

# Feature Focus Guide:

# Context Panels

Core Product: Aloha Quick Service  
Last Updated: June 7, 2024

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## Revision Record

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	QS v14.2	Updated document to reflect CFC and new Aloha Manager
01/11/2023		Converted document to use new templates and updated front cover and back page to reflect new NCR branding.
07/10/2023		Updated document with new copyright verbiage.
06/07/2024		Updated document to reflect NCR Voyix branding.

## About Context Panels

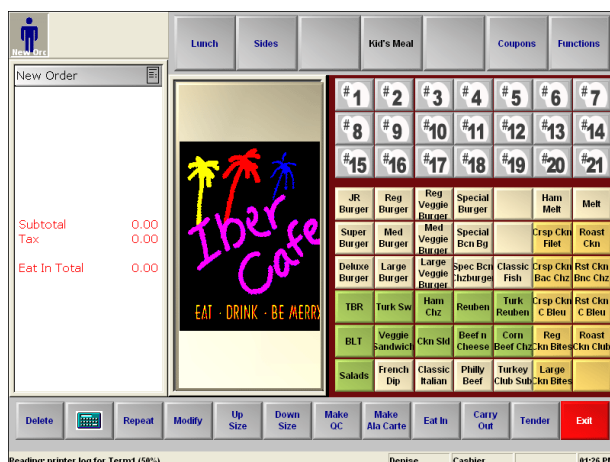
Context Panels at a glance	
Core Product	Aloha Quick Service
Complementary Products	No
Separate License Required?	No
Other References	Aloha Quick Service Reference Guide, Aloha Quick Service Screen Designer Guide

In the current Aloha<sup>®</sup> Quick Service environment, you must force either the 'classic' or 'system-generated' modifier screen to appear, when you add an item to the guest check, to allow guests to make additional selections for the item, or you can script the item button so that it chains to another panel from which you can make additional selections; however, both of these methods require you to respond to the screen prompts as they appear before you can continue entering the order, requiring you to interrupt the guest while they are ordering.

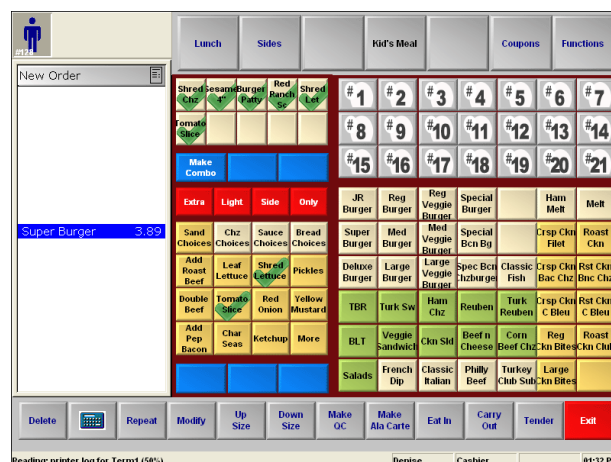
Aloha Quick Service v6.7 introduced a new concept called context panels, from which you can also make additional selections, but context panels appear on the screen at the time you add an item to the guest check, and again if you select the item from the guest check window. This allows you to make additional selections right then, or you can let the guest continue placing their order without interruption, and address their selections on demand later in the order entry process. Simply select the item requiring additional selections from the guest check window and the associated context panel reappears on the screen, allowing you to enter guest selections at your convenience.

As a best practice, we recommend reserving an area, such as the center of the screen, for displaying your context panels. Each time you select an item with an associated context panel, the new context

panel replaces the prior context panel, allowing you to make selections for the currently selected item.



In this example, a panel containing the store logo appears in the area reserved for context panels, when the area is not occupied by a context panel.



When you touch a menu item, such as Super Burger, the context panel associated with Super Burger appears in the reserved area of the screen.

Figure 1 Basic Example of a Context Panel for an Item

As with any panel you create, panels must never partially overlap another panel. Each panel must cover edge to edge, or the Aloha Front-of-House (FOH) does not display the overlapped panel.

In this example, the context panel does not appear on the FOH because another panel partially overlaps it.

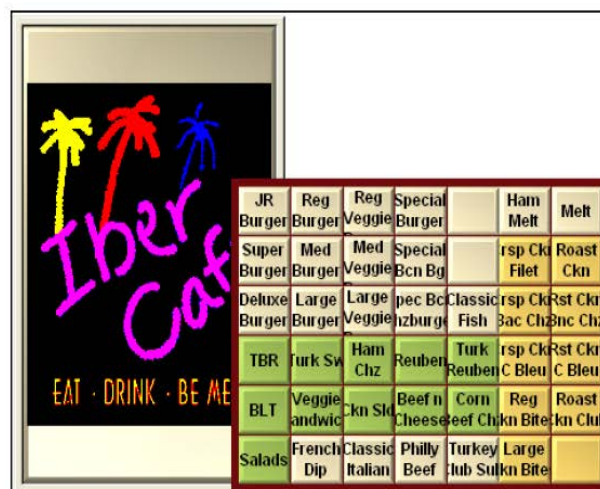


Figure 2 Overlapping Panels

Incorporating context panels into your database allows you to be more flexible when entering guest selections, which reduces errors during order entry and increases customer satisfaction.

You need to analyze your order entry needs and make some determinations before implementing context panels:

- Determine the maximum number of modifiers you allow for any one item or like items.
- Determine how much screen real estate is available for displaying a context panel and how many buttons you can put on a panel of that size.
- You may need to create a context panel for each group of like items, such as sandwich modifiers, item substitutions, pizza toppings, and more.
- If you need to create multiple context panels to accommodate your needs, devise a naming convention so that you can easily identify the appropriate panel when associating it with an item.

Once you complete this analysis, you are ready to begin your configuration.

