Feature Focus Guide:
Customer Survey

Core Product: Aloha Quick Service, Aloha Table Service
Last Updated: May 21, 2024

Contents

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Revision Record

Date	Version #	Description
Prior to 09/22/2022	v4.228+	Implemented the Customer Survey feature with key support and using Survey.txt.
	v4.905+	Added ability to configure the Customer Survey feature through Aloha Manager without the need for Survey.txt.
	v5.3.19.206+	Added support for the 16-digit survey ID code output.
	v5.3.36+	Added support for the 20-digit survey ID code output.
	v5.4.1.340+	Added support to define a threshold to indicate experienced employees.
	v6.1+	Implemented the Customer Survey feature with Aloha Quick Service. Added the ability to print the survey on a separate chit following the guest check for both Aloha Quick Service and Aloha Table Service
	v6.4+	Added ability to suppress the pipe characters that frame the survey code on the printed receipt
	v6.5+	Added 'DOB,' 'UID,' 'NAME,' 'ADRF,' 'ADRS,' 'PHNF,' and 'PHNS' as additional keywords you can use in the survey message or banner
	v7.0+	Starting with Aloha Manager v7.0, you must configure the Customer Survey feature within the Aloha Configuration Center interface
	v12.3+	Added the ability to include the survey on each reprinted check.
	v14.1+	Added the ability to print the survey on each split check.
	v17.1+	Added the ability to print a survey code as a bar code or QR code, set printing conditions, included Campaign Rulebook reference, and the 'All' feature for day parts
	v19.3+	Added the ability to add a website address to survey QR codes.
09/22/2023		Converted the document to use new templates.
01/13/2023		Updated the front cover and back page to reflect new NCR branding.
05/21/2024		Updated document to reflect NCR Voyix branding.

About Customer Survey

Customer Survey at a Glance	
Core Product	Aloha® Quick Service, Aloha Table Service
Separate License Required?	Yes
Other References	Aloha Quick Service Manager Guide, Aloha Quick Service Reference Guide, Aloha Table Service Manager Guide; Aloha Table Service Reference Guide

Aloha® Quick Service and Aloha Table Service offer a Customer Survey feature that provides restaurants the ability to prompt randomly selected guests for feedback about their dining experience in exchange for a reward or discount. The prompt prints on the guest check along with a phone number for the guest to call and enter a unique code to access the survey; otherwise, guests use a smart phone or tablet to scan either a bar code or QR code that prints on the guest check to access the survey on your website or app. You can define the times the survey is valid, the frequency the survey prints for specific day parts or all day, and the text to appear in the survey. Using Campaign Rulebook, you set conditions for printing the survey, such as printing the survey when the guest check totals $30.00 or more, if the guest purchases from the appetizer menu, and more. Conversely, you can prevent a survey from printing if a specific comp or promo appears on the guest check.

> **Tip**
> To use the Customer Survey feature, you must enable the feature on your normal Aloha security key at an additional cost. Contact your NCR Voyix account representative to enable customer surveys on your security key.

> **Reference**
> Campaign Rulebook uses the customer surveys you create in the Survey function. Refer to the Campaign Rulebook Feature Focus Guide - HKS324 for more information regarding setting conditions for printing customer surveys.

Benefits of the Customer Survey feature:

You can:

- Improve your client base, through guest feedback, with minimal effort and labor.
- Print an eye-catching banner for guests to notice and read at the bottom of the guest check.
- Print the survey in intervals, for selected guests, to reduce paper waste and cost.
- Print an indication in the survey code that reflects whether or not the employee providing service is experienced.

Configuring Customer Survey

This section details the configuration requirements for the Customer Survey. You must access several functions to complete the configuration. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Customer Survey Procedures at a Glance:
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task. Click Previous View ⊙ to return to this location and proceed to the next step.

