account payment is applied to an order. This eliminates the need to touch 'Print Invoice'. Additional copies may be printed using this button.
6. Enable the **Include Item Modifiers** option to print modifiers on an invoice, in addition to parent items. *Recommended Configuration:* Enable depending on operation needs, invoice length, and customer requested detail. In most cases, disabling this option meets the needs of accounting departments entering the information, however some companies require more detailed information.
7. Click **Save**.

Disregard these settings, unless you are accepting house accounts.

Aloha Kitchen

Aloha Kitchen integration provides dynamic quote time update and order release. When implemented, Aloha Takeout releases orders to Aloha Kitchen. Aloha Kitchen manages when orders appear on the screen, providing hot and fresh food to customers. Kitchen Integration options are applicable, only if you are using Aloha Kitchen. If you are not using this product, clear Enable Kitchen Interface and disregard all of these options.
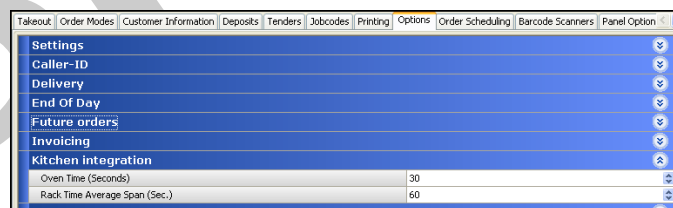
Figure 3 - 24 Takeout Settings, Options, Kitchen integration

To enable kitchen integration:

- Select **Enable Kitchen Interface** to enable communication between Aloha Takeout and Aloha Kitchen. *Recommended Configuration:* Implement Aloha Kitchen and enable. Clear if not using Aloha Kitchen functionality.
- Enable **Suppress POS Chit Printing** to disable chit printing from within Aloha Takeout, when using Aloha Kitchen. All order information is displayed and managed on the Aloha Kitchen screens. *Recommended Configuration:* Enable to reduce paper cost.

To enable and track oven and rack time:

- Use the **arrow keys** to specify the number of **seconds** for **Oven Time** and **Rack Time Average Span**. Similar to the Seconds to Wait After Bump, this option primarily works in a prep table environment where items are 'bumped' into an oven. Based on the Oven Time value, Aloha Takeout can calculate the time that prepared items sat on a rack prior to dispatch by

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determining the difference between the bump time and the dispatch time, accounting for a known oven time. This metric is used by operators to determine efficiency and food quality. The Rack Time Average Span (Sec.) determines the number of seconds to average the rack time metrics over. These options specify the average number of seconds allowed for an item to spend during the cooking process, and for tracking average rack time. ***Recommended Configuration:*** Set the Oven Time based on equipment settings or documented cooking procedures. This could be 0 if items are fully prepared when bumped. Define the Rack Time Average seconds that make sense, for example the last 30 minutes (1800). Calculating the Rack Time Average for the entire day may not make sense.

- These options are designed to enable metric features that make it possible to track product quality by verifying the time orders spend on a counter, losing quality.

Redundancy

ATO provides similar offline functionality to the POS in the event the BOH file server is unavailable on the network.

To enable offline support:
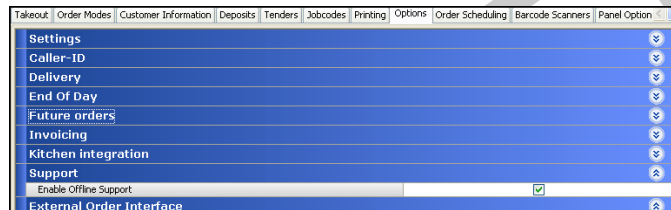
Figure 3 - 25 Takeout Settings, Options, Support

Enable the **Enable Offline Support** option to write order information to the Offline folders on each ATO client.

External Order Interface

The external order interface functionality is reserved for future versions of Aloha Takeout.

External Order Interface:
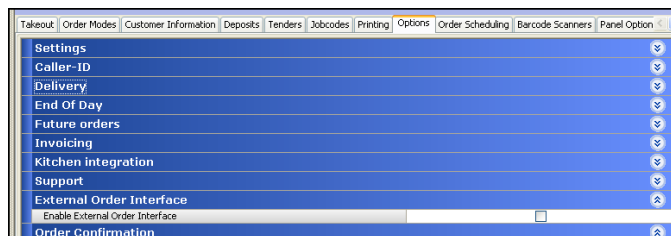
Figure 3 - 26 Takeout Settings, Options, External Order Interface

Clear the Enable External Order Interface option. This feature is currently not supported by Aloha Takeout.

Order Confirmation

A confirmation screen may be enabled to appear when an order taker completes an order. This allows them to review the order, promise time, and contact information with a customer before finalizing the order and sending it to the kitchen. If adjustments are needed, an order taker may return to the POS to edit the order, change customer information, or change the promise time to a later time or date.

To enable order confirmation:
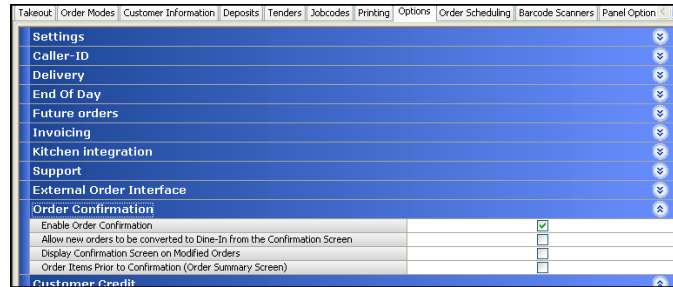
Figure 3 - 27 Takeout Settings, Options, Order Confirmation

- Select the **Enable Order Confirmation** option to display a dialog when touching a FLEX_ENTRY_COMPLETE button function to finalize the order. ***Recommended Configuration:*** Enabled. Order mode, promise time, payment and other changes can quickly be made from the configuration screen based on customer needs.

- Make it possible to convert new unordered takeout orders to dine-in orders, with Quick Service, by enabling the **Allow new orders to be converted to Dine-In from the Confirmation Screen** option. This option requires the "Dine-In" order mode be mapped to a POS Order Mode on the **Takeout Settings > Order Modes** tab. ***Recommended Configuration:*** Cleared, unless the customer started a dine-in order incorrectly at the 'takeout' counter. This is most often used in quick casual environments.

- Enable the **Display Confirmation Screen on Modified Orders** to re-display the confirmation dialog each time an ATO check is recalled and re-finalized. ***Recommended Configuration:*** Clear this option to avoid unnecessary dialog displays and additional screen touches.

- Enable the **Order Items Prior to Confirmation (Order Summary Screen)** to order items on the check and apply delivery fees before the confirmation screen is displayed. ***Recommended Configuration:*** Enable is using POS v6.5 and prior or Aloha Takeout v1.1. These versions do not support passing or configuring delivery fees. The confirmation screen total and applied payments will not include the delivery fee and cause customer confusion.

    Clear this option in POS v6.7 and Aloha Takeout v1.2 and higher. These versions allow delivery fees to be calculated through Aloha Takeout, then passed to the POS for proper display on the confirmation screen.

Customer Credits

Use customer credits to apply a credit to a customer account for a future order, to make amends for trouble with a previous order. Enabling this feature causes Add Credit to appear in the Customer Details FOH screen. Configure the GuestCreditColumn to appear on the Panel Options tabs to indicate when customers have pending credits. If the new order price is not as large as the existing credit, Aloha Takeout comps the entire order, and cancels any remaining credit.

To enable customer credits:
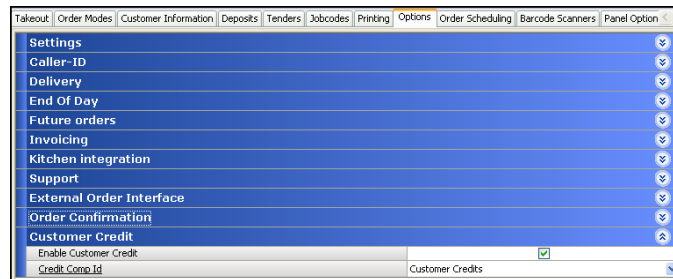
Figure 3 - 28 Takeout Settings, Options, Customer Credit

Select **Enable Customer Credits**, and select a **Credit Comp ID** (See "Create Comp for Customer Credit" on page 2-27) to enable the Customer Credits feature.

Order Scheduling

Use the Order Scheduling tab to limit the number of future orders or items accepted for a defined time segment. This allows operations to accept only a number of future orders that is appropriate for an expected number of driver and kitchen resources. This limitation can reduce the number of customer complaints received as a result of over-committed driver and kitchen resources. The system manages the available time segments across multiple terminals on a first-come first-served basis. You can make the schedule complex or simple according to your business needs.

Steps at a glance:

1. Set the **default values**.
2. Create **business day parts** for each day in the Weekly Schedule.
3. Enable the **order mode types**, to track order and item capacity.
4. Set the c**apacity thresholds for each day**, by business day part.

You configure order scheduling in two parts:

Schedules — Define the business day parts for each day of the week. Business day parts should include:

- Times when a store is closed and not accepting takeout and delivery orders.
- Meal periods, like breakfast, lunch, and dinner, when kitchen and driver staff are scheduled to address takeout and delivery orders.
- Times between meal periods where the store is open and accepting ATO orders, but kitchen and driver staffing is reduced.

Business day periods are further broken down into capacity time segments. Each segment should represent a logical time period. For example, set capacity segments to 15 minutes if an average delivery run takes 15 minutes to deliver and return to the store. Takeout only operations may pick arbitrary 10, 15, or 20 capacity time segment minutes to measure how many items can be produced within that time.

Capacity Tracking — Works within the schedule to define the number of orders or items that can be fulfilled within a given capacity time segment. Set the order and item capacity based on the following:

- An average number of orders that can be delivered by one driver within a capacity time segment.
- An expected number of drivers scheduled during a time segment.
- A number of items that can be produced per minute by an average employee within a capacity time segment.
- An expected number of kitchen production employees scheduled for during a time segment.
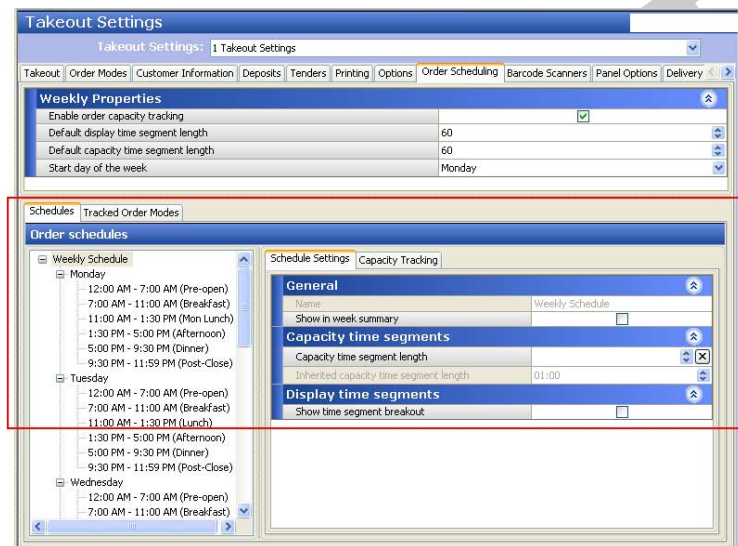
Figure 3 - 29 Takeout Settings, Order Scheduling tab

To configure the weekly schedule in the restaurant:

1. Select **Enable Order Capacity Tracking** to enable the feature.
2. Select the **Default Display Time Segment Length** to establish a number of minutes per visible time segment, as displayed in the Order Management screen. The defined value is used as the 'Inherited capacity time segment length', unless set at the Weekly Schedule or daily level. **Recommended Configuration:** Match this number to the Default Capacity Time Segment Length.

3. Select the **Default Capacity Time Segment Length** to define the number of minutes per order capacity time segment Aloha Takeout uses when calculating the number of orders and items permissible per unit of time. *Recommended Configuration:* Set this number to the length of an average delivery order round trip in your area, or the measured number of minutes used to determine kitchen productivity capacity. This is usually 15 or 20 minutes.

> For example, consider a day broken up into business day parts, each broken up into 15-minute segments. Select a time block from the Weekly Schedule section, then use the Schedule Block Properties section to specify how many delivery orders you want to allow per 15-minute time segment. When you attempt to add an order in excess of this number, the system warns you that you are exceeding your specified order capacity.

4. Select the **first day** of your business week from the **Start Day of the Week** drop-down list.
5. Use the options on the **Schedule Block Properties tab** to create business day parts, shown in the 'Weekly Schedule' section, for which you want to limit the number of orders you can accept in a given amount of time.
6. Name the business day part.

> *Notes*
> Order scheduling day parts are similar to POS day parts. However, order scheduling day parts are based on scheduled resources as opposed to sales tracking. Although they may be similar, they do not need to match.

   a. Set the **Capacity time segment length**.

      • **Active business periods** — Leave blank to use the Inherited capacity item segment length, or enter a time segment length, if different from the default or inherited value.
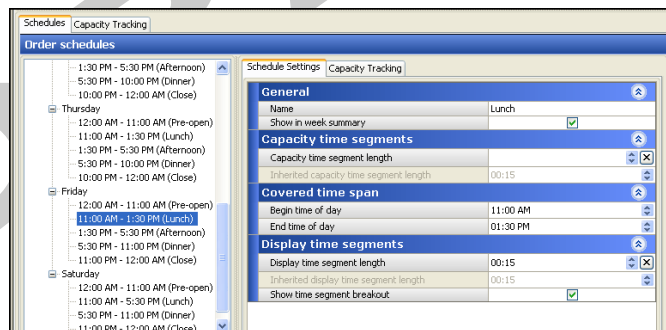
Figure 3 - 30 Lunch business period example

Closed business periods — Enter a time span for the entire segment a site is closed. For example, set the pre-open capacity time segment length to 11:00 (11 hours) to account for the time from midnight to 11:00 am when the store starts fulfilling ATO orders.
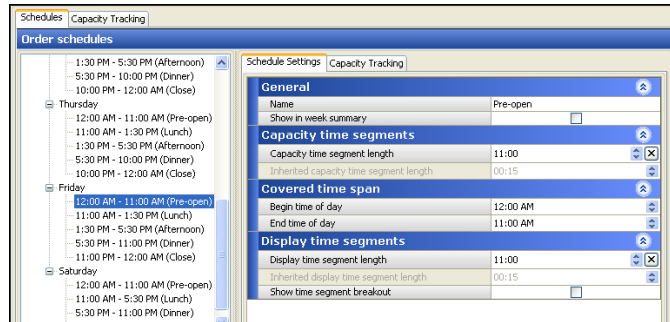
Figure 3 - 31 Pre-open business period example

b. Set the **Begin time of day** and **End time of day** to the beginning and ending times of a business day part. For example, set the "Lunch" covered time span 'Begin time of day' to 11:00 AM and the 'End time of day' to 01:30 PM.

c. Set a **Display time segment length**.

In most cases, the 'Display time segment length' matches the 'Capacity time segment length.' You can adjust this in slow periods, to consolidate the screen when few future orders are booked. For example, the afternoon business period may continue to have 'Capacity time segment length' set to 00:15, yet the 'Display time segment length' may be set to 04:00' to cover the four hours between 01:30 PM and 05:30 PM (lunch and dinner business periods).

Reduce the **Display time segment length** during meal periods to display detail. Increase the **Display time segment length** in slow times to reduce scrolling and improve screen response when navigating to the Future screen.