## **Additional features you can use with context panels**

You can also implement these features in conjunction with context panels:

- Supporting Dynamic Item Substitution
- Supporting Dynamic Included Modifiers
- Substituting Included Modifiers with Context Panels
- Toggling Between Adding and Removing a Modifier

## Configuring Context Panels

For the purposes of this document, we use the concept of reserving an area of your order entry screen for displaying context panels. This allows you to create and size a context panel using the dimensions and number of buttons you need, and then copy it, for consistency across your order entry panels and screens. You also need to create a regular Quick Service panel, to appear in the reserved area immediately upon login, and when you select an item that does not have an associated context panel.

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

### Context Panels at a Glance:

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

- |    |  |
|----|--|
| 1. | Access <b>Maintenance &gt; Business &gt; Additional Features &gt; 'Options to display' group bar &gt; Display Context Panels</b> to expose context panel functions and options in the user interface. See <a href="#">page 8</a> .   |
| 2. | Select <b>Uses context panels</b> under the 'POS Order Entry Check' group bar in the 'User Interface' group located at the bottom of the Store Settings tab in <b>Maintenance &gt; Business &gt; Store</b> to activate the use of context panels. See <a href="#">page 9</a> . |
| 3. | Access <b>Maintenance &gt; Screen Designer &gt; Quick Service Screen Designer</b> to create one or more context panels, depending on your needs. See <a href="#">page 10</a> .   |
| 4. | Access <b>Maintenance &gt; Menu &gt; Items &gt; Display Options tab &gt; 'Context Panel'</b> group bar to associate a context panel with an item or modifier. See <a href="#">page 12</a> .  |
| 5. | Access <b>Maintenance &gt; Payments &gt; Promotions &gt; Quick combo QS</b> tab to associate a context panel with an entire quick combo or to a single quick combo component. See <a href="#">page 14</a> .  |
| 6. | Access <b>Utilities &gt; POS &gt; Refresh POS &amp; All Installed Products</b> to refresh your POS system. See <a href="#">page 15</a> .   |

## Exposing context panels in the user interface

You must expose the functions and options for context panels in the user interface so that you can create context panels and associate them with either a menu item, modifier, or quick combo, including quick combo components.

### To expose context panels in the user interface:

1. Select **Maintenance > Business > Additional Features (AM) or Corporate Administration (CFC)**.

The screenshot shows the 'Corporate Administration' window for '1 Coffee Bean Coffee Bean'. The 'Corporate Owner' tab is selected, and the 'Required Employee Fields' sub-tab is active. A table titled 'Options to display' lists various features with checkboxes. The 'Display Context Panels' option at the bottom is highlighted with a red box and has its checkbox checked.

Name	Coffee Bean
<b>Options to display</b>	
Display Aloha QuickService settings	<input checked="" type="checkbox"/>
Display Aloha TableService settings	<input checked="" type="checkbox"/>
Display cash card	<input type="checkbox"/>
Display Campus Card	<input type="checkbox"/>
Display gift card	<input type="checkbox"/>
Display basic gift certificates	<input checked="" type="checkbox"/>
Display aloha gift certificates	<input type="checkbox"/>
Display quick count	<input type="checkbox"/>
Display VideoMX	<input checked="" type="checkbox"/>
Display property management	<input type="checkbox"/>
Display survey	<input type="checkbox"/>
Display token distribution	<input type="checkbox"/>
Display Aloha Loyalty	<input type="checkbox"/>
Display gold points	<input type="checkbox"/>
Display drink dispenser	<input type="checkbox"/>
Display scales	<input type="checkbox"/>
Display club membership	<input type="checkbox"/>
Display delivery	<input type="checkbox"/>
Display credit card	<input checked="" type="checkbox"/>
Display Air Force	<input type="checkbox"/>
Display Vizor	<input checked="" type="checkbox"/>
Display break rules	<input checked="" type="checkbox"/>
Display Context Panels	<input checked="" type="checkbox"/>

Figure 3 Display Context Panels

2. Under the 'Options to display' group bar, select **Display Context Panels** to activate the use of context panels, allowing you to automatically display a panel, from which you can make additional selections when you select an item, modifier, quick combo, or a quick combo component from another panel or from the guest check window.
3. Click **Save** and exit the **Additional Features** function.



## Activating the use of context panels

After exposing the functions and options in the user interface, you must activate context panels for use in the system.

### To activate the use of context panels:

1. Select **Maintenance > Business > Store**.
2. Select the **Store Settings** tab.
3. Select the **User Interface** group located at the bottom of the screen.

