Feature Focus Guide: Interactive Messages

Core Product: Aloha Quick Service, Aloha Table Service Last Updated: June 13, 2024

Contents

About Interactive Messages	4
Configuring Interactive Messages	6
Providing access to interactive messages	6
Allowing employee access to approve message responses	8
Creating a labor reporting group	9
Creating an interactive message	10
Refreshing the data	12
Jsing Interactive Messages	13
Reporting Interactive Messages	17
Froubleshooting Interactive Messages	21

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Revision Record

Date	Version #	Description
Prior to	v6.5+	Implemented the Interactive Messages feature.
12/15/2022	v17.1	Updated document to reflect Aloha Configuration Center and Aloha Manager.
12/15/2022		Converted the document to use new templates.
01/12/2023		Updated front cover and back page to reflect new NCR branding.
06/13/2024		Updated document to reflect NCR Voyix branding.



About Interactive Messages

Interactive Messages at a Glance	
Core Product	Aloha [®] Quick Service, Aloha Table Service
Complementary Products	No
Separate License Required?	No
Other References	Aloha Quick Service Manager Guide, Aloha Quick Service Reference Guide, Aloha Table Service Manager Guide, Aloha Table Service Reference Guide

The Interactive Messages feature provides a tool for managers to communicate with an employee, or a group of employees, via the Aloha Point-of-Sale (POS) system without any face-to-face contact. A message can appear when an employee clocks in or clocks out, depending on your need. We recommend you word the message in the form of a question where the employee can respond in a 'yes' or 'no' fashion. A 'yes' response would not require immediate attention; however, a 'no' response alerts a manager via a notification chit or requires manager approval to continue. You can also enter text in foreign languages directed to non- English speaking employees. The following are examples of how you might use an interactive message:

- A daily message assigned to all tipped employees in strict labor jurisdictions regarding employee breaks, such as "I declare under penalty of perjury that today I have received my allotment of breaks."
- A one-time message assigned to a specific employee regarding a schedule change, such as "Mary called in sick and I need you to close tonight. If you cannot, please click No."
- A one-time message assigned to the kitchen staff regarding chef jackets, such as "Have you received your chef jacket yet?"
- A daily message assigned to the support staff regarding tipshare, such as "Have you received your tipout from last night?"
- A one-time message assigned to all employees regarding the company picnic, such as "Can you attend the company picnic?"

Additionally, driven by recent legislature, restaurants need the ability to capture information from the employee at the time they return from a meal period in order to demonstrate that they are voluntarily choosing to return early. Also, if the employee returns early, restaurants would like the opportunity to discuss or validate the early return for the employee, which can be accomplished by requiring a manager approval at the point the employee returns from break. We have enhanced the existing



break rule functionality to include additional settings within the break rules function to select customized messages and manager required for yes or no response.



Reference

Refer to the <u>Employee Breaks Feature Focus Guide - HKS315</u> for detailed information regarding interactive messages, employee breaks, and early returns from enforced breaks.



Configuring Interactive Messages

This section details the configuration requirements within Aloha Manager and Aloha Configuration Center (CFC) for Interactive Messages. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Interactive Messages Procedures at a Glance:

If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.

1.	Select Maintenance > Labor > Security Roles to provide access to the interactive messages feature. See <u>page 6</u> .
2.	Select Maintenance > Labor > Pos Access Levels to allow employee access to approve message responses. See <u>page 8</u> .
3.	Select Maintenance > Labor > Labor Groups to assign an interactive message to multiple job codes. See page 9
4.	Select Maintenance > Messaging > Interactive Messages to create an interactive message. See page 10.
5.	Select Maintenance > Messaging > Interactive Messages to delete an interactive message. See page 12.
6.	Select Utilities > Refresh POS & All Products to refresh the data. See page 12.

Providing access to interactive messages

To use the Interactive Messages feature, you must have a sufficient security level to access the Interactive Messages feature. If your security role does not include access to Interactive Message Response, the option does not appear when you log in to the Back-of-House (BOH).

To provide access to the interactive messages feature:

- 1. Select Maintenance > Labor > Security Roles.
- 2. Select a security role from the drop-down list.



