

Aloha Takeout v20.1 Implementation Guide

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About Aloha Takeout

| Aloha Takeout at a Glance | |
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| Core product | Aloha Quick Service or Table Service is required, version 6.4.13 or later. |
| Complementary products | Aloha Table Service requires a license for Aloha Delivery/Frequent Buyer (D/FB), included with primary Aloha Takeout license. |
| Separate license required? | <p>Takeout — Aloha Takeout requires a separate license.</p> <p>Delivery — The Delivery component of Aloha Takeout requires a separate license from Aloha Delivery/Frequent Buyer (D/FB), which is included as part of the Aloha Takeout license. It is not necessary to actually install D/FB.</p> <p>Mapping — A separate license is also required for the mapping module, if you elect to install it.</p> |
| Other References | Aloha Quick Service or Table Service Manager Guides or Reference Guides, ATO: Using Configuration Utility Quick Reference Guide. |

Efficiently managing the realities of your takeout and delivery operations quickly improves your speed of service and gives you the opportunity to grow beyond the walls of your business. Using Aloha® Takeout (ATO), your order entry, order management production, and delivery are synchronized in one tightly integrated solution.

Aloha Takeout provides an innovative solution to streamline take-away and curbside operations. The addition of the Aloha Takeout Delivery license enables the tools needed to manage deliveries. You can also add an Aloha Takeout Delivery Mapping license, to maximize the efficiency of your delivery business by optimizing delivery routes for drivers. With Aloha Takeout extending the feature-rich Aloha Quick Service and Table Service applications, your staff can now focus on smooth restaurant operations and superior guest service.

Installation of Aloha Takeout is separate from the Aloha Point-of-Sale (POS) system; however, if you install Aloha Takeout with Aloha Table Service or Quick Service, you must use Aloha Suite Installer. Once installed, configuration is accomplished from within the configuration management tool, either Aloha Configuration Center (CFC) or Aloha Manager (AM), as if it were an integral part of that product. As a best practice, we recommend accepting the default installation path, within the 'BootDrv share,' which is to say within the same directory as Quick Service or Table Service. For example:

| |
|--------------------------|
| C:\BootDrv\Aloha Takeout |
| C:\POS\Takeout |

Setting the LAN Manager authentication level

The LAN Manager authentication level for Microsoft® Windows® 10 and 11 determines the response protocol used for network logons. For ATO to work properly, you must set the level to 'Send LM & NTLM – use NTLMv2 session security if negotiated.' This setting is for Back-of-House (BOH) only and cannot be performed during the RAL or ATO installation. Newer images are equipped with this requirement; however, you need to check this on your local computer and set the proper level. You must use an administrator account to set this.

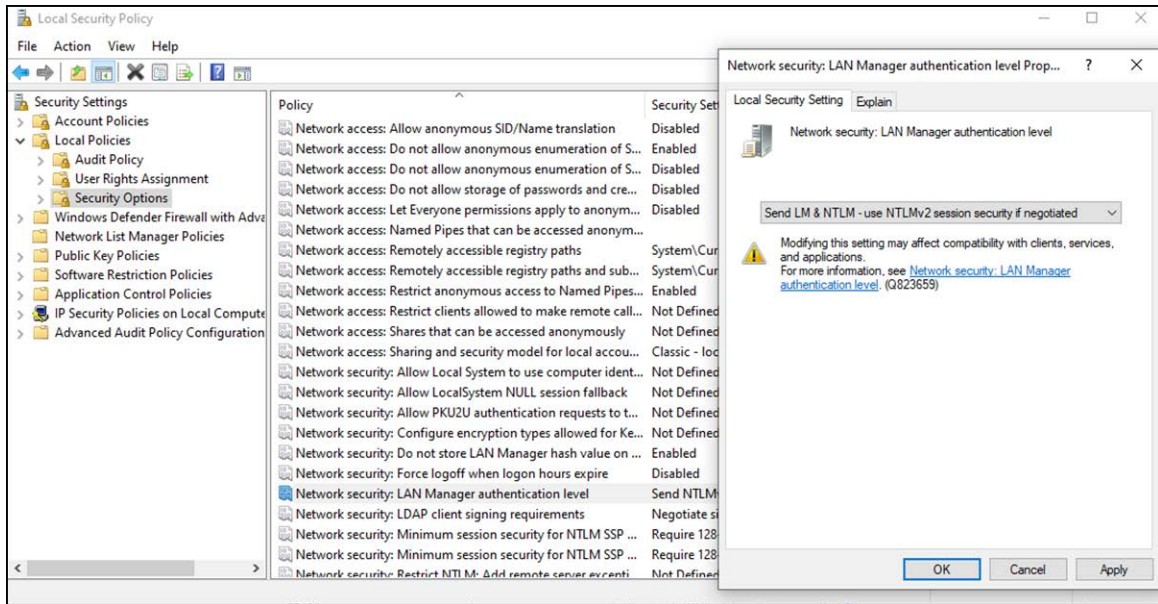


Figure Pref - 1 LAN Manager authentication level

To set the LAN Manager authentication level:

1. Using the Windows search bar, search for and open the **Local Security Policy** app.
2. In the 'Security Settings' tree, expand **Local Policy**.
3. Select **Security Options**.
4. Under the Policy list, locate **Network security: LAN Manager authentication level**. The Properties dialog box appears with the Local Security Setting tab open.
5. Select **Send LM & NTLM – use NTLMv2 session security if negotiated** from the drop-down list.
6. Click **OK**.
7. Exit the **Local Security Policy** app.

System and hardware requirements

The system and hardware requirements for both the Back of House (BOH) and Front of House (FOH) depend on the Aloha POS version as well as the number of modules installed.



Reference

Refer to the [Aloha Solution Requirements Guide - HKS1626](#) for additional information regarding requirements for the Aloha POS system.

Third-party software prerequisites

The prerequisites you need for supporting Aloha Takeout are all available from the downloads section of the Microsoft® Web site:

<http://www.microsoft.com/downloads>

- Perform all routine Windows updates for the Aloha POS file server and all Front-of-House (FOH) terminals. All installations are wizard-based. Double-click each file to launch the installation wizard, and click 'Next' and 'Finish' until the process is complete.
- Install the required .NET version on the Aloha Back-of-House (BOH) file server. The Aloha Takeout installation process validates the presence and the version of .Net installed, as it starts.
- Install the required .NET version on each terminal from which you want to access the Map screen on the Aloha Takeout FOH.
- Install the required version of Microsoft SQL Express on the Aloha BOH file server.
Select only the 'Database Services' for installation.
Select 'Mixed mode authentication.'
Select 'Enable User Instances.'
Leave the 'Named instance' set at the default, 'SQLEXPRESS.'



Tip

Microsoft SQL Express is installed by the configuration management tool. We recommend installing the configuration management tool prior to installing Aloha Takeout.

- Install the required version of SQL Express on the Aloha BOH file server, if needed.
- Run Windows Update on the Aloha BOH file server and install critical updates.

Because Aloha Takeout automatically binds to the SQLEXPRESS 'named instance' during installation, it is not absolutely necessary to install SQL Express. This application provides a user interface you can use to stop or start the Aloha Takeout database, if you find it necessary to do so. For this reason, we recommend installing this product as a 'best practice.'



Reference

Refer to the [Aloha Solution Requirements Guide - HKS1626](#) for additional information regarding requirements for the Aloha POS system.

Security key requirements

As requirements intensify, and as new versions of the Aloha POS system become available, you must upgrade the security key accordingly. Upgrade the security key as follows:

- Upgrade the security key to, at a minimum, the version of the Aloha POS system you are using. If your business needs require support for the full suite of Aloha Takeout features, you must upgrade to the latest Aloha POS version. ATO requires a minimum version of at least 6.4.
- Enable 'Takeout' for sites using any part of Aloha Takeout. Aloha Delivery (the legacy Delivery/Frequent Buyer product) is automatically enabled on all keys, when adding the Takeout license.
- Enable 'Takeout Delivery,' in addition to the 'Takeout' license above, for locations offering a delivery service.
- Enable 'Takeout Delivery Mapping,' in addition to the two license capabilities above, for sites using a mapping program in conjunction with their delivery service.
- Contact your NCR team member (RSM), if running FOH and BOH on a Radiant server, for help with licensing.

Overview of Aloha Takeout

Aloha Takeout is an independent module that works with the Aloha POS system to make your takeout or delivery business very easy to manage. The two modules work together to create, monitor, and maintain off-premise orders. Functions such as order entry, modification, taxation, and tendering of orders take place in the Aloha POS, per normal practice. Functions relating to linking orders to customer profiles, and organizing current and future orders for recall, update, and resolution take place in Aloha Takeout.

Aloha Takeout also works behind the scenes to facilitate complex or automated functions, using virtual components, to accept Aloha Online orders, automatically release future orders at the appropriate time, and assign delivery orders to drivers.

Aloha POS system and Aloha Takeout data usage

Aloha Takeout uses data in a slightly different way from the Aloha POS system. It is important to understand these differences, to avoid possible frustration while trying to 'track down' configuration elements that may seem to 'vanish.'

The Aloha POS system stores configuration changes in the CFC SQL database. During the End-of-Day (EOD) or refresh process, the Aloha POS system makes these changes available to the Front-of-House (FOH) in the Data directory by copying the appropriate files. This file copying process takes place regardless of whether changes were made during the previous day. One of the advantages of the configuration management tool (CMT) is POS and ATO options are stored in the same database. Configuration changes can be made at any time to either application. The configuration management tool does not require a POS refresh before POS options are available in Takeout Settings. The configuration management tool maintains data integrity between the two modules. The Refresh process makes configuration changes available to the FOH modules.

Based on these differences, the following, very high-level procedure for configuring these two program systems will help you to make the best of these data usage differences:

1. Install **Aloha Takeout**, making it available in the configuration management tool.
2. Run **Import** on an existing or copied Aloha Takeout Data directory.
3. Enable the **store** in Active Stores (CFC only).
4. Configure the **configuration management tool business** and **POS options** to support Aloha Takeout.

5. Select **Maintenance > Takeout Configuration > Takeout Settings**, in the configuration management tool, and configure Aloha Takeout, as required.
6. Refresh **data**.



Caution

If you are working on a 'live' system, we recommend performing all configuration and installation steps after the EOD has finished, but before the start of the first shift, to avoid unnecessary disruption of business caused by potentially repeated data refresh operations.

You may discover additional configuration requirements during operational trials, after your initial installation and configuration. If this occurs, the following general process will help you to accomplish these changes with the greatest efficiency:

1. Re-open the **configuration management tool** to ensure all associated services are running.
2. Make all **changes** necessary in the Aloha POS system.
3. Make all **changes** necessary in Aloha Takeout.
4. Refresh **data**.



Note

Similar to the POS, ATO clients read the latest configuration data each time the client is started. ATO clients read from the %ATOPATH%\Data directory on the BOH. Aloha Takeout piggy backs off the POS refresh process to restart each client. The ATOSTart.bat file is added to the Windows startup during Aloha Takeout terminal installation. When the terminal is restarted during refresh, ATOSTart.bat relaunches the client and reads the latest configuration.

Version updates

Upgrading Aloha Takeout is similar to upgrading the POS. Perform the upgrade only on the BOH. The ATO client that is present on each terminal reads the ClientBIN directory on the BOH, when starting and copying new binaries to the local %ATOPATH%\BIN directory. Once the copying of the new binaries is complete, the ATO client automatically restarts on a terminal with the latest version. Unlike the POS, restarts of the ATO client do not require the terminal to log off or reboot.

Virtual relationships, Aloha Takeout

Aloha Takeout makes use of virtual elements to accomplish the tasks required to manage your takeout or delivery business. A good understanding of what is happening in the 'virtual world' of Aloha Takeout may help to clarify these relationships for you.

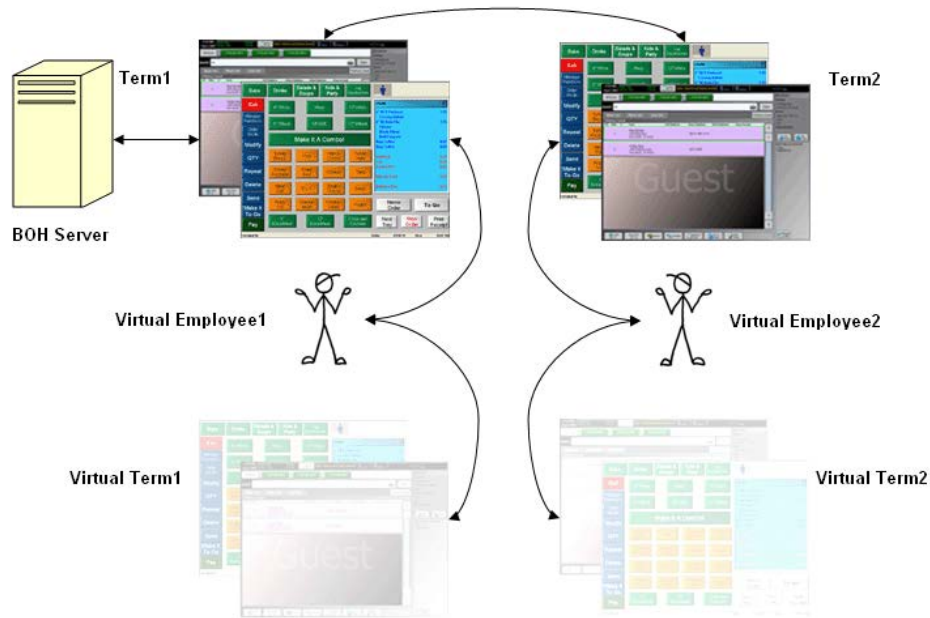


Figure Pref - 2 Virtual Relationships, Aloha Takeout

The parts of the Aloha Takeout system are as follows:

| | |
|---|---|
| Aloha BOH file server | Is physical location of programs and databases, and provides primary network connectivity across the network. |
| Physical terminals | Actual terminals used by store employees to look up customer records, enter orders, and facilitate handing off orders to customers or drivers for off-site delivery, using Aloha POS system and Aloha Takeout, as required. |
| Virtual terminals | Terminals used to perform complex or automated functions through the use of virtual employees. |
| Virtual employees | Used by Aloha Takeout as the logged in employee, when performing complex or automated tasks through Aloha Connect (COM). Virtual employees automatically carry out tasks behind the scenes, or even when no-one is logged in, while actual store employees use terminals to perform other tasks. Aloha Takeout clocks in virtual employees, at the first instance of need, and leaves them clocked in until the EOD process runs. |
| SQL Server (not shown), installed on the Aloha BOH file server | Manages the customer database, using Aloha Connect to pass information between the master database and the order entry terminals. |

How it works:

This section provides a narrative description of how the virtual and actual parts of the Aloha POS system network work together to handle your takeout or delivery orders. When you need to create a takeout or delivery order, it interacts with the assigned terminal to perform the following:

1. Locate or add the customer to the database.
2. Select an order mode to begin the order. Aloha Takeout creates the guest check, and applies the customer name to it.
3. Use the Aloha POS system to add items to the order.
4. Finalize the order using a button configured specifically to work with Aloha Takeout, for example, one to which a 'custom activity' button function is assigned, such as FLEX_ENTRY_COMPLETE.
5. Aloha Takeout places the check number in the ATO database for later recall, displaying the order in the Pick Up or Dispatch screen.
6. Recall the order when the customer arrives to pick it up, or assign the order to a driver, when it is ready for delivery.

ATO uses the POS queue functionality to quickly access and transfer checks between order takers, cashiers, and drivers.

7. Tender the order manually, or touch **Apply Payment** to use Aloha Connect to tender the order automatically using a stored payment, such as a credit card or house account.

Aloha Takeout stores orders until the end of the day, when the Aloha Takeout EOD process moves them to the historical tables and clears the active orders table in preparation for the new business day.

Aloha Connect (interface employees and interface terminals)

Aloha Takeout uses Aloha Connect, interface terminals, and interface employees, to accomplish several types of tasks. Examples of Aloha Connect functions are as follows:

- Creates the check, after an employee selects or creates a customer record and selects an order mode.
- Monitors the order status, and updates, as appropriate.
- Recalls an order to the FOH for updating.
- Releases a future order.
- Performs driver assignment and transfer functions.
- Passes stored payment information to the FOH.
- Calls the checkout function, when an employee touches **Checkout** on the Driver screen.
- Passes calculated delivery fees to the POS, for inclusion in an order.
- Accepts and processes orders from Aloha Online.



Note

Aloha Connect functions also apply to training interface functions.

Payments

Payment activities do not occur natively within Aloha Takeout; instead, they occur within the Aloha POS system and the system uses Aloha Connect to pass payment information between the two applications. Mapping the appropriate Aloha POS tenders with functions performed in Aloha Takeout, on the Maintenance > Takeout Configuration > Takeout Settings > Aloha Tenders tab, improves the flow of orders to drivers and customers, as follows:

- Identifying a POS cash tender allows the system to automatically close delivery orders to cash, unless you configure the system to manually close delivery orders.
- Mapping payment card tenders in Aloha Takeout to the correct payment card IDs in the Aloha POS system allows the system to apply credit card information stored in an ATO customer record to the appropriate payment card in the Aloha POS system.
- Identifying the POS house account tender allows Aloha Takeout to interface with POS functionality that stores house account balances and provides billing. ATO also supports an invoice printing feature associated with house accounts.
- Identifying the POS prepaid tender to use for closing checks for orders placed by ATO customers who provide a delivery service allows you to tender delivery service orders efficiently.

Driver financials

Drivers receive compensation for deliveries in several ways:

Hourly rate — An hourly pay rate received on their paycheck.

Tips — Cash or credit tips, which are deducted from the net cash owed by the driver on the driver checkout report.

Driver fees — A per delivery amount or check percentage that is deducted from the net cash owed by the driver on the driver checkout report.

Mileage — A per day mileage fee that is calculated by the payroll company and received on their paycheck.

Financial accountability for an order remains with the takeout and delivery queue until the order closes, at which time the accountability transfers from the queue to the cashier or driver. The system closes all open checks left in the takeout and delivery queue to interface employees during the Aloha EOD process. It is important to close and confirm all Aloha Takeout orders before the EOD procedure runs.



Caution

The Aloha POS system automatically closes orders left open in the ATO takeout and delivery queue to cash at End-of-Day. To avoid cash discrepancies, make sure to close all ATO orders on the Pick Up and Dispatch screens before running End-of-Day.

Order modes

As you configure Aloha Takeout, it is important to bear in mind that the program addresses the following three primary types of orders on a routine basis:

Walk-In — Orders in which a customer walks in, places an order, and waits for it to be prepared.

Call-In — Orders in which a customer calls in, places an order, then comes to the restaurant to pick it up.

Delivery — Orders in which a customer calls in, places an order, then waits for your business to deliver the order to a different location.

In addition to these order types, Aloha Takeout supports other types of orders that can be very important to your business:

Future Orders — Orders in which a customer calls in and places an order for up to several years in the future. This feature makes it easy for you to accept orders for large parties, and other functions, thus expanding the capabilities of your business.

Curbside — Orders for concepts with one or more designated outside pick up parking spaces. You can configure Curbside orders to appear on the Pick Up or Dispatch screens.

Catering — Orders for concepts that provide food for groups of people, usually for some type of event. This feature uses a discrete, separate order mode for accepting orders for this type of business without resorting to using other order modes in unusual ways. The process of creating the order and assigning it to a driver (optional) does not require unrelated information, and does not require you to deal with on-screen processes that are part of a different order mode. Catering orders display on the Pick Up or Dispatch screen depending on configuration. A separate report is available for summarizing and analyzing your catering business.

