

Aloha Digital Ordering and Aloha Takeout Integration Guide

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About Aloha Digital Ordering and Aloha Takeout

Efficiently managing the realities of your online ordering operations improves your speed of service and gives you the opportunity to grow beyond the walls of your business. Sites using Aloha[®] Digital Ordering can leverage the Aloha[®] Takeout (ATO) application to automatically inject online orders into the Aloha point-of-sale (POS) system. Aloha Takeout then provides an order management utility through the Front-of-House (FOH) user interface that allows you to release, reactivate, or cancel an online order.

As a best practice, we recommend installing Aloha Takeout from the Aloha Suite Installer, and accept the default installation path, within the 'BootDrv share,' meaning within the same directory as Quick Service or Table Service. For example:

D:\BootDrv\Aloha Takeout

D:\POS\Takeout

Aloha Digital Ordering and Aloha Takeout at a Glance	
Core product	NCR Aloha Quick Service or NCR Aloha Table Service is required, version 12.3, or later.
Complementary products	NCR Digital Ordering, NCR Aloha Table Service or NCR Aloha Quick Service, BSP.
Separate license required?	Yes, NCR Aloha Takeout requires a separate license
Other References	NCR Aloha Quick Service or Table Service Manager Guides or Reference Guides, Aloha Takeout for BSP Feature Focus Guide, NCR Digital Ordering Implementation Guide.

Hardware and system requirements

There are specific hardware and system requirements for Aloha Takeout, and other products to integrate with Digital Ordering. Please refer to the [Digital Ordering Software Requirements - HKS1521](#) document.

Overview

Aloha Takeout is an independent module that works with NCR Digital Ordering and the Aloha POS system to make your online ordering business easy to manage. They work together to create, monitor, and maintain online orders. Functions such as order entry, modification, taxation, and tendering of orders take place in the Aloha POS system, 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 Digital Ordering. Aloha Takeout works behind the scenes to facilitate complex or automated functions, using virtual components to accept online orders and automatically release them at the appropriate time.

Aloha Takeout uses data in a slightly different way than the Aloha POS system. You must understand these differences, to avoid possible frustration while trying to locate configuration elements that may seem to vanish.

Aloha POS stores configuration changes in the CFC SQL database. During the end-of-day (EOD) or the refresh process, Aloha makes these changes available to the front-of-house (FOH) in the \\%Localdir%\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. You can make configuration changes 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 helps you to make the best of these data usage differences:

1. Install **NCR Aloha Takeout** on BOH and FOH, using RAL, which makes 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 for Digital Ordering.
5. Select **Maintenance > Takeout Configuration > Takeout Settings**.
6. Refresh **data**.

Note: 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 implement these requirements with the greatest efficiency:

1. Reopen your configuration management tool and ensure all associated services are running.
2. Make all necessary **changes** in the Aloha POS system.
3. Make all necessary **changes** in Aloha Takeout.
4. Refresh **data**.

Note: Similar to the POS, the Aloha Takeout client reads the latest configuration data each time the client starts. The Aloha Takeout client reads from the %ATOPATH%\Data directory on the BOH file server. Aloha Takeout detects the POS refresh process and restarts the client.

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

When a customer creates an online order, Aloha Takeout interacts with the interface terminal to perform the following:

1. The customer creates an order in Digital Ordering.
2. Digital Ordering sends the order to the specified store.
3. Aloha Takeout receives the online order, logs the interface employee into the terminal, and uses Aloha Connect to create a check in the Aloha POS.
4. Aloha Takeout uses the deposit functionality (if configured), or an NCR Payments Gateway solution leveraging eCommerce MIDs and HVT, to address any payment information associated with the online order.
5. Aloha Takeout releases the order to the specified queue in Aloha POS.

-OR-

Stores a future online order in the Aloha Takeout database, until the release criteria are met.

6. After Aloha Takeout releases the online order, a guest check prints at the printer specified on the interface terminal.
7. An employee arranges the printed guest check, as necessary, to quickly locate an order when a customer arrives.
8. An employee uses the Aloha POS recall check function and enters the check number printed on the guest check to access the online order for the customer.
9. For orders with a balance due, the employee uses the Aloha POS system to complete the tender process and close the order.

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

Aloha Takeout uses an interface terminal, and an interface employee, to accomplish several types of tasks. These tasks take place on the interface server do not appear on the Aloha FOH user interface. Examples of Aloha Connect functions include:

- Accepts and processes orders from Digital Ordering.
- Releases an online order at the specified time.
- Passes associated payment information to the FOH.
- Passes the calculated delivery fee to the POS, for inclusion in an order.
- Monitors the order status, and updates, as appropriate.

Payment activities do not occur natively within Aloha Takeout. They occur within Aloha Digital Ordering and Aloha Takeout uses Aloha Connect to pass payment information to the Aloha POS system. Mapping the appropriate 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 customers.

Mapping payment card tenders in Aloha Takeout to the correct payment card IDs in the Aloha POS system allows the system to apply payment card information passed from Digital Ordering to the appropriate payment card in the Aloha POS system.

As you configure Aloha Takeout, bear in mind that Aloha Takeout addresses orders for concepts that use Digital Ordering to account for online sales. Digital Ordering passes the order mode as part of the online order, which is mapped to the ATO order type. and allows you to target orders for pickup.

The **web** order mode allows you to target orders for pickup. Digital Ordering passes the Web order type as part of the online order, which has the same functionality as the Call-In order type in ATO.

The **delivery** order mode supports delivery operations, if your operation supports delivery operations. Digital Ordering passes the order mode mapped to the 'Delivery' order type in ATO as part of the online order message. Customer information, including the address print in the header on chits and guest checks.

The **curbside** order mode enables mobile apps to pass curbside information to address online orders for concepts with one or more designated outside pick up parking spaces. The car information prints on the header to match an order to the customer when they park in one of the designated spaces.


The **dine-in** order mode supports keeping checks open for the Contactless Dine-in feature with Digital Ordering.


Conventions used in this guide


Numerous graphics and instructions appear throughout this guide. These conventions make it easy to find and understand information.

Symbols and alerts

The following graphic symbols alert you to important points throughout this guide:

 **Note:** Highlights a special point of interest about the topic under discussion.

 **Reference:** Directs you to a more complete discussion in another chapter of the current guide or other reference material.

 **Tip:** Points to a useful hint that may save you time or trouble.

 **Caution:** Alerts you that the operation being described can cause problems if you are not careful.

Installing ATO on the BOH file server

This section summarizes the steps required to install Aloha Takeout on the Aloha BOH file server for use with Aloha Takeout.

Preparing the site

1. Confirm the **Aloha POS** and the **configuration management tool** are installed and operating correctly on the Aloha BOH file server and terminals.

Note: Both CFC and new Aloha Manager automatically install SQL Express during installation, as required by Aloha Takeout.

2. Install **SQL Management Studio Express** on the file server. (Optional, but recommended.)

Note: Both CFC and new Aloha Manager automatically install SQL Express during installation. We recommend installing the configuration management tool before installing Aloha Takeout. We recommend you install SQL Management Studio Express, as a best practice, in the event you must manually manage, backup, or recover your database.

3. Confirm the **Aloha NIC** is in the top position in the Connections list.

Performing the install

You must install Aloha Takeout on the Aloha BOH file server 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.

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, where 'x' represents the version number of the file. Prior to attempting this installation, you must log in to the Aloha BOH file server as Administrator.

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.

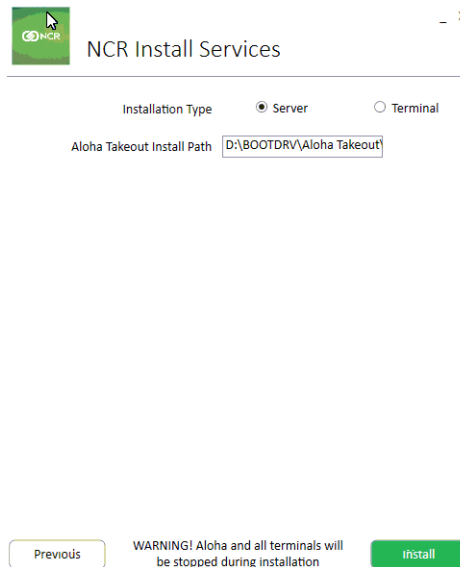


Figure 1 Aloha Takeout Setup, Installation Type

4. Select **Server Installation**.
5. Click **Next** and confirm or select the new **Aloha Takeout** directory as the preferred destination.
6. Click **Next** and follow the **prompts** to the end of the installation process.
7. Click **Finish** to complete the installation.

Configuring the Aloha environment variables

You must verify the environment variables on the Aloha BOH file server are correct and add missing environment variables, as necessary. The location of IBERDIR and LOCALDIR values listed below are only examples. These directories should match the location of Aloha on the BOH file server:

- IBERDIR=D:\Bootdrv\AlohaQS or D:\Bootdrv\AlohaTS (may vary based on the POS installation location)
- IBERROOT=D:\Bootdrv\AlohaQS or D:\Bootdrv\AlohaTS (may vary based on the POS installation location)
- LOCALDIR=D:\Bootdrv\AlohaQS or D:\Bootdrv\AlohaTS (may vary based on the POS installation location)
- MASTERCAPABLE=FALSE
- NOFATALMSGBOX=TRUE
- NUMTERMS=(number of terminals connected to the BOH file server)
- SERVER=(name of the BOH computer)
- SERVERCAPABLE=FALSE

- TERM=<# of the interface server terminal ID).
- TERMSTR=<yourtermstring> (This should match TERMSTR on all terminals.)