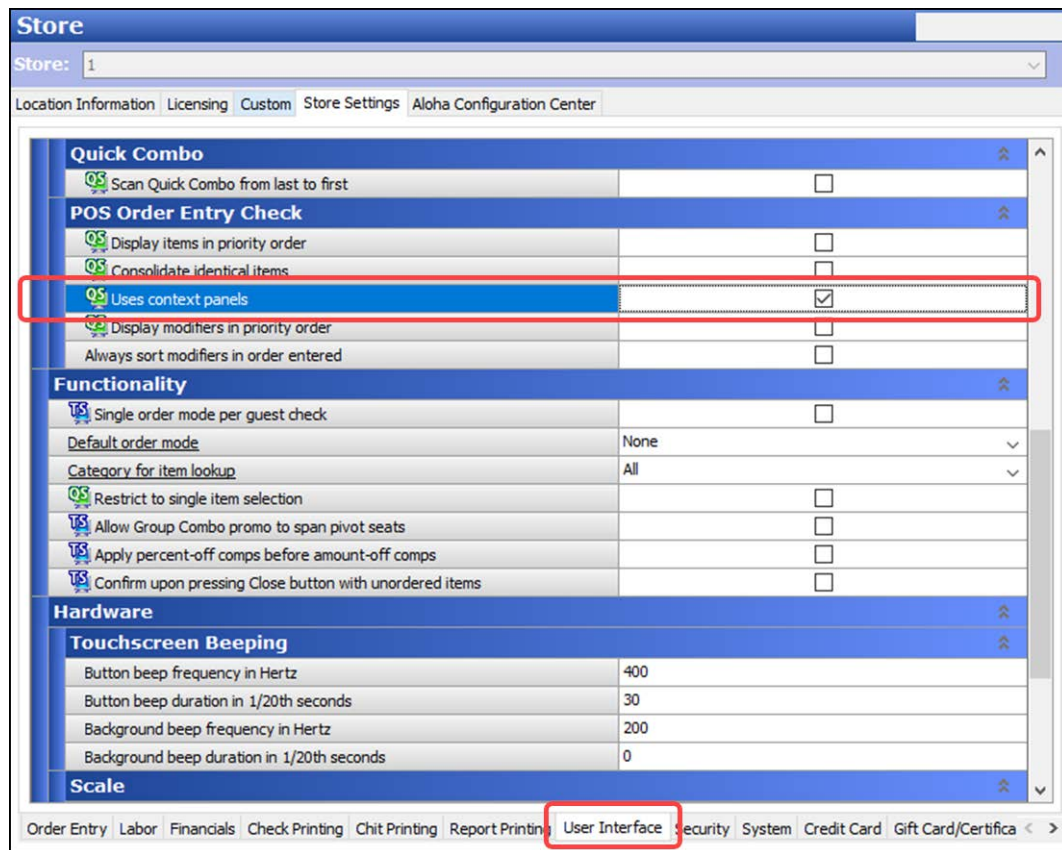


Figure 4 Store Settings > User Interface Tab

4. Under the 'POS Order Entry Check' group bar, select **Uses context panels** to activate the use of context panels, allowing you to automatically display a panel from which you can make additional selections when you select an item, modifier, quick combo, or a quick combo component from another panel or from the guest check window.
5. Click **Save** and exit the **Store** function.

## Creating a context panel

Create one or more context panels in Panel Editor, depending on your needs. You can create one context panel that includes the modifiers for all your items, but most likely, you will create a separate context panel for each group of like items, such as sandwiches, drinks, pizzas, and more.

### To create a context panel:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer**.
2. Select **Work with Panels**.
3. Select **Panel > New Panel**, and size the panel. The 'Properties' dialog box appears.

The screenshot shows the 'Properties' dialog box for a 'Quick Service Panel: 9916 Condiments'. The 'Appearance' group is expanded, showing settings for Title, Font, Title Color, Title Position, Background Color, Image, Hide panel border, Mark as template, Fixed panel position, Fixed button layout, Context panel (checked), Use new panel display, Gradient, Shadow, Bevel, Outline, Scale image, and Style. The 'Identification' group is also expanded, showing settings for Number (9916), Name (Condiments), and Description (Condiments). The 'Layout' group is expanded, showing the 'Context panel' checkbox and the text 'Is this a context sensitive panel'.

Property	Value
Title	Sandwich Condiments
Font	Panel Title
Title Color	Skin
Title Position	Default
Background Color	Skin
Image	None
Hide panel border	False
Mark as template	False
Fixed panel position	False
Fixed button layout	False
Context panel	True
Use new panel display	False
Gradient	None
Shadow	False
Bevel	False
Outline	False
Scale image	False
Style	Rounded rectangle
Number	9916
Name	Condiments
Description	Condiments

Figure 5 Properties Dialog Box

4. Under the 'Identification' group bar, click the **ellipsis button (...)** next to 'Number' to display the Number Assignment dialog box, from which you can choose a **number**.

5. Type a **name** and **description** for the context panel.
6. Under the 'Appearance' group bar, type a **title** for the panel, using the naming convention you determined when doing the design analysis.
7. Select **True** from the 'Context panel' drop-down list to specify 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.
8. Configure the **remaining options** as you would for any other panel.
9. Select **Panel > Save Panel**.
10. Repeat this **procedure** for any other context panels you want to create.
11. Exit **Quick Service Screen Designer**.

Once you create a context panel, you can add buttons to the panel as you would any other panel, such as order modifiers, modifier codes, chains, quick combo upsells, and more. You can also add the Dynamic Included Modifier and Dynamic Substitute button functions, which are exclusive to context panels.



#### Reference

For information on configuring and using the Dynamic Included Modifier button function, refer to [Included Modifiers Feature Focus Guide - HKS482](#).



#### Reference

For information on configuring and using the Dynamic Substitute button function, refer to [Quick Combos Feature Focus Guide - HKS1507](#).

## Associating a context panel with an item or modifier

Once you create your context panels, use Item Maintenance to associate a context panel with an item or modifier.

**To associate a context panel with an item or modifier:**

1. Select **Maintenance > Menu > Items > Display Options** tab.
2. Select an **item or modifier** to associate with a context panel from the drop-down list.

Quick combo generated panel display settings	
QS Set text color	<input type="checkbox"/>
QS Set background color	<input type="checkbox"/>
QS Display bitmap	<input type="checkbox"/>
QS Hide text	<input type="checkbox"/>

Figure 6 Items - Display Options Tab

- Under the 'Context Panel' group bar, select the **context panel to appear** for this item when you add it to the guest check or select it from the guest check window.

The screenshot shows the 'Items - Modifier Tab' interface. At the top, the 'Item' dropdown is set to '20008 BBQ Sauce Food'. Below this, the 'Modifier' tab is selected. The 'If used as modifier' section contains several options, with 'Display context panel' checked. The 'Modified by' section shows five modifiers, all set to 'None'.