3. Select the **POS** tab.

S	ecurity Roles					
	Security Role: 100 Manager				-	
Sec	curity Role Aloha Manager POS EDC Takeout Kitchen Al	ert				
	Icon Function	View	Edit	Add	Delete	1
	▼ File					U
	Functions					
	▶ Export					
	▶ IC Verify					
	 Reports 					
	▶ Sales					
	Hourly Sales and Labor					
	 Employee 					
	Labor	\checkmark				
	Scheduled vs. Actual Labor	\checkmark				
	Employee Break	\checkmark				
	Overtime Warning					
	Overtime Forecast	\checkmark				
	Interactive Message Response	\checkmark	\checkmark			
	Tip Income					
	Employee Tip					-

Figure 1 Security Roles

- 4. Under the 'Reports > Employee' group bar, select **View** and **Edit** for Interactive Message Response, where applicable.
- 5. Click Save.
- 6. Repeat this **procedure** for any other security roles requiring access to break rules.
- 7. Exit the Security Roles function.



Allowing employee access to approve message responses

You can configure interactive messages to require manager approval of a 'No' response when an employee clocks in, clocks out, or returns early from an enforced break. Approval of this function is controlled by the access level under which the employee clocks in.

To allow employees access to approve message responses:

- 1. Select Maintenance > Labor > Pos Access Levels.
- 2. Select the access level, such as a manager, from the drop-down list.

Pos Access Levels				
POS Access Level: 2 Manager	POS Access Level: 2 Manager			
Access Level				
🗉 Financial		·		
Employee				
Approve clock in	V			
Approve checkout	¥			
Delete checkout	V			
Approve clock out	V			
Delete clock out	¥			
Approve start/end breaks	V			
Clear password	V			
Enroll fingerprints	✓			
Force reconciliation				
Force coupon audit				
Open any drawer	\checkmark			
😳 De-assign drawers	V			
😳 Enter open items	V			
Access quick count screens and reports	\checkmark			
Enter pay adjustments	✓			
🛯 🖉 Adjust tip share	\checkmark			
Release locked employee	V			
Edit FOH labor	V			
Assign pen ID's	\checkmark			
Approve interactive message response	V			
System		-		



- 3. Under the 'Employee' group bar, select **Approve interactive message response** to enable all employees using this access level to approve interactive message that require manager approval to continue with a clock in, clock out, or early return from enforced break function.
- 4. Click Save.
- 5. Repeat this **procedure** for each access level allowed to approve an interactive message response.
- 6. Exit the **Pos Access Levels** function.



Creating a labor reporting group

In the Labor Group function, you can group multiple job codes together for either labor reporting or for job code groupings. Labor groups designed for reporting appear on reports to determine your labor hours and dollars, and labor groups designed for job code groupings are used for logical assignments for other functions, such as interactive messages. In the Interactive Messages function, you can use either type of labor group; however, you may want to create and use labor groups designed for job code groupings so these group s do not clutter reports and cause confusion.

When you create an interactive message, the system offers the capability to assign the message to multiple job codes. This is helpful when you have a message that must be dispersed amongst a large number of staff.

To group job codes to assign message to multiple job codes:

- 1. Select Maintenance > Labor > Labor Groups.
- 2. Click the New drop-down arrow, select Labor Reporting, and click OK.
- 3. Type a **name** to identify th group job codes.
- 4. Select the **Jobcodes** tab.

Labor Groups					
La	bor Group: <mark>2 Staff</mark>				•
Labor Group Categories	Jobcodes				
Job Codes					
Available			Included		
Drag a column header here	e to group by that	•	Drag a column header here	to gro	oup by that column
Number 🛆	Name		Number	Δ	Vame
▶ 1	Server old		Þ	44 E	Bartender
2	Manager			48 5	Server
3	Supervisor -	-		49 E	Busser
4	Training				
5	BEC				
6	Line	<<			
7	Kitchen				
8	Cashier				
9	D Driver				
10	Dispatch				
11	VideoTests				
12	VidTests2 ,	-			

Figure 3 Labor Groups

- 5. Select the **job code** from the 'Available' list and click >> to move it to the 'Included' list.
- 6. Repeat **step 5** until you select all job codes for this labor group.
- 7. Click Save.
- 8. Repeat this **procedure** for any other labor groups you want to create.
- 9. Exit the Labor Groups function.