Please be aware that some variables may already be set up. You do not need to add them again.

To confirm the Aloha environment variables:

1. Click **Start**, right-click **Computer**, and select **Properties**.
2. Select **Advanced system settings**.
3. On the Advanced tab, click **Environment Variables**.
4. In the 'System variable' group box, confirm the **environment variables** above exist and add, as necessary.
5. Click **OK** and close **Environment Variables**.
6. Click **OK** and close **System Properties**.

Registering RDF proxy

You must register the RDFProxy dynamic link library for Aloha Takeout to interact with online orders.

To register RDF proxy:

1. Open a **command prompt**.
2. Type **cd d:\bootdrv\Aloha Takeout\bin**. The path may vary depending on where you installed ATO.
3. Type **C:WINDOWS\Microsoft.NET\Framework\v2.0.50727\regasm.EXE/codebase AlohaTakeoutInterface.RdfProxy.dll** and press **Enter**. A dialog box appears when the dll is successfully registered.
4. Exit the **command prompt**.


Configuring Command Center Agent to use the RDF proxy

When implementing the RDF Proxy, you need to configure the Command Center Agent to use the proxy.

To configure the Command Center Agent to use the RDF proxy:

1. Browse to the **Command Center Agent installation directory**. By default, the path is C:\Program Files\Radiant Systems\CMC.
2. Locate and edit **Command.Center.Config**.
3. Between the <commandcenter></commandcenter> tags, type i.<onlineOrderServer ipAddress:"weborder.alohaenterprise.com" port="8082" ssl="true" proxy="1-1100,D:\Bootdrv\Aloha TakeOut\Bin\AlohaTakeOutInterface.RdfProxy.dll,1" />. **Note:** If the path to the Bin folder is different, replace the path with actual location of the Aloha Takeout Bin folder.

4. Select **File > Save** to exit the file.
5. Restart the **Radiant Command Center Agent Service**.

 **Tip:** If you previously had Site Agent installed on the system, remove the Site Agent RDF Proxy statement in the file.

Preparing Aloha POS for ATO

You must perform several configuration steps to successfully integrate the Aloha POS with Aloha Takeout. You may find some requirements are already active in your current database, or may not be relevant to your site. For example, if you already have a 'Takeout' queue, it is unnecessary to configure another. The configuration requirements are within the Aloha POS; however, some have a corresponding requirement in Aloha Takeout.



Reference: 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.

Enabling Aloha Takeout in the product panel

You must enable Aloha Takeout as an installed product, to make Aloha Takeout available in the product panel. Once active, the Takeout icon appears in the product panel at the top of the screen for both Aloha Configuration Center and the new Aloha Manager. Click the Takeout icon to display the Takeout Configuration tree under the Maintenance menu, from which you can access and perform the configuration tasks specific to and required by Aloha Takeout. .

Takeout settings

In CFC, options specific to Aloha Takeout apply to the majority of sites. For sites that offer a variation from these settings, such as a site offering delivery, create a version of Takeout Settings, enable the delivery options, then assign the new version of Takeout Settings to the delivery sites.

Active stores

Allows you to define which sites within an enterprise offer takeout or delivery operations. [See "Making a store active with Aloha Takeout" on page 11.](#)

Sharing POS maintenance functions with Aloha Takeout

Some of the POS maintenance functions are shared between Aloha Takeout and the POS system.

To successfully integrate Aloha Takeout with the Aloha POS system:

1. Log into **Aloha Manager** or **Aloha Configuration Center** as a global user.
2. Select **Quick Service** or **Table Service** in the product panel.
3. In Aloha Manager, select **Maintenance > Business > Installed Products**.
- OR -
In Aloha Configuration Center, select **Maintenance > Business > Global Administration**.
4. Under the 'Products installed' group bar, select **Uses Takeout**.
5. Click **Save** and exit either **Installed Products** or **Global Administration**.
6. Log out and log back in for the Takeout icon to appear in the product panel.

Enabling Aloha Delivery for use with Aloha Takeout (TS only)

Aloha Takeout uses Aloha POS functionality that was implemented for the legacy Aloha Delivery product. This includes queues, order modes, service charges, driver fees, and driver checkout printing. You must enable 'Display delivery' when using Aloha Takeout with Aloha Table Service to enable queue functionality.

To enable Aloha Delivery options to appear:

1. Select **Maintenance > Business > Additional Features**.
2. Under the 'Options to display' group bar, select **Display delivery**.
3. Click **Save** and exit the **Additional Features** function.

Importing Aloha Takeout data

Before you can begin configuring Aloha Takeout for your site, you can use one of the following methods to optionally import initial Aloha Takeout data into the CMT. You can:

Use the default **%ATOPATH%\Data directory** created when installing ATO on the Aloha BOH file server.

— OR —

Copy the **%ATOPATH%\Data directory** from another Aloha Takeout or ATO Order Manager installation and overwrite your local ATO data files.

To import Aloha Takeout data:

1. With Takeout selected in the product panel, select **Utilities > Takeout > Run Import**.
2. Verify the **correct path** for Aloha Takeout appears in the 'Folder' text box.
3. Click the **ellipsis (...)** to change the path, if necessary.
4. Click **Next** to proceed with the import.
5. Inspect the **Import Report** to determine if significant errors occurred during the import.
6. Click **Commit**, if no significant errors are in the Import report. If there are errors, resolve or contact NCR support for assistance.
7. Click **Finish** in the Import Completed screen. The configuration management tool automatically logs out at this point, as noted in this screen.

The next time you log in to the configuration management tool, the imported data is active and accessible.

Making a store active with Aloha Takeout

Aloha Configuration Center makes use of an active stores list to stipulate when a store is ready to begin using Aloha Takeout, meaning all configuration is complete, equipment is in place, and employees are trained. The use of the active stores list makes it possible to hide Aloha Takeout

functionality at stores that do not offer online orders, as well as to leave a store as inactive until you are ready for online order operations. Once you add a store to the active stores list, you can export the configuration to that store and the store can begin using Aloha Takeout immediately following the next refresh.

Note: The Active Stores function is only available in Configuration Center. Skip this procedure, if you use Aloha Manager.

Note: After you enable Aloha Takeout in Aloha Configuration Center, and complete the configuration, you must make Aloha Takeout active, to begin exporting configuration options for each store. In the case of Aloha Takeout, CFC updates the AlohaToGoConfig.xml each time you perform a refresh, overwriting the existing configuration at the store.

To make a store active:

1. Log in to **Aloha Configuration Center** as a corporate user.
2. With Takeout selected in the product panel, select **Maintenance > Takeout Settings > Active Stores**.
3. Under the 'Takeout Stores' group bar, select a **store** in the Inactive list and click the **right-arrow** to move the store to the Active list.
4. If you accidentally move a store to the Active list, you can select it, then click the left-arrow 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**.

Creating POS order modes

As you configure POS order modes, keep in mind that Aloha Takeout bases its printing functionality on the type of order being entered. For example:

- An online order for customer pick-up prints the customer name and phone number in the guest check and chit headers.
- An online order for delivery prints the customer name, phone number, and address in the guest check and chit headers.

In other words, the type of order controls the information that appears on checks and chits, to manage online orders effectively.

Caution: For proper interaction between Aloha Takeout and the Aloha POS, these modules cannot share order modes. Sharing order modes can have undesired results in the flow of online orders. You must create a unique order mode for each online order type you accept in your site, separate from the POS order modes.

Important: As of ATO v19.x, you must define a Source and Destination record to address all order sources leveraged by an online ordering solution, such as a store website and a delivery marketplace. This enables the online ordering solution to inject orders into ATO. If this record does not exist, order injection fails. Refer to the Aloha Takeout Source and Destination Feature Focus Guide - HKS380.

Suggested Settings: POS Order Modes for Aloha Takeout		
Settings	Web (pickup)	Delivery
Order Mode tab		
Active	√	√
All Items	√	√
Include Ordered Items (QS Only) — Select this option to change the order mode in Quick Service.	√	√
Service charge group bar		
Apply service charge — Select this option if you are adding delivery fees to checks.		√
Charge line text		Delivery Fee
Tax applied to service charge — 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 — Select Fixed as opposed to Percent.		√
Amount — Aloha Takeout calculates the delivery fee based on the defined Aloha Takeout configuration and passes the amount to the POS, replacing the 0.00 amount. See “Enabling delivery fees” on page 39.		0.00

To create a POS order mode for use with Aloha Takeout:

1. With Takeout selected in the product panel, select **Maintenance > System Settings > Order Mode**.
2. Click **New** to add a new order mode.
3. Using the [Suggested Settings: POS Order Modes for Aloha Takeout](#) table, make the **desired selections** for the order mode you want to add.
4. Repeat the **steps above** for each POS order mode used by Digital Ordering and Aloha Takeout.
5. Click **Save** and exit the **Order Mode** function.

