

# **Aloha Quick Service v19.9 Screen Designer Guide**

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# Revision Record

Date	Version #	Description of Change
09/15/2022		Updated to use new templates.
09/18/2023	v19.9	Added two new button functions: <ul style="list-style-type: none"><li>• Gift Card Query Balance For Tender</li><li>• Multiple Item Scanning</li></ul>
07/17/2024		Updated document to reflect NCR Voyix branding.



# Contents

<b>About this guide</b>	1
Is this guide for you?	1
Conventions used in this guide	2
<b>About Screen Designer</b>	3
<b>Understanding owners in Screen Designer</b>	5
<b>What's new in Screen Designer</b>	6
<b>How to use Screen Designer</b>	10
Determining the POS screens you need	14
Building a Quick Service screen	21
<b>Getting started</b>	30
Introducing Panel Editor	32
<b>Working with panels</b>	37
What you can do with panels	39
<b>Working with buttons on a panel</b>	52
What you can do with buttons	57
Scheduling an 'Activate Panel Button' event	69
<b>Working with screens</b>	70
Introducing Screen Editor	72
What you can do with default screens	73
Testing screens with Screen Simulator	80
What you can do with screen simulator	83
<b>Activating screens</b>	85
Assigning a default screen to a job code	85
Assigning a default screen to a terminal	86
Restricting access to all default screens	87
Scheduling a Set Job Screen event	89
<b>Appendix A: Properties window descriptions</b>	90
Button window properties	96
Image window properties	100
Button Grid window properties	102
<b>Appendix B: Button function descriptions</b>	103
<b>Appendix C: Widget function descriptions</b>	148



## About this guide

The Aloha® Quick Service Screen Designer Guide describes how to build panels and screens for your order entry system. This guide helps familiarize you with the basic and advanced features of Screen Designer, and provides overview, procedural, and field-level descriptions, as necessary.

## Is this guide for you?

The Aloha Quick Service Screen Designer Guide is intended for anyone who is responsible for creating the panels and screens that appear on the Aloha Quick Service order entry screen. A new user might read the entire guide to gain an understanding of what Screen Designer is and how it is designed to operate. An experienced user that already has the basic knowledge to use Screen Designer might access this user guide to look up specific option descriptions, or to revisit procedural information, as necessary.

The Aloha Quick Service Screen Designer Guide also has a detailed index that includes every option you may need to locate, which makes it quick and easy for you to find the information you need.

This guide assumes you have the following knowledge:

- Basic understanding of Aloha Quick Service.
- Basic understanding of restaurant terminology and concepts.
- Basic understanding of PCs and Microsoft® Windows®.
- Understanding of the operation of a computer mouse and keyboard.
- Basic understanding of how to work with Microsoft Windows-based menu structures and basic application components, such as scroll bars, buttons, drop-down lists, text boxes, radio buttons, and check boxes.



## Conventions used in this guide

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

### Text conventions

The following conventions help you recognize specific computer components and identify your interaction with the computer:

Example	Description
Click <b>Save</b> .	Indicates buttons that require activation by a mouse, or by a function key on the keyboard.
Press <b>Tab</b> .	Indicates keys you press on the keyboard.
Maintenance > Labor > Job Codes > Job Codes tab	Indicates the order to use for selecting menu items.
Ctrl+Tab	Indicates key commands. The plus sign indicates to hold down the first key and press the second key.
'Get Check'	Indicates the name of options and other screen elements.

### 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.



#### Caution

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



#### 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.



## About Screen Designer

Screen Designer is a robust tool that enables you to create and modify the Point-of-Sale (POS) screens. From designing the layout of each screen, to specifying which menu items, promotions, manager functions, and employee functions are available on a screen, Screen Designer enables you to define the entire look, feel, and function of your Aloha POS system.

...easy to design



easy to use...





Screen Designer provides tools to easily build custom panels and default screens used for the Aloha Quick Service order entry system. Screen Designer has three main components: Panel Editor, Screen Editor, and Screen Simulator.

- **Panel Editor** enables you to create and edit the panels that combine to create your order entry screen, as well as the buttons and images you want available on each panel. Being able to design an order entry screen with multiple panels offers a tremendous amount of flexibility for your order entry process.
- **Screen Editor** enables you to build your Table Service screens from the selection of existing panels created in Panel Editor. With Screen Editor, you create different screens to target a specific job code, such as a cashier or manager.
- **Screen Simulator** enables you to perform a test on a selected screen, including the panels and buttons used to build the screen. Screen Simulator allows you to drill down to the various sections of a screen and verify that each button operates as designed and that any 'chained' panels link to other panels, as intended, as well as verify the overall layout of all the panels on a screen.

The main question that arises when working with Screen Designer is what do you need to create first, the panels or the screens? Remember, screens are made up of panels; therefore, you need to create the panels you will use for your screens, then create default screens and assign specific panels to the default screens. In some instances, you will go directly to the Work with Screens option, when you already have existing panels, but need to create a new default screen with a different combination of panels.



## Understanding owners in Screen Designer

If you manage multiple sites using CFC, the system requires you to assign an 'owner' to each panel or screen you add to the system. An owner could be the corporate office of a restaurant organization, a specific concept or brand (when an organization has multiple concepts), a franchisee, or an individual store that requires control of specific database records within the database.



### Tip

Owners should already exist in the system, before you start to work in Screen Designer.

The owner assigned to a panel or screen record determines how the panel or screen is filtered, when data is distributed to a store. This provides better control over managing which stores receive specific panels or screens during the data distribution process, within a multi-store, multi-owner organization.

Ownership also affects security of panels and screens. Each owner has an inherent 'record hierarchy level.' The record hierarchy level (Global, Corporate, or Store) attached to the owner becomes attached to the panel or screen record, as well. And it is the record hierarchy level associated with both the owner and record that ultimately determines who can view and edit a panel or screen.



# What's new in Screen Designer

Below are the most significant new or redesigned features to help you easily create and maintain panels and screens for the Aloha POS system.

<div><div>Properties Window</div><div><p>View and edit the attributes for a selected panel or panel elements, such as buttons, using the Properties window.</p><p>The Properties window appears automatically when you select a panel or panel element. Use the Properties window to quickly view or modify the current property settings for panels, buttons, images, and button grids.</p><p>For example, if you click in a panel, the Properties window displays the settings for the selected panel, including the title, font, color, panel ID number, screen location, size, and much more. When you edit a property setting, the change appears immediately.</p></div></div>	<div></div>
<div><div>Button Grid</div><div><p>Create, organize, and resize multiple buttons quickly, with the new button grid tool.</p><p>Specify the number of buttons you want, as well as other attributes, in the Properties window. The buttons snap into place in the grid, when you right-click inside the grid and select 'Fill grid with buttons.'</p><p>The button grid also helps you make layout changes to your buttons, while keeping each button stationary, aligned, and evenly spaced. This is a great way to rearrange existing buttons without moving each button individually.</p></div></div>	<div></div>
<div><div>Panel and Screen IDs</div><div><p>Assign unique record IDs for panels and screens. The record ID for a panel or screen enables you to better organize your screen elements and quickly select them from a list, when you need to modify a screen element.</p></div></div>	<div></div>



### Panel and Screen Versioning

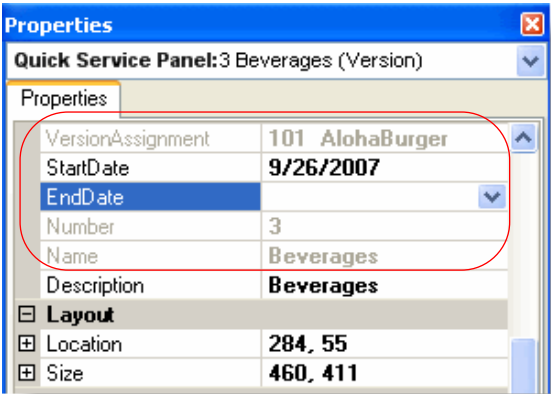
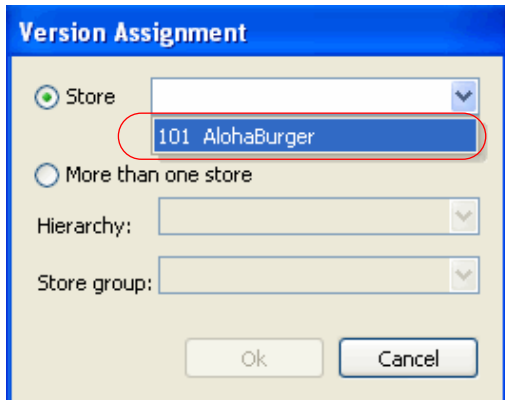
Create versions of a panel to manage store panel variations. Most of the panels you create for your order entry screen are probably used at all store locations; however, when some of your stores need to offer different options on their order entry screen, you can use versioning to support those panel variations at each store. In addition to creating a version of a panel, you can also create versions of the default screens.

You can assign a version to a single store, or a group of stores, when you set up store group hierarchies in the system.

A hierarchy is any classification you find helpful when organizing your stores, such as region, tax jurisdiction, store size, or pricing tier, to name a few. You can use as many hierarchies as you need.

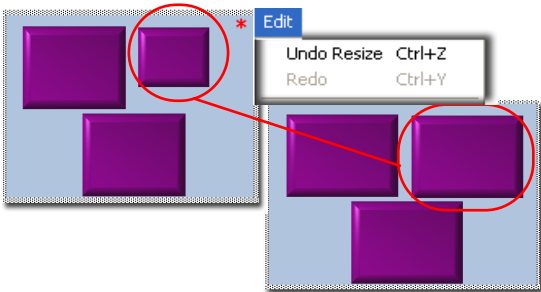
For each hierarchy you define, you can create several store groups to associate to the hierarchy, and then assign stores to each store group.

Any versions you assign to a store group are automatically associated to each store in the store group.

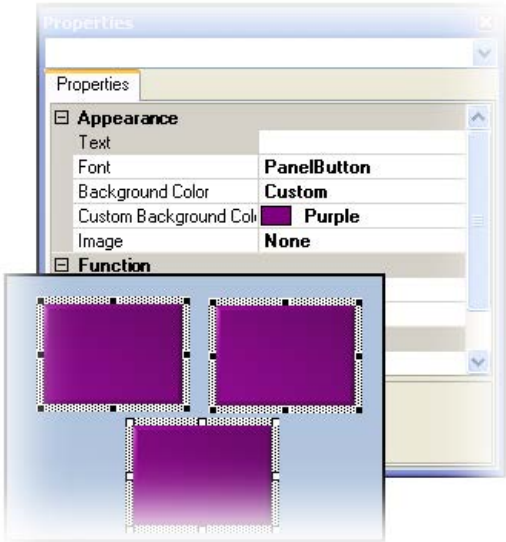
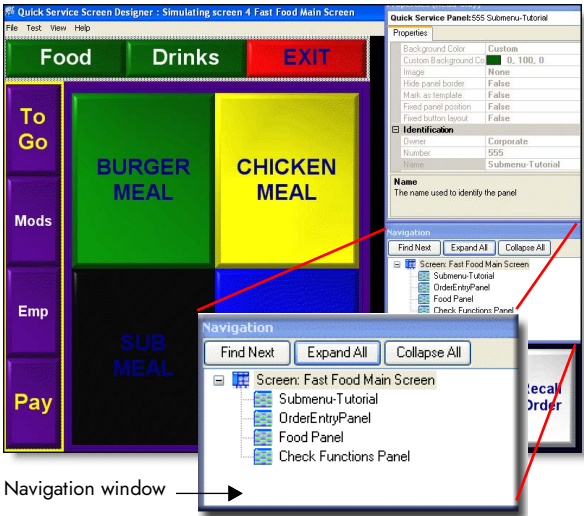


### Undo/Redo Function

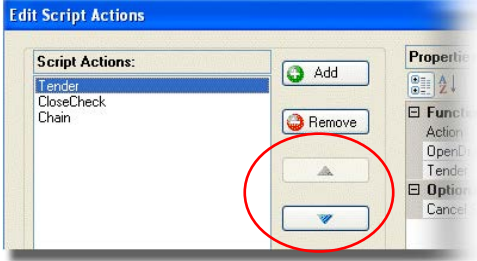
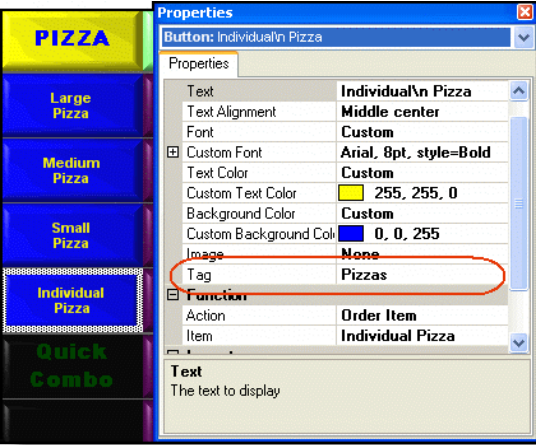

Reverse or repeat a previous action using the handy Undo/Redo options. You can undo or redo most actions, up to the last save. You can also use the Ctrl+Z or Ctrl+Y shortcut keys, to undo or repeat an action.





<div><h3>Multi-Selection Edits (Lasso)</h3><p>Select multiple buttons on a panel and make the same attribute changes to all the selected buttons, at the same time.</p><p><b>To select multiple buttons at the same time:</b></p><p>Click in an empty area of the panel, then drag the mouse to <b>lasso</b> a region of buttons you want to select.</p><p><b>or</b></p><p>Press and hold the Shift key and drag the mouse over the buttons you want to select.</p><p><b>or</b></p><p>Press and hold the Ctrl key, and click each button you want to select.</p><p><b>To edit a property setting for the selected buttons:</b></p><p>In the Properties window, locate the property you want to change, and make the appropriate change in the right column of the property. The changes take effect immediately to all selected buttons.</p></div>	<div></div>
<div><h3>Screen Simulator with Navigation</h3><p>Perform a virtual test of a selected screen to verify the screen flow and functionality of the panels and buttons used to build the screen.</p><p>The Properties window is 'view only' and lists the current properties for a selected screen element, such as a panel or button. If you click on a button, the Properties window displays the button function property only.</p><p>The Navigation window enables you to view the screen flow of panels linked together by 'chain' buttons. You can verify that buttons 'chain' or link to the proper panels.</p><p>You access Screen Simulator from the Panel menu in Panel Editor.</p></div>	<div></div>



<div><b>Script Function Re-Sort</b></div> <div>Change the order in which a button function operates on the POS terminal, when you create or modify an applicable script button. The Re-sort feature enables you to change the order in which the functions appear in the Script Actions list. Click the applicable button, to move a function up or down in the list.</div>	<div></div>
<div><b>Button Tags</b></div> <div>Assign select buttons to a specific tag group. When you assign a button to a tag group, you can easily activate and deactivate buttons using the Activate Panel Button event in the Event Schedule function. Set up an Activate Panel Button event to activate a specific Tag, and all buttons assigned to that tag group are activated, no matter on what panel they reside.</div>	<div></div>
<div><b>Skin Selection</b></div> <div>Apply pre-defined color groups to panels, buttons, and backgrounds, automatically. The Skin feature enables you to assign a color scheme to multiple panels and buttons, at one time. This saves you time when you have to build many panels and buttons for an order entry screen.</div>	<div></div>



## How to use Screen Designer

The Aloha POS system is made up of a collection of panels and panel elements that form the order entry screen you use to handle sales transactions and other operational functions from your Front-of-House (FOH) terminal.

### Including images and other multi-media files

Multi-media files include the images and videos that ultimately appear on the Aloha POS system to enhance the order entry process, or provide training for your employees. For example, in Maintenance > Menu > Items > Item tab, the 'Button image' option enables you to assign a graphic image to an item record, which represents the item on the POS screen. Recipe videos enable you to train staff on how to prepare certain menu items, and images are used frequently in Screen Designer, when you need images to appear on panels and buttons.

You can create your own custom files, such as a company logo or recipe video; however, to make media files available for use in the system, you must first add the image(s) in Maintenance > System Settings > Media Files.

If you are CFC user and you add an image to the system, the image record follows the same ownership rules as any other record; therefore, if you want the image available at multiple stores, you need to assign a global- or corporate-level owner to the record. But, if you want the image available at a single store, assign the store as the owner of the record. An individual store can also upload a media file, but it will be available at that store only. And if the store wants to assign a different media file to a corporate-owned record, a version of that record must exist, for the store to modify.

#### Note

When you import data into Table Service, direct the system to the Bmp and Recipe folders in the \Aloha directory, which holds the images and other media files used with the Aloha POS system. The system imports **only** the media files referenced by records in the current data set. If after an import, you determine you want to use other files that were in the BMP or Recipe folders, you must first upload those files using the Media Files function.



The system supports the following multi-media file types:

Option	Supported Media File Type	Used to...
<b>Button Image</b>	Bitmap - <b>.bmp</b> JPEG - <b>.jpg</b> Portable Network Graphic - <b>.png</b>	Assign an image to an item button.
<b>Recipe Image</b>	Bitmap - <b>.bmp</b> Portable Network Graphic - <b>.png</b>	Assign an image to a recipe, in addition to the recipe text.
<b>Recipe Movie or Clock-In Movie</b>	Audio/Video Interleave - <b>.avi</b> Advanced Streaming Format - <b>.asf</b> Small Web Format, or Shock wave Flash Format - <b>.swf</b> Windows Media Video - <b>.wmv</b>	Assign an audiovisual file to a recipe, in addition to the recipe text. Assign a movie for an employee to view at clock-in.
<b>Tender Image</b>	Bitmap - <b>.bmp</b> Portable Network Graphic - <b>.png</b>	Assign an image to a tender type button.
<b>Script files</b>	Visual Basic Script - <b>.vbs</b> Java Script - <b>.js</b> Perl Language - <b>.pl</b> XML Script - <b>.xst</b>	Assign a customized script to a button.

## Panels

A panel is a section of a screen on which you add the panel elements (i.e., buttons and images) you want to appear on the POS terminal. You create panels in Panel Editor and you generally use more than one panel to build a typical Quick Service order entry screen.



For example, you might create a panel to display your sandwich menu items, another panel to display your drink items, and yet another panel to display your payment options.



Figure 1 Quick Service Order Entry Screen Made of Multiple Panels



Not all panels appear on your order entry screen at the same time. You can build several layers of panels that overlap one another, and then add buttons on each panel that link to other panels within the order entry system. This way, you view only the panels you need, at the appropriate time.

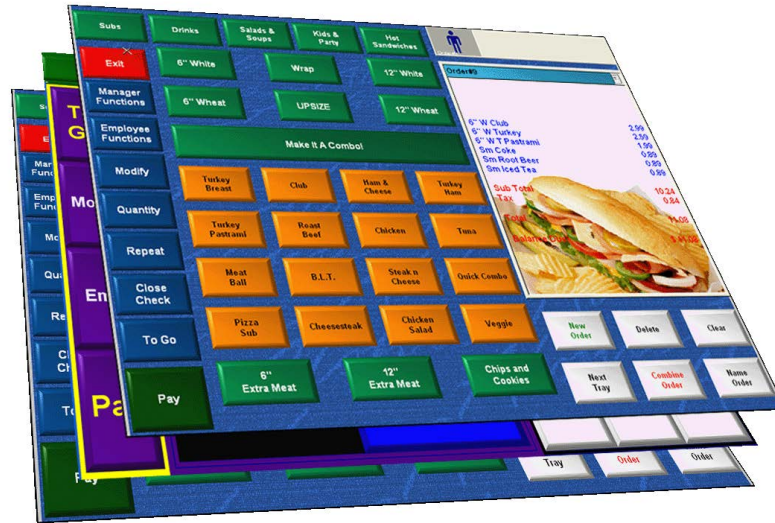


Figure 2 Example of an Order Entry System with Multiple Layers of Panels

When you create panels for Quick Service, you can define the size, color and position of each panel. You can even add a title border to a panel, or create panels without title borders, for a more seamless look.

We recommend you determine, ahead of time, the panels you need to create your order entry system, then create and customize each panel accordingly, to meet the exact needs of your business.

## Panel elements

Panel elements are objects you place on a panel to perform specific functions in the Aloha POS system. There are two types of panel elements: buttons and images.

A **Button** is a type of panel element used to define the menu items and functions that appear on the Aloha POS system. You place buttons on panels and you can define the size, shape, color, text, and position of a button, as well as the function, or behavior, of the button. For example, you might add a 'Burger' menu item button to a panel so an employee can order a 'Burger' from the Aloha POS terminal.

You use **Bitmaps/Images** to enhance the look and functionality of buttons and panels. Images can replace text on a button or enhance the background design of a button or panel. For example, you



can add a company logo to a panel, or you can use a product logo bitmap to replace the button text for a well known beverage item button, such as Pepsi.



Figure 3 Example of Buttons with Bitmaps on a Panel

## Determining the POS screens you need

Screens are collections of panels you combine to form the various order entry and function screens available in the Aloha Table Service POS system. Before you start to build the panels in Screen Designer, first take time to analyze the type of screens your establishment requires.

### Understanding default screens

The screen an employee sees first when they access the Aloha Table Service POS system is called the 'default' screen. You build the default screen in Screen Editor and you can create a different default screen for each job code that accesses the POS terminal. You might want all employees to view the same screen initially, or need different types of employees to view a different default screen, depending on their job role and level of authority and responsibility.



#### Tip

You can assign only one screen to a job code at a time.

For example, managers at some restaurants might not enter customer orders; instead, they might frequently use the POS terminal to access sales data and perform other manager functions, such as assigning drawers to cashiers. In this situation, you can create a default screen for your manager job code that displays a Reports panel and a Manager Functions panel only. Every time a manager accesses the POS terminal, they will see the floor plan of the restaurant, and buttons that access by default. They can still access other panels in the order entry system, as necessary, through buttons on the Reports or Manager Functions panel that link to other panels in the Quick Service POS system.



#### Tip

After you create a default screen, you must assign the screen to a specific job code or terminal, before an employee can view the default screen on the POS terminal.



Although you have the ability to create any default screens you need for your restaurant, the following table provides a list of default screens that establishments commonly use:

Default Screen	Purpose
<b>Cashier</b>	Shows order entry, check functions, and employee-related functions (ex: menu items, clock in/out, checkout, etc.)
<b>Manager</b>	Shows order entry and manager-related functions. (ex: menu items, assign drawers, PMix report, etc.)
<b>Delivery</b>	Shows order entry, employee, and delivery-related functions. (ex: <i>menu items, assign driver, customer information, etc.</i> ) Used only if establishment utilizes the Aloha Delivery/Frequent Buyer add-on.
<b>Kitchen</b>	Shows clock in/out functions. Intended for employees that need to access the POS terminal for labor-related purposes only.

## Understanding secondary panels

In addition to the panels on the default screens, you more than likely access additional panels when performing a transaction on the POS terminal.

As discussed earlier, you can create layers of panels when you build your order entry system, so that single panels are interchangeable on a screen, meaning that you can use chain buttons that enable you to navigate to other panels in the order entry system. Chain buttons enable you to navigate to a single panel or an entirely new group of panels, which in many cases, gives the appearance of a new screen.

For example, lets say you build a Drinks panel, and then build a Food panel with the exact size and placement as the Drinks panel. When you do this, the Food panel overlaps the Drinks panel. To navigate between the Drinks and Food panel, you add a 'Drinks' button that chains to the Drinks panel and a 'Food' button that chains to the Food panel.

Later, when you build your default screen in Screen Editor, you might decide to select the Food panel for your default screen. When an employee using that default screen touches the Drinks button, the Drinks panel appears on the order entry screen, temporarily replacing the Food panel. The employee can touch the Food button to redisplay the Food panel, or touch a different chain button that takes



them to a totally different panel. It all depends on the different panels and chain buttons you add as you create the order entry system.



**Tip**

Although it is common to chain or link to a single panel, you can chain to multiple panels, so that when an employee presses a specific button, all panels on the current order entry screen are replaced with new panels, giving the appearance of a new screen.

## Deciding the look, feel, and flow of a screen

After you determine the types of panels you require for a screen, decide how you want to organize the look and layout of the panels. The best way to do this is to begin with the default screen. The default screen is the screen that first appears for an employee, when they access the POS terminal.

Start with the default screen and decide the look, feel, and flow of the panels on your screen. If you have a good idea of the colors you want to use for the panels and buttons on your screen, as well as how you want the ordering process to flow on your screen, you are better prepared to build a user-friendly order entry system that enhance the sales transaction process for your establishment.

The following questions can help you plan how you want the panels on your screen to look and function:

- Do you have a known color scheme you want to use for the panels on your screen? (For example, checkerboard or primary colors.)
- Do you want all the panels on a screen to have the same color?
- Do you want the panels on the screen to have titles and borders? (**Tip:** When all panels are the same color and do not contain panel titles or borders, the buttons on the screen look as though they are floating.)
- Is it mandatory for all menu items to be accessible from one panel?
- Do you want to divide your menu into groups? (For example, sandwiches, sides, and drinks.) (**Tip:** Answering this question helps determine the different panels to create.)
- Do you have multiple order modes, such as Here, To Go, and Drive-Thru? (**Tip:** If you use multiple order modes, place the appropriate order mode buttons on one of your default screen panels, to quickly assign orders to the appropriate mode.)
- Do your managers also enter orders? (**Tip:** If your managers do not enter orders, you may not want to display menu panels on the default screen for the managers.)



## Exploring screen panel examples

You can create a variety of panels for your order entry system. Although it is your decision to determine which panels are the most logical fit for your establishment, an ideal order entry system contains any of the following recommended panels.



### Note

The panels discussed in this section use the 'Standard Panel' option in Panel Editor. Remember, you can apply different color schemes or images to panels to enhance the appearance of the order entry system.

## Menu panel

A menu panel contains the menu items available for order when you complete a sales transaction. It is common to have multiple menu panels, and you can group each panel by a category from your menu. For example, if your menu is organized into categories, such as Burgers, Salads, Beverages, Sides, and Desserts, we recommend you create a menu panel for each menu category, to make the ordering process easier.

Although you might have multiple menu panels, place your most frequently used menu panel on the default screen, then use 'chain' buttons to access the other menu panels.

If you want multiple types of menu items on the initial default screen, we recommend you place your most commonly ordered items on one menu panel and use secondary menu panels for the less popular items. The menu panel is usually created as a square or rectangular shape.



Figure 4 Menu Panel Example



## Submenu panel

A submenu panel provides access to different menu groupings, such as beverages, sandwiches, grill station, and more. Submenu panels use chain buttons, which enable you to link directly, or indirectly, to other panels in the order entry system. We highly recommend this type of panel for large databases that require many panels. A submenu panel, which is usually created as a vertical or horizontal bar, should be part of the default screen.



Figure 5 Submenu Panel Example

## Modifier panel

A modifier panel contains items ordered as choices to accompany another menu item. For example, if you order a salad, the salad topping and dressing choices a customer typically orders along with the salad are included on a modifier panel, which is usually linked to the menu item button. You can attach a system-generated modifier panel to a menu item button, or you can create custom modifier panels, which you access, as necessary, from the order entry screen.



Figure 6 Modifier Panel Example

## Comps and promotions panel

A comps and promotions panel contains the buttons used to apply comps and promotions to a transaction. You create comps and promotions in Maintenance > Payments > Comps and Maintenance > Payments > Promotions, respectively.

Comps and promotions are sometimes combined with a tenders panel, but depending on the number of comps and promotions available, they might warrant their own panel. A comps and promotions panel is created as a secondary panel in various shapes, and is usually located off of, or



close to, a tenders panel. Most comps and promotions require additional tendering before closing the check.

BOGO Taco	\$.99 Coupon	Free Dessert
Emp Meal	100% Comp	50% Comp

Figure 7 Comps and Promotions Panel Example

### Quantity panel

A quantity panel provides the ability to order multiples of an item with the press of a single button. It should contain numbers 0-9. You assign the 'Quantity' button function to buttons on this type of panel. Additionally, when you select the 'Append' property, the button enables you to enter quantities larger than a single digit. For example, to order 12 burgers, touch 1 and 2. A quantity panel, which is usually created as a vertical or horizontal bar, should be part of the default screen.



Figure 8 Quantity Panel Example

### Check functions panel

A check functions panel contains a group of button functions, such as repeat, delete, exit, and more, that perform an action on the current check. The buttons on this panel vary. Each job code may have a different check functions panel. For example, a drive-thru cashier could use the full range of recall functions, or managers could have printer and remote display system rerouting or reporting functions at their fingertips. However, this is not the usual setup. Without this type of panel, it is difficult to alter current orders and perform certain tasks, subsequently slowing down service. A check functions panel, which is usually created as a vertical or horizontal bar placed close to the guest check window, should be part of the default screen.



Figure 9 Check Functions Panel Example

### Tenders panel

A tenders panel contains the buttons used to apply a payment to a transaction. Payment or tender types are created in Maintenance > Payments > Tenders.

You touch at least one tender button during each sales transaction; therefore, the panel location, button sizes, and accessibility of a tenders panel are extremely important. A Table Service



environment calls for fast and easy tendering of checks with one screen touch. Most buttons on a tenders panel use a Script button function to close checks and return to a new guest check in preparation for the next order. A tenders panel is created in various shapes, and depending on the allotted space and the environment, this type of panel could be on a default screen or used as a secondary panel.



Figure 10 Tenders Panel Example

### Employee and manager functions panels

An employee or manager functions panel contains various functions available to the employee, such as Checkout, Break In, Change Password, and more. These panels can consist of button functions that affect current checks, but are usually not related to ringing sales. An employee functions or manager functions panel is normally created to match the size dimension of a menu panel.

We recommend you create separate panels for employee functions and manager functions, based on the required security. Depending on the access levels, a manager functions panel could have up to



three times as many functions as an employee functions panel, sometimes having to navigate through secondary panels to access other functions, such as reports or reroutes.





	<b>MGR FUNCTIONS</b>				
Check out	Delete Checkout	Calibrate	Name Order	Recall All	
Clock Out	Delete Clockout	Close Check	Open Drawer	Recall Previous	
Change Password	Clear Password	Edit Time	Print Checkout	Recall Next	
Assign Drawer	Manage Drawers	End Of Day	Refund	Recall Next Open	
Allow Clock In	Clock In/Out	Item Lookup	Close Refund	Reopen Check	
	<b>to MGR REPORTS and ROUTINGS</b>				

Figure 11 Employee and Manager Functions Panel Example

## Building a Quick Service screen

This section discusses the general process you follow when creating panels and default screens in Screen Designer. We recommend you read this section before you begin to build the panels and default screens for the Aloha POS system. This section is organized as follows:

- Create Panels
- Add Buttons and Images to Panels
- Create Default Screens
- Test Screen and Button Functionality
- Assign Default Screens to Job Codes

### 1. Creating panels

The first part of the screen building process is to access Panel Editor under Maintenance > Screen Designer > Table Service Screen Designer > Work with Panels, and then create the panels you require for your POS system.

Think about the panels you need for your default screens and add those panels first. A default screen is the screen that first appears when an employee accesses a POS terminal, and is determined by the job code to which the employee is assigned. You can create more than one default screen, as you might require different employees to have different panels on their default screen. You create those



different panels for the default screens, as well as the other panels you need to access in the POS system.



#### Note

You do not create default screens in Panel Editor; instead, you use Panel Editor to create the panels you need for the default screens, as well as the rest of the order entry system. You assemble default screens in Screen Editor, from the panels you create in Panel Editor.

When you access Panel Editor to create panels, a black workspace area appears. This is where you lay out the panels for the order entry system. A Properties window also appears. As you add a panel to the workspace, use the Properties window to customize the attributes of the panel, such as the number, name, color, title, and more.

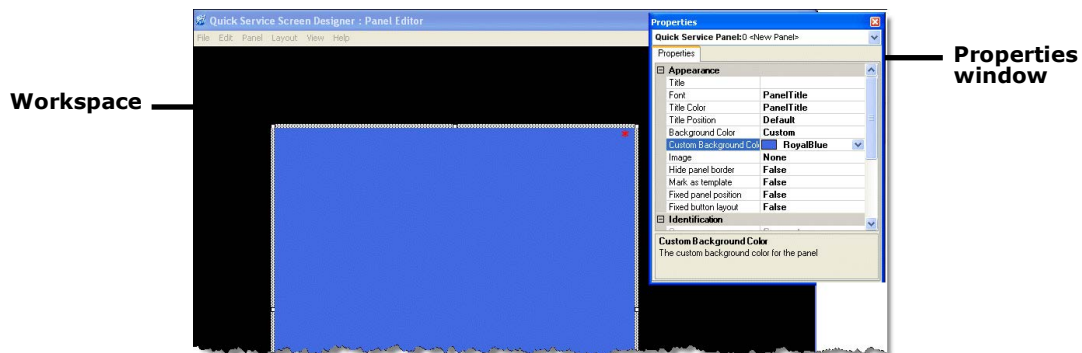


Figure 12 Properties Window with Attributes for Selected Panel

It is important to arrange your panels in a logical flow that is easy for cashiers and other users of the system to follow. For example, most cashiers are taught to take customer orders and apply payments



in certain steps; therefore, laying out panels in a manner that reflects those steps will make the POS transaction process easier for both your employees and customers.