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7. Click **Save**.
8. Select the **Capacity Tracking** tab' to reveal the list of order modes available for item and order restrictions.
9. Click **Add** to select an order mode type for capacity tracking.
   a. Enable **Limit order count** to limit the number of future orders that can be accepted for the selected order mode type. Delivery is typically the only order mode type limited by order count due to driver resources. However, call in orders could be limited if the kitchen or cashier staff have an order count threshold they are able to fulfill.
   b. Enable **Limit item count** to limit the number of items based on category the kitchen staff can produce within a given capacity time segment.

c. Select the **From item category** that contains items the kitchen has production limits. This is sandwiches, burritos, or other entree items that take time for the kitchen to produce.

d. Enable the **Tracked with <*order mode type*>** for each order mode type that is produced by the same kitchen staff and counted together towards capacity. For example, if a kitchen employee can produce 30 items in 15 minutes, the 30 items may be made up from delivery, call-in, or curbside orders. Capacity is met when the items from various order mode types add up to the capacity threshold.
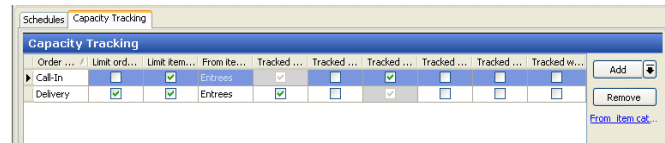
Figure 3 - 32 Capacity tracking by order mode type

10. Select each day part and enter the item and order capacity if different from the inherited capacities.
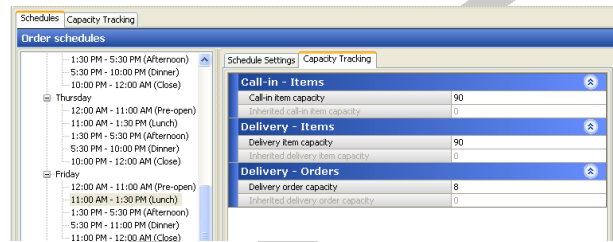
Figure 3 - 33 Day part capacity

In the example above:

- The **Call-in item capacity** and **Delivery item capacity** are set to the same 90 (item) value. This is based on an average employee able to produce 30 items within the defined 15 minute **Capacity time segment length**. The site schedules 3 employees on Friday lunch to address ATO order production. 30 items x 3 employees = 90 capacity for the Friday lunch day part.

- **Delivery order capacity** is set to 8. This is based on the average driver delivering 2 orders within the defined 15 minute Capacity time segment length and the schedules 4 drivers on Friday lunch. 2 orders x 4 drivers = 8 delivery order capacity for the Friday lunch day part.

11. Click **Save**.

Barcode Scanners

Use this tab to enable USB bar code readers. Barcode scanners are used to scan items in a mixed take-out and convenience store environment. Currently, only one reader of this type has been tested by NCR Corporation, the Symbol LS-2208, which makes the reader available for purchase through normal chan-

nels. Other USB readers may, in fact, work with Aloha Takeout and the Aloha POS system, but no others have been tested. Aloha Takeout checks containing a barcode may be scanned to recall, add additional items to the check, tender and close.
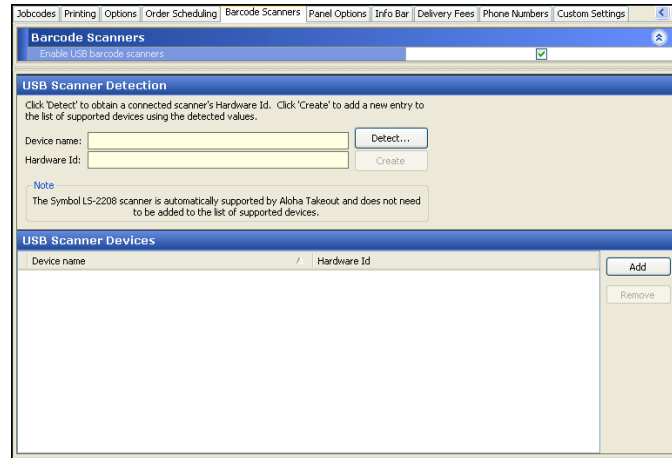
Figure 3 - 34 Takeout Settings, Barcode Scanners

Enable USB Barcode Scanner — Makes the bar code reader feature active.

Device Name column — Accepts the typed name of a USB bar code reader device.

Hardware ID column — Accepts the typed hardware ID of a USB bar code reader device.

Add Scanner — Accesses a dialog box that enables you to add a reader device to the list.

Delete — Removes a selected reader device from the list.

Add This Device — Adds the device displayed in the associated, non-editable text boxes. Scan a bar code with the device, with the Barcode Scanners Tab active, to obtain the correct name and hardware ID of the device.

If a normal keyboard is attached to the terminal along with the bar code reader, Aloha Takeout may detect the keyboard instead.

Panel Options

Use the User Interface tab to modify certain aspects of the user interface behavior, to meet specific needs in your business. When selecting the 'Enable 2nd Generation UI' option, additional tabs appear to customize columns, buttons, and other elements on the Aloha Takeout screens.

Using the Second Generation User Interface

The 'Guest Manager' user interface, introduced with Aloha Takeout v1.2, appears when you select **Enable 2nd generation UI**. We recommend using this option for consistency between the NCR applications and simplicity of use. This option is targeted to become the default UI in an upcoming version of Aloha Takeout.

If the 'POS Type' is set to Quick Service, select the **Aloha tender screen**, using the drop-down list, to display when the Tender button is touched in ATO.

Screen tabs

Use these tabs to select the columns to make available in the associated screens, search time-out intervals, and more. The tabs available on the 'Second Generation UI' tab are as follows:

- Look Up
- Pick Up
- Dispatch
- Future
- Customer Selection
- Order Details
- Driver
- Info Bar
- All Orders

Most tabs available have a Columns or Order Modes section, with an Available and Selected list in each section. Use Add to select columns and order modes. Use 'Move up' and 'Move down' to rearrange items in the selected list and customize the order in which the listed columns appear in Aloha Takeout.

Lookup Tab

The options on this tab apply only to the appearance and behavior of the Look Up screen.
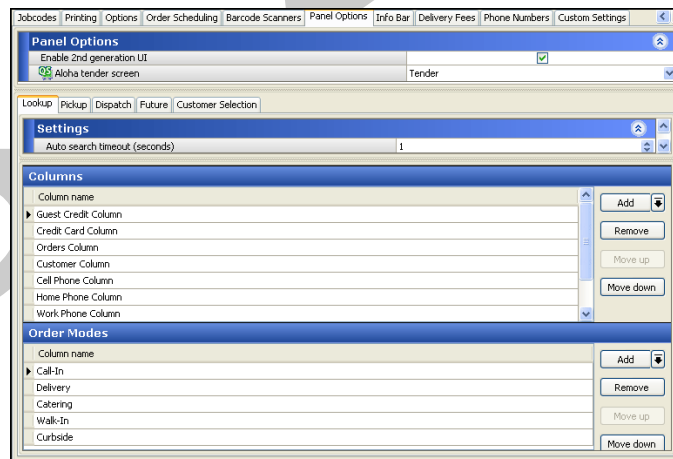
Figure 3 - 35 Takeout Settings, Panel Options, Lookup tab

- Use the arrows to select the **Auto search timeout (seconds)**. This defines the number of seconds of inactivity the system waits before performing a search for customers, as characters are entered. *Recommended Configuration:* 1 second.
- Determine which **Columns** appear on the Look Up screen, and the order in which the columns appear.

  1. Click **Add** and select the column **Type** from the drop-down list.
  2. Click **OK** to add the column to the active list.
  3. Use **Move up** and **Move down** to organize the columns from left to right as they appear on the Look Up screen.

4. Click **Save**.

   Recommended Configuration: Select columns based on order taking procedures and other options selected. For example, if your site does not use customer credits, do not add it to the list. The top (left) most column should contain information to help order takers identify customers based on the search criteria. Other column selections provide additional information to help select the correct customer or provide customer status that may be helpful in the order entry process.

   See the Aloha Takeout Reference Guide for column definitions.

- Determine which **Order Modes** appear on the Look Up screen, and the order in which the order mode buttons appear from top to bottom.

   1. Click **Add** and select and order mode **Type** from the drop-down list.
   2. Click **OK** for the order mode to appear on the Look Up screen.
   3. Use **Move up** and **Move down** to organize the order mode buttons from top to bottom on the right side of the Look Up screen.
   4. Click **Save**.

   Recommended Configuration: In most cases the selected order modes should match those defined on the **Order Modes** tab. Organize the order modes from most used to least used, to speed up order entry.

   See the Aloha Takeout Reference Guide for order mode definitions.

Pickup Tab

The options on this tab apply only to the appearance and behavior of the Pick Up screen.
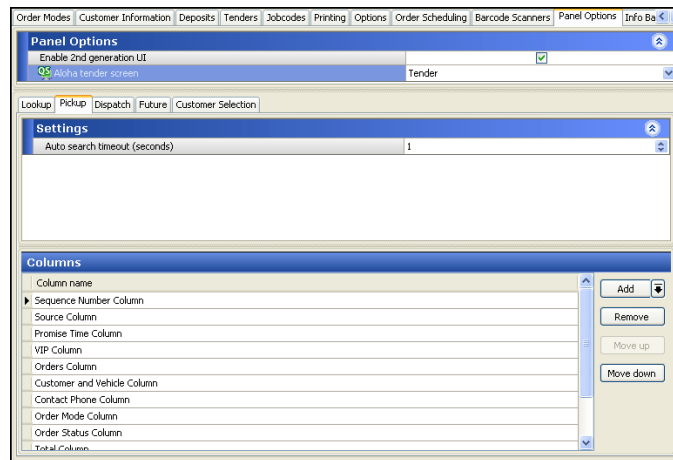
Figure 3 - 36 Takeout Settings, Panel Options, Pickup

- Using the arrows to select the **Auto search timeout (seconds)**. This defines the number of seconds of of inactivity the system waits, as characters are entered, before performing a search for orders. ***Recommended Configuration:*** 1 second.
- Determine which **Columns** appear on the Pick Up screen, and the order in which the columns appear.

    1. Click **Add** and select the column **Type** from the drop-down list.
    2. Click **OK** to add the column to the active list.
    3. Use **Move up** and **Move down** to organize the columns from left to right as they appear on the Pick Up screen.
    4. Click **Save**.

See the Aloha Takeout Reference Guide for column definitions.

- Select **Actions** to appear on the right side of the Pick Up screen, which best apply to your operational needs.

    1. Click **Add** and select an **Action** from the 'Type' drop-down.
    2. Click **OK** to enable the action on the Pick Up screen.
    3. Use **Move up** and **Move down** to organize actions from top to bottom on the screen.
    4. Click **Save**.

See the Aloha Takeout Reference Guide for actions definitions.

Dispatch Tab

The options on this tab apply only to the appearance and behavior of the Dispatch screen.
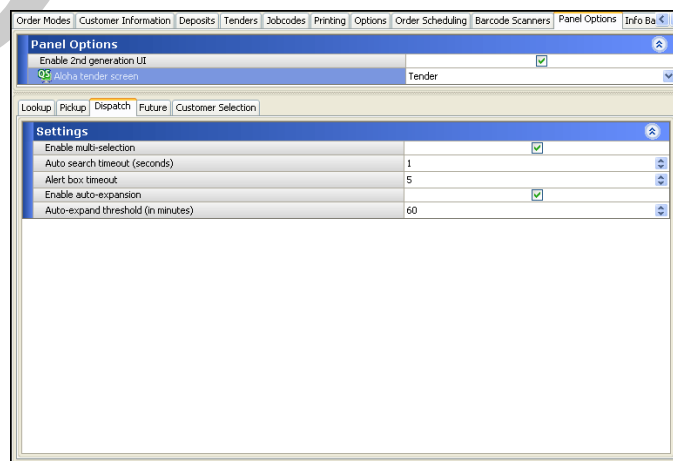
Figure 3 - 37 Takeout Settings, Panel Options, Dispatch

- Select **Enable multi-selection** to give employees the ability to select more than one order at a time, and then to assign all selected orders to a specific driver. The current order selected is

outlined in green. As additional orders are selected, previously selected orders are outlined in yellow. When the Max Orders per Run setting is reached, the selected order is displayed in red, along with a 'nag' dialog to indicate you have reached the threshold. ***Recommended Configuration:*** Enabled.
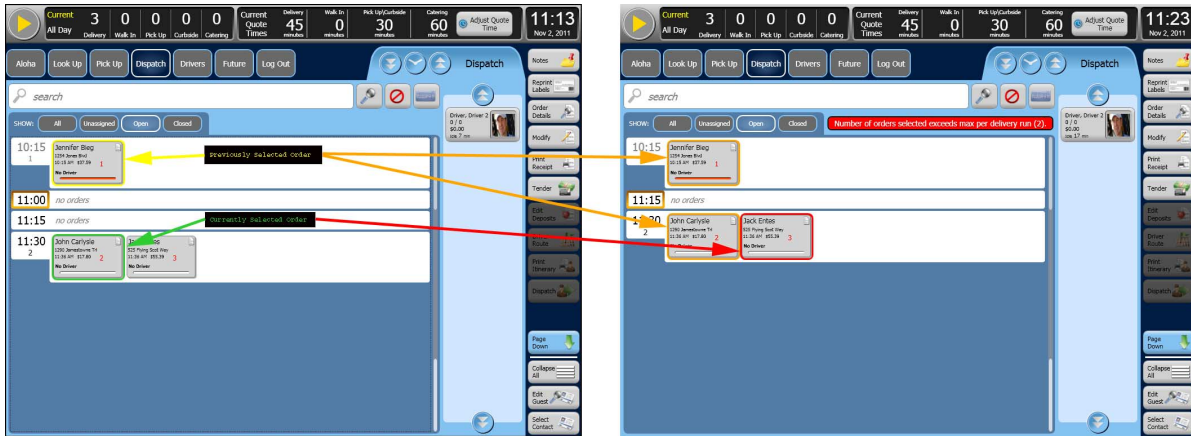
Figure 3 - 38 Dispatch screen, Multi-select

- Use the arrows to select the **Auto search timeout (seconds)**. This defines the number of seconds of inactivity the system waits, as characters are entered, before performing a search for orders. ***Recommended Configuration:*** 1 second.
- Define the **Alert box timeout** an alert box remains visible before it closes. ***Recommended Configuration:*** 5 seconds; increase the time if 5 seconds is not long enough to read and react to the alert.
- Select **Enable auto-expansion** to auto-expand segments when navigating to the Dispatch screen. Upcoming order segments appear in expanded segments for dispatch. Orders for later dispatch are hidden in collapsed segments. This reduces information overload and button touches to expand segments each time the Dispatch screen is accessed. ***Recommended Configuration:*** Enabled.
- Define the **Auto-expand threshold (in minutes)** in advance of the current time that segments expand. ***Recommended Configuration:*** 60 minutes; increase or decrease depending on the number of segments that need to be viewed.
- Select **Actions** to appear on the right side of the Dispatch screen, which best apply to your operational needs.

    1. Click **Add** and select an **Action** from the 'Type' drop-down.
    2. Click **OK** to enable the action on the Dispatch screen.
    3. Use **Move up** and **Move down** to organize actions from top to bottom on the screen.
    4. Click **Save**.

See the Aloha Takeout Reference Guide for actions definitions.