To align POS order modes with Aloha Takeout:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings**.
2. Select the **Order Modes** tab.
3. Click the **Add** drop-down arrow, select an **ATO order type**, and click **OK**. The order type is added to the list of order types under the 'Order Modes' group bar.
4. Click the **Order mode** drop-down list for each ATO order mode type and select the **POS Order mode** to which it aligns.
5. On the Order Modes Properties tab, under the 'Settings' group bar, select **Print label** to print labels for a selected order type.
6. On the Receipt Printer tab, select a **printer** in the Available list and click the **right-arrow** to move it to the Included list. This is used to print a guest check when an online order arrives.
7. On the Sundries Items Printer tab, select a **printer** in the Available list and click the **right-arrow** to move it to the Included list. This is used to print a sundries chit when an online order arrives.
8. Repeat the **steps above** for each order type supported at your location.
9. Click **Save**.

Creating an order entry queue

You must create an order entry queue in the Aloha POS exclusively for use with online orders. Aloha Takeout stores orders to the defined 'takeout' queue, when the system receives new online orders. Employees recall orders from the specified queue to address online orders, as necessary.

To create an order entry queue:

1. With Takeout selected in the product panel, select **Maintenance > System Settings > Order Entry Queue**.
2. Click **New** to create a new order entry queue exclusively for Aloha Takeout.
3. Type a **name** that is easily recognized for use with online orders. For Table Service, skip to step 9. For Quick Service, continue with step 4.
4. Under the 'Settings' group bar, click **Default order mode** and select an **order mode** you created for use with Aloha Takeout from the drop-down list.
5. Clear **Auto open new order**.
6. Type a **maximum number of open orders**, up to 255.
7. Type a minimum and maximum **order number**.
8. Type a **prefix** that identifies orders on the 'Takeout' queue in 'Order number prefix text.'
9. Click **Save** and exit the **Order Entry Queue** function.

To associate the POS order entry queue created for online orders with Aloha Takeout:

1. Select **Maintenance > Takeout Configuration > Takeout Settings**.
2. Select the **Takeout** tab.
3. Under the 'Takeout and Delivery Queue' group bar, select the **queue** you created for use with Aloha Takeout from the 'Queue' drop-down list.
4. Click **Save** and exit the **Takeout Settings** function.

i Note: The configuration management tool automatically updates the 'DELIVERYQUEUE=' option in the Aloha.ini to match the queue defined in Takeout Settings. This prevents issues when Aloha Takeout releases orders in Table Service, if the queues do not match.

Creating a job code for an interface employee

Aloha Takeout requires you create a job code for the interface employee. This allows the interface employee to perform the required POS functions within the interface terminal after Aloha Takeout automatically clocks them in.

ATO Order Manager: When you use ATO Order Manager, create an 'Order Manager' job code in addition to the required job code for the interface employee.

To create a job code for an interface employee:

1. Access **Maintenance > Labor > Jobcodes**.
2. Click **New**.
3. On the Jobcode tab under the 'Identification' group bar, type a **name** for the interface job code.
4. Type a **description** to additional information to help others understand the purpose of this job code.
5. Under the 'Time and Attendance' group bar, select **Shift required for clock in/out**.
6. Select the **Order Entry** tab.
7. Under the 'Order entry' group bar, select **Order entry**.
8. Select **Interface**. This option automatically selects 'Exclude from Labor Scheduling' and 'Do not print or export' (located on the Financial tab) when the configuration management tool exports the configuration to the Aloha POS system.
9. Select **Can get checks from other employees**.
10. Under the 'Screens' group bar, select the **order entry queue** from the drop-down list to specify the queue to which Aloha Takeout releases online orders.
11. (Table Service only) Under the 'Delivery' group bar, select **Delivery order taker** to allow the interface employee with this job code to access the Aloha Takeout queue.
12. Select the **Financial** tab.
13. Under the 'Financial' group bar, select **Uses cash drawers**, if you use petty cash accounts for driver banking.
14. Select **Self banking**.
15. Under the 'Report settings' group bar, select **Do not update FOH Flash Report**.
16. Click **Save** and exit the **Jobcodes** function.

Note: Options on the Takeout tab control user interface functions within Aloha Takeout. Ignore the options on this tab, since interface employees do not interact with the user interface.

Creating POS access levels for an interface employee

Additional options appear in the Pos Access Levels function to authorize functionality specific to the interface employee. Although an interface employee may not be able to perform the functions associated with the POS access level options, we recommend you select all access level options for the interface employee to prevent any issues with addressing online orders.

ATO Order Manager: Create an additional POS access level to use with ATO Order Manager.

⚠ Caution: To prevent unauthorized use of this virtual employee by an actual employee, select 'Use Mag Card' in employee maintenance for the interface employee.

To create an access level for an interface employee:

1. Access **Maintenance > Labor > Pos Access Levels.**

Pos Access Levels	
POS Access Level: 90 OLO Mngr	
Access Level	
Identification	
Number	90
Name	OLO Mngr
Aloha Takeout	
Can override order capacity	<input checked="" type="checkbox"/>
Can override restricted dispatch	<input checked="" type="checkbox"/>
Can override 'No order assignment until after bump'	<input checked="" type="checkbox"/>
Can override 'Required Aloha Loyalty member ID for n...	<input checked="" type="checkbox"/>
Authorize deposit refunds	<input checked="" type="checkbox"/>
Authorize deposit surrender	<input checked="" type="checkbox"/>
Driver management	<input checked="" type="checkbox"/>
Approve driver to driver transfers	<input checked="" type="checkbox"/>
Change promise time for active orders	<input checked="" type="checkbox"/>
Can adjust order mode charges	<input checked="" type="checkbox"/>
Can adjust quote time	<input checked="" type="checkbox"/>
Can override delivery area restrictions	<input checked="" type="checkbox"/>
Can add customer credit	<input checked="" type="checkbox"/>
Can add/edit tax exemptions	<input checked="" type="checkbox"/>
Can override 'Require e-mail for new guests'	<input checked="" type="checkbox"/>
Can override tax locale	<input checked="" type="checkbox"/>
Can edit guest name	<input checked="" type="checkbox"/>
Can override 'Require customer first name'	<input type="checkbox"/>

Figure 2 POS Access Levels > Aloha Takeout Group Bar

2. Click **New**.
3. Under the 'Identification' group bar, type a **name** for the access level to help others understand the interface employee uses this access level.
4. Under the remaining group bars, select **every option**.
5. Click **Save** and exit the **Pos Access Levels** function.

Creating an interface employee

You must create an interface employee specifically for use with Digital Ordering. Aloha Takeout automatically clocks in the interface employee to perform functions on the POS system, such as releasing an online order. The interface employee uses the job code and access level you defined earlier.

ATO Order Manager: Create an interface employee to use with ATO Order Manager in addition to the interface employee. This employee is used on the FOH to retrieve the checks from Digital Ordering, and is set in Aloha Takeout > Aloha Takeout Configuration > System Parameters > Aloha Takeout Order Manager.

To create an interface employee in the Aloha POS:

1. Access **Maintenance > Labor > Employees**.
2. Click the **New** drop-down arrow, select **POS only**, and click **OK**.
3. On the Employee tab under the 'Personal information' group bar, type a **social security number**, if required. This entry may be random, but must be unique.
4. Type a **name** in 'First name' to easily identify an interface employee. Example, "ATOOM" for the Aloha Takeout employee.
5. Type an **export ID**, if required.
6. Under the 'POS security options' group bar, select **Use magnetic cards**.
7. Select the **Jobcodes** tab. Select the **job code**, defined earlier for use with interface employees, from the drop-down list.
8. Select the **access level**, defined earlier for use with interface employees, from the drop-down list.
9. Leave the **Current pay rate** as the 0.00 default value.
10. Accept the **default settings** on other tabs.
11. Click **Save** and exit the **Employees** function.

Creating an interface server

The interface server is an instance of the Aloha FOH running on the Aloha BOH file server without a user-interface. The interface service supports the injection of order information into the Trans.log based on information entered by the interface employee into the associated interface terminal. When you select 'Start POS interface' in Takeout Configuration > System Parameters, the Radiant Takeout and Delivery service automatically starts the interface server, and restarts the interface server if it detects the interface server shut down. [See "Configuring system parameters" on page 37.](#) You must create a terminal for the Aloha BOH file server to use as the interface server to support the injection of online orders.

To create an interface server:

1. Access **Maintenance > Hardware > Terminals.**
2. Click **New.**
3. Click the **ellipsis (...)** and select the **terminal number** (TERM=) specified in the environment variables for the Aloha BOH file server.
4. Under the 'Identification' group bar, type a descriptive **name.**
5. Under the 'Settings' group bar, select **Interface server** from the 'Function' drop-down list.
6. Under the 'Other' group bar, select the **revenue center** with which to report online orders from the 'Revenue Center' drop-down list.
7. (Quick Service only) Select the **'takeout' queue** for the interface terminal from the 'Queue' drop-down list.
8. Click **Save.**

Creating an interface terminal

Aloha Takeout uses an interface terminal interacting with an interface server (host), in combination with interface employees, to inject online orders into the system. As stated previously, we recommend giving these entities terminal-centric names, to make configuration and trouble-shooting easier. You must create one Radiant interface terminal for the Aloha BOH file server.