Dine In — Orders mistakenly placed at the wrong counter or a counter that serves both dine in and takeout guests. Used in some Quick Service operations, a 'Convert to Dine In' button appears, when you configure the Dine In order mode in Aloha Takeout. This allows employees to quickly change an order to dine in before items are ordered (sent to the kitchen). This feature does not work once the items are ordered.

Web — Orders for concepts using Aloha Online to account for online sales. This allows you to target orders for a single destination (pickup or delivery). If guests can pick up or request delivery of online orders, Aloha Online passes the Call-In and Delivery order types as part of the online order, based on how the customer requested to receive the order.



Note

Orders with an online component require you to configure the Order Mode including a Source and a Destination

Convert to Dine In (Quick Service only) — Customers approach the wrong counter, or a counter that serves both dine-in and takeout guests, and mistakenly place a takeout order when it should be a dine-in order. A Convert to Dine In button appears, allowing employees to quickly change an order to dine-in before the items are ordered (sent to the kitchen). This feature does not work once the items are ordered. The primary function of this button is to switch the order from one that originated in ATO to one that originated in the POS so that screen flow is controlled by the POS, not ATO.

Configuration best practices

As you install and configure Aloha Takeout, we recommend you refer to the following list of best practices, to help you be successful as you place the program into operation.

- Create a unique order mode for each order type offered at your site, and assign a different order mode for each order type used in Aloha Takeout.
- Create one unique job code for the Aloha Takeout interface employees.
- Create one unique job code for the Aloha Takeout training interface employees.
- Create job codes for order takers, drivers, dispatchers, and takeout cashiers, as needed.
- Create job codes for training order takers, drivers, dispatchers, and takeout cashiers, as needed.
- Create one interface employee for each Aloha Takeout (interface) terminal.

Enable **Must use Mag Card** on each interface employee. This requires the 'POS Password Method' be set to Optional or Required.

- Create one training interface employee for each Aloha Takeout (interface) terminal.
Enable **Must use Mag Card** on each training interface employee. This requires 'POS Password Method' be set to Optional or Required.
- Create training employees for each training job code. (i.e. training driver, training order taker, training cashier).
- Create one Radiant Interface Terminal for each Aloha Takeout terminal.
- Set the receipt printer of the host terminal for each Radiant Interface Terminal. Alternately, you can configure all Radiant Interface Terminals to print to a single printer, so released future orders print to a consistent location.
- Set the Radiant Interface Terminal voucher printer to that of the 'Interface Host' terminal.
Optionally set all Radiant Interface Terminal voucher printers to the printer attached to the 'dispatch' terminal.
- Create a unique Aloha Takeout queue.

Quick Service — Configure physical terminals to their own queue in Quick Service, unless they share a 'drive-thru' queue.

Clear 'Auto open new order' in Quick Service queue maintenance.

Verify a unique queue is assigned to each Quick Service terminal.

Do not assign job codes that interact with ATO orders to a queue in Maintenance > Labor > Job Codes > Order Entry tab.

Configure interface terminals to the Aloha Takeout queue.

Table Service — Create a unique Takeout queue for Table Service sites, ensuring the queue matches in both Store Settings > Delivery and Aloha Takeout Configuration.

- Create a unique void reason for future orders.
Enable **For Aloha Connect Use Only**.
Enable **Do Not Report**.
- Create a unique void reason for canceled orders.
Enable **For Aloha Connect Use Only**.
- Configure buttons, panels, and screens to optimize the order flow and reduce screen touches.
Use button labels that easily identify the button purpose and to reduce confusion.
- Configure petty cash accounts to properly transfer cash between drivers and cashiers.
- Configure ATO job code screens to limit employees to screens required to perform their duties.

Operational best practices

When you begin to use Aloha Takeout, specific operational practices will help your operations flow smoothly.

- Do not access other orders, in POS, until a recalled Takeout order has been finalized.
- Adjust all driver tips from Aloha Takeout.
- Use the Drivers screen, in Aloha Takeout, to run driver checkouts, unless using driver mileage reimbursement.
- Implement nightly-backup and offsite-backup storage procedures of the Aloha Takeout SQL database.
- Configure the backup to occur fifteen minutes prior to POS and ATO End-of-Day.

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About this chapter

You must perform several configuration steps to successfully integrate the Aloha POS system with Aloha Takeout. As you go through the process outlined in this chapter, you may find some requirements are already active in your current database, or may not be relevant to your site. For example, if you already have a 'Takeout' queue, or if you do not offer a delivery service, you do not need to configure these.

The main purpose of this section is to discuss the configuration requirements within the Aloha POS system; however, some requirements have a corresponding requirement in Aloha Takeout. In this case, we discuss what you need to do in both products to complete the implementation of the requirement or feature. By the time you complete the tasks in this chapter, you should have a working version of Aloha Takeout. To customize Aloha Takeout, refer to ["Customizing Aloha Takeout" on page 2-1](#)



Reference

Beyond the required settings described in this section, you may encounter other configuration requirements that are beyond the scope of this document. Refer to the following guides for more information about how to configure the Aloha POS system:

- [Quick Service Reference Guide](#) or [Table Service Reference Guide](#)
- [Quick Service Manager Guide](#) or [Table Service Manager Guide](#)

Making Aloha Takeout available in the product panel

Aloha Takeout is not active by default in the configuration management tool. You must enable Aloha Takeout as an installed product to make Aloha Takeout available in the product panel. Once active, the Aloha Takeout icon appears in the product panel at the top of the screen for both Aloha Configuration Center and Aloha Manager. Select the Takeout icon to display the Takeout Configuration tree under the Maintenance menu, from which you can access and perform the configuration tasks specific to and required for Aloha Takeout.

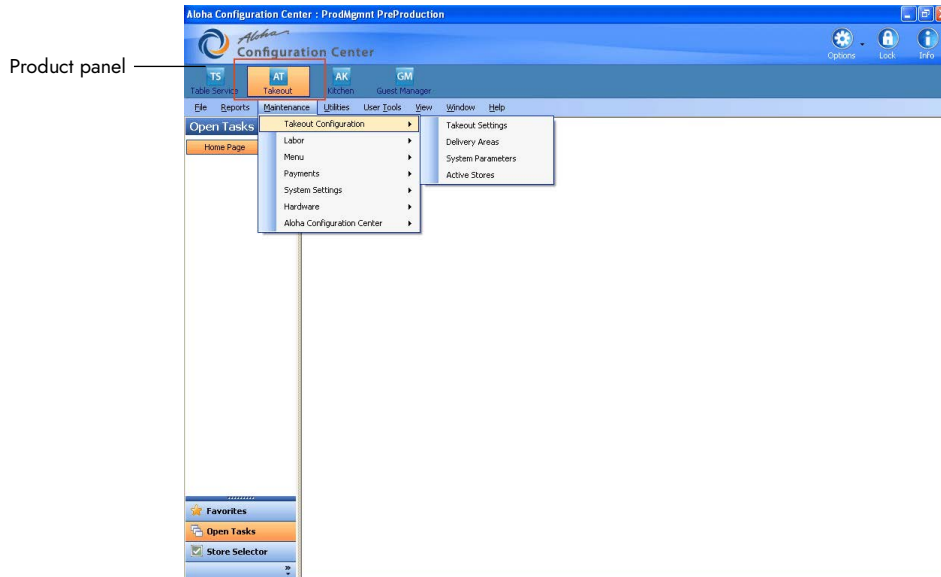


Figure 1 - 1 Configuration Management Tool - Aloha Takeout Drop-Down Menu

Takeout Settings — Options specific to Aloha Takeout that apply to the majority of sites. For sites that offer a variation from these settings, such as a site offering delivery, create a version of Takeout Settings, enable the delivery options, then assign the new version of Takeout Settings to the delivery sites.

Delivery Areas — Defines a delivery area for the selected location. Delivery areas vary by site based on geographic and franchise limitations.



Reference

Refer to the [Delivery Area Feature Focus Guide - HKS351](#) for more information on this feature.

System Parameters — Defines site specific network options required for Aloha Takeout to communicate. In most cases Aloha Takeout network options vary by site.

Active Stores — Allows you to define which sites within an enterprise offer takeout or delivery operations. This option is available in Aloha Configuration Center only. [See “Making a store active with Aloha Takeout” on page 1-13](#)

Sharing POS maintenance functions with Aloha Takeout

To successfully integrate Aloha Takeout with the Aloha POS system, the two products “share” some of the POS maintenance functions. To make it easier, the POS functions you need to support your Aloha Takeout configuration are also made available in the configuration tree for Aloha Takeout. For example, Aloha Takeout requires you to configure interface terminals, which you accomplish using the Terminals function in the Aloha POS system. With Aloha Takeout selected as the active product, select Maintenance > Hardware > Terminals to access the Aloha POS Terminals function.



Figure 1 - 2 Product Panel with Takeout

1. Log in to **Aloha Manager** or **Aloha Configuration Center** as a global user.
2. Select **Quick Service** or **Table Service** in the product panel.
3. In Aloha Manager, select **Maintenance > Business > Installed Products**.

— OR —

In Aloha Configuration Center, select **Maintenance > Business > Global Administration**.

| Products installed | |
|-------------------------------|-------------------------------------|
| Uses Takeout | <input checked="" type="checkbox"/> |
| Uses Kitchen | <input checked="" type="checkbox"/> |
| Uses Occasions | <input type="checkbox"/> |
| Uses Order Point | <input type="checkbox"/> |
| Uses Electronic Draft Capture | <input type="checkbox"/> |
| Uses Alerts | <input checked="" type="checkbox"/> |

Figure 1 - 3 Aloha Manager - Products Installed

4. Under the 'Products installed' group bar, select **Uses Takeout**.
5. Click **Save** and exit either **Installed Products** or **Global Administration**.
6. Log out of the **configuration management tool**, then log back in for the Takeout icon to appear in the product panel.

Using the Configuration Utility (wizard)

As of CFC/AM v18.10, you can use the Configuration Utility to configure certain areas of configuration in Aloha Takeout. The utility is available on the ATO menu, with a hidden marker file, in Aloha Configuration Center/Aloha Manager (CFC/AM), and is wizard based. It walks you through much of the configuration required to get up and running with Aloha Takeout. The Configuration Utility is ATO version-agnostic, meaning you can use it for any ATO version.



Caution

Be aware the Configuration Utility is designed for a fresh ATO install or if you want to start over on your configuration.



Reference

Refer to the [Aloha Takeout Using Configuration Utility Quick Reference Guide - HKS1761](#) for complete information on using the Configuration Utility.

The Configuration Utility performs the following for you:

- Creates one 'ATO INT' and one 'ATO INT tr' training job code.
- Creates one 'ATO acc' access level, with all options selected.
- Creates one employee for each order entry terminal with 'ATO INT *n*' as the first, last, and nick name, where *n* is the interface terminal ID that the employee will use. The utility also creates one training employee for each order entry terminal, with 'ATO INT *n*' as the first, last, and nick name, where *n* is the interface terminal ID that the employee will use.
- Sets 'Display delivery' to True in Additional Features.
- Sets 'Enable Aloha Delivery' to True and associates the delivery order queue in Store Settings.
- Creates an 'ATO' order entry queue each for Aloha Quick Service and Aloha Table Service.
- Creates one 'ATOD #*n*' interface terminal for each order entry terminal, where *n* is the sequential number of the interface terminal.
- Creates one 'Int Server' interface server.
- Creates one 'Future' void reason and one 'Cancel' void reason.
- Creates a Takeout Settings record with default settings.
- Sets the store as active in the Activate Stores function.

Configuring Aloha Takeout System Parameters

Aloha Takeout communicates with the Aloha POS system through Aloha Connect. You must define the IP address the system uses to communicate for Aloha Takeout to function correctly.

If you are using Configuration Center to configure a multi-site environment and the Aloha IP address varies by site, use the 'Version' function to create Aloha Takeout system parameters for each site, then set the IP address for the version owned by each site.

| System Parameters | |
|---|-------------------------------------|
| Takeout System Parameters: 999999 Default | |
| System | |
| Terminal | |
| Terminal designation | Default |
| Terminal number | 999999 ... |
| Service | |
| Scheme | net.tcp |
| Service host | localhost |
| Service port | 8020 |
| Server broadcast interval | 5000 |
| Discovery port | 21769 |
| Databus discovery port | 1221 |
| Databus communication port | 2221 |
| Server live interval | 30 |
| Master capable | <input checked="" type="checkbox"/> |
| Start POS interface | <input type="checkbox"/> |
| Master recovery seconds | 30 |
| Map repository path | Z:\Aloha Takeout\Mapdata ... |
| Map quality | High |

Figure 1 - 4 System Parameters

1. Select **Maintenance > Takeout Configuration > System Parameters**.
2. Under the 'Service' group bar, type the **IP address** the Aloha BOH file server uses to connect to the Aloha network, in 'Service Host.' The Aloha Takeout service broadcasts and accepts messages across this IP. If the IP address is incorrect or the network adapter is not at the top in the Connections frame, the terminals will not be able to connect to the service.
3. Clear **Start POS Interface** unless you are running Aloha Online. This option automatically starts and restarts a UI-less instance of Iber(qs).exe on the BOH computer to accept orders from Aloha Online.
4. Unless instructed by a representative, leave other **settings** as default.
5. Click **Save** and exit the **System Parameters** function.

Establishing communication between Aloha POS system and Aloha Takeout

You must establish communication between the Aloha POS system and Aloha Takeout in Store Settings.

1. Select **Quick Service** or **Table Service** in the product panel.
2. Select **Maintenance > Business > Store > Store Settings** tab.
3. Select the **System** tab at the bottom of the screen.

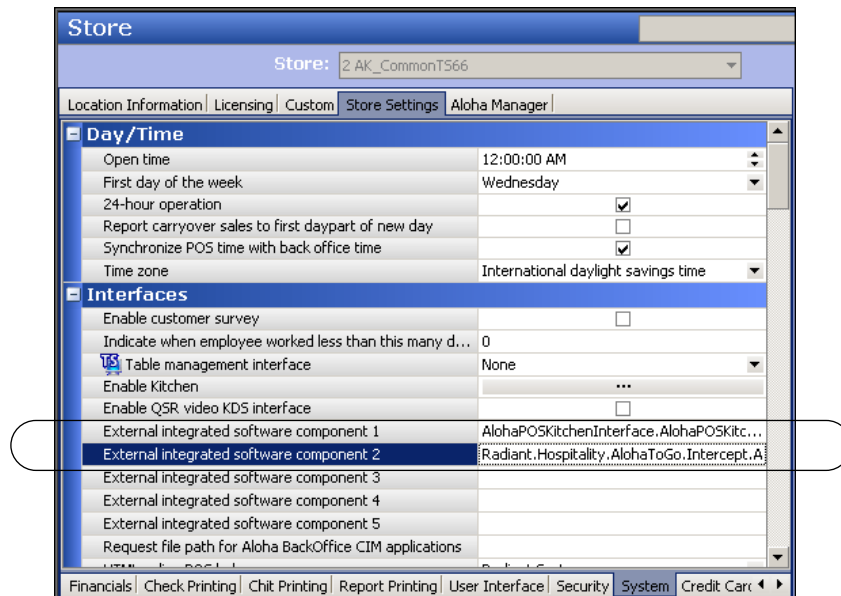


Figure 1 - 5 Store Settings - System Group

4. Under the 'Interfaces' group bar, type **Radiant.Hospitality.AlohaToGo.Intercept.AlohaToGoIntercept** in the first available 'External integrated software component' text box.
5. Click **Save** and exit the **Stores** function.

Specifying the POS core product

The Takeout tab contains site and POS integration information.

The screenshot shows the 'Takeout Settings' window with the 'Takeout' tab selected. The window has a menu bar at the top with options: Takeout, Order Modes, Customer Information, Deposits, Tenders, Jobcodes, Printing, Options, Order Scheduling, Barcode Scanners, and Panel Option. The main content area is divided into three sections: 'Identification', 'Takeout and Delivery Queue', and 'Cash Accounts'. The 'Identification' section has fields for Number (1), Name (Takeout Settings), Owner (1 Corporate-TableService), and POS Type (Table Service). The 'Takeout and Delivery Queue' section has a Queue dropdown set to Delivery. The 'Cash Accounts' section has four rows: Cash To Driver (Bank), Cash To Store (Driver Drop), Cash From Driver (Drop Recv'd), and Cash From Store (Bank Fund). Each row has a dropdown arrow on the right.

| Identification | |
|----------------|--------------------------|
| Number | 1 |
| Name | Takeout Settings |
| Owner | 1 Corporate-TableService |
| POS Type | Table Service |

| Takeout and Delivery Queue | |
|----------------------------|----------|
| Queue | Delivery |

| Cash Accounts | |
|------------------|-------------|
| Cash To Driver | Bank |
| Cash To Store | Driver Drop |
| Cash From Driver | Drop Recv'd |
| Cash From Store | Bank Fund |

Figure 1 - 6 Takeout Settings, Takeout Tab

Aloha Takeout activates specific program assumptions based on the capabilities inherent in the core POS product. For this reason, you must tell ATO which POS product you are using.

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Takeout** tab.
2. Under the 'Identification' group bar, select your **core POS product**, Table Service or Quick Service.
3. Click **Save**.

Enabling Aloha Delivery for use with Aloha Takeout

Aloha Takeout uses Aloha POS functionality, implemented for Aloha Delivery. This includes order modes, service charges, driver fees, and driver checkout printing. We recommend you enable 'Display delivery' so that you can use Aloha Delivery with Aloha Takeout.



Tip

When you run the Configuration Utility, the system automatically selects 'Display delivery' for you.

1. Select **Maintenance > Business > Additional Features**.

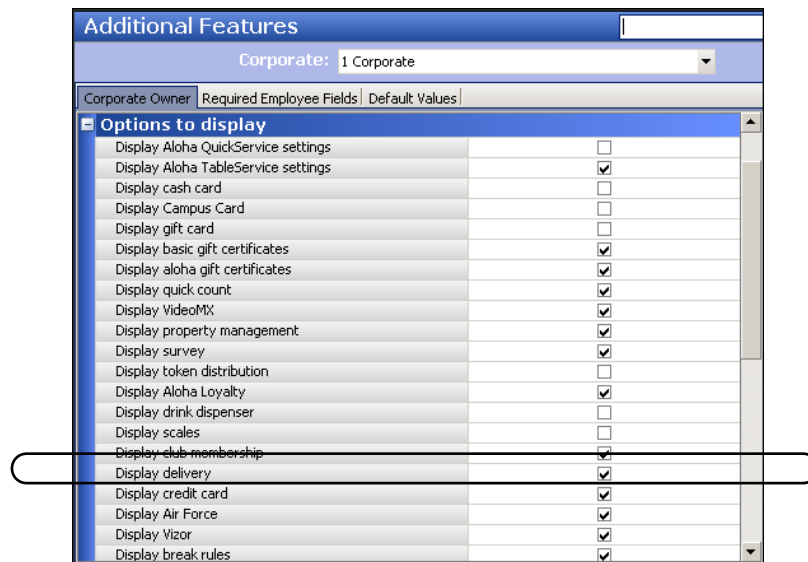


Figure 1 - 7 Additional Features - Display Delivery

2. Under the 'Options to display' group bar, select **Display delivery**.
3. Click **Save** and exit the **Additional Features** function.

Importing Aloha Takeout data

Before you can begin configuring Aloha Takeout for your site, you must use one of the following methods to import initial Aloha Takeout data into the configuration management tool. You must close all functions before you run the import. You can:

Use the default **%ATOPATH%\Data** directory created when installing ATO on the Aloha BOH file server.

— OR —

Copy the **%ATOPATH%\Data** directory from another Aloha Takeout installation and overwrite your local ATO data files.