Creating an interactive message

Use the Interactive Messages function to create the message to send to your employees. You can configure the message tow appear when the employee clocks in, clocks out, or returns early from an enforced break, depending upon your need. We recommend you word the message in the form of a question where the employee can respond in a 'yes' or 'no' fashion, with a 'no' response requiring immediate attention or feedback. You can also enter text in a foreign language directed to non-English speaking employees.

To create an interactive message:

- 1. Select Maintenance > Messaging > Interactive Messages.
- 2. Click the New drop-down arrow, select either Clock In, Clock Out, or Early Return from Enforced Break, and click OK.
- 3. 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**.

T.	atoractivo Moccador		
1	nieracuve messages		
	Interactive Messages: 1 Offsite Event		r
In	teractive Message Employees Printers		
-	Settings		-
	Number	1	•••
	Name	Offsite Event	
	Туре	Clock In	-
	Labor group	Staff	•
	Manager approval needed when response to message is	Yes	•
-	Text		
	Line 1	Are you available to work the	
	Line 2	Paradise Coast Wine & Food Experience	
	Line 3	this year?	
	Line 4		
	Line 5	Naples is expecting a great crowd this year!	
	Line 6		
	Line 7		
	Line 8		
	Line 9		
	Line 10		
	Line 11		
	Line 12		
	Line 13		
	Line 14		-

Figure 4 Interactive Messages

- 4. Type a **name** to identify the interactive message.
- 5. Select a **labor group** from the drop-down list, if you wish to send the interactive message to a lot of employees, such as the entire kitchen staff.
- 6. Select either **No**, **Yes**, or **Yes or No** to require manager approval before the employee can continue with the clock in or clock out process.
- 7. Type the **text** of the message to appear in line 1 through line 15.



8. If your message is directed to only one employee, select the **Employees** tab.

Interactive	Messages			
Interact		1	Offsite Event	
Interactive Message	Employees Printe	rs		
Employees				
Available				Included
Drag a column heade	r here to group by			Drag a column header here to group by that column
Number 🛆	Name			Number Δ Name
142	Cabot, Alexandra	-		▶ 148 Amaro, Nick
143	Collins, Tom			
144	Rollins, Amanda			
145	Barba, Rafael			
146	Stabler, Elliot		>>	
147	Tutuola, Finn		<<	
149	Lake, Chester			
150	Castle, Alexis			
151	Exposito, Javier			
152	Ryan, Kevin			
153	Carrington, Alexis			
154	Munch, John	•		

Figure 5 Employees Tab

- 9. Select an **employee** from the 'Available' list and click >> to move the employee to the 'Included' list.
- 10. Select the **Printers** tab.

Interactive	Messages				
Interac	tive Messages: 🚦	Offsite Event			•
Interactive Message	Employees Printers				
🗉 Printing					
Print notification	on to local printer			✓	
Print when res	ponse to message is			Yes or No	•
Notification me	essage			Default	-
Additional pr Available	inters		Included		
Drag a column head	er here to group by		Drag a col	umn header here to group by	that column
Number	∆ Name		Number	∕ ∆ Name	
•	1 WS1 Receipt	>>			
	2 Chipolte Kitchen	<<			
	3 Label Printer				
	4 Chipotle Kitchen 2				
		1			
			Į		

Figure 6 Printers Tab

- 11. Select **Print notification to local printer** to print a notification message for the response.
- 12. Select **No**, **Yes**, or **Yes or No** to designate the required response from the employee for the message to print.



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- 13. Select the **Notification message** to specify the content to print in the message.
- 14. Click Save.
- 15. Repeat this **procedure** for any other interactive message you want to create.
- 16. Exit the Interactive Messages function.

To delete an interactive message:

- 1. Select Maintenance > Messaging > Interactive Messages.
- 2. Select the **message** from the drop-down list.
- 3. Click **Delete**. A confirmation message appears.
- 4. Click Yes and exit the Interactive Messages function.

Refreshing the data

After all settings are in place in Aloha Manager, you must select Utilities > POS > Refresh POS & All Installed Products to transfer the new information to the Front-of-House (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.

A 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.



Using Interactive Messages

When you receive an interactive message at clock in or clock out, you must answer with a 'yes' or 'no' response. A 'no' response could alert the manager and require manager approval before allowing you to continue. If you give a 'no' response to multiple interactive messages, the manager approval screen appears only once after you acknowledge all messages.