To create an interface terminal:

1. Select **Maintenance > Hardware > Terminals.**
2. Click **New.**
3. Click the **ellipsis (...)** and select a **terminal number.**
4. Under the 'Identification' group bar, type a descriptive **name.**
5. Under the 'Settings' group bar, select **Radiant interface terminal** from the 'Function' drop-down list.
6. Select **Allow order entry.**

7. Select the **interface server** to which to associate the interface terminal from the 'Interface host' drop-down list.
8. Under the 'Aloha Takeout' group bar, select the **employee** you created for use with this interface terminal from the 'Interface employee' drop-down list.
9. Under the 'Printers' group bar, select the **printer** to which guest checks print for online orders from the 'Default printer' drop-down list.
10. Select the **printer** to which vouchers print for online orders from the 'Voucher printer' drop-down list.
11. Under the 'Other' group bar, select the same **revenue center** to which you assigned the associated interface server.
12. (Quick Service only) Select the **'takeout' queue** from the 'Queue' drop-down list for the interface terminal.
13. Click **Save** and exit the **Terminals** function.

Note: here 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.

Creating void reasons for future and canceled orders

Aloha Takeout requires two void reasons: Future Order and Canceled Order.

- When you add a future order to the system, ATO stores the order detail in a SQL database until the time at which you release the order. An order becomes an active POS order at the time of its release and is removed from the SQL database using the Future Order void reason.
- When a customer calls to cancel an order, ATO uses the Canceled Order void reason to void the check. You determine if the Canceled Order void reason affects inventory or not, based on if you can prevent the items from being prepared or can reuse the items, or if you typically prepare and waste the items as a result of a canceled order.

To create the ATO void reasons:

1. Select **Maintenance > System Settings > Void Reasons**.
2. Click **New** to create a new void reason.

- Under the 'Settings' group bar, type a **name** for the future order void reason in 'Description.'

The screenshot shows the 'Void Reasons' configuration window. At the top, a dropdown menu is set to '99 Future Order'. Below this, a 'Settings' section is expanded, showing a table with the following data:

Setting	Value
Number	99
Description	Future Order
Return voided items back to inventory	<input type="checkbox"/>
For Aloha Connect Use Only	<input checked="" type="checkbox"/>
Do Not Report	<input checked="" type="checkbox"/>

Figure 3 Future Order Void Reason

The screenshot shows the 'Void Reasons' configuration window. At the top, a dropdown menu is set to '99 Canceled Order'. Below this, a 'Settings' section is expanded, showing a table with the following data:

Setting	Value
Number	98
Description	Canceled Order
Return voided items back to inventory	<input type="checkbox"/>
For Aloha Connect Use Only	<input type="checkbox"/>

Figure 4 Canceled Order Void Reason

- Select or clear **Return voided items back to inventory based** on the following criteria:
 - For the Future Order void reason, clear **Return voided items back to inventory**, as these items are not ordered.
— OR —
 - For the Canceled Order void reason, select **Return voided items back to inventory**, if you can prevent the items from being prepared or can reuse the items; clear Return voided items back to inventory, if you typically prepare and waste the items as a result of a canceled order.
- Select **For Aloha Connect Use Only** for both void reasons to prevent these void reasons from appearing on the Aloha POS FOH void screen. This prevents the mis-use of the void reason by managers.
- Select **Do Not Report** for the future order void reason.
- Clear **Do Not Report** for the canceled order void reason.
- Click **Save** and exit the **Void Reasons** function.

To associate the new void reasons with Aloha Takeout:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.

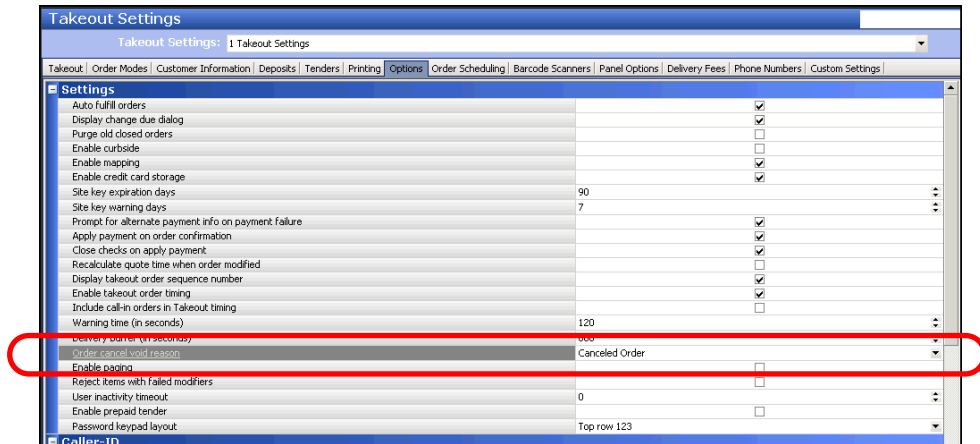


Figure 5 Order Cancel Void Reason

2. Under the 'Settings' group bar, select the **void reason** you created for canceled orders from the 'Order cancel void reason' drop-down list.

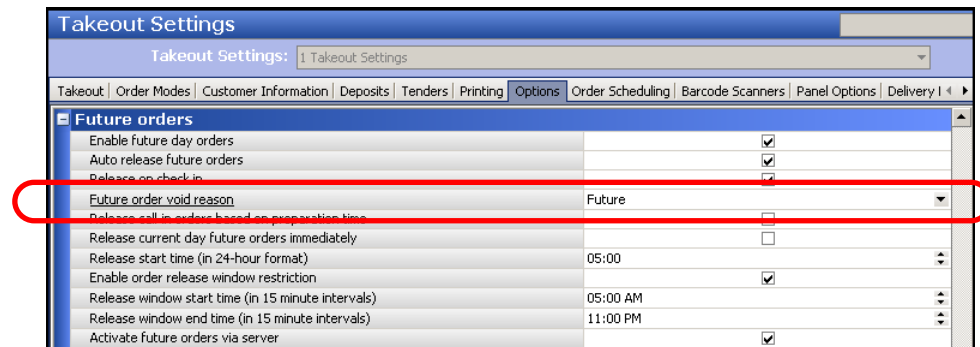


Figure 6 Future Order Void Reason

3. Under the 'Future orders' group bar, select the **void reason** you created for future orders from the 'Future order void reason' drop-down list.
4. Click **Save**.

Creating tenders

In addition to credit card and cash tenders, you must create other tenders to support Aloha Takeout for such things as a prepaid tender and a deposit tender.

Creating a prepaid tender

Aloha Takeout requires a prepaid tender to tender online orders in the POS system in which you process the payment card from the online ordering Web site, not through the store.

To create a prepaid tender:

1. With Takeout selected in the product panel, select **Maintenance > Payments > Tenders > Tender** tab.
2. Click the **New** drop-down arrow, select **Generic** as the tender type, and click **OK**.
3. Under the 'Settings' group bar, type a **name** to easily identify this as the delivery prepaid tender.
4. Select **Active**.
5. Select **Track**.
6. Under the 'Overpayment' group bar, clear **Allow overpayment** and under the 'Tips' group bar, clear **Allows tips**. This is necessary, as the delivery company pays the exact amount on the checks.
7. Do not select **any options** on the Type tab, as the prepaid tender is a 'non-cash' generic tender.
8. Click **Save** and exit the **Tenders** function or continue to the **next procedure**.

Creating a deposit tender

Aloha Takeout requires a deposit tender to tender an online order when a customer enters payment card information in Digital Ordering for processing at the store. This prevents items for online orders from being ordered until after the system authorizes the payment and tenders the check.

Note: Digital Ordering requires the payment amount equals the total of the online order.

Aloha Takeout applies the payment as follows:

- a. A Digital Ordering order sends the payment information to the store along with the order information. Aloha Takeout creates a check for the online order and a second check on which to create the deposit and apply the payment information.
- b. Aloha Takeout queries the total for the online order and adds the deposit item to the second check in the amount of the online order total. [See "To create a deposit item:" on page 26.](#)
- c. Aloha Takeout applies the payment card in the amount of the online order total to the second check and authorizes the payment using the stores payment card processing system, such as Aloha EDC.
- d. After the processor authorizes the payment, Aloha Takeout closes the second check, orders the items on the first check associated with the online order, and applies the deposit tender to the check in the amount of the deposit. If the payment is not successful, Aloha Takeout sends a message to Digital Ordering, prompting the customer to enter valid payment information or choose to pay at the store.

Note: Depending on your operation, you may select 'Close checks on apply payment' in Maintenance > Takeout Configuration > Takeout Settings > Options tab. This functionality does not require an employee to recall the check to close the online order when the check is fully tendered.

To create a deposit tender:

1. Select **Maintenance > Payments > Tenders > Tender** tab.
2. Click the **New** drop-down arrow, select **Generic** as the 'Tender type,' and click **OK**.
3. Under the 'Settings' group bar, type a **name**, such as Deposit, to easily identify the deposit tender.
4. Select **Active**.
5. Select **Track**.
6. Under the 'Overpayment' group bar, clear **Allow overpayment** and under the 'Tips' group bar, clear **Allows tips**, because the system applies the exact amount of each deposit using this tender.
7. Do not select **any options** on the Type tab, as the deposit tender is a 'non-cash' generic tender.
8. Click **Save** and exit the **Tenders** function or continue with the **next procedure**.