1. Select **Aloha Takeout** in the product panel.
2. Select **Utilities > Takeout > Run Import**.
3. Verify the **correct path** for Aloha Takeout appears in the 'Folder' text box.
Click the **ellipsis button (...)** to change the path, if necessary.

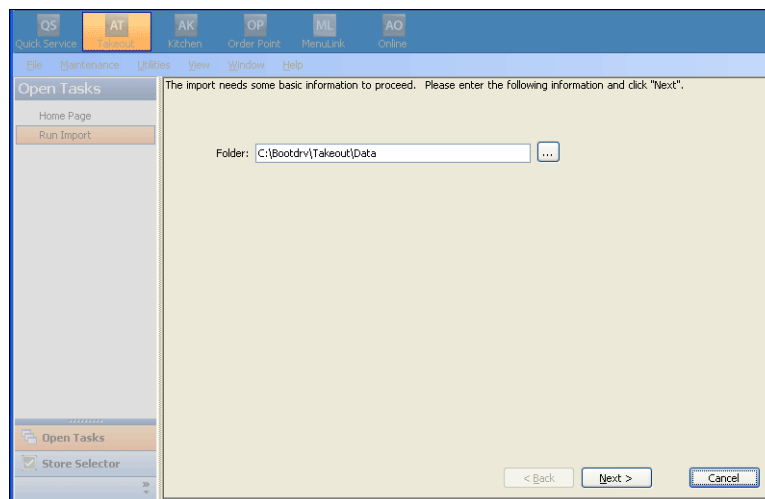


Figure 1 - 8 Data Import, Aloha Takeout Path Screen

4. Click **Next** to proceed with the import.

5. Review the **Import Report** to determine if significant errors occurred during the import.

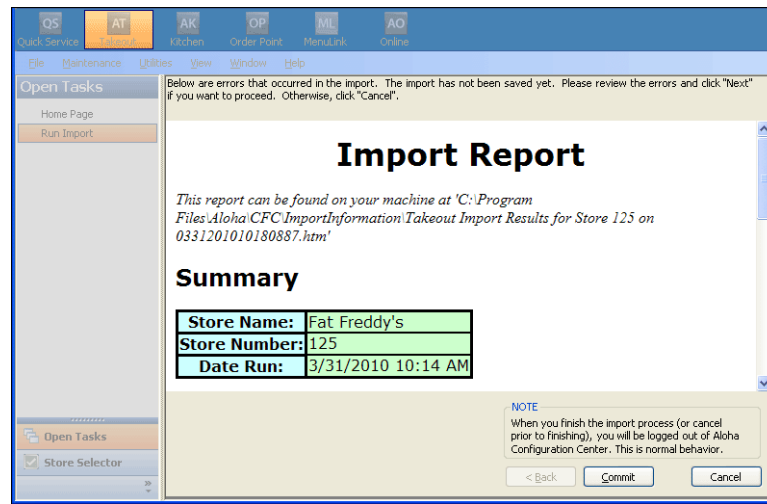


Figure 1 - 9 Data Import, Import Report

6. Click **Commit**, if no significant errors are in the Import report.
If there are errors, resolve or contact support for assistance.
7. Click **Finish** in the **Import Completed** screen. The configuration management tool automatically logs out at this point, as noted in this screen.

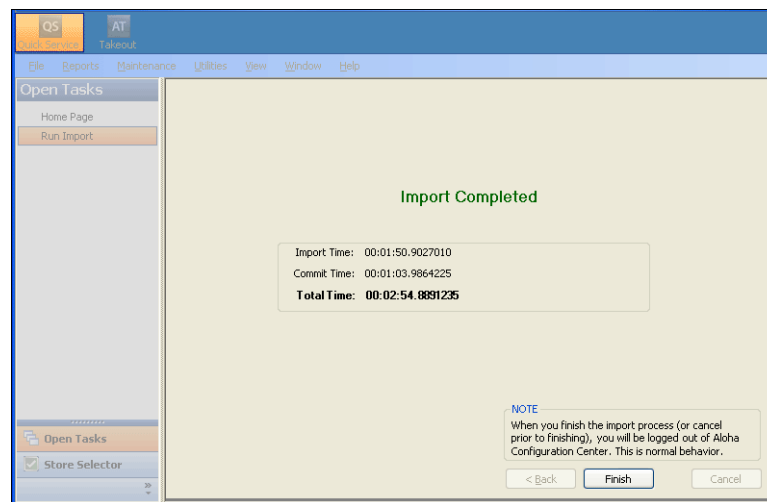


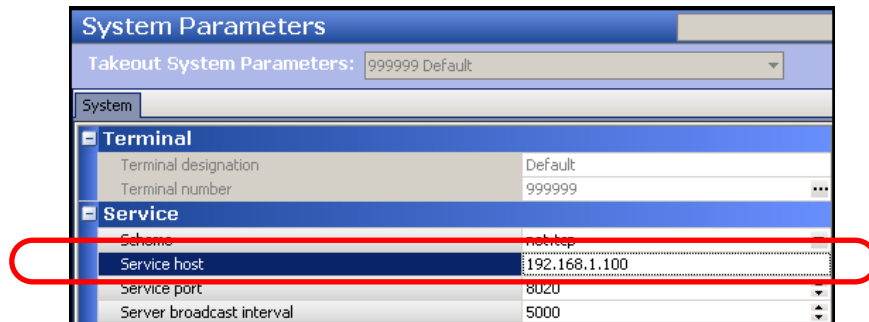
Figure 1 - 10 Data Import, Import Completed Screen

The next time you log in to the configuration management tool, the imported data is active and accessible.

Setting the service host IP address for ATO communication

You must correctly set the Service Host IP address for terminals to communicate with the host after the initial installation.

1. Select **Maintenance > Takeout Configuration > System Parameters**.



| System Parameters | |
|---|---------------|
| Takeout System Parameters: 999999 Default | |
| System | |
| Terminal | |
| Terminal designation | Default |
| Terminal number | 999999 |
| Service | |
| Service host | 192.168.1.100 |
| Service port | 8020 |
| Server broadcast interval | 5000 |

Figure 1 - 11 System Parameters

2. Under the 'Service' group bar, type the **IP address** of the Aloha NIC of the Aloha BOH file server in 'Service host.' Note: This should be the IP address of the NIC selected in the "Confirm the Aloha NIC is the First Connection" section of this document.
3. Click **Save**. and exit the **System Parameters** function.
4. Navigate to **Utilities > Aloha Manager** and click **Refresh POS and All Installed Products**.
5. Restart the **Aloha Takeout and Delivery Service**.

Making a store active with Aloha Takeout

Aloha Configuration Center makes use of an “active stores” list to stipulate when a store is ready to begin using Aloha Takeout, meaning all configuration is complete, equipment is in place, and employees are trained. The use of the active stores list makes it possible to hide Aloha Takeout functionality at stores that do not offer takeout or delivery services, as well as leave a store as inactive until you are ready for takeout operations. Once you add a store to the active stores list, you can export the configuration to that store and the store can begin using Aloha Takeout immediately following the next refresh.



Tip

Active stores only apply to Aloha Configuration Center. Skip this procedure, if you are using Aloha Manager.

After you enable Aloha Takeout in Configuration Center, and complete the configuration, you must make Aloha Takeout active, to begin exporting configuration options for each store. In the case of Aloha Takeout, CFC updates the AlohaToGoConfig.xml each time you perform a refresh, overwriting the existing configuration at the store.



Tip

When you run the Configuration Utility, the system automatically makes the store active in the Active Stores function.

1. Log in to **Aloha Configuration Center** as a corporate user.
2. Select **Maintenance > Takeout Settings > Active Stores**.

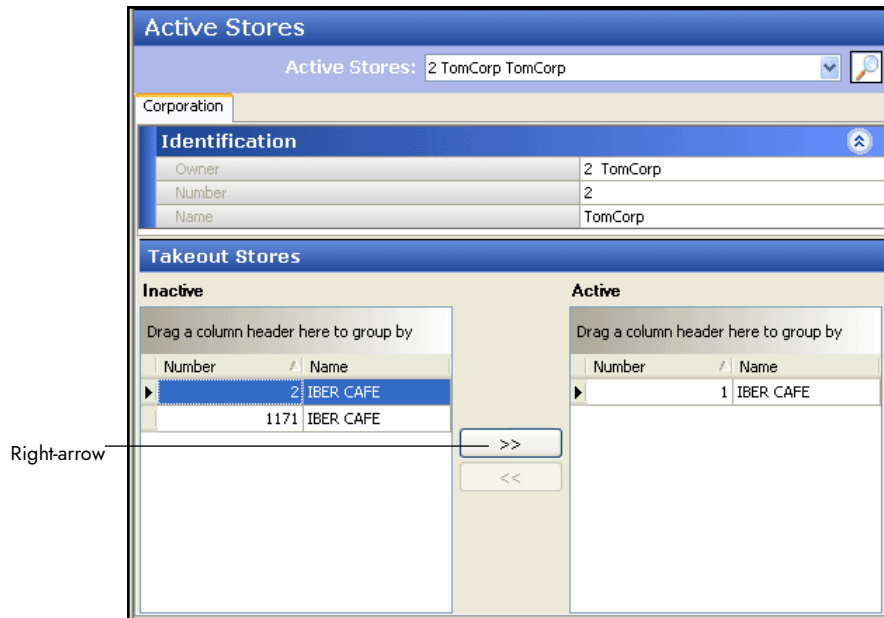


Figure 1 - 12 Active Stores

3. Select a **store** in the Inactive list and click the **right-arrow** to move the store to the Active list.
If you accidentally move a store to the Active list, you can select it, then click the left-arrow to move it back to the Inactive list.
4. Repeat **this procedure** to move as many stores as necessary to the Active list.
5. Click **Save** and exit the **Active Stores** function.

Creating POS order modes for Aloha Takeout

As you configure Aloha Takeout, the system bases its screen flow and business functionality on the type of order being entered. For example:

- An order for delivery requires a customer name and address to start an order and orders appear on the Dispatch screen.
- An order for customer pick-up prompts for a customer phone number and orders appear on the Pick Up screen.

In other words, the type of order controls the data you must enter and the ATO screen from which you access an active order, to make the order-taking process more efficient.



Caution

Do not share order modes with the Aloha POS system and Aloha Takeout. For proper interaction between Aloha Takeout and the Aloha POS system, these modules cannot share order modes. Sharing order modes can have undesired results in the flow of order entry, the screens on which orders appear, whether you can assign an order to a driver, reporting, and more. You must create a unique order mode for each ATO order type you accept in your site, separate from the POS order modes.

During the ordering process, if you change the order mode to a check to an order mode that is not aligned in Aloha Takeout, 'Not Set Order' appears on the kitchen chit.

| Suggested Settings: POS Order Modes for Aloha Takeout | | | |
|---|---------------|---------|--------------|
| Settings | Walk In To Go | Pick-Up | Delivery |
| Order Mode tab | | | |
| Active | √ | √ | √ |
| All Items | √ | √ | √ |
| Include Ordered Items (QS Only) — Select this option, as it is needed to change the order mode in Quick Service. | | √ | √ |
| Service charge group bar | | | |
| Apply service charge — Select this option, if adding delivery fees to checks. | | | √ |
| Charge line text | | | Delivery Fee |

| Suggested Settings: POS Order Modes for Aloha Takeout | | | |
|--|---------------|---------|----------|
| Settings | Walk In To Go | Pick-Up | Delivery |
| Tax applied to service charge — Aloha Takeout cannot calculate tax on delivery fees, even if you select this option. A different amount than when the items are first ordered appears on the confirmation screen, and the system calculates tax for the service charge. When using Aloha Takeout, set this option to “None” to avoid any tax and total calculation discrepancies. | | | None (0) |
| Fixed — Select Fixed as opposed to Percent. | | | √ |
| Amount — ATO calculates the delivery fee based on the defined Aloha Takeout configuration and passes the amount to the POS, replacing the 0.00 amount. See “Enabling Aloha Delivery for use with Aloha Takeout” on page 1-9. | | | 0.00 |

To create a POS order mode for use with Aloha Takeout:

1. Select **Maintenance > System Settings > Order Modes**.
2. Click **New** to add a new order mode.
3. Using the [Creating POS order modes for Aloha Takeout](#), make the **desired selections** for the order mode you are adding.
4. Repeat the **steps above** for each POS order mode used with Aloha Takeout.
5. Click **Save** and exit the **Order Mode** function.

For Table Service operations, the system replaces the order mode buttons that appear at the top of the submenu with those defined on the Store Settings > Delivery tab, when the logged in employee has a ‘delivery’ job code. It is important to define these order modes in the event you need to change the order mode of an ATO order in Table Service. Aloha Takeout allows you to select up to three order modes. You can select any order mode you align with Aloha Takeout in these three drop-down lists.



Tip

Skip this procedure if you are using Quick Service.



Reference

As of ATO v19.x, you must define a Source and Destination record to address all order sources leveraged by an online ordering solution, such as a store website and a delivery marketplace. This enables the online ordering solution to inject orders into ATO. If this record does not exist, order injection fails. Refer to the [Source and Destination Feature Focus Guide - HKS380](#) for more information.

To align the takeout order modes with the POS delivery function:

1. Select the Table Service icon from the Product panel and select **Maintenance > Business > Store > Store Settings** tab.

The screenshot shows the 'Store Settings' tab in the Aloha Manager. The 'Setup' section is expanded, showing various configuration options. Two red circles highlight specific settings: the 'Delivery order queue' is set to 'Takeout', and the 'Delivery order mode' is set to 'Delivery'. Other settings include 'Enable Aloha Delivery' (checked), 'Default look-up method' (Last name), 'Naming method for delivery orders' (Phone), 'Dine in order type' (unchecked), 'Delivery order type' (checked), 'Call in order type' (checked), 'Walk in order type' (checked), 'Default promise time in minutes' (0), 'Maximum delivery fee' (0.00), 'Maximum number of orders a driver can self-assign' (5), 'Allow delivery orders to be transferred to a server' (unchecked), and 'Number of caller ID lines' (4).

Figure 1 - 13 Delivery Order Modes

2. Select the **Delivery group** at the bottom of the screen.
3. Under the 'Setup' group bar, select **Enable Aloha Delivery**.
4. Select the **order entry queue** you created for use with Aloha Takeout from the 'Delivery order queue' drop-down list.



Tip

When you run the Configuration Utility, the system automatically selects 'Enable Aloha Delivery' and associates the order entry queue from the 'Delivery order queue' drop-down list for you.

5. Select **order modes** to appear at the top of the Table Service order entry screen from the 'Delivery order mode,' 'Call-in order mode,' and 'Walk-in order mode' drop-down lists, as necessary.
6. Click **Save** and exit the **Store** function.

To align POS order modes with Aloha Takeout

1. Select **Maintenance > Takeout Configuration > Takeout Settings**.

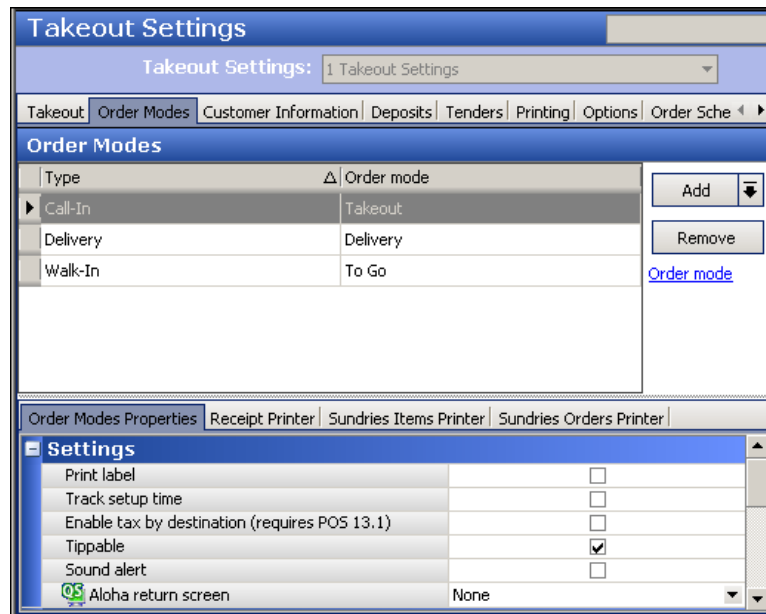


Figure 1 - 14 Aloha Takeout Configuration - Order Modes Tab

2. Select the **Order Modes** tab.
3. Click the **Add** drop-down arrow, select an ATO order **type**, and click **OK**. The Order type is added to the list of order types under the 'Order Modes' group bar.
4. Click the **Order mode** drop-down list for each ATO order mode type and select the **POS Order mode** to which it aligns.
5. On the Order Modes Properties tab, under the 'Settings' group bar, select **Print label** to print labels for a selected order type.
6. Select **Tippable** to allow you to enter a tip for orders assigned to this order mode, provided that the applied tender in the Aloha POS system also allows tips. The Enter Payment Information screen is dynamic in that the prompt to enter a tip amount appears, or does not appear, based on the configuration of the tender and the applied order mode, to reduce confusion for the employee.
7. On the Receipt Printer tab, select a **printer** in the 'Available' list and click the **right-arrow** to move it to the 'Included' list. This is commonly used to print a guest check to the driver dispatch station after finalizing a delivery order.
8. Repeat this **procedure** for each order type supported at your location.
9. Click **Save** and exit the **Order Modes** function.

Creating an order entry queue for Aloha Takeout

You must create an order entry queue in the Aloha POS system exclusively for use with ATO orders. Aloha Takeout stores orders to the defined 'takeout' queue, when finalizing new orders. The system recalls an order from the 'takeout' queue to the local terminal queue each time you access the order. Re-finalizing a recalled order returns it to the 'takeout' queue.



Tip

When you run the Configuration Utility, the system automatically creates an 'ATO' order entry queue each for Aloha Quick Service and Aloha Table Service.



Caution

Aloha Takeout is unable to store orders on the queue in Table Service if the queues selected in the POS and Takeout settings are not the same. This usually results in the 'blue' unfinalized orders on the Pick Up or Dispatch screen. You must match the takeout queue in POS delivery function and Aloha Takeout for the system to function correctly.

Aloha Takeout is unable to store orders on the queue in Table Service if the queues selected in the POS and Takeout settings are not the same. This usually results in the 'blue' unfinalized orders on the Pick Up or Dispatch screen. You must match the takeout queue in POS delivery function and Aloha Takeout for the system to function correctly.



Figure 1 - 15 Order Entry Queue Maintenance (Table Service)

| Order Entry Queue | |
|---|-------------------------------------|
| Order Entry Queue: 11 Takeout | |
| Settings | |
| Number | 11 |
| Name | Takeout |
| Default order mode | None |
| Is table | None |
| Auto close | <input type="checkbox"/> |
| Auto print | <input type="checkbox"/> |
| Auto open new order | <input type="checkbox"/> |
| Exempt from modifier flow | <input checked="" type="checkbox"/> |
| Maximum number of open orders | 255 |
| Minimum order number | 1 |
| Maximum order number | 999 |
| Order number prefix text | |
| Redirect tender actions to review check | <input type="checkbox"/> |
| Print individual seat checks | <input type="checkbox"/> |
| Speed of service | |
| Speed of service | None |
| Number of seconds for yellow indicator | 0 |
| Number of seconds for red indicator | 0 |

Figure 1 - 16 Order Entry Queue Maintenance (Quick Service)

To create an order entry queue:

1. Select **Maintenance > System Settings > Order Entry Queue**.
2. Click **New** to create a new order entry queue exclusively for Aloha Takeout.
3. Type a **name** that is easily recognized for use with Aloha Takeout. If you are using Table Service, skip to step 9. For Quick Service, continue with step 4.
4. Under the 'Settings' group bar, click the 'Default order mode' drop-down arrow and select an **order mode** you created for use with Aloha Takeout.
5. Clear **Auto open new order**.
6. Type a **maximum number of open orders**, up to 255.
7. Type a minimum and maximum **order number**.
8. Type a **prefix** that identifies orders on the 'Takeout' queue in 'Order number prefix text.'
9. Click **Save** and exit the **Order Entry Queue** function.