To use an interactive message:

1. Log in to the Front-of-House (FOH).

If you are clocking in, the FOH Clock In screen appears. Select the **job code** for which you will work and touch **Clock In**.

If you are clocking out, touch **Clock Out** to display the Clock Out screen. Touch **Clock Out** again to complete the clock out.

The interactive message appears.





🖪 Note

Depending upon the system, you may need to perform several functions during the process, such as performing a checkout, declaring your tips, contributing in a tip-share pool, viewing a clock in movie, or respond to other on-screen messages, such as a waive break message, a clock in message, or a birthday message.



2. Select **Yes** to answer 'Yes' to the message and end the procedure. -OR-

Select **No** to answer 'No' to the message and continue with the procedure. If the system is configured for manager approval, the manager approval screen appears.



Figure 8 Manager Approval Screen



3. If necessary, touch **View** to view the name of the interactive message.

	Interactive Message Response
Offsite Event	
	οκ
	Offsite Event

Figure 9 Interactive Message Response Screen

- 4. Touch **OK** to return to the Manager Approval screen.
- 5. A manager, or an employee with similar access, must enter their **password** to continue with the clock in or clock out.



Tip

If a manager is clocking you out using the Clock Out button on the Edit Clock In/Out screen, or you are still on the clock when End-of-Day (EOD) occurs, interactive messages do not appear for any subsequent clock in functions.



A notification chit for the manager may print to a local printer.

Interactive Mess	age Notification
	08/18/17 14:31
TERM: EMPLOYEE ID: SHIFT #: ATTEMPT: MESSAGE: RESPONSE:	SERVER STAT #1 Chester Lake 149 1 1 0 0 0 0 ffsite Event VFS

Figure 10 Interactive Message Notification Chit



Reporting Interactive Messages

Use the Interactive Message Response report to view the responses received from each employee.

To run the interactive message report:

1. Select **Reports > Aloha Point-of-Sale > Employee > Interactive Message Response**. The Interactive Message Response Report dialog box appears.

Select Date	s	
Today 06/21/2017	_	Settings
03/09/2017		
03/08/2017		
03/07/2017		
03/06/2017		
03/03/2017		
03/02/2017		
02/28/2017	_	Export
02/27/2017	-	Settings



- 2. Select a single date, or a range of dates, from the selection list.
- 3. Click Settings. The Interactive Message Response Report Settings dialog box appears.

Sort By	
Employee ID	
C Employee Last Name	
C Job Code	
C Message ID	
C Date	
C Message Response	
Save	Cancel

Figure 12 Interactive Message Response Report Settings Dialog Box

- 4. Select either Employee ID, Employee Last Name, Job Code, Message ID, Date, or Message Response to determine the sort order for the report.
- 5. Click **Save**.



6. Click View, Print, or Export to review the report.

Preview Rep 10 - Aloha 5555 Fifth Naples, Fl	ort Café Avenue South Iorida 34102	Interac	ti∨e N	lessage 08/21/2	Response Report	Printed by	Page 1 of 1 08/21/2017 2:43 PM 15:30eu : Seeded Administrator
Emp #	Employee name	Date	<u>Time</u>	Message ID	Message Name	Response	Manager
145 145	Barba, Rafael Barba, Rafael	08/21/2017 08/21/2017	14:41 14:41	001 002	Offsite Event New Uniforms	Y N	
147	Tutuola, Finn	08/21/2017	16:45	001	Offsite Event	Y	
148	Amaro, Nick	08/21/2017	17:15	001	Offsite Event	N	
149	Lake, Chester	08/21/2017	17:16	001	Offsite Event	Y	
		*************	******	** End of R	eport ************************************		
							Þ
	Page 1 of 1	Close	Print	Page 🥩	08/21/2017 2:43 PM 140%		

Figure 13 Interactive Message Response Report - Employee ID Example

		4102 Uor / 1/2017 with Printed by: Seeded Administr					
Emp#	Employee name	Date	Time	Message ID	Message Name	Response	Manager
148	Amaro, Nick	08/21/2017	17:15	001	Offsite Event	N	
145 145	Barba, Rafael Barba, Rafael	08/21/2017 08/21/2017	14:41 14:41	001 002	Offsite Event New Uniforms	Y N	
149	Lake, Chester	08/21/2017	17:16	001	Offsite Event	Y	
147	Tutuola, Finn	08/21/2017	16:45	001	Offsite Event	Y	
		**********		*** End of R	eport ************************************	****	