Future Tab

The options on this tab apply only to the appearance and behavior of the Future Orders screen.
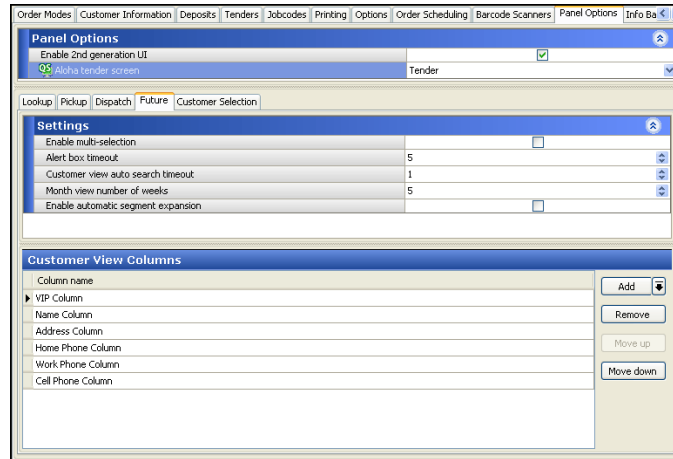
Figure 3 - 39 Takeout Settings, Panel Options, Future

- Select **Enable multi-selection** to give employees the ability to select more than one order, at a time, for assignment to release. Use this option to select all orders for breakfast, then touch 'Release Now' to release all the selected orders. This can help with catering operations by manually sending orders to the kitchen in bulk. *Recommended Configuration:* Enabled; clear this setting if **Release Current Day Future Orders Immediately** is enabled, as this will automatically release orders for the current day immediately or at the defined **Release Start Time** if booked on a previous day.
- Define the **Alert box timeout** an alert box remains visible before it closes. *Recommended Configuration:* 5 seconds; increase the time if 5 seconds is not long enough to read and react to the alert.
- Define the **Customer view auto search timeout** in seconds, the application searches for an order, in the customer view, before timing out. *Recommended Configuration:* 1 second.
- Establish the **Month view number of weeks** visible at one time in the Month view. *Recommended Configuration:* 5 (weeks) for 15" screen or larger terminals; 3 (weeks) for 12" screen terminals with 800x600 resolution.
- Select **Enable future auto expansion** to auto-expand when navigating to the Future screen. Upcoming order segments are displayed for viewing and releasing. Orders for later dispatch are hidden in collapsed segments. This reduces information overload and button touches to expand segments each time the Future screen is accessed. *Recommended Configuration:* Enabled.
- Define the **Future auto expand threshold (in minutes)** in advance of the current time that segments expand. *Recommended Configuration:* 90 minutes; increase or decrease depending on the size of the segments and when they need to be viewed.
- Determine which **Customer View Columns** appear on the Future screen, and the order in which the columns appear.

  1. Click **Add** and select the column **Type** from the drop-down list.
  2. Click **OK** to add the column to the active list.

3. Use **Move up** and **Move down** to organize the columns from left to right as they appear on the Future screen.

4. Click **Save**.

See the Aloha Takeout Reference Guide for column definitions.

- Select **Actions** to appear on the right side of the Future screen, which best apply to your operational needs.

  1. Click **Add** and select an **Action** from the 'Type' drop-down.
  2. Click **OK** to enable the action on the Future screen.
  3. Use **Move up** and **Move down** to organize actions from top to bottom on the screen.
  4. Click **Save**.

See the Aloha Takeout Reference Guide for actions definitions.

Customer Selection Tab

The options on this tab apply only to the appearance and behavior of the Customer Selection screen. The Customer Selection screen appears when using FLOW_ORDER_TO_TAKEOUT and when scheduling a future order.
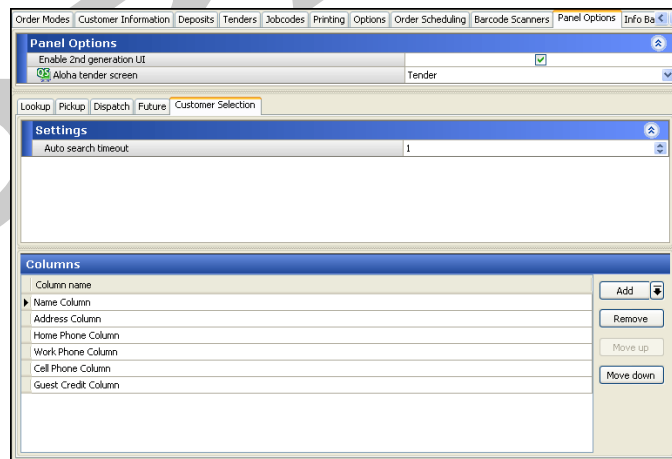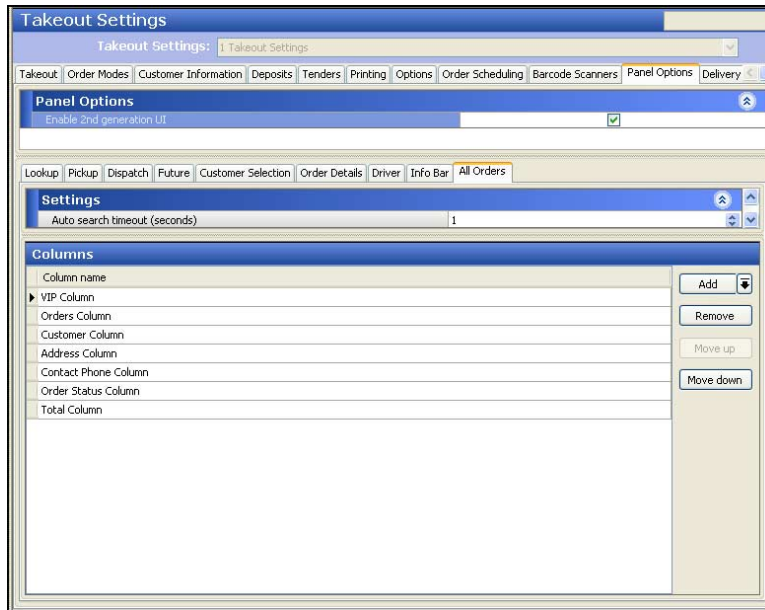

Figure 3 - 40 Takeout Settings, Panel Options, Customer Selection

- Define the **Auto search timeout** seconds of inactivity the system waits before automatically performing a search for criteria already entered. **Recommended Configuration:** 1 second.
- Determine which **Columns** appear on the Customer Selection screen, and the order in which the columns appear.

  1. Click **Add** and select the column **Type** from the drop-down list.
  2. Click **OK** to add the column to the active list.

3. Use **Move up** and **Move down** to organize the columns from left to right as they appear on the Customer Selection screen.
4. Click **Save**.

See the Aloha Takeout Reference Guide for column definitions.

- Select the **Actions** to appear on the right side of the Customer Selection screen, which best apply to your operational needs.

  1. Click **Add** and select an **Action** from the 'Type' drop-down.
  2. Click **OK** to enable the action on the Customer Selection screen.
  3. Use **Move up** and **Move down** to organize actions from top to bottom on the screen.
  4. Click **Save**.

See the Aloha Takeout Reference Guide for actions definitions.

Order Details Tab

The options on this tab apply to the action buttons that appear on the Order Details screen. The order details screen is accessed by selecting an order and touching Order Details on the Pick Up or Dispatch screens.
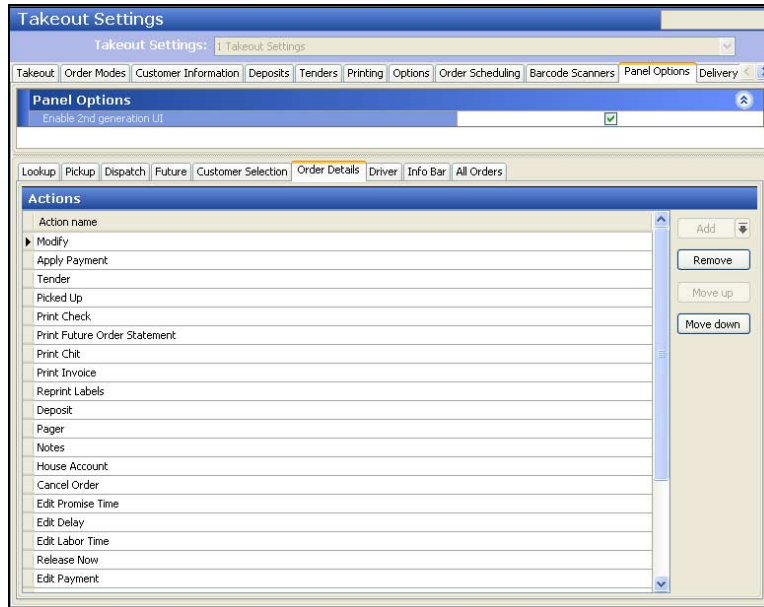
Figure 3 - 41 Takeout Settings, Panel Options, Order Details

- Select the **Actions** to appear on the right side of the Order Details screen, which best apply to your operational needs.

    1. Click **Add** and select an **Action** from the 'Type' drop-down.
    2. Click **OK** to enable the action on the Order Details screen.
    3. Use **Move up** and **Move down** to organize actions from top to bottom on the screen.
    4. Click **Save**.

See the Aloha Takeout Reference Guide for actions definitions.

Driver Tab

The options on this tab apply to the action buttons that appear on the Driver screen.
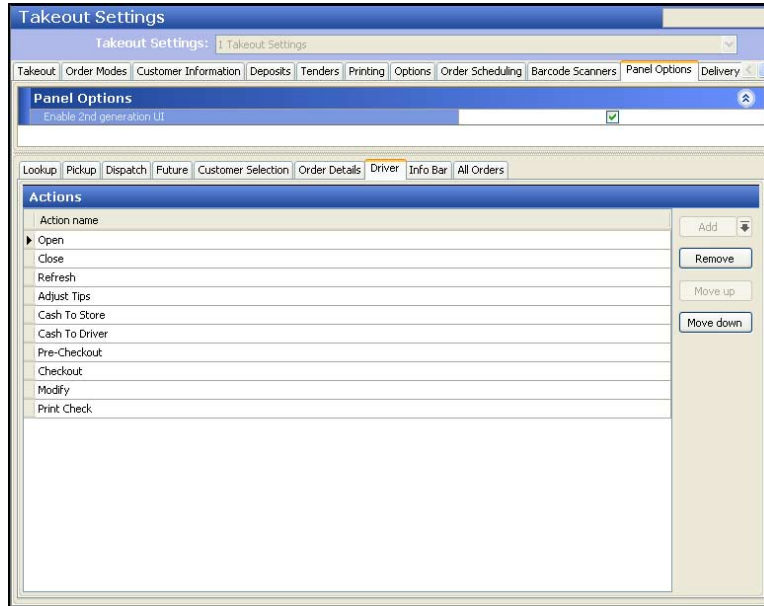
Figure 3 - 42 Takeout Settings, Panel Options, Driver

- Select the **Actions** to appear on the right side of the Driver screen, which best apply to your operational needs.

  1. Click **Add** and select an **Action** from the 'Type' drop-down.
  2. Click **OK** to enable the action on the Driver screen.
  3. Use **Move up** and **Move down** to organize actions from top to bottom on the screen.
  4. Click **Save**.

See the Aloha Takeout Reference Guide for actions definitions.

Info Bar Tab

The options on this tab apply only to the appearance and behavior of the Dashboard Settings dialog, when touching 'Adjust Quote Time.' The settings on the Info Bar tab define which quote time elements appear and the adjustment minute increment for each element. Select quote elements based on the order modes selected on the Order Modes tab.
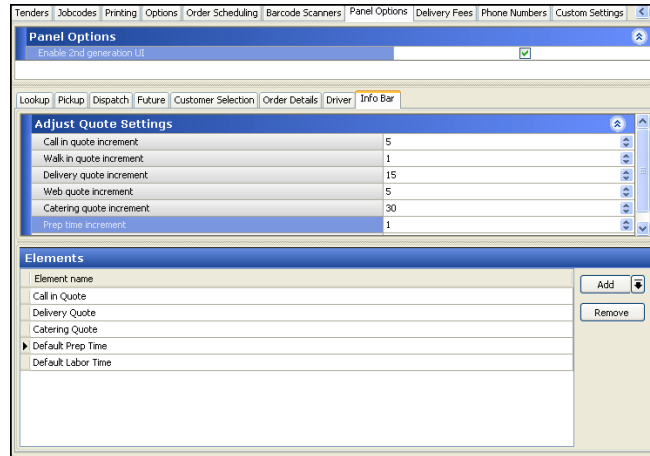
Figure 3 - 43 Takeout Settings, Info Bar
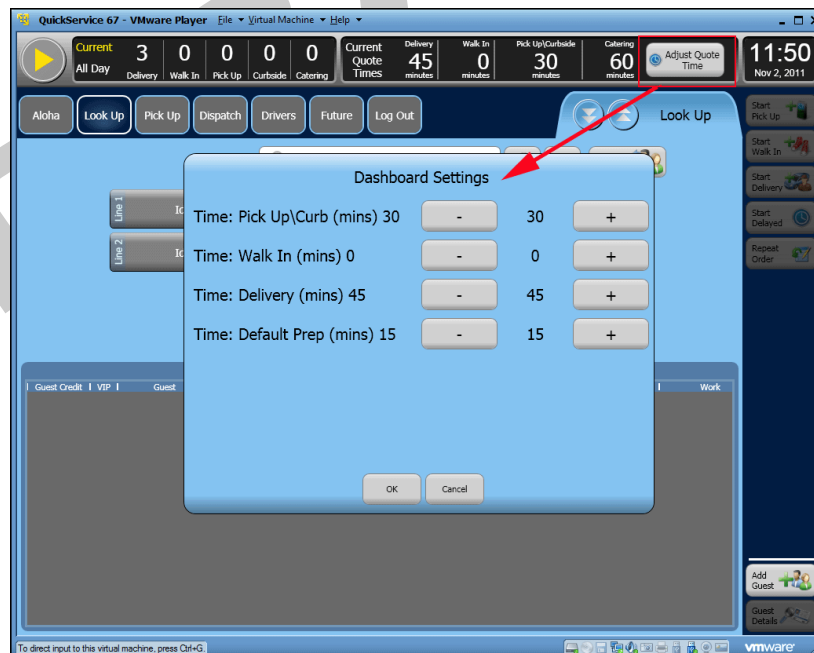
Figure 3 - 44 Dashboard Settings Dialog

Adjust Quote Setting

Various quote times may require more fine tuning than others. Call-in quotes depend on kitchen resources, yet delivery quotes depend on kitchen and driver resources. Aloha Takeout allows you to define quote time increments differently by order type. This allows you to quickly increase or decrease the quote time as business dictates.

- Define the **Call In Quote Increment** in minutes to increment or decrement the call-in quote time when you touch the up and down arrows on the Adjust Quote screen. ***Recommended Configuration:*** 5 minutes.
- Define the **Walk In Quote Increment** in minutes to increment or decrement the walk-in quote time when you touch the up and down arrows on the Adjust Quote screen. ***Recommended Configuration:*** 1 minute.
- Define the **Delivery Quote Increment** in minutes to increment or decrement the delivery quote time when you touch the up and down arrows on the Adjust Quote screen. ***Recommended Configuration:*** 15 minutes.
- Define the **Web Quote Increment** in minutes to increment or decrement the web quote time when you touch the up and down arrows on the Adjust Quote screen. ***Recommended Configuration:*** Optional, depending on whether web orders are for pick-up or delivery.
- Define the **Catering Quote Increment** in minutes to increment or decrement the catering in quote time when you touch the up and down arrows on the Adjust Quote screen. ***Recommended Configuration:*** 30 minutes.
- Define the **Prep Time Increment** in minutes to increment or decrement the prep time when you touch the up and down arrows on the Adjust Quote screen. ***Recommended Configuration:*** 1 minute.
- Define the **Labor Time Increment** in minutes to increment or decrement the labor time each you touch the up and down arrows on the Adjust Quote screen. ***Recommended Configuration:*** 30 minutes.

Elements

Enables you to specify the quote time elements that appear on the Adjust Quote screen. Use the Add button to select quote elements to display on the Adjust Quote screen. ***Recommended Configuration:*** Match, with the order modes defined on the **Maintenance > Aloha Takeout Settings> Order Modes** tab.

All Orders Tab

All Orders, introduced in v1.2. Both pick-up and delivery orders appear on a single screen. This helps customers view all orders in the system regardless of type, similar to how orders appeared in v1.1. The All Orders screen allows the management of pick-up orders, however, delivery orders may only be assigned and dispatched from the Dispatch screen.