For Table Service operations, Aloha Takeout uses the delivery functionality inherent to the Aloha POS system for communication. You must align the order entry queue you defined for takeout within this function.



Tip

Skip this procedure if you are using Quick Service.

To align the takeout order entry queue with the POS delivery function:

1. Select the **Table Service icon** from the Product panel and select **Maintenance > Business > Store > Store Settings** tab (Figure 1 - 13).
2. Select the **Delivery group** at the bottom of the screen.
3. Under the 'Setup' group bar, select **Enable Aloha Delivery**.
4. Select the **order entry queue** you created for use with Aloha Takeout from the 'Delivery order queue' drop-down list.



Tip

A job code becomes a 'delivery' job code when you select 'Delivery driver,' 'Delivery dispatcher,' or 'Delivery order taker' in Maintenance > Labor > Jobcodes > Order Entry tab > Delivery group bar.

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

To align the POS order entry queue in ATO:

1. Select **Maintenance > Takeout Configuration > Takeout Settings**.
2. Select the **Takeout** tab.

The screenshot shows the 'Takeout Settings' window. The 'Takeout' tab is selected. The 'Takeout and Delivery Queue' group bar is highlighted with a red circle. The 'Queue' dropdown menu is open, showing 'Takeout' selected. The 'Identification' group bar is also visible, showing 'Number' as 1, 'Name' as 'Takeout Settings', and 'POS Type' as 'Table Service'. The 'Cash Accounts' group bar is also visible, showing 'Cash to driver' as 'Driver Bank', 'Cash to store' as 'Driver Drop', 'Cash from driver' as 'Drop Rcvd', and 'Cash from store' as 'Bank Fund'.

Figure 1 - 17 Takeout and Delivery Queue Group Bar

3. Under the 'Takeout and Delivery Queue' group bar, select the **queue** you created for use with Aloha Takeout from the 'Queue' drop-down list.



Tip

When you run the Configuration Utility, the system automatically selects the queue to use with Aloha Takeout from the 'Queue' drop-down list.

4. Click **Save** and exit the **Takeout Settings** function.

Creating POS job codes, access levels and employees for Aloha Takeout

You must create job codes for use with Aloha Takeout, usually based on the roles of the employee using the system. The size, layout, and policies of an operation, as well as the number of employees, determine the job codes and associated configuration requirements you need to create. You may need to configure a separate job code for each Aloha Takeout employee role, defined below, or you may be able to combine the responsibilities of more than one employee role into the same job code. Another option is to modify the existing POS job codes, such as servers, bartenders, cashiers, and hosts, to accommodate the functions of Aloha Takeout employee roles.



Tip

When you run the Configuration Utility, the system automatically creates job codes, access levels, and interface employees for you.

| Employee Roles: | Suggested Abbreviation | Responsibilities: |
|----------------------------|------------------------|--|
| Interface Employees | IE | Used “behind the scenes” by Aloha Connect to release future orders and assign orders to drivers. Also referred to as a “virtual employee,” the interface employee plays an important role in the ATO environment and is mandatory in most configurations. |
| Order Takers | OT | Greet customers at the counter or answer the phone, create or locate existing customers, create orders, and associate payment information to an order. Recalling and editing current and future day orders may also be needed. In some operations, order takers also perform cashier functions and require cash drawer access. |
| Takeout Cashiers | CSHR | Collect payment from customers arriving to pick up orders. May also provide driver bank, drop, and checkout functions, add or edit customers, and perform order taker functions. Cashiers require cash drawer access and assignment. |
| Dispatchers | DISP | Manage the organization and assignment of delivery orders, monitor delivery food production and assembly. Driver management, dispatch, and return are often handled by the dispatcher. Dispatchers may be limited to viewing only the Dispatch and Drivers screens in Aloha Takeout. |
| Drivers | DRVR | Organize and pack orders at the store and walk, ride, or drive an order to a customer’s location, collect payment from the customer, are accountable, at checkout, for the orders they delivered. Drivers may also fulfill order taker and dispatch functions. |

The following job code configurations are intended to provide minimum guidelines for each employee role in the Aloha Takeout environment. Adapt and combine options to meet your specific operational needs.



Tip

For each job code you create, we recommend you “mirror” that job code configuration for the training equivalent of that employee role, with the addition that you must also select the ‘Training’ option located on the Job Code tab.

| Jobcodes | |
|---|-------------------------------------|
| Jobcode: 60 Driver | |
| Jobcode Order Entry Financial Takeout | |
| Identification | |
| Number | 60 |
| Name | Driver |
| Description | Delivery Driver |
| POS icon | None |
| Job Group | Job Group 60 |
| Job Group for tip share | Job Group 60 |
| Training mode (unpaid) | <input type="checkbox"/> |
| Time and Attendance | |
| Shift required to clock in/out | <input checked="" type="checkbox"/> |
| Automatically clock in/out when ringing an order | <input type="checkbox"/> |
| Exclude from Labor Scheduling | <input checked="" type="checkbox"/> |
| Export code | <input type="checkbox"/> |
| Suppress the shift time out on printed schedule on FOH | <input type="checkbox"/> |
| Enable prompt for punch adjustment acknowledgement | <input type="checkbox"/> |
| Enable prompt for sales and tip distribution adjustment | <input type="checkbox"/> |

Figure 1 - 18 Jobcodes - Jobcode Tab

| Jobcodes | |
|---|-------------------------------------|
| Jobcode: 60 Driver | |
| Jobcode Order Entry Financial Takeout | |
| Order entry | |
| Order entry | <input checked="" type="checkbox"/> |
| Interface | <input type="checkbox"/> |
| Bartender | <input type="checkbox"/> |
| Cashier | <input type="checkbox"/> |
| Order taker | <input checked="" type="checkbox"/> |
| Check type | Tabs |
| Require tab name | <input type="checkbox"/> |
| Pivot seating | <input type="checkbox"/> |
| Can get checks from other employees | <input checked="" type="checkbox"/> |
| Automatically return checks to original owner | <input type="checkbox"/> |
| Go directly to get check, followed by close screen | <input type="checkbox"/> |
| Automatically exit on close check | <input type="checkbox"/> |
| Allow item lookup | <input type="checkbox"/> |
| Prompt for order mode | <input type="checkbox"/> |
| Default order mode | None |
| Can start PMS check | <input type="checkbox"/> |
| Exclude Takeout employees from checkout restriction | <input checked="" type="checkbox"/> |
| Team service get check | |
| Can view and access all team checks | <input type="checkbox"/> |

Figure 1 - 19 Jobcodes - Order Entry Tab

| Screens | | |
|-----------------------|---------------------|-------------------------------------|
| TS Use floorplan | | <input checked="" type="checkbox"/> |
| TS Screen | Takeout | |
| QS Order entry screen | Default to Terminal | |
| QS Order entry queue | Takeout | |
| QS Screen timeout | 0 | |
| QS No default screen | | <input type="checkbox"/> |

| Delivery | | |
|---|--|-------------------------------------|
| Delivery driver | | <input checked="" type="checkbox"/> |
| Can assign orders to self | | <input checked="" type="checkbox"/> |
| Prompt for mileage | | <input checked="" type="checkbox"/> |
| Delivery dispatcher | | <input checked="" type="checkbox"/> |
| Delivery order taker | | <input checked="" type="checkbox"/> |
| TS Cannot adjust recalled closed checks | | <input type="checkbox"/> |

Figure 1 - 20 Jobcodes - Order Entry Tab (Cont)

| Jobcodes | | |
|--|----------|-------------------------------------|
| Jobcode: 11 Driver | | |
| Jobcode Order Entry Financial Takeout | | |
| Financial | | |
| Uses cash drawers | | <input type="checkbox"/> |
| QS Self banking | | <input checked="" type="checkbox"/> |
| QS Can assign self to cash drawer | | <input type="checkbox"/> |
| Reconcile payments at checkout | | <input type="checkbox"/> |
| Display unused tender types | | <input type="checkbox"/> |
| Audit selected coupons | | <input type="checkbox"/> |
| Tips | | |
| Must declare tips at clockout | | <input type="checkbox"/> |
| Low tip threshold amount | 0 | |
| Low tip warning message | Default | |
| Auto-declare tips if clock out doesn't occur | | <input type="checkbox"/> |
| Report settings | | |
| Do not print or export | | <input type="checkbox"/> |
| Do not update FOH Flash Report | | <input checked="" type="checkbox"/> |
| Calculate jobcode as days | | <input type="checkbox"/> |
| Hourly sales and labor report | | |
| Revenue center | Delivery | |
| Security | | |
| Uses password | | <input type="checkbox"/> |
| Automatically perform checkout when clocking out | | <input type="checkbox"/> |
| Require manager approval for Checkout | | <input type="checkbox"/> |
| Require manager approval for Clockout | | <input type="checkbox"/> |
| QS Clockin not required for manager approval functions | | <input type="checkbox"/> |

Figure 1 - 21 Jobcodes - Financial Tab

| Jobcodes | | |
|---|------------------|-------------------------------------|
| Jobcode: 60 Driver | | |
| Jobcode Order Entry Financial Takeout | | |
| Settings | | |
| Used by Takeout | | <input checked="" type="checkbox"/> |
| Driver | | <input checked="" type="checkbox"/> |
| Driver fee on split check | | <input type="checkbox"/> |
| Enable variable driver fee | | <input type="checkbox"/> |
| Show Takeout on login | | <input checked="" type="checkbox"/> |
| Display 'Aloha' button | | <input checked="" type="checkbox"/> |
| Aloha Takeout initial order filter | None | |
| 1st generation return screen | Terminal Default | |
| 2nd generation return screen | Terminal Default | |
| QS Aloha return screen | None | |
| Screens | | |
| Screen name | | |
| Driver Dispatch | | |
| Driver Management | | |
| | | Add |
| | | Remove |

Figure 1 - 22 Jobcodes - Takeout Tab

Maintenance > Labor > Jobcodes

| Suggested Settings: POS Job Codes | IE | OT | CSHR | DISP | DRVR |
|---|-----|-----------------|--------------|-----------------|-------------------|
| Jobcode tab | | | | | |
| Shift required to clock in/out | √ | √ | √ | √ | √ |
| Exclude from Labor Scheduling | √ | | | | |
| Order Entry tab | | | | | |
| Order entry | √ | √ | √ | | |
| Can get checks from other employees | √ | √ | √ | √ | √ |
| Exclude Takeout Employees from checkout restriction | √ | | | | |
| Order Entry Screen (QS) | | √ | √ | | √ |
| Order Entry Queue (QS) | √ | √ | | | √ |
| Check Type (TS) | | √ | √ | √ | √ |
| Use Floor Plan (TS) | | √ | √ | √ | √ |
| Delivery driver | | | | | Optional |
| Can assign order to self | | | | | N/A |
| Prompt for mileage | | | | | Optional |
| Delivery dispatcher | | | | | |
| Delivery order taker | √ | √ | √ | √ | √ |
| Financial tab | | | | | |
| Uses cash drawers | √ | √ | √ | | |
| Self banking | √ | | | | √ |
| Takeout tab | | | | | |
| Used by Takeout | √ | √ | √ | √ | √ |
| Driver | | | | | √ |
| Show Takeout on login | | √ | | √ | √ |
| Aloha Takeout initial order filter | N/A | Open | Open | Unassigned | Driver |
| 1st generation return screen. This option is no longer used in ATO v12.1. | N/A | N/A | N/A | N/A | N/A |
| 2nd generation return screen | N/A | Customer Lookup | Order Pickup | Driver Dispatch | Driver Management |

| Suggested Settings: POS Job Codes | IE | OT | CSHR | DISP | DRVR |
|-----------------------------------|-----|-----|------|--|---|
| Screens | N/A | All | All | Driver Dispatch and Driver Management | Driver Dispatch and Driver Management |

You must attach an access level to an employee. You can use an existing access level, but most likely you will create a new access level specifically for an Aloha Takeout employee. Use the table below to create and configure access levels to meet your operational needs.

| Aloha Takeout | | |
|--|--|-------------------------------------|
| Can override order capacity | | <input checked="" type="checkbox"/> |
| Can override restricted dispatch | | <input checked="" type="checkbox"/> |
| Can override 'No order assignment until after bump' | | <input checked="" type="checkbox"/> |
| Can override 'Required Aloha Loyalty member ID for n... | | <input checked="" type="checkbox"/> |
| Authorize deposit refunds | | <input checked="" type="checkbox"/> |
| Authorize deposit surrender | | <input checked="" type="checkbox"/> |
| Driver management | | <input checked="" type="checkbox"/> |
| Approve driver to driver transfers | | <input checked="" type="checkbox"/> |
| Change promise time for active orders | | <input checked="" type="checkbox"/> |
| Can adjust order mode charges | | <input checked="" type="checkbox"/> |
| Can adjust quote time | | <input checked="" type="checkbox"/> |
| Can override delivery area restrictions | | <input checked="" type="checkbox"/> |
| Can add customer credit | | <input checked="" type="checkbox"/> |
| Can add/edit tax exemptions | | <input checked="" type="checkbox"/> |
| Can override 'Require e-mail for new guests' | | <input checked="" type="checkbox"/> |
| Can override tax locale | | <input checked="" type="checkbox"/> |
| Can edit guest name | | <input checked="" type="checkbox"/> |
| Can override 'Require customer first name' | | <input checked="" type="checkbox"/> |
| Can override 'Require customer last name' | | <input checked="" type="checkbox"/> |
| Can override 'Require customer address' | | <input checked="" type="checkbox"/> |
| Can override 'Require state for address' | | <input checked="" type="checkbox"/> |
| Can override 'Require company name for office address' | | <input checked="" type="checkbox"/> |
| Can override 'Require zip code for address' | | <input checked="" type="checkbox"/> |
| Can override 'Require phone number' | | <input checked="" type="checkbox"/> |
| Can override 'Require extension for guest office phon... | | <input checked="" type="checkbox"/> |
| Can override 'Always refund deposit to original tender' | | <input checked="" type="checkbox"/> |
| Can add/edit fiscal ID | | <input checked="" type="checkbox"/> |

Figure 1 - 23 POS Access Levels - Aloha Takeout Group Bar

| Employee | | |
|--|--|-------------------------------------|
| Approve clock in | | <input checked="" type="checkbox"/> |
| Approve checkout | | <input checked="" type="checkbox"/> |
| Delete checkout | | <input checked="" type="checkbox"/> |
| Approve clock out | | <input checked="" type="checkbox"/> |
| Delete clock out | | <input checked="" type="checkbox"/> |
| Approve start/end breaks | | <input checked="" type="checkbox"/> |
| Clear password | | <input checked="" type="checkbox"/> |
| Enroll fingerprints | | <input checked="" type="checkbox"/> |
| Force reconciliation | | <input checked="" type="checkbox"/> |
| Force coupon audit | | <input checked="" type="checkbox"/> |
| Open any drawer | | <input checked="" type="checkbox"/> |
| QS De-assign drawers | | <input checked="" type="checkbox"/> |
| QS Enter open items | | <input checked="" type="checkbox"/> |
| Access quick count screens and reports | | <input checked="" type="checkbox"/> |
| Enter pay adjustments | | <input checked="" type="checkbox"/> |
| TS Adjust tip share | | <input checked="" type="checkbox"/> |
| Release locked employee | | <input checked="" type="checkbox"/> |
| Edit FOH labor | | <input checked="" type="checkbox"/> |
| Assign pen ID's | | <input checked="" type="checkbox"/> |
| Approve interactive message response | | <input checked="" type="checkbox"/> |

Figure 1 - 24 POS Access Level - Employee Group Bar

| Financial | | |
|--|--|-------------------------------------|
| Assign promo | | <input checked="" type="checkbox"/> |
| Delete promo | | <input checked="" type="checkbox"/> |
| Assign comp | | <input checked="" type="checkbox"/> |
| Delete comp | | <input checked="" type="checkbox"/> |
| Assign gratuity | | <input checked="" type="checkbox"/> |
| Delete gratuity | | <input type="checkbox"/> |
| Assign menu | | <input checked="" type="checkbox"/> |
| Assign day part | | <input checked="" type="checkbox"/> |
| Members override | | <input type="checkbox"/> |
| View tables | | <input checked="" type="checkbox"/> |
| Manager transfer tables | | <input checked="" type="checkbox"/> |
| Split checks | | <input checked="" type="checkbox"/> |
| Split seat | | <input checked="" type="checkbox"/> |
| Reopen check | | <input checked="" type="checkbox"/> |
| Reprint check | | <input checked="" type="checkbox"/> |
| Void items | | <input checked="" type="checkbox"/> |
| Cash drawers | | <input checked="" type="checkbox"/> |
| Cash drawer checkout | | <input checked="" type="checkbox"/> |
| Approve cash drops | | <input type="checkbox"/> |
| Allow cash drops on behalf of self-banking employees | | <input type="checkbox"/> |
| Resend chit to kitchen | | <input type="checkbox"/> |
| Item availability | | <input checked="" type="checkbox"/> |
| Override category limits | | <input type="checkbox"/> |
| Delete payments | | <input checked="" type="checkbox"/> |
| Adjust payments | | <input checked="" type="checkbox"/> |
| No sale | | <input checked="" type="checkbox"/> |

Figure 1 - 25 POS Access Levels - Financial Group Bar

| | | |
|--|------|-------------------------------------|
| Cash refunds | | <input checked="" type="checkbox"/> |
| Non-cash refunds | | <input type="checkbox"/> |
| Credit card refunds | | <input checked="" type="checkbox"/> |
| Manual card number | | <input checked="" type="checkbox"/> |
| Force payment authorization | | <input checked="" type="checkbox"/> |
| Approve offline hotel charges | | <input type="checkbox"/> |
| Override security verifications on tenders | | <input type="checkbox"/> |
| Resend failed credit card transaction | | <input type="checkbox"/> |
| Override gift card restrictions | | <input type="checkbox"/> |
| Enable cash out from gift card | | <input type="checkbox"/> |
| Approve additional Aloha Loyalty member transactions | | <input type="checkbox"/> |
| Approve manual Aloha Loyalty card number | | <input type="checkbox"/> |
| Approve Aloha Loyalty card assignment | | <input type="checkbox"/> |
| Approve Aloha Loyalty member lookup | | <input type="checkbox"/> |
| Apply tax exempt | | <input checked="" type="checkbox"/> |
| <u>Restricted tender group for this access level</u> | None | |
| Override maximum number of refills | | <input type="checkbox"/> |
| Assign price change | | <input type="checkbox"/> |
| Edit event tax | | <input type="checkbox"/> |
| Override split check limits | | <input type="checkbox"/> |
| Edit price change events | | <input type="checkbox"/> |
| Override EMV verifications | | <input type="checkbox"/> |
| Distribute Sales and Tips | | <input type="checkbox"/> |
| Manage Sales and Tip Distribution Teams | | <input type="checkbox"/> |

Figure 1 - 26 POS Access Levels - Financial Group Bar (Cont)

Maintenance > Labor > POS Access Levels

| Suggested Settings: POS Access Levels | IE | OT | CSHR | DISP | DRVR | MGR |
|--|----|----|------|------|------|-----|
| Aloha Takeout group bar | | | | | | |
| Can override order capacity | ✓ | | | ✓ | | ✓ |
| Can override restricted dispatch | ✓ | | | ✓ | | ✓ |
| Can override 'No order assignment until after bump' | ✓ | | | ✓ | | ✓ |
| Can override 'Required Loyalty Member ID for new guests' | ✓ | | | | | ✓ |
| Authorize deposit refunds | ✓ | | | | | ✓ |
| Authorize deposit surrender | ✓ | | | | | ✓ |
| Driver management | ✓ | | | ✓ | | ✓ |
| Approve driver to driver transfers | ✓ | | | ✓ | | ✓ |
| Change promise time for active orders | ✓ | ✓ | | | | ✓ |
| Can adjust order mode changes | ✓ | | | | | ✓ |
| Can adjust quote time | ✓ | | | | | ✓ |
| Can override delivery area restrictions | ✓ | | | ✓ | | ✓ |
| Can add customer credit | ✓ | | | | | ✓ |
| Can add/edit tax exemptions | ✓ | | | | | ✓ |
| Can override 'Require e-mail for new guests' | ✓ | ✓ | ✓ | | | ✓ |
| Can override tax locale | ✓ | | | | | ✓ |
| Can edit guest name | ✓ | | | | | ✓ |
| Can override 'Require customer first name' | ✓ | | | | | ✓ |
| Can override 'Require customer last name' | ✓ | | | | | ✓ |
| Can override 'Require customer address' | ✓ | | | | | ✓ |
| Can override 'Require state for address' | ✓ | | | | | ✓ |
| Can override 'Require company name for office address' | ✓ | | | | | ✓ |
| Can override 'Require zip code for address' | ✓ | | | | | ✓ |
| Can override 'Require phone number' | ✓ | | | | | ✓ |
| Can override 'Require extension for guest office phone' | ✓ | | | | | ✓ |

| Suggested Settings: POS Access Levels | IE | OT | CSHR | DISP | DRVR | MGR |
|---|----|----|------|------|------|-----|
| Can override 'Always refund deposit to original tender' | √ | | | | | √ |
| Can add/edit fiscal ID | √ | | | | | √ |
| Financial group bar | | | | | | |
| Apply tax exempt | √ | √ | | | | √ |
| Split checks | √ | | | | | √ |
| Reopen check | √ | | | | | √ |
| Void Items | √ | √ | √ | | | √ |
| Delete payments | √ | | | | | √ |
| Adjust payments | √ | | | | | √ |
| No sale | √ | | √ | | | √ |
| Cash refunds | √ | | | | | √ |
| Non-cash refunds | √ | | | | | √ |
| Credit card refunds | √ | | | | | √ |
| Employee group bar | | | | | | |
| Approve clock in | √ | | √ | | √ | √ |



Reference

Refer to [Configuring printing with ATO](#) for more information about the Deposits feature, and how to enable and configure the Aloha POS system and Aloha Takeout to support it.

