Feature Focus Guide:
Custom TS Order Entry Screen

Core Product: Table Service
Last Updated: June 20, 2024

Contents

Copyright and Trademark Information

The products described in this document are proprietary works of NCR Voyix.

NCR Voyix is a registered trademark of NCR Voyix.
Aloha is a registered trademark of NCR Voyix.
Microsoft and Windows are registered trademarks of Microsoft Corporation in the United States and/or other countries.

All other trademarks are the property of their respective owners.

It is the policy of NCR Voyix to improve products as technology, components, software, and firmware become available. NCR Voyix, therefore, reserves the right to change specifications without prior notice.

Not all features, functions and operations described herein are available in all parts of the world. In some instances, photographs are of equipment prototypes; therefore, before using this document, consult with your NCR Voyix representative or NCR Voyix office for the most current information.

© 2024 NCR Voyix
Atlanta
Georgia
USA
www.ncrvoyix.com
All Rights Reserved

Revision Record

Date	Version #	Description
Prior to 01/04/2023	v5.231+	Implemented support for Custom TS Order Entry Screen.
01/04/2023		Converted the document to use new templates.
01/11/2023		Update front cover and back page to reflect new NCR branding.
06/20/2024		Updated document to reflect NCR Voyix branding.

About Custom TS Order Entry Screen

Custom TS Order Entry Screen at a Glance	
Core Product	Aloha® Table Service
Complementary Products	
Separate License Required?	No
Other References	Aloha Table Service Reference Guide, Aloha Table Service Screen Designer Guide

The Aloha® Table Service product uses hard-coded screens to maintain familiarity and a consistent screen flow. The hard-coded design of the Table Service order entry screen includes the following areas:

Figure 1 Hard-Coded Order Entry Screen

The area located in the lower right portion of the order entry screen, labeled 'standard buttons' in Figure 1, typically contains the following buttons: Item Lookup, Recipe, Quantity, Repeat, Modify, Delete, and Hold; however, it is possible to have an optional fifth order mode in place of the Hold button. Some of these buttons are available at all times, and some depend on the configuration of the Back-of-House (BOH).

You can now create one or more custom panels to replace the buttons that usually appear in this area. You can add any number of buttons to a custom panel, but you cannot control the size of the panel or move it to another location on the screen; a custom panel always appears in the lower right portion of the screen.
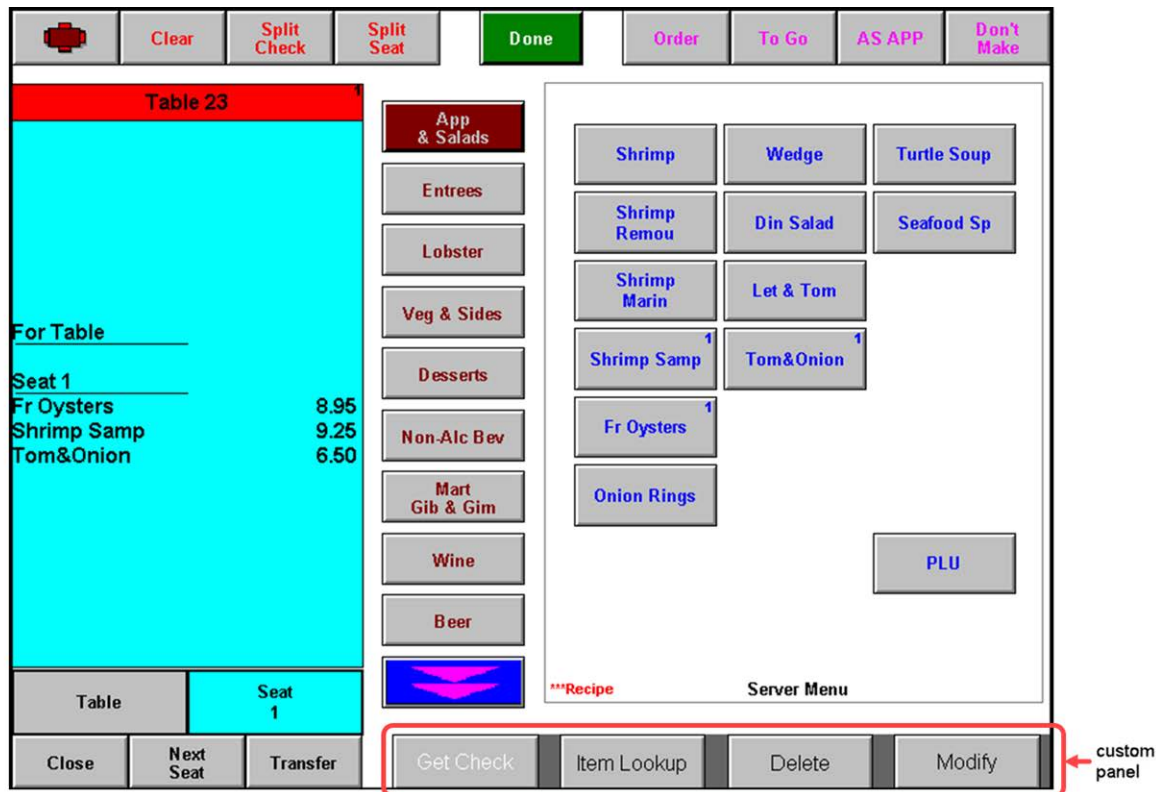