Figure 3 - 45 Takeout Settings, Panel Options, Customer Selection

- Define the **Auto search timeout** (**seconds)** of inactivity the system waits before automatically performing a search for criteria already entered. ***Recommended Configuration:*** 1 second.
- Determine which **Columns** and the order in which they appear on the All Orders screen.

    1. Click **Add** and select the column **Type** from the drop-down list.
    2. Click **OK** to enable the column on the All Orders screen.
    3. Use **Move up** and **Move down** to organize the columns from left to right as they appear on the Customer Selection screen.
    4. Click **Save**.

See the Aloha Takeout Reference Guide for column definitions.

Delivery Fees

The options available on this tab enable and support the Delivery Fees feature. Use these options to select and configure fees you want to add to delivery orders, based on several different criteria. Multiple delivery fee calculations may be enabled (stacked) to meet operational needs. For example, if you charge $1.50 per delivery, plus .10 cents per mile, enable both the 'Flat Amount' and the 'Distance From Store' options.

Notes Delivery fees calculate only on ATO orders using the "Delivery" order mode.

Use delivery fees to offset operational costs associated with delivery orders. These include packaging, utilities, and driver fees. Delivery fees are recognized as store revenue and reflect in the 'Order Mode Charges' section of the sales report, when configured. Driver reimbursement is not calculated based on delivery fees, however, you can configure delivery fees to cover driver fees. See "Create Employees" on page 2-22 for more information on configuring driver fees.

When enabled, Aloha Takeout calculates delivery fees based on the configured options. The system uses Aloha Connect to pass the delivery fee to the Aloha POS. Changes to the check total or customer address information may impact the delivery fee. Aloha Takeout recalculates and updates the POS when you edit and finalize the check.

Employees, with **Can Adjust Order Mode Charges** enabled, can adjust delivery fees.

- Touching 'Edit Guest' from any ATO screen allows authorized employees to set the delivery fee for a specific customer. This overrides the system calculated delivery fee.
- Touch 'Delivery Fee' on the Order Details screen allows authorized employees to override the Aloha Takeout calculated value for a selected order.
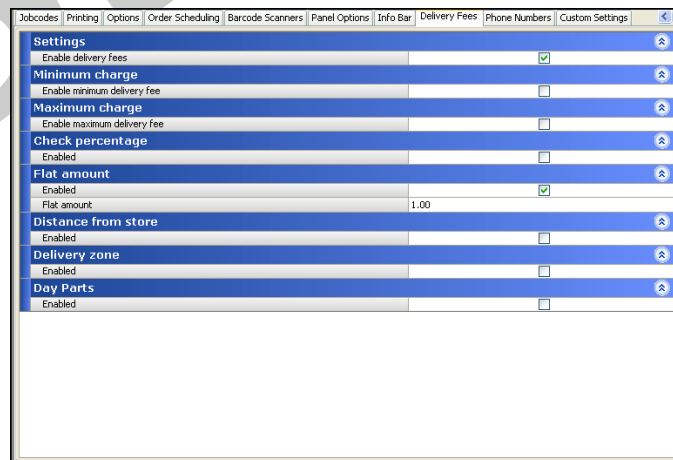
Figure 3 - 46 Takeout Settings, Delivery Fees

To configure delivery fees:

1. Select **Enable delivery fees** to activate the delivery fee feature. Other delivery fee options appear when enabled. Select one or more of the following delivery fees based on your operation needs.

   • Select **Enable minimum delivery fee** and to cover standard operational costs associated with delivery. This is designed to work with variable mileage based delivery fees, such as check percentage and distance from store , or when a variable fee is stacked as part of a delivery fee calculation. Aloha Takeout overrides the calculated delivery fee and sets the delivery fee at the defined minimum, if the calculated delivery fee is below the defined **Minimum delivery fee amount (in dollars)**.

   • Select **Enable maximum delivery fee** to define the maximum delivery fee amount that a customer would be charged to maintain customer satisfaction. This is also designed to work with variable mileage based delivery fees, such as check percentage and distance from store , or when these are stacked as part of a delivery fee calculation. Aloha Takeout caps the delivery fee to the defind **Maximum delivery fee amount (in dollars)**.

   • In the 'Check percentage' group bar, select **Enabled** to have the system calculate the defined **Check percentage** on the subtotal of each delivery check.

   • In the 'Flat amount' group bar, select **Enabled** to have the system add the defined **Flat amount** to each delivery check.

   • In the 'Distance from store' group bar, select **Enabled** to have the system calculate the delivery fee based on the defined **Distance from store (based on mapping)** value multiplied by the distance from the store to a delivery address. Aloha Takeout establishes the distance using the mapping application or the defined **Distance** value configured in the Delivery Area, Zone, Neighborhood, or Steet. Select the **Distance unit**, 'Mile' or 'Kilometer', from the options.

   • In the 'Delivery zone' group bar, select **Enabled** to have the system pass the 'Delivery' fee configured in **Maintenance > Takeout Configuration > Delivery Areas > Zone** "Delivery fee" option for each zone. Type the **Delivery zone default fee** to pass the defined value if delivery zone fees are enabled, yet a delivery fee is not defined for the zone associated with a customer's address.

   • In the 'Day Parts' group bar, select **Enabled** to have the system pass the defined amount depending on the POS day part in effect when a delivery order is placed. Use the arrows to select **Day Parts** from the Available frame and move them to the Included frame. Day parts are defined in Maintenance > System Settings > Day Part. Type the delivery fee **Amount** for each day part included.

Aloha Takeout delivery fees require POS version 6.7 or later, to pass information through Aloha Connect.

If using delivery fees with a prior POS version, configure delivery fees in Maintenance > System > Order Modes > Order Mode Info tab. We recommend selecting 'Order Items Prior to Confirmation (Order Summary Screen)' for the POS to calculate the order mode charge upon order, prior to Aloha Takeout displaying the confirmation screen.

Phone Numbers

Aloha Takeout allows easy configuration of U.S. phone number formats, as well as the ability to define phone formats for other areas of the globe. The' Default Phone Type' and 'Require Phone Number For Customers' settings are moved to a new tab in Maintenance > Takeout Configuration > Takeout Settings named "Phone Numbers".

U.S. Aloha Takeout installations in less populated regions can benefit from the 'Default Area Code' functionality. For towns that typically have one area code for both land and mobile numbers, this can reduce the phone entry to 7-digits. Installs with a larger customer base may turn this off to enter full 10-digit phone numbers with varying area codes.

Non-U.S. installations can benefit from varying phone number layouts. This allows sites to configure varying area code and local number digits. Sites can also define multiple unique phone formats if there are local and regional variances to the type of phone numbers a customer may use.

Searching

To further streamline the ATO user experience, the Primary Format attribute is provided to help assist ATO in displaying a phone number as it is typed into the guest search bar on the Look Up screen. For example, with the above configuration, if the user types "02012345678", "(020) 1234 5678" will be displayed in the search text window.   If the user wishes to search for a number by its local part only or for a number with a different length area code, the procedure is no different. When the user types a numeric string, say for example "12345", the database will search for local numbers that begin with 12345 as well as all numbers where area code + phone number begins with 12345. Note that this concatenated searching will only be done in sites where the area code length varies. In a fixed-length-area-code site such as, most of North America, the search will revert to the current, more efficient, method of searching for local numbers the begin "12345" and searching for area code "123" with a local number beginning "45".

As for auto-searching, there is a current behavior outside of the popular auto-search timeout, where the search will be done automatically once the valid number of digits is entered. Under the new configuration, if you are hiding the area code it will do a search once you provide the digits needed for the default area code's local-digit pattern. To escape this and search by an area code + a full number, the user can place the area code in parentheses, in which case the search will not be done until enough digits are entered for a full matching number format. In all cases of the number-of-digits-based auto search, ATO will automatically launch a new guest entry dialog if the search yields no results.
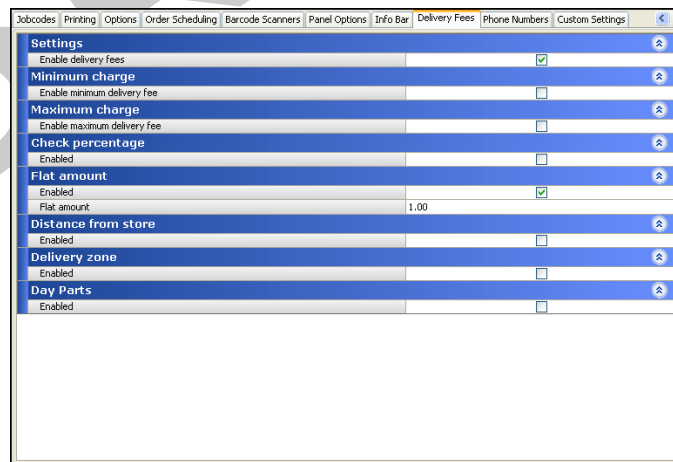
Figure 3 - 47 Takeout Settings, Phone Numbers

U.S. Operations

- Select the **Default Phone Type** from the drop-down that applies to the majority of customers that call the store for orders. For example, if the site is located in a residential area, set the default phone type to "Home". The default phone type is applied to the customer record for the entered phone number unless the user manually changes the type.

- Enable **Require Phone Number** to force order takers to enter a phone number when adding a new customer to the database. The phone number is validated based on the phone format to require the correct number of digits. **Recommended:** Enabled.
- Select the **Number phone digits** for telephone numbers in your area from the drop-down. When the defined number of phone digits in entered in the search bar and ATO does not find a match, the express guest entry screen appears to enter additional guest information. This option requires **Enable Express Customer Entry** be enabled to function.
- Enable **Require extension for guest office phone numbers** to force order takers to enter an extension when entering an office phone number. A dialog box is displays to remind order takers to enter the office extension if not present. This may be by-passed by typing "no" in the extension field. Enable this option if the site is located in a metropolitan or commercial area where office customers tend to have extensions.
- For smaller communities:

  - Type the **Default Area Code** if consistent for most customers. With the rapid adoption of mobile phones this option is not practical except in small communities.
  - Enable **Pre-populate default area code** in small communities where the majority of the customer base has a single area code for both home, office and mobile numbers. When enabled, this setting leverages the area code digits entered in the 'Default Area Code' field. This save screen touches by only entering the local number.

Figure 3 - 48 Pre-Populate Default Area Code

  - This is another setting primarily targeted at small communities with a single area code. In these communities that communicate 7-digit (local number) phone numbers, enable **Hide area code if equal to default** to reduce excess screen information and simplify phone numbers. When enabled, if the area code of a customer's phone number matches the default, the area code is not displayed on various ATO screens including the Lookup, Pick Up, and Order Details screens. Only the 7-digit local number is displayed.

- Enable **Use default U.S. phone format** to force the (AAA) LLL-LLLL format, where AAA=area code and LLL-LLLL= the local number (exchange – extension). When enabled, the 'Phone Number Layouts' frame is disabled. This helps simplify and minimize configuration for U.S. installations. If there is a need to use a different format, clear **Use Default U.S. Phone Format** and configure the Phone Number Layouts. **Recommended:** Enabled for U.S. installations, cleared for non-U.S. installations.
- Enable **Area code must start with** for countries where all area codes start with a given number or sequence of numbers by convention. This mandatory area code start will not be editable in the phone number control. This option is only available when the **Use Default U.S. Phone Format** option is cleared.

Phone Number Layout Group Box (Non-U.S. Operations)

Allows installations outside the U.S. to create regional specific phone formats to match local telephone infrastructure. Multiple phone number layouts can be defined to address mobile or other phone formats that may call the site. The 'Phone Number Layouts' frame allows the addition, editing, and deletion of phone formats.

To create a new phone number layout:

1. Click **Add** to create a new phone number layout line.
2. Type a **Name** that applies to the each format can help identify possible differences.

3. Type an **Area code prefix** using capital "A"s, set the number of digits in the area code. Symbols, like "(" and ")",may be added for user identification the phone number appears in ATO.
4. Type the **Layout base** using capital "L"s to set the number of digits in the phone number. Symbols, like a hyphen, may be used to separate digits for user identification when displayed in Aloha Takeout.
5. Select **Enabled** to use the format for phone searches. The phone format is also available when adding new or editing existing customers.
6. If you have multiple phone number layouts, enable **Primary Format** on the phone layout that applies to the majority of customer phone numbers that order from your site. The selected 'Primary Format' is used when adding new or editing existing customers.

> With special configuration, Aloha Takeout supports international telephone numbers. Contact a member of the NCR team for help with this configuration.

Custom Settings

Use the Custom Settings tab to add values that are not in the CMT, but need to be written to the AlohaToGoConfig.xml for the Aloha Takeout FOH to read. These may be dormant, customer specific, or pre-release options. Custom Settings may be added, edited or removed in Custom Settings. In most cases you will need to work with the NCR team to determine the XPath, Element Name, and Element Value for the custom setting.

To create a custom setting:

1. Click **Add** to create a new line in the Settings frame.
2. Type an **XPath** to define the section in the AlohaToGoConfig.xml where the custom setting is written. Element names must be in the proper section in order for ATO to read and enable the function.
3. Type an **Element Name** associated with the function. This must match exactly in order for ATO to read and enable the function.
4. Type an **Element Value** to define how the function behaves (true, false, numeric amount, etc.).
5. Click **Save**.

Delivery Areas

Aloha Takeout has functionality that will allow sites to manage delivery orders by specific delivery areas based on delivery zones, streets (may be sub-divided), and neighborhoods. Delivery area configuration is located in **Mantenance > Takeout Configuration > Delivery Areas**.

To configure a Delivery Area:

Manager Access Requirements

Within the Aloha Takeout Configuration, enable **Can Override Delivery Area Restrictions** for any Job Codes allowed to override delivery area restrictions.
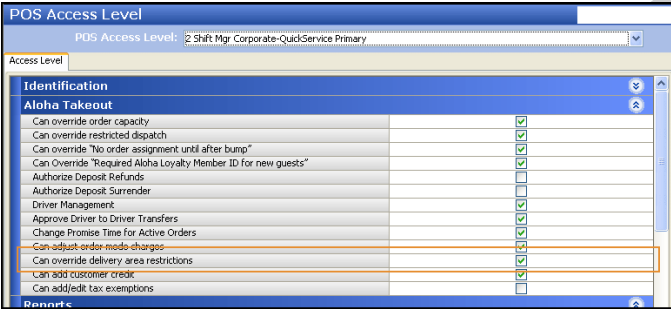
Figure 3 - 49 Labor, POS Access Level

The delivery area is managed from the configuration management tool in **Maintenance > Takeout Configuration > Delivery Areas**.
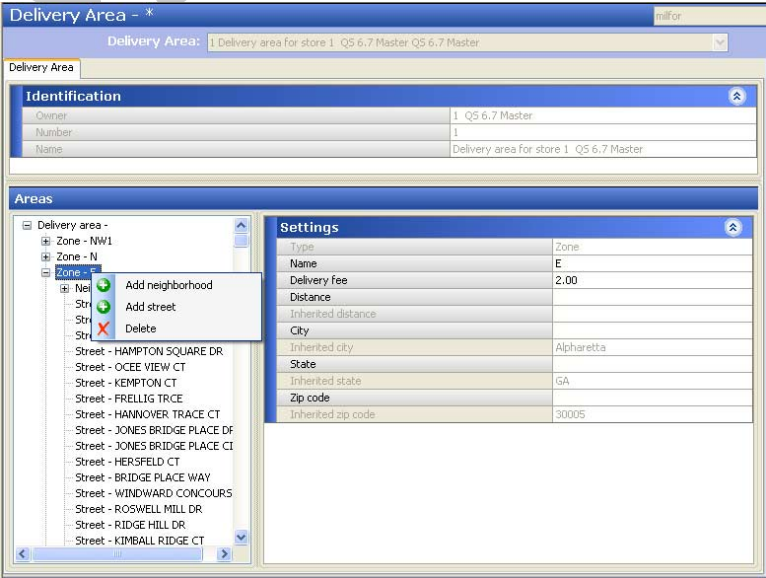
Figure 3 - 50 Delivery Areas

Delivery Area

Delivery areas are typically unique to each restaurant. Franchise rights, geological boundaries, and drive time limits affect a site's delivery area. Drive time limits are typically based on driver efficiency, speed limits, and food hold times, to provide a customer the freshest delivered product and satisfaction possible. A delivery area usually looks like an odd shaped polygon, radiating out from a site, bordered by what is referred to as a 'geofence.'