You must create new employees specifically for the Aloha Takeout functionality, as well as modify job codes assigned to existing employees so they can perform certain ATO functions.

Aloha Takeout requires the following new employees when adding Aloha Takeout to a system.

- **Interface employees** — Create one **interface employee** for each ATO terminal on your system. ATO uses interface employees to release future and online orders, and facilitate driver assignment and dispatch.
- **Training interface employees** — Create one **training interface employee** for each ATO terminal on your system. Similar to interface employees defined above, ATO uses these employees to perform the same functions on training ATO orders.
- **Dummy training employees** — Create some dummy drivers, order takers, cashiers, dispatchers, etc. depending on your operation, that a new employee can clock in and use to understand the flow of takeout orders within your system.

We recommend you modify the following job codes or create new ones to perform certain Aloha Takeout functions.

- **Order takers** — Add the ATO order taker job code to existing employees.
- **Cashiers** — Add the ATO cashier job code to existing employees.
- **Drivers** and **Dispatchers** — In delivery operations, add the ATO driver or dispatcher job code to selected employees.

Maintenance > Labor > Employees

| Suggested Settings: POS Employees | IE | OT | CSHR | DISP | DRVR |
|-----------------------------------|----|----------|----------|----------|----------|
| Employee tab | | | | | |
| Use magnetic cards | √ | Optional | Optional | Optional | Optional |
| Jobcodes tab | | | | | |
| Jobcode | √ | √ | √ | √ | √ |
| Access level | √ | √ | √ | √ | √ |
| Current pay rate | √ | √ | √ | √ | √ |
| Delivery tab | | | | | |
| Driver fee amount per order | | | | | Optional |
| Driver fee percent | | | | | Optional |
| Driver fee per mile | | | | | N/A |
| Drivers license expiration date | | | | | Optional |
| Insurance expiration date | | | | | Optional |

To create ATO employees in the Aloha POS system:

1. Select **Maintenance > Labor > Employees**.

The screenshot shows the 'Employees' window in the Aloha POS system. At the top, there's a title bar 'Employees' and a dropdown menu for 'Employee:' set to '601 One Driver POS only'. Below this is a tabbed interface with 'Employee', 'Status', 'Jobcodes', 'Delivery', 'Tax', and 'Custom Settings'. The 'Employee' tab is active, showing a 'Personal information' group bar. The fields under this group bar are: POS Employee number (601), System access (POS only), Social security number (601-66-6666), Last name (One), First name (Driver), Middle name, Nick name (Driver), Birth date (None), Export ID (0), Address 1, Address 2, Address 3, Address 4, City/town, State (None), County (None), Postal code, Email address, Phone number, and a checkbox for 'Prefers qwerty keyboard'.

Figure 1 - 27 Employee - Employees Tab

2. Click the **New** drop-down arrow, select **POS only**, and click **OK**.
3. Under the 'Personal information' group bar, type a **Social security number**. This entry may be random, but must be unique.
4. Type a **name** to easily identify an interface employee. Example, 'ATOIT1' for terminal 1.

5. Select the **Jobcodes** tab.

| Jobcode | Access level | Current pay rate |
|---------|--------------|------------------|
| ATO Int | MANAGER | 0.00 |

Buttons: Add, Remove, Move up, Move down, Jobcode, Access level

| Effective date | Pay rate | End date | Modified date |
|----------------|----------|----------|---------------|
| 8/16/2013 | 0.00 | None | 8/16/2013 |

Buttons: Add, Remove

Figure 1 - 28 Employee - Jobcodes Tab

6. Select the **ATO interface job code** from the drop-down list.
7. Select the **ATO interface access level** from the drop-down list.
8. Leave the **Current pay rate** as the 0.00 default value.
9. Click **Save**.
10. Repeat the **steps above** for each interface employee.



Tip

Create one interface employee for each interface terminal.

11. Repeat the **steps above** to create training interface employees, except select the '**training interface job code**' on step 6.
12. Repeat the **steps above** for 'dummy' ATO employees to use for training purposes. Select the appropriate job code (driver, dispatcher, order taker, etc.).

To add job codes to employees that use Aloha Takeout:

1. Select **Maintenance > Labor > Employees** and select an **employee** that interacts with Aloha Takeout from the 'Employee' drop-down list.
2. Select the **Jobcodes** tab.
3. Select a **job code** you configured to work with Aloha Takeout from the drop-down list.
4. Select an **access level** you configured to work with Aloha Takeout from the drop-down list.

5. For drivers, select the **Delivery** tab.
6. Under the 'Delivery information' group bar, enter the following, if necessary:
 - Type the **Driver fee amount** per order to reduce the Net Cash Owed on a drivers checkout by the entered amount per order.
 - Type the **Driver fee percent** to reduce the Net Cash Owed on a drivers checkout based on the entered percentage of each delivery checks subtotal.
 - Type the **Driver fee per mile** to prompt for the starting mileage at clock in and ending mileage at clock out. The net mileage appears on the labor report for payroll to calculate driver reimbursement based on an agreed mileage rate.
 - Select the **Drivers license expiration date** drop-down list and select a **date** from the calendar that appears. Use the arrows to move between months and years.
 - Select the **Insurance expiration date** drop-down list and select a **date** from the calendar that appears. Use the arrows to move between months and years.



Note

Delivery fees and driver fees are not related.

7. Repeat **this procedure** for each employee that uses Aloha Takeout.
8. Click **Save** and exit the **Employees** function.

| Employee - Driver, Driver 1 | |
|--|--|
| Employee: 601 Driver Driver 1 POS only QS 6.7 Master | |
| Employee | Status Jobcodes Delivery Tax Custom Settings |
| Delivery information | |
| Driver fee amount per order | 0.00 |
| Driver fee percent | 0.00 |
| Driver fee per mile | 0.20 |
| Drivers license expiration date | 1/1/2012 |
| Insurance expiration date | 1/1/2012 |

Figure 1 - 29 Employee - Delivery Tab

Creating interface terminals

Aloha Takeout uses interface terminals to interact with order entry terminals, in combination with interface employees and job codes, to monitor and manage customer records and orders. As stated previously, we recommend giving these entities 'terminal-centric' names, to make configuration and trouble-shooting easier.

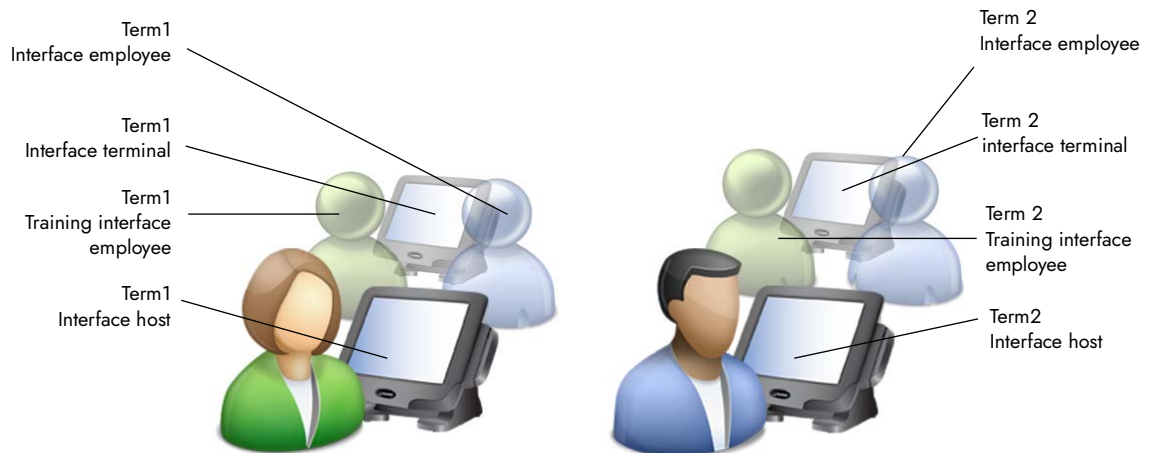


Figure 1 - 30 Interface Terminals



Tip

When you run the Configuration Utility, the system automatically creates interface terminals and interface server for you.

You need to create one interface terminal for each POS order entry terminal on which you intend to install and run Aloha Takeout.

1. Select **Maintenance > Hardware > Terminals**.
2. Create a **new terminal** and type a **name** that references the physical terminal to which it relates. Terminal names may be site- or company-specific, but if you select names that relate to each other for physical and interface pairs, it will make database configuration much easier for you.
Example: Name the interface terminal for Term1 "ATO IT1."

- Under the 'Settings' group bar, select **Radiant interface terminal** from the 'Function' drop-down list.

| Settings | |
|----------------|----------------------------|
| Model | Radiant |
| Function | Radiant interface terminal |
| Interface host | BAR |

Figure 1 - 31 Terminals - Terminal Tab - Settings Group Bar

- Under the 'Other' group bar, select the same **revenue center** to which you assigned the physical 'Interface Host' terminal from the 'Revenue Center' drop-down list.

| Other | |
|----------------|------|
| Revenue center | MAIN |
| Terminal queue | None |
| Order mode | None |
| EDC info | |

Figure 1 - 32 Terminals - Terminal Tab - Other Group Bar

- For Quick Service operations, select the '**takeout**' **queue** for the interface terminal from the 'Queue' drop-down list.
- Select the **order entry terminal** to which to associate the interface terminal from the 'Interface host' drop-down list.
- Under the 'Aloha Takeout' group bar, select the **employee** you created specifically for use with this interface terminal from the 'Interface employee' drop-down list.
ATO uses the first job code for the employee as the 'interface job code.'

| Aloha Takeout | |
|---|--------------------------|
| Interface employee | ATOIT1, ATOIT1 |
| 1st generation return screen | Customer Management |
| 2nd generation return screen | Customer Lookup |
| Aloha return screen | None |
| Aloha tender screen | None |
| Keyboard present | <input type="checkbox"/> |
| Training interface employee | Interface1, T1Training |
| Show Takeout on login | <input type="checkbox"/> |
| Enable advanced mapping | <input type="checkbox"/> |
| Check in summary | ATOterminal |
| Select check in summary based on terminal routing | <input type="checkbox"/> |

Figure 1 - 33 Terminals - Terminal Tab - Aloha Takeout Group Bar

- Select the **return screen** from the '2nd generation return screen' drop-down list. Disregard the 1st generation return screen, as it is obsolete.
- Clear **Keyboard present**.
- Select the **training employee** you created specifically for use with this terminal from the 'Training interface employee' drop-down list.

ATO uses the first job code for the employee as the 'training interface job code.'

11. Select **Show Takeout on login**, if the terminal is located in a takeout area and you would like the ATO screen to appear for all employees logging in to this terminal.
12. Click **Save**.
13. Repeat **this procedure** for each terminal. In most cases, you will repeat this procedure for all 'order entry' terminals in your restaurant.



Note

There are no separate licensing requirements or fees for Radiant interface terminals created in support of Aloha Takeout. The license for Aloha Takeout is sufficient for these virtual terminals. This type of terminal is available in Aloha v6.2.15 or later. You can install Aloha Takeout on all terminals without additional license costs.

14. Exit the **Terminals** function.

Creating petty cash accounts for drivers

You need a total of four **petty cash accounts** to monitor cash moving to and from delivery drivers, and into and out of cash drawers.

| Petty Cash Account Options | | | |
|----------------------------|-------------|---------|---|
| Petty Cash Account | Paid out/in | Affects | Takeout Settings > Takeout tab > Deposits > Cash Accounts |
| Driver Bank | Paid in | Driver | Cash to driver |
| Driver Drop | Paid out | Driver | Cash to store |
| Drop Recv'd | Paid in | Cashier | Cash from driver |
| Bank Fund | Paid out | Cashier | Cash from store |

Driver bank functions (cash distributed to drivers) provide cash for drivers to make change during the initial deliveries of their shift, if needed. Driver 'banks' increase the cash liability for drivers, and decrease cash liability for the cashier.

Cash To Driver — Select 'Cash To Driver,' to designate this as the petty cash account to use when moving "starting bank" money from the cash drawer to the driver, *from the perspective of the driver*.

Cash From Store — Select 'Cash From Store,' to designate this as the petty cash account to use when moving "starting bank" money from the cash drawer to the driver, *from the perspective of the cashier*.

Driver drop functions (cash received in the store from drivers) reduce the cash liability for drivers, and increase cash liability for the cashier accepting the drop. Driver drops are very important, as they help prevent theft or driver assault.

Cash To Store — Select 'Cash To Store,' to designate this as the petty cash account to use when the cashier receives money from the driver, *from the perspective of the driver*.

Cash From Driver — Select 'Cash From Driver' to designate this as the petty cash account to use when the cashier receives money from the driver, *from the perspective of the cashier*.

To create petty cash accounts for use with Aloha Takeout:

1. Select **Maintenance > System Settings > Petty Cash Account**.
2. Create **four petty cash accounts** as shown:

The screenshot shows the 'Petty Cash Account' settings for '11 Driver Bank'. The 'Settings' section includes: Number (11), Name (Driver Bank), Account Type (Paid out), Affects total cash owed (checked), and Starting bank (checked). The 'Report as non-cash tender' checkbox is unchecked.

Figure 1 - 34 Driver Bank Petty Cash Account

The screenshot shows the 'Petty Cash Account' settings for '12 Driver Drop'. The 'Settings' section includes: Number (12), Name (Driver Drop), Account Type (Paid out), Affects total cash owed (checked), and Report as non-cash tender (checked). The 'Starting bank' checkbox is unchecked.

Figure 1 - 35 Driver Drop Petty Cash Account

The screenshot shows the 'Petty Cash Account' settings for '13 Drop Recv'd'. The 'Settings' section includes: Number (13), Name (Drop Recv'd), Account Type (Paid in), Affects total cash owed (checked), and Starting bank (checked). The 'Report as non-cash tender' checkbox is unchecked.

Figure 1 - 36 Drop Received Petty Cash Account

The screenshot shows the 'Petty Cash Account' settings for '14 Bank Fund'. The 'Settings' section includes: Number (14), Name (Bank Fund), Account Type (Paid out), Affects total cash owed (checked), and Report as non-cash tender (checked). The 'Starting bank' checkbox is unchecked.

Figure 1 - 37 Bank Fund Petty Cash Account

3. Click **Save** and exit the **Petty Cash Account** function.

To align POS petty cash accounts with Aloha Takeout:

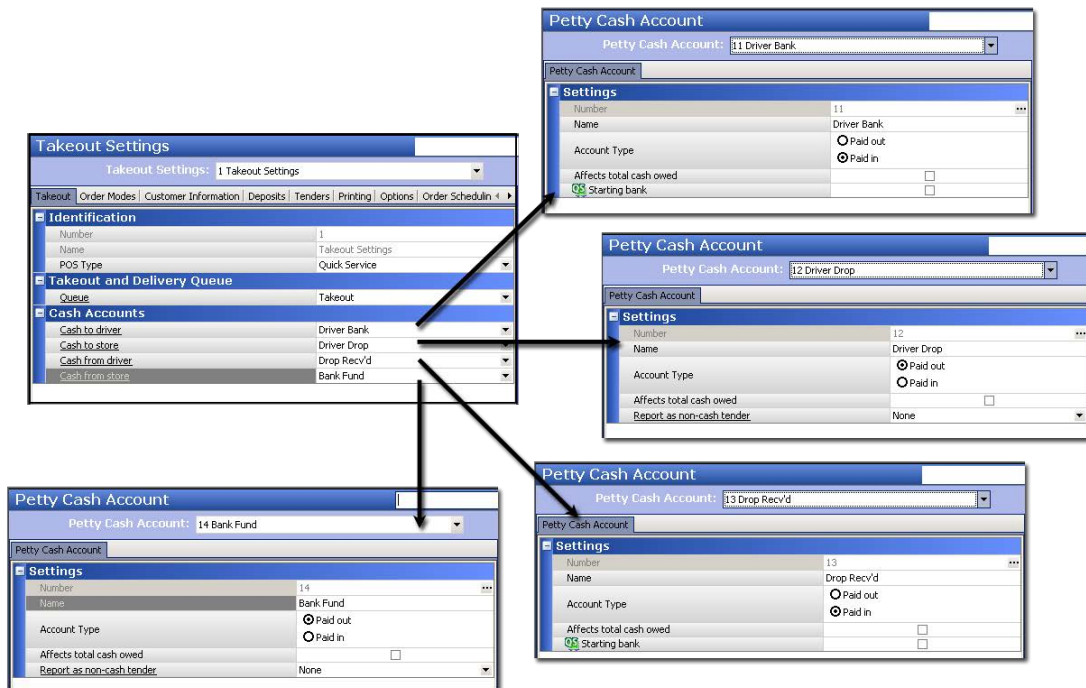


Figure 1 - 38 POS Petty Accounts Alignment with Aloha Takeout

1. Select **Maintenance > Takeout Configuration > Takeout Settings**.
2. Under the 'Cash Accounts' group bar, align each **cash account** to the petty cash accounts defined in the POS for Aloha Takeout.
3. Click **Save**.