Figure 14 Interactive Message Response Report - Employee Last Name Example



5555 Fifth Naples, F	Avenue South Iorida 34102	Interac	tive iv	08/21/2	2017	08/21/2017	2:45 Pl 16:100 ministrate
Emp #	Employee name	Date	Time	Message ID	Message Name	Response Manager	
Jobcoo	le Bar Upstairs						
145 145	Barba, Rafael Barba, Rafael	08/21/2017 08/21/2017	14:41 14:41	001 002	Offsite Event New Uniforms	Y N	
Jobcoo	le Server Upstairs						
147 148 149	Tutuola, Finn Amaro, Nick Lake, Chester	08/21/2017 08/21/2017 08/21/2017	16:45 17:15 17:16	001 001 001	Offsite Event Offsite Event Offsite Event	Y N Y	
		******	*******	*** End of R	eport ************************		

Figure 15 Interactive Message Response Report - Job Code Example

💶 Preview Repo	rt						_	
10 - Aloha 5555 Fifth J Naples, Flo	Café Avenue South Irida 34102	Interac	ti∨e N	lessage 08/21/2	Response Report	Printed by	Page 1 of 08/21/2017 2:46 I 16:10 r: Seeded Administra	f 1 PM Des ator
Emp#	Employee name	Date	<u>Time</u>	Message ID	Message Name	Response	Manager	
145 147 148 149	Barba, Rafael Tutuola, Finn Amaro, Nick Lake, Chester	08/21/2017 08/21/2017 08/21/2017 08/21/2017 08/21/2017	14:41 16:45 17:15 17:16	001 001 001 001	Offsite Event Offsite Event Offsite Event Offsite Event	Y Y N Y		
145	Barba, Rafael	08/21/2017	14:41	002	New Uniforms	N		
		**************	******	** End of R	eport ************************************			
								۰ľ
	Page 1 of 1	Close	Print	Page 🥩	08/21/2017 2:46 PM 140%			_

Figure 16 Interactive Message Response Report - Message ID Example

10 - Aloha (5555 Fifth / Naples, Flo	Café Wenue South rrida 34102	Interact	ive N	1essage 08/21/2	Response Report	Printed by	Page 1 of 1 08/21/2017 2:46 PM 16:10 Dea : Seeded Administrator
Emp# 145 147 148 149 145	Employee name Barba, Rafael Tutuola, Finn Amaro, Nick Lake, Chester Barba, Rafael	Date 08/21/2017 08/21/2017 08/21/2017 08/21/2017 08/21/2017	Time 14:41 16:45 17:15 17:16 14:41	Message ID 001 001 001 001 002	Message Name Offsite Event Offsite Event Offsite Event Offsite Event New Uniforms	Response Y Y N Y N	Manager
1		******	*******	*** End of R	eport ************************************	*	Þ
	Page 1 of 1	Close	Print	Page 💰	08/21/2017 2:47 PM 140%		





5555 Fifth Naples, Fi	Avenue South Iorida 34102			08/21/2	2017	Printed by	08/21/2017 2:47 16: Seeded Administ
Emp #	Employee name	Date	Time	Message ID	Message Name	Response	Manager
148 145	Amaro, Nick Barba, Rafael	08/21/2017 08/21/2017	17:15 14:41	001 002	Offsite Event New Uniforms	N	
147 149 145	Tutuola, Finn Lake, Chester Barba, Rafael	08/21/2017 08/21/2017 08/21/2017	16:45 17:16 14:41	001 001 001	Offsite Event Offsite Event Offsite Event	Y Y Y	
		******		*** End of R	eport ************************************	******	

Figure 18 Interactive Message Response Report - Message Response Example

- 7. Click **Close** to close the report.
- 8. Click **Close** to close the Interactive Message Response dialog box.



Troubleshooting Interactive Messages

If you attempt to add more than one employee from the 'Available' list on the Employees tab in Maintenance > Messaging > Interactive Messages, the following error message 'Employee {last name, first name] may not be assigned to the included list, as it would exceed the limit of 1 per store.'



Figure 19 Exceeding the Limit

Click OK to close the error message.



Interactive Messages, Feature Focus Guide

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