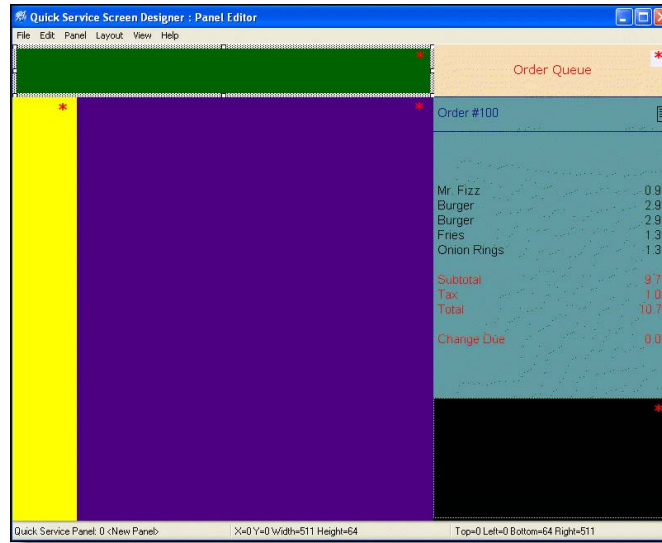


Figure 13 Example of Panels Laid Out in Panel Editor

Some panels you might create for a default screen include the:

• order panel (guest check)	• menu panel
• order queue panel	• submenu panel
• check functions panel	• order entry functions panel
• quantity panel	• clock in/clock out panel

Some panels you might create for the rest of the order entry system include the:

• tenders panel	• sides panel
• beverages panel	• comps and promotions panel
• manager functions panel	• employee functions panel
• desserts panel	• kids meals panel
• combos panel	• salads and soups panel

The panels you create for your default screens appear side by side on the screen; therefore, those panels cannot overlap; however, the other panels you create for the order entry system, that you want to be able to access from the default screen, can and should, overlap.



If you want a panel to overlap another panel, create a copy of the existing panel to ensure both the new and existing panel have the exact same size and layout dimensions on the screen.

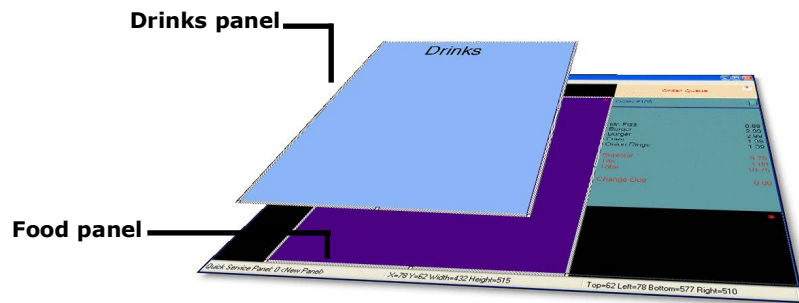


Figure 14 Example of Overlapping Panels with Same Size and Layout Dimensions



### Reference

See "[Accessing Additional Panels](#)" for more information on overlapping panels.

## 2. Adding buttons and images to panels

After you create and arrange panels appropriately on your workspace in Panel Editor, add panel elements to each of the panels. Panel elements are the buttons and images needed to order items or perform other functions while on the Table Service POS terminal.



You can add buttons to a panel one at a time or as a group. If you are adding buttons to a blank panel, we recommend you add a group of buttons at one time, then customize each button, as necessary.



Figure 15 Example of Panels with Buttons Assigned

The best way to add a group of buttons to a panel is to use the Button Grid feature. The Button Grid groups buttons together in a rectangular grid and sizes and spaces each button equally. You can have as many buttons in the grid as you like, up to the maximum number of buttons that can fit in the panel.

Use the 'New Button Grid' option to lay out a grid on your panel, then use the Properties window to specify the number of buttons and the dimensions of each button, including spacing and border options. When you have the number of buttons laid out the way you want on the panel, use the 'Fill Grid with Buttons' option to make buttons appear on the panel, within the area indicated by the grid.

After you add buttons to a panel, you need to assign a function to each button to define how the button operates when you select it on the POS terminal. Every button must have an action assigned and each new button you create has a default action of 'None.'

Function	
Action	Order Item
Item	Philly ChzSteak

Figure 16 Example Button Function (Order Item)

Two popular button functions that help make the ordering process more efficient are the 'Chain' and 'Script' functions.



The chain button function enables you to navigate quickly to a panel or group of panels. When you create a chain button, you link the button to a specific panel. For example, you might want to create a chain button that navigates you to a new panel containing employee function buttons. You can also create a chain button that navigates you to an entirely different group of panels; thereby, taking you to a new screen.

The script button function enables you to combine multiple functions into one button and be creative in how you perform certain functions on the POS terminal. When you create a script button, first determine the order in which you want functions to operate, then add each function to the script dialog box, in that order. When you touch a script button on the POS terminal, the functions execute in order. For example, a payment, or tender, button is commonly created as a script button because when you apply payment to an order, you usually want several functions to happen. For example, you can set up a script to apply tender payment to a check, close the check, and then return you to a specific panel or group of panels, to start a new order. In this situation, you add the Tender, Close Check, and Chain button functions to the script button, in that order.

### 3. Assembling default screens

After you finish adding panels and buttons for the order entry system, the next step in the screen building process is to access Screen Editor under Maintenance > Screen Designer > Table Service Screen Designer > Work with Screens, and build your default screens from the existing panels.

A default screen is the screen that first appears when an employee accesses a POS terminal, and is determined by the job code to which the employee is assigned. A default screen consists of only those panels you want an employee to see initially, when they first access the terminal. Default screens enable an employee to have access to panels in the order entry system. If a default screen is not available when an employee accesses a POS terminal, then no panels are available; therefore, you must create at least one default screen.

If you want different panels to appear on the default screen for certain job codes, you need to create more than one default screen. For example, cashiers may need different panels on their default



screen than managers. You can create a different default screen for each job code, but each job code can have only one default screen assigned at a time.



Figure 17 Screen Editor Preview Tab

#### 4. Testing screen and button functionality

After you assign panels to a screen, you use Screen Simulator to quickly view properties for each button on the screen and verify that chain buttons link properly between panels. You access Screen Simulator from the Panel menu in Panel Editor.

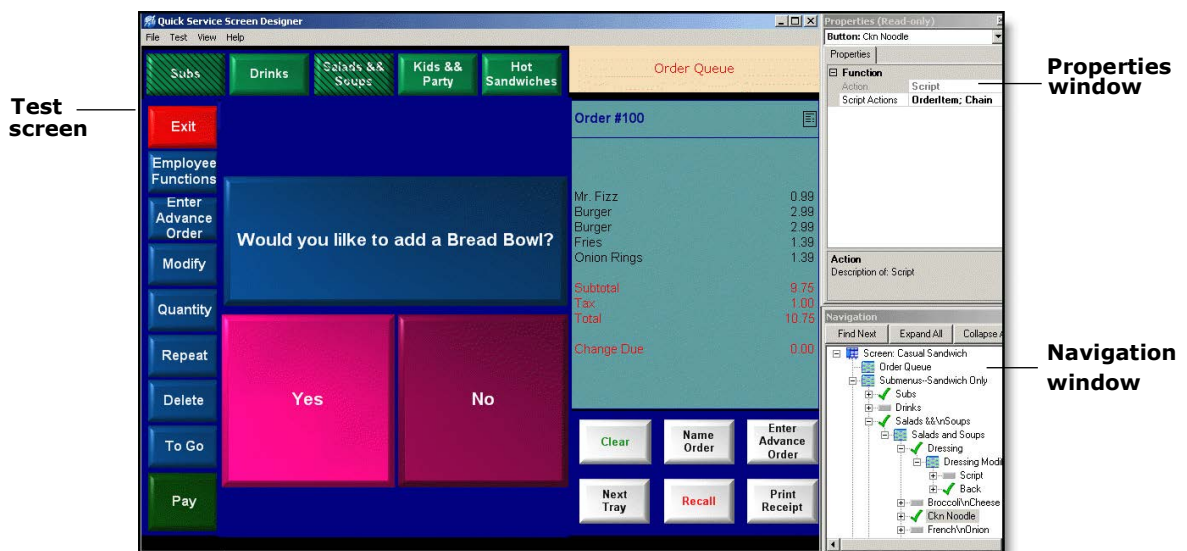


Figure 18 Screen Simulator Test Screen



Although you cannot make edits while in Screen Simulator mode, you can view the function properties for a button to verify the correct button action is assigned. You can also view the screen flow of panels linked together by 'chain' buttons, which allows you to verify that buttons 'chain' or link to the proper panels. When you double-click a button in the Navigation window, the navigation tree expands to where the button is in the screen flow and highlights the selected button.

## 5. Assigning default screens to job codes

After you create a default screen, you must assign the default screen to a job code before an employee with that job code can view the screen on a POS terminal. You assign job codes in the Labor function under Maintenance > Labor > Jobcodes > Order Entry tab.

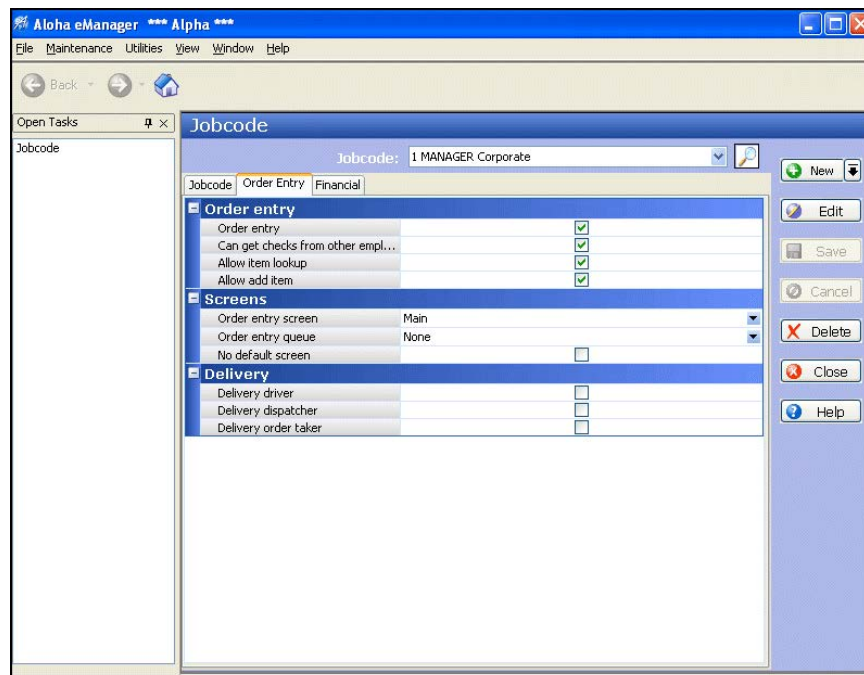


Figure 19 Jobcode Function Screen

If you are a CFC users and you create screens for a multi-store environment, after you assign your default screens to the appropriate job codes, the panels and default screens built in Screen Designer are ready for distribution to stores. When a store receives the new panels and default screens, the store can perform a system refresh to activate the screens on the POS terminals.



### Reference

Refer to [Event Schedule](#) for more information.





**Tip**

After all settings are in place, you must select Utilities > Refresh Data to transfer the new settings to the POS terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. After the data refresh is complete, all new settings become operational on the FOH.



## Getting started

To get started, you must access Screen Designer and set the desktop resolution.

### Accessing the Screen Designer home screen

You access Screen Designer from the Maintenance menu.

Select **Maintenance > Screen Designer > Table Service Screen Designer**.

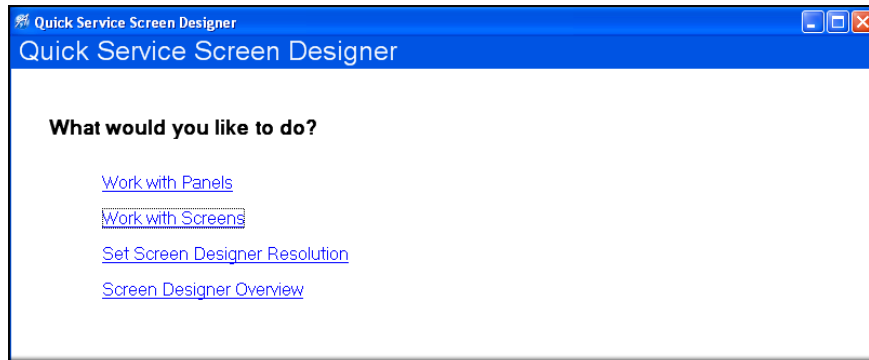


Figure 20 Screen Designer Home Screen

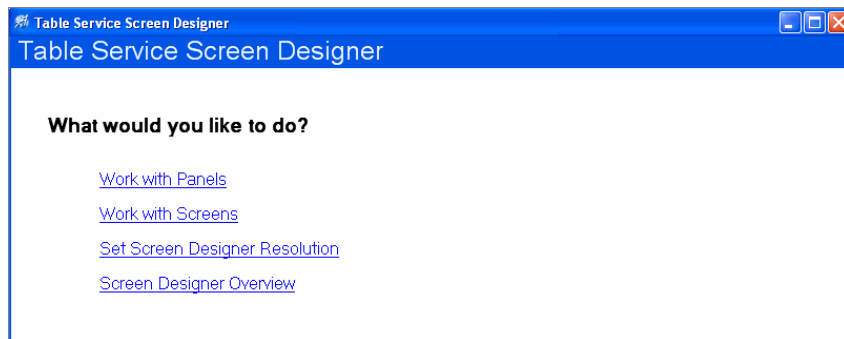


Figure 21 Screen Designer Home Screen

The home screen provides the following options:

- Work with Panels
- Work with Screens
- Set Screen Designer Resolution
- Screen Designer Overview



## Setting the desktop size for Screen Designer

The Set Screen Designer Resolution option on the Screen Designer home screen allows you to set a specific monitor screen resolution before you access Panel Editor.

We recommend you design in Panel Editor using the screen resolution that matches the POS terminals. This way, your panels and buttons display in design mode the way they will appear on the Aloha POS order entry screen in the restaurant.

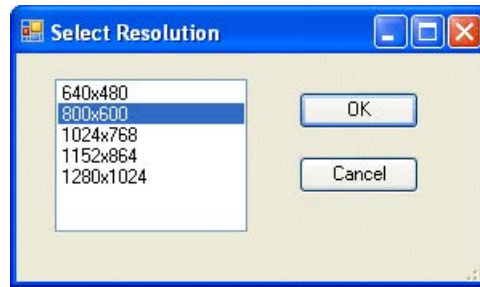


Figure 22 Screen Resolution Dialog Box

When you initially set the screen resolution, the system retains the resolution properties each time you access Screen Designer until you change to a different resolution. When you exit, screen resolution resets to a default of 800x600. The list of available screen resolutions are based on the specific computer used to access Table Service.



## Introducing Panel Editor

The Panel Editor environment contains specific tools that help you build and customize panels.

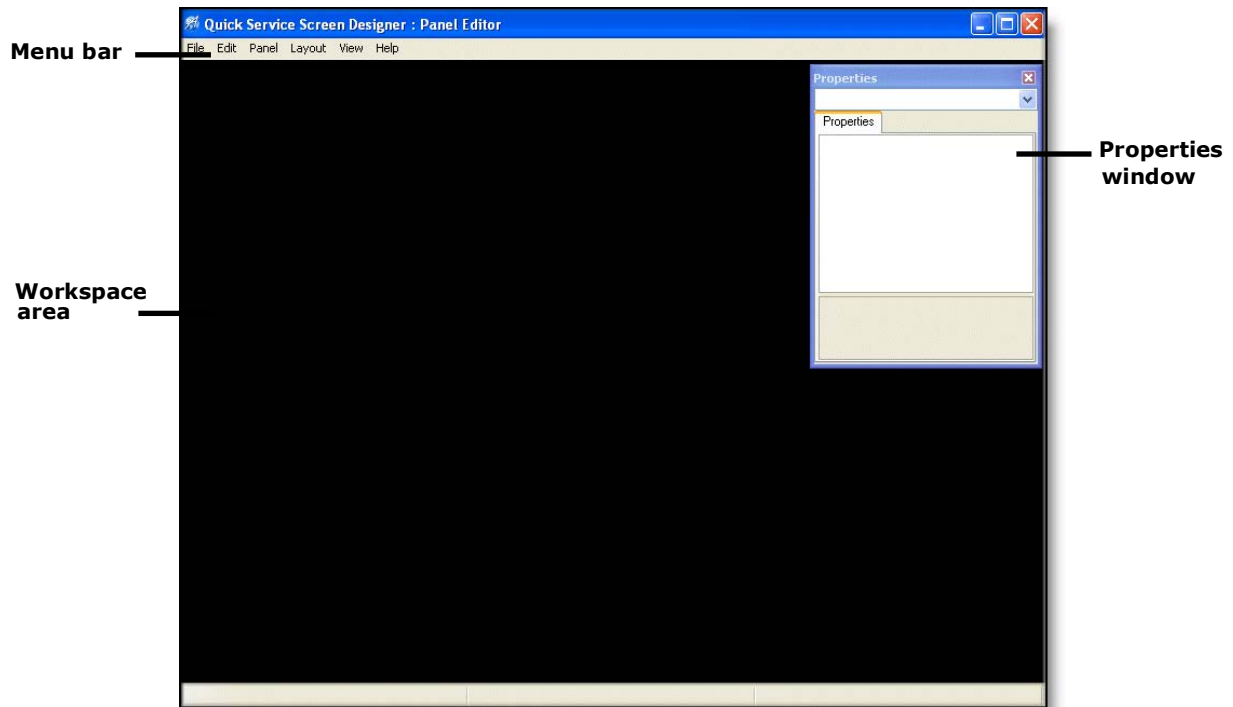


Figure 23 Panel Editor Screen

### Menu bar

The menu bar contains the following menus you need as you build panels in Panel Editor:



Figure 24 Panel Editor Menu Bar

**File** — Enables you to exit Panel Editor and return to the Screen Designer Home screen, exit the application, or switch to Screen Editor.

**Edit** — Enables you to perform basic edit functions, such as Undo, Redo, Cut, Copy, Paste, and Select All.

**Panel** — Enables you to open, add, and manage panels and buttons.

**Layout** — Enables you to control the alignment, size, and spacing of buttons on a panel.

**View** — Enables you to show or hide the Properties window, select a color scheme (Skins) for panels and buttons, as well as set your current color selections as the default skin.



**Help** — Enables you to get online Help for Screen Designer and Panel Editor, as well as product version information.

Workspace area

The workspace, the black area of the Panel Editor screen, is the region where you draw your panels and panel elements to build the components of a screen. The size of the workspace is determined by the resolution of the desktop.

Panel Properties window

The Panel Properties window lists the current properties for a selected panel. This window appears automatically, so you can quickly view or make changes to a panel. For example, if you click in a panel, the Properties window displays the settings for the selected panel, including the title, font, color, ID number, location, size, and much more. To close the Properties window, click **Close (X)**.

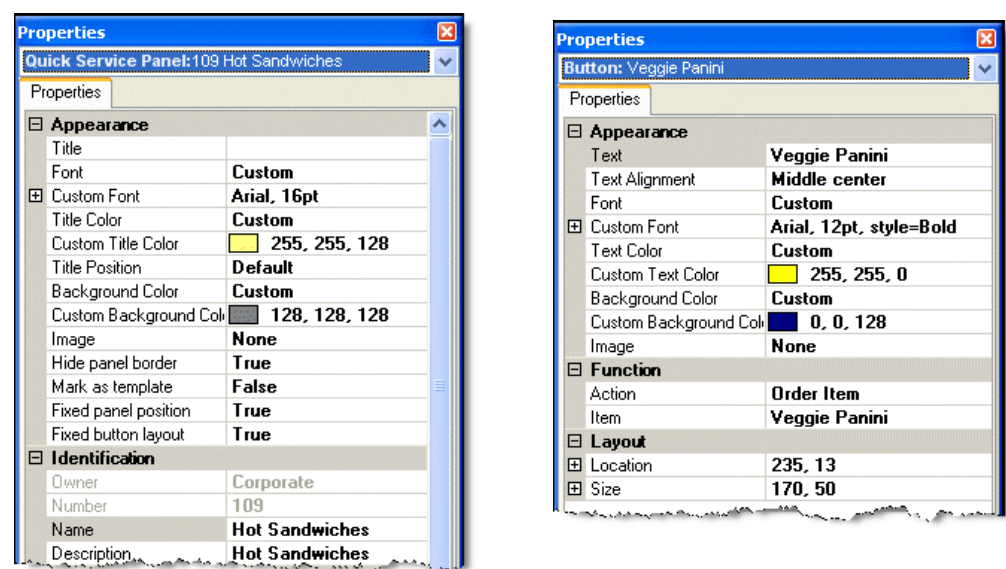


Figure 25 Example Properties Window for a Panel



### To navigate the Properties window:

1. Select the **panel** whose properties you want to display. The properties are sorted by group. For example, the 'Appearance' group bar includes the Font, Background Color, and Image properties, to name a few.
2. Collapse the **group bar list** so that you can see the group names only, or expand a **group bar**, to view the properties within that group. When you expand or collapse the list, you see a plus (+) icon or minus (-) icon to the left of the group name.
3. Use the **scroll bar** on the right side of the Properties window to navigate up and down the various panel properties.



#### Tip

To move the Properties window around in your workspace area, click the title bar, hold the left mouse, and drag the window to the location you prefer. To resize, move your mouse to the edge of the window until you see double-sided arrows, then hold the left mouse and drag the window border to the size you prefer.

### To change the value of a property:

1. Select the **property** in the left column.
2. Change the **value** of the property in the right column.



#### Tip

If a property has a predefined set of values, a down arrow appears in the right column of the property. Click in the right column of the property, then select a value from the drop-down list. If a property has an additional dialog box to complete, an ellipses button (...) appears. Click the ellipses button (...) to display the dialog box.

## Undoing and redoing changes in Panel Editor

If you make a mistake or change your mind, Panel Editor provides an undo option for the previous actions you performed. You can undo most actions, up to the last save. And if you change your mind about undoing an action, you can use Redo. After you save changes, the Undo/Redo options reset.

### To undo a command:

Select **Edit > Undo** from the Panel Editor menu bar.

-or-

Press **Ctrl+Z** on the keyboard.

### To redo a command:

Select **Edit > Redo** from the Panel Editor menu bar.



-or-

Press **Ctrl+Y** on the keyboard.

## Opening and closing Panel Editor

You access Panel Editor through the Screen Designer home screen. After you save your panels, you can close Panel Editor at any time and return to the main screen.

### To open Panel Editor:

1. Select **Maintenance > Screen Designer > Screen Designer** from the menu bar. The Screen Designer home screen appears.
2. Click **Work with Panels**. The Panel Editor screen appears with the Properties window displayed.

### To close Panel Editor:

1. Select **File > Close Panel Editor** from the Panel Editor menu bar.

-or-

Click **Close (X)**.

-or-

Press **Ctrl+F4**.

2. If a confirmation message appears for you to save panels, select the desired option. The system returns to the main screen.



### Tip

You can also switch to Panel Editor while in Screen Editor. Select **File > Panel Editor** from the Screen Editor menu bar.



### Caution

Always save your panels before you close Panel Editor. An asterisk \* on a panel indicates the panel is not saved. To save a panel, right-click the panel and select **Save Panel**, or select **Panel > Save All Panels** from the Panel Editor menu bar.



## Changing the default owner of a panel

If you manage multiple sites using CFC, the owner of a panel determines who can view and edit a panel, as well as the stores that receive the panel in their database.



### Reference

To learn more about ownership, see [Understanding owners in Screen Designer](#).

### To set the default owner of a panel:

1. Select **Defaults > Make default panel**. The New Panel Options dialog box appears.
2. Select the default **owner** you want to assign to any new panels you create from this point forward.
3. Click **OK**. The selected owner remains in effect for all new panels you create, until the next time you change the default owner.



### Caution

You cannot change the owner after you create a new panel; therefore, if you need to change the owner assigned to new panels you create, change the default owner before you begin creating new panels.



## Working with panels

The Panel Editor tool enables you to build the various panels or sections needed for your Aloha POS screens. Panel Editor includes easy-to-use features that assist you with the panel building process.

There are a few concepts and features to know about when you work with panels in Panel Editor.

### Understanding panel ownership

If you manage multiple sites using CFC, when you create panels in Panel Editor, you assign an owner to each panel. The owner determines who can view and make changes to the panels in the database, as well as which store locations receive the panels in their local database.

For example, if you want the 'Drinks' panel available at all store locations, no matter if they are corporate- or franchisee-owned stores, you assign an owner whose owner type is 'global.' If you want the panel at corporate-owned stores only, you assign an owner whose owner type is 'corporate.' And if you want the panel to appear at a specific store, you assign the specific store as owner of the panel.



#### Reference

If you manage multiple sites using CFC, refer to [Understanding owners in Screen Designer](#) for more information about how ownership works in Configuration Center.

### Understanding panel types

You design each panel for a specific function and purpose. Although you can create as many panels, as necessary, these types of panels are available for you to use in Panel Editor:

**Panel** — Displays a basic, generic panel. Use this panel type for panels you create that are categorized by functions, such as menu items, manager functions, order entry functions, and more. You can define as many of these panels, as necessary, for different sections of the screen. The generic panel is the most commonly used panel type.

**Order Panel** — Displays the current order (guest check) on the POS terminal. You can place the order panel anywhere on the screen; however, it is typical to place this panel on the left or right side of the screen. You can also resize the panel, as necessary, and assign different colors and images to the panel.

**Order Queue Panel** — Displays a visual appearance of all open orders, in sequence, on the POS terminal. You may not need an order queue panel if your checks close as soon as you place an order; however, if you have a drive-thru, you need an order queue panel.

**Review Order Panel** — Displays a mirror image of the current, or previous, recalled order(s) on the POS terminal.

**Dashboard Panel** — Displays a panel that allows you to view and identify key performance indicators (KPIs) and other vital statistics. Access a dashboard and view these key metrics quickly and easily, either by displaying a dashboard in place of the floating logo, or on demand by touching a button. In



Quick Service, a dashboard can appear in a static location on the screen. A dashboard compiles information from different types of reports into one interface, proving you with actionable information distilled into easy to read components for decisive action on the restaurant floor.



### Reference

Refer to the [Dashboard Feature Focus Guide - HKS323](#) for more information on configuring and using this feature.

## Establishing panel name and number conventions

We recommend you establish a naming convention for the panels, to avoid confusion when accessing panels. Abbreviate the panel name as much as possible and make it descriptive of the function it performs. When dealing with multiple concepts that use different panels, always enter a preceding indicator, or prefix, such as DT for Drive Thru, or MGR for Manager. This technique groups panels together when they appear on various screens.

We also recommend you utilize an effective numbering scheme that helps categorize your panels, as well as place them in a logical order.

## Understanding panel versioning

If you manage multiple sites using CFC, you generally start with a set of corporate-owned records that are applicable to the majority of your stores. These initial records are considered your 'primary' records. Versioning allows you to have variances in a primary record, without the need to create a separate, unique record for each store.

Most of the panels you create are probably used at all store locations; however, when some of your stores may need to offer different options on their order entry screens, you can use versioning to support those variations at each store.



Use the 'New Panel Version' option in Panel Editor to create a version of an existing panel.

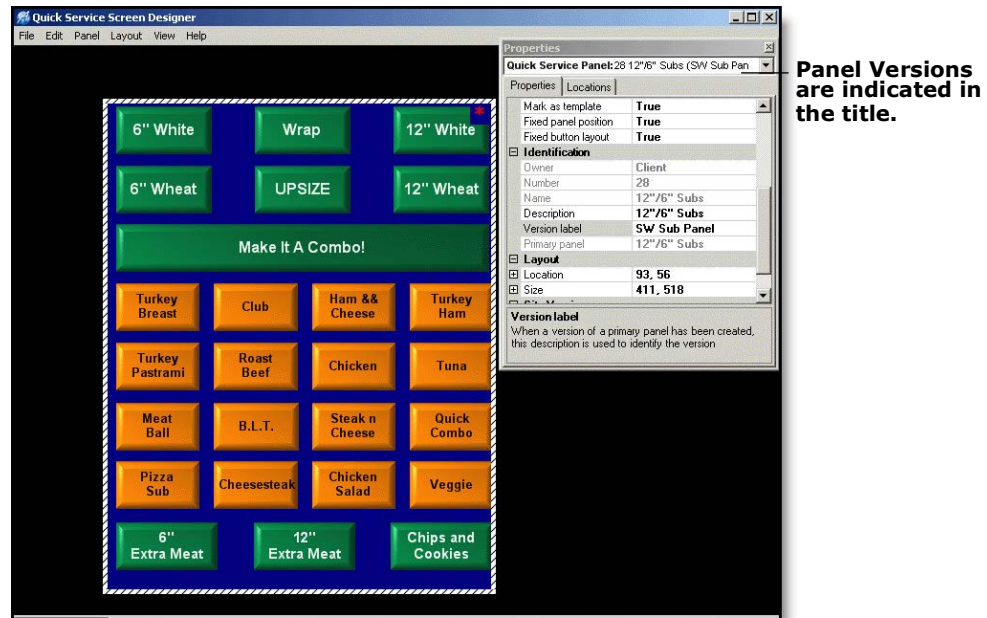


Figure 26 Panel Version

A version of a panel is a composite of the primary panel, except for the few changes made to the panel that a single store or group of stores may need. The version panel is not a standalone panel; it shares the identity of the primary panel. The panel version overrides its primary panel based on the start and end dates of the version panel (i.e., scheduled versioning). If there are multiple versions of a primary panel, the most restrictive version takes precedence. For example, a panel version for a single store overrides a panel version for a group of stores, as long as the activation dates for the panel version are valid.

## What you can do with panels

### Adding a panel

You must add a panel to the workspace before you can add buttons and images to the panel. You assign a name and number to each panel, and all panels have a Title property in the Properties window. It is optional to add a title to a panel. The title text appears at the top in a system-generated portion of the panel and you can modify the font and color of the title text, as well as the color and other attributes of a panel, through the Properties window.



## To add a panel:

1. Select **Panel** from the menu bar, then select one of the following menu options:

**New Panel** — Displays a basic, generic panel. Use this panel type for panels you create that are categorized by functions, such as menu items, manager functions, order entry functions, and more. You can define as many of these panels as necessary, for different sections of the screen. The generic panel is the most commonly used panel type.

**New Order Panel** — Displays the current order (guest check) on the POS terminal. You can place the order panel anywhere on the screen; however, it is typical to place this panel on the left or right side of the screen. You can also resize the panel, as necessary, and assign different colors and images to the panel.

**New Review Order Panel** — Displays a mirror image of the current, or previous, recalled order(s) on the POS terminal.

**New Order Queue Panel** — Displays a visual appearance of all open orders, in sequence, on the POS terminal. You may not need an order queue panel if your checks close as soon as you place an order; however, if you have a drive-thru, you need an order queue panel.

**New Dashboard Panel** — Displays a panel that allows you to view and identify key performance indicators (KPIs) and other vital statistics. Access a dashboard and view these key metrics quickly and easily, either by displaying a dashboard in place of the floating logo, or on demand by touching a button. In Quick Service, a dashboard can appear in a static location on the screen. A dashboard compiles information from different types of reports into one interface, proving you with actionable information distilled into easy to read components for decisive action on the restaurant floor.

The selected panel appears on the workspace and default properties for the panel appear in the Properties window.

2. Move the **panel** to the desired location on the workspace area, and resize, as necessary.



### Note

You cannot modify the position of the Order Entry Submenu panels.

3. Locate the **Identification** group bar on the Properties window.
4. Click the **left column** of the 'Number' property and assign a **panel number** in the right column.

**-or-**

If you want the system to assign a number to the panel:



- a. Click the **ellipses button (...)**. The Number Assignment dialog box appears.

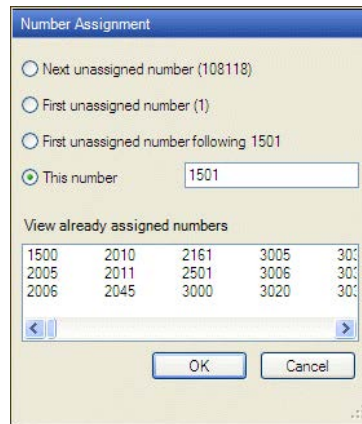


Figure 27 Number Assignment Dialog Box

- b. Select one of the following **options** and click **OK**.

**Next unassigned number** — Begins with the largest number currently in use and adds one (1), to determine the next available number.

**First unassigned number** — Begins with the lowest number (1), and displays the next, unassigned number.

**First unassigned number following** — Begins with the previous number, and displays the next, unassigned number.

**This number** — Enables you to type any valid, unassigned number of your choice. This option defaults to the same number as the 'First unassigned number following' option. If you type a number that is already in use, or reserved for a different item type, an error message appears.

**View already assigned numbers** — Enables you to view a list of numbers already in use. Use the **left** and **right arrows** to scroll through the list.

5. Type a **name** for the panel. The name identifies the purpose of the panel, such as Main Floor, Section 2, Sandwiches, Manager Functions, and Tenders, to name a few.
6. Type a general **description** for the panel.
7. Complete the additional **options** for the panel, as necessary.



8. Select **True** from the 'Context Panel' drop-down list, if you are creating a context panel.



#### Reference

Refer to the [Context Panels Feature Focus Guide - HKS346](#) for more information on configuring and using this feature.