Caution

You must use Aloha POS v6.7 or later for cash drawer detection.

Creating tenders for Aloha Takeout

In addition to credit card and cash tenders, it is necessary to create other tenders to support ATO functionality. These include:

A **house account tender** allows you to use POS house accounts with Aloha Takeout.

A **prepaid tender** allows you to pay and close orders placed by a delivery service.

A **deposit tender** reduces the balance due on the check by the deposit amount previously paid by the guest.

A **tippable credit card tender** allow customers to tip drivers in a delivery operation. Quick and counter service operations typically do not have tippable tenders, thus it may be necessary to create a tippable tender.

Once you define the above tenders, specify the POS tenders available in ATO.

To create a house account tender:

1. Select **Maintenance > Payments > Tenders > Tender** tab.
2. Click the **New** drop-down arrow, select **House Accounts** as the tender type, and click **OK**.

The screenshot shows the 'Tenders' configuration window in Aloha Takeout. The 'Tender' dropdown is set to '41 POS House House account'. The 'Settings' tab is active, showing various configuration options for the tender. The 'Number' is 41, 'Name' is 'POS House', and 'Type' is 'House account'. The 'Button position' is 'Row 2, Column 3'. The 'Default amount behavior' is 'Ask for amount'. The 'Active' checkbox is checked. The 'Tips' section shows 'Allow tips' checked, 'Maximum tip %' set to 999.00, and 'Tip refund %' set to 0.000000.

| Settings | |
|---------------------------------|-------------------------------------|
| Number | 41 |
| Name | POS House |
| Type | House account |
| First available button position | <input type="checkbox"/> |
| Button position | Row 2, Column 3 |
| Button image | None |
| Report as | Current |
| Default amount behavior | Ask for amount |
| Active | <input checked="" type="checkbox"/> |
| Track | <input checked="" type="checkbox"/> |
| Can refund | <input type="checkbox"/> |
| Affect deposit | <input type="checkbox"/> |
| Print check on close | <input type="checkbox"/> |
| Open drawer on close | <input type="checkbox"/> |
| Print signature line | <input type="checkbox"/> |
| Combine on check | <input type="checkbox"/> |
| Close check upon payment | <input type="checkbox"/> |
| Do not verify amount | <input type="checkbox"/> |

| Overpayment | |
|---------------------------------|--------------------------|
| Allow overpayment | <input type="checkbox"/> |
| Auto fix balance without prompt | <input type="checkbox"/> |
| Provide change | <input type="checkbox"/> |

| Tips | |
|----------------------------------|-------------------------------------|
| Allow tips | <input checked="" type="checkbox"/> |
| Maximum tip % | 999.00 |
| Tip refund % | 0.000000 |
| Remove tip line if auto gratuity | <input type="checkbox"/> |

Figure 1 - 39 Tenders (House Account)

3. Under the 'Settings' group bar, type a **name** to easily identify this as the house account tender.
4. Select **Active**.

5. Select **Track**.
6. Under the 'Tips' group bar, configure the **tip options**, as necessary.
7. Select the **Identification** tab.

The screenshot shows the 'Tenders' window with the 'Identification' tab selected. The 'Require identification' checkbox is checked. The 'Minimum' value is 1 and the 'Maximum' value is 8, both highlighted with a red oval. Other options like 'Numeric only', 'Print on check', and 'Validate' are unchecked. The 'Valid' section has 'Include' selected. The 'Prefix checking' section shows 'Prefix 1' through 'Prefix 4' and 'Digits to validate' set to 0.

Figure 1 - 40 Tenders - Identification Tab (House Account)

8. Select **Require identification**.
9. Set the **minimum** and **maximum** values to match your house account numbering system.
10. Click **Save** and exit the **Tenders** function or continue to the **next procedure**.



Tip

ATO passes the house account number associated with the customer through Aloha Connect to the POS.

To create a prepaid tender:

1. Select **Maintenance > Payments > Tenders > Tender** tab.

| Settings | |
|---------------------------------|-------------------------------------|
| Owner | 1 Corporate-TableService |
| Number | 42 |
| Name | Prepaid |
| Type | Generic |
| First available button position | <input checked="" type="checkbox"/> |
| Button image | None |
| Report as | Current |
| Default amount behavior | Ask for amount |
| Active | <input checked="" type="checkbox"/> |
| Track | <input checked="" type="checkbox"/> |
| Can refund | <input type="checkbox"/> |
| Affect deposit | <input type="checkbox"/> |
| Print check on close | <input type="checkbox"/> |
| Open drawer on close | <input type="checkbox"/> |
| Print signature line | <input type="checkbox"/> |
| Combine on check | <input type="checkbox"/> |
| Close check upon payment | <input type="checkbox"/> |
| Do not verify amount | <input type="checkbox"/> |
| Overpayment | |
| Allow overpayment | <input type="checkbox"/> |
| Auto fix balance without prompt | <input type="checkbox"/> |
| Provide change | <input type="checkbox"/> |
| Tips | |
| Allow tips | <input type="checkbox"/> |

Figure 1 - 41 Tender - Tender Tab (Prepaid Tender)

2. Click the **New** drop-down arrow, select **Generic** as the tender type, and click **OK**.
3. Under the 'Settings' group bar, type a **name** to easily identify this as the delivery prepaid tender.
4. Select **Active**.
5. Select **Track**.
6. Under the 'Overpayment' group bar, clear **Allow overpayment** and under the 'Tips' group bar, clear **Allows tips**. This is because the delivery company pays the exact amount on the checks.
7. Do not select **any options** on the Type tab, as the prepaid tender is a 'non-cash' generic tender.
8. Click **Save** and exit the **Tenders** function or continue to the **next procedure**.

To allow use of the prepaid tender for the delivery service:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.

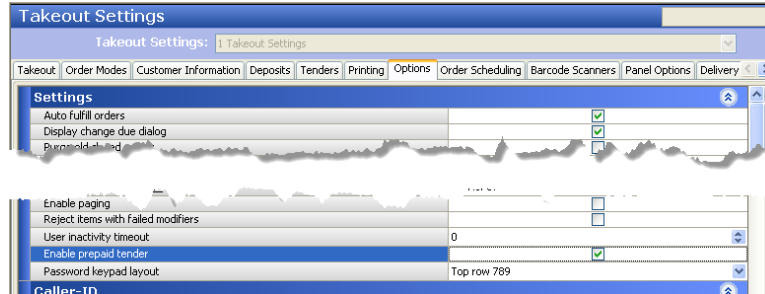


Figure 1 - 42 Takeout Settings - Options Tab (Prepaid tender)

2. Under the 'Settings' group bar, select **Enable prepaid tender**.
3. Click **Save**.

To create a deposit tender:

1. Select **Maintenance > Payments > Tenders > Tender** tab.

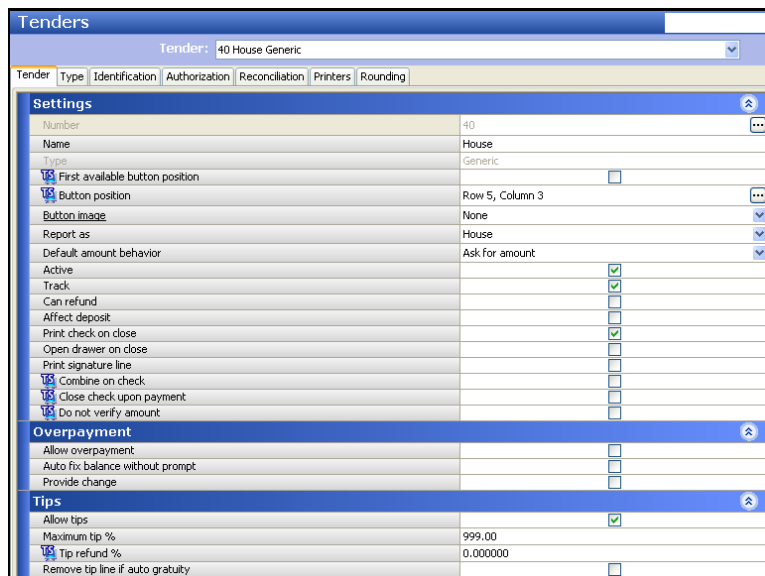


Figure 1 - 43 Tender -Tender Tab (Deposit Tender)

2. Click the **New** drop-down arrow, select **Generic** as the 'Tender type,' and click **OK**.
3. Under the 'Settings' group bar, type a **name**, such as Deposit, to easily identify the deposit tender.
4. Select **Active**.

5. Select **Track**.
6. Under the 'Overpayment' group bar, clear **Allow overpayment** and under the 'Tips' group bar, clear **Allows tips**, because the system applies the exact amount of each deposit using this tender.
7. Do not select **any options** on the Type tab, as the deposit tender is a 'non-cash' generic tender.
8. Click **Save** and exit the **Tenders** function or continue with the **next procedure**.

You must create items for the Deposit feature. Once you create all deposit components, align the deposit tender in Aloha Takeout Configuration. [See "Configuring printing with ATO" on page 2-11.](#)

To create tippable credit card tenders:



Tip

The Aloha ID of the 'Report As' (non-tip) tender must be lower than the related 'Allows Tips' tender for all credit cards for this to work.

1. Select **Maintenance > Payments > Tenders**.

| Tenders | |
|------------------------------------|----------------------------------|
| Tender: 111 Visa (Tip) Credit card | |
| Tender | Type |
| 111 | Visa (Tip) |
| 112 | Credit card |
| 113 | Row 10, Column 1 |
| 114 | None |
| 115 | Visa |
| 116 | Ask for amount |
| 117 | Active |
| 118 | Track |
| 119 | Can refund |
| 120 | Affect deposit |
| 121 | Print check on close |
| 122 | Open drawer on close |
| 123 | Print signature line |
| 124 | Combine on check |
| 125 | Close check upon payment |
| 126 | Do not verify amount |
| 127 | Allow overpayment |
| 128 | Auto fix balance without prompt |
| 129 | Provide change |
| 130 | Allow tips |
| 131 | Maximum tip % |
| 132 | Tip refund % |
| 133 | Remove tip line if auto gratuity |

Figure 1 - 44 Tenders - Tender Tab (Tippable Credit Card)

2. Select a **non-tippable credit card tender**.
3. Click **Copy**.
4. Type a **copy to number** or select a **number** from the drop-down list. We recommend adding 100 to the tender number from which you are making a copy and using the result as the new tippable tender, to make configuration and troubleshooting easier. The copied tender appears in Tender maintenance.

5. Under the 'Settings' group bar, edit the **name** to easily identify this as a credit card tender that allows tips.
6. Select the original credit card **tender** from the 'Report as' drop-down list. This allows the POS to consolidate the two credit card tenders (non-tipped and tipped) on the Payment report.
7. Select **Active**.
8. Select **Track**.
9. Under the 'Tips' group bar, select **Allow tips**.
10. Type the **maximum tip %**, or leave at **0.00** for no maximum.
11. Clear **Remove tip line if auto gratuity**.
12. Click **Save** and exit the **Tenders** function.

To align POS tenders for use with Aloha Takeout:

The Tenders tab in Takeout Settings allows you to specify the Aloha POS tenders that are available to Aloha Takeout. Aloha Takeout uses Aloha POS tenders to:

- Close checks within the Aloha Takeout user interface or through an interface terminal.
- Close checks to the tender associated with cash tender type in Takeout Settings, upon driver return.
- Determine which tenders you can apply to future order deposits.
- Define tippable credit card tenders for Quick Service operations.
- Apply payments to house account orders.

Adding POS tenders on this tab provides the linkage between Aloha Takeout and the POS reporting structure.



| Tender Type | Tender Id | Available for deposits | Description |
|---------------|------------|-------------------------------------|-------------|
| Amex | Amex (Tip) | <input checked="" type="checkbox"/> | |
| Cash | Cash | <input checked="" type="checkbox"/> | |
| Deposit | Deposit | <input type="checkbox"/> | Deposit |
| Discover | Dscv (Tip) | <input checked="" type="checkbox"/> | |
| House Account | POS House | <input type="checkbox"/> | |
| MasterCard | MC (Tip) | <input checked="" type="checkbox"/> | |
| Prepaid | Prepaid | <input type="checkbox"/> | |
| Visa | Visa (Tip) | <input checked="" type="checkbox"/> | |

Figure 1 - 45 Takeout Settings - Tenders Tab

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Tenders** tab.
2. Click the **Add** drop-down arrow, select an **Aloha Takeout tender type**, and click **OK**.
3. Select a **POS tender** created for use with Aloha Takeout from the 'Tender ID' drop-down list.
4. Select **Available for deposits**, if this button needs to appear on the Deposits screen.

5. Type the **text** to appear on the button in 'Description.'
6. Select **Deposit tender** to specify the generic tender created in the Tenders function in the Aloha POS system for Aloha Takeout to use when applying a deposit with rounding rules. If the deposit tender does not use rounding rules, select 'Default' from the drop-down list and Aloha Takeout uses the tender specified in 'Deposit tender' option in Takeout Settings > Deposits tab.
7. Repeat this **procedure** as many times as necessary to add all the tenders you need to support accepting deposits or closing checks while using Aloha Takeout.
8. Click **Save**.

Establishing navigation between the Aloha POS system and Aloha Takeout

How you configure the Aloha POS system and Aloha Takeout to switch between these two applications plays an important role in the success and efficiency of fast-paced takeout and delivery environments. Depending on the role of the employee, you can have Aloha Takeout or the POS screen appear upon login. Depending on which screen appears at login, buttons allow you to switch between the two applications. Ultimately, the goal is to guide the employee through the order flow with the least number of button touches.

- Bartenders and servers may enter takeout orders on a limited basis depending on the stores takeout business and the availability of dedicated takeout employees. Configure these job codes with the POS as the primary screen. Add buttons to an existing floor plan screen and order entry panel, to switch to takeout, when necessary.
- Phone order takers primarily address takeout orders. Configure the system to 'Show takeout on log in,' allowing them to immediately look up or add a customer on the phone and start an order. Select Lookup as the return screen to go back to Aloha Takeout, ready for the next phone call, after completing an order.
- You can also limit drivers and dispatchers from switching to the POS. Select 'Show Takeout on Login,' select an ATO return screen, and clear 'Display 'Aloha' button' to restrict access to the POS for these job codes.

The Aloha POS system and Aloha Takeout provide several ways of navigating to Aloha Takeout throughout the order process:

- **At log in** — Show Takeout on Login, floor plan, and QS order entry panel.
- **During an order** — TS order screen panel buttons and QS order entry panel buttons.
- **Finalizing an order** — Return screen.

Adding ATO buttons to Table Service

You must add buttons to the FOH in Table Service to provide access to Aloha Takeout screens. There are two common methods available to make this access easy.

- Add buttons to a floor plan.
- Add buttons to an Order Screen panel.

Adding buttons to a floor plan

We recommend using the Floor Plan feature for Table Service employees whose job codes also include Aloha Takeout functions. You can add buttons to an existing POS panel to switch to ATO. If

this is not possible, you can create a new panel and screen for this purpose. We recommend you add at least the following three buttons to a floor plan panel:

- **Look Up** — Transitions directly to the Look Up screen, in Aloha Takeout, making it possible to begin the order by associating it with a specific customer.
- **WWT** — Transitions directly to the working with tables screen, making it possible to begin the order entry process immediately.
- **Exit** — Logs out of the FOH.

To add an ATO navigation button to a floor plan panel:

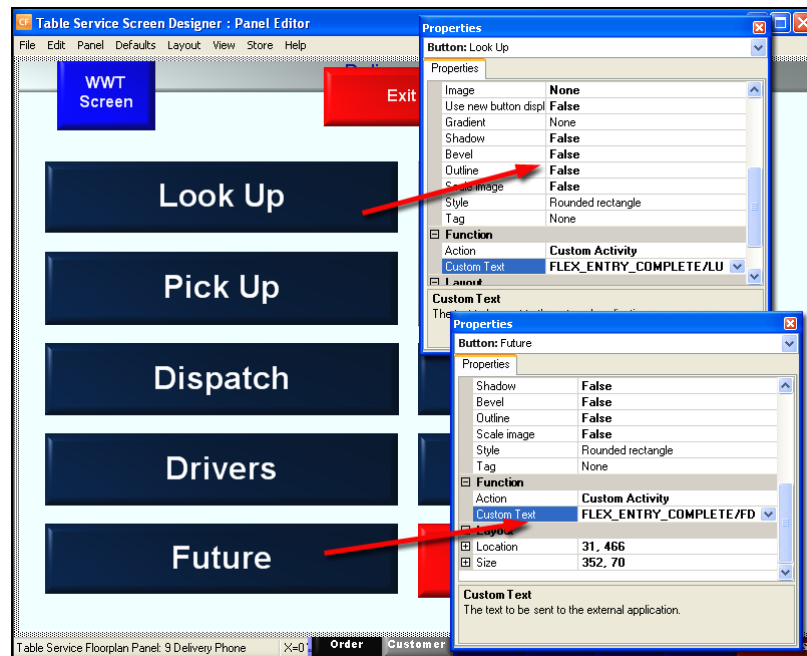


Figure 1 - 46 Table Service Screen Designer (Takeout Order Taker Floor Plan Example)

1. Select **Maintenance > Screen Designer > Table Service Screen Designer > Work with Panels**.
2. Select **Panel**.
3. Select **Open Panel** or **New Floorplan Panel**.
4. Clear **Fixed button layout**, if necessary.



Tip

You may need to clear 'Mark as template' to edit the 'Fixed button layout' option.

5. Right-click **within the panel** and select **New Button**. The 'Properties' dialog box appears.
6. Select **Custom Activity** from the 'Action' drop-down list. A 'Custom Text' option appears.

7. Type “**ORDER_ENTRY_COMPLETE/LU**” in ‘Custom Text.’ This creates a button for you to touch to go from the floor plan to the ATO Lookup screen.
8. Type a **name** for the button in ‘Text’ to easily identify the screen that appears when you touch this button.
9. Configure other **button properties**, as normal.
10. Add a **WWT** button to the panel, if the panel does not have one.
11. Add an **Exit** button to the panel, if the panel does not have one.
12. Repeat the **above steps** to create additional navigation buttons, as needed, using the following ‘Custom Text’ parameters For example, ‘ORDER_ENTRY_COMPLETE/LU.’

| Parameter | Screen Navigation |
|-----------|-------------------|
| LU | Look Up screen |
| PU | Pick Up screen |
| DP | Dispatch screen |
| DM | Driver screen |
| FD | Future screen |
| MP | Map screen |



Tip

Create multiple floor plan panels and navigation buttons to provide or restrict access to ATO screens for various job codes.

13. Add **WWT**, **table**, and other **floor plan buttons**, as needed.
14. Select **Panel > Save Panel**.
15. Select **File > Close Panel Editor** to exit the Panel Editor function.

To add a panel to a floor plan screen:

1. Select **Maintenance > Screen Designer > Table Service Screen Designer > Work with Screens**.
2. Click the **Screen** drop-down list and select an **existing screen**.
— OR —
Click **New** to create a new screen.
3. Under the panels frame, click **Add** and select the **panel**, created earlier in this procedure, from the Add Panels dialog.
4. Click **OK**.
5. Click **Save** and exit the **Screen Editor** function.

To add the ATO floor plan to a job code:

1. Select **Maintenance > Labor > Jobcodes > Order Entry** tab.
2. On the 'Order Entry' tab, under the 'Screens' group bar, select **Use floorplan**.
3. Select the floor plan **screen** you created for ATO employees from the drop-down list.
4. Click **Save**.
5. Repeat the **steps above** for each **ATO job code**.
6. Exit the **Jobcodes** function.