Key Points:
Create a Game Plan: As a best practice, answer the following set questions before attempting to configure delivery areas:

1. **Zones** — Will a site use them for delivery fees or dispatch organization? If so, what are the zones?
2. **Neighborhoods** — Will a site use them? If so, will the neighborhoods be a part of a zone (not required). Map out the neighborhoods so that you know which zone each neighborhood belongs to.
3. **Streets** — Is there an import file available for streets, can you create an import file, or will you manually enter each street.
4. **Drag 'n' Drop** — Drag 'n' drop is supported when editing Zones, Neighborhoods, and Streets.

Delivery Area Components

The contents of a delivery area are made up of the following:

Streets — A long street may extend beyond the geofence, yet is limited by the street range. Two different stores may serve streets that run along the geofence line. Store A may deliver to the odd side of the street and Store B delivers to the even side. Streets may be sub-divided, if they cross zones or neighborhoods. Although you can add additional streets in growing areas, street information is typically static and available from a number of sources, including maps, the postal service, and other geographic suppliers.

Zone — A logical grouping of streets and neighborhoods. Zone boundaries, names, and fees are completely free-form. There is no standard or source that provides zone information on a store-by-store basis. Sites and corporate offices are generally involved in determining the shape and content of a zone. Geographical obstacles, distance radius, drive time, and general compass direction are commonly used to define zone boundaries and content. Zones are used to:

1. Efficiently assign orders to drivers to be delivered in the same general direction or vicinity.
2. Vary delivery fees in incrementing amounts depending on the distance from the store.

Neighborhoods — Although no Aloha Takeout routing or address logic is associated with neighborhoods, they provide another layer to help organize a vast delivery area into more manageable blocks. Neighborhoods are not required. We recommend not configuring neighborhoods unless they help organize the delivery area.

Defining the Delivery Area

Sites may choose to define their delivery area. A site manager may drive their delivery area or use a map or computer to define included streets and the street number at delivery area boundaries. This is often labor intensive; however, it does not require purchasing services or data from another company. The site usually manually enters and maintains the delivery area data.

Manually Creating a Delivery Area

Zone Configuration

Zones define a group of streets and neighborhoods. Zones may be used to define a delivery fee for the contained addresses. Zone information also appears on the Dispatch screen to help group orders to be delivered to the same general area to improve delivery efficiency.

Please follow these steps to set up Zones:

1. To add a zone, click the **Zone** button from within the Delivery Area configuration module.To add a 'Zone', right-click on the Delivery area and select 'Add zone' from list.
2. Configure the zone **Name, Delivery Fee, Distance, City, State, and Zip**:
   a. You only need to enter a 'Delivery fee,' if a site plans to use "Delivery Fees by Zone" functionality.
   b. Distance is not a required field. A zone distance is used as a default in the event that mapping cannot calculate the address distance. Distance may also be defined at the street level. ATO applies the distance based on the following hierachy, from highest to lowest:

   - Distance determined by the mapping application.
   - Street.
   - Neighborhood.
   - Zone.
   - Delivery Area.
   - Default Distance from store (based on mapping) option in Delivery Fees.
   - City, State, and Zip code are not required fields.

   - The Melissa Data import contains city, state, and ZIP information for each street. This information is imported as part of the Import Delivery Area Data process at the Street level.
   - Zone.txt does not contain city, state, and zip information and therefore is not imported as part of the Import Delivery Area Data process. This information can be entered in each zone manually following an import.
   - The 'default' city, state, and zip on the Customer Information tab is used when this information is not imported or entered at the street, neighborhood, or zone level.

3. Repeat **this procedure** for subsequent zones.

Neighborhood Configuration

Neighborhoods are not a required configuration, but can help group streets, if necessary. There is no delivery fee logic tied to neighborhoods. Skip this step, if you are not using neighborhood grouping.

Please follow these steps to set up Neighborhoods:

- To add a 'Neighborhood', right-click on a Zone and select 'Add neighborhood' from list.

Street Configuration

Create streets to define your delivery area. Streets may be subdivided if they cross zones or other boundries. In addition, street information may be limited to the odd or even side of a street if your site only delivers to one side. Defined streets also appear when adding an address to a customer using the type-ahead address feature. Order takers may quickly select an address based on the street number and initial street name characters entered.

Please follow these steps to set up Streets.

1. To add a 'Street', right-click on the Delivery area, Neighborhood, or Zone and select 'Add street' from list.
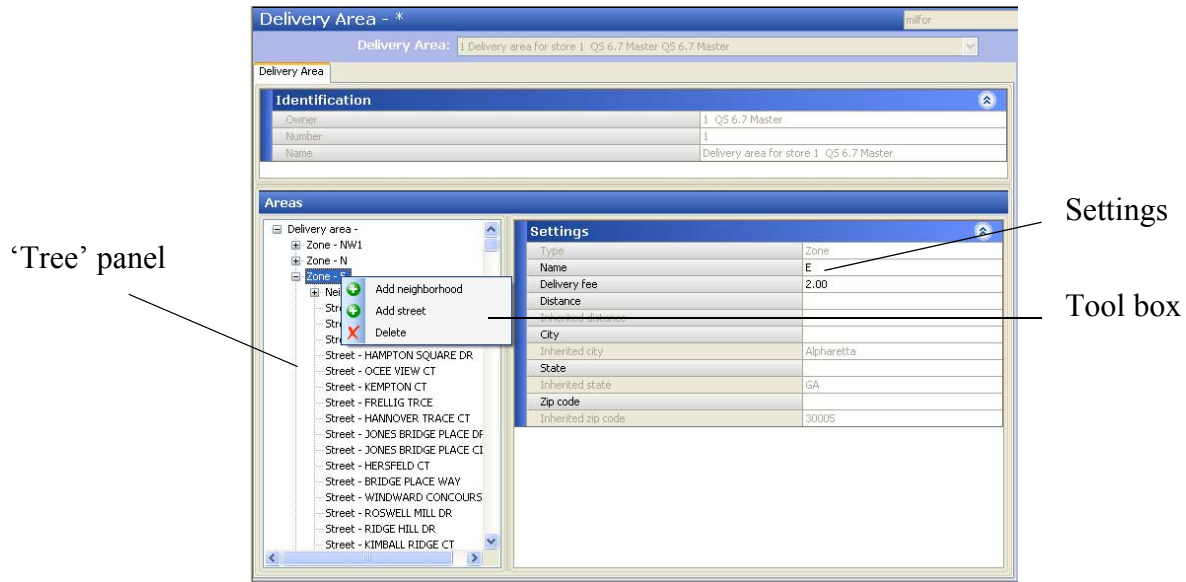
Figure 3 - 51 Delivery Areas Components

2. Configure the zone **Name, Delivery Fee, Distance, City, State, and Zip**:
   a. You need to enter a 'Delivery fee,' only if the site plans to use "Delivery Fees by Zone" functionality.
   b. Distance is not a required field. The distance is used as a default in the event that mapping cannot calculate the address distance.
   c. City, State and Zip are not required fields.

   - The Melissa Data import contains this information for each street.
   - Zone.txt does not contain city, state, and zip information. If the information varies by zone, enter it here.
   - The 'global' city, state, and zip on the Site Info and Customer Information tab is the "Default Customer..." Inherited value.

3. Repeat **this procedure** for subsequent zones.

System Parameters

Aloha Takeout communicates with the Aloha POS system through Aloha Connect, using options located in Takeout Configuration > System Parameters. These options specify IP addresses, port numbers, and more. Use the default values, unless specifically instructed to make changes by your NCR team member. The only change you need to make on this tab is to type the IP address of the Aloha BOH file server in the Service Host text box. Since the BOH IP address varies from site to site, use the 'Version' function to set the Aloha Takeout system parameters for each site.
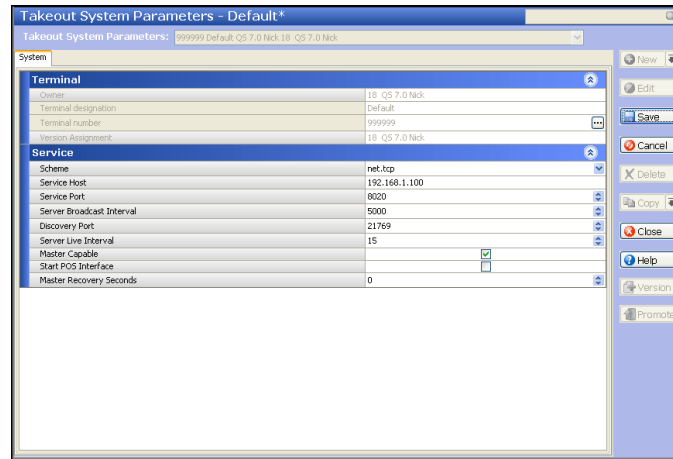
Figure 3 - 52   Takeout Configuration, System Parameters

- Type the **Service Host** IP address of the Aloha network. The Aloha Takeout service broadcasts and accepts messages across this IP. If the IP address is incorrect or the network adapter is not at the top in the Connections frame, the terminals will not be able to connect to the service.
- Clear **Start POS Interface** unless you are running Aloha Online. This option automatically starts and restarts a UI-less instance of Iber(qs).exe on the BOH computer to accept orders from Aloha Online. If enabled to integrate with Aloha Online, set the **Site Key** to accept credit card payments. See "Aloha Data Protection Tool" on page 5-9.

Refreshing Data

With some configuration changes, you must restart the Radiant TakeOut and Delivery Windows service, to reread the configuration. This applies to enabled options that are managed by the service on the BOH. These include:

- Caller ID
- Bixolon label printing
- Mapping
- House accounts
- Aloha Takeout End-of-Day
- Credit card storage
- Aloha Kitchen interface
- Start POS interface
- Service Host IP change

Changes you make to Aloha Takeout configuration do not take effect until the FOH Aloha Takeout client synchronizes the AlohaToGoConfig.xml from the BOH. The FOH Aloha Takeout client reads the synchronized AlohaToGoConfig.xml, output by a CMT refresh, and applies functionality based on the configuration. We recommend performing manual data refresh operations, when necessary, or waiting for POS EOD. In most cases, this restarts both POS and ATO on the terminal during log off\on or reboot.

> If using a batch file to restart the POS, you need to use the "KillAlohaToGo.exe" utility in the batch file. This utility is available on the Aloha Update portal.

4 Installing ATO on the FOH Terminals
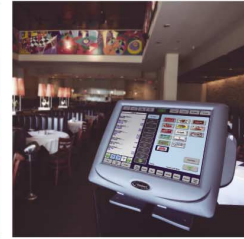
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After installing Aloha Takeout on the Aloha BOH file server, and configuring the Aloha POS and Aloha Takeout to work together, the only task remaining is to install Aloha Takeout on the FOH terminals you intend to use for takeout or delivery orders.

Installing ATO on the FOH

> ⚠️ **CAUTION**
>
> *It is very important to install Aloha Takeout on the Aloha BOH file server, and to minimally configure the Service Host option and network to match. This allows the Aloha Takeout FOH client to sync with the BOH. Subsequent edits are read when the client restarts, provided it is able to connect to the service.*
> *Failure to accomplish this can require manually editing the Service Host setting in the AlohaToGoConfig.xml on each terminal, to enable them to connect to the Aloha Takeout service running on the file server.*

To install Aloha Takeout on the Aloha FOH terminals:

1. Access the **AlohaTakeout [x.x.xxx.msi]** on a USB drive, mapped drive, or copy the file to the drive on the terminal.
2. Double-click the **installation file** to begin the installation process on the terminal.
3. Read the **EULA** and click the **"I accept the terms in the License Agreement"** check box.
4. Click **Next**.
5. Click **Next** in the installation wizard until the **Installation Type** step appears.
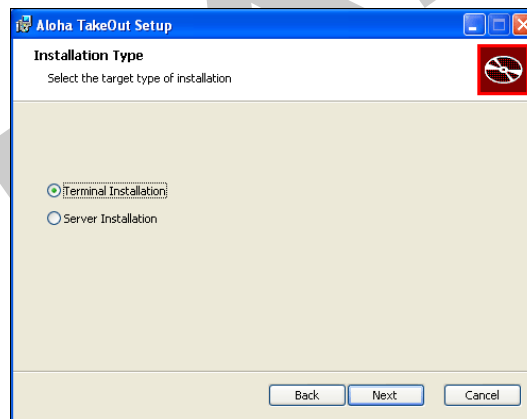
Figure 4 - 1 Aloha Takeout Setup, Installation Type

6. Select **Terminal Installation**, if Aloha Takeout is already installed on the BOH file server, and if all required configuration is complete, specifically the Service Host option.
7. Click **Next** and verify the new **Takeout** directory is the default destination. Browse to this directory, if it is not.
8. By default, Aloha Takeout installs to the '%Bootdrv%\Aloha Takeout' folder. If the installer detects a prior Aloha Takeout installation, it installs to the previous directory unless changed at this step.
9. Click **Next** and follow the prompts to the end of the installation process.
10. Click **Finish** to complete the installation.

As a best practice, let the Aloha EOD process restart all terminals, after installation is complete, to propagate Aloha Takeout configuration from the file server to the terminals, in much the same way the Aloha POS uses a data refresh to transmit database changes to all terminals at the same time.

Recovering from Out-of-Sequence Installations on FOH Terminals

If you inadvertently install Aloha Takeout on one or more FOH terminals before completing configuration of the Aloha POS (Quick Service or Table Service) and Aloha Takeout, Aloha Takeout may not function properly in the site. This condition is usually caused when the server has multiple NICs and the 'Service Host' is set incorrectly in the AlohaToGoConfig.xml file on the terminals. The terminals, because of the incorrect configuration, never look outside themselves for the Aloha Takeout Windows service.

To correct mis-configuration caused by prematurely installing Aloha Takeout on terminals:

1. Navigate to **Maintenance > Takeout Configuration > System Parameters** on the Aloha BOH file server.
2. Set the **Service Host** option to match the IP address of used by the 'Aloha' network.
3. Click **Save**.
4. Confirm the network binding order with the 'Aloha' NIC at the top in the **Connections** frame.

    Use the 'arrow' buttons to move the selected NIC to the top, if necessary.

5. Click **OK** to save.
6. Restart the "Radiant Takeout and Delivery" Windows service to begin broadcasting on this IP.
7. Locate AlohaToGoConfig.xml on the BOH file server. This file resides in the %ATOPath%\Data directory.
8. Copy the AlohaToGoConfig.xml from the file server to the %ATOPath% directory on each Aloha Takeout terminal.
9. Refresh or manually restart these terminals to make the new information take effect on each one.

5 Aloha Takeout Utilities

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Several utilities are available as part of the Aloha Takeout installation. Some of these utilities are intended for daily use, while others you may use only one time, if ever. This section describes utilities that you may find helpful after configuring Aloha Takeout, and again at the end of your testing period.

Shortcuts Possibly Needed in an Aloha Takeout Installation

The installation process for Aloha Takeout creates no desktop icons or shortcuts to the Aloha Takeout program files or utilities. You may need to create any or all of the program shortcuts listed in the table below, based on your corporate or site needs. Some of these program files are utilities seldom used, if ever, while others may be helpful to you on a daily basis.