Figure 2 Order Entry Screen with Custom Panel

When you replace this area of the screen with a custom panel, you can use 'Chain' buttons to link multiple custom panels together. By linking panels together, you essentially have access to more functions. You also have the ability to disable certain buttons by job code. For example, if you want to add the **Get Check** button to the panel for your cashiers, but you do not want your servers to use this function, clear the 'Can get checks from other employees' check box for the server job code in **Maintenance** > **Labor** > **Jobcodes**. The **Get Check** button is visible for both cashiers and servers, but does not work for servers.

You can also create several custom panels with different button functions and control the panel that appears for an employee based on the job code of the person using the order entry screen. For example, create a custom panel that has functions a server would use, such as Item Lookup, Quantity, Hold, Modify, Delete, and Repeat. Create another custom panel that contains functions a cashier would use, such as Get Check, Reprint Check, and Print Receipt. When you create the event required to display the custom panel, the event allows you to link a specific job code to the custom panel.

Configuring Custom TS Order Entry Screen

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

Procedures at a Glance	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	Determine the **button functions** you need to make available. The number of buttons you need may require you to create a second or third custom panel. If you require more than one custom panel, use the Chain button function to provide access to and from the other custom panels. See page 6.
2.	Access **Maintenance > Screen Designer > Table Service Screen Designer > Work with Panels. Select Panel > New Order Entry Panel** and create as many custom panels as needed to replace the buttons located in the lower right portion of the order entry screen. See page 8.
3.	After you create the custom panels, access **Maintenance > System Settings > Event Schedules** and create a **'Set Order Screen Panel by Jobcode' event** to activate the custom panels by job code. See page 9
4.	Access **Utilities > POS > Refresh POS & All Installed Products** to refresh your POS system. See page 10.

Determining buttons to include on custom panel

When you replace the lower right buttons on the order entry screen with a custom panel, you must add a button for every function you wish to perform from the new panel. This includes the standard buttons you want to retain. The standard buttons are Item Lookup, Recipe, Quantity, Repeat, Modify, Delete, and Hold.

You can add the following button functions to a panel of the Order Entry type:

- Alerts
- Alternate Language GC Receipt
- Assign Menu
- Assign Price Change
- Automation Script
- Chain
- Course
- Custom Activity
- Custom Report
- Customer Information

- Dashboard
- Delete
- Get Check
- Hold
- Item Lookup
- Just-in-time Manager Approval
- Modify
- None
- Order Type
- Print Message
- Print Receipt
- Quantity
- Quebec Fiscal Printing
- Query Gift Card Balance
- Recipe
- Rename Tabs and Tables
- Reorder Family Style items
- Repeat
- Report Break Alert
- Reprint Check
- Reroute Display Board
- Run Display Board
- Run Application
- Script
- System Monitor
- Working with Tables Screen

Determine the buttons you need to make available. The number of buttons you need may require you to create a second or third custom panel. If you require more than one custom panel, use the Chain button function to provide access to and from the other custom panels.