#### Reference

There are additional properties you can modify for a panel. Refer to the following procedures for more information:

Setting panel properties

[Adding a title to a panel](#)

[Adding an image to a panel](#)

[Changing the color of a panel](#)

9. Select **Panel > Save Panel** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **Save Panel**.



#### Caution

An asterisk \* on a panel indicates the panel is not saved. To save a panel, right-click the panel and select Save Panel, or select Panel > Save All Panels from the Panel Editor menu bar.

## Opening a panel

You can quickly locate and open an existing panel from the Panel Editor menu bar.

### To open a single panel:

1. Select **Panel > Open Panel** from the Panel Editor menu bar. The Open Panel dialog box appears.
2. Select the desired **panel** and click **OK**.

**-or-**

Double-click the desired **panel**.

The selected panel appears on the Panel Editor workspace.

### To open all panels for a specific screen:

1. Select **Panel > Show All Panels for Screen** from the Panel Editor menu bar. The Select Screen dialog box appears.
2. Select the desired **screen** and click **OK**.



-or-

Double-click the desired **screen**.

All panels assigned to the selected screen appear on the Panel Editor workspace.

## Setting panel properties

You can define the parameters of a panel using the Properties window. This procedure provides the general steps for setting panel properties.

### To set the properties for a panel:

1. Select or open the **panel** for which you want to set properties.
2. In the Properties window, locate the **property** you want to change.
3. Click in the **left column** of the property and in the right column, change the **text** or select a **value** from the drop-down list.



#### Tip

If a property has an additional dialog box for you to complete, an ellipses button (...) appears in the right column of the property. Click the ellipses button (...) to display the dialog box.

4. Repeat steps **2** and **3** until you finish making changes to the applicable properties, as necessary. The changes apply to the panel immediately.
5. Select **Panel > Save Panel** from the Panel Editor menu bar.

-or-

Right-click the **panel** and select **Save Panel**.

## Adding a title to a panel

You can add a title to a panel and the title appears on the POS terminal. If the title is left blank, the panel appears without a title border.

### To add a title to a panel:

1. Select or open the **panel** for which you want to add a title.
2. Locate the **Appearance** group bar in the Properties window.
3. Click the **left column** of the 'Title' property and in the right column, type a **title** for the panel. The title appears at the top of the panel.
4. Select the desired **font**.

-or-

If you want a custom font:

- a. Select **Custom** from the 'Font' drop-down list. The Custom font property appears under the Font property.



- b. Click in the **Custom font property**, then click the **ellipses button (...)**. The Font dialog box appears.

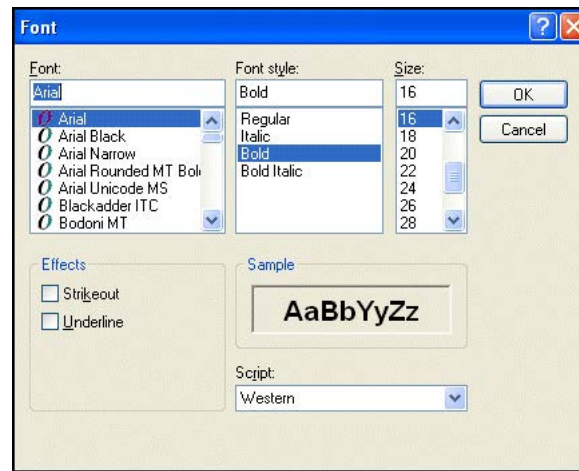


Figure 28 Font Dialog Box

- c. Select a **font**, **font style**, and **size**, then click **OK**.
5. Select the desired **color**.
- or-**
- If you want a custom color:
- a. Select **Custom** from the 'Title Color' drop-down list. The Custom Title Color property appears under the Title Color property.
  - b. Click in the **Custom Title Color** property, then click the **down arrow**. A list of available custom colors appears.
  - c. Select a **color** from the 'Custom,' 'Web,' or 'System' tab.
  - d. Select the desired **title position**.



**Tip**

Another technique to add a title to a panel is to leave the 'Panel Title' property blank, add a new button on the panel, and assign the title to the button; however, do not assign a function to the button, as it is for title purposes only.



## Hiding a panel border

You can display panels with or without borders. Quite often, screens are created with all panel borders hidden, to create a seamless screen effect on the POS terminal.

### To hide a panel border:

1. Select or open the **panel** for which you want to hide the border.
2. Locate the **Appearance** group bar in the Properties window.
3. Select **True** from the 'Hide panel border' drop-down list.



### Note

When you hide the panel border, the panel title does not appear on the panel.

## Adding an image to a panel

You can add bitmap images to the background of a panel. Select an image from the list of graphics preloaded into the database. An image must be uploaded using the Media Files function, before you can select it from the image list.

### To add an image to a panel:

1. Select or open the **panel** to which you want to add an image.
2. Locate the **Appearance** group bar in the Properties window.
3. Select the **Image drop-down list** and choose a standard graphic.

-or-

If you want a custom image:

- a. Select **Custom** from the Image drop-down list. The Custom image property appears under the Image property.
  - b. Click the **Custom drop-down list**, and then double-click the desired graphic.
4. Select a desired **image layout**.
  5. Select the **transparency** of the image. **Note:** This option is available for custom images only.

## Changing the color of a panel

When you create panels for your screens, it is often necessary to apply a different color to a panel.

### To change the color of a panel:

1. Select or open the **panel** for which you want to change the color.
2. Locate the **Appearance** group bar in the Properties window.
3. Select the desired **background color**.

-or-



If you want a custom color:

- a. Select **Custom** from the 'Background Color' drop-down list. Additional properties appear under the Background Color property.
- b. Click in the **Custom Background Color** property, then click the **down arrow**. A list of available colors appears.
- c. Select a **color** from the 'Custom,' 'Web,' or 'System' tab. The color appears on the selected panel.

## Moving a panel

You can move a panel to a desired location on your workspace. You can move one panel at a time only. There are multiple ways to move a panel.



### Tip

Before you can move an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To move a panel using the Properties window:

1. Select or open the **panel** you want to move.
2. Locate the **Location** group bar in the Properties window.
3. Adjust the **X** and **Y** properties to modify the location of the panel.

### To move a panel using the mouse:

Move your **mouse** to the edge of the panel until you see four arrows, then hold the left mouse and drag the panel to the location you prefer.

### To move a panel using the keyboard:

Select the **panel** you want to move and press the appropriate **up**, **down**, **left**, or **right arrow** on the keyboard to move the panel to the location you prefer.

## Resizing a panel

You can change the size of a panel, as necessary. You can resize one panel at a time only. There are multiple ways to change the size of a panel.



### Tip

Before you can resize an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'



### To resize a panel using the Properties window:

1. Select or open the **panel** you want to resize.
2. Locate the **Size** group bar in the Properties window.
3. Adjust the **Width** and **Height** properties, to modify the size of the panel.

### To resize a panel using the mouse:

Move your **mouse** to the border handle of the panel until you see a double-sided arrow, then hold the **left mouse** and drag the **panel border** to the size you prefer.

## Copying a panel

Use the Duplicate Panel option to create a copy of a panel. A copy of a panel inherits all the properties of the original panel, such as name, appearance, template settings, text and color selections, size and location, as well as all button functions. When you copy a panel, the new panel appears on top of the original panel.

If you are a CFC user, you can create a copy of a corporate-owned panel or a store-owned panel. You must assign an owner to each copy you create; however, copies of store-level panels are automatically owned by the store.



### Caution

A copy of a panel cannot have the same name as the original panel.

### To copy a panel:

1. Select or open the **panel** you want to copy.
2. Select **Panel > Duplicate panel** from the Panel Editor menu bar. The copied panel appears on top of the original panel. If you are CFC user, select the appropriate **owner** for the copied panel and then click **OK**. **Tip:** You can also right-click a **panel** and select Duplicate Panel.
3. Move the **panel** to a location you prefer on the workspace area, and resize, as necessary.
4. Locate the **Identification** group bar on the Properties window.
5. Click the **left column** of the 'Number' property and assign a panel **number** in the right column.

**-or-**

If you want the system to assign a number to the panel:

- a. Click the **ellipses button (...)**. The Number Assignment dialog box appears.
- b. Select one of the following **options** and click **OK**.
  - **Next unassigned number** - Begins with the largest number currently in use and adds one (1), to determine the next available number.
  - **First unassigned number** - Begins with the lowest number (1), and displays the next, unassigned number.



- **First unassigned number following** - Begins with the previous number, and displays the next, unassigned number.
  - **This number** - Enables you to type any valid, unassigned number of your choice. This option defaults to the same number as the 'First unassigned number following' option. If you type a number that is already in use, or reserved for a different item type, an error message appears.
  - **View already assigned numbers** - Enables you to view a list of numbers already in use. Use the **left** and **right arrows** to scroll through the list.
6. Type a **name** for the panel. The name identifies the purpose of the panel, such as Main Floor, Section 2, Sandwiches, Manager Functions, and Tenders, to name a few.
  7. Type a general **description** for the panel.
  8. Complete the additional **options** for the panel, as necessary. A description of each Property window option is available in "Appendix A: Properties window descriptions."



### Reference

There are additional properties you can modify for a panel. Refer to the following procedures for more information:

[Setting panel properties](#)

[Adding a title to a panel](#)

[Adding an image to a panel](#)

[Changing the color of a panel](#)

9. Select **Panel > Save Panel** from the Panel Editor menu bar.

## Locking a panel in place

After you are finished working with a panel, including the buttons on the panel, you can lock the position of the panel and buttons. This way, the panels and buttons remain in the desired location.

### To lock a panel in place:

1. Select the **panel** you want to lock.
2. Locate the **Appearance** group bar in the Properties window.
3. Select **True** from the 'Mark as template' property drop-down list. The 'Fixed panel position' and 'Fixed button layout' properties automatically set to 'True.'

-or-

Select **True** from the 'Fixed panel position' drop-down list, if you want to lock only the panel in place.

-or-



Select **True** from the 'Fixed button layout' drop-down list, if you want to lock only the buttons in place.



#### Tip

We recommend you set the 'Mark as template' to True on all completed panels, to prevent accidental changes to the panel. Do not set this property to True until the panel is complete; otherwise, you cannot continue to make changes to the panel.

## Creating a version of a panel

If you manage multiple sites using CFC, create a version of a panel when you need to accommodate menu variations, such as a special menu item button or a store-specific promotion for one or more stores. You create a version of a panel from the existing 'primary' panel.

### To create a version of a panel:

1. Open the **panel** you want to version.
2. Select **Panels > New Panel Version** from the Panel Editor Main menu. The Select Panels option appears. **Tip:** You can also right-click a panel and select New Panel Version.
3. Open the **panel** for which you want to create a version. The primary panel appears.
4. Click **Version**. The Version Assignment dialog box appears.
5. Select from **one** of the following options:

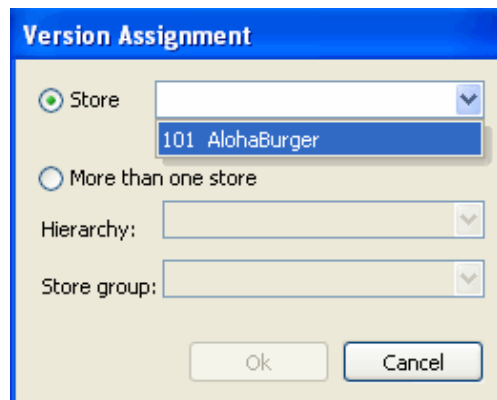


Figure 29 Version Assignment Dialog Box

- **Store** - Allows you to assign the version to a specific store. Click the **drop-down list** to select a store.
- **More than one store** - Allows you to assign the version to a group of stores, for a designated hierarchy. The list of available store groups is filtered based on the hierarchy you select. Select a **hierarchy** from the drop-down list, and then select a **store group**. **Note:**



- Once selected, you cannot change the hierarchy, and all subsequent versions you create for the same primary record, must use the same hierarchy.
- Click **OK**. New information for the version appears in the Properties window.

Properties	
Quick Service Panel:3 Beverages (Version)	
Properties	
VersionAssignment	101 AlohaBurger
StartDate	9/26/2007
EndDate	
Number	3
Name	Beverages
Description	Beverages
<input checked="" type="checkbox"/> Layout	
Location	284, 55
Size	460, 411

Figure 30 Version-Related Properties

- Locate the **Identification** group bar. The 'Record number' and 'Name' options are the same as the primary panel. A 'Version assignment' option appears, which displays the store, or store group/hierarchy combination you selected.
- Select a **Start date** to indicate the first day you want the version active at the store.
- Select an **End date** to indicate the last day you want the version active at the store.
- Assign a **Description** to the version panel that indicates the purpose of the panel.
- Make the necessary changes to any of the other settings for the version record. For help on an option, click the **option**, and then press **F1** to display field-level Help.
- Select **Panel > Save Panel** from the Panel Editor menu bar.

### Saving a panel

Anytime you are working with a single panel or elements on a panel, you should save the panel as often as necessary. When you are working with multiple panels at a time, it is easier to save all panels at one time, than it is to save each panel individually.



#### Caution

An asterisk \* on a panel indicates the panel is not saved.

#### To save a panel:

- Open the **panel** you want to save.
- Select **Panel > Save Panel** from the Panel Editor menu bar.

-or-



Right-click the **panel** and select **Save Panel**.

**To save all panels on a screen:**

- Select **Panel > Save All Panels** from the Panel Editor menu bar.
- or-
- Right-click in an **empty area** of the workspace and select **Save All Panels**.

## Closing a panel

If you do not need a panel to appear on the workspace, you can close the panel, as necessary. When you are working with multiple panels at a time, it is easier to close all panels at one time, than it is to close each panel individually.

**To close a panel:**

1. Open the **panel** you want to close.
  2. Select **Panel > Close Panel** from the Panel Editor menu bar.
- or-
- Right-click the **panel** and select **Close Panel**.

**To close all panels on a screen:**

Select **Panel > Close All Panels** from the Panel Editor menu bar.

-or-

Right-click in an **empty area** of the workspace and select **Close All Panels**.

## Deleting a panel

You can delete a panel, if it is not currently assigned to a screen.

**To delete a panel:**

1. Open the **panel** you want to delete.
  2. Select **Panel > Delete Panel** from the Panel Editor menu bar.
- or-
- Right-click the **panel** and select **Delete Panel**.
- A confirmation message box appears.
3. Click **OK** to confirm the deletion.



## Working with buttons on a panel

Buttons are objects you place on a panel that perform specific functions or enhance the appearance of a panel. An element can range from buttons and images to recipes and instructional videos.

Below are descriptions of the panel elements you can work with in Panel Editor.

### Understanding button types

The buttons you place on a panel enable you to perform the POS functions needed for your restaurant. Each button in Screen Designer performs a different function on the POS terminal. You use only the buttons you need in your operation. Although each button serves a different purpose, there are some common elements that enable us to group button functions into the following categories:

- **Order entry functions** - Indicates these buttons are most likely used on menu, check function, or operations panels. Examples include: Combine Order, Delivery, Get Check, New Order, Order Item, Reprint Check, and more.
- **Employee functions** - Indicates these buttons are most likely used on employee-related panels. Examples include: Clock In/Out, Checkout, Change Password, Fingerprint Scanner Enroll, and more.
- **Manager functions** - Indicates these buttons are most likely used on manager-related panels. Examples include: Allow Clock In, Assign Drawer, Clear Password, Release Locked Employee, and more.
- **Tender functions** - Indicates these buttons are most likely used on payment-related panels. Examples include: Adjust Payment, Script, Promo, Refund, and more.
- **System functions** - Indicates these buttons are most likely used on system-related panels, or when you interface with external systems and devices. Examples include: Calibrate, End of Day, PMS Inquire, Reroute Video, Shutdown Terminal, and more.

### Understanding button Properties window

The Properties window lists the current properties for selected panel elements, such as buttons and images. This window appears automatically, so you can quickly view or make changes to the selected element. To close the Properties window, click **Close (X)**.

If you click a button, the Properties window displays the settings for the selected button, including the button text, color, action, and much more. When you select multiple panel elements, such as multiple buttons, the Properties window displays only those properties that are common to all the selected



elements. The Button Properties window also enables you to assign an action, or function to a button, which is necessary for the button to operate properly on the POS terminal.

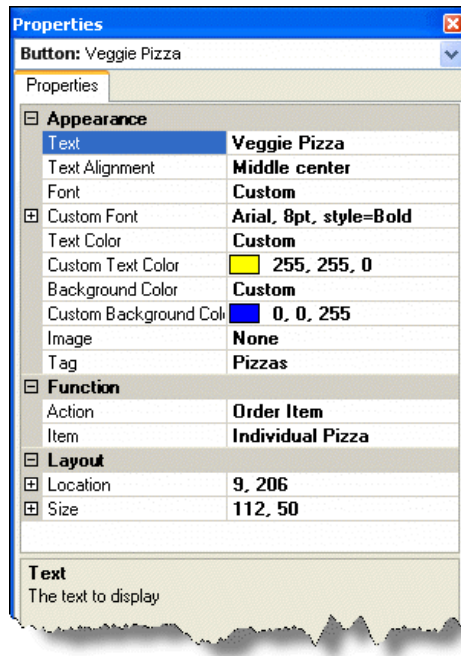


Figure 31 Example Properties Window for a Button



#### Tip

Use the Button Properties window in the same manner as the Panel Properties window.

### Understanding button tags

As you add buttons to panels, you may have certain buttons that do not need to be active at the store at all times. For example, if you sell specialty beverages, such as a pumpkin spice latte, over the winter season, you probably want the button to appear on the order entry screen during the winter season only.

To activate and deactivate a button on a panel, you have to set an Activate Panel Button event using the Event Schedules function. If you have many buttons that have to be activated and deactivated, the task to set an event for each individual button can be tedious.

The system offers a way for you to activate and deactivate several buttons at one time. The Tags function enables you to create groupings, to which you can assign buttons of like properties. For example, if you have other winter beverages in addition to the pumpkin spice latte example, you



might create a Tag grouping called Winter Beverages. Later, as you add a winter beverage button to a panel, you can associate the button to the Winter Beverages tag through the Properties window.

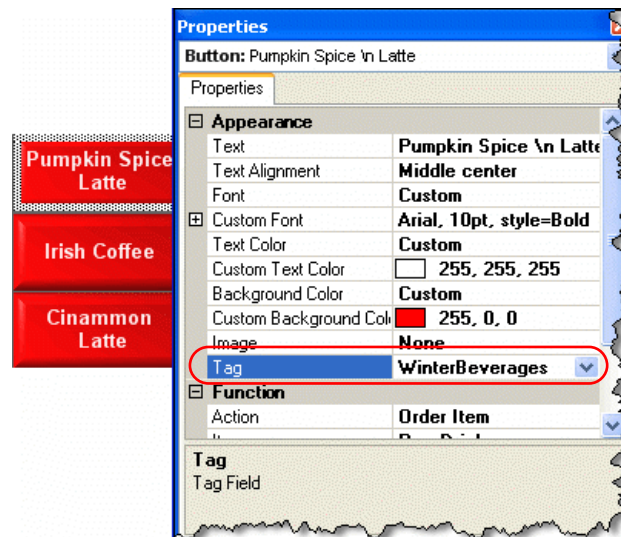


Figure 32 Example of a Beverage Button Associated to a Tag

When you set an event to activate or deactivate the winter beverages, for a particular reason, you need only set one event for the Winter Beverages tag, and each beverage button associated to that tag will activate or deactivate appropriately.

Considering a button must be associated with a tag before you can activate and deactivate it as part of a tag group, it is best practice, and easier, to associate a button to a tag when you add the button to a panel. However, this feature is not just for new buttons; you can associate an existing button to a tag at any time.



## Understanding the button grid tool

The button grid streamlines and simplifies the process of organizing and resizing multiple buttons to an almost effortless task. This feature helps you make layout changes to your buttons while keeping each button stationary, aligned, and evenly spaced.

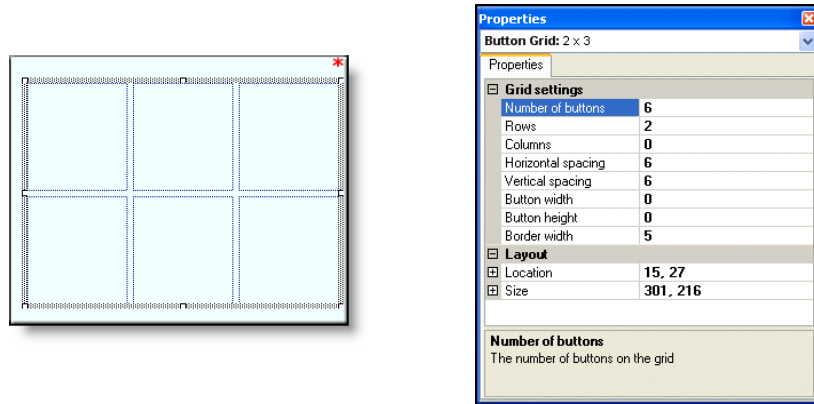


Figure 33 Button Grid and Corresponding Properties

Use the 'New Button Grid' option to lay out a grid on your panel, then use the Properties window to specify the number of buttons and the dimensions of the grid, including spacing and border options. When you have the number of buttons laid out the way you want on the panel, use the 'Fill Grid with Buttons' option to make buttons appear on the panel, within the area indicated by the grid. When you are finished with the grid, select an edge of the grid and press Delete to remove it from the panel. The buttons remain in place on the panel.

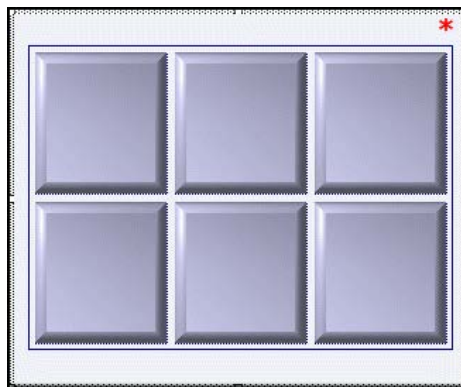


Figure 34 Button Grid Filled with Buttons

As you add buttons to the grid, the buttons within the grid area resize to allow space for the new buttons. If you delete one or more buttons from within the button grid area, you can use the 'Consolidate Buttons' option and the 'Sort' options to reorganize the remaining buttons, starting from the top left corner of the button grid.



If you have existing buttons you want to move, resize, or realign, you can select two or more buttons and use the 'Convert to Grid' option to place a grid around the selected buttons and make changes, as needed.

The following lists the common actions you can perform on a button grid:

If you want to...	Do this...
Add a grid to a panel.	Right-click in the <b>panel</b> and select <b>New button grid</b> .
Remove a grid from the panel.	Select the <b>grid</b> and press <b>Delete</b> to remove it from the panel.
Add a grid around existing buttons.	Select the <b>buttons</b> you want to include in the grid, right-click, and select <b>Convert to Grid</b> .
Indicate the number of buttons in a grid.	Select the <b>grid</b> and in the Properties window, enter a value for the <b>Number</b> property.
Fill a grid with buttons.	Right-click the <b>grid</b> and select <b>Fill grid with buttons</b> .
Add a button to a grid.	Click a <b>button</b> outside the grid, then drag and drop it to the location you prefer, inside the grid.
Rearrange buttons inside a grid.	Click the <b>button</b> you want to rearrange and drag it to the location you prefer, inside the grid.
Add rows or columns to a grid.	Select the <b>grid</b> and in the Properties window, enter a value for the <b>Row</b> or <b>Column</b> property.
Move a grid.	Move your <b>mouse</b> to the edge of the grid until you see four arrows, then hold the <b>left mouse</b> and drag the <b>grid</b> to location you prefer.
Resize a grid.	Move your <b>mouse</b> to the border handle of the grid until you see a double-sided arrow, then hold the <b>left mouse</b> and drag the <b>grid border</b> to the size you prefer.
Consolidate scattered buttons in a grid.	Right-click the <b>grid</b> and select <b>Consolidate buttons</b> .
Sort buttons by button text.	Right-click the <b>grid</b> and select <b>Sort buttons horizontally</b> or <b>Sort buttons vertically</b> .
Remove a button from the grid.	Select the <b>button</b> you want to remove and press <b>Delete</b> .



## Understanding the button lasso tool

You can select, or lasso, multiple buttons on a panel, to move, resize, or change the properties of the buttons all at one time.

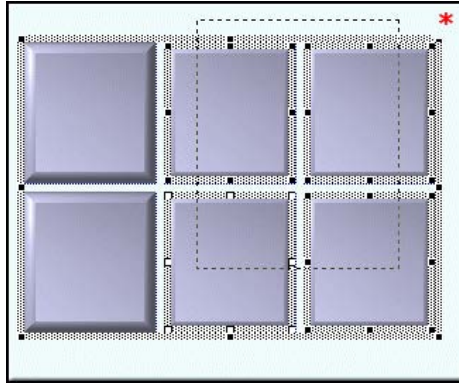


Figure 35 The Lasso Tool with Four Buttons Selected

### To select multiple buttons on a panel using the lasso:

- With the desired panel active, press and hold the **Shift key** and drag the mouse over the buttons you want to select.
- or-
- With the desired panel active, click in an **empty area of the panel**, then drag the **mouse** over the buttons you want to select. A border appears around each selected button.

## What you can do with buttons

You can do the following things with buttons:

### Adding a basic button

You can place one or more rectangular buttons on the panels you plan to use on the POS terminal. Buttons are always placed on panels, and you can define the size, shape, color, text, and position of a button, as well as the function, or behavior, of the button.



#### Tip

Before you can add buttons to an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

There are multiple ways to add buttons to a panel. You can add buttons one at a time or add multiple buttons all at one time. The following procedures explain how to add a basic button to a panel.



### To add a single button to a panel:

1. Click inside the selected **panel**.
2. Select **Panel > New Button** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **New Button**.

A blank button appears on the workspace and default properties for the button appear in the Properties window.

3. Locate the **Function** group bar in the Properties window.
4. Select the desired **button function** from the 'Action' drop-down list. Additional properties may appear under the 'Function' group bar that you need to complete for the button.

A complete list of button function descriptions are available in [Appendix B: Button function descriptions](#).

5. Locate the **Appearance** group bar in the Properties window.
6. Change the **Text** option, if you want a different button name to appear on the button.
7. Modify any additional **properties** for the button, if needed.
8. Select **Panel > Save Panel** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **Save Panel**.



### Reference

There are additional properties you can modify for the selected button. Refer to the following procedures for more information:

[Changing the color of a button](#)

[Changing the font of a button](#)

[Adding an image to a button](#)

[Resizing a button](#)

[Moving a button](#)

[Aligning and spacing a group of buttons](#)

[Sorting a group of buttons](#)

### To add multiple buttons to a panel:

1. Click inside the selected **panel**.
2. Select **Panel > New Button Grid** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **New Button Grid**.



The grid appears in the middle of the panel.

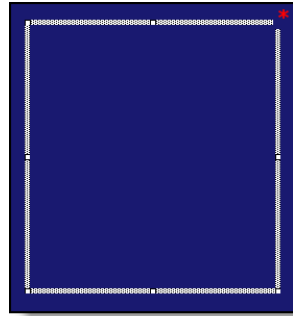


Figure 36 Button Grid without Buttons Filled In

3. Move and resize the **button grid** to match where you want buttons to appear on the panel.



**Tip**

To move the button grid, click the grid and drag it to the location you prefer. To resize the button grid, move your mouse to the border handle of the grid until you see double-ended arrows, then hold the left mouse and drag the grid border to a size you prefer.

4. Locate the **Grid settings** group bar in the Properties window.
5. Type the **Number of buttons**. The button grid displays lines to indicate the number and size of the buttons.
6. Right-click inside the **button grid** and select **Fill grid with buttons**. The grid fills in with the specified number of buttons and default properties, for the last button added, appear in the Properties window.

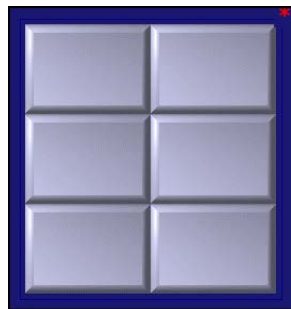


Figure 37 Button Grid with Buttons Filled In



**Tip**

If desired, you can keep the button grid in place until you are finished modifying the layout of the buttons, as well as the properties of each button.



7. Select a **button**, and then locate the **Functions** group bar in the Properties window.
8. Select the desired **button function** from the 'Action' drop-down list. Additional properties may appear under the 'Function' group bar that you need to complete for the button.  
A complete list of button function descriptions are available in [Appendix B: Button function descriptions](#).
9. Locate the **Appearance** group bar in the Properties window.
10. Change the **Text** option, if you want a different button name to appear on the button.
11. Modify any additional **properties** for the button, if needed.
12. Repeat steps **8** through **12** for each remaining button.
13. When you are finished with the button grid, select the **grid** and press Delete. The buttons remain in place on the panel.
14. Select **Panel > Save Panel** from the Panel Editor menu bar.  
**-or-**  
Right-click the **panel** and select **Save Panel**.



### Reference

There are additional properties you can modify for the selected buttons. Refer to the following procedures for more information:

[Changing the color of a button](#)

[Changing the font of a button](#)

[Adding an image to a button](#)

[Resizing a button](#)

[Moving a button](#)

[Aligning and spacing a group of buttons](#)

[Sorting a group of buttons](#)

## Adding a menu item button

You must add menu item buttons to a panel before you can order the items from the POS terminal.

### To add an item button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Order Item** from the 'Action' property drop-down list. An additional option appears.
4. Select the **menu item** to assign to the button from the 'Item' property drop-down list.
5. Locate the **Appearance** group bar in the Properties window.
6. If you want to assign a different item name for the button, click the **left column** of the 'Text' property and in the right column, type a different **name**. The size of the button affects how a



name appears on a button. The text is centered on the button and you can type ‘\n’ between words to make the text that follows the ‘\n’ appear on a second line. For example, type ‘Hot\nTamale’ to have ‘Hot’ appear on the first line and ‘Tamale’ appear on the second line of a button. The Text property can be up to 40 characters.

7. If desired, modify the **font**, **background color**, and **image** for the button.

## Adding an image to a panel

You can add one or more bitmap images to a button that are not part of the panel background. For example, you can add a company logo to a panel, and move it anywhere you want on the panel. Select a bitmap image from the list of graphics preloaded into the system database. An image must be uploaded using the Media Files function, before you can select it from the image list. **Note:** Bitmap images have a .bmp file extension.

### To add a bitmap to a panel:

1. Select the **panel** to which you want to add a a bitmap.
2. Select **Panel > New Image** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **New Image**.

The image grid appears in the panel.

3. Drag the **Image grid** to the desired location in the panel.
4. With the image grid selected, locate the **Appearance Settings** group bar in the Properties window.
5. Select the **Image drop-down list** and choose a standard graphic.

**-or-**

If you want a custom image:

- a. Select **Custom** from the Image drop-down list. The Custom image property appears under the Image property.
  - b. Click the **Custom drop-down list**, and then double-click the desired graphic.
6. Select the **transparency** of the image. **Note:** This option is available for custom images only.
  7. Select **Panel > Save Panel** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **Save Panel**.



## Selecting multiple buttons

You can select more than one button at a time when you need to resize, move, or sort a group of buttons, as well as modify attributes for a group of buttons at one time.

### To select multiple buttons on a panel:

- With the desired panel active, press and hold the **Shift key** and drag the mouse over the buttons you want to select.
- or-
- With the desired panel active, click in an **empty area of the panel**, then drag the **mouse** over the buttons you want to select. A border appears around each selected button.
- or-
- Press and hold the **Ctrl key** and click each **button** you want to select. A border appears around each selected button.

## Changing the color of a button

When you add buttons to a panel, it is often necessary to apply a different color to a single button or a group of buttons at one time.

### To change the color of one or more buttons on a panel:

1. Select one or more **buttons** for which you want to change the color.
2. Locate the **Appearance** group bar in the Properties window.
3. Select the desired **background color**.

-or-

If you want a custom color:

- a. Select **Custom** from the 'Background Color' drop-down list. Additional properties appear under the Background Color property.
- b. Click the **Custom Background Color** property, then click the **down arrow**. A list of available colors appears.
- c. Select a **color** from the Custom, Web, or System tab. The color appears on each selected button.

## Changing the font of a button

You can change the font of the text that appears on a button:

### To change the button text font for one or more buttons on a panel:

1. Select one or more **buttons** for which you want to change the text font.
2. Select the desired **font**.

-or-



If you want a custom font:

- Select **Custom** from the 'Font' property drop-down list. The Custom font property appears under the Font property.
- Click the **Custom font property**, then click the **ellipses button (...)**. The Font dialog box appears.

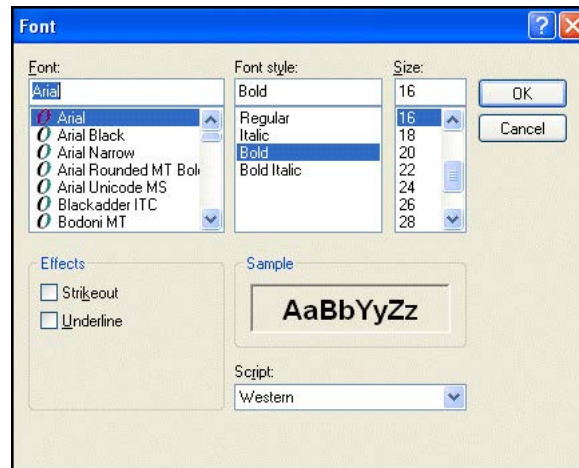


Figure 38 Font Dialog Box

- Select a **font**, **font style**, and **size**, then click **OK**. The button text appears with the new font style.