If used as modifier	
Apply surcharge	<input type="checkbox"/>
Apply price multiple	<input type="checkbox"/>
Combine price with parent item	<input type="checkbox"/>
Highlight if modifier	<input type="checkbox"/>
Print independently	<input type="checkbox"/>
Display context panel	<input checked="" type="checkbox"/>
Default weight	1

Modified by	
Modifier 1	None
Modifier 2	None
Modifier 3	None
Modifier 4	None
Modifier 5	None

Figure 7 Items - Modifier Tab

- If this item will be used as a modifier, select the **Modifier** tab.
- Select **Display context panel** to indicate a context panel is to automatically appear when you select the modifier from the guest check window.
- Configure the **remaining options** as you would for any other items or modifiers.
- Click **Save**.
- Repeat this **procedure** for each item or modifier to associate with a context panel.
- Exit the **Items** function.

## Associating a context panel with a quick combo

Once you create your context panels, associate them to a quick combo or quick combo component in Promotion Maintenance.

**To associate a context panel with a quick combo or quick combo component:**

1. Select **Maintenance > Payments > Promotions**.
2. Select the **quick combo** from the 'Promo' drop-down list.
3. To associate a context panel with an entire quick combo, select the **Quick combo QS** tab.

The screenshot shows the 'Promotions' window with the 'Quick combo QS' tab selected. The 'Promo' dropdown is set to '19 Single Combo Quick Combo QS'. The 'Quick combo QS' tab is highlighted with a red box. Below the tabs, there is a table with the following data:

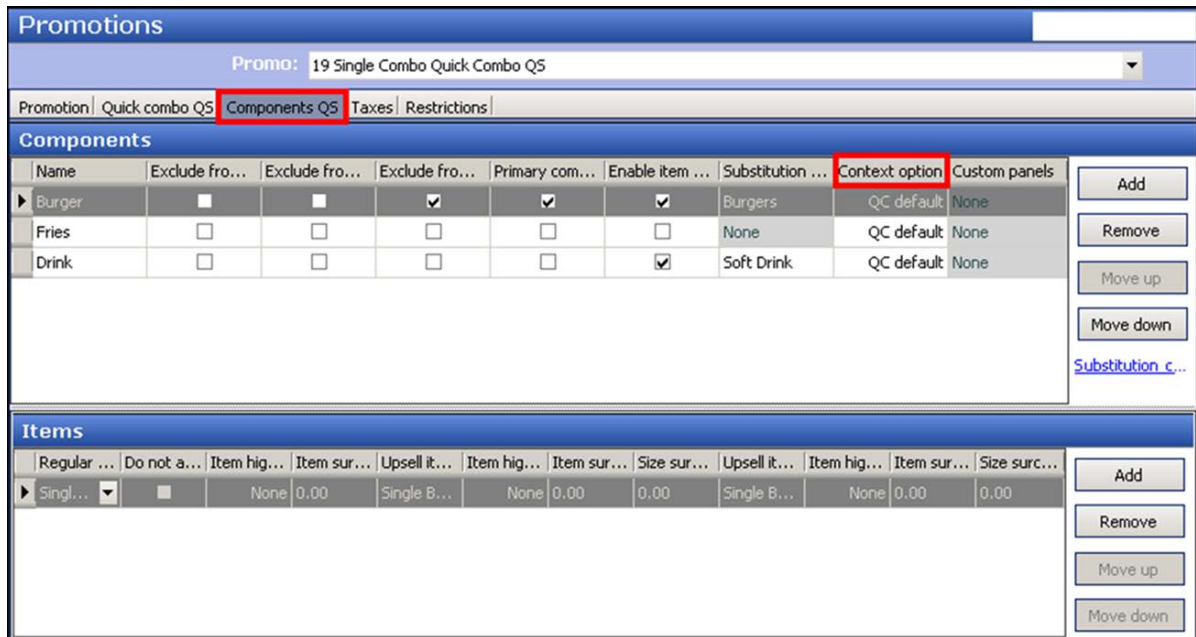
Quick combo QS	
Regular name	Single Combo
Regular price	3.50
Up-sell name #1	Single Upsell 1
Up-sell price #1	0.50
Up-sell name #2	Single Upsell 2
Up-sell price #2	1.00
Show up-sell as modifier	<input checked="" type="checkbox"/>
Auto apply if possible	<input checked="" type="checkbox"/>
Group delete	<input checked="" type="checkbox"/>
Allow components with mixed upsell levels	<input checked="" type="checkbox"/>
Auto calculate size surcharges	<input type="checkbox"/>
Only print combo name on guest check	<input type="checkbox"/>
Consolidate like components	<input type="checkbox"/>

At the bottom of the window, the 'Context Panel' dropdown is set to 'Condiments', which is also highlighted with a red box.

Figure 8 Promotions - Quick Combo QS Tab

- a. Select the **context panel** to automatically appear when you add this quick combo to a check or when you select the quick combo from the guest check window.
- b. Continue to **step 5**.

4. To associate a context panel with a component of a quick combo, select the **Components QS** tab.



Name	Exclude fro...	Exclude fro...	Exclude fro...	Primary com...	Enable item ...	Substitution ...	Context option	Custom panels
Burger	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Burgers	QC default	None
Fries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	None	QC default	None
Drink	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Soft Drink	QC default	None

Figure 9 Promotions - Components QS Tab

- a. Under the 'Components' group bar, locate the specific component and select a **context panel** to automatically appear when you select the component from the guest check window.
- b. Continue to **step 5**.
5. Click **Save**.
6. Repeat this **procedure** for each quick combo or quick combo component to associate with a context panel.
7. Exit the **Promotions** 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 Aloha 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 POS 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.



## Using Context Panels

Using context panels facilitates a smoother and easier process, allowing you to be more flexible when entering guest selections and reducing order entry errors. The procedures in this section assume context panels appear in a reserved area of the screen and a non-context panel appears when a context panel is not in use.



Figure 10 Non-Context Panel to Appear in Context Panel Area



## Adding and modifying an item

**SCENARIO:** The Super Burger item has an associated context panel. A guest orders a Super Burger with leaf lettuce, and also orders a JR Burger. The cashier touches the Super Burger button, modifies the item with leaf lettuce using the associated context panel, then adds the JR Burger. Afterwards, the guest remembers they do not want tomato slices, which are included on the Super Burger. The cashier touches Super Burger from the guest check window. The associated context panel appears. The cashier touches Tomato Slice to remove it as a modifier for the item.