Program Name	Generic Path	File Name	Function
Console (optional)	C:\Bootdrv\Takeout\Bin\	TakeOutConsole.exe	Utility for clearing inaccessible orders.
Customer Organizer (recommended)	C:\Bootdrv\Takeout\Bin\	TakeOutCustomerOrganizer.exe	Utility for merging or deleting duplicate customer records, or for deleting false customer records.
Data Protection Tool (recommended, used 4 times a year)	C:\Bootdrv\Takeout\Bin\	TakeOutDataProtectionTool.exe	Utility for creating or replacing a site key for securely handling payment card information.

Export Data from Aloha Delivery/ Frequent Buyer

If you have been using Aloha Delivery/Frequent Buyer in your site, you can use the Data Import utility to import the customer data from that database to your Aloha Takeout installation. This import provides welcome continuity for you and your customers between the two systems. To accomplish this import, you will need the following:

- The Delivery/Frequent Buyer database file, DSData.mdb.
- DataImporter.exe, from the \Aloha Takeout\Bin directory.

The two Aloha Takeout data import files are available in the %ATOPATH%\Bin directory.

To export customer data from the Delivery/Frequent Buyer database:

1. Use **Microsoft Access**® to open the Delivery/Frequent Buyer database, **DSData.mdb**. The default path to this file is %Iberdir%\BackOffice\DS.
2. Select **Table view** to visualize the tables in the database file.

3. Select the **Customers** table.
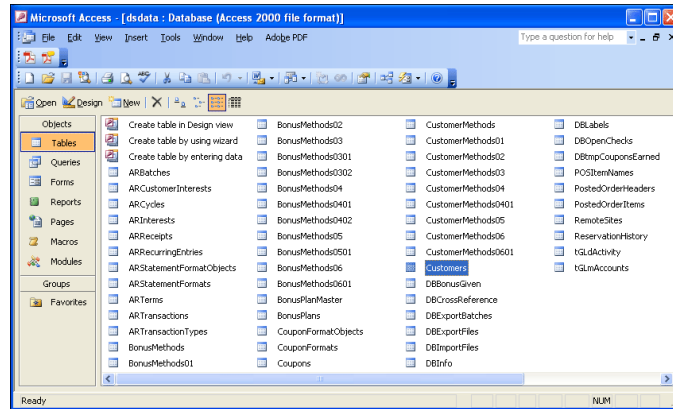
Figure 5 - 1 DSData.mdb in MS Access, Customer Table Selected

4. Select **File > Export**.
5. Browse to a **staging directory** to store the **new .csv file**.
6. Select '**Text files (*.txt, *.csv, *.tab, *.asc)**' from the **Save as** drop-down list.
7. Type a **file name** ending in '.csv' in the text box (Customers.csv, for example).
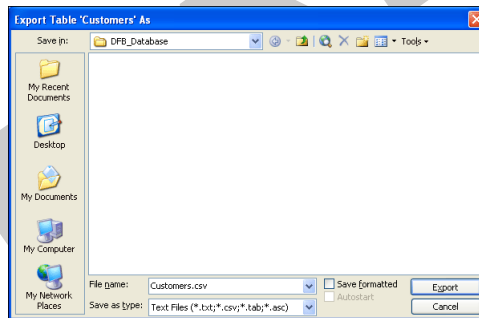
Figure 5 - 2 Creating the Comma-Delimited Database File

8. Click **Export** to configure the file creation wizard.
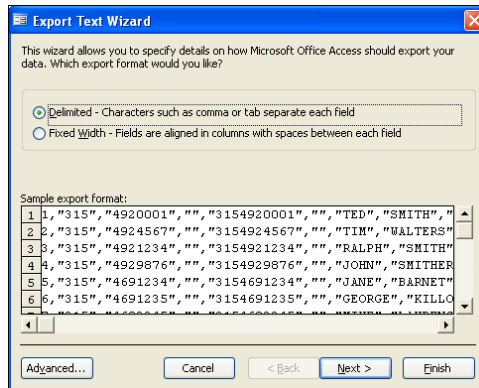
Figure 5 - 3 Configuring the Export

9. Select the '**Delimited...**' option, and click **Next**.
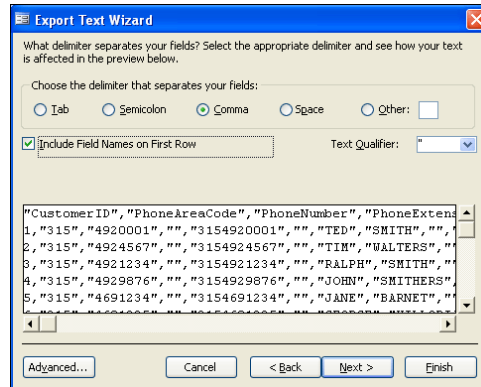
Figure 5 - 4 Configuring the Export

10. Verify the '**Choose the delimiter...**' option is set to **Comma**.
11. Select '**Include Field Names...**' and click **Next**.
12. Click **Finish** to close the Export Text wizard, completing the data file export.

Data Importer

The DataImporter can be used to import customer data. The most used imports are the "DeliveryFB" and "Generic Customer."

DeliveryFB — Imports the Customers.csv exported customer table from the DSData.mdb (from the steps defined above).

GenericCustomer — Allows importing a customer information from most sources. If you are able to export customer information into a .csv or .xls format, you can copy and paste fields into the Generic-Customer.csv file, using Excel, and import this file into Aloha Takeout.

1. Stop the **Radiant Takeout and Delivery Windows** service.

2. Launch **DataImporter.exe** from the %BootDrv%\Aloha Takeout\Bin directory.
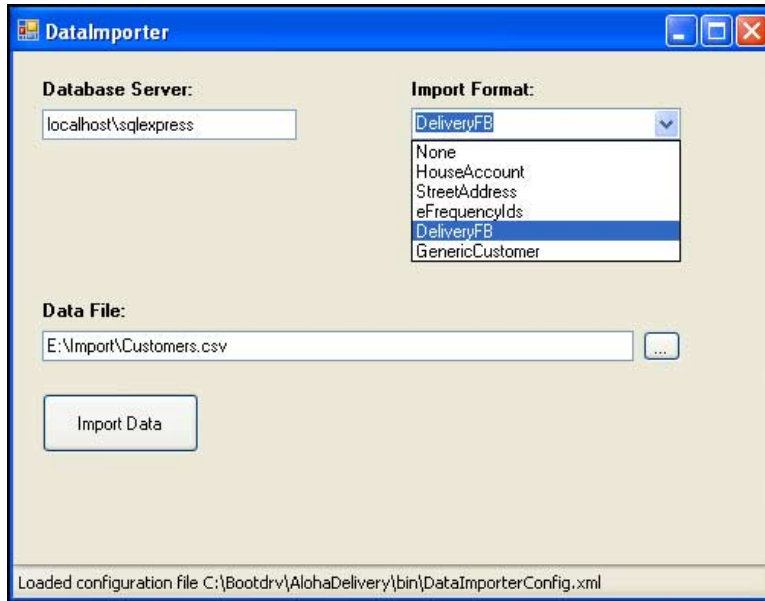
Figure 5 - 5 User Interface for DataImport.exe

3. Enter **localhost\sqlexpress** as the **Database Server name**.
4. Select **DeliveryFB Data** as the **Import Format**.
5. Browse to the location of the **Customers.csv**, and select the file.
6. Click **Import Data** to complete the data import. The number of successfully imported records dialog should appear.
7. Click **Ok** to dismiss.
8. Restart the **Radiant Takeout and Delivery Windows** service.

Customers in the Delivery/Frequent Buyer database now appear in the Aloha Takeout database.

The **HouseAccout** import is only used when **Enable Aloha integration** is cleared, and house accounts are created outside of Aloha POS.

Use the **Import Delivery Area Data** utility in the CMT, instead of the **SteetAddress** import in the DataImporter.

Aloha Takeout Backup

The Aloha Takeout BackUp allows you to save a copy of the Aloha Takeout SQLExpress database in the event of a computer failure. In the event the BOH computer crashes or the database becomes corrupt, you can restore the SQL Express backup.

Recommendations:

- Use Windows Scheduler to schedule a backup of the Aloha Takeout database at least once a day. Schedule the back up for five minutes prior to the scheduled Aloha Takeout End-of-Day. This is similar to an Aloha dated subdirectory and contains all the activity for the prior day.
- Save the back up off the local drive, such as to a jump drive, CD-ROM, or network storage.

Using the Aloha Takeout Backup:

Include the backup statement below in a batch file that you can run using Windows Scheduler (http://support.microsoft.com/kb/308569) or Aloha Winhook (See RKSID#5998).

Options:

/purge:<Days> — Removes any backups older than the defined number of <Days>.

/backup:{true|false} — Determines whether to run or not run the backup. If false, the backup will not run.

/database:<DatabaseName> — Specifies a different database name for the backup. By default, the backup tool backs up the AlohaToGo database. Use this switch to back up the training database (or any other SQL database).

/server:<ServerName> — Specifies the name of the file server. It is the same as <database name> that is used in the original tool. This setting is redundant but allows you to visually see what the setting is by the command being used.

/directory:<DirectoryName> — Sets the directory where you want the backup to be saved. Like the /server switch, this was already done in the original tool.

Command Line Formatting:

```
<path>\TakeoutBackUp /purge:<# days to store> /backup:True /database:<database name> /
sever:<sqlexpress instance> /directory:<backup path>
```

Examples:

```
[No Purge] — D:\Bootdrv\Aloha Takeout\Bin\TakeOutBackup" /server:localhost\sqlexpress
/directory: "D:\Bootdrv\Aloha Takeout\Backup
```

```
[Purge past 30 days] — D:\Bootdrv\Aloha Takeout\Bin\TakeOutBackup" /purge:30 /
backup:true /database:AlohaToGo /server:localhost\sqlexpress /
directory:"D:\Bootdrv\Aloha Takeout\Backup
```

Performing a Manual Backup of the Aloha Takeout Database:

You can manually perform a backup of the Aloha Takeout database at any time using SQL Management Studio Express 2005.

1. Stop the **Radiant Takeout and Delivery** service.
2. Launch **SQL Management Studio Express 2005**.
3. Connect to the **database**.
4. Expand the **Database option** to display the **AlohaToGo database**.
5. Right-click the **AlohaToGo database**.
6. Select **Tasks**.
7. Select **Back Up**.
8. Make sure there is **only one destination** in the Destination control.
9. Use **Remove** to remove **additional backup files**.
10. Select the **backup destinations**. Click the **'*ellipsis*'** to change the default backup location.
11. Enter the **backup name** in 'File name.'
12. Click **OK**.
13. Click **OK**. A successful message should appear.
14. Restart the **Radiant Takeout and Delivery** service.

Performing a Manual Restore of an Aloha Takeout Database:

You can perform a manual restore of the Aloha Takeout database using SQL Management Studio Express 2005.

- You should only restore the Aloha Takeout database at EOD. This is typically done when replacing the file server and restoring Aloha BOH functionality.
- Depending on when the Aloha Takeout database was backed up, you may want to Force EOD using the Takeout Console, to remove any active transactions that were in the database when the database was backed up.

To restore the Aloha Takeout database from a backup:

1. Stop the **Radiant Takeout and Delivery** service.
2. Launch **SQL Management Studio Express 2005**.
3. Connect to the **database**.
4. Right-click the **AlohaToGo database**.
5. Select **Tasks**.
6. Select **Restore**.
7. Select **Database**.
8. Select the **From Device**.
9. Click the ellipsis **(...)** button.
10. Click **Add**.
11. Browse to the **Back Up folder** on the local drive.
12. Click **OK**.
13. Confirm the **Backup location**.
14. Click **OK**.
15. Click **Restore**.
16. Click **Select a page** > **Options** in the upper left.
17. Enable **Overwrite the existing database**.
18. Confirm the **Restore the database files as:** selections for the mdb and the log file are correct on the current computer. The locations may be different, if the %ATO% path was different on the computer on which the backup file was created.
19. Click **OK**
20. Click **OK** on the successful restore message.
21. Restart the **Radiant Takeout and Delivery** service.

Aloha Takeout Console

You can run the Aloha Takeout Console from the BOH, to manually adjust orders. Click **Refresh Order List**, available on all tabs, to refresh the latest order information. The tabs support the following functions:

Orders Tab

Orders stuck on the FOH, because of configuration or other issues, may be forced closed using **Close Order**. *Recommend:* Correct configuration issues, as they arise, to prevent ongoing use of this.

Future Orders Tab

- Manually release future orders from the BOH using **Release Order**.
- Cancel future orders from the BOH using **Cancel Order**.
- Reactivate future orders released or cancelled in error using **Re-Activate Order**.

Exports Tab

The export file is used by MenuLink to manage orders based on booked future orders in Aloha Takeout. MenuLink imports item and order information associated with a reference ID for later updating, if needed. The Aloha Takeout End-of-Day process automatically creates the export file. The Takeout Console allows you to manually run the export upon demand.

- The **Incremental** export creates a .csv with any new or modified future orders since the last time the export was run. If several future orders are placed since the last End-of-Day export, click the Incremental button to create an updated .csv, including the latest information to add to the predictive order in MenuLink.
- The **Full** export creates a .csv file for all active future orders in the system. Use the Full export when adding MenuLink to a system or for other reasons that require a full file of future orders.

Aloha Data Protection Tool

The data protection tool manages the encryption keys for the Aloha Takeout product to protect stored credit card information, in accordance with the PCI-DSS specification.

Site Keys

To collect and store sensitive cardholder information, the Aloha Takeout application requires the presence of a site key. The process uses the site key to encrypt the sensitive data before storing the data in the database or transmitting it between client terminals and the server. When a customer wants to pay for a transaction with a stored payment card, Aloha Takeout retrieves this information, unencrypts it in the background, and passes it to the Aloha POS for use with Aloha EDC in the normal payment process.The site key is also required for online orders with credit card payments, even though the site may not be storing credit card information with their customers. Until you establish a site key in the system, you cannot enter cardholder information using the ATO application.

Some best practices for site key management are as follows:

- Use a unique site key at each location.
- Restrict access to site keys to the smallest number of employees possible.
- Store site keys in a secure manner.
- Document key management procedures and implement fully.
- Require key custodians to sign a form affirming they understand and accept their key-custodian responsibilities.
- Generate strong keys, using uppercase and lowercase letters, numbers, and symbols.

- Change the site key at least quarterly, documenting each change of the key.
- Destroy all copies of the old key.
- Establish split knowledge and dual control of keys. For example, give sequential parts of the key to three different people, so that they all have to enter their own part, in a specific order, to reconstruct the whole key. Three parts of an example key could be 'MarYhad&,' 'AliTTle42@,' and 'laMb95&3.' The entire key would consist of these three parts, typed sequentially:

MarYhad&AliTTle42@laMb95&3

- Prevent unauthorized substitution of the key.
- Replace keys known or suspected to have been compromised.

Takeout Data Protection Tool

The Takeout Data Protection Tool allows the key custodian to establish or change the site key for the Aloha Takeout site. The tool is installed as part of the ATO server installation.