### Adding an image to a button

You can add bitmap images to the background of a button. For example, apply a product logo, such as Coke or Sprite, on a button to make it easy for a cashier to find on the POS terminal. Select an image from the list of graphics preloaded into the system database. An image must be uploaded using the Media Files function, before you can select it from the image list. **Note:** Bitmap images have a .bmp file extension.

#### To add an image to a button on a panel:

- Select one or more **buttons** to which you want to add an image.
- Select the **Image drop-down list** and choose a standard graphic.

**-or-**

If you want a custom image:

- Select **Custom** from the Image drop-down list. The Custom image property appears under the Image property.
- Click the **Custom drop-down list**, and then double-click the desired graphic.



3. Select a desired **image layout**.
4. Select the **transparency** of the image. **Note:** This option is available for custom images only.

## Resizing a button

You can change the size of a single button or multiple buttons at one time.



### Tip

Before you can resize buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To resize a single button on a panel using the Properties window:

1. Select the **button** you want to resize.
2. Locate the **Size** group bar in the Properties window.
3. Type the **width** and **height**, to modify the size of the button.

### To resize a single button on a panel using the mouse:

Move your **mouse** to the border handle of the button until you see a double-sided arrow, then hold the **left mouse** and drag the **panel border** to the size you prefer.

### To resize multiple buttons on a panel:



### Note

When you resize multiple buttons at one time, the system resizes the buttons based on the last button you select in the group.

1. Select the **buttons** you want to resize.
  2. Select **Layout > Sizing** from the Panel Editor menu bar, then select one of the following options:
    - **Make Same Width**
    - **Make Same Height**
    - **Make Same Size**
- or-**



Locate the **Size** group bar in the Properties window and adjust the **Width** and **Height** properties to modify the size of the buttons.

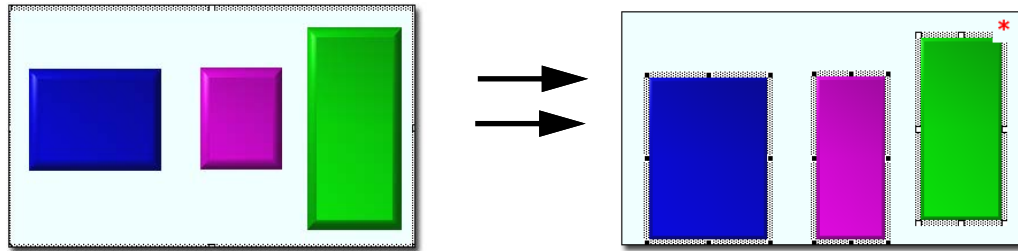


Figure 39 Resizing Buttons Using 'Make Same Height' Option



**Tip**

You can also press and hold the Shift key, then press the up, down, left, and right arrows on the keyboard to resize the buttons to the desired size.

## Moving a button

You can rearrange one or more buttons on a panel, as necessary.



**Tip**

Before you can move buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To move a single button on a panel using the Properties window:

1. Select the **button** you want to move.
2. Locate the **Location** group bar in the Properties window.
3. Adjust the **X** and **Y** properties to modify the location of the button.

### To move a single button on a panel using the mouse:

Move your **mouse** to the edge of the button until you see four arrows, then hold the left mouse and drag the button to the desired location.

### To move a single button on a panel using the keyboard:

Select the **button** and press the appropriate **up**, **down**, **left**, or **right arrow** on the keyboard to move the button to the desired location.



**To move multiple buttons on a panel:**

1. Select the **buttons** you want to move.

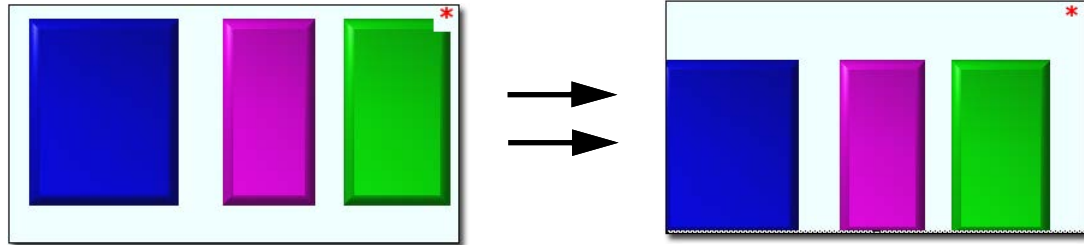


Figure 40 Moving a Group of Buttons on a Panel

2. Press the **up**, **down**, **left**, and **right arrows** on the keyboard to move the buttons to the desired location.

**-or-**

Locate the **Location** group bar in the Properties window and adjust the **X** and **Y** properties to modify the location of the buttons.

### Aligning and spacing a group of buttons

You can align a group of buttons on a panel by the top, bottom, left, or right sides. You can also center a group of buttons, and create an even space between buttons.



**Tip**

Before you can align buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'



### To align or evenly space multiple buttons on a panel:

1. Select the **buttons** you want to align.
2. Select **Layout > Alignment** from the Panel Editor menu bar, then select one of the following options:

• <b>Align Left</b>	• <b>Space evenly horizontally</b>
• <b>Align Right</b>	• <b>Space evenly vertically</b>
• <b>Align Top</b>	• <b>Center</b>
• <b>Align Bottom</b>	• <b>Center horizontally</b>
•	• <b>Center vertically</b>

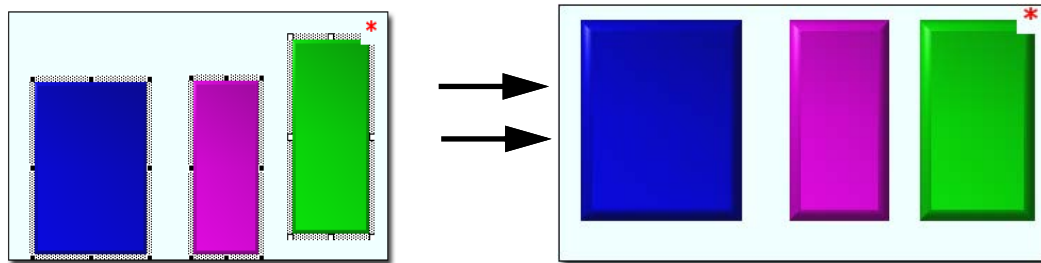


Figure 41 Aligning Multiple Buttons on a Panel Using 'Align Top' Option

### Sorting a group of buttons

You can sort a group of buttons on a panel, based on the button text, either horizontally or vertically. To sort buttons, you must first place a button grid around the buttons, if a grid does not already exist.



#### Tip

Before you can sort buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To sort multiple buttons on a panel using a button grid:

1. Select the **buttons** you want to sort.
2. Right-click one of the **buttons** and select **Convert to grid**. A border appears around the selected buttons.
3. Right-click the **button grid**.
4. Select one of the following options:
  - **Sort buttons horizontally**
  - **Sort buttons vertically**

The buttons re-sort on the panel as follows:





5. Select the **button grid** and press **Delete** to remove it from the panel. The buttons remain in place on the panel.

## Deleting a button

You can delete a button from a panel, if the panel is not currently assigned to a default screen.



### Tip

Before you can delete buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To delete a single button from a panel:

1. Select the **button** you want to delete.
2. Press **Delete** on the keyboard.

**-or-**

Right-click the **button** and select **Delete**.

### To delete multiple buttons from a panel:

1. Select the **buttons** you want to delete.
2. Press **Delete** on the keyboard.

**-or-**

Right-click and select **Delete**.



## Scheduling an 'Activate Panel Button' event

Use the **Activate Panel Button** event under Maintenance > System Settings > Event Schedule, to manage when certain buttons appear on your order entry screen. As you add buttons to panels, you may have certain buttons that do not need to be active at the store at all times. For example, if you sell specialty beverages, such as a pumpkin spice latte, over the winter season, you probably want the button to appear on the order entry screen during the winter season only. To regulate when a button appears, you must add the event, and select a specific 'tag' to associate to the event. A tag is a user-defined group you can assign to one or more buttons. When a button is assigned to a tag group, you can easily activate and deactivate multiple buttons at one time. **Related Requirement:** You set up Tags under Maintenance > System Settings > Tags.

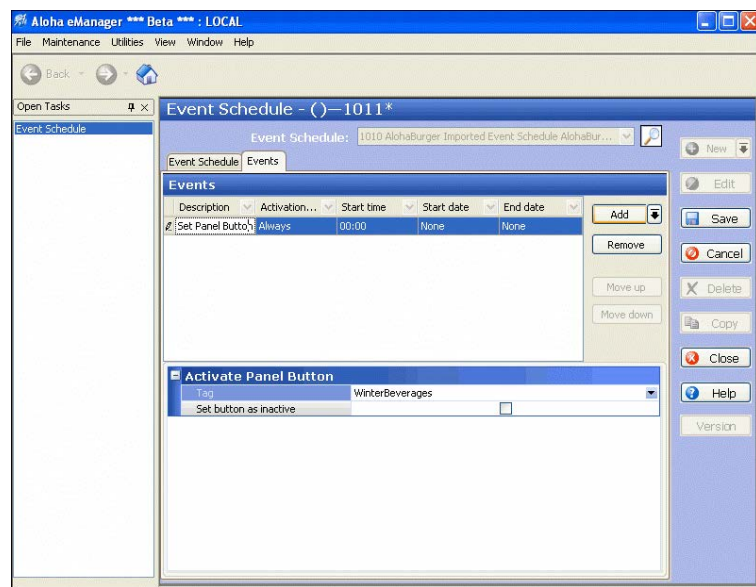


Figure 42 Example of an Activate Panel Button Event



## Working with screens

The Screen Editor tool enables you to build the default screens an employee with a specific job code sees when they log in to an Aloha POS terminal. You build a default screen by selecting the panels you want to include on the default screen only.

There are a few concepts to know about when creating default screens in Screen Editor.

### Default screen panels only

The default screen consists of only those panels you want an employee to see, by default, when they access the Aloha Table Service POS terminal. Each job code can have a different default screen; however, you can assign only one default screen at a time to a job code.

When you create panels in Panel Editor, you most likely create some panels that are accessible through 'chain' buttons. For example, you might have a 'Pay' button on the Order Entry Functions panel, that chains to, or opens, a secondary Tender or Payment panel, which allows you to apply payment to a check. You do not have to add that secondary Payment panel to the default screen; instead, you can add the Order Entry Functions panel to the default screen, and when a cashier touches the Pay button on the POS terminal, the system automatically displays the Payment panel.

So, although you might create quite a few panels for your POS Order Entry screen, you add only the panels an employee needs to see first, to the default screen; the other panels appear as necessary, when you press a corresponding 'chain' button.

### Understanding screen ownership and organization

If you are a CFC user, when you build a default screen, you indicate the owner to assign to the screen in the same manner you assign an owner to a panel. The owner determines who can view and make changes to the screen record in the database, as well as which store locations receive the screen in their local database.



#### Reference

To learn more about ownership, see [Understanding owners in Screen Designer](#).

Screen Editor uses panel numbers to organize the panels for quick identification. Some restaurants have a large number of panels from which to choose, when they build their default screens. In this situation, you can sort the list of panels for your screens by name or number and you can use the 'Search' function to quickly locate a specific panel by text.

### Identifying overlapping panels

You cannot save a screen if there are overlapping panels. This is because you need access to every button on each panel. If you have panels that overlap on your default screen, return to Panel Editor, and resize the panels to ensure they do not overlap.

Of course, when you create panels in Panel Editor, you can overlap some panels on purpose. These are secondary panels that you access with chain buttons, during the course of completing an order



transaction. These secondary panels are not part of the default screen; therefore, these panels can overlap.

## Understanding job code assignment

After you create a default screen, you must assign the default screen to a job code before an employee can access the default screen on an Aloha POS terminal. You can create as many default screens as you need for your establishment; however, keep in mind that a job code can have only one default screen assigned to it at a time.

## Understanding default screen versioning

If you manage multiple sites using CFC, you can create a version of a primary panel to use when one or more stores have variations in their order entry screens. Additionally, you can create a version of a default screen, when one or more stores need different panels assigned, for a certain screen, such as a cashier screen.

Screen versioning uses standard versioning, which means any screen version you create overrides its primary default screen indefinitely, as there are no start and end dates used with standard versioning. As long as the version exists, it will be active at the store. If you no longer want a version of a default screen available at a store, you delete the version, and the primary default screen will be in effect at the store.

Although you can create a version of a default screen, when you select different panels to add to the versioned screen, the panels available for selection are 'primary' panels only. If a version of a panel exists in the database, the version will automatically override its primary panel at designated stores, based on the version assignment, and start and end dates of the versioned panel.

If you are a corporate employee and you create a version of a default screen for a specific store, you can assign corporate-owned panels to the versioned screen; however, store employees cannot create a version of a default screen.



## Introducing Screen Editor

The Screen Editor environment contains specific tools to help you create and manage POS screens.

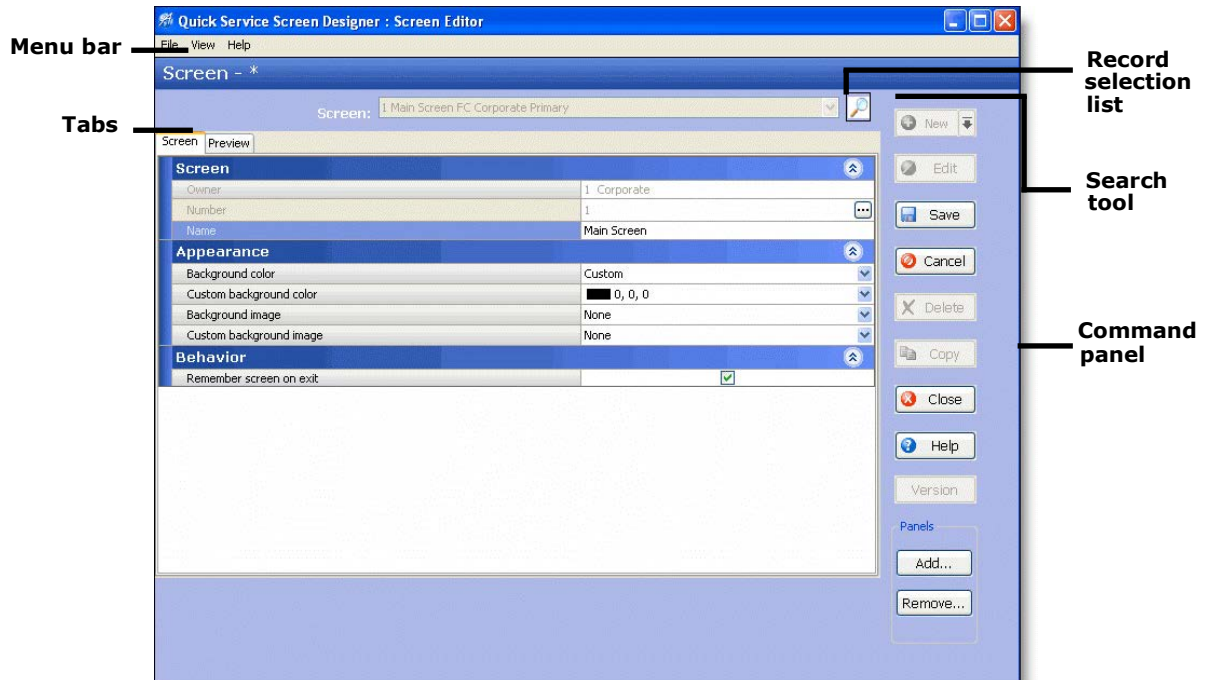


Figure 43 Screen Editor Screen

### Menu bar

**File** — Enables you to exit Screen Editor and return to the system, exit the system application, or switch to Panel Editor.

**View** — Enables you to show or hide the Properties window and set the color scheme (skins) for panels.

**Help** — Enables you to get online Help for Screen Designer and Screen Editor, as well as product version information.

### Screen tab

The Screen tab contains the basic properties for a selected screen. You can quickly view the number and name for the screen, as well as the appearance settings for the screen.

### Preview tab

The Preview tab enables you to view the panels you add to the screen; thereby, helping you determine if you have the correct panels in place for the default screen.



## Command panel

The Command panel provides action buttons that perform specific functions in Screen Editor, such as New, Save, and Cancel.

## Search button

A search button is available, next to the record selection list, which enables you to search for screens by text or by number. By default, all screen records are visible in the record selection list.

## What you can do with default screens

Here are some of the things you can do with default screens in Screen Designer:

### Opening and closing Screen Editor

You access Screen Editor through the Screen Designer application. After you save your screen, you can close Screen Editor at any time and return to the system main screen.

#### To open Screen Editor:

1. Select **Maintenance > Screen Designer > Table Service Screen Designer** from the system menu bar. The Screen Designer home screen appears.
2. Click **Work with Screens**. The Screen Editor screen appears with the Screen tab displayed.

#### To close Screen Editor:

1. Select **File > Close Screen Editor** from the Screen Editor menu bar.  
-or-  
Click **Close (X)**.  
-or-  
Press **Ctrl+F4**.
2. If a confirmation message appears for you to save, select the desired **option**. The system returns to the system main screen.



#### Tip

You can also switch to Screen Editor while in Panel Editor. Select **File > Screen Editor** from the Panel Editor menu bar.

## Creating a screen

You create a default screen from the existing panels created in Panel Editor. Create as many default screens as needed for your establishment.



### To create a screen:

1. Click **New**. The Screen tab appears with the owner and default number assigned to the screen record. **Note:** If you are a CFC user, select the **owner** to assign to the screen and click **OK**.



#### Tip

If you press New, instead of pressing the drop-down arrow next to 'New,' the system automatically assigns the same owner as assigned to the user account under which you logged in to the system.

2. If you want the system to assign a different number to the screen, click the **left column** of the 'Number' property and in the right column, type the **new number**.

-or-

Click the **ellipses button (...)**. The Number Assignment dialog box appears.

3. Select **one** of the following options and click **OK**.

**Next unassigned number** — Begins with the largest number currently in use and adds one (1), to determine the next available number.

**First unassigned number** — Begins with the lowest number (1), and displays the next, unassigned number.

**First unassigned number following** — Begins with the previous number, and displays the next, unassigned number.

**This number** — Enables you to type any valid, unassigned number of your choice. This option defaults to the same number as the 'First unassigned number following' option. If you type a number that is already in use, or reserved for a different item type, an error message appears.

**View already assigned numbers** — Enables you to view a list of numbers already in use. Use the **left** and **right arrows** to scroll through the list.

4. Click the **left column** of the 'Name' property and in the right column, type a **name** for the screen. The name identifies the purpose of the screen, such as Cashier, Manager, and Drive-Thru, to name a few.
5. Select the desired **background color**. The background color fills the area behind the screen with solid color.

-or-

If you want a custom color:

- a. Select **Custom** from the 'Background color' drop-down list. Additional properties appear under the Background color property.



- b. Click in the **Custom background color** property, then click the **down arrow**. A list of available custom colors appears.
  - c. Select a **color** from the Custom, Web, or System tab. The background color fills the area behind the screen with solid color.
6. Select the desired **background image**. A Background image fills the area behind the screen with a specific image.

**-or-**

If you want a custom image:

- a. Select **Custom** from the drop-down list. The Custom background image property appears under the Background image property.
  - b. Click in the **Custom background image property**, then click the **ellipses button (...)**. The Media Control dialog box appears.
  - c. Click **Upload**. The Open dialog box appears.
  - d. Select the desired **bitmap image** and click **OK**. A preview of the image and the image file name appear in the Media Control dialog box.
  - e. Click **OK**. The image appears as a backdrop on the screen.
7. Select a desired **image layout**.
8. Select the **transparency** of the image.
9. Select **Remember screen on exit**, if you want the screen to remember the last panel touched upon exit, and return the employee to that panel when they sign back in to the POS terminal.



#### Note

If the next screen you want to add has the same owner as the previous screen, click **New** to create the next record; otherwise, click the **drop-down arrow** next to New, to create the next screen.

10. Click **Add**. The Add Panels dialog box appears.
11. Select each **panel** you want to add to the screen. To select multiple panels, hold down the **Ctrl** key and select each panel.
12. Click **OK**. The selected panels appear on the Preview tab.
13. Click **Save**, when finished.



## Opening a screen

You can quickly locate and open an existing screen from the Screen Editor record selection list.

### To locate and open a screen:

1. Click the **down arrow** next to 'Screen:' and select the desired **screen** from the 'Record Selection' drop-down list.
2. To sort screens by number or name, click the appropriate **column heading** in the 'Record Selection' list. **Note:** If you are a CFC user, you can also sort by owner.

## Adding a panel to a screen

You can add one or more panels to an existing default screen, as necessary.

### To add a panel to a screen:

1. Open the desired **screen** to which you want to add a panel, from the Record Selection list. The selected record appears on the screen.
2. Click **Edit**.
3. Click **Add**. The Add Panels dialog box appears.
4. Select the **panel** you want to add to the screen. To select multiple panels, hold down the **Ctrl** key and select each panel.
5. Click **OK**. The selected panels appear on the Preview tab.
6. Click **Save**, when finished.

## Removing a panel from a screen

You can remove a panel from an existing default screen, as necessary.

### To remove a panel from a screen:

1. Open the desired **screen** from which you want to remove a panel, from the Record Selection list. The selected record appears on the screen.
2. Click **Edit**.
3. Click **Remove**. The Remove Panels dialog box appears.
4. Select the **panel** you want to remove from the screen. To select multiple panels, hold down the **Ctrl** key and select each panel.
5. Click **OK**. The selected panels no longer appear on the Preview tab.
6. Click **Save**, when finished.



## Applying color to a screen

You can apply color to the background section of a screen, to give the screen a harmonious, theme-based look.

### To apply color to the background area of a screen:

1. Open the desired **screen** to which you want apply background color, from the Record Selection list. The selected record appears on the screen.
2. Click **Edit**.
3. Select the desired **background color**. The background color fills the area behind the screen with solid color.

**-or-**

If you want a custom background color:

- a. Select **Custom** from the 'Background color' drop-down list. The Custom background color property appears under the Background color property.
  - b. Click in the **Custom background color** property, then click the **down arrow**. A list of available custom colors appears.
  - c. Select a **color** from the Custom, Web, or System tab. The background color fills the area behind the screen with solid color.
4. Click the **Preview** tab to view the changes.
  5. Click **Save**, when finished.

## Adding an image to a screen

You can add an image to the background section of a screen, to enhance the look of the screen. Select an image from the list of graphics preloaded into the system database. An image must be uploaded using the Media Files function, before you can select it from the image list.

### To add an image the background area of a screen:

1. Open the desired **screen** to which you want to add an image, from the Record Selection list. The selected record appears on the screen.
2. Click **Edit**.
3. Select the **Background Image drop-down list** and select a standard **background image**. A Background image fills the area behind a screen with a specific image.

**-or-**

If you want a custom background image:

- a. Select **Custom** from the Background Image drop-down list. The Custom background property appears under the Image property.
- b. Click the **Custom background drop-down list**, and then double-click the desired graphic.



4. Select a desired **image layout**.
5. Select the **transparency** of the image. **Note:** This option is available for custom backgrounds only.
6. Click the **Preview** tab to view the changes.
7. Click **Save**, when finished.

### Creating a version of a screen

If you manage multiple sites using CFC, the system allows you to create a version of a primary screen, for select Maintenance functions. You can assign the version to a store, or store group. To assign a version to a store group, you must have existing store groups set up in the system.

#### To create a version of a default screen:

1. Open the desired **primary screen** for which you want to create a version, from the Record Selection list. The selected record appears on the screen.
2. Click **Version**. The Version Assignment dialog box appears.

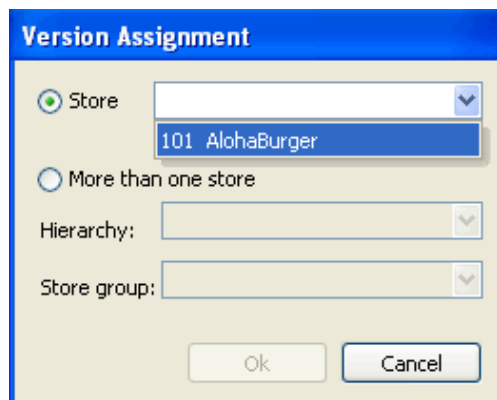


Figure 44 Version Assignment: Store or Store Group

3. Select from **one** of the following options:
  - Store - Allows you to assign the version to a specific store. Click the **drop-down list** to select a store.



#### Note

For standard versioning only, once you select a store, you cannot assign another version of the same primary screen to that store.

- More than one store - Allows you to assign the version to a group of stores, for a designated hierarchy. The list of available store groups is filtered based on the hierarchy you select. Select a **hierarchy** from the drop-down list, and then select a **store group**. **Note:** Once



- selected, you cannot change the hierarchy, and all subsequent versions you create for the same primary record, must use the same hierarchy.
4. Click **OK**. The system returns you to the function screen, and a version of the primary screen appears. The record number is the same as the primary screen. A Version Assignment option appears, which displays the store, or store group/hierarchy combination you selected.
  5. Use the **Add** or **Remove** buttons to modify the panels assigned to the version. Make changes to any of the other settings for the version record, as necessary.
  6. Click **Save**, when finished.



## Testing screens with Screen Simulator

The Screen Simulator tool enables you to perform a virtual test of a selected screen, including the panels and buttons used to build the screen.

Although you cannot make edits while in Screen Simulator mode, you can select a panel element and view the properties for that element. For example, if you select a button on one of the panels, the Properties window displays the function or action assigned to the button. You access Screen Simulator from the Panel menu in Panel Editor.

### Introducing the Screen Simulator screen

The Screen Simulator environment contains specific tools that help you test panel and button functionality.

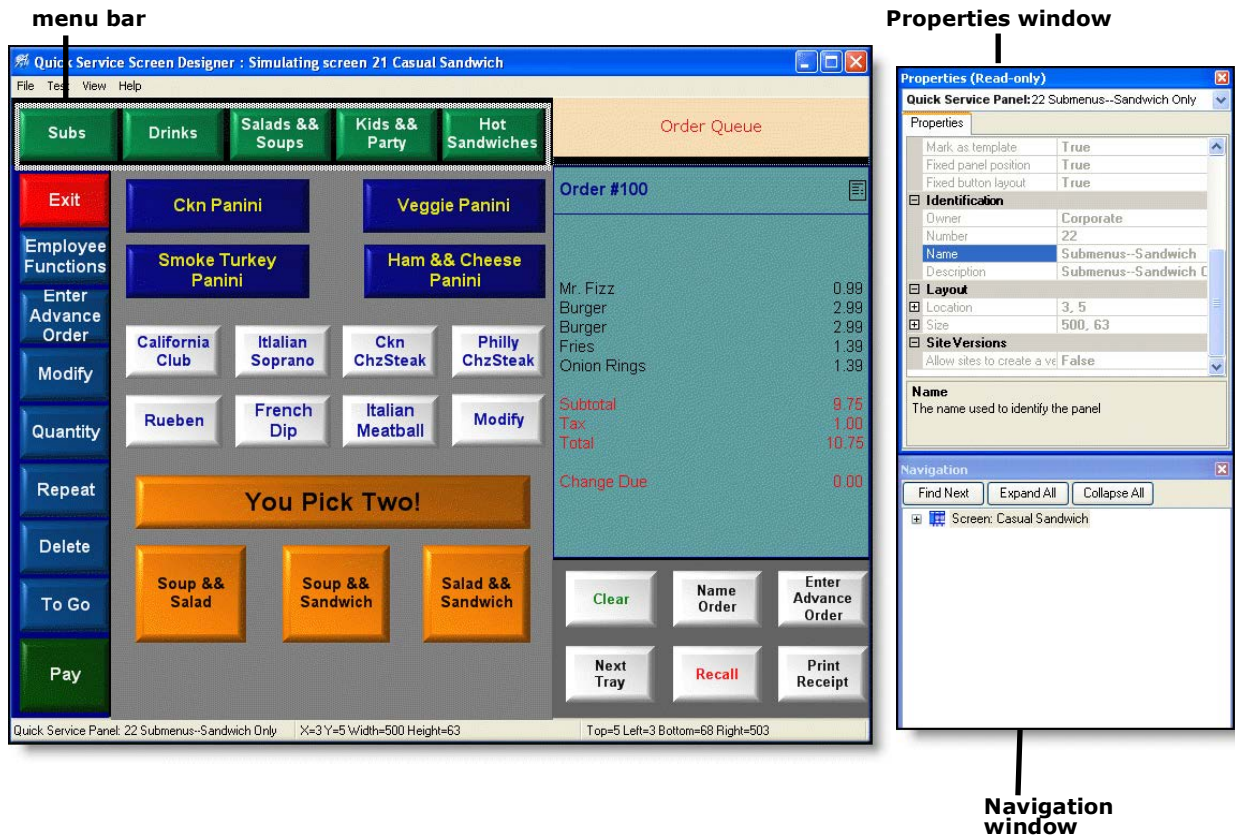


Figure 45 Screen Simulator Tool

### Menu bar

**File** — Enables you to exit Panel Editor, exit the system, or switch to Screen Editor.

**Test** — Enables you to restart a test or exit Screen Simulator and return to the Panel Editor screen.

**View** — Enables you to show or hide the Properties and/or Navigation window.



**Help** — Enables you to get online Help for Screen Designer and Screen Simulator, as well as product version information.

## Properties window

The Properties window lists the current properties for a selected screen element, such as a panel or button. This window appears at all times, so you can quickly view properties for a selected element. For example, if you click in a panel, the Properties Window displays the settings for the selected panel, including the title, font, color, ID number, location, size, and much more. If you click on a button, the Properties window displays the function property only. To close the Properties window, click **Close (X)**.

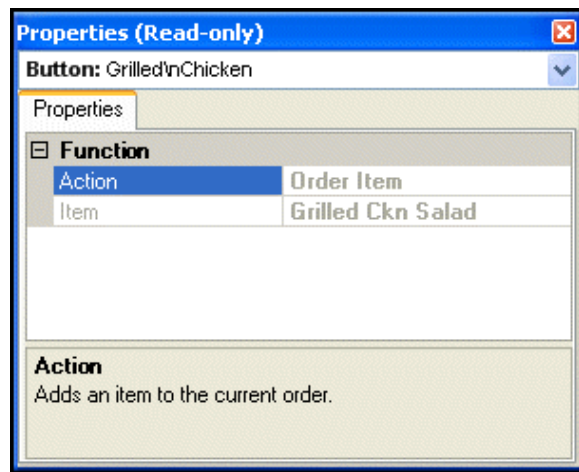


Figure 46 Read Only Properties Window



### Note

You cannot make changes to any properties for a selected panel or button in Screen Simulator. You must return to the Panel Editor screen to make changes.



### Navigation window

The Navigation window, located in the bottom right corner of Screen Simulator, enables you to view the screen flow of panels linked together by ‘chain’ buttons. You can verify that buttons ‘chain’ or link to the proper panels. When you double-click a button in the Navigation window, the navigation tree expands to where the button is in the screen flow and highlights the selected button.

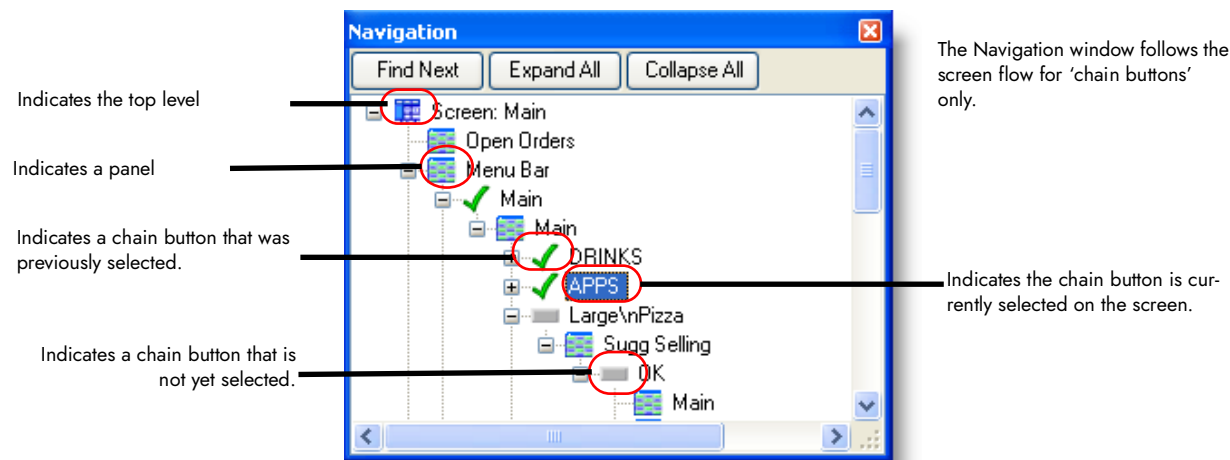


Figure 47 Screen Simulator Navigation Window

### To use the Navigation window:

By default, when you access Screen Simulator, the Navigation tree is fully collapsed and only the top-level default screen appears. The following lists the common actions you can perform in the Navigation window:

If you want to...	Do this...
Expand a panel to its next sub-level.	Click the <b>(+)</b> sign next to a panel to show sub-level panels and ‘chain’ buttons for the selected panel.
Collapse a menu to its previous level.	Click the <b>(-)</b> sign next to a panel to hide the sub-level panels and ‘chain’ buttons for the selected panel.
Follow the screen flow for chain buttons on a specific panel.	<p>Select the <b>panel</b> you want to follow.</p> <p>Click <b>Find Next</b>. Starting with the first chain button on the panel, the Navigation window highlights the next instance of a chain button.</p> <p>Continue to click <b>Find Next</b> to follow the screen flow for that button. When the system finishes the screen flow for the first button on your selected panel, it goes to the next chain button on your selected panel and follows the screen button flow for that button. This continues until the screen flow for all chain buttons on your selected panel is displayed.</p>



If you want to...	Do this...
Show all panels and chain buttons for a screen.	Click <b>Expand All</b> . The Navigation window displays all panels and chain buttons for the screen.
Hide all panels and chain buttons for a screen.	Click <b>Collapse All</b> . The Navigation window hides all panels and chain buttons for the screen.