1. Log in to the **FOH**. A non-context panel appears over the area for context panels as part of the order entry screen ([Figure 10](#)).
2. Touch **Super Burger**. The item appears selected in the guest check window and the associated context panel appears, in this case, indicating the modifiers included with the Super Burger item.

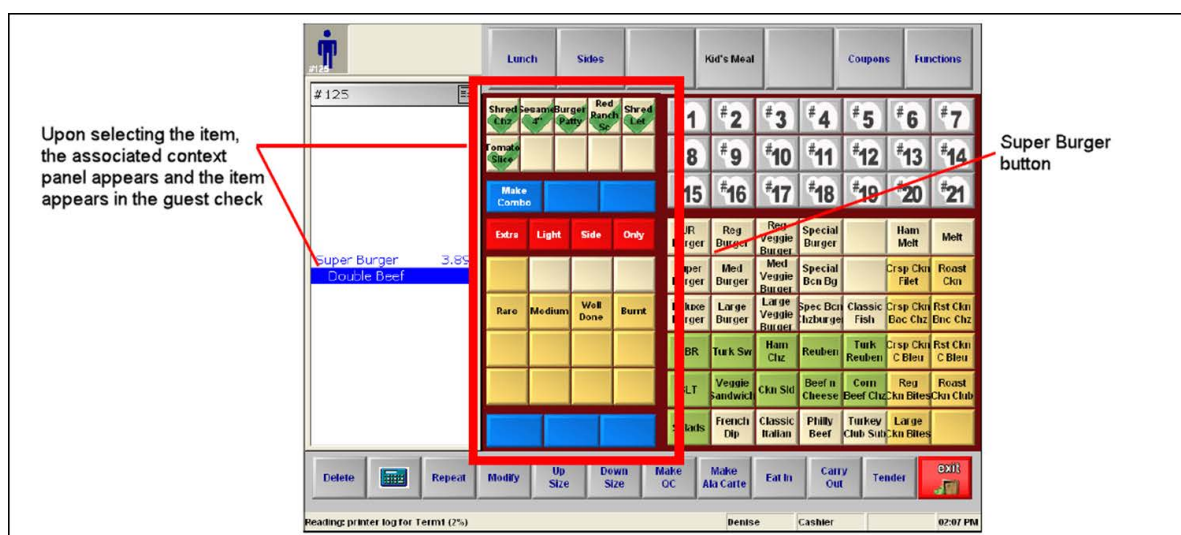


Figure 11 Context Panel for Super Burger

3. Touch **Leaf Lettuce** in the context panel. The menu item and the modifier appear selected in the guest check window.

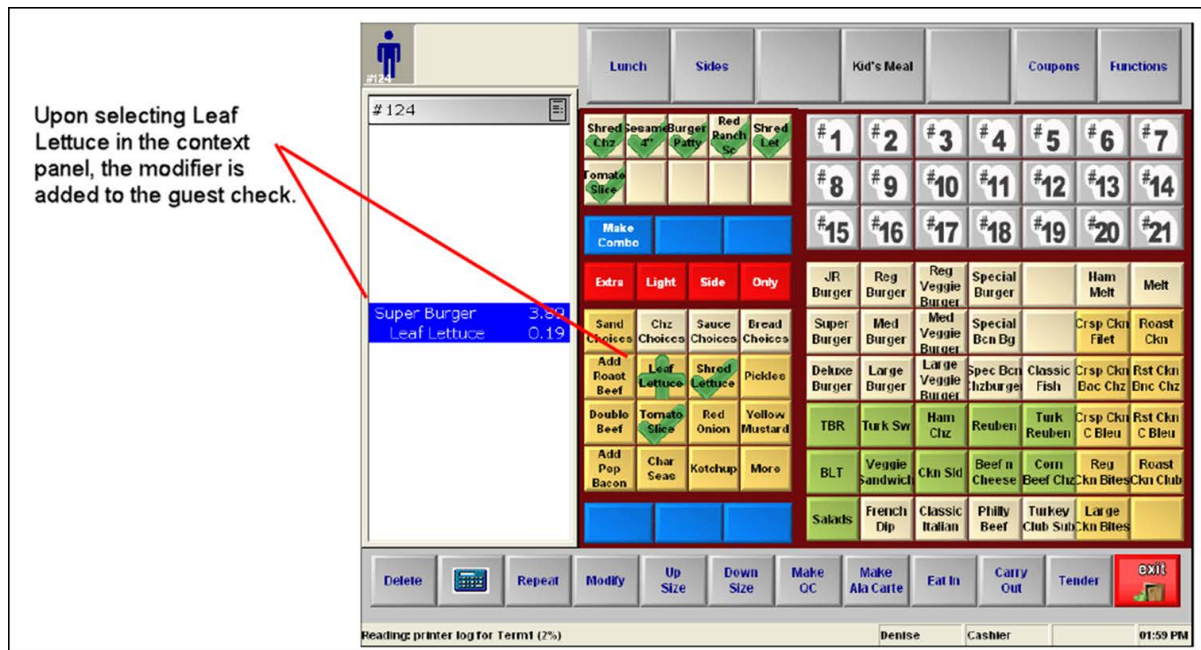


Figure 12 Leaf Lettuce Added to the Check

4. Touch **JR Burger** to add this item to the check. A regular (non-context) panel appears over the area for context panels because JR Burger does not have an associated context panel (Figure 10).

- When the guest requests to omit tomato slices on the Super Burger, touch **Super Burger** in the guest check window. The context panel associated with Super Burger appears again.
- Touch **Tomato Slice** in the context panel to remove the modifier from the item. The menu item and modifier changes appear selected in the guest check window.