After installing the Aloha Takeout product for the first time on the server system, the site administrator should run the Takeout Data Protection tool. Start the tool from a shortcut in the "Aloha TakeOut" group on the "Start" menu or from a similar shortcut on the desktop.
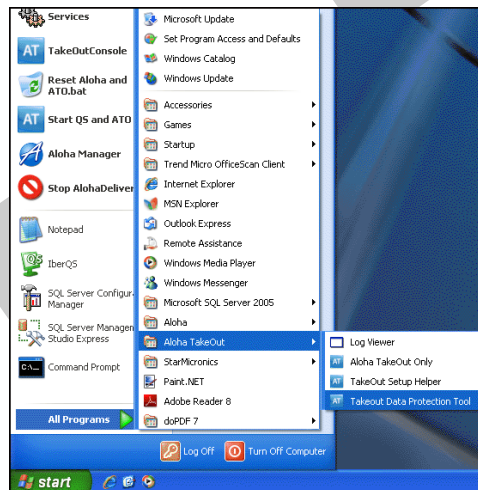
Figure 5 - 6 Data Protection Tool Shortcut

Storage and Rotation of Site Keys

The system stores site key information in the %ATOPATH%\DATA directory in an encrypted file called ATO_SK.dat. When you change the site key, the system changes the name of the existing ATO_SK.dat to ATO_SK1.dat and stores the new site key in ATO_SK.dat. When ATO needs to decrypt credit card information, it attempts to use ATO_SK.dat. If this fails, it tries ATO_SK1.dat, ATO_SK2.dat, etc. until it either decrypts or runs out of site key archives.

In most cases the %ATOPATH%\DATA directory should only contain one ATO_SK.dat file. When the Radiant Takeout and Delivery service is restarted, it goes through the stored credit cards in the SQL database and re-encrypts them with the new key. When complete, the system deletes ATO_SK1.dat, and any other archives.

Anytime you establish or modify a new site key, you must restart the Radiant Takeout and Delivery service and ATO clients, to allow the new site key to take effect.

Aloha Takeout v12.1 Implementation Guide

Establishing a new site key:

When running the Takeout Data Protection Tool for the first time, the main window appears with the Create Key button available for use.

1. Enter and re-enter the **new site key**.
2. After initially entering the site key, the Takeout Data Protection Tool requires you to enter the site key to perform any actions.
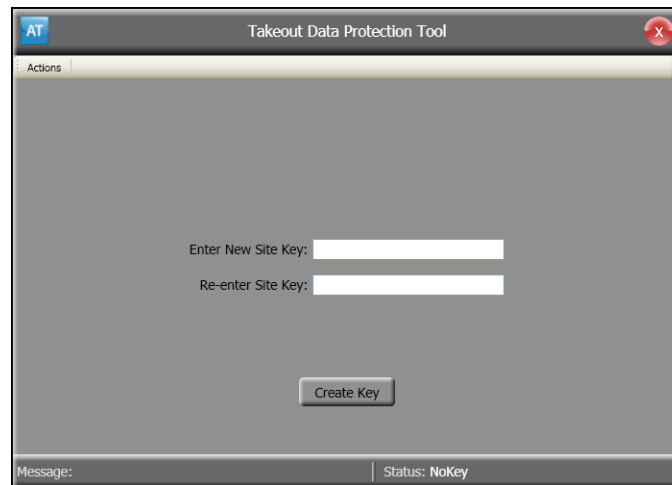
Figure 5 - 7 Data Protection Tool, Site Key Entry

Once established, the site key remains in effect until changed. Aloha Takeout provides full message support for any errors in key number entry that may occur.

> The site key resides in the encrypted file \Aloha Takeout\Data\ATO_SK.dat. If the site key is forgotten or becomes corrupt, you can delete this file and enter a new site key. If this becomes necessary, ***all*** stored payment card information becomes unavailable for future use. Contact your NCR team member for help, before you delete this file.

Changing Existing Site Key

If you want to rotate the key at a site periodically, you must enter the site key to unlock or select "Change Site Key" from the Actions menu.

The form for changing the site key is similar to the form for setting the initial site key. In addition to the two fields for entering the new site key, you first receive a prompt to supply the existing site key. When clicking 'Change Key,' the tool validates that the supplied existing key matches the value stored within the ATO system. The application also validates that both of the new key strings are identical. If the validation criteria are satisfied, the system saves the new key to the system. If either of the criteria fails validation, you receive a prompt to re-enter the keys.

To change the site key:

1. Launch the **Data Protection Tool**.
2. Type the **current key** in 'Enter Site Key.'
3. Click **Actions**.
4. Select **Change Site Key**.
5. Type the **existing site key** in 'Enter Current Site Key.'
6. Type the **new site key** in 'Enter New Site Key.'

7. Re-type the **new site key** in 'Re-enter New Site Key.'
8. Click **Change Key** to confirm the change.
9. Re-type the **new site key** in 'Re-enter New Site Key.'
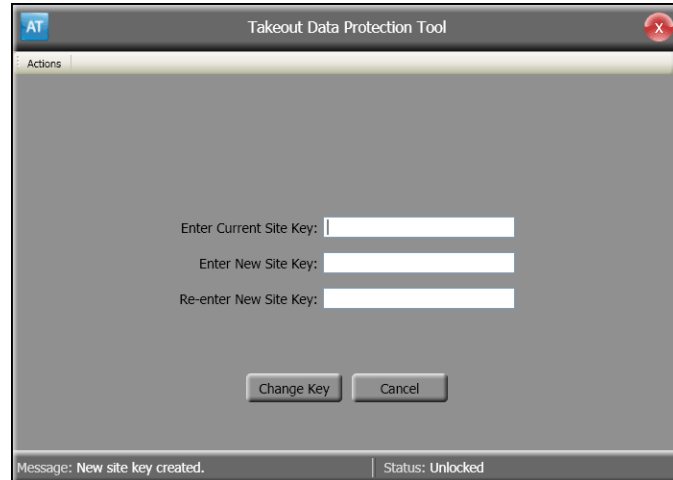
Figure 5 - 8 Data Protection Tool, Rotate Site Key

Clearing Credit Card Data

The Takeout Data Protection Tool also allows you to clear stored credit card information at a site. In the event you need to remove stored credit card information at a site, touch Clear Data.'

1. Launch the **Data Protection Tool**.
2. Type the **current key** in 'Enter Site Key.'
3. Click **Unlock**.
4. Click **Clear Data**.
5. Click **Yes** to confirm clearing all credit card information from the ATO database.
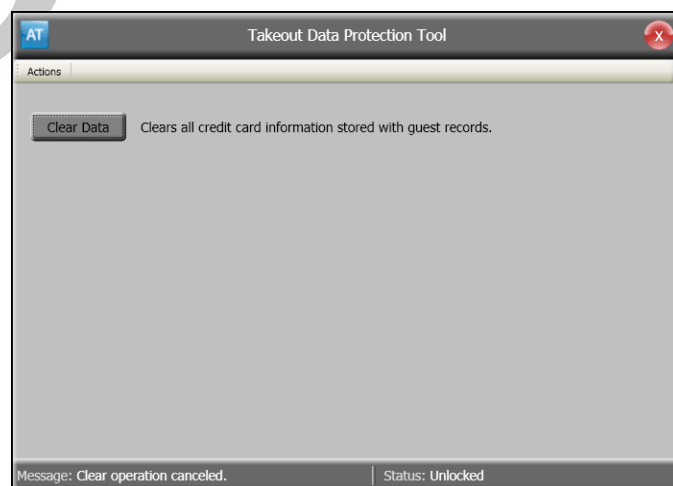
Figure 5 - 9 Data Protection Tool, Clear Data

Takeout Database Tool

Use the database tool to perform automatic functions on the Aloha Takeout database. This utility is only used during installation and before the store goes live, unless instructed by a support team member.

Create — Aloha Takeout creates the SQL Express database during the Server installation. If this step fails, the installation fails, so there is not a lot of need for this function. However, if the database is detached and deleted, or renamed by mistake for some reason, click 'Create' to create a new blank Aloha Takeout SQL database with the current schema version. If the Aloha Takeout service detects a database is attached to SQL Express, this button is not available.

Attach — Similar to Create, Aloha Takeout creates and attaches the SQL Express database during the BOH install. However, if the database is detached for some reason, click 'Attach' to browse to a database and attach it for use with Aloha Takeout. If the Aloha Takeout service detects a database is attached to SQL Express, this button is not available.

Upgrade — The Aloha Takeout installation process updates the database to the current schema version. In the event the database needs to be restored from a backup with a previous schema version, click 'Upgrade' to migrate the attached database schema to the current version.

- **Standard DB Ver.** displays the schema version of the attached version.
- **Training DB Ver.** shows the same for the 'training' database.
- **Upgrade Version** displays the Aloha Takeout schema version available based on the version of Aloha Takeout installed.

If the Standard or Training database versions do not match the Upgrade Version, they appear in red. Matching versions appear in green. Click Upgrade to migrate the databases to the upgrade version.

Reset — Clears all customer and order data from the database. Use Reset to clear all current and historical customer and order data entered during training before 'going live'.
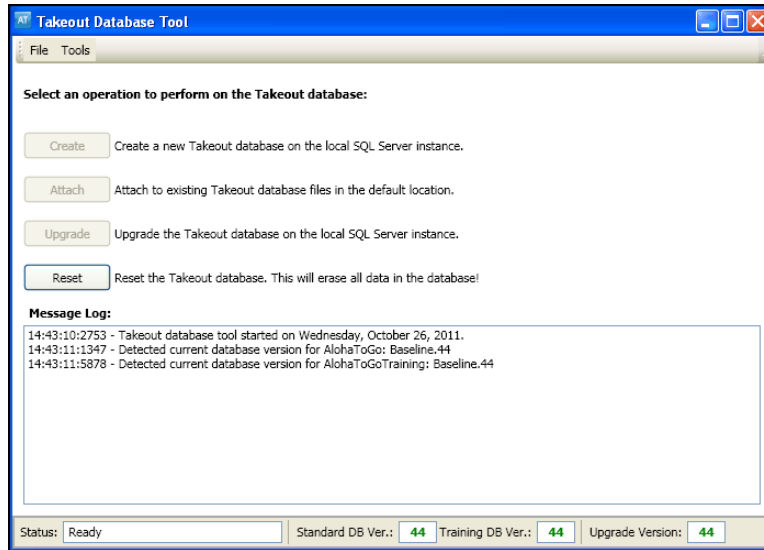
Figure 5 - 10 Takeout Database Tool

> ⚠ **CAUTION** Do not use the Reset function once the store is actively adding customers and creating takeout orders.

Aloha Takeout Customer Organizer

Use the Aloha Takeout Customer Organizer to "clean up" unwanted records in the database. The 'Enable Purge of Inactive Customer' and 'Check for Duplicate' options help minimize incomplete and duplicate records. Removing excess customer records improves the ability of the order taker to quickly locate and start an order for customers, and reduces the database size, for maximum efficiency.
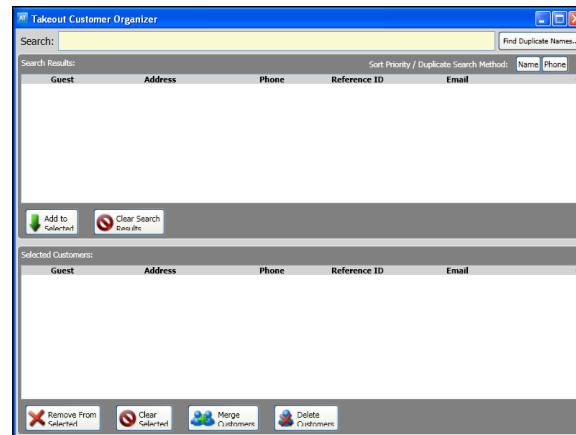
Figure 5 - 11 Customer Organizer

Features:

- Identifies potential duplicate customer records with matching first and last names.
- Merges selected records to a 'primary' record in the event duplicate records are created by mistake.
    - The number of visits is combined between the two records.
    - No other customer information is merged.
- Removes the selected customers from the database.

Search: — Enables the entry of a text string to use for searching the names in the database.

Find Duplicate Names... — Searches for possible duplicate records in the database.

Search Results — Displays a list of results from the search or selected from the possible duplicate names.

Duplicate names — A listing of possible duplicate names populated after clicking the Find Possible Duplicates button.

Selected Results — Entries from the search results added to perform database functions on.

Add To Selected — Adds the selected entries in the Search Results panel to the Selected Customers panel.

Clear Search Results — Clears all profiles from the search results panel.

Selected Customers — Displays the selected customers using ADD TO SELECTED.

Remove From Selected — Removes the selected profile from the selected results panel.

Clear Selected — Removes all selected profiles from the selected results panel.

Merge Customers — Merges two or more selected profiles into a single profile.

Delete Customers — Removes the selected profile from the Aloha Takeout database.

Installation:

No installation is necessary. Create a shortcut to the %ATOPATH%\BIN\AlohaTakeoutConsole.exe utility on the desktop or Start Menu to access this utility, as needed.

Using the Aloha Takeout Customer Organizer:

Removing Duplicate Customers

Duplicate records may contain incomplete or temporary information that was used to enter an order. These are sometimes the result of an incomplete import. In this case, the profile has no ongoing value and needs to be deleted. The following steps allow you to delete the profile:

1. Enter **characters** in the search area or click **Find Potential Duplicates**. The Takeout Customer Organizer locates similar records that contain the same information.
2. Double-click the **customer record** on the right to select for potential deletion.
3. Select the **customer record** from the search results and click **Add to Selected**.
4. Select the **customer below** and then click **Delete Customers**.
5. Click **Yes** to remove the selected customer from the database. All removals are finalized at ATO End-of-Day, to account for offline situations.

> **CAUTION** There is no way to recover a deleted record once you select Yes, other than restoring the entire Takeout database from a previous backup.
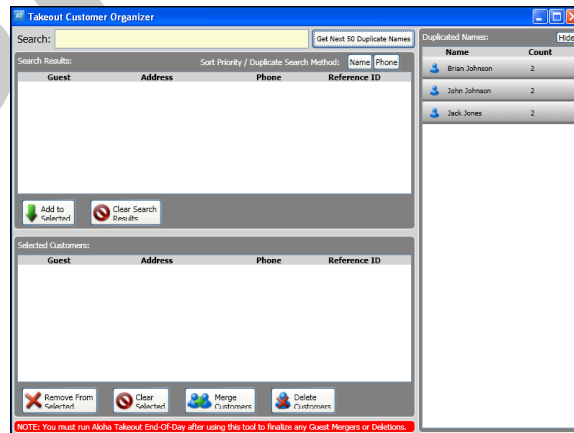
Figure 5 - 12 Customer Organizer, Find Duplicate Names

Merging Customer Records

The Merge Customers function combines the information for multiple customer records into a single record. This occurs if multiple employees enter the same information for a single customer. The customer would like their activity combined into a single record. This function allows the history count, history total and last activity date to be merged with the selected primary record. All other secondary profile information is discarded after the merge.

1. Click **Find Potential Duplicates**. The Takeout Customer Organizer locates similar records that contain the same information.
2. Double-click the **customer record** on the right to select for potential deletion.
3. Select the **customer record** from the search results and click **Add to Selected**.
4. Click **Merge Customers**.
5. Select the **primary record** from the list and click **OK**.
6. Click **Yes** to complete the merge. The selected record displays the merged record, with the sum of the visits.
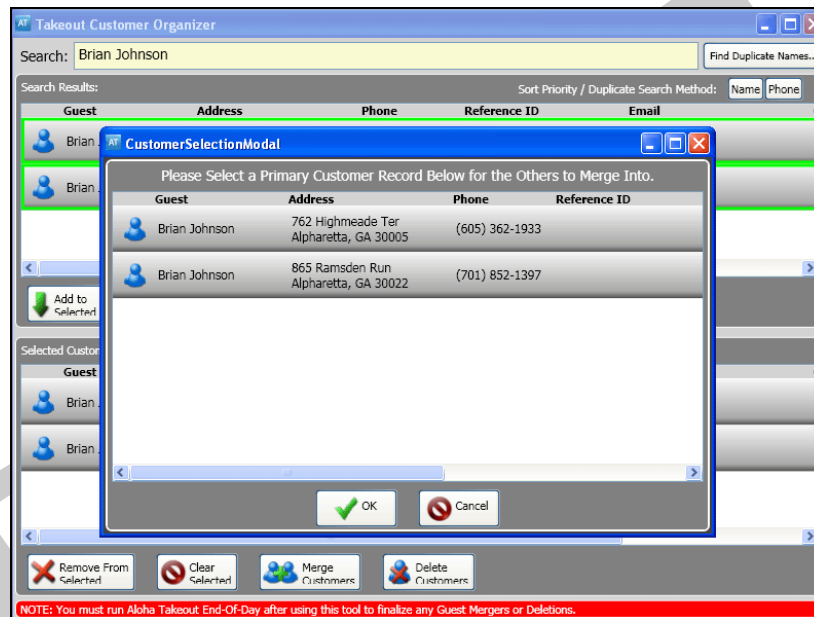
Figure 5 - 13 Customer Organizer, Merge Customers

Translation Editor

The Aloha Takeout Translation Editor provides Aloha Takeout users with the ability to translate the default English User Interface text to a customized text configuration. This tool enables the following:

- Translation to region-specific or dialect-specific text.
- Translation to concept-specific terminology.