Adding buttons to a Table Service Order Screen panel

You must add buttons to an Order Screen panel to finalize Aloha Takeout orders while in the Table Service order entry screen. This requires you to:

- Create an Order Screen panel or edit an existing one.
- Add buttons to switch to Aloha Takeout.
- Configure an event to display the Order Screen panel for ATO job codes.



Figure 1 - 47 Table Service Order Screen Panel

To add ATO buttons to an Order Screen panel:

1. Select **Maintenance > Screen Designer > Table Service Screen Designer > Work with Panels**.
2. Select **Panel**.
3. Select **Open Panel** to open an existing Order Screen panel or select **New Order Entry Panel** to create a new Order Screen panel for ATO job codes.
4. Clear **Fixed button layout**, if necessary.



Tip

You may need to clear 'Mark as template' to edit the 'Fixed button layout' option.

5. Right-click **within the panel** and select **New Button**. A 'Properties' dialog box appears.

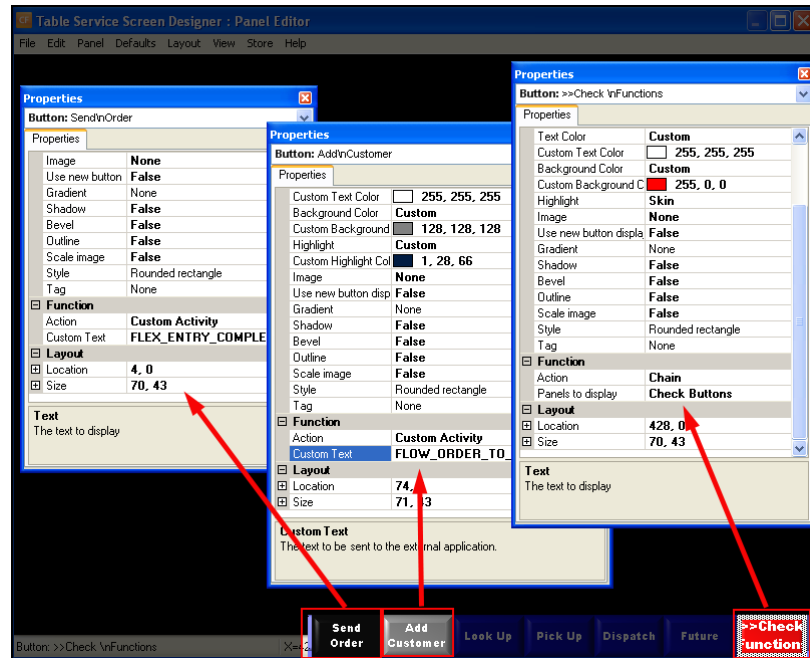


Figure 1 - 48 Order Screen Configuration for Table Service Screen Designer

6. Select **Custom Activity** from the 'Action' drop-down list.
7. Type "**FLEX_ENTRY_COMPLETE/LU**" in 'Custom Text.' This creates a button that navigates to the ATO Lookup screen.
8. Type a **name** for the button in 'Text' and configure other button properties as normal.



Note

If you use a custom Order Screen panel for check functions, you can add the new Aloha Takeout button, if there is room.

In most cases, you need to create a new Order Screen panel to provide access to ATO functions and add a 'chain' button function to each Order Screen panel to allow you to switch between the two custom panels, as needed.

9. Add **other buttons** to the Order Screen panel, as needed.
10. Select **Panel > Save Panel**.
11. Select **File > Close Panel Editor** to exit the Panel Editor function.

To create a daily activation schedule:

1. Select **Maintenance > System Settings > Activation Schedule**.
2. Confirm you have a '**Daily**' activation schedule with 'Start of day' selected. If not, create one.
3. Click **Save** and exit the **Activation Schedule** function.

To add the event for the ATO Order Screen panel to the daily activation schedule for ATO job codes:

1. Select **Maintenance > System Settings > Event Schedule**.
2. Click the **Add** drop-down arrow and select **Set Order Screen Panel by Jobcode** to create the order screen event.
3. Select the **name** of the 'Daily' activation schedule from the 'Activation Schedule' drop-down list.
4. Leave the **start time**, **start date**, and **end date** as the default values.
5. Under the 'Set Order Screen Panel by Jobcode' group bar, select a **job code** from the 'Jobcode' drop-down list.
6. Select the custom **Order Screen panel** you created for Aloha Takeout from the drop-down list.
7. Click **Save**.
8. Repeat **this procedure** for each job code that needs access to the ATO Order Screen panel.
9. Exit the **Event Schedule** function.

Adding ATO buttons in Quick Service

For Quick Service operations, you must add buttons to the Quick Service FOH to provide access to Aloha Takeout screens.

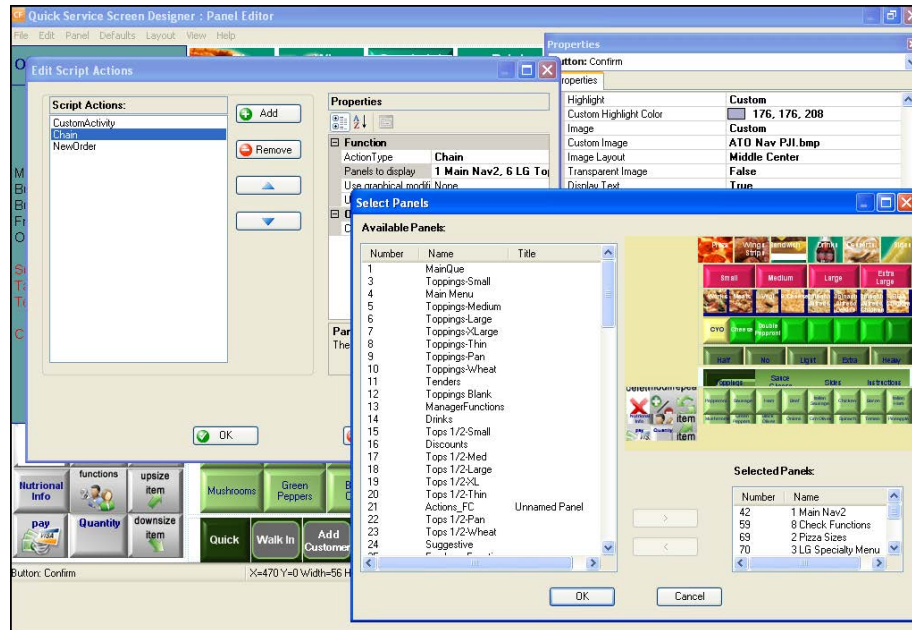


Figure 1 - 49 Quick Service Script Button Function Containing FLEX_ENTRY_COMPLETE

To add ATO buttons to a Quick Service panel:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels**.
2. Select **Panel**.
3. Select **Open Panel** or **New Order Panel**.
4. Clear **Fixed button layout**, if necessary.



Tip

You may need to clear 'Mark as template' to edit the 'Fixed button layout.'

5. Right-click **within the panel** and select **New Button**. The 'Properties' dialog box appears.
6. Select **Script** from the 'Action' drop-down list. The 'Script Actions' dialog box appears.
7. Within the 'Script Actions' option, click the **ellipses button (...)**. The 'Edit Script Actions' dialog box appears.
8. Click **Add**.
9. Select **Custom Activity** from the 'ActionType' drop-down list within the 'Properties' dialog box.

10. Type “**FLEX_ENTRY_COMPLETE/LU**” in ‘Custom Text.’

| Parameter | Screen Navigation |
|-----------|-------------------|
| LU | Look Up screen |
| PU | Pick Up screen |
| DP | Dispatch screen |
| DM | Driver screen |
| DP | Dispatch screen |
| DM | Driver screen |
| FD | Future screen |

11. Click **Add** again.

12. Select **Chain** from the ‘ActionType’ drop-down list within the ‘Properties’ dialog box.

13. Within the ‘Panels to display’ option, click the **ellipses button (...)**. A ‘Select Panels’ dialog box appears.

14. Hold **Ctrl** and left-click each **panel** in ‘Available Panel.’

15. Click the **arrow** to move these **panels** to ‘SelectedPanels.’ These panels appear the next time the POS appears as the active window on a terminal.

16. Click **OK**.

17. Click **Add** again.

18. Select **New Order** from the ‘ActionType’ drop-down list within the ‘Properties’ dialog box.

19. Select **True** from the ‘Suppress Prompt’ drop-down list.

20. Click **OK** to close the Edit Script Actions dialog box.

21. Type a **name** for the button in ‘Text’ and configure other **button properties**, as normal.

22. Repeat **this procedure** to add additional buttons to the panel.

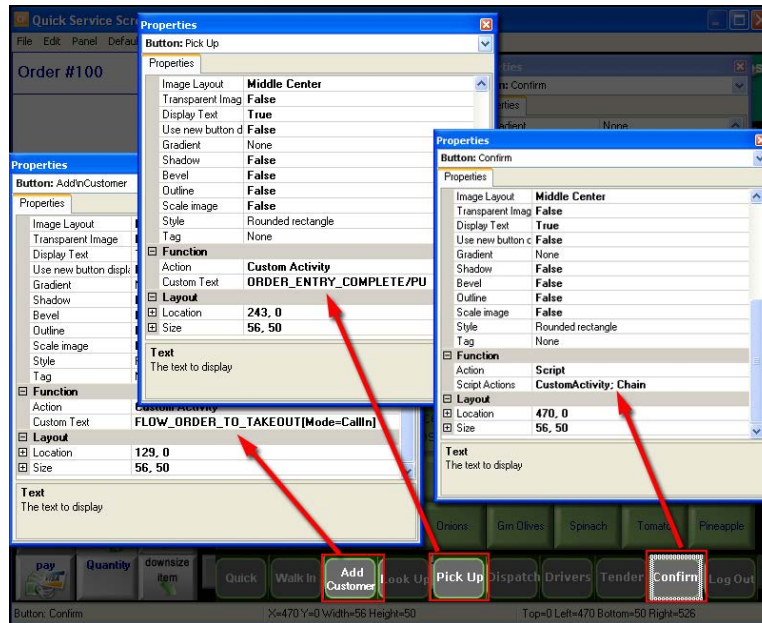


Figure 1 - 50 Quick Service Screen Designer



Tip

If necessary, create multiple buttons with the same function but different button text, to help guide new users through the order flow.

23. Select **Panel > Save Panel**.

24. Select **File > Close Panel Editor** to exit the Panel Editor function.

You may need to create a screen specifically for Aloha Takeout job codes.

To add a screen for Aloha Takeout job codes:

1. Select **Work with Screens**.
2. Click the **Screen** drop-down list and select an existing **screen**.
— OR —
Click **New** to create a new screen.
3. Click **Add** and select the **panel**, created earlier in this procedure, from the 'Add Panels' dialog box.
4. Click **OK**.
5. Click **Save** and exit the **Screen Editor** function.

To associate the custom Aloha Takeout screen with ATO job codes:

1. Select **Maintenance > Labor > Jobcodes > Order Entry** tab.
2. Select the **screen** you created for Aloha Takeout job codes from the 'Order entry screen' drop-down list.
3. Click **Save**.
4. Repeat **this procedure** for each Aloha Takeout **jobcode**.
5. Exit the **Jobcodes** function.

Refreshing 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 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.

Chapter 2: Customizing Aloha Takeout

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About this chapter

In Chapter 1, “Getting started with Aloha Takeout,” many of the requirements for the POS also called you to perform a task in Aloha Takeout. For example, you had to create an order queue in the Aloha POS system for use with Aloha Takeout and then access Aloha Takeout and tell it the name of the queue you created. This section covers the remaining integration tasks you perform in Maintenance > Takeout Configuration > Takeout Settings for which there are not corresponding tasks in the Aloha POS system.

Configuring options that affect how Aloha Takeout functions

You must make several decisions about how you want your takeout or delivery business to work, and make configuration changes to support them, to round out the configuration for your sites. Options that support these decisions are available on the Options tab.

| Settings | |
|--|-------------------------------------|
| Auto fulfill orders | <input checked="" type="checkbox"/> |
| Display change due dialog | <input checked="" type="checkbox"/> |
| Purge old closed orders | <input checked="" type="checkbox"/> |
| Enable curbside | <input checked="" type="checkbox"/> |
| Enable mapping | <input checked="" type="checkbox"/> |
| Enable credit card storage | <input checked="" type="checkbox"/> |
| Auto rotate site key | <input type="checkbox"/> |
| Site key expiration days | 90 |
| Site key warning days | 7 |
| Automatically purge credit card data | <input checked="" type="checkbox"/> |
| Automatic credit card data purge days | 1825 |
| Accept gift cards | <input type="checkbox"/> |
| Prompt for alternate payment info on payment failure | <input checked="" type="checkbox"/> |
| Auto apply all order payments | <input type="checkbox"/> |
| Apply payment on order confirmation | <input checked="" type="checkbox"/> |
| Close checks on apply payment | <input checked="" type="checkbox"/> |
| Recalculate quote time when order modified | <input type="checkbox"/> |
| Display takeout order sequence number | <input checked="" type="checkbox"/> |
| Enable takeout order timing | <input type="checkbox"/> |
| Order cancel void reason | Future |
| Enable paging | <input type="checkbox"/> |
| Reject items with failed modifiers | <input checked="" type="checkbox"/> |
| User inactivity timeout | 60 |
| Password keypad layout | Top row 123 |
| Enable write to GCHKINFO DBF | <input checked="" type="checkbox"/> |
| Caller-ID | |
| Device name | None |
| Port number | 0 |
| Line count | 0 |

Figure 2 - 1 Options tab - Settings group bar

To configure options that affect how your Takeout system functions:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the 'Settings' group bar, select **Auto fulfill orders** to have the Takeout system change a walk-in or pick-up order status to closed, when you close an order in the POS. Aloha Takeout allows orders to be closed in the Aloha POS system, yet appear open on ATO screens. This allows you to tender and close an order in the POS, then mark the order as complete in Aloha

Takeout once it is fulfilled and handed to the customer. If cleared, you must touch 'Picked Up' to manually close orders within Aloha Takeout.



Tip

Even if you select 'Auto fulfill orders,' 'Picked Up' still appears on the Pick Up screen in certain circumstances. Checks for which you apply a payment on the Order Confirmation screen are tendered but remain open in Aloha Takeout until the customer arrives to pick up the order. At this point, it is necessary the employee touches 'Picked Up' to close the order and move it to the Closed Orders list. Unless your operation warrants an extra step to finalize the closed order, we recommend selecting 'Auto fulfill orders.'

3. Select **Display change due dialog** to cause a 'Change Due' message to appear in Aloha Takeout, when transitioning from the Aloha POS system back to Aloha Takeout after tendering and closing a check.
4. Clear **Purge old closed orders**. This option is obsolete as Aloha Takeout is capable of displaying the full days closed orders without impacting performance.
5. Select **Enable curbside** to enable a drive-up environment where the orders are brought to the customer in their car. A prompt for vehicle information appears when starting a curbside order, and vehicle information is then stored with the customer profile. This information appears on the Pick Up screen, to help curbside attendants match orders to cars as they pull in. Currently, you can store vehicle information for only one car for each ATO customer.
6. Select **Enable mapping**, if you are licensed for Aloha Delivery Mapping and you have installed the mapping application.



Reference

Refer to the [Delivery Area Feature Focus Guide - HKS351](#) for more information on mapping.

7. Select **Enable credit card storage**, if you want to allow Aloha Takeout to store customer credit card information along with customer records. The program stores this information in an encrypted form, allowing only the last four digits of the card number to appear unmasked. It is necessary to set the site key in the Takeout Data Protection Tool for this feature to work.
8. Select **Prompt for alternate payment info on payment failure** to cause a dialog message to appear when the system declines a tender entered on the Order Confirmation screen or after touching 'Apply Payment.' You can request updated payment information from the customer or store the order until you enter valid payment information. The system does not order the items until you enter valid payment information or remove the payment.
9. Select **Automatically purge credit card data** to automatically remove all saved cardholder data from the Aloha Takeout database after the specified number of days. This allows you to set up periodic purge dates.

10. Type the number of **days to wait after the last purge date** before purging saved cardholder data. The number is based on the date of the last purge as opposed to the date the cardholder last used the card. The default value is 1825 days (five years).
11. Select **Apply payment on order confirmation** to cause Aloha Takeout to retrieve stored payment card information and request authorization when an employee touches OK on the Order Confirmation screen.
12. Select **Close checks on apply payment**, if you are only using Aloha Takeout for online orders and want to automatically apply the online payment and close the check when releasing the order.
13. Select **Automatically print driver itinerary** on driver dispatch to print the driver itinerary automatically when you dispatch a driver.
14. Clear **Recalculate quote time when order modified** to retain the original quote time when you recall an order and add or remove items.
15. Select **Display takeout order sequence number** to print a simple incrementing number within the Aloha Takeout header section of kitchen chits and guest checks. Use the sequence number to prepare, assemble, and track orders through the takeout and delivery process.
16. Clear **Enable paging** to disable the paging feature.
17. Select **Reject items with failed modifiers** to prevent releasing the parent item when a modifier is designated as “unavailable” in Item Availability. This feature affects future and online orders when releasing items to the POS. For example, if you modify fajitas with chicken, yet chicken is unavailable, the system will not release the fajitas item and follow the Aloha Takeout ‘unavailable item’ functionality, when enabled. Enable this option depending on the impact of modifiers on the parent item and the ability of the kitchen to prepare any item if a modifier is missing. In most cases we recommend enabling this option.
18. Type **60** as the ‘User inactivity timeout’ to automatically log out an Aloha Takeout terminal when not in use. This is required because the POS FOH timeout is suspended when Aloha Takeout is the active ‘window’ on the terminal. This option maintains FOH security, if you forget to log out.
19. Select **Top Row 123** from the ‘Password keypad layout’ drop-down list for a consistent ATO and POS manager approval keypad.
20. Select **Enable write to GCHKINFO DBF** to enable the system to not write ATO order information, such as zip code, to GChkInfor.dbf, and conserve disk space and speed up the import time to Aloha Insight. We recommend you not clear this option unless instructed by an Aloha Takeout representative.
21. Click **Save**.

Configuring late order alerts

Order Timing alerts you when orders are nearing, at, or past the promise time quoted to the customer. Orders turn yellow within the warning period. Orders turn red when the order is at or past its promise time. This allows you to prioritize these orders and meet service level standards.

To establish order timing alerts:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the 'Settings' group bar, select **Enable takeout order timing** to change the color of orders on Aloha Takeout screens based on promise time status. When selected, other order timing configuration options appear.
3. Clear **Include call-in orders in Takeout timing** to have the system ignore call-in orders as part of the order timing alerts. In most cases, you cannot control when a customer arrives to pick up an order.
4. Type or use the arrows to select **120** in 'Warning time (in seconds)' to change the color of an order from white to yellow on Aloha Takeout screens two minutes before the promise time. This color change indicates the order is not yet late, but requires attention soon. Adjust the value, as necessary.
5. Type or use the arrows to select **600** in 'Delivery buffer (in seconds)' to account for an average time to drive an order from the store to a customer. This extends the warning (yellow) and late (red) thresholds ahead of the promise time. Adjust the value, as necessary.
6. Click **Save**.

Configuring when Aloha Takeout runs ATO end-of-day

You usually configure the system to run Aloha Takeout EOD separately from the Aloha POS EOD. Typically, you schedule the ATO EOD to occur prior to a POS EOD since the ATO order records are linked to orders within the POS Trans.log. Use the following options to configure when an ATO EOD runs.