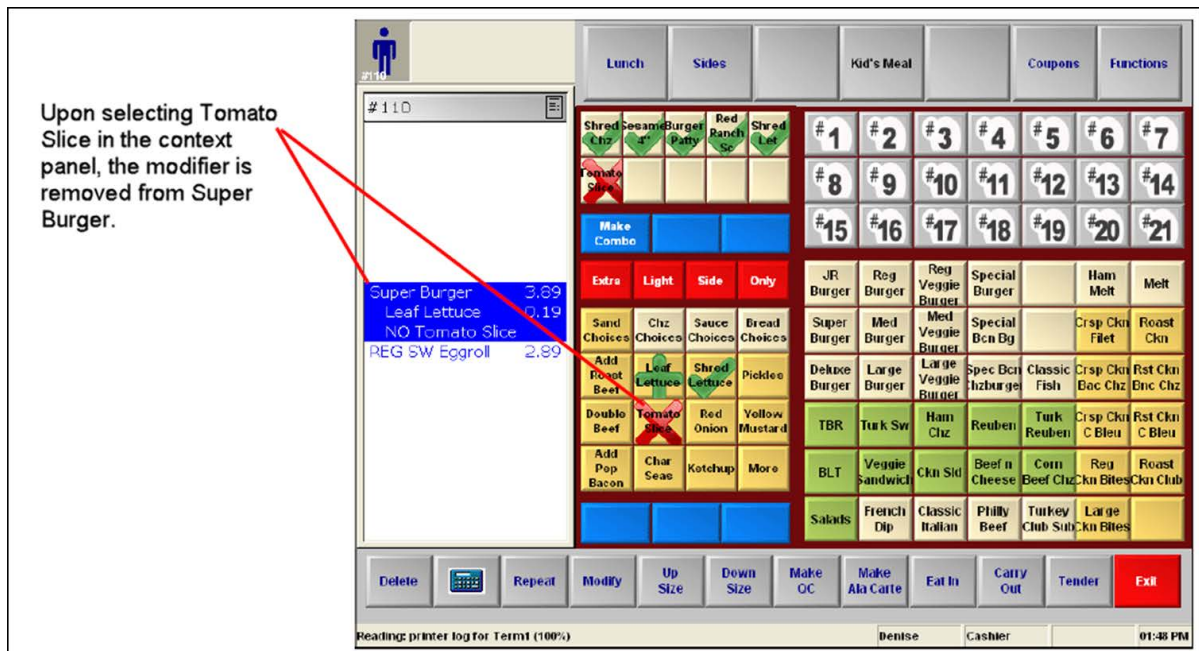


Figure 13 Tomato Slice Removed from Super Burger

## Adding and modifying a nested modifier

A nested modifier is a modifier that modifies another modifier.

**SCENARIO:** The guest orders a Super Burger with double beef, well done. The temperature (Well Done) is a nested modifier for the Double Beef modifier. The cashier touches Super Burger and then selects Double Beef from the associated context panel that appears. The cashier touches Double Beef and then selects Well Done from the associated panel that appears. If the guest changes their mind and decides they want the burger cooked medium instead, the cashier can select the Double Beef modifier item in the guest check window to change the temperature from Well Done to Medium.

1. Log in to the **FOH**. A regular (non-context) panel appears over the area for context panels as part of the order entry screen ([Figure 10](#)).
2. Touch **Super Burger**. The item appears selected in the guest check window with the associated context panel.
3. Touch **Double Beef** from the context panel. The modifier appears with both the menu item and the modifier selected in the guest check window and the associated context panel.
4. Touch **Double Beef** in the guest check window. The associated context panel appears.