## What you can do with screen simulator

Here are some of the things you can do with Screen Simulator:

### Opening and closing screen simulator

You access Screen Simulator through Panel Editor. After you complete your screen test, you can close Screen Simulator at any time and return to the Panel Editor screen.

#### To open Screen Simulator:

1. Select **Panel > Test Screen...** from the Panel Editor menu bar. The Select Screen dialog box appears.
2. Select the desired **screen** and click **OK**.

-or-

Double-click the desired **screen**.

The Screen Simulator screen appears.

#### To close Screen Simulator:

Select **Test > Exit Test** from the Screen Simulator menu bar.

-or-

Click **Close (X)**.

-or-

Press **Ctrl+F4**.



#### Tip

You can also switch to Screen Editor while in Screen Simulator. Select **File > Screen Editor** from the Screen Simulator menu bar.



## Testing a screen

When you test a screen, you verify the button function properties and the chain links to other panels are correct.

### To test a screen:

1. Click the **first button** at the top-left of your screen. When you click a button, the Properties window displays the function assigned to the button so you can verify you applied the right function to the button. Also, diagonal lines appear on each button you click, to indicate you tested the button.
2. Continue to click each **button** on your screen. If you click a 'chain' button or a 'script' button that includes a 'chain' button, the Navigation window shows the location of the button in the navigation tree, and places a green check mark next to the button.
3. Verify the **correct panel** appears when you click a 'chain' button.
4. If you find any buttons you need to change, select **Test > Exit Test** from the Screen Simulator menu bar. The system returns you to the Panel Editor screen with all panels open for the screen you tested.
5. Make any necessary **changes**, then save and test your **screen** again in Screen Simulator.

## Restarting a test

While in Screen Simulator, if you need to re-verify buttons or panels you already checked, you can restart a screen test already in progress.

To restart a test, select **Test > Restart Test** from the Screen Simulator menu bar.



## Activating screens

After you create panels for your screens in Panel Editor, build the default screens in Screen Editor, and test the screens in Screen Simulator, you are ready to activate the order entry screens for use on POS terminals.

You can assign a default screen to an existing job code or terminal, to control which screen an employee always sees first, when they access a POS terminal. You can also restrict access to screens for employees required to clock in, but do not require access to the order entry system.

If you are CFC user for a multi-store POS database administrator, you also need to set up events or schedules that distribute screens and panels to one or more stores, based on the owner and activations dates assigned to each panel and screen. Additionally, each store must perform a manual or automatic refresh, to update the POS terminals with any new screens and panels they receive, before employees can access them on the POS terminals.

## Assigning a default screen to a job code

Table Service enables you to assign a screen to a specific job code, to indicate the default screen an employee with that job code always sees first, when they access a POS terminal. For example, you might assign a 'Delivery' default screen to an employee that handles delivery orders only, and needs to see the delivery screen first, no matter which POS terminal they use to take an order.



### Note

A default screen assigned to a job code overrides a default screen assigned to a terminal.

### To assign a screen to a job code:

1. Select **Maintenance > Labor > Jobcodes**. The Jobcode function screen appears with the Jobcode tab as the active tab.
2. Select the desired **job code** from the 'Record Selection' drop-down list. The options related to the selected job code appear.
3. Click **Edit**, then select the **Order Entry** tab.



- Click in the **left column** of the 'Order Entry Screen' option and in the right column, select the **default screen** to assign to the job code from the drop-down list. The default screen you select is available to all employees that clock in with that job code, no matter which POS terminal they use.

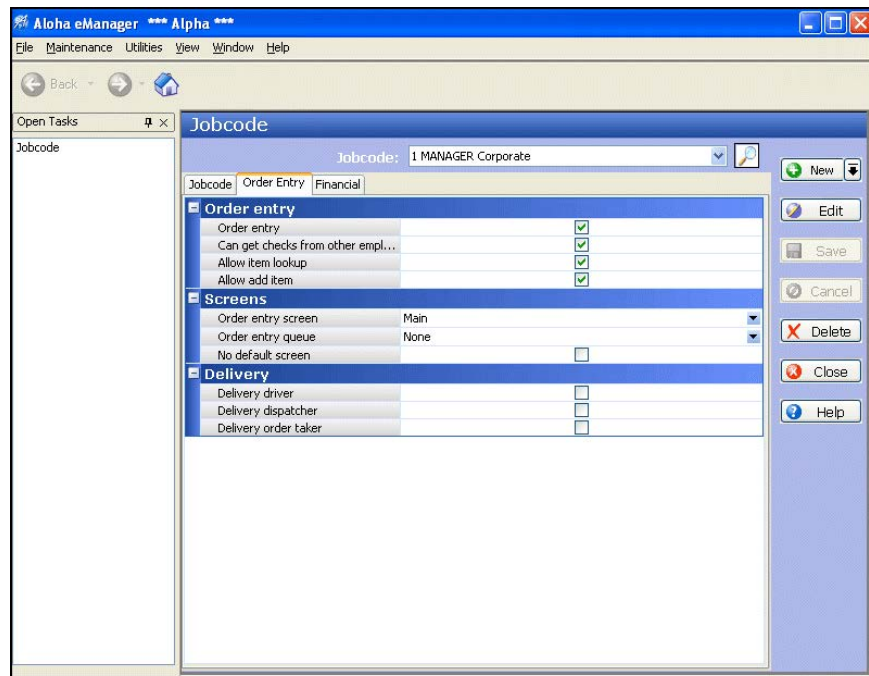


Figure 48 Assign a Screen to a Job Code

- Click **Save**, when finished.

## Assigning a default screen to a terminal

It is not mandatory to assign a default screen to a job code for an employee to have access to the screen. For example, if you have an employee that works both counter and drive-thru during a single shift, you may need your employees to see one type of default screen when entering counter orders, and a different default screen when entering drive-thru orders. In this situation, you assign the appropriate default screen to the terminal itself, and not to the job code assigned to your counter employees.

### Note

If a default screen is assigned to a job code, that default screen will override a default screen assigned to a terminal. Double-check that the job code does not have a screen selected in Maintenance > Labor > Jobcode > Order Entry tab.



### To assign a screen to a terminal:

1. Select **Maintenance > Hardware > Terminals** from the system Menu bar. The Terminal function screen appears with the Terminal tab displayed.
2. Select the desired **terminal** from the 'Record Selection' drop-down list. The options related to the selected terminal appear.
3. Click **Edit**, then locate the **Screens** group bar.
4. Click in the **left column** of the 'Table Service Screen' option and in the right column, select the **default screen** to assign the terminal from the drop-down list. The default screen you select is available to all employees that utilize that terminal, and do not already have a default screen assigned to their job code.

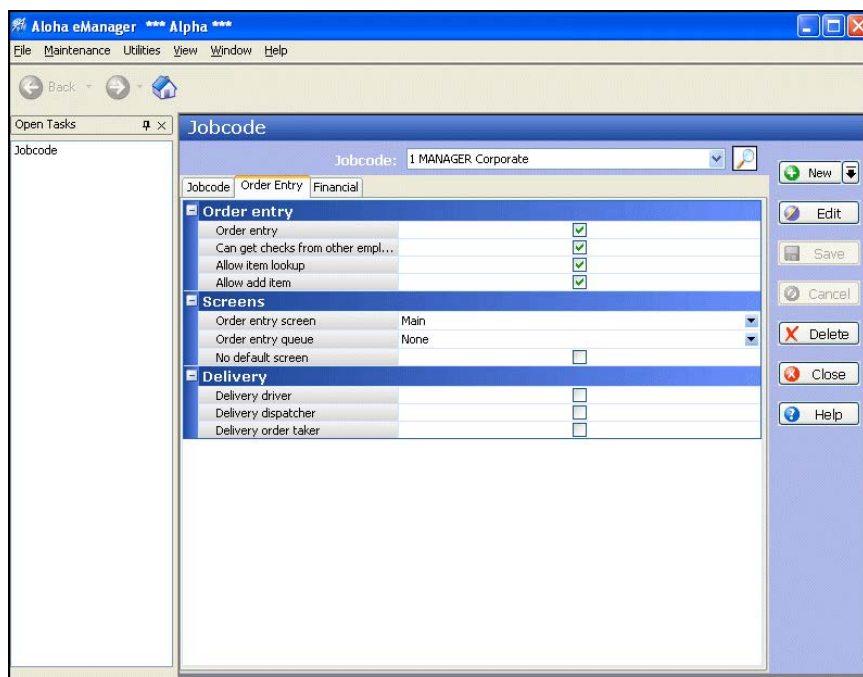


Figure 49 Assign a Screen to a Terminal

5. Click **Save**, when finished.

## Restricting access to all default screens

Every employee that requires access to a POS terminal does not necessarily need access to the order entry system. For example, kitchen staff required to clock in and out need access to a POS terminal; however, they do not need access to the order entry screens. In this situation, you can restrict access by activating the 'No default screen' option. When you restrict access to all default screens, neither the default screen assigned to the job code, nor the default screen assigned to the POS terminal, appear for any employee clocked in with the selected job code. The only screens that appear are the Login screen and Clock In/Out screen.



**To restrict access to a default screen:**

1. Select **Maintenance > Labor > Jobcodes** from the system Menu bar. The Jobcode function screen appears with the Jobcode tab displayed.
2. Select the desired **job code** from the 'Record Selection' drop-down list. The options related to the selected job code appear.
3. Click **Edit**, then select the **Order Entry** tab.

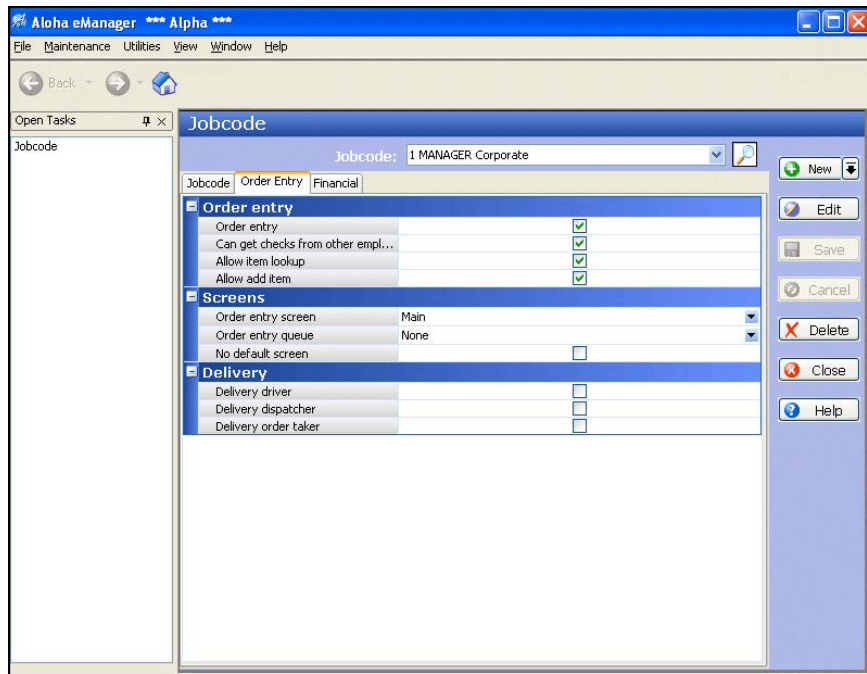


Figure 50 Assign a Screen to a Job Code

4. Select the **No default screen** check box.
5. Click **Save**.



**Tip**

You must select 'Shift required to clock in/out' on the Jobcode tab, to ensure employees with this job code can access the Clock In/Out screen.



## Scheduling a Set Job Screen event

Use the **Set Job Screen** event under Maintenance > System Settings > Event Schedule, to set the default screen for employees assigned to a specific job code. Add the event and if necessary, indicate the period of time the screen is in effect. If you do not specify a time period, the screen remains in effect at all times for the specified job code.

You can change to another screen before EOD occurs. To do this, create another Set Job Screen event for a different screen, and specify a different time.

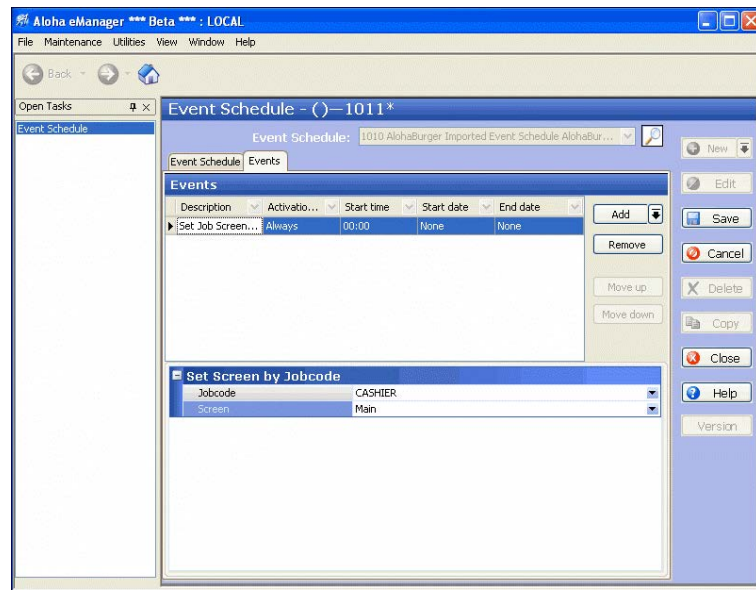


Figure 51 Example of a Set Job Screen Event



## Appendix A: Properties window descriptions

Appendix A provides definitions for each of the options available on the Properties dialog box.

Appendix A provides a description of each Properties window option in Panel Editor. This section is categorized by panel-related properties, button-related properties, and button grid properties. The properties for each group are listed in the order they appear on the Properties window.

### Panel window properties

The following descriptions apply to the properties available for a panel, in Panel Editor:

#### Group Bar: Appearance

**Title** — Designates the text used as the title of the panel. Add text to the title of the panel, if desired. The width of the panel should be considered when selecting a title. The text entered here appears on a system generated portion at the top of the panel. The background color of the system generated portion displays according to the Windows display configuration. If this property is left blank, the panel appears without a system title bar.

**Font** — Specifies the pre-defined character styles for the title text. Select from Custom, Very Large, Large, Medium, Small, Very Small, Title Bar, Title Panel, and Panel Button.

**Custom Font** — Enables you to specify a unique character style for the title text. Click the **ellipses button (...)** to select a font. This property is available when you select a custom font. You can add additional characteristics for the font. **Required Options:** You must select 'Custom' from the 'Font' drop-down list to enable this option.

- **Name** - Specifies the name of the font.
- **Size** - Specifies the size of the font.
- **Unit** - Determines the unit measure to use for the custom font. Select from World, Pixel, Point, Inch, Document, and Millimeter.
- **Bold** - Directs the font to appear in bold text.
- **GdiCharSet** - Used with fonts with a specific character set, such as a codepage other than the system CP\_ACP.
- **GdiVerticalFont** - Used with fonts, in a vertical alignment, with a specific character set, such as a codepage other than the system CP\_ACP.
- **Italic** - Directs the font to appear in italic text.
- **Strikeout** - Includes a line across the text, usually indicating the text was considered but then later crossed out.
- **Underline** - Includes a line under the text.

**Title Color** — Applies a color to the title text of the panel.



- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list
- **Custom** - Uses a custom color for the title of the panel. **Related Options:** This option enables the 'Custom Title Color' option.

**Custom Title Color** — Enables you to select a color from the color palette to apply to the title of the panel. **Required Options:** You must select 'Custom' from the 'Title Color' drop-down list to enable this option.

**Title Position** — Indicates the alignment or location of the title on the panel border. Select from Default, Left, Right, and Center.

**Background Color** — Applies a color to the background of the panel. Select from Custom and Skin.

- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list
- **Custom** - Uses a custom color for the background of the panel. **Related Options:** This option enables the 'Custom Background Color' option.

**Custom Background Color** — Enables you to select a color from the color palette to apply to the background of the panel. **Required Options:** You must select 'Custom' from the 'Background Color' drop-down list to enable this option.

**Image** — Enables you to add an graphic to the background of a panel. Additional properties appear when you select Custom.

- **Custom** - Uses a custom image for the background of the panel. **Related Options:** This option enables the 'Custom Image' option.
- **Information** - Inserts a lowercase letter 'i' for the background of the panel, indication the concept of information.
- **Alert** - Inserts an exclamation mark inside a triangle for the background of the panel. **Required Options:** You must enable the Alerts feature to use this feature.
- **Error** - Inserts a stop sign for the background of the panel.
- **Scroll up** - Inserts an upward arch for the background of the panel.
- **Scroll page up** - Inserts an upward arch and curve for the background of the panel.
- **Scroll down** - Inserts a downward arch for the background of the panel.
- **Scroll page down** - Inserts a downward arch and curve for the background of the panel.
- **Scroll left** - Inserts a leftward arch for the background of the panel.
- **Scroll right** - Inserts a rightward arch for the background of the panel.
- **Enter** - Inserts a leftward broken arrow for the background of the panel.



- **Backspace** - Inserts a leftward arrow for the background of the panel.

**Custom Image** — Uses a unique image to add to the panel background. Click the drop-down list to select an image. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Image Layout** — Allows you to choose the positioning of the image to the background of the panel, using a graphical display.

**Transparent Image** — Displays the background of the panel as the same color or image of the screen in which the panel resides, creating a 3-D effect. This effect is useful when a color is defined or when bitmaps are attached to the screen in Screen Editor. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Hide panel border** — Displays the panel with no borders. When set to 'True,' the system hides the border on the selected panel, and any text entered for the 'Title' property does not appear on the panel.

**Mark as template** — Locks the panel as a template in a fixed location on the workspace. All buttons on the panel are not available for edit. **Related Options:** This option automatically selects 'Fixed panel position' and 'Fixed button layout.'



#### Tip

We recommend you select 'Mark as Template' on all completed panels to prevent accidental changes to the panel.

**Fixed panel position** — Locks the panel in a fixed position on the screen; therefore, you can not accidentally move it to another part of the screen. **Related Options:** This option is automatically selected when you select 'Mark as template.'

**Fixed button layout** — Locks the button layout in a fixed position on the panel itself. You can not accidentally move buttons to another position on the panel, or add or delete them. **Related Options:** This option is automatically selected when you select 'Mark as template.'

**Context panel** — Specifies this panel is a context panel that automatically appears when you select an item, modifier, quick combo, or quick combo component from another panel or from the guest check window. **Required Options:** **1)** You must select 'Display Context Panels' in Maintenance > Business > Additional Features > Corporate Owner tab > 'Options to display' group bar, and then log back in, to enable options related to context panels. **2)** You must select 'Uses context panels' in Maintenance > Business > Store > Store Settings tab > User Interface group > 'POS Order Entry Check' group bar to activate the context panels functionality. **Related Options:** **1)** To associate a context panel to an item, select a context panel from the 'Context Sensitive Panel' drop-down list in Maintenance > Menu > Items > Display Options tab > 'Context Panel' group bar for the appropriate item. **2)** To associate a context panel to a modifier, select a context panel from the 'Display context panel'



drop-down list in Maintenance > Menu > Items > Display Options tab > 'Context Panel' group bar and select 'Display context panel' in Maintenance > Menu > Items > Modifier tab > 'If used as modifier' group bar for the appropriate item. **3)** To associate a context panel to a quick combo, select a context panel from the 'Context Panel' drop-down list in Maintenance > Payments > Promotions > Quick Combo QS tab > Quick combo QS tab. **4)** To associate a context panel to a quick combo component, select Custom context panel from the 'Context option' drop-down list and select a panel from the 'Custom panels' drop-down list in Maintenance > Payments > Promotions > Components QS > 'Components' group bar for the appropriate quick combo component.

**Use new panel display options** — Enables you to override the attributes of the skin for this panel and apply such things as a gradient, shadow, and bevel. Select True to enable, or False to disable, this feature.

**Display additional check information** — Replaces the check icon in the order queue panel with data, such as order name, check number, time check opened, and check total.

**Gradient** — Applies a smooth blending of shades from one color to another on the background panel in either a linear or radial pattern.

- **None** - Does not apply a gradient to the background of the panel.
- **Linear** - Applies the gradient from the starting point to the ending point in a straight line.
- **Radial** - Applies the gradient from the starting point to the ending point in a circular pattern.

**Gradient color** — Enables you to select a color from the color palette to apply to the gradient.

**Required Options:** You must select 'Linear' or 'Radial' from the 'Gradient' drop-down list to enable this option.

**Shadow** — Applies a visual effect with the impression the panel is raised above the objects behind it. Select True to enable, or False to disable, this feature. **Related Options:** This option enables the 'Shadow color' option.

**Shadow color** — Enables you to select a color from the color palette to apply to the shadow.

**Required Options:** You must select 'True' from the 'Shadow' drop-down list to enable this option.

**Bevel** — Adds a downward slope to the bottom right edge of the panel. Select True to enable, or False to disable, this feature.

**Outline** — Adds an outline on the edge of the panel.

**Outline color** — Specifies the color to apply to the outline of a panel. **Required Options:** You must select 'Outline' to enable this option.

**Outline width** — Specifies the width, in pixels, of the outline of a panel. **Required Options:** You must select 'Outline' to enable this option.



**Scale image** — Automatically resizes the image you add to dimensions of the panel.

**Style** — Specifies the geometrical edges of the panel.

- **Rounded rectangle** - Adds rounded corners to the rectangular shape of the panel.
- **Rectangle** - Adds four right angles to the rectangular shape of the panel.
- **Ellipse** - Adds an oval shape to the outer edge of the panel.

#### Group Bar: Identification

**Owner** — Determines who can view and maintain a panel. Each panel you create has an owner assigned. There are three owner types (Global, Corporate, and Store) and each type indicates who can view and maintain a specific panel, as well as which store location receives the panel. For example, if you want the 'Drinks' panel available at all store locations, you assign an owner whose owner type is global; however, if you want the panel to appear at a specific store only, you assign an owner for a specific store to the panel. **Related Options:** To change the owner before you create a new panel, select **Panel > New Panel Options** from the Panel Editor menu bar.

**Version Assignment** — Designates the store or store group to which the version panel is assigned. Related Requirement: This option only appears when you create a version of a panel.

**Start Date** — Indicates the first day you want the version panel active at the store. **Note:** This option appears for scheduled versions only.

**End Date** — Indicates the last day you want the version panel active at the store. **Note:** This option appears for scheduled versions only.

**Number** — Indicates the unique six-digit number that identifies the panel. This option is available for non-versioned panels only. After you save a panel, you cannot change the number assigned to the panel. If you want the system to assign a unique number, click the **ellipses button (...)** and the Number Assignment dialog box appears. Select one of the following options:

- Select **Next unassigned number** to start with the last number assigned to a panel in the database, and search for the next available number to assign.
- Select **First unassigned number** to start with the first number assigned to a panel in the database, and search for the next available number to assign.
- Select **First unassigned number following 0** to start with zero (0), and search for the next available number in the database to assign.
- Select **This number** to use the number you type for this option. If you want to specify a number, use the 'View already assigned numbers' view list to quickly see the numbers already in use.

**Name** — Designates a unique name for the panel, according to the function it performs. You can enter up to 40 characters. This option is available for non-versioned panels only.



**Description** — Enables you to provide a brief description of the panel and its use. You can enter up to 50 characters.

#### Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the panel. You can change the numbers for this property to move the panel, as needed.

**X** — Indicates the X (horizontal) coordinate for the panel. Change this number to move the panel left or right.

**Y** — Indicates the Y (vertical) coordinate for the panel. Change this number to move the panel up or down.

**Size** — Indicates the width and height of the panel. You can change the numbers for this property to resize the panel, as needed.

**Width** — Indicates the width of the panel.

**Height** — Indicates the height of the panel.

#### Group Bar: Review Order Settings

**Base Position** — Indicates the behavior of determining which check to display in the review order panel, based on the following options and the value defined in the 'Offset' option.

- **Current Order** - Specifies the order displayed in the review check panel is based on the current or active check in the queue order. When you select any other check as active, the orders displayed in the review check panel(s) change to the orders that follow the current check's numbering sequence.
- **First Open Order** - Specifies the order displayed in the review check panel is based on the first open check in the queue order.
- **Last Open Order** - Specifies the order displayed in the review check panel is based on the last open check or the most recent order in the queue order.
- **The First Open and Sent Check** - Displays the earliest open check sent to the kitchen in the review check window. If cleared, the most recent closed check appears. **Related Options:** This option disables the 'This review check should display \_\_\_ behind' option.

**Offset** — Specifies the number of orders in the queue to display in the review check, based on the selection of the following options. This number can be a positive number to decrement DOWN the queue, or a negative number to increment UP the queue. To configure this, observe the operation and ordering methods, such as the number of car lengths from the speaker to the takeout window, or the average number of guests waiting while an order is being prepared.



**Enable Scroll Buttons** — Enables or disables scroll bars on the FOH Review Check panel. Select 'True' to enable scroll bars or 'False' to not display scroll bars. **Documented Version:** 7.0.

**Display Modifiers** — Displays modifiers on the FOH Review Check panel. Select 'True' to display modifiers or 'False' to not display modifiers. **Documented Version:** 7.0.

**Display Payment Information** — Displays review check payment information in the same way as the order entry check. **Documented Version:** 7.0.

**Recall Check on Select** — Allows you to touch anywhere on the Review Check panel to recall a check. Select 'True' to enable this feature or 'False' to not allow Review Check panel 'touch' functionality. **Documented Version:** 7.0.

## Button window properties

The following descriptions apply to the properties available for a button, in Panel Editor:

### Group Bar: Appearance

**Text** — Designates the text used as the button name. The width of the panel should be considered when selecting a name. The size of the button affects how a name appears on a button. The text is centered on the button and you can type '\n' between words to make the text that follows the '\n' appear on a second line. For example, type 'Hot\nTamale' to have 'Hot' appear on the first line and 'Tamale' appear on the second line of a button. The Text property can be up to 40 characters.

**Text Alignment** — Specifies the positioning of the text on the button, using a graphical display.

**Font** — Specifies the pre-defined character styles for the text of the button. Select from Custom, Very Large, Large, Medium, Small, Very Small, Title Bar, Title Panel, and Panel Button.

**Custom Font** — Enables you to specify a unique character style for the text on the button. Click the **ellipses button (...)** to select a font. This property is available when you select a custom font. You can add additional characteristics for the font. **Required Options:** You must select 'Custom' from the 'Font' drop-down list to enable this option.

- **Name** - Specifies the name of the font.
- **Size** - Specifies the size of the font.
- **Unit** - Determines the unit measure to use for the custom font. Select from World, Pixel, Point, Inch, Document, and Millimeter.
- **Bold** - Directs the font to appear in bold text.
- **GdiCharSet** - Used with fonts with a specific character set, such as a codepage other than the system CP\_ACP.
- **GdiVerticalFont** - Used with fonts, in a vertical alignment, with a specific character set, such as a codepage other than the system CP\_ACP.
- **Italic** - Directs the font to appear in italic text.



- **Strikeout** - Includes a line across the text, usually indicating the text was considered but then later crossed out.
- **Underline** - Includes a line under the text.

**Text Color** — Applies a color to the text of the button.

- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list
- **Custom** - Uses a custom color for the text of the button. **Related Options:** This option enables the 'Custom Title Color' option.

**Custom Text Color** — Enables you to select a color from the color palette to apply to the text of the button. **Required Options:** You must select 'Custom' from the 'Text Color' drop-down list to enable this option.

**Background Color** — Applies a color to the background of the button. Select from Custom and Skin.

- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list
- **Custom** - Uses a custom color for the background of the button. **Related Options:** This option enables the 'Custom Background Color' option.

**Custom Background Color** — Enables you to select a color from the color palette to apply to the background of the button. **Required Options:** You must select 'Custom' from the 'Background Color' drop-down list to enable this option.

**Highlight** — Applies a color to the button to indicate it is in the "pressed" position on the FOH.

- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list.
- **Custom** - Uses a custom color to indicate the button has been pressed in the FOH. **Related Options:** This option enables the 'Custom Highlight Color' option.

**Custom Highlight Color** — Enables you to select a color from the color palette to indicate the button has been pressed in the FOH. **Required Options:** You must select 'Custom' from the 'Highlight' drop-down list to enable this option.



**Image** — Enables you to add an graphic to the background of a button. Additional properties appear when you select Custom.

- **Custom** - Uses a custom image for the background of the button. **Related Options:** This option enables the 'Custom Image' option.
- **Information** - Inserts a lowercase letter 'i' for the background of the button, indication the concept of information.
- **Alert** - Inserts an exclamation mark inside a triangle for the background of the button. **Related Requirements:** You must enable the Alerts feature to use this feature.
- **Error** - Inserts a stop sign for the background of the button.
- **Scroll up** - Inserts an upward arch for the background of the button.
- **Scroll page up** - Inserts an upward arch and curve for the background of the button.
- **Scroll down** - Inserts a downward arch for the background of the button.
- **Scroll page down** - Inserts a downward arch and curve for the background of the button.
- **Scroll left** - Inserts a leftward arch for the background of the button.
- **Scroll right** - Inserts a rightward arch for the background of the button.
- **Enter** - Inserts a leftward broken arrow for the background of the button.
- **Backspace** - Inserts a leftward arrow for the background of the button.

**Custom Image** — Uses a unique image to add to the panel background. Click the drop-down list to select an image. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Image Layout** — Allows you to choose the positioning of the image to the background of the panel, using a graphical display.

**Transparent Image** — Displays the background of the panel as the same color or image of the screen in which the panel resides, creating a 3-D effect. This effect is useful when a color is defined or when bitmaps are attached to the screen in Screen Editor. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Display Text** — Indicates you want text to appear on the button.

**Use new panel display options** — Enables you to override the attributes of the skin for this button and apply such things as a gradient, shadow, and bevel. Select True to enable, or False to disable, this feature.



**Gradient** — Applies a smooth blending of shades from one color to another on the background button in either a linear or radial pattern.

- **None** - Does not apply a gradient to the background of the button.
- **Linear** - Applies the gradient from the starting point to the ending point in a straight line.
- **Radial** - Applies the gradient from the starting point to the ending point in a circular pattern.

**Gradient color** — Enables you to select a color from the color palette to apply to the gradient.

**Required Options:** You must select 'Linear' or 'Radial' from the 'Gradient' drop-down list to enable this option.

**Shadow** — Applies a visual effect with the impression the button is raised above the objects behind it. Select True to enable, or False to disable, this feature. **Related Options:** This option enables the 'Shadow color' option.

**Shadow color** — Enables you to select a color from the color palette to apply to the shadow.

**Required Options:** You must select 'True' from the 'Shadow' drop-down list to enable this option.

**Bevel** — Adds a downward slope to the bottom right edge of the button. Select True to enable, or False to disable, this feature.

**Outline** — Adds an outline on the edge of the button.

**Outline color** — Specifies the color to apply to the outline of a button. **Required Options:** You must select 'Outline' to enable this option.

**Outline width** — Specifies the width, in pixels, of the outline of a button. **Required Options:** You must select 'Outline' to enable this option.

**Scale image** — Automatically resizes the image you add to dimensions of the button.

**Style** — Specifies the geometrical edges of the panel.

- **Rounded rectangle** - Adds rounded corners to the rectangular shape of the button.
- **Rectangle** - Adds four right angles to the rectangular shape of the button.
- **Ellipse** - Adds an oval shape to the outer edge of the button.

**Tag** — Enables you to assign the selected button to a specific button, or tag group. When a button is assigned to a tag group, you can easily activate and deactivate multiple buttons at one time using the Activate Panel Button event in the Event Schedule function. Set up an Activate Panel Button event to activate a specific Tag, and all buttons assigned to that tag group are activated, no matter on what panel they reside. It is important to note that you must assign buttons to a specific tag group before you can utilize the Activate Panel Button event feature; therefore, it's best if you assign a button to a



tag, when you first add the button to a panel. **Related Requirements: 1)** You set up Tags under Maintenance > System Settings > Tags. **2)** You set up an 'Activate Panel Button' event under Maintenance > System Settings > Event Schedules.

### Group Bar: Function

**Action** — Defines the action or function of the button. The action assigned to a button determines the behavior of the button and what happens on the POS terminal when an employee touches the button. Every new button has a button action of 'None' assigned, by default. Certain button functions require you to complete additional properties or access additional dialog boxes to properly configure the button. See "Appendix B: Button function descriptions" for a definition of each button function.

### Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the button. You can change the numbers for this property to move the button, as needed.

**X** — Indicates the X (horizontal) coordinate for the button. Change this number to move the button left or right.

**Y** — Indicates the Y (vertical) coordinate for the button. Change this number to move the button up or down.

**Size** — Indicates the width and height of the button. You can change the numbers for this property to resize the button, as needed.

**Width** — Indicates the width of the button.

**Height** — Indicates the height of the button.

## Image window properties

The following descriptions apply to the properties available for a bitmap image, in Panel Editor:

### Group Bar: Appearance

**Image** — Enables you to add an image as a button. Additional properties appear when you select Custom.

- **Custom** - Uses a custom image for the background of the button. **Related Options:** This option enables the 'Custom Image' option.
- **Information** - Inserts a lowercase letter 'i' for the background of the button, indication the concept of information.
- **Alert** - Inserts an exclamation mark inside a triangle for the background of the button. **Related Requirements:** You must enable the Alerts feature to use this feature.
- **Error** - Inserts a stop sign for the background of the button.



- **Scroll up** - Inserts an upward arch for the background of the button.
- **Scroll page up** - Inserts an upward arch and curve for the background of the button.
- **Scroll down** - Inserts a downward arch for the background of the button.
- **Scroll page down** - Inserts a downward arch and curve for the background of the button.
- **Scroll left** - Inserts a leftward arch for the background of the button.
- **Scroll right** - Inserts a rightward arch for the background of the button.
- **Enter** - Inserts a leftward broken arrow for the background of the button.
- **Backspace** - Inserts a leftward arrow for the background of the button.

**Custom Image** — Uses a unique image to add as a button. Click the drop-down list to select an image. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Transparent Image** — Displays the background of the image as the same color or image of the panel in which the button resides, creating a 3-D effect. This effect is useful when a color is defined or when bitmaps are attached to the screen in Screen Editor. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

#### Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the bitmap image. You can change the numbers for this property to move the image, as needed.

**X** — Indicates the X (horizontal) coordinate for the image. Change this number to move the image left or right.

**Y** — Indicates the Y (vertical) coordinate for the image. Change this number to move the image up or down.

**Size** — Indicates the width and height of the image. You can change the numbers for this property to resize the image, as needed.

**Width** — Indicates the width of the image.

**Height** — Indicates the height of the image.



## Button Grid window properties

The following descriptions apply to the properties available for a grid, in Panel Editor. After you define the number of buttons, you can use the other properties to further customize how the buttons inside the button grid should appear on the panel.

### Group Bar: Grid Settings

**Number of buttons** — Indicates the number of buttons you want to add to the button grid. You must specify the number of rows and columns

**Rows** — Indicates the number of rows in which to display the amount of buttons specified in 'Number of buttons.'

**Columns** — Indicates the number of columns in which to display the amount of buttons specified in 'Number of buttons.'

**Horizontal spacing** — Indicates how much space (in pixels) to include between each button inside the button grid.

**Vertical spacing** — Indicates how much space (in pixels) to include above and below each button inside the button grid.

**Button width** — Indicates the exact width (pixels) of each button inside the button grid.

**Button height** — Indicates the exact height (pixels) of each button inside the button grid.

**Border width** — Indicates how wide of an invisible border to place around the buttons inside the button grid.

**Aspect ratio** — Indicates the displayed width of each button, divided by its height. The aspect ratio is used to auto-calculate the number of rows, when only the 'Number of buttons' option is defined.

### Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the button grid. You can change the numbers for this property to move the button grid, as needed.

**X** — Indicates the X (horizontal) coordinate for the button grid. Change this number to move the grid left or right.

**Y** — Indicates the Y (vertical) coordinate for the button grid. Change this number to move the grid up or down.

**Size** — Indicates the width and height of the grid. You can change the numbers for this property to resize the grid, as needed.



## Appendix B: Button function descriptions

Appendix B provides a description for each action you can assign to a button, in Panel Editor. The button functions are listed in alphabetical order:

**Add Break** — Opens the FOH 'Select Employee to Add Break' screen to allow you to add a break from the FOH.

**Add Check** — Enables you to add a new separate check to an order.

**Adjust Tender** — Enables adjustments to the tender information for a guest check. If the check is already closed, you must recall and reopen the check and display it on the screen before you can make an adjustment.

**Adjust Tips** — Enables adjustments to tip information for a guest check. This is typically used for guest checks paid with a credit card. If the check is already closed, you must recall and reopen the check and display it on the screen before you can make an adjustment.

**Advance Orders** — Displays the FOH Enter Advance Order screen, which allows you to enter guest information and add an order for delivery at a later time.

**Alerts** — Enables you to view pending alerts (i.e. overtime alerts, break alerts, etc.).



### Reference

Refer to the [Alerts Feature Focus Guide - HKS334](#) for more information on configuring and using alerts.

**Allow Clock-In** — Enables an employee who is not scheduled to work or who already clocked-out, to clock-in again, if their job code has the 'Shift required to clock in/out' check box selected. Allow Clock-In also overrides labor scheduling constraints, if that program is in use.

**Allow Clock-Out** — Allows you to clock an employee out before they are scheduled to clock out. Allow Clock-Out also overrides labor scheduling constraints, if that program is in use.

**Alternate Language GC Receipt** — Enables you to toggle between English and French, when printing and reprinting the guest check or receipt. An identifier appears in the upper right corner of the button: E for English or F for French.

Default language — Indicates the language chosen to print for the gift card receipt each time you start a new check.

### To add an Alternative Language GC Receipt button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Alternate GC Receipt** from the 'Action' drop-down list.



3. Select the **language** you want in effect each time you start a new check from the 'Default language' drop-down list.

**Assign Day Part** — Enables the employee to change the current day part and opens the FOH Select Day Part screen.

**Assign Drawer** — Enables the employee to self-assign a cash drawer and opens the FOH Select Drawer screen.

**Assign Driver** — Opens the FOH Assign Driver screen with a list of the available drivers that may be assigned to an order. This option is only used with Aloha Delivery/Frequent Buyer.

**Assign Pen IDs** — Opens the FOH Assign Pen ID screen and enables the employee to associate their employee number with the Pen ID used at log in. This option is only used with Pen IDs.

**Auto-Detect Credit Card** — Enables the system to prompt the employee with the Enter Card Information screen. We recommend you include the Auto-Detect CC button function inside a scripted button so that fewer button touches are required.

**Automation Script** — Enables the system to call or start a VB script from a POS terminal. This function calls a one script file with an extension of .vbs and the files should be kept in a new \Aloha\Scripts directory. The \Scripts directory must reside on the POS terminals and be synchronized with the other updated directories from the file server. An additional option appears when you select the Automation Script button function.

Script To Run — Specifies the command line of the automation script file you want to run.

#### **To add an Automation Script button:**

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Automation Script** from the 'Action' drop-down list.
3. Select the **script file** you want to run from the 'Script To Run' drop-down list.

**Break** — Opens the FOH Clock-Out screen to enable an employee to select a paid or unpaid break.

**Break In/Out** — Opens the FOH Enter Employee Number screen to enable an employee to check in or out from a break, even though another employee is assigned to the terminal or drawer.

**Bump Delivery Order** — Bumps to the next order in the queue. This function works in conjunction with Delivery.

**Bump Video Order** — Bumps to the next order in the cell. This function works in conjunction with video display systems.



**Calibrate** — Realigns the pressure point on the POS terminal to coincide with the panel button. Correct calibration enables the system to apply pressure to the exact area of screen your finger touches, when you use a touch screen terminal.

**Chain** — Links to one or more panels on a screen. For example, restaurants typically use a chain button to link from the Order panel to the Payment panel. When a cashier completes an order, they press a chain button that opens the Payment panel to apply payment and close the order. You can also use the Chain button function as a Back button to return you to a previous panel, or as a Navigation button that takes you to an entirely new screen (when you chain the button to multiple panels). Additional options appear when you select the Chain button function.

Panels to display — Specifies the panel(s) to which the current button links. You must click the ellipses button (...) to select one or more panels on the Panel Selection dialog box.

Use graphical modifier image — Associates an image with the chain button function. The image appears on the chain button when it chains to a panel on which there are applied modifiers for the active item in the guest check. For example, you associate a check mark with the Condiments chain button. Enter a cheeseburger on the guest check and then touch Condiments to add extra pickles. A check mark appears on the Condiments button to indicate there are applied modifiers on the Condiments panel. When used in a script, you must list the chain button function as the first action in the script for this enhancement to work. **Required Options:** You must select 'Chain' from the 'Function' drop-down list to enable this option. **Documented Version:** 12.1.

Use graphical modifier color — Stipulates you want to designate a color to display on the chain button when it chains to a panel on which there are applied modifiers for the active item in the guest check. When used in a script, you must list the chain button function as the first action in the script for this enhancement to work. **Required Options:** You must select 'Chain' from the 'Function' drop-down list to enable this option. **Related Options:** This option enables the 'Custom graphical modifier color' option. **Documented Version:** 12.1.

Custom graphical modifier color — Associates a color with the chain button function. The color appears on the chain button when it chains to a panel on which there are applied modifiers for the active item in the guest check. For example, you associate the color green with the Condiments chain button. Enter a Cheeseburger on the guest check and then touch Condiments to add extra pickles. The color green appears on the Condiments button to indicate there are applied modifiers on the Condiments panel. When used in a script, you must list the chain button function as the first action in the script for this enhancement to work. **Required Options:** You must select 'Use graphical modifier color' to enable this option. **Documented Version:** 12.1.



### To add a Chain button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Chain** from the 'Action' drop-down list.
3. Click **Panels to display**, then click the **ellipses button (...)**. The Select Panels dialog box appears.

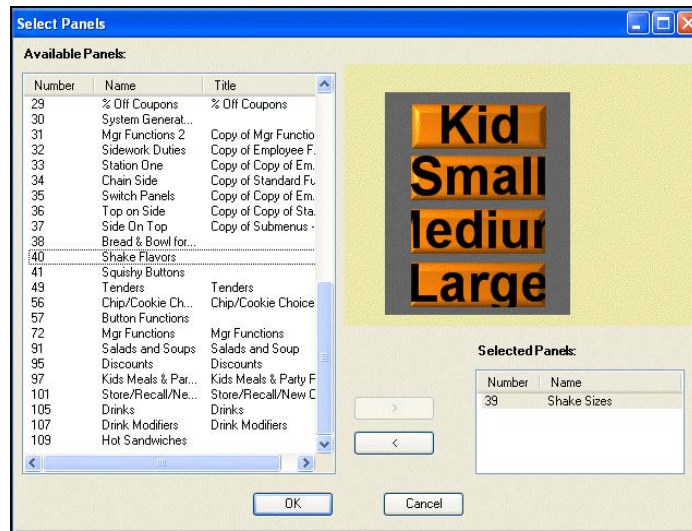


Figure 52 Select Panel Dialog Box



#### Tip

You can create a Chain button that navigates you to a single panel, or a group of panels.

4. Select the **panel** for the system to open when this button is touched on the POS terminal and click the **greater than sign (>)**. A thumbnail image of the panel you select, as well as the panel number and name, appear on the right side of the Select Panel dialog box.



#### Tip

To remove a panel within a chain function, select the panel you do not want from the 'Selected Panels' list box and click the less than sign (<).

5. Click **OK**. The selected panel name appears in the Button Properties dialog box.
6. Select an **image** from the 'Use graphical modifier image' drop-down list, if needed.
7. Select '**Use graphical modifier color,**' if needed. An additional option appears.
8. Click '**Custom graphical modifier color**' and then click the drop-down arrow to select a **color** from the color palette.
9. Select **Panel > Save Panel**.



**Change Password** — Opens the FOH Change Password screen to enable an employee to change their password.

**Change Seat Name** — Enables you to change the name of a sub-order.

**Change Size** — Changes the item and modifiers associated with the item, as defined as a size group in Maintenance > Menu > Size Groups. For example, you can change a small sandwich and the corresponding small portion ingredients defined as modifiers, to a large sandwich with large portion ingredients with one button selection. Additional options appear when you select the Change Size button function.

Method — Indicates if you want to increment size, decrement size, or define a specific size to use for the Change Size button.

- Select 'Increment Size' to increase the item size to the next level according to the hierarchy of the size group. For example, a 12 oz. can soft drink (Item 1) increments to the next size group level of a 16 oz. can soft drink (Item 2).
- Select 'Decrement Size' to decrease the item size to the next level according to the hierarchy of the size group. For example, a large pizza (Item 1) decreases to the next size group level of a medium pizza (Item 2).
- Select 'Specific Size' to display the 'Specific Size' text box into which you indicate the exact size group level to use when you want to change the size of an item associated with a size group, in the 'Specific Size' text box.

**To add a Change Size button:**

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Change Size** from the 'Action' drop-down list.
3. Select a method to use for the function.
4. If you select 'Specific Size,' select a size group level.

**Check Information** — Opens the Check Information screen on the POS terminal and prompts you to add additional information that is saved to a defined text file in \Data. This function enables you to capture a single line of information for marketing, frequent dining, or other purposes. Information a cashier enters on the POS terminal does not appear on any receipts; instead, the system stores the data directly to the \Data file. An additional option appears when you select the Check Information button function.

Prompt — Indicates the text message that appears when the cashier presses the Check Information button on the POS terminal. For example, if your restaurant wants to collect zip code information, you can type "Enter Guest Zip Code."



### To add a Check Information button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Check Information** from the 'Action' drop-down list.
3. Type the text you want to appear on the screen.

**Checkout** — Opens the “Are you sure you want to check out?” screen, which enables you to run the checkout process. Additional options appear when you select the Checkout button function.

Automatically print checkout — Indicates you want to print the checkout report automatically when the employee completes the checkout process. The default is 'False.'

Automatically open drawer — Indicates you want to open the cash drawer automatically when the employee completes the checkout process. The default is 'False.'

### To add a Checkout button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Checkout** from the 'Action' drop-down list.
3. Select Automatically print checkout if you want to print the checkout report upon checkout.
4. Select Automatically open drawer if you want the drawer to open upon checkout.

**Clear** — Clears all unordered items from the current check.

**Clear Modifiers** — Removes all modifiers added to an unordered item and reverts the menu item back to a single-entry state. Use this button function when you have a large number of modifiers added to an item and you want to remove them. You cannot use this function within a script.

**Clear Password** — Clears the password for the employee you select from the FOH Select Employee to Clear Password screen. The next time the employee logs in to the POS terminal, a message appears indicating their password was cleared. The employee can use the Change Password button function to assign a new password.

**Clock In/Out** — Opens the FOH Enter Employee Number screen to enable an employee to clock in or out, even though another employee is assigned to the terminal. An employee must perform a checkout, if applicable, before they can clock out.

**Clock Out** — Enables you to clock out of the system. An employee must perform a checkout, if applicable, before they can clock out. An additional option appears when you select the Clock Out button function:

Skip Clock Out/Break Screen — Bypasses the Clock Out/Break screen. This is utilized in environments that use drawer checkouts. This option is obsolete for POS v6.5 and above. **Documented Version:** v6.2.



**Close Check** — Closes the current guest check. The Close Check function is commonly included in scripts for 'Tender' button functions. An additional option appears when you select the Close Check button function.

Show Change Due — Indicates you want the change due amount to appear on the POS terminal when an employee closes a check. The default is 'False.'

Select Checks to Close — Indicates whether to close the selected check if it does not have a balance due, or close all separates checks for an order simultaneously, only if none of them have a balance due.



**Tip**

Use the 'All' option if you are using Split Checks to provide separate checks for each guest in a large party and you send the checks to the kitchen simultaneously so that all guests in the party receive their food at the same time.

**Combine Order** — Enables an employee to combine two checks together and opens the Scan or Enter Receipt Number screen.

**Comp** — Applies the specified comp to the guest check. An additional option appears when you select the Comp button function.

Comp — Indicates the specific comp to apply to the check.

**To add a Comp button:**

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Comp** from the 'Action' drop-down list.
3. Select a **comp** from the 'Comp' drop-down list.

**Count** — Allows you to add or remove a modifier item from a menu item based on the remaining options in the 'Function' group bar.

Count type — Stipulates whether the button applies the count of the modifier item to the menu item, clears the count of the modifier item from the menu item, or displays the current count of the modifier item on the modifier panel.

- Select 'Apply count' to apply the next modifier item you select to the menu item using the number stipulated for this button in 'Count.' For example, for the '10 Wings' menu item, if you touch a button defined with a 'Count' of 5 and then touch the 'Hot' modifier item, the system indicates the



customer wants five of the ten wings modified with the 'Hot' modifier item. **Related Options:** This option enables the 'Count' and 'Append' options.

- Select 'Clear current count' to reset the current count of the modifier item back to 0 (blank).
- Select 'Display current count' to display the currently selected count of the modifier item on the modifier panel. If the count is zero, the button is blank.

**Count** — Provides a method by which you enter a specific quantity for a modifier item. Specify the quantity, from 1 to 999, of the modifier item to apply when you touch this button. **Required Options:** You must select 'Apply count' from the 'Count' drop-down list to enable this option.

**Append** — Enables you to enter a quantity greater than nine for a modifier item by appending each number to the end of the prior number. For example, you can enter a quantity of 12 for a modifier item by touching the 1 and then the 2 count buttons before touching the modifier item. **Required Options:** You must select 'Apply count' from 'Count type' to enable this option.

**Custom Activity** — Enables you to communicate with an externally integrated software package through COM interface. An additional option appears when you select the Custom Activity Interface button function.

**Custom Text** — Specifies the text to send to the external application.

#### To add a Custom Activity button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Custom Activity** from the 'Action' drop-down list.
3. Type the text to send to the external application.

**Custom Report** — Enables you to add a custom report button to display the FOH Select Report screen on the FOH. **Documented Version:** v7.0.

**Select Employees** — Allows you to select specific employees to include in the report data. If set to False, the system generates data for all employees who worked at the store during the time frame selected for the report. **Documented Version:** v7.0.

**Report definition file** — Specifies the report configuration file name (with a .cfg extension) located in the Data directory to which this button is linked. If you do not link the button to a report configuration file, the button does not generate a report. **Documented Version:** v7.0.

#### To add a Custom Report button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Custom Report** from the 'Action' drop-down list.



3. Select **True or False** from the 'Select Employees' drop-down list to enable you to select specific employees to include in report data.
4. Type the **report definition file** that links to this report button.

**Customer Information** — Opens the delivery screen to review customer information, if the Delivery/Frequent Buyer program is in use, to allow you to assign a member to the check. You can use within a script to prompt for customer information (member assignment) when the cashier enters the order and selects the order mode. **Documented Version:** v14.1. An additional option appears when you select the Customer Information button function.

Customer Information Type — Specifies the type of customer information is either Aloha Loyalty Member or Frequent Buyer. The default is 'Aloha Loyalty Member.'

**Customer Reward Report** — Prints a report with the bonuses a customer has earned, if the Delivery/Frequent Buyer program is in use. An additional option appears when you select the Customer Reward Report button function.

Report Type — Specifies if the type of customer report is Aloha Loyalty Member or Frequent Buyer. The default is 'Aloha Loyalty Member.'

**Dashboard** — Allows you to display a dashboard on demand by touching a button you configure on any panel. The system automatically adds Back and Exit buttons. Touching Back returns you to the previous screen, and Exit returns you to the floating logo or the logout screen. **Documented Version:** v14.1.

**Delete** — Behaves differently on the POS, depending on the context in which it is used. If you select nothing on the guest check, the system deletes the last unordered item on the check. If you select an unordered item on the check, only that item is deleted. If one of these scenarios affects an ordered item, it becomes a void, prompting for a void reason. An additional option appears when you select the Delete button function.

Multi-Delete Options — Specifies a specific delete option. **Previous Item** deletes the last ordered or selected item. **Previous Like Item** deletes the last ordered or selected item along with a quantity function. This function behaves the same way as ordering items in quantity. For example, if 21 cookies are selected, but 15 is the actual amount, select the quantity 6, then select a button assigned with the Delete Previous Like Items function. Six cookies are deleted and the guest check window displays 15 cookies.

**Delete All Items** — Clears all items from the guest check, as long as the items were not sent to the kitchen. If items were sent to the kitchen, the Void Reasons screen appears and you must select a reason for the void before you can delete the items. If the Void Reasons screen appears, the items are considered voided from the guest check.

**Delete Checkout** — Deletes a checkout for an employee, when you select the employee from the FOH Select the Employee's Checkout to Delete screen.



**Delete Clockout** — Deletes a clockout for an employee, when you select the employee from the FOH Select the Employee's Clockout to Delete screen.

**Delivery** — Activates the delivery screens if the Aloha Delivery/Frequent Buyer program is in use. An additional option appears when you select the Delivery button function.

Order Type — Specifies the type of order to use for delivery orders.

**Delivery Information** — Displays information regarding the delivery order, if the Delivery/Frequent Buyer program is in use.

**Disable Punctuality Control** — Enables you to disable punctuality enforcement immediately, based on a labor schedule. When you activate the Disable Punctuality Control function, the system will not check if employees are scheduled to work, or the time they are scheduled to arrive or leave work, when they clock in and out of the system. Only managers use this function, and punctuality enforcement resumes after you perform an EOD.

**Dispense Tokens** — Enables you to manually dispense gaming tokens, if your system interfaces with the Token Distribution feature.

**Display Order Total** — Displays a "Your Total is..." message on the display board screen, followed by the balance of the current check. You most likely include this function in a script with the Send button function when display boards are in use. When you press 'Send' from the POS terminal, the 'Your Total is...' message appears. The message appears if:

- You order an item on a new order.
- You add a new menu item to the current order.
- You add a comp, promo, tax exemption, or another element which affects the balance, to the current order.

The message disappears when you start a new order, or when the time set for the 'Seconds to Display Message' option expires. It does not appear when you recall an order after you start a new check. An additional option appears when you select the Display Order Total button function.

**Seconds to Display Message** — Indicates the number of seconds for the order total message to appear on the display board.

**Donate Change** — Allows the guest to donate the remaining change due to them in support of a local charity.



## Reference

Refer to the [Charitable Donations Feature Focus Guide - HKS1490](#) for more information.



**To add a Donate Change button to the charitable donations panel:**

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.
2. Select **Work with Panels**.
3. Select **Panel > Open Panel**, select the **donations panel**, and click **OK**.
4. Create a **new button**. The Properties dialog box appears.
5. Under the 'Function' group bar, select **Donate Change** from the 'Action' drop-down list.
6. Select the **donation item created earlier** from the 'Item' drop-down list.
7. Select **Change Due** as the 'Amount Type.'
8. Select **True** from the 'Display Change Due' drop-down list to display the change due amount on the button.  
-OR-  
Select **False** from the 'Display Change Due' drop-down list to hide the change due amount on the button.
9. Select **False** from the 'Ask for Amount' drop-down list to suppress the amount prompt and apply the change due with one button touch.
10. Under the 'Appearance' group bar, change the **default text** to 'Donate Change.' To display text on multiple lines, insert '\n' without spaces for line breaks. For example, 'Donate\nChange.'
11. Configure the **remaining options** as you would for any other button.
12. Continue to the **next procedure**.

**To add a predefined amount button to the charitable donations panel:**

1. With the charitable donations panel still active, right-click and select **new button**.
2. Under the 'Function' group bar, select **Donate Change** from the 'Action' drop-down list.
3. Select the **donation item created earlier** from the 'Item' drop-down list.
4. Select **Custom** as the 'Amount Type.'
5. Type a **dollar amount**, such as 1.00, in 'Default Amount.'
6. Select **False** from the 'Ask for Amount' drop-down list to suppress the amount prompt amount and prevent the entry of an amount different than the predefined value.
7. Under the 'Appearance' group bar, change the **default text** to 'Donate x' where 'x' is the dollar amount. To display text on multiple lines, insert '\n' without spaces for line breaks. For example, 'Donate\n \$1.'
8. Configure the **remaining options** as you would for any other button.
9. Repeat this **procedure** to add additional predefined amount buttons to this panel.
10. Continue to the **next procedure**.



### To add an open amount button to the charitable donations panel:

1. With the charitable donations panel still active, right-click and select **new button**.
2. Under the 'Function' group bar, select **Donate Change** from the 'Action' drop-down list.
3. Select the **donation item created earlier** from the 'Item' drop-down list.
4. Select **Custom** as the 'Amount Type.'
5. Leave the **default amount** at 0 (zero).
6. Select **True** from the 'Ask for Amount' drop-down list. The Open Item screen appears when you touch this button in the FOH, allowing you to type the amount your guest offers as a donation.
7. Under the 'Appearance' group bar, change the **default text** to 'Donate Open Amount.' To display text on multiple lines, insert '\n' without spaces for line breaks. For example, 'Donate Open\nAmount.'
8. Configure the **remaining options** as you would for any other button.
9. Select **Panel > Save All Panels**.
10. Exit the **Screen Designer** function.



#### Reference

Refer to the [Charitable Donations Feature Focus Guide - HKS1490](#) for more information.

**Drawer Checkout** — Enables you to run a drawer checkout report.

**Dynamic Comp** — Allows you to activate a comp card and enter a value for the comp card.

**Required Options:** To allow an employee to use the Dynamic Comp button to activate and enter a value for a comp card, access Maintenance > Labor > Pos Access Levels, select 'Approve Aloha Loyalty card assignment' under the 'Financial' group bar, and assign the access level to the employee.

**Documented Version:** v14.1.

### To add a Dynamic Comp button:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer** or **Table Service Designer**.
2. Select **Work with Panels**.
3. Select **Panel > Open Panel**, select a **panel**, and click **OK** (QS only) or select **Panel > Open Panel**, select a **Floorplan panel** or **Order Entry panel** to edit, and click **OK** (TS only).
4. Select an **available button** or create a **new button**. The Properties dialog box appears.
5. On the Properties dialog box, select **Script** from the 'Action' drop-down list.
6. Click **None** in Script Actions and then click the **ellipsis (...)** to display the Edit Script Actions dialog box.
7. Click **Add**.



8. Under the 'Function' group bar, select **Just-in-time Manager Approval** as the 'ActionType.' This enables 'POS Access Levels.'
9. Click the **ellipsis (...)** to display the Select POS Access Levels dialog box.
10. Select one or more **access levels** for which to provide the ability to add value to a dynamic comp card, and click **OK** to return to the Edit Script Actions dialog box.
11. Click **Add** again on the **Edit Script Actions** dialog box.
12. Under the 'Function' group bar, select **Custom Activity** as the 'Action Type.'
13. Click the **Custom Text** drop-down arrow, type **EFREQ\_DYNAMIC\_COMP** and click outside the box to exit and save the entry.
14. Click **OK**.
15. Under the 'Appearance' group bar, type a name for the button, such as 'Add Value\nGC.' To display text on multiple lines, insert '\n' without spaces for line breaks.
16. Configure the **remaining options** as you would for any other button.
17. Select **Panel > Save All Panels**.
18. Exit the **Screen Designer** function.

**Dynamic Included Modifier** — Displays a check mark on the modifiers of an item. **Required Options: 1)** You must select 'Included' for the respective dynamic modifier in Maintenance > Menu > Items > Dynamic Modifiers tab > Dynamic Modifiers group bar. **2)** You must select 'Context panel' for the respective panel in Maintenance > Screen Designer > Quick Service Screen Designer > Properties dialog box to enable this button function.

**Dynamic Substitute** — Detects if a quick combo component can be substituted for the item selected for this button, and, if yes, makes the substitution. When the entire quick combo is selected in the guest check window, the system first tries to make the substitution for the primary component, and if unsuccessful, tries to make the substitution for the other components in the quick combo, beginning from the first component and moving down to the last component. The Dynamic Substitute button function only works on a panel configured as a context panel. **Required Options:** You must select 'Context panel' for the respective panel in Maintenance > Screen Designer > Quick Service Screen Designer > Properties dialog box to enable this button function. **Documented Version:** v6.7.

**Item** — Specifies the item to substitute for the quick combo component currently present in the guest check window. If the item is not present in the 'Substitution Category' or selected as an eligible item on the Items tab in the quick combo configuration, then the system cannot make the substitution, and an error message appears. The system breaks the quick combo into a la carte pricing when the item is not in the substitution category, but is selected as a valid item in the quick combo configuration. **Documented Version:** v6.7.



**Dynamic Text** — Displays dynamic button text that is purely informational; you cannot select the button itself. The text that appears on the button changes depending on the type selected for the action. In Aloha Quick Service, you can place this button on any panel. In Aloha Table Service, you can only place this button function on a submenu panel.

**Type** — Determines the type to use for the Dynamic Text button function. Select from 'Banner Text,' 'Amount Due,' or 'Item Countdown.'

- Select 'Banner Text' to automatically change the text on the button to the name of the item, modifier, or quick combo currently selected in the on-screen guest check, or the last item on the check, if an item is not selected first. The text used on the button is a combination of the text defined in the 'Text' field on the Properties dialog box, followed by the selected element in the on-screen guest check. For example, if you type 'Modify:' in the 'Text' text box, and select the 'Melt' item in the on-screen guest check, 'Modify: Melt' appears on the button. If you select a quick combo component, the name of the associated quick combo appears, instead of the component. If you select multiple items in the 'on-screen guest check, or you have not added items to the check, no text appears on the button. If you do not select any items on the check, the name of the last entered item or quick combo appears on the button. The Banner Text button is not supported with the review check panel.
- Select 'Amount Due' to display the amount due of the transaction on the button.
- Select 'Item Countdown' to allow the button to display the number remaining to fulfill the group quota. Example: 6 remaining. The system bases the count upon the total number of items from the category that are on the check. **Related Options: 1)** You can configure item countdown buttons with different dynamic text in a single database, so the POS can monitor several different categories, such as sales, retail, and non-sales categories. **2)** Selecting 'Item Countdown' enables 'Prompt Threshold,' 'Prompt Amount,' and 'Prompt Category.'

**Prompt Threshold** — Designates the amount, up to two digits, at which to initiate Item Countdown to appear on the order entry screen. Zero is not a valid number. Once you reach the amount, the button displays the remaining amount required to fill the group quota amount. **Required Options:** You must select 'Item Countdown' in 'Type' to enable this option.

**Prompt Amount** — Designates the fulfilled group quota amount, up to two digits. Zero is not a valid number. Once you meet the prompt amount, the item countdown no longer appears, unless the guest continues the remaining group quota. The Prompt Amount number must be higher than the amount in 'Prompt Threshold.' **Required Options:** You must select 'Item Countdown' in 'Type' to enable this option.

**Prompt Category** — Designates the category for which you want the Item Countdown to perform the countdown. Every item from the prompt category counts against the prompt amount. The drop-down list displays all sales, retail, and non-sales categories for quick-service environments, and all sales, retail, non-sales, and suggestive categories for table-service environments.

**Required Options:** You must select 'Item Countdown' in 'Type' to enable this option.



**Edit Break** — Enables you to edit the break times for an employee, after you select the employee from the FOH Select the Employee to Edit Break screen.

**Edit Price Change Events** — Allows you to postpone, ignore, or immediately fire a price change event scheduled for the day, from the front-of-house. For Table Service, the system automatically adds the button to the Manager Functions > Financials screen. **Related Requirements:** To allow an employee to postpone, ignore, or immediately fire a price change event for the day, access Maintenance > Labor > Pos Access Levels, select 'Edit price change events' under the 'Financials' group bar, and assign the access level to the employee. **Documented Version:** v14.1.

**Edit Time** — Enables you to edit the clock in and out times for an employee, after you select the employee from the FOH Select the Employee to Edit Clock In Time screen.

**Eject Cash Card** — Ejects a cash card from a cash card device.

**End Of Day** — Invokes the End-of-Day process.



#### Caution

End-of-Day is usually performed as a scheduled event. If you accidentally select this button on the POS terminal, you will inadvertently start a new day of business.

**Exit** — Logs an employee out of the system and returns to the logon screen.

**Fingerprint Scanner Enroll** — Enables you to enroll fingerprints into the Aloha system, when interfacing with the Aloha Fingerprint Scanner.



#### Reference

Refer to the [Fingerprint Scanner Feature Focus Guide - HKS358](#) for more information on configuring and using a fingerprint scanner.

**Force Tender** — Enables the entry of credit card information without having to make a phone connection through the modem to receive credit card authorization. Use the Force Tender function when the file server goes down and you must tender a guest check.

**Fraction** — Enables you to specify a portion of the pizza for order entry. **Documented Version:** v6.7.

**Item** — Specifies the item that represents the portion of the whole pizza represented by this button. This option has no effect when configuring the Pizza Modifier screen. **Related Requirements:** Only items you associate with a fraction in Maintenance > Menu > Items under the 'Pizza' group bar on the Item tab appear in the list for selection. **Documented Version:** v6.7.

**Fundraiser** — Allows you to support your community by associating sales with a specific fundraiser.



**Get Check** — Opens the FOH Enter Check Number screen, enabling the employee to get an open check for tendering.

**Get Stored CC** — Allows you to retrieve credit card data stored in memory of the terminal so you can apply to a payment. **Documented Version:** v6.4.