Translation Editor File Structure

The Aloha Takeout install creates the following directories:

- %ATOPATH%\Translations — Contains: Radiant.Hospitality.AlohaToGo.TranslationBase.txt and any override files created through the translation editor.
- %ATOPATH%\Utilities\TranslationEditor.

    - \Bin — Contains: TranslationEditor.exe.
    - \Data — Contains: TranslatingApplications.xaml and TranslationEditorSettings.xml.

Launching the Translation Editor:

1. Launch **TranslationEditor.exe** from the %ATOPATH%\Utilities\TranslationEditor\BIN directory. Translation is typically a one-time event. Optionally, create a shortcut to this executable, if you expect the Translation Editor to be used frequently.
2. Select a **language** from the drop-down list.
3. Click **Add Language** to add it to the 'Languages Available' list.
4. Highlight the **desired language** in the list and click **Edit Language** in the bottom right corner. You are now ready to begin translating ATO text.
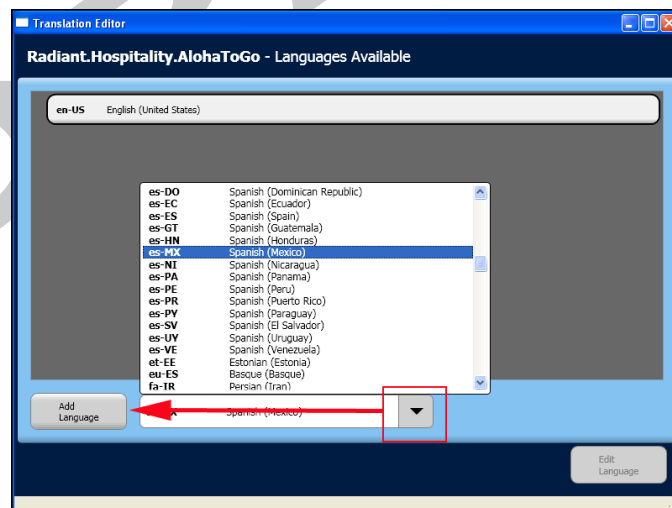
Figure 5 - 14 Translation Editor, Select Language

Begin language translation:

There are a couple of ways to think about the Translation Editor tool and its use:

- You need ALL words or phrases translated to another language within ATO — The recommendation is to step through all lines and translate each word or phrase, as necessary.
- You only need to translate a few words and/or phrases within ATO — Use the search to enter key words and/or phrases you wish to translate. The ATO user interface is a good place to identify key words and phrases.

If you are unsure of the correct location or key word, enter a phrase or special characters you can easily identify when scanning through Aloha Takeout Configuration or the ATO FOH.

---

1. Decide **how much translation needs to occur**, all words and phrases or a few words and phrases, and begin the **translation effort**.
2. Click **Done** to receive a prompt to save the translations file.
3. Select the **Culture** in the **Maintenance > Aloha Takeout Configuration > System tab > Culture** drop-down list. This dictates which translation file ATO uses based on the ISO language and country standard.
4. Restart the **Radiant Takeout and Delivery service**.
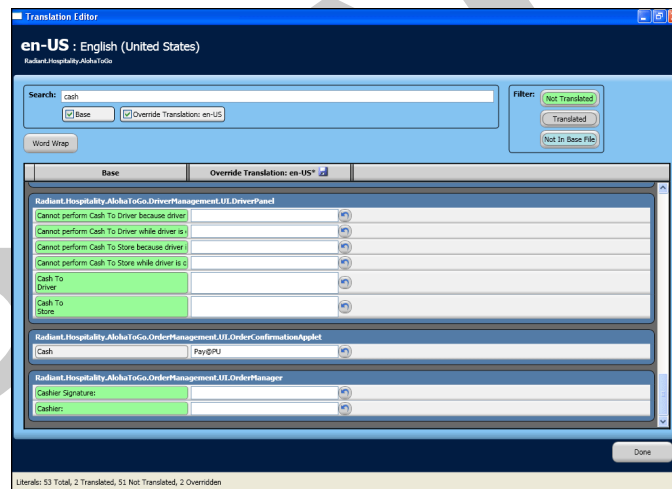
Figure 5 - 15 Translation Editor, String Translation

Search — Enables you to search for a word or phrase that already exists in the translation file.

Base — Contains the existing English text used by ATO.

Main Translation — Enables you to type the equivalent text for the language being translated. Click **Save** to save input as you go. Main translations are intended to be "NCR Official" translations for the given language.

Create Override File — Allows you to create a second translation file that overlaps the main translation file for a language. This allows you to customize text in the application, if they need to vary from the "Official" translation. This only applies to 'en-US.' only the override file can be created.

Word Wrap — Regulates whether or not the long text is wrapped in the base, main translation, and override fields, while you are using this editor tool. Word wrapping helps on smaller width screens, but it can obscure where carriage returns are located in the actual text that appears in the ATO client application.

Word wrap has no effect in ATO at runtime.

Filter Options — Allows you to filter the text that appears on the screen by choosing one of the following filters: only new text that has been added to the base file (a list of all text currently in the application) but is not yet in the given translation, text that has been translated and is in active use, or previously translated text that no longer appears in the current version of the ATO application.

> **Not Translated —** New text that has been added to the file but is not yet in the given translation.
>
> **Translated —** Text that has been translated and is in active use.
>
> **Not in Base File —** Previously translated text that no longer appears in the current version of the ATO application.

Done — Exits the application and updates/creates the Translation File in the "\Takeout\Bin" directory.

Example: To re-label the Cash button on the Confirmation screen:

1. Open the **Translation Editor** and perform a search for "cash."
2. Scroll **down** until you find the **correct screen** for the button. In this case we are looking for the confirmation screen. Sections are somewhat intuitive. Look at the last part of the section header. In this case, find the "Radiant.Hospitality.AlohaToGo.OrderManagement.UI.***OrderConfirmationApplet***".
3. Type the **new label** (*example: "Pay@PU"*) into the **override translation** column.
4. Click **Done**.
5. Click **Yes** to save the change.
6. Restart the **Takeout service**.
7. Run a **Refresh** to restart the terminals.

After a refresh, the confirmation screen should look as follows:
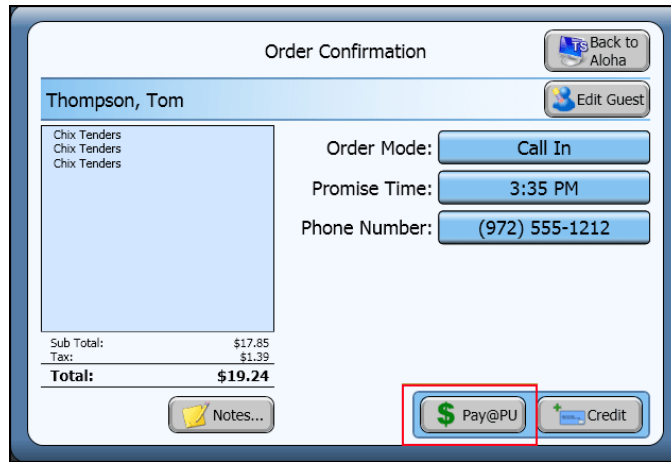
Figure 5 - 16 Confirmation Screen, Cash button translated

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A Appendix A: Installation

Checklist

This checklist is designed to help you track local efforts at installing Aloha Takeout in a site, or a corporate test laboratory. Use the main document to obtain information about how to accomplish steps listed in this checklist. One way you can use this checklist is to print just these pages, and physically check off items on the list as you complete them. This process will help you to perform steps in the correct order, as well as ensure that you do not forget to perform each step, as required. Use the page references, provided with each checklist item, to get information about how to complete each step.

Installing Software Prerequisites and Aloha Takeout

❏	Install Microsoft® .NET v3.0 SP1	page i-ix
❏	Install Microsoft SQL Express 2005 SP2	page i-ix
❏	Install Microsoft SQL Server Management Studio Express SP2 (optional, but recommended).	page i-ix
❏	Install Aloha Takeout on the Aloha BOH file server, selecting 'Server Installation' when prompted. If you are upgrading, remember to save a copy of the current Aloha Takeout\Data directory, if you anticipate a need for it.	page 1-5

Configuring the Aloha System

You must configure the Aloha POS system first, before attempting to configure Aloha Takeout. Complete the following, to prepare Aloha for use with Aloha Takeout

❏	Make Aloha Takeout Active.	page 2-4
❏	Import Aloha Takeout data.	page 2-6
❏	Activate Aloha Takeout stores (CFC only).	page 2-8
❏	Add or modify order entry queues, as necessary, to organize your orders into queues that reflect functionality in Aloha Takeout. Set the 'Delivery Queue' in the Maintenance > Store Settings > Delivery group > Delivery Orders tab.	page 2-11
❏	Add or reconfigure order modes, as required, to support new or modified ways of accepting orders in Aloha Takeout.	page 2-9
❏	Create one Radiant interface terminal for each physical terminal on which you will accept Aloha takeout or delivery orders. For each Radiant interface terminal, make the associated physical terminal the interface host.	page 2-25

❏	Create job codes for interface employees and training interface employees to use. Verify interface employees are assigned to the appropriate job code. Create and configure new or existing job codes, such as delivery driver, order taker, or dispatcher, to work with Aloha Takeout.	page 2-14
❏	Add or modify access levels, as necessary, to provide functionality in Aloha Takeout.	page 2-19
❏	Create one interface employee for each terminal on which you will accept takeout or delivery orders using Aloha Takeout, and configure as noted. Add 'dummy' training employees as needed.	page 2-22
❏	Create a comp for use with customer credits.	page 2-27
❏	Create or configure petty cash accounts to support driver bank and driver drop functions, for dispensing cash to drivers, and for collecting money from them after they complete deliveries. Use the perspective of the driver, when creating these accounts.	page 2-28
❏	Create or configure a void reason to use for future orders.	page 2-29
❏	Create house accounts, as necessary, to provide house account billing of ATO orders.	page 2-30
❏	Create a 'Deposit' tender to use for accepting deposits for future day orders, if applicable in your site. Create a 'House Account' tender to use for accepting payments from house account customers. Create a 'Prepaid' tender to use when applying payments to delivery service orders.	page 2-31
❏	Create two open items, 'Order Deposit' and 'Order Surrender,' to support accepting deposits for future day orders, if applicable in your site. Create an 'Unavailable' item to replace "86" items on kitchen chits when releasing future and online orders.	page 2-34
❏	Create 'Grocery' and 'Label Printing' categories, as necessary, to provide functionality in Aloha Takeout.	page 2-39
❏	Create Front-of-House (FOH) buttons as required, to support order creation, and transport between Aloha Takeout and the Aloha FOH screens. For Quick Service, create buttons on an appropriate 'button function' panel. For Table Service, create buttons on a button function panel through the Floor Plan feature, and provide access to these buttons from existing panels, or by enabling the panel as the 'home screen' for the interface employee.	page 2-47, QS page 2-49, TS

Configuring Aloha Takeout

After configuring the Aloha system, you are ready to configure Aloha Takeout itself, as outlined below by tab.

	Configure the Takeout Tab	
❑	Verify POS type is correct, and select the primary queue for Aloha Takeout.	page 3-4
❑	Select the Takeout and Delivery queue, as used in your site.	page 3-4
❑	Select the cash accounts drivers will use for receiving cash from, and returning cash to the store.	page 3-5

	Configure the Order Modes Tab	
❑	Map the POS order modes to Aloha Takeout, as used in your site.	page 3-6
❑	Configure Items Ordered Receipt Printers as necessary.	page 3-6

	Configure the Customer Information Tab	
❑	Configure customer name options.	page 3-7
❑	Enter default information for customer addresses, to make customer record entry faster.	page 3-7
❑	Enable and configure house accounts, if used.	page 3-8

	Configure the Deposits Tab	
❑	Use these options to enable future order deposits, and to configure Aloha Takeout to use configuration elements in the Aloha POS to account for them.	page 3-11

	Configure the Aloha Tenders Tab	
❑	Add each tender in the Aloha system, that you want to use to accept payment for orders, in Aloha Takeout. This configuration permits cash transactions to close automatically, and makes it possible for the system to retrieve stored payment card information.	page 3-13

	Configure the Printing Tab	
❑	Use these options to specify locations and specific types of information to print, for the benefit of the customer, drivers, and kitchen employees, as required.	page 3-14
❑	Use these options to specify label printers and when to print labels, as required.	page 3-17

	Configure the Options Tab	
❑	Configure Delivery options to reflect local needs, if you offer a delivery service.	page 3-30
❑	Enable Future Orders, to enable taking orders significantly in advance of normal promise times.	page 3-33
❑	Select Caller ID options if connecting a caller ID device to the system.	page 3-27
❑	Select 'Enable Curbside' if you are using the drive-in, in-car dining model.	page 3-25
❑	Select 'Enable Mapping' if the mapping application is licensed and installed.	page 3-25
❑	Select 'Enable Credit Card Storage' if and when the credit card is authorized.	page 3-25
❑	Select 'Enable Paging' if you are using pagers for walk in orders.	page 3-25

❏	Configure order timing options.	page 3-26
❏	Configure End of Day to approximately one hour prior to the Aloha End-of-Day.	page 3-32
❏	Configure the Invoicing options to support the invoice forms used by your site to support customer invoice printing.	page 3-34
❏	Configure Kitchen Integration options to reflect preparation time expectations.	page 3-35
❏	Enable and configure customer credits to the correct comp ID.	page 3-38

	Configure the Order Scheduling Tab	
❏	Enable Order Capacity Tracking, if desired, and configure associated options to define the way the Preview panel shows the daily time segments.	page 3-38
❏	Use Schedule Block Properties to configure the time blocks in the Weekly Schedule section of the screen.	
❏	Use Order Mode Capacities to establish maximum values for order and item counts per time block.	

	Configure the Barcode Scanners Tab	
❏	Select 'Enable USB Barcode Scanners,' if you want to install and use this type of hardware. Scan a bar code with this tab active to obtain the necessary hardware information.	page 3-42

	Configure the Panel Options Tab	
❏	Configure screen search time outs, columns and expansion parameters.	page 3-43
❏	Configure quote time elements on the Info Bar tab.	page 3-53

	Configure the Delivery Fees Tab	
❏	Enable and select delivery fees and parameters with which to calculated delivery fees on an order.	page 3-56

	Configure the Phone Numbers Tab	
❏	Configure telephone number options.	page 3-57

	Configure the Custom Settings Tab	
❏	Create and adjust any Aloha Takeout options not listed in other tabs using xPath and Elements. This is typically only needed for concept specific and controlled deployment options.	page 3-60

	Configure the Delivery Area	
❏	Import or manually create and edit delivery area zones and streets.	page 3-62

	Configure the System Parameters	
❏	Enter the IP address of the server on which to broadcast Aloha Takeout messages.	page 3-65

General Index