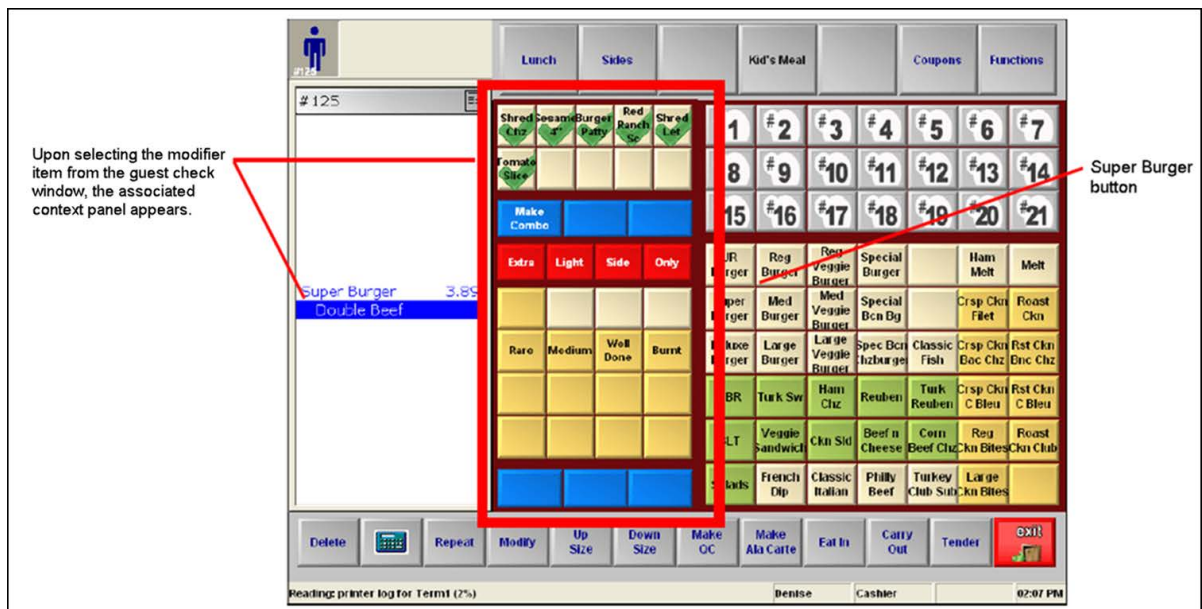


Figure 14 Double Beef with a Context Panel

5. Touch **Well Done** in the context panel. The nested modifier appears in the guest check window.

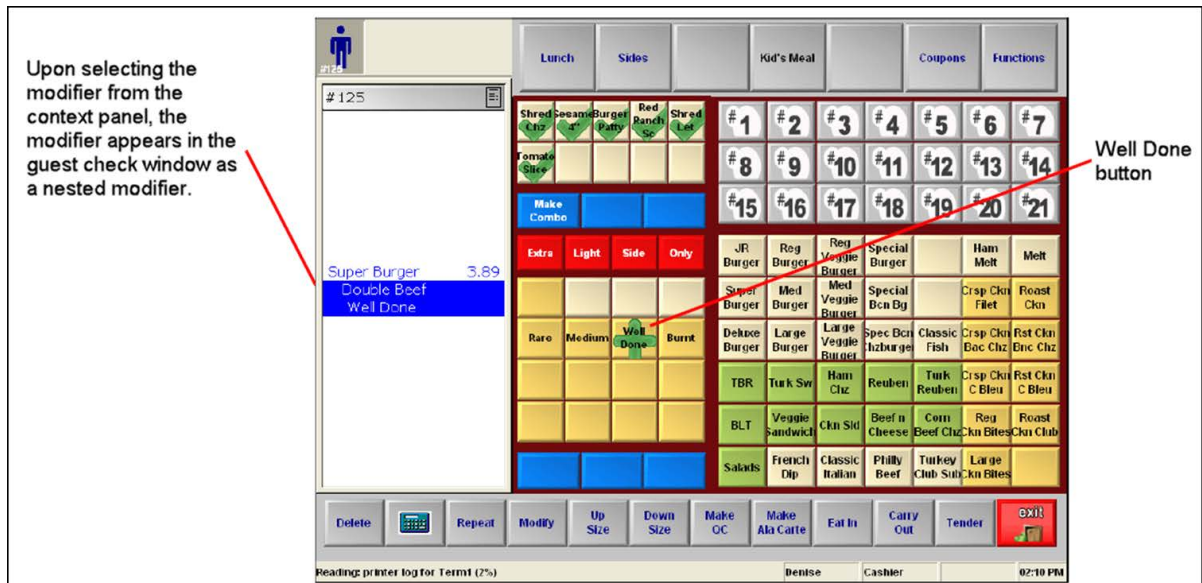


Figure 15 Well Done Modifying Double Beef



## Adding and modifying a quick combo

**SCENARIO:** The guest orders a Small Combo, which includes a medium burger, small curly fries, and a small drink, then orders Apple Sauce. During the order entry process, the guest would like to add pickles to the medium burger. The cashier touches Small Combo, modifies the medium burger with pickles in the associated context panel, then touches Apple Sauce. Afterwards, the guest remembers they want Cheese Sauce on the curly fry. The cashier touches SM Curly Fry from the guest check window, then Cheese Sauce, using the associated context panel.

1. Log in to the **FOH**. A non-context panel appears over the context panel area as part of the order entry screen (Figure 10).
2. Touch a **Small Combo** in a regular panel. The quick combo appears selected in the guest check window with the associated context panel.