**Gift Card Balance Query For Tender** — Allows you to perform a balance inquiry for an Aloha Stored Value gift card that does not have an ePin. Use this button function if an ePin is not present on the card, and use the existing Query Gift Card Balance button function for cards that contain an ePin. ePins increase fraud protection and require the entry of a security validation code on the Front-of-House (FOH). Select the panel on which you place your tenders. **Related Options:** This option exposes the 'Tender' option. **Documented Version:** v19.9

Tender — Specifies the Aloha Stored Value tender to use. **Required Options:** **1)** You must select 'Gift Card Balance Query for Tender' from the 'Function' drop-down list to enable this option. **2)** You must use an ASV tender that has 'Require code entry' cleared in Maintenance > Tenders > Security Verification tab. **Documented Version:** v19.9

**Gift Card Cash Out** — Provides a means for obtaining the remaining balance on a gift card and approval from a processor when a guest requests the balance back as cash, without having to open a guest check. This feature is available for the Givex processor only and requires an updated UPI plugin. **Related Options:** To allow an employee to cash out a gift card without manager approval, access Maintenance > Labor > Pos Access Levels, select 'Enable cash out from gift card' under the 'Financial' group bar, and assign the access level to the employee. **Related Requirements:** To assist with employee reporting of cash given to guests requesting the balance of a gift card in cash back, access Maintenance > System Settings > Petty Cash Account and create a paid out petty cash account specific to that gift card. **Documented Version:** v15.1.

**To add a Gift Card Cash Out button:**

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer** or **Table Service Screen Designer**.
2. Select **Work with Panels**.
3. Select **Panel > Open Panel**.
4. If using Quick Service, select a **panel** to edit, and click **OK**.
5. If using Table Service, select the **floor plan panel** or **order entry panel** to edit, and click **OK**.
6. Select an **available button** or create a **new button**. The Properties dialog box appears.
7. Under the 'Function' group bar, select **Gift Card Cash Out** from the 'Action' drop-down list.
8. Select the **gift card processor** from the drop-down list.
9. Select the **petty cash account** created for tracking the gift card cash outs from the drop-down list.



10. Under the 'Appearance' group bar, type a **name** for the button, such as 'Givex\nCash\nOut.' To display text on multiple lines, insert '\n' without spaces for line breaks.
11. Configure the **remaining options** as you would for any other button.
12. Select **Panel > Save All Panels**.
13. Exit the **Screen Designer** function.

**Highlight Quick Combo Component** — Selects a specific component of an active quick combo in the on-screen guest check. **Documented Version:** v15.1.

**Component** — Enables the system to select the associated component of the quick combo in the on-screen guest check window and the context panel associated with the item appears. For example, the first component in a quick combo is a cheeseburger, the second component is small fries, and the third component is a small soda. When the cashier touches Drinks, the system selects the small drink in the guest check window, and the context panel associated with the small drink appears, allowing the cashier to make changes. This button function replicates the existing system behavior as if the cashier selected the item directly in the on-screen guest check. **Documented Version:** v15.1. **Required Option:** You must select 'Highlight Quick Combo Component' to enable this option.

**Item Availability** — Opens the Item Availability screen into which you enter the on-hand quantity of an item or make an item unavailable.

**Item Lookup** — Opens an item lookup screen used to search all items in the database, even if they do not appear on a panel. When you touch the Item Lookup button, a list of items and a keypad appear. As you enter the item number or description, the list displays only those items that match the characters you enter. You can continue to enter characters or select an item from the list. After you select an item, the item number, item description, and price appear.

**Just-in-time Manager Approval** — Enables you to add the manager approval screen within a script to require manager access to a function. When you define the script, use the JIT Approval button function just prior to the button function for which you require manager approval, and select the access levels that can perform the function without manager approval. When you select the scripted button on a POS terminal, the system determines if the employee has sufficient access to run the next function in the script. If yes, the system continues with the next function in the script. If no, the Manager Approval screen appears. An employee with sufficient access must enter their password to con-



tinue. If the entered password is not valid, an error message appears and the screen returns to the order entry screen. An additional option appears when you select the Just-in-time Manager Approval button function.



#### Note

Since the Manager Approval function has no value as a standalone button function, you should always include it within a script, and add it before the function for which you require manager approval. Additionally, the text, background, and bitmap options on the Edit Buttons - JIT Approval dialog box do not display on the POS when you do not include the JIT Approval button in a script.

**POS Access Level** — Indicates the access levels allowed to perform the function without manager approval.

**Manage Advance Orders** — Displays the FOH Manage Advance Orders screen to allow you to view, print, and edit ordered and unordered advance orders.

**Manage Delivery Drivers** — Opens the FOH Manage Drivers screen, listing the drivers for assigning orders, if the Delivery/Frequent Buyer program is in use.

**Manage Delivery Orders** — Opens the FOH Delivery Orders screen, listing all delivery orders, if the Delivery/Frequent Buyer program is in use. An additional option appears when you select the Manage Delivery Orders button function.

**Order Type** — Specifies the type of delivery orders to appear when you touch the Manage Delivery Orders button. The default is 'All.'

**Manage Drawers** — Opens the FOH Assign Cash Drawer screen to assign cash drawers and perform cash in/cash out transactions for all available drawers.

**Manager Mode Toggle** — Allows a manager to log in and perform tasks on a FOH terminal while another employee is also logged in to the terminal. A green border appears around the user interface to indicate manager mode is in use. If you establish the maximum number of minutes allowed for the system to remain in Manager Mode without activity, the system automatically exits manager mode when the time limit expires. **Documented Version:** v15.1.

**Modifier Code** — Specifies a preceding preparation code for item modifiers, such as No, Extra, Side, etc. You must touch this button before an order modifier. An additional option appears when you select the Modifier Code button function.

**Modifier Code Type** — Selects the modifier code to apply to the next modifier item you enter.

**Modify** — Opens the FOH Modify screen for the selected menu item on the order. If no modifiers are attached to the selected menu item, the screen appears with no modifiers to select.



**Multiple Item Scanning** — Displays the Multiple Item Scanning screen, from which you are able to scan a QR code with a supported format generated from a non-integrated scale. The QR code can contain multiple items. You must scan the code while the 'Multiple Item Scanning' screen is active.

**Related Options:** You must access Maintenance > Business > Store > Store Settings > User Interface group and select 'ProCom Scale' from the 'Multiple item ordering scanning format' drop-down list.



### Reference

Refer to the Appendix in the [Scales Feature Focus Guide - HKS1480](#) for more information regarding the configuration of a non-integrated scale.

**Name Order** — Displays a qwerty typewriter keypad so that you can assign a name to an order. Some establishments use the name of the customer to keep track of an order.

Print name on the bottom of the chit — Includes the customer name in print at the bottom of the chit, rather than at the top. **Documented Version:** v7.0.

**New Order** — Opens a blank new order screen; however, you can configure the POS to automatically display a blank new order screen for a particular order entry queue without the need to touch the New Order button. This is done using the 'Auto open new order' check box located in Maintenance > System Settings > Order Entry Queue. An additional option appears when you select the New Order button function.

**Suppress Prompt** — Suppresses the "You are already on a new order" POS warning message, when you touch the New Order button while currently on a new order.

**Next Seat** — Activates the Sub-Order feature and enables you to divide a single guest check into several orders, each with the appropriate subtotals, taxes, and totals. An additional option appears when you select the Next Seat button function.

Seat Header — Specifies the text to appear on the guest check to indicate a separation between sub-orders.

Prompt for Seat Header — Indicates you want the system to prompt for the guest name for each sub-order on the guest check. **Related Options:** Selecting 'True' enables 'If initial items on the check, create.'

If initial Items on the check, create — Determines how many sub-orders to add to the current check when you touch the Next Seat button.

- Select 'Two Seats' to add two sub-orders to the current check, if in your operation, you ask for the guest name after you enter their requested items on the check and you typically require more than one sub-order per check. The system prompts you to name the first sub-order and assigns the entered items to the first sub-order. Then the system prompts you to name the second sub-order and allows you to add items to the second sub-order. If you do not require the second sub-order,



when you move to the next check, the system copies the second sub-order, along with the name, to the second check. You must add items to the copied sub-order before the system will remove the original sub-order from the first check. This is the default option.

- Select 'One Seat' to add a single sub-order to the current check, if in your operation, you normally ask for the guest name before you enter their requested items on the check. If, for some reason, you enter items on the check before you ask for the guest name, the single sub-order inherits the items already entered and you must touch another button to add another sub-order to the check. **Required Option:** You must select 'Prompt for Seat Header' to enable this option.

**None** — Designates the button is not in use at this time. You can use this button to add a title to the panel.

**Open Drawer** — Opens the cash drawer.

**Order Item** — Adds a menu item to the current order. An additional option appears when you select the Order Item button function.

Item — Indicates the menu item to add to the guest check.

**Order Modifier** — Adds a modifier item to the current order. This provides modifications to a selected menu item or to the last item ordered. Note: This does not invoke the forced system modifiers activated by the Modify function. An additional option appears when you select the Order Modifier button function.

Modifier Item — Indicates the modifier menu item to add to the guest check.



#### Note

The 'Item' and 'Modifier Item' list boxes use the same items defined in Maintenance > Menu > Items and conform to the pricing hierarchy. You can select an item for both an order item and an order modifier; however, you must place an order modifier in a modifier group and the group must be attached to the item it modifies.

**Fill remaining count** — Adds the modifier item to the menu item based on the remaining quantity of modifiers needed to fulfill the minimum required for the modifier group. For example, if the modifier group requires you to select a minimum of 10 modifiers, and you have already selected five, the system adds the selected modifier to the check using a quantity of five. If you select a count prior to selecting the modifier, the system ignores 'Fill remaining count' and adds the modifier based on the selected count.



**Order Type** — Specifies the order mode to assign to the button, as defined in Maintenance > Menu > Order Modes. You can assign a default order mode to an order queue in Maintenance > System Settings > Order Queues. Assigning this eliminates the need to select the same order type for every transaction. An additional option appears when you select the Order Type button function.

Order Mode — Specifies the order mode to assign to the customer order.

**Other Wages** — Opens the FOH Other Wages screen to allow entry of hours or a dollar amount for things such as vacation time for the current day.

**Play Video** — Activates an available.avi video clip most commonly used for training purposes. An additional option appears when you select the Play Video button function.

Video File — Indicates the specific video file to play.



### Reference

Refer to the [Clock-In Movie Feature Focus Guide - HKS344](#) for more information on configuring and using the Clock-In Movie feature.

**PLU List** — Opens a numeric keypad on the POS terminal, to enter an ID number for an item, if known, to order the item. Additional options appear when you select the PLU List button function.

Confirm Item — Adds a POS confirmation prompt asking if you want to order the item at the specified price.

Chain Open Item — Opens the FOH Open Item screen for entering a description and a price if the PLU item number is not defined in Maintenance > Menu > Items.

Open Item — Associates with the PLU list function. This works in conjunction with the 'Chain to Open Item if Not Found' check box and the list box displays a list of all items that have 'Ask for Price' selected in Maintenance > Menu > Items > Pricing tab.



### To add a PLU list button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **PLU List** from the 'Action' property drop-down list. Additional options appear.
4. If desired, select **True** from the 'Confirm Item' property drop-down list to add a POS prompt confirming you want to order the item at the specified price.
5. If desired, select **True** from the 'Chain to Open Item if Not Found' property drop-down list to open the POS Open Item screen for entering a description and a price if the PLU item number is not defined in Maintenance > Menu > Items.
6. Select an **open item** from the 'OpenItem' property drop-down list, to attach to the PLU list function. This works in conjunction with the 'Chain to Open Item if Not Found' property. The drop-down list displays items with 'Open Item' selected in Maintenance > Menu > Items.

**PMS Inquire** — Enables inquiries about the status of a guest, to determine whether the guest is registered at the hotel and has the authority to charge orders to his or her room. This option works in conjunction with the PMS Interface product.



#### Reference

Refer to the Aloha PMS Integration Guide for more information on configuring and using the PMS interface.

**Print Checkout** — Prints the employee checkout report. An additional option appears when you select the Print Checkout button function.

Allow Any Checkout — Indicates you allow any checkout to print; both open or closed.

**Print GST Tax Invoice** — Prints the guest check as a GST tax invoice if a GST tax is defined in the system. If the guest check total is less than the amount entered in the Amount text box located in Store Settings, the guest check is automatically reprinted with the title 'Tax Invoice.' If the guest check total is equal to or greater than the amount entered in the Amount text box, the Special Message screen appears and enables you to enter the customer information to print on the tax invoice.

**Print Item Availability** — Prints the Item Availability slip.

**Print Message** — Enables the system to print a 'general message' type configured in Print Designer from the front-of-house. Use as a standalone to print the message on demand, or in conjunction with a script when using Campaign Rulebook. **Documented Version:** v14.1.



**Print Receipt** — Prints a receipt for the current order. An additional option appears when you select the Print Receipt button function:

Print Receipt Option — Specifies whether to print the current guest check or separate receipts for all guests in a party. Select 'Selected (Single)' to configure the button to print the current check appearing in the guest check window only. If using split checks, you can use this button function to print a separate receipt for each guest in a party as you progress through the order. Select 'All' to configure the button to print a separate receipt for all guests in a party with one button touch, after you enter the entire order.

**Promo** — Applies the specified promotion to the guest check. **Note:** If manager access is required, the system displays a password keypad. An additional option appears when you select the Promo button function.

Promo Types — Specifies the promotion to apply, when you touch this button.

**Promo Lookup** — Enables you to select a promo to apply to the guest check. Only promotions that are 'Active,' meet the start and end date criteria, and do not have 'Do Not Show in Promo List' selected in the Promotions dialog box appear for selection. Additional options appear when you select the Promo Lookup button function. **Documented Version:** v6.2.

Use Quick Lookup Screen — Enables you to enter search criteria using an alphanumeric keyboard, to select an active promotion to apply to the guest check. If cleared, the list of promotions appear on continuing pages.

Display eligible Promos only — Displays only promotions that are eligible for the items on the check on the FOH Promo Lookup screen. If set to False, the screen lists all defined active promotions. **Required Options:** You must select 'Promo Lookup' from the 'Action' drop-down list to enable this option.



**Quantity** — Applies a multiplier to a selected item or the last item ordered, according to the number entered in the 'Quantity' text box. Additional options appear when you select the Quantity button function.

Quantity — Specifies the quantity multiplier for the quantity button. If you enter zero (0), a POS numeric keypad appears and prompts for a quantity.

Append — Enables you to enter a quantity greater than nine by appending each number to the end of the prior number. For example, when you select this option, you can ring up 12 burgers on the POS terminal by touching 1 and 2 on the Quantity panel before you order the burger menu item.

Method When Used With Modifiers — Determines how modifiers display when using the quantity button.

- Select 'Full quantity per item' to allow the input of a quantity followed by the selection of a modifier of an item to consolidate the modifiers onto a single line on guest checks and kitchen video display boards. For example, if a customer requests three creamers to go with a large coffee, the cashier touches the quantity button, enters the quantity, and then the modifier. The guest check and kitchen video display board show the order as 'LG Coffee,' and directly underneath '3 creamers.' **Related Options:** Select 'Consolidate quantity ordered modifiers' under the 'POS Order Entry Check' group bar in the User Interface group on the Store Settings tab in Maintenance > Business > Store.
- Select 'One per item' to allow the input of a quantity, followed by the selection of a modifier of an item, to distribute the modifiers among all eligible items singularly on guest checks and kitchen video display boards. For example, a family orders three coffees to go, and each guest wants one creamer. The cashier touches the quantity button and then selects three as a quantity. The guest check and kitchen video display board show each coffee with its own corresponding creamer; 'LG Coffee,' 'Creamer,' 'LG Coffee,' 'Creamer,' and 'LG Coffee,' 'Creamer.'

The Quantity button enables you to order multiples of an item with the press of a single button. The system applies a multiplier to a selected item or the last item ordered, according to the number entered in the 'Quantity' text box. Additionally, when you select the 'Append' property, the button enables you to enter double-digit quantities. For example, to order 12 burgers, touch buttons 1 and 2. A quantity panel, which is usually created as a vertical or horizontal bar, should be part of the default screen.

#### **To add a Quantity button:**

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Quantity** from the 'Action' property drop-down list. Additional options appear.



4. Click the **left column** of the 'Quantity' property and in the right column, type the quantity multiplier for the button. This option has a valid range of 0-9. If you type zero (0), the POS terminal displays a numeric keypad and prompts for a quantity.
5. Select **True** from the 'Append' property drop-down list, to enhance the function with the ability to select double-digit entries.



#### Note

If you do not want the system to prompt for the quantity using the numeric keypad, you must create a different button for each quantity you want available on the POS terminal.

**Quebec Fiscal Printing** — Enables you to create the buttons necessary for meeting Revenu Quebec fiscal requirements. Using this button function, you can create the buttons necessary for entering a package deal, a group event, or printing a duplicate copy of a guest check for your records. **Documented Version:** v12.3.

**Package Deal** — Required for entering the sale of a package deal into the system. A sale is considered a package deal when you include a meal with a service, such as in a dinner theatre. The Package Deal button sends an identifier indicating the sale is a package deal to the sales recording module (SRM). You must also access Maintenance > Payments> Promotions and create a comp that discounts the package deal 100%. **Documented Version:** v12.3.

**Group Event** — Required for entering the sale of a group event into the system. A sale is considered a group event when you provide meals to a group of people under a written and signed agreement with the customer, such as for a wedding reception or banquet. The Group Event button sends an identifier indicating the sale is a group event to the sales recording module (SRM). You must also access Maintenance > Menu > Items and create a zero-priced (item with a price of \$0.00) to associate with the occasion. This is necessary because the POS system requires you to add at least one item to the guest check before you can close the check. **Documented Version:** v12.3.

**Duplicate Guest Check** — Provides the ability to print a duplicate copy of the guest check for the merchant to retain. **Documented Version:** v12.3.



#### Reference

Refer to the [Revenu Quebec Fiscal Requirements Feature Focus Guide - HKS378](#) for more information.

**Query Cash Card Balance** — Queries the remaining balance on a cash card. The balance of the card prints to the local receipt printer and does not appear on the POS screen.



**Query EBT Card Balance** — Enables you to connect with the host and query the remaining balance of an electronic benefits transfer (EBT) card. The balance of the card prints to the local receipt printer and does not display on the FOH screen. Select from 'Cash Benefits' or 'Food Stamps' to specify the EBT tender type to query.

Food Stamps — Specifies this EBT card balance queries the host to check the available amount on a SNAP benefits card.

Cash Benefits — Specifies this EBT card balance queries the host to check the available amount on a Cash Benefits card.

**Query Gift Card Balance** — Connects with the gift card host and queries the remaining balance of a gift card. The balance of the card prints to the local receipt printer and does not appear on the POS screen. Use this button function if the gift card requires the entry of an ePin in the FOH. For Table Service, you must add this button to a customized panel on the Order Entry screen or a Floor Plan in use. Refer to the Gift Card Balance Query For Tender button function for gift cards where an ePin is not present on the card.



#### Reference

Refer to the [Customized TS Order Entry Screen Feature Focus Guide - HKS349](#) for more information on how to create a custom panel.

**Quick Combo** — Applies a Quick Combo promotion to the guest check. The Quick Combo is defined in Maintenance > Payments > Promotions. Additional options appear when you select the Quick Combo button function.

Quick Combo Promo — Indicates the specific quick combo promotion to apply to the check.

Components — Indicates the menu item components to associate with the specific promotion. You must click the **ellipses button (...)** to assign the components on the Select Quick Combo Components dialog box.

The Quick Combo button enables you to apply a Quick Combo promotion to a guest check. The Quick Combo is defined in Maintenance > Payments > Promotions.

#### To add a Quick Combo button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. **Select Quick Combo** from the 'Action' property drop-down list. Additional options appear.
4. Select the **quick combo promotion** to assign to the button from the 'Promotion' property drop-down list.



- Click the **left column** of the 'Components' property, then click the **ellipses button (...)**. The Select Quick Combo Components dialog box appears.

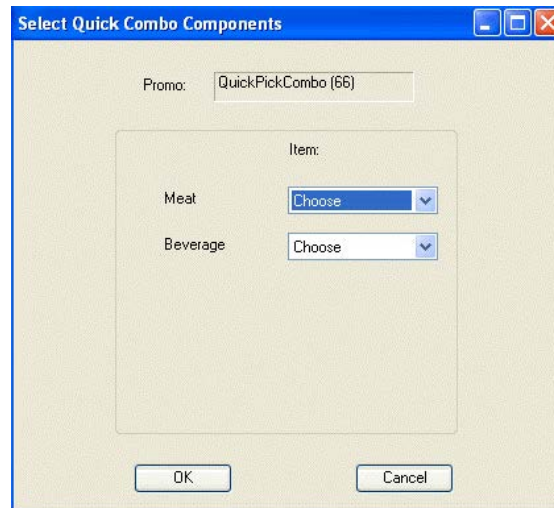


Figure 53 Quick Combo Components

Menu items that are associated to the selected combo appear in the dialog box. **Tip:** You associate items in Maintenance > Payments > Promo.

- For the first item in the Component column, select the **default item** to order when a guest purchases the Quick Combo from the 'Item' drop-down list. Use this option when you do not give the guest a choice, such as in the case of a sandwich.

**-or-**

Select **Choose** from the 'Item' drop-down list. This option forces the FOH terminal to prompt the cashier to choose an item, such as fries or chips, which gives the guest a choice.



**Tip**

The combo buttons that appear on the FOH terminal are sized based on the number of choices available and the size of the initial Quick Combo button.

- Repeat **step 6** for the remaining components.
- Click **OK** when finished.

**Quick Combo Level** — Specifies the level at which you sell and prepare the Quick Combo. Use this for upgrading and downgrading the price and portions of the Quick Combo. For example, an order for medium fries and a medium drink can be upgraded to large fries and a large drink for \$0.39



cents. The button function applies to all Quick Combos and you define the components for each level in Maintenance > Payments > Promotions. An additional option appears when you select the Quick Combo Level button function.

**Level** — Indicates the specific upsell level to apply to the guest check. Normal designates the normal upsell level for a combo. This is for operations where a combo is set up as upsold by default. Normal would be selected for downsizing. The default is 'Normal.'

**Quick Combo Toggle** — Allows you to quickly build a quick combo based on the primary item of the promotion, and if the guest changes their mind, the system can 'break' the quick combo and return to the primary item. Using this method, employees can easily support the flow of conversational ordering in a Table Service environment. **Documented Version:** v6.2. An additional option appears when you select the Quick Combo Toggle button function:

**Toggle Option** — Indicates how you want the toggle button to function. **Documented Version:** v6.2. Select from one of the following:

- Select 'Add components and apply Quick Combo' to determine if a selected item in the FOH guest check window matches the primary component of a quick combo, and, if so, adds the remaining default components to construct the corresponding quick combo. For example, if you select a burger in the FOH guest check window that is defined as the primary component for the 'Burger' quick combo, and then select the quick combo toggle button, the system builds the 'Burger' quick combo for you. **Documented Version:** v6.2. **Required Options:** You must select 'Primary' for the required component of the quick combo, in Maintenance > Payments > Promotions > Components QS tab.
- Select 'Remove components and Quick Combo' to reduce a selected quick combo in the FOH guest check window back to the primary component defined for the quick combo. For example, if you select the 'Burger' quick combo in the FOH guest check window and a Burger is defined as its primary item, selecting the quick combo toggle button 'breaks' the quick combo and leaves the Burger on the check. **Documented Version:** v6.2. **Required Option:** You must select Primary for the required component of the quick combo, in Maintenance > Payments > Promotions > Components QS tab.
- Select 'Toggle Quick Combo' to specify the button toggles between the quick combo and its primary component, based on the current state of the promotion entered in the FOH guest check window. If you select an item defined as the primary component of a quick combo, and then the quick combo toggle button, the system adds the remaining default components to construct the corresponding quick combo. If you select the full quick combo, and then the quick combo toggle button, the system 'breaks' the quick combo and reduces the promotion to the primary item defined for the corresponding quick combo. **Required Options:** You must select 'Primary' for



the required component of the quick combo, in Maintenance > Payments > Promotions > Components QS tab. **Documented Version:** v6.2.

**Toggle Type** — Determines whether the quick combo toggle affects the active item only or the active item and the previous ordered item.

- Select 'Active item only' to build a quick combo based on the item currently selected on the check. This functionality reduces the need to manually add any additional components of the quick combo to the guest check when a guest decides to purchase a quick combo.
- Select 'Active item with previous' to build a quick combo based on the current item and the previous item listed sequentially on the check. The system verifies that both items are components of an existing quick combo. The two sequential items must reside in the quick-service promotion components to enable the quick combo, and one of the items must be designated as the 'Primary' component, for the POS system to recognize the quick combo. If a non-quick component item is listed on the guest check between the two actual components, an error message appears.

**Quick Count** — Configures counting options used with the Quick Count feature. An additional option appears when you select the Quick Count button function.

**Type** — Specifies the type of count to track.

- Select 'Opening Counts' to open the FOH Open Counts screen with the list of tracking items with 'Open Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.
- Select 'Add Counts' to open the FOH Add Counts screen with the list of tracking items with 'Add Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.
- Select 'Usage Counts' to open the FOH Usage Counts screen with the list of tracking items with 'Use Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.
- Select 'Waste Counts' to open the FOH Waste Counts screen with the list of tracking items with 'Waste Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.
- Select 'Close Counts' to open the FOH Close Counts screen with the list of tracking items with 'Close Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.



#### Reference

Refer to the [Quick Count Feature Focus Guide - HKS316](#) for more information on configuring and using the Quick Count feature.

**Quick Refund** — Enables you to copy a closed check to a new check in the 'refund mode,' all in one action, as opposed to using the 'Refund' button function. The entries and subtotals display in negative amounts. A 'Close Check' button function has to be selected to close the check. **Documented Version:** v6.4. **Required Options: 1)** To allow an employee to perform a refund, access Maintenance > Labor > Pos Access Levels, select 'Cash refunds,' 'Non-cash refunds,' or 'Credit card



refunds' under the Financial group bar, and assign the access level to the employee. **2)** You must access Maintenance > Payments > Tenders > Tender tab and select 'Can refund' for each tender type you will allow to be refunded.

**Recall** — Opens a POS selection dialog box, after you select a terminal, and permits you to recall a guest check, with authorization. Additional options appear when you select the Recall button function.

Order Type To Recall — Indicates the manner in which you want the system to recall checks. 'All' recalls all checks, whether they are opened or closed. 'Open' recalls only open checks. 'Closed' recalls only closed checks.

Search — Enables you to access an additional screen to search for a check to recall. You enter the first letter(s) of the name or first number(s) of the guest check.

**Recall Next** — Recalls the next available order in the specified queue.

**Recall Next Open** — Recalls the next available open order in the specified queue.

**Recall Previous** — Recalls the previous available order in the specified queue.

**Recipe** — Opens the FOH Recipe screen and enables you to view and print available recipes for items.

**Refund** — Places the system in 'refund mode' so you can apply a refund to a guest check. In refund mode, you open a separate check and ring up the items you want to refund. The item prices and sub-total appears as a negative amount. You need to select the Close Check button to close the check and take the system out of refund mode, which reverts all guest check entries and subtotals to back to positive amounts. (You cannot use a Tenders function to close out a refund check because tender function buttons do not understand negative amounts.)

**Release Locked Employee** — Enables you to clear the .olk file that occurs when an employee logs in and allows the employee to log back in to the system. This happens when the system loses connectivity when the employee was currently logged in. This issue only occurs with handhelds and other devices running through the COM interface.

**Reopen Check** — Reopens a closed order from a closed order queue.



**Repeat** — Repeats the selected item. You define the behavior using the following:

Display Quantity Keypad — Displays the quantity keypad when you select the Repeat button and an item or quick combo is entered on the check. **Documented Version:** v6.7.

Include Selection in Quantity — Counts the selection in the guest check window when you quantify an item or quick combo, using the Repeat button. For example, if you select an item or quick combo in the guest check window and quantify the item by 3, the system adds 2 new copies of the item or quick combo to equal 3. If you clear this option, the system adds 3 new copies of the item or quick combo to equal 4. **Documented Version:** v6.7.

**Report Break Alert** — Displays the FOH Break Alert report, which shows the employees who have worked continuously without a break, based on predefined rules.

**Report Clocked In Employees** — Displays the FOH Employees on Clock report, separated by job codes.

**Report Daily Summary** — Displays the FOH Daily Summary Report.

**Report Employee Breaks** — Displays the FOH Employee Breaks report, which shows the break start and end times, with a cumulative total, per shift, for each employee. This allows store managers to easily manage the breaks their employees are required to take.

**Report Flash** — Displays the FOH Flash Report, which contains numerous store statistics.

**Report Prep Projections** — Displays a FOH report of tracking items sold for the day and the time frame in which they were sold. This function is used with the Quick Count feature.

**Report Product Mix** — Displays the FOH report of the cumulative sales for the day, by menu item.

**Report Quick Count** — Displays the FOH report according to the tracking information. Each tracking item and composite tracking item with the 'FOH Quick Count Report' check box selected is included in the report. This function is used with the Quick Count feature.

**Report Restaurant Labor** — Displays the labor costs by employee.

**Report Restaurant Sales** — Displays the FOH report on daily sales.

**Report Restaurant Sales and Labor Statistics** — Produces the Restaurant Sales and Labor Statistics report in the FOH. The name you enter in the 'text' field displays as the report title. **Documented Version:** v7.0.

**Report Site Information** — Displays the following site information: Site name; Site number; Site address; Site phone number; Number of terminals, kitchen screens, and printers; CMC ID; EDC, Connected Payments, and/or APS credit card processing software; Company ID; Store ID; and License ID. Select an order entry panel or a floorplan panel (TS only) or any panel (QS only). **Related**



**Options:** To disable the Site Info button on the login screen, clear 'Enable Site Information button on login' under the 'Troubleshooting' group bar in the System group on the Store Settings tab in Maintenance > Business > Store.

**Report Speed of Service** — Display the Speed of Service for one or all terminals. You can choose to print the report to a chit printer, if desired.

**Reprint CC Voucher** — Prints a credit card voucher on demand.

**Required Modifier Countdown** — Displays the name of the modifier group and a countdown of the minimum number of modifiers left to fulfill the item. This is a read-only button and you can add as many Required Modifier Countdown buttons for each modifier group attached to the item as needed.

**Reroute Display Board** — Opens the Display Board Routing screen and enables you to change how the display board routes. Additional options appear when you select the Reroute Display Board button function.

Reroute Display Board Type — Indicates the type of display board routing to use.

Display Board — Specifies the type of display board to use. This option is available only when the reroute type is set to 'Define Reroute.'

Terminal Options — Specifies whether to route to the default, local, or specific terminal.

Terminal — Specifies the terminal to which the display board connects. This option is available only when the terminal option is set to 'Specific Terminal.'

Default Order Mode — Specifies the default order mode to apply to orders placed from the specified terminal, when the terminal uses the display board.

Route Current Order Only — Routes only the order currently in use, if desired. When the order is complete, the routing returns to the pre-defined terminal. For example, terminal 1 has permanent control, and terminal 2 invokes temporary control. When terminal 2 completes the order, terminal 1 regains control. If terminal 1 had an order on it, that order appears immediately on the display board.

**To add a Reroute Display Board button:**

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Reroute Display Board** from the 'Action' property drop-down list. Additional options appear.



4. Select the **type of reroute** to assign the button from the 'Reroute Display Board Type' property drop-down list.

**Prompt Reroute** — Requires the system to display the POS Display Board Routing screen so you can reroute display boards.

**Define Reroute** — Allows you to preset a display board routing destination.

5. Select the **display board** to reroute from the 'Display Board' property drop-down list. This excludes PCD 101s.
6. Select the **display terminal** for the reroute from the 'Terminal' property drop-down list.
7. If desired, select **True** from the 'Route Current Order Only' property drop-down list, to route only the order currently in use. When the order is complete, the routing returns to the pre-defined terminal. For example, if terminal 1 has permanent control, and terminal 2 invokes temporary control, when terminal 2 completes the order, terminal 1 will regain control. If terminal 1 had an order on it, that order immediately appears on the board.

**Reroute Printer** — Opens the FOH Reroute Printers screen and enables you to modify printer routing.

**Reroute Printer Group** — Opens the FOH Reroute Printer Group screen and enables you to modify the routing for a group of printers.

**Reroute Video** — Opens the FOH Reroute Video screen and enables you to change how the video monitor routes. This function is used with video display systems.

Automatic Reroute — Reroutes menu items to the specified video queue; otherwise, the FOH terminal prompts for a specific video queue. **Related Options:** Selecting True enables the 'From Video Queue' and 'To Video Queue' options.

From Video Queue — Indicates the current video queue to reroute. **Required Options:** You must set 'Automatic Reroute' to True to enable this option.

To Video Queue — Indicates where to reroute the current video queue. **Required Options:** You must set 'Automatic Reroute' to True to enable this option.

#### To add a Reroute Video button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Reroute Video** from the 'Action' property drop-down list. Additional options appear.
4. If desired, select **True** from the 'AutoReroute' property drop-down list, to force the system to automatically perform video reroutes when an employee touches this button.



5. Select the **video queue** you want to reroute from the 'FromVideoQueue' property drop-down list. This option is only available when automatic reroute is active.
6. Select **where** you want to reroute the video queue from the 'ToVideoQueue' property drop-down list. This option is only available when automatic reroute is active.

**Reroute Video Group** — Opens the FOH Reroute Video Group screen, enabling the ability to alter the routing for a group of videos. Use this function with video display systems.

Automatic Reroute — Reroutes menu items to the specified video group; otherwise, the FOH terminal prompts for a specific video group. **Related Options:** Selecting True enables the 'From Video Group' and 'To Video Group' options.