1.	Access **Maintenance > Business > Additional Features** and select 'Display survey' to display options for the Customer Survey feature. (Note: If using Aloha Configuration Center, log in as a corporate user and access **Maintenance > Business > Corporate Administration**.) See page 6.
2.	Access **Maintenance > Business > Store > Store Settings** tab **> System** group to activate the customer survey feature, define the threshold for the number of days at which you consider an employee experienced, and determine if the survey prints on each customer copy when the check is split. See page 8.
3.	Access **Maintenance > Messaging > Survey > Survey** tab and define the code output type, start and end dates the survey is valid, and the printing frequency. See page 11.
4.	Access **Maintenance > Messaging > Survey > Banner** tab to define the introductory text to print on the guest check. See page 15.
5.	Access **Maintenance > Messaging > Survey > Message** tab to define the instructional text to print on the guest check. See page 16.
6.	Select **Maintenance > Business > Store** and add the 'NoSurveyPipe' variable to the Custom tab, if you do not want the survey code framed by a beginning and ending pipe character. See page 18.
7.	Select **Maintenance > Business > Store** and add the 'ReprintSurvey' variable to the Custom tab, if you want the survey to print each time you reprint the check. See page 18.
8.	Access **Utilities > Refresh POS Data** to update the information on the Aloha Front-of-House (FOH) terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. See page 19.

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Displaying customer survey options

You must select 'Display survey' in the appropriate function to display the options related to customer survey on the interface.

To display customer survey options:

1. Select **Maintenance > Business > Additional Features** if you are using Aloha Manager.
   -OR-

   Select **Maintenance > Business > Corporate Administration** if you are using Aloha Configuration Center.

Figure 1 Corporate Administration - Display Survey

2. Under the 'Options to display' group bar, select '**Display survey**.'
3. Click **Save** and exit the **Additional Features (Corporate Administration)**.
4. Log out of and back in to the **configuration management tool**.

Activating the customer survey

You must activate the Customer Survey feature in the Store function before you can define the text to appear on the guest check and enable the incentive to print on the guest check. Here you must also define the threshold at which you consider an employee experienced, and determine if the survey prints on each customer copy when the check is split.

To activate the customer survey:

1. Select **Maintenance > Business > Store**.
2. Select the **Store Settings** tab.
3. Select the **System** group at the bottom of the screen.
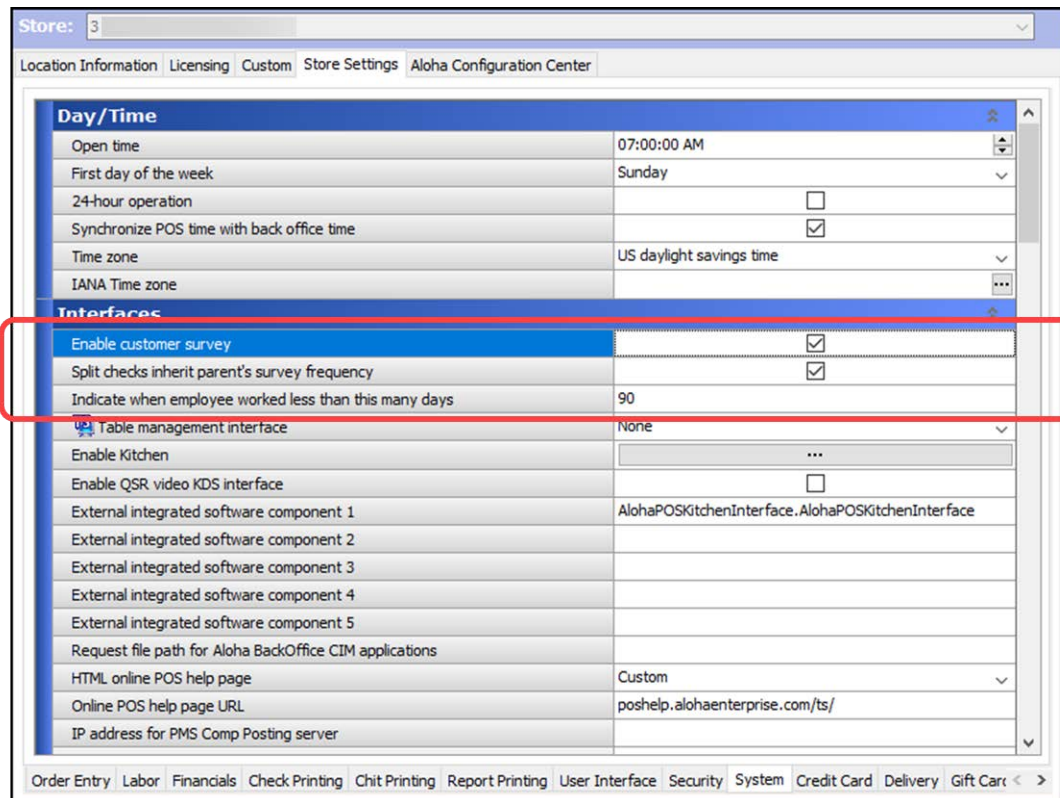
Figure 2 Store Settings Tab - System Group