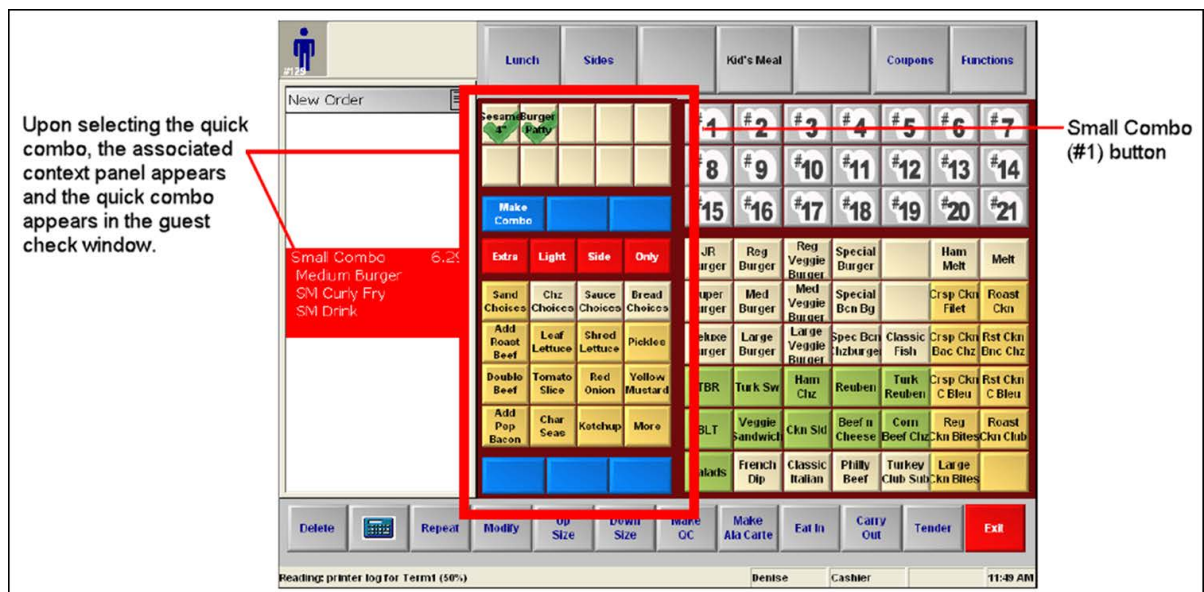


Figure 16 Quick Combo Added to the Check

3. Touch **Pickles** in the context panel. The Medium Burger and Pickles appear selected in the guest check window.

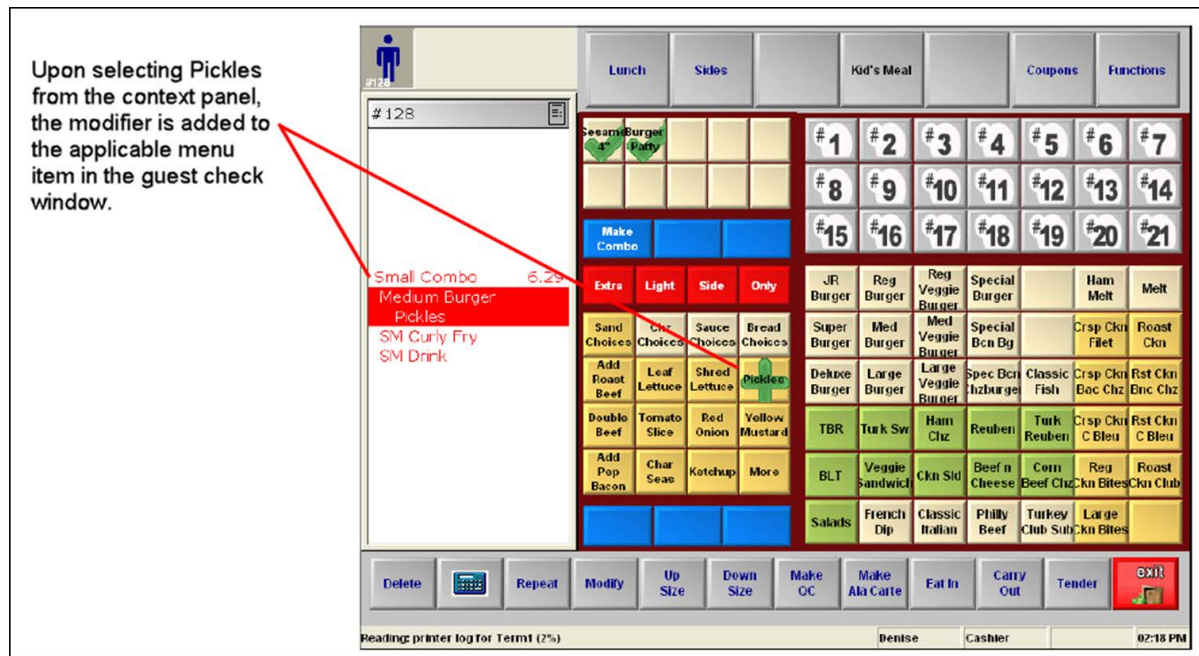


Figure 17 Pickles Modifying Medium Burger

4. Touch **Sides**, then **Apple Sauce**. The item is added to the check and a non-context panel appears over the area for context panels because Apple Sauce does not have an associated context panel.
5. When the guest requests Cheese Sauce be added to the Sm Curly Fry, touch **Sm Curly Fry** in the guest check window. The context panel associated with the Sides component appears.

- Touch **Cheese Sauce** in the context panel. The Sm Curly Fry and Cheese Sauce appear selected in the guest check window.

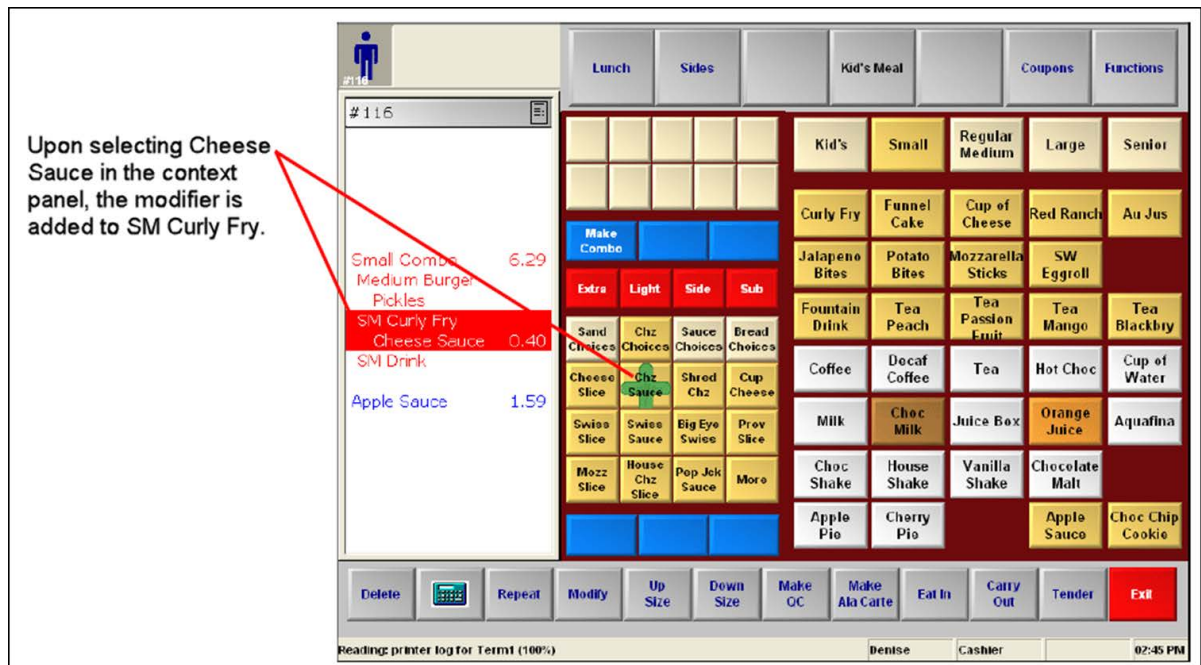


Figure 18 Cheese Sauce Modifying SM Curly Fry



#### Note

If you select the whole quick combo in the guest check window, the system tries to apply Cheese Sauce to Super Burger first because Super Burger is configured as the primary item.



## Context Panels, Feature Focus Guide

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