Terminal — Indicates the specific terminal for which the system reroutes video groups. If you do not select a specific terminal, the system reroutes video groups for all terminals. **Required Options:** You must set 'Automatic Reroute' to True to enable this option.

From Video Group — Indicates the current video group to reroute. **Required Options:** You must set 'Automatic Reroute' to True to enable this option.

To Video Group — Indicates where to reroute the current video group. **Required Options:** You must set 'Automatic Reroute' to True to enable this option.

#### To add a Reroute Video Group button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Reroute Video Group** from the 'Action' property drop-down list. Additional options appear.
4. If desired, select **True** from the 'AutoReroute' property drop-down list, to force the system to automatically perform video group reroutes when an employee touches this button.
5. Select the **terminal** for the reroute from the 'Terminal' property drop-down list. This option is only available when automatic reroute is active.
6. Select the **video group you want to reroute** from the 'FromVideoGroup' property drop-down list. This option is only available when automatic reroute is active.
7. Select **where you want to reroute the video group** from the 'ToVideoGroup' property drop-down list. This option is only available when automatic reroute is active.

**Resend Failed Credit Card Transaction** — Enables employees clocked in with this access level to send a failed transaction to the host a second time for authorization. The employee must first select the failed credit card transaction on the guest check, and then touch the 'Resend' button to send the transaction back to the processor. **Documented Version:** v14.1.



**Resend to Kitchen** — Resubmits the items selected from the current check, after the items are ordered, or from a recalled check, to the kitchen for printing on a new kitchen chit. This is useful in situations where an order is delivered to a table with a missing item or when the kitchen staff misplaces a kitchen chit. The text 'REORDER' prints as the header on the new chit, to indicate the items were submitted to the kitchen earlier on a previous chit. **Related Options:** To allow an employee to use the Resend to Kitchen button, access Maintenance > Labor > Pos Access Levels, select 'Resend chit to kitchen' under the 'Financial' group bar, and assign the access level to the employee.

**Review Lock** — Locks the displayed order in the review check panel(s). To unlock the order, touch Review Lock again.

**Review Next** — Displays the next available order in the review check panel, for the specified queue.

**Review Previous** — Recalls the previous available order in the review check panel, for the specified queue.

**Routing Level** — Opens the FOH Routing Levels screen, providing overall control of where items waiting in a queue route to and from. An additional option appears when you select the Routing Level button function.

**Routing Level** — Indicates the specific routing level you want the system to follow, when you touch the Routing Level button on the POS terminal. A routing level contains its own set of reroutes that are pre-defined in Maintenance > System > Routing Levels.

**Run Application** — Enables the use of another application located on the file server. Common applications are Calculator, Microsoft Word®, and Microsoft Excel®. Additional options appear when you select the Run Application button function.

**Application** — Specifies the path and file name of the application to run.

**Pass Parameters** — Indicates to add any parameters that are defined in the command line of the application. The default is 'False.'

**Continue Script Immediately** — Indicates to bypass any error messages the Run Application function might encounter. Use this option if the system takes too long to locate the external application and holds up the POS operation. The default is 'False.'

#### **To add a Run Application button:**

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Run Application** from the 'Action' property drop-down list. Additional options appear.



4. Click the **left column** of the 'ApplicationName' property and in the right column, type the **application name and path** for the application you want to run.
5. If desired, select **True** from the 'Pass Parameters' property drop-down list, to pass any parameters that might be defined in the command line of the application.
6. If desired, select **True** from the 'ContinueScriptImmediately' property drop-down list, to bypass any error messages the Run Application function might encounter. Use this setting if the system takes too long to locate the external application and holds up POS operations.

**Script** — Enables you to combine multiple button functions in one button selection. An additional option appears when you select the Script button function. If you are an existing Aloha customer, and you previously had multiple sets of scripts within a script, the system displays each button function in sequence, as one single script.

Script Actions — Specifies the button actions to combine for the current script button. You must click the ellipses button (...) to select button actions on the Edit Script Action dialog box.

When you create a Script button, first determine the order in which you want functions to operate, then add each function to the Script dialog box, in that order. When you touch a script button on the POS terminal, the functions execute in sequence. For example, a payment, or tender button is typically set up as a Script button because when you apply payment to an order, you usually want several functions to happen in sequence, such as apply tender payment, close the check, and return you to a specific panel or group of panels, so you can start a new order. In this situation, you add a Tender, Close Check, and Chain function to the script, in that order.



**Tip**

To require manager approval before a specific button function can execute, use the Just In Time (JIT) Manager Approval button function in the script. Assign the JIT button directly preceding the button function for which you require manager approval. When you select the JIT Manager Approval button function, you need to also select at least one access level that has the authority to perform the button function without the need for Manager Approval.

**To add a Script button:**

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Script** from the 'Action' property drop-down list. An additional option appears.



- Click the **left column** of the 'ScriptActions' property, then click the **ellipses button (...)**. The Edit Script Actions dialog box appears.

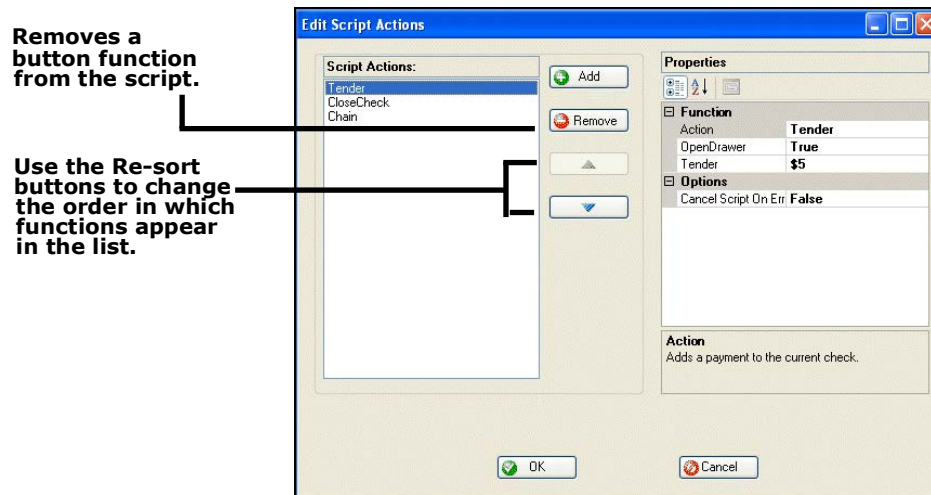


Figure 54 Edit Script Actions Dialog Box with Example Script Actions

- Click **Add**. The Function and Options categories appear under the Properties column.
- Select the first **button function** to assign to the script, from the 'Action' property drop-down list. Additional properties might appear.
- Complete any additional **properties** that appear when you select a button function from the 'Action' property drop-down list.
- If desired, select **False** from the 'Cancel Script On Error' property drop-down list, to enable the script to continue if the selected function fails or asks for a confirmation.
- Repeat **steps 5 through 8** for each additional button function you add to the script.



#### Tip

In some cases, you might need to change the order in which each function operates. The Re-sort feature enables you to change the order in which the functions appear in the Script Actions list. Click the applicable Re-sort button, to move a function up and down in the list.

- Click **OK** when finished. The Script Action property displays the button function names added to the script.

**Self Assign Delivery Orders** — Opens the FOH Delivery Orders screen and enables you to assign delivery orders, if the 'Delivery' and 'Self Assign Orders' check boxes are selected for the job code. This function is used with the Delivery/Frequent Buyer program.



**Send** — Sends the current order to the kitchen with an order mode. An additional option appears when you select the Send button function:

Include Suspended Items in Send — Sends all items, including the items held in 'suspend mode,' to the kitchen. Use this option in an environment where you wish to allow each guest in a large party to pay for their check as they order. This ensures the items are not sent to the kitchen until you are ready. **Required Options: 1)** To place items in 'suspend mode,' you must first touch a button configured with the Suspend Items Toggle button function. **2)** To define a suspended mode indicator to precede each suspended item, and appear in the corner of the FOH guest check window, type up to three characters for the 'Prefix for items in suspend mode' option in Maintenance > Business > Store > Store Settings tab > User Interface group.

**Served Order** — Indicates you have given the order to the guest. Touch this button after handing the order to the guest to stop the recording of the speed of service metric. The system records the time at which you touch this button as the end time for the transaction. **Related Options:** If you select 'Use served order time' from the 'Speed of Service' drop-down list in Maintenance > System Settings > Order Entry Queues, you must create a Served Order button using this button function.

**Server Sales** — Displays the FOH Server Sales Report. Additional options appear when you select the Server Sales button function.

Ask for Occasion — Indicates to prompt for the occasion.

Ask for Time — Opens the FOH Select Start Time screen to define a specific time for the Server Sales report to run.

**Shutdown Term** — Shuts down terminals running Windows and passes through the Windows shutdown screen. This avoids corruption of the terminals.

**Sign In/Out Driver** — Signs a driver in or out on delivery runs, if the Delivery/Frequent Buyer program is in use.

**Smart Item** — Defines an order item based on the Smart Select group and element, thereby, reducing the number of buttons on a panel. This accommodates items sold at various sizes, measurements, and prices, such as small, medium, and large.

Default Item — Indicates the item to order by default, when a Smart Select button is not chosen first on the POS terminal. For example, if you select a medium size coke as the default, when an employee touches the Diet Coke button on the POS terminal without first touching a Smart Select button, a medium Diet Coke is ordered by default.

Items — Specifies the item to associate with the Smart Group and Smart Element. Select the smart group, as defined in the associated Smart Select button function. Select the smart element to indicate a specific size, as defined in the corresponding Smart Select button function. For example, Kid size might correspond to Smart Element 1. Select the smart item to associate with the Smart



Group and Smart Element. An item for each variation must be created previously in Maintenance > Menu > Items, for the items to appear in the in the Item drop-down list. (For example, Kid Coke, Small Coke, Medium Coke, Large Coke.

Replace highlighted Smart Item on guest check — Allows you to modify the currently selected 'Smart Item' on the guest check instead of adding the item to the guest check.

**Smart Select** — Designates the 'Smart Group' and 'Smart Element' associated with a Smart Item. Additional options appear when you select the Smart Select button function.

Smart Group — Designates a specific grouping of sizes. For example, beverage sizes might be assigned to smart group 1 and french fry sizes might be assigned to smart group 2. Small menus usually have very few smart groups.

Smart Element — Indicates a specific size within the smart group. For example, for a beverage smart group that consists of sizes: kid, small, medium, and large, you might assign element 1 to the kid size, element 2 to the small size, element 3 to the medium size, and element 4 to the large size.



#### Note

A smart element can refer to sizes, fluid levels, and more. Additionally, each time you order a smart item on the POS terminal, the smart element is cleared to zero when another button is touched.

Replace highlighted Smart Item on guest check — Allows you to modify the currently selected 'Smart Item' on the guest check instead of adding the item to the guest check.

The Smart Select and Smart Item button functions work together to create a panel containing items which are sold by size, without having to add each item to the panel, which enables you to create smaller, less confusing panels. For example, let's say your Items database contains the following soft drink items:

• Small Coke	• Small Dr. Pepper
• Medium Coke	• Medium Dr. Pepper
• Large Coke	• Large Dr. Pepper
• Kids Coke	• Kids Dr. Pepper
• Small Diet Coke	• Small Sprite
• Medium Diet Coke	• Medium Sprite
• Large Diet Coke	• Large Sprite
• Kids Diet Coke	• Kids Sprite



Without Smart Select and Smart Item, 16 buttons are required on the Beverages panel to accommodate these soft drinks. With Smart Select and Smart Item, only eight buttons are required.



Figure 55 Sample Smart Item and Smart Select Buttons

For each new beverage, only one more button is required, therefore, the larger the variety of soft drinks that you offer, the more beneficial this feature becomes. The Smart Select button function defines the assorted sizes in the group. The Smart Item button function specifies the items associated with each beverage button, and designates the default size to order if the Smart Select button is not selected first. When a cashier orders a beverage on a POS terminal, they touch the size button, then touch the desired drink. If the cashier does not touch a size button first, the size you establish as the default is ordered.



**Note**

Place Smart Selects and Smart Items with the same Smart Group number on the same panel.

A Smart Select button designates the 'Smart Group' and 'Smart Element' associated with a smart item, and a Smart Item button defines an order item based on the Smart Select group and element, thereby, reducing the number of buttons on a panel. This accommodates items sold at various sizes, measurements, and prices, such as small, medium, and large.



The following setup depicts the requirements to configure Smart Select buttons for the Beverage Sizes Smart Group.

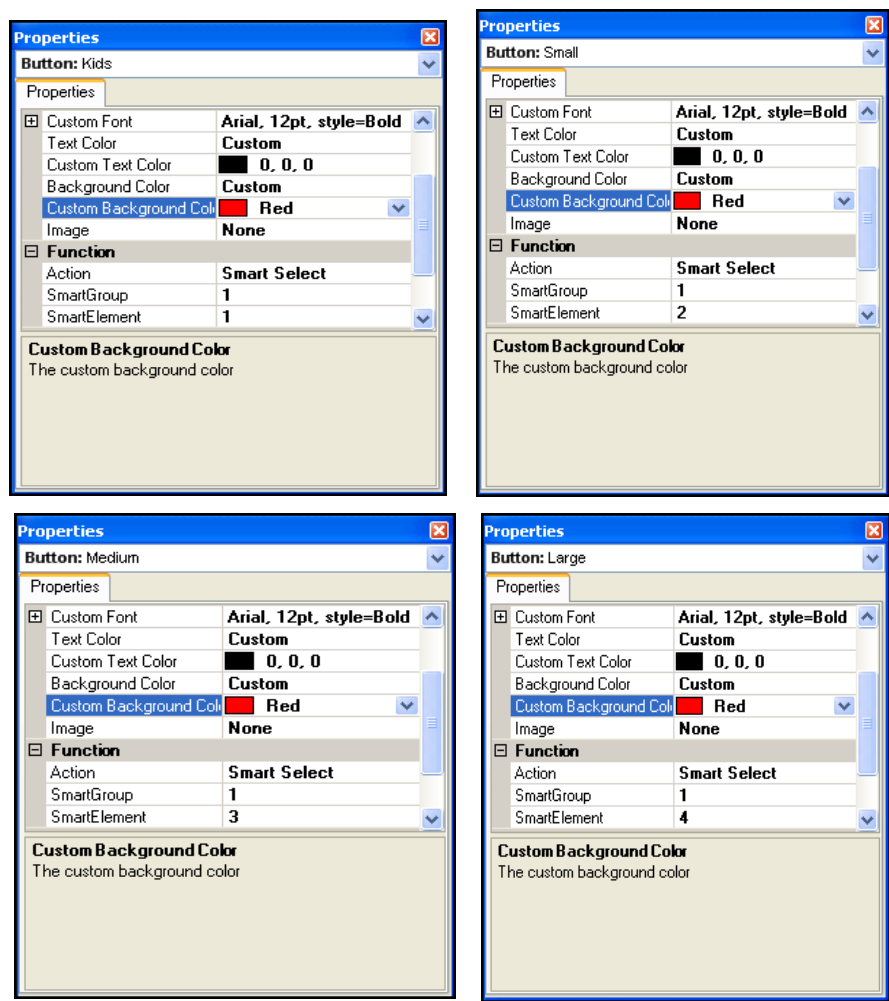


Figure 56 Smart Select Configuration



The following setup depicts the requirements to configure Smart Items for a Diet Coke button, based on the Smart Select button:

Group	Element	Item
1	1	141345 Kids Diet Coke
1	2	141350 Sm Diet Coke
1	3	141355 Med Diet Coke
1	4	141360 Lg Diet Coke
		0 None
		0 None
		0 None
		0 None
		0 None
		0 None
		0 None
		0 None
		0 None

Figure 57 Smart Item Configuration



#### Caution

The Smart Select and Smart Item button functions are discussed in the order required for setup, not the order in which they appear in the list.

#### To add a Smart Select button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Smart Select** from the 'Action' property drop-down list. Additional options appear.
4. Click the **left column** of the 'SmartGroup' property and in the right column, type a **smart group number** to designate a specific grouping of sizes. For example, beverage sizes might be assigned to smart group 1 and french fry sizes might be assigned to smart group 2. Small menus usually have very few smart groups.
5. Click the **left column** of the 'SmartElement' property and in the right column, type the **smart element** to indicate a specific size within the smart group. For example, for a beverage smart



group that consists of Kid, Small, Medium, and Large sizes, you might assign element 1 to the Kid size, element 2 to the Small size, element 3 to the Medium size, and element 4 to the Large size.



#### Note

A smart element can refer to sizes, fluid levels, and more. Additionally, each time you order a smart item on the POS terminal, the smart element resets to zero when you touch another button.

#### To add a Smart Item button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Smart Item** from the 'Action' property drop-down list. Additional options appear.
4. Select the **Default Item** to order by default, when a Smart Select button is not chosen first in the FOH. For example, if a medium size coke is selected as the default, when an employee touches the Diet Coke button on the POS terminal, without first touching a Smart Select button, a medium Diet Coke is ordered by default.
5. Click the **left column** of the 'Smart Element' property, then click the **ellipses button (...)**. The Select Smart Items dialog box appears.
6. Select the smart group, as defined in the associated Smart Select button function.
7. Select the **smart element** to indicate a specific size, as defined in the corresponding Smart Select button function. For example, Kid size might correspond to Smart Element 1.
8. Select the **smart item** to associate with the Smart Group and Smart Element. An item for each variation must be created previously in Maintenance > Menu > Items, for the items to appear in the in the Item drop-down list. (For example, Kid Coke, Small Coke, Medium Coke, Large Coke.)
9. Repeat **steps 6 through 8** for each remaining item.
10. Click **OK**.

**Special Message** — Displays the Special Message screen so you can enter a free text description. This button function is equivalent to the 'typewriter' button on the 'classic' modifier screen.

**Split Check** — Enables you to split an order into separate checks with a single button press.

**Required Option:** To allow employees to split checks, select 'Split Checks' in Maintenance > Labor > POS Access Levels and assign the access level to the employee. **Related Options: 1)** To print the number of split checks on the employee checkout report, select 'Print number of split checks' in Maintenance > Business > Store > Store Settings tab > Report Printing group > 'Employee Checkout' group bar. **2)** To allow employees to split checks with applied promotions, comps, or tax exemptions, select 'Allow checks with comps, promotions, and/or tax-exempt items to be split' in Maintenance > Business > Store > Store Settings tab > Security group > 'Restrictions' group bar. **3)** To restrict employees from moving applied payments from one split check to another, select 'Cannot move payment types' in Maintenance > Business > Store > Store Settings tab > Security group > 'Restrictions' group bar.



**Store Order** — Adds the current order to the end of the queue. Use this function in a drive-thru environment when you want to store an order without closing the order.

**Suspend Items Toggle** — Enables you to place the current check into a 'suspended mode,' and does not send the items to the kitchen until needed. If you touch the button again while in suspended mode, the system exits the suspended mode and the items are sent to the kitchen, as normal. This function is designed to be used with the Split Checks feature, and enables all items for a large party to be sent to the kitchen simultaneously, so all guests receive their food at the same time. **Required Option:** To define a suspended mode indicator to precede each suspended item, and appear in the top right corner of the FOH guest check window, type up to three characters for the 'Prefix for items in suspend mode' option in Maintenance > Business > Store > Store Settings tab > User Interface group.

**Tax Exempt** — Opens the FOH Tax Exempt screen, into which you can enter a tax exempt number and remove exclusive taxes from the guest check.

**Tender** — Applies a specified payment to the current guest check.

Tender — Indicates the specific payment type to apply to the check. Tender types, which are used to apply payment to a guest check, must be defined previously in Maintenance > Payments > Tenders, to appear in the drop-down list.

Open Drawer — Opens the cash drawer automatically when the cashier selects that tender type.



**Tip**

The cash drawer setting on the Maintenance > Store Settings > Security > Cash Drawer tab overrides all tender buttons with Open Drawer set to 'True.'

The Tender button enables you to apply payment to an open order. Tender buttons are usually set up as Script buttons because with a Script button, you not only define the button to apply a payment to a check, you can also define the button to close the check, and return to a new, blank guest check, all at the touch of a single button.

**To add a Tender button:**

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Tender** from the 'Action' property drop-down list. Additional options appear.



4. Select the **tender type** to assign to the button. Tender types, which are used to apply payment to a guest check, must be defined previously in Maintenance > Payments > Tenders, to appear in the drop-down list.
5. If desired, select **True** from the 'OpenDrawer' property drop-down list, to open the cash drawer when the cashier selects that tender method.



#### Tip

The cash drawer setting on the Maintenance > Store Settings > Security > Cash Drawer tab overrides all tender buttons with Open Drawer set to true.

**Undo Modifications** — Allows you to remove any modifications made to build an item, before the item is ordered and revert back to its original state. This button function only applies to an item configured as a build item type. **Documented Version:** v12.3.

**View Schedule** — Enables a FOH employee to view prepared labor schedules from the FOH, on demand. **Related Options:** To enable the system to automatically print employee schedules on the clock-out chit, select 'Print schedule on clock-out chit' in Maintenance > Business > Store > Store Settings tab > Labor group > 'Clock In/Out' group bar. **Documented Version:** v6.7. **Related Requirements:** For Quick Service, you must access Screen Designer and add the View Schedule button to a panel in use.

**Volume Level** — Enables you to change the sales volume level that appears on the video display system to indicate that the level of sales volume increased or decreased. This helps the fast-food kitchen staff know to prepare more food to accommodate a sudden spike in business. An additional option appears when you select the Volume Level button function.

VolumeLevel — Indicates the specific volume level to appear on the video display.



#### Note

You need to create a separate volume level button for each level you created in Maintenance > System > Volume Level. Use this function with video display systems.



## Appendix C: Widget function descriptions

Appendix C provides a description for each type of widget you can add to a Dashboard panel. The widget types are listed in alphabetical order:



### Tip

An asterisk (\*) denotes functions we recommend for managers of higher level employees to access. Most functions are controlled by the access level of the employee, as well as the job code. Refer to Labor Functions, for more information on Access Levels and Job Codes.



### Reference

Refer to the [Dashboard Feature Focus Guide - HKS323](#) for more information on configuring and using this feature.

### To add the desired widgets to a dashboard panel:

1. Click inside the **dashboard panel**.
2. Select **Panel > New Widget**. A widget of the 'Guest check count' type appears on the panel as the default selection. The Properties dialog box also reflects settings for the 'Guest check count' widget.
3. To choose a widget of a different type, make a selection from the **Type** drop-down list. You can resize, move, and configure any dashboard widget to suit your needs.
4. Refer to the **appropriate procedure** for specific instructions on configuring each type of widget.

### List of widgets

**Current Day Part** — Displays the name of the active day part, as configured in Maintenance > System Settings > Day Part. **Documented Version:** v14.1.

Display format — Enables the name of the active day part to display in text. 'Text only' is the only option that appears for the 'Current day part' widget in 'Display format.'

**Date** — Displays the current date of business on the dashboard. Additional options appear when you select the Date widget function. **Documented Version:** v14.1.

Display format — Enables the current date of business to display in text. 'Text only' is the only option that appears for the 'Date' widget in 'Display format.'

Date format — Allows the current date of business to display in one of the three following formats: (1) MM/DD/YY; (2) Day, Month and Date, Year; or (3) Month and Date, Year.



**Guest Check Count** — Displays a running guest check count, which you can reset between each day part. Configure your minimum and maximum thresholds, including threshold colors, for easy identification of alerts. You can also configure this widget to alert you in ascending or descending order. Choose the method that best suits your requirements. Additional options appear when you select the Guest Check Count widget function. **Documented Version:** v14.1.

Display format — Enables the running guest check count to display as text, a graph, or a gauge.

Link to report — Displays a specific report to appear on the screen when you touch the widget. As of this publication, the system offers the (1) Break Alert Report, (2) Daily Summary Report, (3) Employee Breaks Report, (4) Flash Report, (5) Labor Report, (6) Product Mix Report, (7) Sales Report, or (8) Server Sales Report.

Labor group — Displays a labor group, such as Non-Salary.

Limit by day part — Enables you to limit the guest check count by day part. Select True to enable, or False to disable, this feature.

Starting day part — Enables the guest check count to begin by a specific day part.

Ending day part — Enables the guest check count to end by a specific day part.

Alert calculation — Determines if the alert for the guest check count widget occurs when the calculation is greater than or when it is less than each threshold.

Display minimum — Determines at which to begin incrementing and displaying the guest check count calculation in the widget.

Display maximum — Determines at which to stop incrementing and displaying the guest check count calculation in the widget.

Threshold 1 amount — Displays the guest check count when the first critical alert is met.

Threshold 1 color — Displays the color you select to indicate you have met the first critical threshold.

Threshold 2 amount — Displays the guest check count when the second critical alert is met.

Threshold 2 color — Displays the color you select to indicate you have met the second critical threshold.



**Sales** — Displays the current sales, which you can reset between day parts. Configure your minimum and maximum thresholds, including threshold colors, for easy identification of alerts. You can also configure this widget to alert you in ascending or descending order. **Documented Version:** v14.1.

Display format — Enables the sales widget to display as text, a graph, or a gauge.

Link to report — Displays a specific report to appear on the screen when you touch the widget. As of this publication, the system offers the (1) Break Alert Report, (2) Daily Summary Report, (3) Employee Breaks Report, (4) Flash Report, (5) Labor Report, (6) Product Mix Report, (7) Sales Report, or (8) Server Sales Report.

Limit by day part — Enables you to limit the guest check count by day part. Select True to enable, or False to disable, this feature.

Starting day part — Enables the sales widget to begin by a specific day part.

Ending day part — Enables the sales widget to end by a specific day part.

Alert calculation — Determines if the alert for the sales widget occurs when the calculation is greater than or when it is less than each threshold.

Display minimum — Determines at which to begin incrementing and displaying the sales calculation in the widget.

Display maximum — Determines at which to stop incrementing and displaying the sales calculation in the widget.

Normal threshold color — Displays the color you select to indicate you are in the acceptable threshold range.

Warning threshold amount — Displays the amount at which the defined warning threshold is met.

Warning threshold color — Displays the designated color to indicate you have met the defined warning threshold.

Critical threshold amount — Displays the amount at which the defined critical threshold is met.

Alarm threshold color — Displays the designated color to indicate you have reached the defined critical threshold.

**Time** — Displays the current time on the dashboard. **Documented Version:** v14.1.

Display format — Enables the time widget to display.

Time format — Allows the current time to display in one of the three following formats: (1) HH:MM, (2) HH:MM:SS, or (3) as a 24-hour clock.



# Index

## Symbols

\* (asterisk), to indicate unsaved edits ..... 1-35

## A

activating screens ..... 1-85	panel titles ..... 1-43
adding	panels to a screen ..... 1-76
buttons ..... 1-57	assigning
images to buttons ..... 1-61, 1-63	a screen to a job code ..... 1-85
images to panels ..... 1-45	a screen to a terminal ..... 1-86

## B

bitmaps ..... 1-13	changing color of ..... 1-62
adding to buttons ..... 1-61, 1-63	changing text font on ..... 1-62
adding to panels ..... 1-45	defined ..... 1-13
and multi-media files ..... 1-10	descriptions for ..... 1-103
property definitions ..... 1-100	menu item ..... 1-60
button actions ..... 1-103	moving ..... 1-65
button functions	property definitions ..... 1-96
defined ..... 1-103	resizing ..... 1-64
button grids ..... 1-55	selecting multiple ..... 1-62
properties window ..... 1-102	setting events for ..... 1-69
using ..... 1-58	smart item ..... 1-145
buttons	smart select ..... 1-144
adding ..... 1-57	sorting ..... 1-67
adding with button grid ..... 1-58	types of ..... 1-52
aligning and spacing ..... 1-66	using the lasso to select ..... 1-57
assigning to a tag ..... 1-53	

## C

Check Functions panel ..... 1-19	Comp panel ..... 1-18
closing	copying
panels ..... 1-51	panels ..... 1-47
color	creating
on a button ..... 1-62	buttons ..... 1-57
on a panel ..... 1-45	default screens ..... 1-70
on a screen ..... 1-74	panels ..... 1-39
command panel ..... 1-73	

## D

default screen ..... 1-70	desktop size ..... 1-31
deleting	
buttons ..... 1-68	
panels ..... 1-51	



<b>E</b>			
Employee Functions panel .....	1-20	activate panel button .....	1-69
events .....		set job screen .....	1-89
<b>G</b>			
graphics .....	1-10		
<b>H</b>			
Home screen .....	1-30		
<b>I</b>			
images .....		on a screen .....	1-77
adding to buttons .....	1-61, 1-63	uploading .....	1-10
adding to panels .....	1-45	is .....	1-3
described .....	1-13	Item button .....	1-60
<b>J</b>			
job codes .....	1-71, 1-85	assigning default screens to .....	1-85
<b>L</b>			
lasso tool .....	1-8		
<b>M</b>			
Main screen .....		Menu panel .....	1-17
creating .....	1-73	Modifier panel .....	1-18
Manager Functions panel .....	1-20	moving .....	
mark as template .....	1-48	buttons .....	1-65
Menu bar .....		panels .....	1-46
for Panel Editor .....	1-32	multi-media files .....	1-10
for Screen Editor .....	1-72		
<b>N</b>			
Navigation window .....	1-82	numbering .....	
Number Assignment dialog box ....	1-40, 1-47, 1-74	panels .....	1-40, 1-47
		screens .....	1-74
<b>O</b>			
opening .....		<i>see also</i> panel ownership .....	1-36
a panel .....	1-42	defined .....	1-5
a screen .....	1-76	screen .....	1-70
all panels for a screen .....	1-42	settting panel .....	1-36
order entry screen .....	1-10	understanding in Screen Designer .....	1-5
ownership .....			
<b>P</b>			
Panel Editor .....		exiting .....	1-35
basics .....	1-37	opening and exiting .....	1-35
button grid .....	1-55	Properties window .....	1-33, 1-52
defined .....	1-4	screen components .....	1-32



undo and redo commands .....	1-34	recommended .....	1-70
workspace .....	1-33	resizing .....	1-46
panel elements		saving .....	1-50
basics .....	1-52	setting properties for .....	1-43
defined .....	1-13	types of .....	1-37
panel properties		versioning .....	1-38
defined .....	1-43	Preview tab .....	1-72
panels		Promotions panel .....	1-18
adding buttons to .....	1-57	properties	
adding images to .....	1-45	bitmap .....	1-100
adding titles to .....	1-43	button .....	1-96
changing the color of .....	1-45	panel .....	1-33, 1-52
closing .....	1-51	Properties window .....	1-6
copying .....	1-47	Appearance group .....	1-90, 1-96, 1-100
creating .....	1-39	bitmap properties .....	1-100
creating versions of .....	1-49	button grid properties .....	1-102
defined .....	1-11	button property definitions .....	1-96
deleting .....	1-51	described .....	1-33, 1-52
examples of .....	1-17	Functions group .....	1-100
locking in place .....	1-48	Identification group .....	1-94
moving .....	1-46	Layout group .....	1-95, 1-100, 1-101
numbering .....	1-40, 1-47	navigation .....	1-33
opening .....	1-42	panel properties	
overlapping .....	1-70	defined .....	1-90
property definitions .....	1-90	setting properties .....	1-43

**Q**

Quantity panel .....	1-19
----------------------	------

**R**

redo .....	1-34	buttons .....	1-64
resizing		panels .....	1-46

**S**

saving		described .....	1-70
panels .....	1-50	opening and exiting .....	1-73
Screen Designer		Preview tab .....	1-72
about .....	1-3	screen components .....	1-72
accessing .....	1-30	Screen tab .....	1-72
home screen .....	1-30	screen ownership .....	1-70
new features .....	1-6	screen resolution .....	1-31
setting desktop size for .....	1-31	Screen Simulator	
what's new in .....	1-6	defined .....	1-4
Screen Editor		Navigation window .....	1-82
defined .....	1-4	opening and exiting .....	1-83



---

Properties window .....	1-81	deciding a color scheme for .....	1-16
restarting a test .....	1-84	deciding the look and layout of .....	1-16
screen components .....	1-80	default .....	1-15, 1-70
Screen tab .....	1-72	job code assignment .....	1-71
screens		numbering .....	1-74
activating .....	1-85	opening .....	1-76
adding panels to .....	1-76	organizing .....	1-70
applying color or images to .....	1-77	owners assigned to .....	1-70
assigning default screens to job codes .....	1-85	removing panels from .....	1-76
assigning default screens to terminals .....	1-86	restricting access to .....	1-87
assigning to job codes .....	1-85	searching for .....	1-73
creating .....	1-73	setting events for .....	1-89
creating versions of .....	1-78	testing .....	1-80, 1-84
		versioning .....	1-71
		Submenu panel .....	1-18

---

<b>T</b>			
tables .....	1-52	testing a screen .....	1-80, 1-84
tags		text font	
button assignment .....	1-53	changing button .....	1-62
Tenders panel .....	1-19	titles	
terminals		adding to panels .....	1-43
assigning default screens to .....	1-86		

---

<b>U</b>			
undo .....	1-34		

---

<b>V</b>			
versioning		screens .....	1-78
panels .....	1-49		

---

<b>W</b>			
workspace .....	1-33		

---

<b>X</b>			
X and Y coordinates .....	1-46		



## Aloha Quick Service v19.9, Screen Designer Guide

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