4. Under the 'Interfaces' group bar, select **Enable customer survey** to print a customer call-in survey on the guest check. A custom banner and message print on each guest check. The banner prints directly below the check header information and above the menu items. The message prints after the menu items and before the first subtotal line.
5. Select **Split checks inherit parent's survey frequency** to allow the survey to print for each customer on a split check.

6. Type the **number of days** at which you consider the employee experienced in the 'Indicate when employee worked less than this many days' text box. This option defines the number of days at which you consider an employee to be experienced and trained, based on the date of business of the restaurant against the hire date of the employee. Entering the default value of 0 days indicates all employees are considered experienced.

7. Click **Save** and exit the **Store** function.

Defining the customer survey requirements

You must define the dates the survey is valid, the frequency the survey prints by day part, and if a survey code prints as a reference. Additionally, you can define if the survey prints on guest checks for bartenders or cocktail waitresses.

You can configure the system to provide a unique survey ID code on the guest check, to prevent fraud. The tenth survey digit, which is available for each of the survey codes, is used to indicate if the employee is considered new or experienced, based on the current date of business against the hire date of the employee, and the number specified in 'Indicate when employee worked less than this many days' in the Store function.

> 💡 **Tip**
>
> If you are using a store unit number with five digits, you must use a 16 or 20-digit survey code. If you have more than nine terminals in your network, you must use a 20-digit survey code.

The following chart details each digit of the code and its usage, for a 10, 15, 16, and 20 digit ID code in use:

Digit Position	10-Digit Usage	15 Digit Usage	16 Digit Usage	20 Digit Usage
First	Digit 4 of the unit number	Digit 5 of check number	Digit 5 of check number	Digit 5 of check number
Second	Digit 2 of the current hour of the DOB	Digit 2 of the current hour of the DOB	Digit 2 of the current hour of the DOB	Digit 2 of the current hour of the DOB
Third	Digit 1 of the unit number	Digit 4 of the unit number	Digit 4 of the unit number	Digit 4 of the unit number
Fourth	Digit 3 of the unit number	Digit 4 of the check number	Digit 4 of the check number	Digit 4 of the check number
Fifth	Digit 2 of the current month of the DOB	Digit 2 of the unit number	Digit 2 of the unit number	Digit 2 of the unit number
Sixth	Digit 2 of the unit number	Digit 2 of the month of the DOB	Digit 2 of the month of the DOB	Digit 2 of the month of the DOB

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Digit Position	10-Digit Usage	15 Digit Usage	16 Digit Usage	20 Digit Usage
Seventh	Digit 2 of the current date of business	Digit 3 of the check number	Digit 3 of the check number	Digit 3 of the check number.
Eighth	Digit 1 of the current date of business	Digit 1 of the unit number	Digit 1 of the unit number	Digit 1 of the unit number
Ninth	Digit 1 of the current hour of the DOB	Digit 2 of the check number	Digit 2 of the check number	Digit 2 of the check number
Tenth	Combines the first digit of the current month with the experience level of the employee: 0 indicates the first digit of months January to September and the employee has been with the company less than the defined number of days. 1 indicates the first digit of the months October to December and the employee has been with the company less than the defined number of days. 2 indicates the first digit of the months January to September and the employee has been with the company longer than the defined number of days. 3 indicates the first digit of the months October to December and the employee has been with the company longer than the defined number of days.			
Eleventh	NA	Digit 2 of the current date of business	Digit 2 of the current date of business	Digit 2 of the current date of business
Twelfth	NA	Digit 3 of the unit number	Digit 3 of the unit number	Digit 3 of the unit number
Thirteenth	NA	Digit 1 of the current date of business	Digit 1 of the current date of business	Digit 1 of the current date of business
Fourteenth	NA	Digit 1 of the current hour of the DOB	Digit 1 of the current hour of the DOB	Digit 1 of the current hour of the DOB
Fifteenth	NA	Digit 1 of the check number + 1	Digit 1 of the check number + 1	Digit 1 of the check number