NCR V:YIX

7

Creating a custom panel

Once you have a complete list of the button functions your employees need to access using the buttons on the lower right portion of the order entry screen, use Panel Editor to create the custom panel. You must use the Order Entry panel type to create this panel. Refer to the button function definitions in the **NCR Table Service Screen Designer Guide** for how to configure the standard buttons you need to retain.

> 📝 **Note**
>
> If you want to provide different buttons for your employees, based on their job code, you need to create more than one custom panel. Specify the custom panel to appear for each job code using the Set Order Screen Panel by Jobcode event type.

To create a custom panel:

1. Select **Maintenance** > **Screen Designer** > **Table Service Screen Designer**.
2. Select **Work with Panels**.
3. Select **Panel > New Order Entry Panel**. The Table Service Order Entry Panel Properties dialog box appears to the right with a blank panel located in the lower right portion of the screen.
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, and click OK.
5. Type a **descriptive name** for the new custom panel, such as Server OE Screen. This will help you identify it when assigning the panel to a job code in Events.
6. Type a brief **description** of the panel.
7. Continue with the **next procedure**.

You can link multiple custom panels together with the 'Chain' button. By linking panels together, you can add more functions, such as a Gift Card Query button, Get Check button, or Print Receipt button. If you link to another panel, remember to provide a way back to the first panel.

To add a button to a custom panel:

1. Right-click in the **blank panel** located in the lower right portion of the screen and select **New Button** from the menu that appears. The Button Properties dialog box appears in place of the Order Entry Panel dialog box.
2. Under the 'Function' group bar, select the **button function to add to the panel** from the 'Action' drop-down list. When you select a function, the function name sometimes appears as the default text for that button under the 'Appearance' group bar in 'Text.' For example, when you select 'Delete,' the default name in 'Text' changes to 'Delete.'
3. Complete the **options** under the 'Functions' group bar based on the action you select.

4. Under the 'Appearance' group bar, type the **text** to appear on the button, if different from the default text, and complete the **font**, **color**, **background**, and **bitmap** options. To display text on multiple lines, insert **\n** without spaces for line breaks.

5. Repeat **steps 1** through **4** until you add each required button, such as Delete, Modify, Hold, Quantity, Recipe, Item Lookup, Print Receipt, Reprint Check, and Repeat, the panel. You can click and drag each button on the panel to align the buttons, being careful not to overlap any buttons. If you need to add more buttons than can fit on the custom panel, use 'Chain' to link to another custom panel. Refer to the Table Service Screen Designer Guide for the requirements for configuring each button function, including the Chain button function.

6. Select **Panel > Save Panel**.

7. Select **Panel > Close Panel.**

8. Select **File > Exit** to exit **Table Service Screen Designer**.

Activating a custom panel

After creating your new panel, or panels, the Activation Schedule and Event Schedule functions work together to establish when and for what job codes a custom panel appears during order entry. Set up a 'Set Order Screen Panel by Jobcode' event type. This event type replaces the existing buttons on the order entry screen with the custom panel you designate. You must select a job code for which you want the custom panel to appear. If you want a custom panel to appear for all employees, you must create an event for each applicable job code.

Edit or add an activation schedule

To display a custom panel, you need an activation schedule that recurs daily and is in effect all day. The activation schedule you choose determines when you want certain events to automatically recur, such as daily at start-of-day, or weekly starting at 5:00 p.m. every Thursday. The POS system provides a default 'Always' activation schedule configured for start-of-day, which meets the recurrence needs of this scenario; there is no need to create a new activation schedule.

Add 'Set Order Screen Panel by Jobcode' event to event schedule

The 'Set Order Screen Panel by Jobcode' event type added to an event schedule establishes the custom panel to appear for each job code. How you use the Event Schedule function determines whether you add new events to an existing event schedule or add them to a new event schedule you create. For the purposes of this document, we assume you use one event schedule to which you add all events.