You must create items for the Deposit feature. Once you create all deposit components, align the deposit tender in Aloha Takeout Configuration. See [“Configuring deposits for online order payments” on page 32.](#)

Aligning POS tenders to Aloha Takeout

Use the Tenders tab in Takeout Settings to specify the Aloha POS tenders available to Aloha Takeout. Aloha Takeout uses the Aloha POS tender to specify payment card tenders received from Digital Ordering and authorized against a deposit check.

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

To align a POS tender in Aloha Takeout:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Tenders** tab.
2. Click the **Add** drop-down arrow, select an **Aloha Takeout tender type**, and click **OK**.
3. Select a **POS tender** created for use with Aloha Takeout from the ‘Tender ID’ drop-down list.
4. Select **Available for deposits** for all tenders a customer can enter through Digital Ordering.
5. Type the **text** to appear on the button in ‘Description.’
6. Repeat this **procedure**, as necessary, to specify each tender accepted from Digital Ordering.
7. Click **Save**.

Creating items

To support Aloha Takeout, you must create the following items in the Items function: Deposit and Unavailable Item Indicator. Do not attach these items to a submenu or panel, so employees cannot add them to a check through the Aloha POS system.

Creating a deposit item

You must create a deposit item to support applying payment information associated with online orders.

To create a deposit item:

1. Select **Maintenance > Menu > Items**.
2. Click the **New** drop-down arrow, select **Standard** as the item type, and click **OK**.
3. Under the 'Settings' group bar, type a **name** for the deposit item in 'Short name.' The system automatically populates 'Chit name' and 'Long name' when you save.
4. Select **Ask for description** to enable the system to replace the 'Short name,' 'Chit name,' and 'Long name' with deposit information on the check.
5. Under the 'Assignments' group bar, select a **tax group** associated with a tax type for which there is a zero percent tax rate. Do not define a tax group for which there is a tax rate other than zero percent for the deposit item. Aloha Takeout cannot fully tender the check, if the POS system calculates tax on this item.

⚠ Caution: Do not define a tax group for which there is a tax rate other than zero percent for the deposit item. Aloha Takeout cannot fully tender the check, if tax is calculated on this item.

6. Select a **category** under which you would like deposits to report from the 'Sales/retail category' drop-down list.
7. Select the **Pricing** tab.

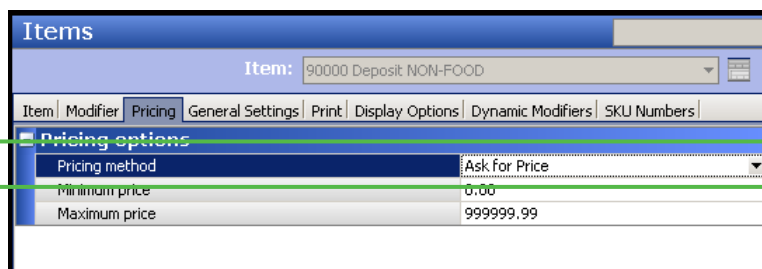


Figure 7 Deposit Item Pricing

- Under the 'Pricing options' group bar, select **Ask for Price** from the 'Pricing method' drop-down list. The system automatically enters the price based on the payment amount sent from Digital Ordering.

Note: To make 'Ask for Price' available in the 'Pricing method' drop-down list, you must clear 'Restrict price edit.' To access 'Restrict price edit,' navigate to Maintenance > Business > Additional Features > Restriction settings bar.

- Select the **General Settings** tab.

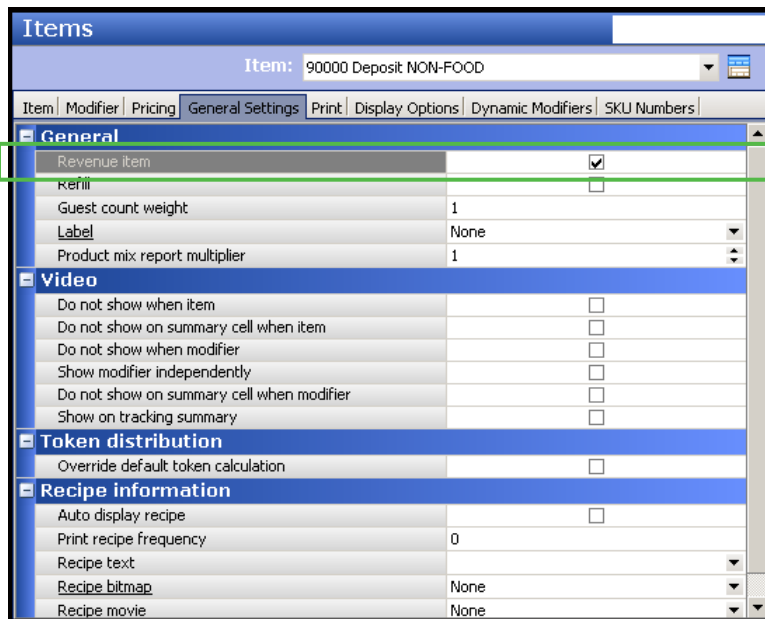


Figure 8 Item Maintenance > Items > General Settings > Revenue Item

- Under the 'General' group bar, select **Revenue item**.
- Click **Save** and exit the **Items** function or continue to the **next procedure**.

Note: Items configured as 'Revenue items' in the Aloha POS do not affect sales. When Aloha Takeout creates a deposit check using the deposit item, the system does not recognize this transaction as sales. See ["Configuring deposits for online order payments"](#) on page 32.

Creating an unavailable item indicator

The unavailable item indicator prints on the kitchen chit when the system cannot order an item when releasing a future online order because:

- The parent item has become unavailable in Item Availability in the POS system between when the customer placed the online order and Aloha Takeout released the order.
- A modifier associated with the parent item has become unavailable in Item Availability in the POS between when the customer placed the online order and Aloha Takeout released the order.

- Modifier requirements are not met. This occurs when the modifier requirements vary between the POS and online ordering systems.
- The parent or modifier item ID was deleted in Item Maintenance. This occurs when the POS and online ordering databases are out of sync.

An * Unavailable Items * section prints on a kitchen chit in the header, alerting you that there are unavailable items on the order. This feature forces a kitchen chit to print, even when there is only one item on the order and it is unavailable.

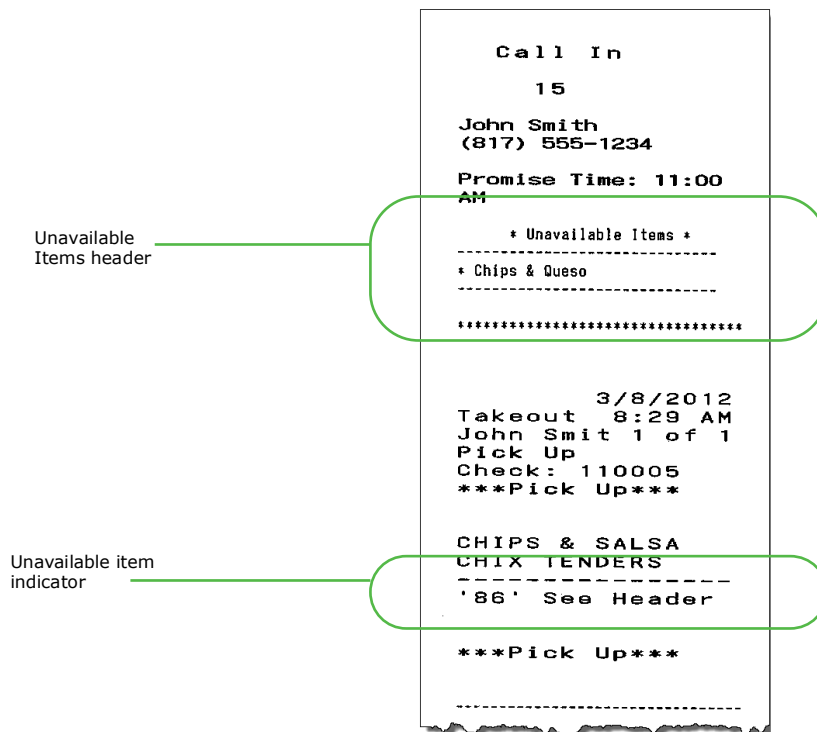


Figure 9 Unavailable Item on a Kitchen Chit

To create an item for use as the unavailable item indicator:

1. Access **Maintenance > Menu > Items > Item** tab.
2. Click the **New** drop-down arrow, select **Standard**, and click **OK**.
3. Under the 'Settings' group bar, type **text** in 'Chit name,' to alert you Aloha Takeout could not order an item when releasing an online order.
4. Under the 'Assignments' group bar, select a **tax group** associated with a tax type for which there is a zero percent tax rate.
5. Select the **sales/retail category** under which you would like the unavailable items to report.
6. Select the **Pricing** tab.

7. Under the 'Pricing options' group bar, select **Item Price** from the 'Pricing method' drop-down list.
8. Set the 'Default price' to **0.00**.
9. Select the **Print** tab.
10. Under the 'Check printing' group bar, select **Print on check when price is zero**.
11. Click **Save** and exit the **Items** function or continue with the **next procedure**.