Digit Position	10-Digit Usage	15 Digit Usage	16 Digit Usage	20 Digit Usage
Sixteenth	NA	NA	Digit 5 of the unit number	Digit 5 of the unit number
Seventeenth	NA	NA	NA	Digit 7 of the check number
Eighteenth	NA	NA	NA	Digit 6 of the unit number
Nineteenth	NA	NA	NA	Randomized and does not display actual data
Twentieth	NA	NA	NA	Digit 6 of the check number

> **Tip**
>
> In all instances, when referring to the month and date, the number is based on the date of business, not the calendar date.

For example, when using a 10-digit survey code, a survey code of '191 427 610 0' reflects the following specifics, at the time it is printed:

Unit Number	1	7	4	1
Current Hour When Closed	0	9		
Current Date	1	6		
Current Month	0	2		
Employee is considered inexperienced.				

When using a 16-digit survey code, a survey code of '510 418 312 280 012 0' reflects the following specifics, at the time it is printed:

Check Number	1	2	3	4	5
Unit Number	1	1	0	0	0
Current Hour When Closed	1	1			
Current Date	0	8			
Current Month	0	8			
Employee is considered experienced.					

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When using a 20-digit survey code, a survey code of '510 414 312 280 212 035 68' reflects the following specifics, at the time it is printed:

Check Number	2	2	3	4	5	8	3
Unit Number	1	1	0	0	0	5	
Current Hour When Closed	1	1					
Current Date	2	8					
Current Month	0	4					
Employee is considered experienced.							

To define the Customer Survey requirements:

1. Select **Maintenance > Messaging > Survey**.
2. Select an **existing survey**, or click **New** and accept the **system assigned number** or click the **ellipsis (…)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.
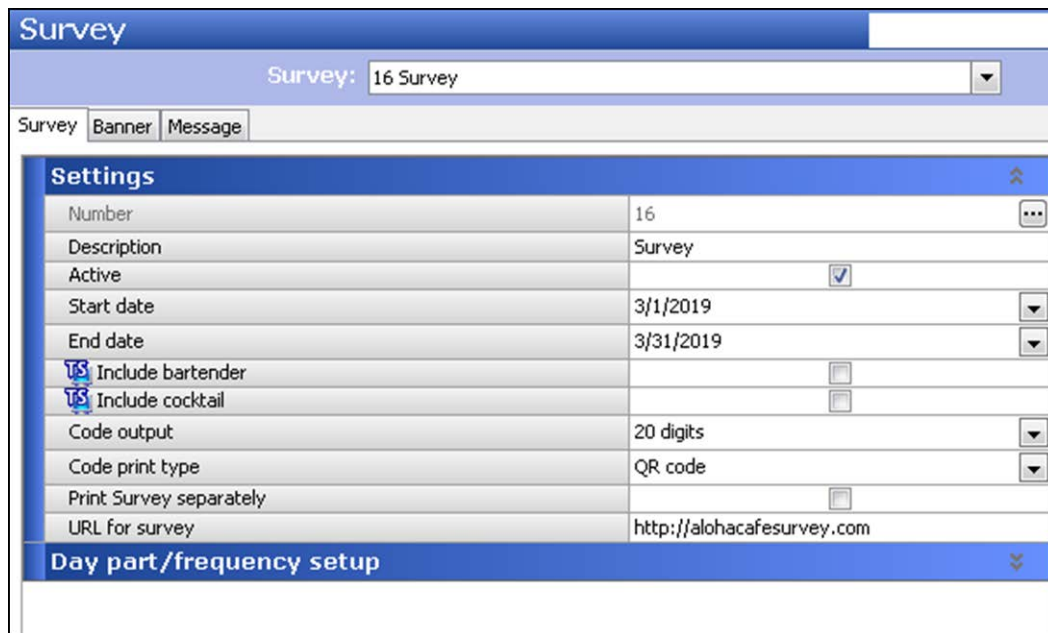
Figure 3 Survey - Settings Group Bar