Because you do not require this event to stop before the End-of-Day runs, it is not necessary to disable this event; however, it is entirely possible to do this, if desired.

To add the 'Set Order Screen Panel by Jobcode' event type to an existing event schedule:

1. Select **Maintenance > System Settings > Event Schedule**.

2. Select the **event schedule** to edit from the drop-down list.

3. Select the **Events** tab.

4. Click the **Add** drop-down arrow, select **Set Order Screen Panel by Jobcode** as the event type, and click **OK**. The new event appears under the 'Events' group bar.

5. Select **Always** from the 'Activation Schedule' drop-down list. Because the Always activation schedule stipulates to begin at 'start of day,' you cannot edit the 'Start time' in the event definition. This information is read only.

6. Select the **date** on which you want the event to become active at the store in 'Start date.'

7. Select the **date** on which you no longer want the event to be active at the store in 'End date.'

8. Under the 'Set Order Screen Panel by Jobcode' group bar, select the **job code** for which you want a custom panel to appear from the drop-down list.

9. Select the **custom panel** to appear specifically for the selected job code from the 'Order screen panel' drop-down list. The Events tab reflects your selections under the 'Events' group bar as you make them.

10. Click **Save**.

11. Repeat steps **4** through **11** to configure additional job codes for which you want a custom panel to appear on the order entry screen.

12. Exit the **Event Schedule** function.

> 📖 **Reference**
>
> Refer to the Table Service Reference Guide and Table Service Screen Designer Guide for more information on Events.

Refreshing data

Once you configure the necessary features for Custom TS Order Entry Screen, you must refresh the Aloha POS system. Select **Utilities > POS > Refresh POS & All Installed Products** 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.

> 📝 **Note**
>
> 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.

NCR V⚙YIX

Using Custom TS Order Entry Screen

When using a custom order entry screen, you operate the FOH as normal and use the buttons in the custom area to perform the functions as needed.

The following figure provides an example of a custom panel that uses the Chain button function to provide access to a second custom panel.
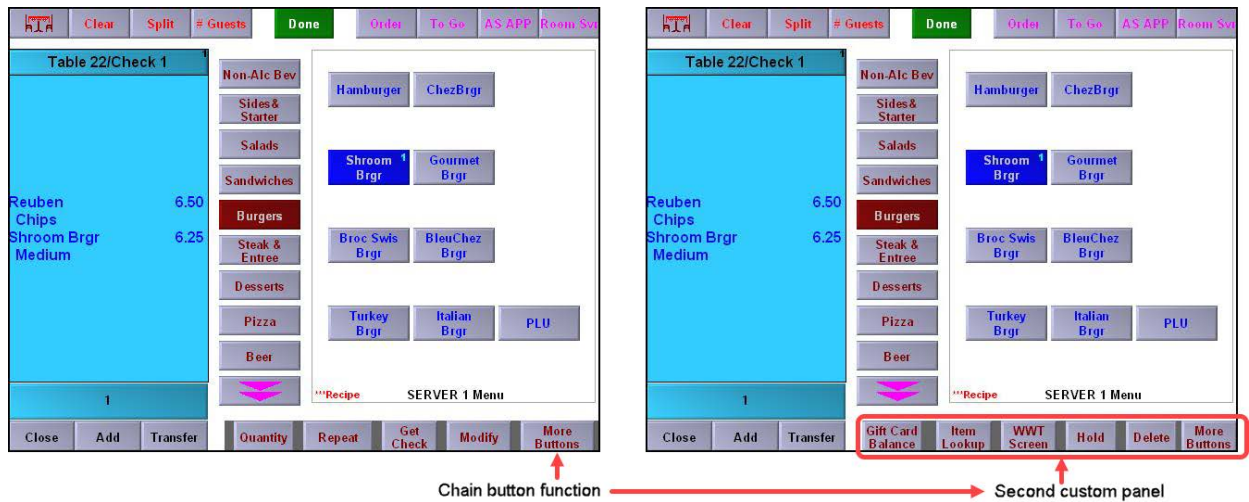

Figure 3 Custom Panel with Link to Second Custom Panel

Custom TS Order Entry Screen, 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