To route the POS item for use as the unavailable item indicator to all kitchen printers:

1. Access **Maintenance > Menu > Item Routing**.
2. Select the **item** you created to indicate unavailable items from 'Available' and click the right arrow to move it to 'Included.'
3. Select the **item** you created to indicate unavailable items in the previous step, click the **printer group** drop-down list, and select a **printer group** that includes all kitchen printers to alert you of a missing item no matter where you are standing in the kitchen.
4. Click **Save** and exit the **Item Routing** function.

Note: Do not associate the item created to indicate an unavailable item to a button on a submenu or modifier panel.

To associate the POS item as the 'Unavailable item indicator' in Aloha Takeout:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Printing** tab.
2. Under the 'Printing' group bar, select **Include unavailable items on kitchen chit**.
3. Select the **item created in the POS as the unavailable item indicator** from the drop-down list.
4. Click **Save**.

Configuring ATO specific settings

Configuring payments to auto apply

You must configure payments to apply automatically to allow Aloha Takeout to apply payments received from Digital Ordering. The payment is authorized and appears on the check in the Aloha POS when a consumer places an online order. You must access Takeout Settings > Options > Settings tab and set 'AutoApplyAllOrderPayments' to True in the Custom Settings function.

To configure Aloha Takeout to automatically apply payments from Digital Ordering:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Settings > Options > Settings** tab.

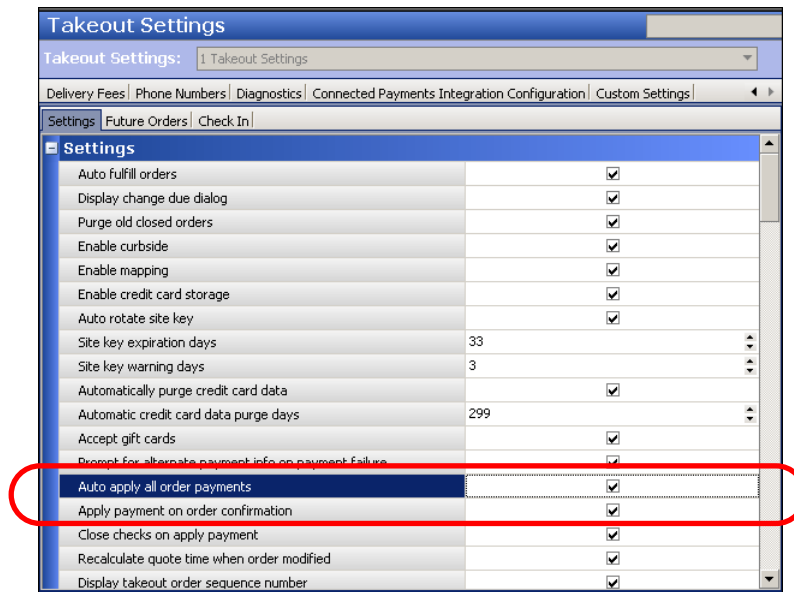


Figure 10 Takeout Settings - Options - Settings Tab

2. Under the 'Settings' tab, select **Auto apply all order payments** to automatically apply all payments.
3. Select **Apply payment on order confirmation** to retrieve stored payment card information and request authorization from the order confirmation screen.
4. Click **Save** and continue to the **next procedure**.

To add the AutoApplyAllOrderPayments custom setting:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Settings > Custom**.
2. Click **Add**.

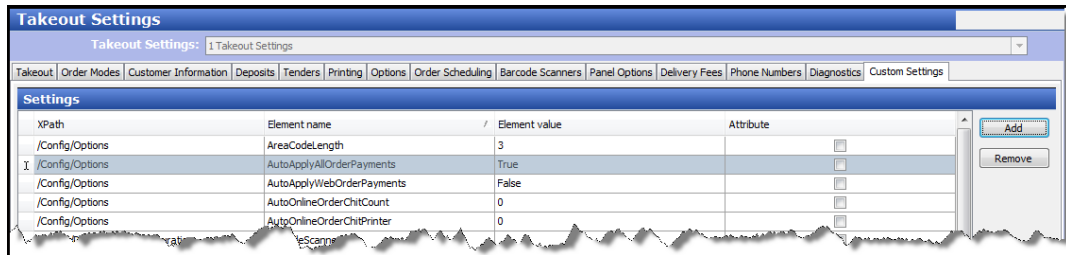


Figure 11 Auto Apply All Order Payments

3. Type **/Config/Options** in 'XPath.'
4. Type **AutoApplyAllOrderPayments** in 'Element name.'
5. Type **True** in 'Element value.'
6. Click **Save**.

Specifying the Aloha POS product

Aloha Takeout activates specific program assumptions based on the capabilities inherent in the core POS product. For this reason, you must specify which POS product you are using in Takeout Settings. The Takeout tab contains site and POS integration information.

To specify the POS product:

1. With Takeout Selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Takeout** tab.
2. Under the 'Identification' group bar, select your core **POS product**, Table Service or Quick Service.
3. Click **Save**.

Configuring deposits for online order payments

Use the Deposits tab to enable the Deposits feature, and help you specify how Digital Ordering, Aloha Takeout, and the Aloha POS interact to prepay online orders and confirm the payment is authorized before the system releases the online order.

⚠ Caution: You must configure deposits if you accept payment information from Digital Ordering through Aloha Takeout.

To configure deposits for online order payments:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Deposits** tab.
2. Select **Enable deposits**.
3. Select the **tender** you created for use with deposits from the 'Deposit tender' drop-down list.
4. Select the **order mode** to apply when the system creates a deposit check from the 'Deposit order mode' drop-down list.

⚠ Caution: Do not configure a service charge for the deposit order mode or select an order mode with a service charge, such as delivery. Aloha Takeout cannot fully tender the deposit, if you configure a service charge.

We recommend you create a dedicated non-Aloha Takeout order mode with no surcharges configured.

5. Select the **item** you specifically created for adding a deposit to a guest check from the 'Deposit revenue item' drop-down list.
6. Clear **Print deposit receipts when collected, refunded, or surrendered** to print a guest check any time you complete an activity related to deposits.

Configuring printing

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

Select the default values to use for guest checks and kitchen chits. Examples of kitchen chits for walk-in and call-in orders, showing the type of information contained in each, appear below:

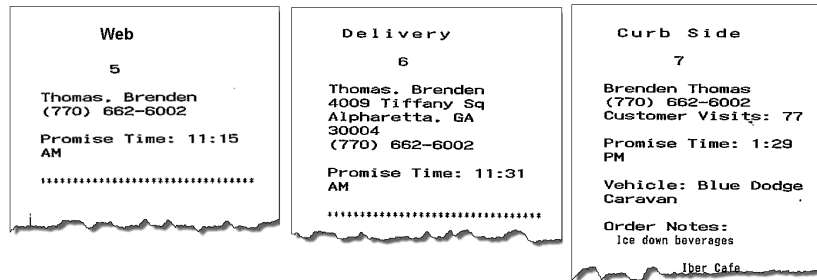


Figure 12 Examples, ATO Headers for Kitchen Chits

Aloha Takeout headers contain the following information by order type:

- **Web:** Customer name and phone number.
- **Delivery:** Customer name, phone number, and address.
- **Curbside:** Customer name, phone number, and vehicle make, model, and color.

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


- **Bag Chit:** Contains future order customer and order summary information. The customer or the store can use this as a record. Bag chits do not contain pricing information.

Options available on the Printer tab in Takeout Settings control the printing of certain information for the benefit of 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 note types used within Aloha Takeout that you can control with various print options. As a general rule, you should train employees to enter helpful operational information, and not information that would offend a customer. The purpose of using printing options is to separate store-facing operational information from customer-facing.

- **Guest notes** are stored in the guest profile, and should contain store-facing information to help service customer needs. Examples include allergy information or a customer's specific requests for every order. Guest notes do not print on the guest check 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. Order notes print on kitchen chits by default. You can choose to print order notes on guest checks and driver itineraries.
- **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. You can choose to print address notes on guest checks and kitchen chits.

 **Tip:** You must configure Digital Ordering to support each of these note types and the online order information must contain note information for this feature to work.

To configure printing options:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Printing** tab.
2. Under the ‘Printing’ group bar, select **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.
3. Select **Print Promise Time on Guest Check** to print the promise time associated with an order in the Aloha Takeout header section of the guest check.
4. Select the number of **guest checks** to print when Aloha Takeout finalizes and send orders to the kitchen from the ‘Print Order Items Receipt Count’ drop-down list. Employees use these guest checks to organize online orders for pickup. The guest check prints to the printer defined in ‘Default printer’ on the interface terminal.
5. Select **zero** from the ‘Apply Payment Receipt Count’ drop-down list to not print a guest check when you apply a payment to a check through Aloha Takeout.
6. Type the **text** to precede the promise time in the Aloha Takeout header on guest checks, kitchen chits, and other ATO-controlled print jobs in the ‘Promise Time Label.’ Do not include a colon in the character string as Aloha Takeout automatically adds a colon. Limit the number of characters to 12, if possible, to avoid line wrapping.
7. Type the **text** to precede the promise date in the Aloha Takeout header on guest checks, kitchen chits, and other ATO-controlled print jobs in the ‘Promise Date Label.’ Do not included the colon in the character string. Aloha Takeout automatically adds the colon. Limit the number of characters to 12, if possible, to avoid line wrapping.
8. Type the **text** to print as the ‘Add-on Chit Header Label’ in the Aloha Takeout header on kitchen chits. This feature is effective when Digital Ordering sends additional items to an existing online order. The default text is “Add On.”
9. Select **where** on the chit you would like the header to print from the ‘Chit header printing’ drop-down list. This allows you to print the header at the top, bottom, or top and bottom of a chit.