3. Under the 'Settings' group bar, type a **description** to identify the survey, if needed.
4. Select **Active** to activate the survey, if needed. The survey begins printing after the next End-of-Day.
5. Type the **date** to begin printing the survey on the guest check, if needed.

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6. Type the **date** to end and stop printing the survey on the guest check, if needed.

7. For Table Service operations, select **Include Bartender** to include in the survey those employees who are clocked in under a job code with 'Bartender' selected.

8. For Table Service operations, select **Include Cocktail** to include in the survey those employees who are clocked in under a job code with Tabs or Tables and Tabs selected as the 'Check type.'

9. Select **ONE** of the following options from the 'Code Output' drop-down list.

   No Code — Suppresses the printing of a code number with the survey.

   10 Digit — Prints a unique 10-digit code on the guest check. This code contains the unit number, current hour the check is closed, current date, and the current month.

   15 Digit — Prints a unique 15-digit code on the guest check. This code contains the guest check number, unit number, current hour the check is closed, current date, and the current month.

   16 Digit — Prints a unique 16-digit code on the guest check for restaurants utilizing five-digit unit numbers. This code contains the guest check number, unit number, current hour the check is closed, current date, and the current month.

   20 Digit — Prints a unique 20-digit code on the guest check. This code contains the guest check number, unit number, current hour the check is closed, current date, and the current month.

   Custom 1 — Enter only at the specific request of your NCR Voyix representative.

10. Select **one** of the following options to designate the method by which your guests access customer surveys from the 'Code print type' drop-down list.

    Text — Displays the unique code as numeric. Your guest calls the phone number you provide and enters this unique code to access your survey.

    Barcode — Displays the code as a machine-readable optical label, represented by varying widths and spaces of parallel lines that contains information about your website. Your guest scans the bar code using a smart phone or tablet to access your website or app.

    QR code — Displays the code as black squares arranged in a square grid on a white background. Your guest scans the QR code using a smart phone or tablet to access your website or app.

11. Select **Print Survey Separately** to print the survey on a separate chit following the guest check.

The survey always prints when the frequency is met, even if you configure the guest check not to print for a transaction. The following table describes how the survey prints for four possible scenarios:

If 'Survey Printing Separately' option is:	And 'Guest Check printing' is:	Then the system prints a slip for:
Selected	Configured	The guest check, followed by a slip for the survey.
Selected	Not configured	Only the survey.
Cleared	Configured	The guest check with the survey embedded.
Cleared	Not configured	Only for the survey.

12. Type the website address to embed in the survey QR code in 'URL,' if using a 'Code print type' of QR code.

Figure 4 Day Part/Frequency Setup

13. Under the 'Day part/frequency setup' group bar, select up to four **day parts** and then type the **frequency** in which the survey prints for the corresponding day part, based on the number of guest checks.

   -OR-

Select All from 'Day part 1' to ensure the survey prints for all day parts. Selecting All hides 'Day part 2' through 'Day part 4' and 'Frequency 2' through 'Frequency 4.'

Figure 5 Survey Function

-OR-

Select **None** from 'Day part 1' to deactivate the survey.

14. Click **Save** and continue with the **next procedure**.

Defining the introductory text

You can define the text to print and draw the attention of the guest to the survey. This text is called the banner, and it prints before the line item information. Use the 'Banner 1' through 'Banner 10' text boxes successively to type the text for the banner.

To define the introductory text to print:

1. With the Surveys function still open, select the **Banner** tab to create the first lines a customer sees in the survey. The tab has the same appearance in Quick Service and Table Service.

Figure 6 Survey Banner Tab

2. Type the **text to print on the guest checks** to introduce the customer survey using the 10 'Banner' text boxes. Enter the text beginning in 'Banner Text 1' and continue in sequence until you finish the text.
3. Click **Save** and continue with the **next procedure**.

Defining the instructional text for completing the survey

You must define the text to instruct your guests how to complete the survey. This text is called the message, and it prints after the line item information and before the first subtotal line.

The survey supports keywords, for inserting additional or dynamic information into the instructional text. For example, if you insert <ADRF> in your message and you move to a different location, the system automatically updates the address and you do not have to modify your message.

Keyword	Description
@	Prints the ending time for the guest to take the survey on a single line of the guest check. To find the ending time, the system calculates 72 hours after the survey prints. This keyword must be placed by itself on a 'Message text x' text box.
^	Prints the survey ID code on a single line of the guest check. This keyword must be placed by itself on a 'Message text x' text box.
<DOB>	Prints the date of business. This keyword is also supported in the banner text.
<UID>	Prints the store number, as defined on the Location Information tab in the Store function. This keyword is also supported in the banner text.
<NAME>	Prints the store name, as defined on the Location Information tab in the Store function. This keyword is also supported in the banner text.
<ADRF>	Prints the 'Address 1,' as defined on the Location Information tab in the Store function. This keyword is also supported in the banner text.
<ADRS>	Prints the 'Address 2,' as defined on the Location Information tab in the Store function. This keyword is also supported in the banner text.
<PHNF>	Prints the 'Telephone number 1,' as defined on the Location Information tab in the Store function. This keyword is also supported in the banner text.
<PHNS>	Prints the 'Telephone number 2,' as defined on the Location Information tab in the Store function. This keyword is also supported in the banner text.

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To define the instructional text to print:

1. With the Surveys function still open, select the **Message** tab. The tab has the same appearance in Quick Service and Table Service.

Figure 7 Survey Message Tab

2. Type the **text to print on the guest checks** to provide instruction to your guests for completing the survey using the 40 'Message' text boxes. Enter the message starting in 'Message text 1' and continue in sequence until you finish the message.

3. Click **Save.**

4. Click **Close** to exit the **Survey** function.

Suppressing the pipe characters on the customer survey

On the printed receipt, the survey code is framed by a beginning and ending pipe character. This is sometimes perceived as the number 'one' and reflects an incorrect survey code. In v6.1.15, v6.2.8, v6.3.4, v6.4.0, and later, you can now suppress the pipe characters from printing by adding the NoSurveyPipe=True variable to the Store function.

To add the NoSurveyPipe variable to the Store function:

1. Select **Maintenance > Business > Store**.
2. Select the **Custom** tab.
3. Click **Add**.
4. Type **NoSurveyPipe** in the 'Setting name' text box.
5. Type **True** in the corresponding 'Value' text box.
6. Click **Save**.
7. Click **Close** to exit the **Store** function.

Providing the ability to reprint a customer survey

The customer survey prints with the check only once, by default. Effective in v6.7.53 and v12.3.20, you can now print the survey each time you reprint the check, by adding the ReprintSurvey=True variable to the Store function. Each print instance is considered in the frequency interval defined for the customer survey.

To add the ReprintSurvey variable to the Store function:

1. Select **Maintenance > Business > Store**.
2. Select the **Custom** tab.
3. Click **Add**.
4. Type **ReprintSurvey** in the 'Setting name' text box.
5. Type **True** in the corresponding 'Value' text box.
6. Click **Save**.
7. Click **Close** to exit the **Store** function.

Refreshing the data

After all settings are in place in Aloha Manager, it is necessary to select Utilities > Refresh All POS Data to transfer the new information to the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. If you run the refresh prior to the EOD process, select 'Automatically restart all POS terminals' and click OK to continue. After the data refresh is complete, all new settings become operational across the Aloha network.