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.

10. Select **where** on the guest check you would like the header to print from the 'Receipt header printing' drop-down list. This allows you to print the header at the top, bottom, or top and bottom of a guest check. This makes it more visible in certain configurations and usages, such as when stapling a guest check to the top of a paper bag.
11. Select **Print guest notes on kitchen chit** if the kitchen should be aware of guest notes on an Aloha Takeout order. This makes guest note information available during food preparation.
12. Select **Print chit on final bump** to print a 'bag chit' when you bump the last item on an order from Aloha Kitchen. You can use the bag chit for final assembly of an order and staple it to the bag. You must install Aloha Kitchen for this feature to work.
13. Select **Print change chit when order cancelled or mode changed** to alert the kitchen staff when an order taker adjusts an existing order. Aloha Takeout prints an updated chit to the kitchen allowing the kitchen staff to address the changes.
14. Select **Enable future order statement** to add the Print Statement button on the Aloha Takeout Order Details screen. The future order statement prints a summary of the order, including prices.
15. Click **Save**.

Configuring general options that affect ATO functionality

You must make several decisions about how you want your online ordering 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.

Located under the 'Settings' group bar on the Options tab are numerous options of a general nature that define how your online ordering system functions.

To configure general options that affect how your Aloha Takeout system functions:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Select **Auto fulfill orders** to have the Aloha Takeout change an online order status to closed, when you close the order in the POS.
3. Select **Enable credit card storage**, if you want 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 to appear unmasked. You must set the site key in the Takeout Data Protection Tool for this feature to work. This is only used with EDC.
4. Select **Reject items with failed modifiers** to prevent releasing the parent item when a modifier is designated as "unavailable" in Item Availability. This feature affects future and online orders when releasing items to the POS system. For example, when enabled, if you modify fajitas with chicken, yet chicken is unavailable, the system will not release the fajitas item, and follows the Aloha Takeout 'unavailable item' functionality. Enable this option depending on the impact of modifiers on the parent item and the ability of the kitchen to prepare any item if a modifier is missing. In most cases we recommend enabling this option.
5. Click **Save**.

Configuring future orders

You must enable future orders for your Digital Ordering orders to release within Aloha Takeout.


 **Caution: You must enable future orders for your Digital Ordering orders to release within Aloha Takeout.**

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the 'Future orders' group bar, select **Enable future day orders**. Enabling this feature activates the ability to create online orders, which behave similar to future orders.
3. Select **Activate future orders via server**. Enabling this feature releases future orders from the BOH without the need for an ATO instance running on a FOH terminal. For this new functionality

to work properly, the ATO service should be configured to start an instance of the Aloha POS on the BOH system. Note: Select this option only if you are using ATO Order Manager.

4. Click **Save**.

Configuring auto database backup


 **Reference:** For detailed information on configuring the auto database backup feature, Refer to the Aloha Takeout Backup and Restore Feature Focus Guide.

Configuring system parameters

You must correctly specify the Service Host IP address for terminals to communicate with the host after the initial installation. You must also enable Aloha Takeout start the POS interface.

To specify the IP address for the service host:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > System Parameters**.
2. Under the 'Service' group bar, type the **IP address** of the Aloha NIC of the Aloha BOH file server in 'Service host.'

 **Note:** This must be the IP address associated with the first NIC listed in the Connection list box. See ["Preparing Aloha POS for ATO" on page 10](#).

3. Select **Start POS interface** to allow the Radiant TakeOut and Delivery service to launch the instance of Aloha used as the interface server on the Aloha BOH file server.
4. Click **Save**.

Refreshing data

After all settings are in place in Aloha Manager, you must select **Utilities > POS > Refresh POS & All Installed Products** to transfer the new information to the FOH terminals, or wait for the EOD process to accomplish the data refresh for you. If you run the refresh prior to the EOD process, select 'Automatically restart all POS terminals' and click OK to continue. After the data refresh is complete, all new settings become operational across the Aloha network.

 **Caution: Refresh data with caution and never during peak hours of operation. All FOH terminals reboot during a refresh and are down for a short period of time.**

Specifying the account for the Radiant TakeOut and Delivery service

You should change the user account used by the Radiant TakeOut and Delivery service to log in from the default 'Local system' user account to the user account used by the CtlSvr and EdcSvr services.

This provides an additional level of security for payment applications, such as Aloha Takeout and Digital Ordering.

Tip: The user account used by the Radiant TakeOut and Delivery service must have administrative rights. If there is not an existing account created for Aloha services, you must create one.

To change the log on account:

1. Type **Services.msc** in the Run command.
2. Locate the **Radiant TakeOut and Delivery service** in the services list, right-click, and select **Properties**.

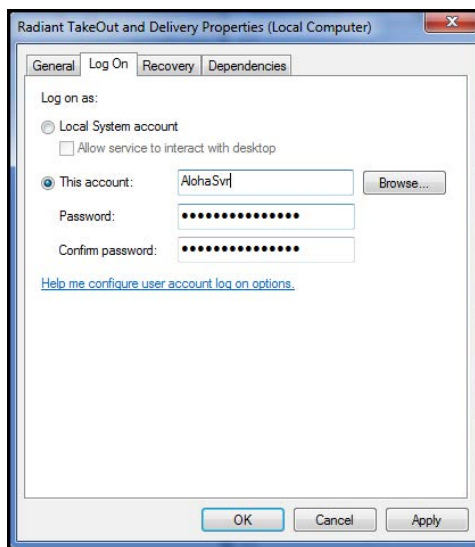


Figure 13 Service Properties

3. Select the **Log On** tab.
4. Select **This account**.
5. Type the **name of the account** to use for Aloha Services.
6. Type the **password** and repeat to confirm the password.
7. Click **Apply** and **OK** to exit the Properties dialog box.
8. Close the **Services** window.

Restarting the Radiant TakeOut and Delivery Service

You must restart the Radiant TakeOut and Delivery service when you make a change to ATO system parameters and other functions managed by the service. This allows Aloha Takeout to function correctly.

Access services, locate the Radiant TakeOut and Delivery service, and select Restart to restart the service and allow it to read the latest configuration.

Configuring optional features

There are several functions you can configure or customize to your business needs, from when the ATO end-of-day runs, delivery fees, bag manifests, and more.

Configuring when ATO runs end-of-day

We recommend the ATO end-of-day (EOD) runs at the same time as the Aloha POS end-of-day, which is the default setting. This section discusses verifying this configuration in the event it was changed when importing Aloha Takeout data.

To configure ATO EOD:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the 'End of Day' group bar, clear **Enable scheduled EOD**.

Note: 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.

ATO uses a 24-hour clock, not the 48-hour clock used by the POS. For example, set the 'Scheduled time' to 3:00 for 3:00 AM, not 27:00, as you would in the POS.

3. Leave **Historical data retention days** at the 400 day default or type a **number of days** that better suits your drive space and operational needs.
4. Click **Save**.

Configuring order scheduling

Reference: See the ATO Order Scheduling Feature Focus Guide for information on implementing order scheduling.

Enabling delivery fees

Use the options available on the Delivery Fees tab to enable and support the Delivery Fees feature. Select and configure fees you want to add to delivery orders, based on several different criteria. You can stack multiple delivery fee calculations 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.

Note: Delivery fees calculate only on online orders using the Delivery order mode.

Use delivery fees to offset operational costs associated with delivery orders, such as packaging, utilities, and driver fees. The system recognizes delivery fees as store revenue, which reflects in the 'Order Mode Charges' section of the sales report, when configured. The system limits driver fee calculations to the amount of the delivery fee; therefore, we recommend you configure delivery fees to exceed the driver fee calculated amount for all orders.

When you enable delivery fees, Aloha Takeout calculates the fees based on the configured options and passes the calculated amount back to Digital Ordering to update the customers total. 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.

To configure delivery fees:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Delivery Fees** tab.
2. Click **Add** and select an **order mode** from the drop-down list to activate the delivery fee feature. Other delivery fee options appear. Select one or more of the following delivery fees based on your operational needs.
3. On the Delivery Fees tab, configure the following options, as necessary.
 - Select **Enable minimum delivery fee** to cover standard operational costs associated with delivery. This feature works with variable mileage-based delivery fees, such as check percentage and distance from store, or when you stack a variable fee as part of a delivery fee calculation.
 - Type the **Minimum delivery fee amount (in dollars)** for Aloha Takeout to override, if the calculated delivery fee is below this amount.
 - Select **Enable maximum delivery fee** to define the maximum delivery fee amount to charge a customer. This feature works with variable mileage-based delivery fees, such as check percentage and distance from store, or when you stack fees as part of a delivery fee calculation.
 - Type the **Maximum delivery fee amount (in dollars)** for Aloha Takeout to override, if the calculated delivery fee is above this amount.
 - Under the 'Check percentage' group bar, select **Enabled** to have the system calculate the delivery fee as a percentage of the subtotal of each delivery check.
 - Type the **percentage** in 'Check percentage.'
 - Under the 'Flat amount' group bar, select **Enabled** to have the system add an amount to each delivery order, then type an **amount** in 'Flat amount.'
 - Under the 'Distance from store' group bar, select **Enabled** to have the system calculate the delivery fee based on the distance between the store and the delivery address, then type the **amount** per distance unit in 'Distance from store (based on mapping).'