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

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Using Customer Survey

The following guest check examples detail the three different types of code output: text, bar code, and QR code.
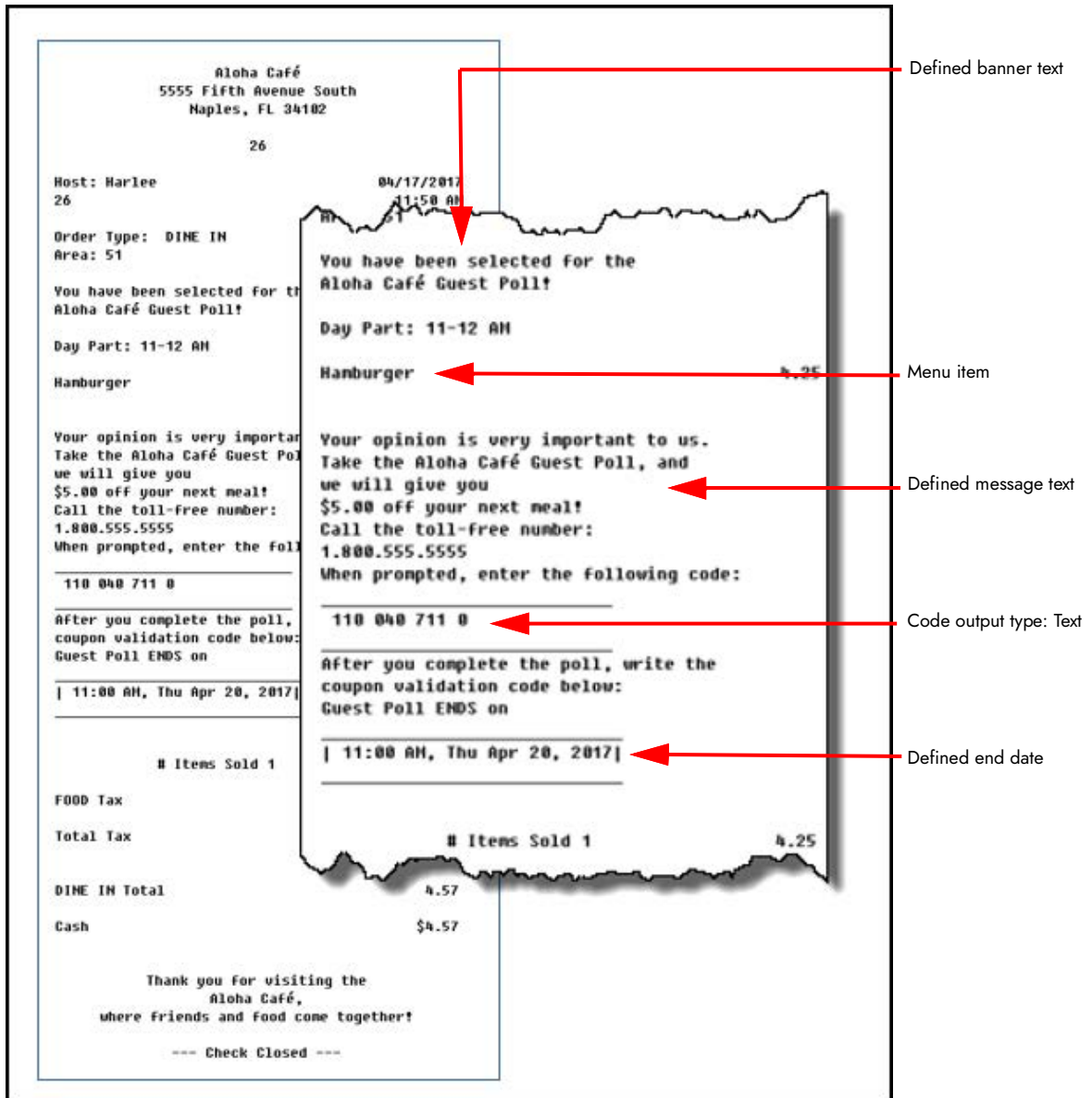
Figure 8 Code Output Type: Text

Figure 9 Code Output Type: Bar Code

Figure 10 Code Output Type: QR Code

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NCR Voyix welcomes your feedback on this document. Your comments can be of great value in helping us improve our information products. Please contact us using the following email address: Documentation.HSR@NCRVoyix.com