If you use mapping, the system uses the amount multiplied by the distance from the store to a delivery address.

If you do not use mapping, you must enter an amount in 'Distance' within Delivery Area, Zone, Neighborhood, or Street functions, for the system to calculate the delivery fee.

- Select **Mile** or **Kilometer** in 'Distance unit.'



Reference: For more information on configuring and using delivery areas, refer to the ATO Delivery Area Feature Focus Guide.

- Under the 'Delivery zone' group bar, select **Enabled** to have the system use the 'Delivery fee' defined in Maintenance > Takeout Configuration > Delivery Areas > Zone for each zone. Type an **amount** in 'Delivery zone default fee' that the system uses when a zone does not have a 'Delivery fee' defined.
 - Under the 'Day Parts' group bar, select **Enabled** to have the system use the delivery fee associated with the active day part. Click the **arrows** to move selected **day parts**, defined in the POS, from the Available frame to the Included frame. Type an **amount** for each day part.
4. Select the **Day Parts** group.
 5. In the 'Available' list box, select the **day parts** to which to apply the delivery fee, and click the **right arrow**.
 6. Repeat this **procedure** for each order mode that requires a delivery fee, and click **Save**.

Configuring Aloha Takeout to integrate with 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. The options for Aloha Kitchen integration apply only if you are using Aloha Kitchen.

Note: If you are not using Aloha Kitchen, clear 'Enable Kitchen interface' and disregard all of these options.

To configure Aloha Kitchen integration:

1. With Aloha Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the 'Kitchen integration' group bar, select **Enable Kitchen interface** to enable communication between Aloha Takeout and Aloha Kitchen. When selected, all other Aloha Kitchen integration options appear.
3. Select **Suppress POS chit printing** to disable chit printing from within Aloha Takeout, when using Aloha Kitchen. The system relies on Aloha Kitchen to display and manage all order information.
4. Type the number of **seconds** equal to the pizza oven conveyor belt timer in 'Oven time (seconds)', if you do not consider items prepared until they are the oven.
— OR —
Type **zero** (0) in 'Oven time (seconds),' if you bump items when they are fully prepared.


Note: The system uses this setting to determine when an item is placed on the rack as part of the 'Rack Time Average' calculation.

5. Use the arrows or type **1800** in 'Rack time average span (seconds)' to calculate the average time an item sat on the rack before being dispatched, over the last 30 minutes. Adjust this option to meet your reporting needs.
6. Select **Use Kitchen quote times** to provide employees and customers more accurate quote times based on data in Aloha Kitchen regarding item cook times, the number of items pending and cooking, kitchen performance, and other factors.
7. Click **Save** and exit the **Takeout Settings** function.


Configuring tax by destination

Reference: For detailed information on configuring and using tax by destination, refer to the ATO Tax by Destination Feature Focus Guide.

Configuring bag manifest printing


 **Reference:** For detailed information on configuring and using bag manifests printing, refer to the ATO Bag Manifests Feature Focus Guide.

Label printing


 **Reference:** For more information on configuring and using label printing, refer to the ATO Label Printing Feature Focus Guide.

Configuring sundries

As part of the bag manifests feature, Aloha Takeout allows you to add sundries. Sundries are items, such as plastic ware, salt and pepper, mustard, ketchup, mayonnaise, and other items, you provide to your customers to enjoy their meal. You can associate food items with sundries and have those sundries automatically print on bag manifests, which enables your employees to know which sundry items to include with an order. Additionally, Aloha Takeout includes a sundry substitution enhancement. You can configure a sundry item to consolidate into a larger item when it meets configured numeric thresholds. For example, instead of sending fifty plastic spoons, you can configure the system to send a box of plastic spoons.

 **Reference:** For more information on configuring sundries, refer to the ATO Bag Manifests Feature Focus Guide.

Sundry substitution

 **Reference:** For more detailed information on configuring and using Sundry Substitution, refer to the ATO Bag Manifests Feature Focus Guide.

Testing the Aloha Takeout and Digital Ordering connection

To test the connection between Aloha Takeout and Digital Ordering, you must remove the site from 'Demo Mode' in Web Admin. To do this, open a support ticket with support@alohaenterprise.com. Once the store has been takeout out of 'Demo Mode,' navigate to Web Admin to Configuration > Site Setup > Sites > Test Site.

If the store appears green and contains no errors, your Aloha Takeout configuration is correct and complete. Place an order to the store in Web Admin, navigate to Order Management > Start Order to launch the classic Aloha Online Ordering site. Confirm the order releases to the kitchen video screens and printers (where configured), and appears on the POS with payment information.

Using the Takeout Console

Note: This section only applies if you use Aloha Takeout Order Manager, as opposed to the full Aloha Takeout product.

The Aloha Takeout Console allows you to manually adjust orders from the back-of-house. Using this tool, you can manually release online orders, cancel online orders, and reactivate online orders that were released or canceled in error. Clicking Force EOD at the bottom of the screen clears all orders in ATO Order Manager.

To launch Takeout Console:

1. Navigate to **%\Bootdrv\Aloha Takeout\Bin**.
2. Locate and double-click **TakeoutConsole.exe**. The Aloha Takeout Console screen appears.

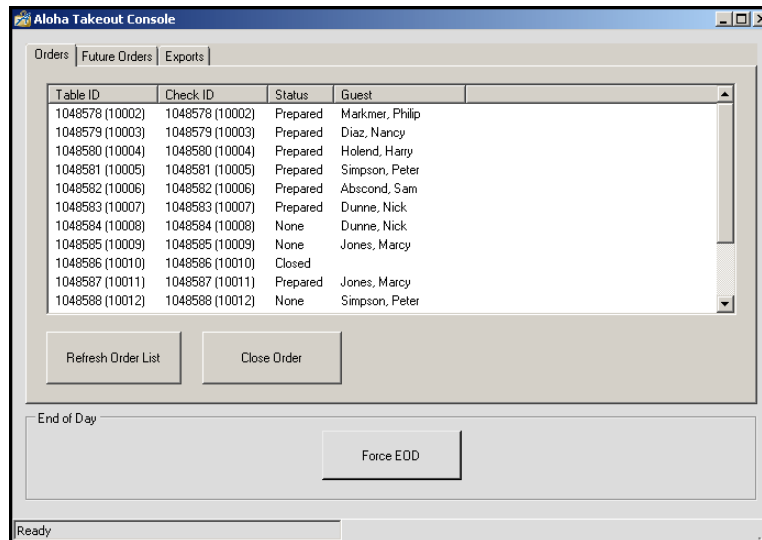


Figure 14 Takeout Console > Orders Tab

To release, cancel, or re-activate an online order:

Use the Future Orders tab in the Aloha Takeout Console to release, cancel, or re-activate an online order.

1. With the 'Future Orders' tab active, click **Refresh Order List**. A list of all future orders appears.

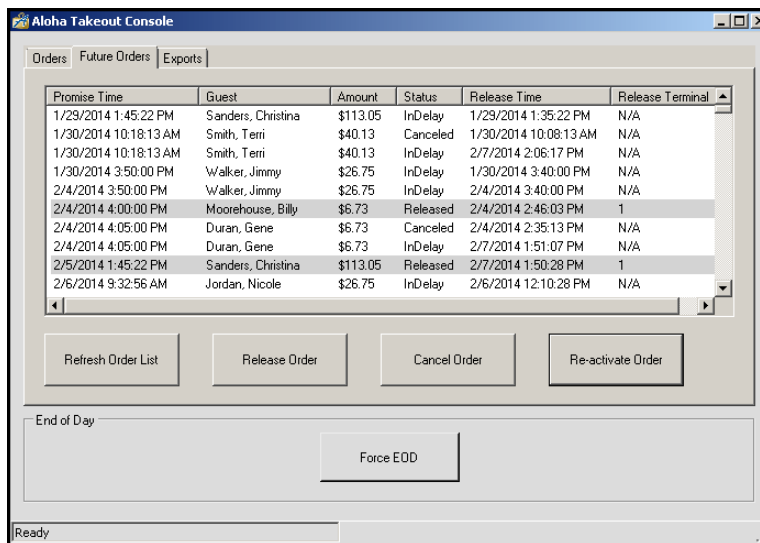


Figure 15 Takeout Console > Future Orders Tab

2. Locate and select an **online order**.
3. Click **Release Order** to release an online order.
-OR-
Click **Cancel Order** to cancel an online order.
-OR-
Click **Re-activate Order** to re-activate a canceled online order.
A confirmation screen appears for each of the above actions.
4. Click **Yes**.

Aloha Digital Ordering and Aloha Takeout, Integration Guide

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