The screenshot shows the 'Takeout Settings' window with the 'Options' tab selected. Under the 'End Of Day' group bar, the 'Enable scheduled EOD' checkbox is checked. The 'Poll time (seconds)' is set to 30, 'Scheduled time' is 11:00:00 PM, and 'Historical data retention days' is 400. Below this, the 'Invoicing' group bar shows 'First page item count' and 'Middle page item count' both set to 0.

| End Of Day | |
|--------------------------------|-------------------------------------|
| Enable scheduled EOD | <input checked="" type="checkbox"/> |
| Poll time (seconds) | 30 |
| Scheduled time | 11:00:00 PM |
| Historical data retention days | 400 |

| Invoicing | |
|------------------------|---|
| First page item count | 0 |
| Middle page item count | 0 |

Figure 2 - 2 Options tab - End Of Day group bar

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the 'End of Day' group bar, select **Enable scheduled EOD**. When selected, other end-of-day configuration options appear.
3. Confirm **Poll time (seconds)** is set to 30 or more.
4. Use the **arrows** or type a **time** directly in 'Scheduled time,' to establish the time for the EOD event to occur.



Tip

The EOD event established in Aloha Takeout is separate from the EOD event in the Aloha POS system. As a 'best practice,' we recommend configuring the ATO EOD event to run five minutes or more prior to running the Aloha POS EOD.

ATO uses a 24-hour clock, not the 48-hour clock used by the POS. For example, set the 'Scheduled time' to 3:00 for 3:00 AM, not 27:00, as you would in the POS.

5. Leave **Historical data retention days** at the 400 day default or type a **number of days** that better suits your drive space and operational needs.
6. Click **Save**.

Establishing requirements for capturing customer information

Collecting guest information is a critical part of building your client database so that you can market to your customers. You can establish default entries that appear in a new customer record the moment you begin creating it, with the ability to change the values, as well as require certain fields your employees must enter for the record. We recommend consulting with your marketing, operations, and training departments to find the right balance between order flow efficiency and customer data retention.

| Takeout Settings | |
|---|-------------------------------------|
| Takeout Settings: 1 Takeout Settings Coffee Bean Primary | |
| Takeout Order Modes Customer Information Deposits Tenders Printing Options Check In Summary Order Scheduling Barcode Scanners Panel Options < > | |
| Customer information | |
| Populate new customer first name | <input checked="" type="checkbox"/> |
| Display last name first | <input type="checkbox"/> |
| Check for duplicates | <input checked="" type="checkbox"/> |
| Require customer for walk-in | <input type="checkbox"/> |
| Enable express customer entry | <input type="checkbox"/> |
| Require customer first name | <input type="checkbox"/> |
| Require customer last name | <input checked="" type="checkbox"/> |
| Require customer address | <input type="checkbox"/> |
| Require state for address | <input type="checkbox"/> |
| Require zip code for address | <input type="checkbox"/> |
| Require company name for office address | <input type="checkbox"/> |
| Mask loyalty ID | <input type="checkbox"/> |
| Enable customer fiscal ID | <input type="checkbox"/> |
| Mask tax ID | <input type="checkbox"/> |
| Require e-mail for new guests | <input type="checkbox"/> |
| Prompt for customer address when customer has multiple addresses | <input checked="" type="checkbox"/> |
| Default address type | Home |
| Default city | Denver |
| Default state | CO |
| Default zip code | 80214 |
| Prompt for new guest creation on name change | <input type="checkbox"/> |
| House Accounts | |
| Enable house accounts | <input type="checkbox"/> |
| Customer Purge | |
| Enable purge of inactive customers | <input type="checkbox"/> |

Figure 2 - 3 Takeout Settings > Customer Information tab

To configure customer name and profile parameters:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Customer Information** tab.
2. Under the 'Customer information' group bar, select **Populate new customer first name** to assume the first string entered in the search bar is the first name of the customer, for new customer record creation. Text after a space is interpreted as the last name.

3. Clear **Display last name first** unless this is the way your operation addresses customers. If you select this option, the customer name appears on search results, order lists, guest checks, and kitchen chits in 'last name, first name' format.
4. Select **Check for duplicates** to query first name and last name against existing customers in the database for potential duplicate records, when touching Add Guest. If a duplicate exists, a dialog box appears informing you the customer may already exist, and asking if you want to create a new customer record anyway.
5. Clear **Require customer for walk-in** to use an entered search string as a tab name. This does not associate a customer record with a walk-in order (even if a guest record is selected). Selecting this option requires you to search for a walk-in customer in the ATO database, which is often unnecessary and can cause guest issues and service delays in the counter ordering process. Unless you require marketing information for walk-in customers, we recommend clearing this option.
6. Select **Enable express customer entry** to display a condensed version of the Add Guest dialog. The express customer entry dialog displays one address, one phone number, and limited other fields required to create a customer record and start an order. You can add additional customer information at a later time by touching **Edit Guest** on any ATO screen.
7. Select **Require customer first name** to require the entry of a first name for each customer record.
8. Select **Require customer last name** to require the entry of a last name for each customer record. This helps maintain a viable marketing database.
9. Select **Require customer address** to require the entry of the address for each customer record.
10. Select **Require state for address** to require the entry of the state in which the customer resides for each customer record.
11. Select **Require zip code for address** to require the entry of the zip code in which the customer resides for each customer record.
12. Select **Require company name for office address** to require the entry of the company name for which the customer works for each customer record.
13. Enable the **Require Aloha Loyalty member ID for new guests** to prompt for the customer loyalty ID when adding a new customer to the database. To allow employees to bypass or override this requirement, enable the Can override 'Require Loyalty Member ID for new guests' access level found in Maintenance > Labor > POS Access Levels. Aloha Takeout automatically performs an Aloha Loyalty assignment for customers associated with an Aloha Loyalty ID.
Recommended Configuration: Selected for Aloha Loyalty sites.
14. Select **Mask loyalty ID** to replace the loyalty identification number in the FOH with asterisks to protect the data and prevent fraud.
15. Select **Mask fiscal ID** to replace the fiscal identification number in the FOH with asterisks to protect the data and prevent fraud.
16. Select **Mask tax ID** to replace the identification number in the FOH with asterisks to protect the data and prevent fraud.

17. Select **Enable customer fiscal ID** to allow you to enter a fiscal ID for an Aloha Takeout guest. An Add Fiscal ID button appears on the Customer Information tab of the Guest Record screen.
18. Select **Mask fiscal ID** to replace the numbers of the fiscal ID with asterisks.
19. Type the **minimum** and **maximum number of digits** allowed for an Aloha Loyalty member ID.
20. Enable the **Require e-mail for new guests** to prompt for the customer's e-mail address when adding a new customer to the database. **Note:** To allow employees to bypass or override this requirement, enable the Can override 'Require e-mail for new guests' access level found in Maintenance > Labor > POS Access Levels.
21. Enable **Prompt for customer address when customer has multiple addresses** for the select address dialog to appear when starting a new order for a customer that has both a home and an office address. When cleared, ATO uses the **Default address type** to associate the address with the order. You can touch **Select Contact** on the Pick Up or Dispatch screen to change to a secondary address or enter a one-time address.
22. Select from **Home** or **Business** as the default address type each time you create a new guest record.
23. Type a **Default city**, **Default state**, and **Default zip code** if all the addresses you service are within a single city, state, and zip code. Clear these options if you require employees to enter this information for each customer.
24. Select **Prompt for a new guest creation on name change** to display a prompt when you attempt to change the name of a guest from the FOH, providing a choice between changing the name of the guest or creating a new guest record on the original guest record.
25. Select **No alert**, **Display notification on all terminals**, or **Display notification on release terminal** from the 'Check in alert behavior' drop-down list to determine how the system displays a check-in message on an Aloha Takeout or POS terminal to notify an employee when a check-in action occurs, usually through an API call from a mobile application.
26. Click **Save**.

Configuring printing with ATO

Aloha Takeout follows POS terminal and printer group routing. Use the Maintenance > Hardware > Terminals > Default Printer and Voucher Printer options to define where interface terminals print these artifacts. Aloha Takeout uses printer intercept functionality to add a 'header' to guest checks and kitchen chits, containing customer and order information. Depending on the order mode and options selected on the Printing tab, varying information prints.

Select the default values to use for guest checks, driver itineraries, and kitchen chits. Examples of kitchen chits for walk-in and call-in orders, showing the type of information contained in each, appear below:

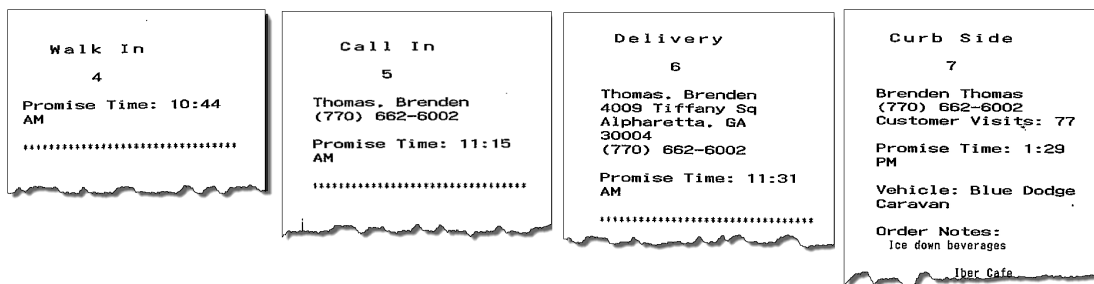


Figure 2 - 4 Examples, ATO headers for kitchen chits

Aloha headers contain the following information by order type:

- **Walk In orders:** Sequence number, if enabled.
- **Call In orders:** Customer name and contact phone number.
- **Delivery orders:** Customer name, contact phone number, and contact address.
- **Curbside orders:** Customer name, contact phone number, vehicle information.

Aloha Takeout also prints certain artifacts outside of the POS. These include:

- **Driver Itinerary:** Contains customer, order, payment, and route information for drivers. You can also configure the driver itinerary to print grocery items.
- **Bag Chit:** Contains future order customer and order summary information. The customer or the store can use this as a record. Bag chits do not contain pricing information.
- **Future Order Statement:** Contains future order customer and order summary information, including item prices. You can also print the future order statement for current orders.



Caution

Use caution with future order statements. Since they include prices, future order statements can be presented as guest checks for payments and are a possible theft opportunity.

Options available on the Printer tab in Takeout Settings control the printing of certain information for the benefit of drivers, other store employees, and the customer. Use these options to enhance communication among employees within the store and between the store and customers.

There are three note types used within Aloha Takeout you can control with various print options. As a general rule, train employees to enter helpful operational information, and not information that would offend a customer. The purpose of printing options is to separate store-facing operational information from customer-facing.

- **Guest notes** are stored in the guest profile, and should contain store-facing information to help service customer needs. Examples include allergy information or customer-specific requests for every order. Guest notes do not print on the guest check by design and there is no option to change this behavior.
- **Order notes** are stored on an order-by-order basis. They exist for the life of the order and are then purged. Order notes are requests outside of the normal item and modifier entry. "Use blue table cloths," "Ice down drinks," and "Package in separate bags" are examples of instructions specific to the order. Order notes print on kitchen chits by default. You can choose to print order notes on guest checks and driver itineraries.
- **Address notes** help delivery personnel get the order to the desired location. Cross streets, "yellow house," "red 2-story brick," and gate codes are examples of address notes that help the driver find the delivery location. Address notes print on labels and the driver itinerary by default. You can choose to print address notes on guest checks and kitchen chits.

To configure printing options:



Caution

Use caution when enabling any notes printing. There is always the possibility a guest will receive a printed artifact with guest, order, or address notes. Train your staff not to enter derogatory information in any notes field.

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Printing** tab.

Figure 2 - 5 Takeout Settings > Printing tab

2. Under the 'Printing' group bar, select **Print order notes on guest checks**, if you use the guest check when assembling the order or would like to keep guests informed of the order notes added to an order.
3. Select **Print order notes on driver itinerary**, if drivers use the itinerary to confirm order information. Clear this option to save paper and shorten the driver itinerary.
4. Select **Print promise time on guest check**, to print the promise time associated with an order in the ATO header section of the guest check.
5. Select **Print address on guest check**, to print the address of the guest on the guest check.
6. Select **Print guest name on guest check**, to print the name of the guest on the guest check.

7. Select **Print phone number on guest check**, to print the phone number of the guest on the guest check.
8. Select **Print address notes on guest check**, if drivers use a guest check as reference when delivering orders. Clear this option if drivers use the driver itinerary or other artifact with address note information.
9. Select **Print address on kitchen chit**, if drivers use a kitchen chit as reference when delivering orders. Clear this option, if drivers use the driver itinerary or other artifact with address note information.
10. Select **Print zone on kitchen chit** to include the delivery zone on the kitchen chit. For a catering order, the zone prints only if you assign catering orders to drivers.
11. Select **Print zone on Aloha receipt** to include the delivery zone on the receipt generated from the Aloha POS system. For a catering order, the zone prints only if you assign catering orders to drivers.
12. Select **Print zone on bag chit** to include the delivery zone on the bag chit.
13. Select **Print zone on future order statement** to include the delivery zone on the future order statement.
14. Select **Print zone on order manifest** to include the delivery zone on the order manifest.
15. Select **Print zone on item manifest** to include the delivery zone on the item manifest.
16. Select **Print zone on driver itinerary** to include the delivery zone on the driver itinerary.
17. Select **Print phone number on kitchen chit** to print the phone number on the kitchen chit when you create a takeout order, except when the order mode is 'Walk In.'
18. Select **Print order history count on itinerary and receipt** to print the number of orders on record for a customer on the guest check and driver itinerary. This printed value helps customers to know how close they are to winning loyalty prizes, such as drinks or tee-shirts, by looking at their receipts. It also helps drivers to remember to include awards, as they assemble delivery orders.
19. Select **zero** from the 'Print Order Items Receipt Count' drop-down list to specify no guest checks print when you finalize and send orders to the kitchen.
20. Select **zero** from the 'Apply Payment Receipt Count' drop-down list to not print a guest check when you apply a payment to a check through Aloha Takeout.
21. Type the **text** to proceed the promise time in the ATO header on guest checks, kitchen chits, and other ATO controlled print jobs in the 'Promise Time Label.' Do not include a colon in the character string as ATO automatically adds a colon. Limit the number of characters to 12, if possible, to avoid line wrapping.
22. Type the **text** to proceed the promise date in the ATO header on guest checks, kitchen chits, and other ATO controlled print jobs in the 'Promise Date Label.' Do not included the colon in the character string. ATO automatically adds the colon. Limit the number of characters to 12, if possible, to avoid line wrapping.

23. Type the **text** to print as the 'Add-on Chit Header Label' in the ATO header on kitchen chits. This feature is effective when a customer calls back and adds items to an existing ATO order. The default text is "Add On."
24. Select **where** on the chit you would like the header to print from the 'Chit header printing' drop-down list. This allows you to print the header at the top, bottom, or top and bottom of a chit. This makes it more visible in certain configurations and usages, such as when stapling a chit to the top of a paper bag or hanging on the kitchen wheel.
25. Select **where** on the guest check you would like the header to print from the 'Receipt header printing' drop-down list. This allows you to print the header at the top, bottom, or top and bottom of a guest check. This makes it more visible in certain configurations and usages, such as when stapling a guest check to the top of a paper bag.
26. Select **Print guest notes on kitchen chit** if the kitchen should be aware of guest notes on an ATO order. This makes guest note information available during food preparation.
27. Select **Print chit on final bump** to print a 'bag chit' when you bump the last item on an order from Aloha Kitchen or Aloha KPS. You can use the bag chit for final assembly of an order and staple it to the bag. You must install Aloha Kitchen or Aloha KPS for this feature to work.
28. Select **Print change chit when order cancelled or mode changed** to alert the kitchen staff when an order taker adjusts an existing order. ATO prints an updated chit to the kitchen allowing the kitchen staff to address the changes.
29. Select **Enable future order statement** to add the Print Statement button on the Order Details screen. The future order statement prints a summary of the order, including prices.
30. Click **Save**.

Label printing

Aloha Takeout has the ability to print item labels to attach to takeout packaging. Aloha Takeout labels include customer, item, order, total, and payment information. Labels make it easy to identify the packaging contents without opening the box and letting heat in or out. Labels also help drivers pull the correct items from a delivery bag to give a customer their entire order. You can define labels to print by category and by order mode.



Reference

Refer to the [Label Printing Feature Focus Guide - HKS369](#) for more information.

Check in printing

You can configure the system to allow you to send a chit where you designate when a customer checks in to pick up an order.

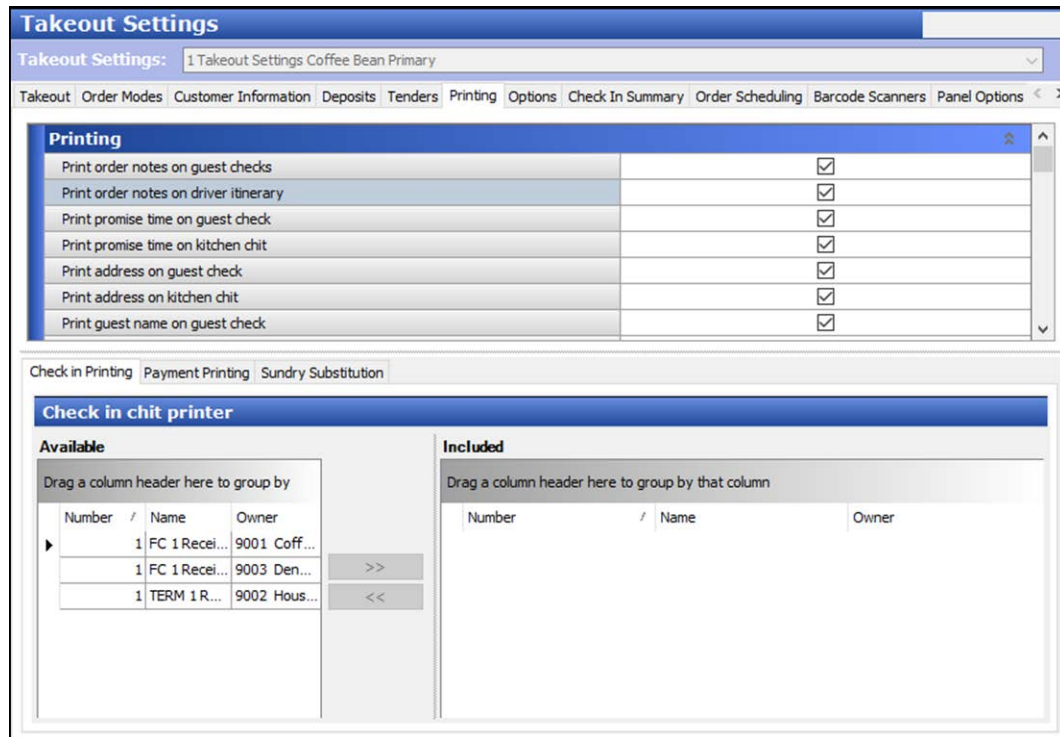


Figure 2 - 6 Takeout Settings > Printing tab > Check in Printing tab

1. In Takeout Settings > Printing tab > Check in Printing tab, under the 'Check in chit printer' group bar, select the **desired printer** from the Available list box and use the right arrows to move it to the Included list box. Conversely, to remove a printer, select the printer in the Included list box and use the left arrows to move it to the Available list box.
2. Click **Save**.

Declined payment printing

When a payment card is declined, the kitchen is often unaware of the failed payment and continues to make the order. If the restaurant does not call the customer back at the appropriate time for a new payment, they most likely have to waste the prepared food and take the financial loss.

You can configure the system to print a declined payment card chit to a defined printer. This notifies the restaurant that there is a failed payment and they can take action by contacting the guest for another form of payment or stop the kitchen from making the order; thereby, reducing food waste in the kitchen. For the failed payment, you can recall the order in Aloha Takeout and add a different

tender, if necessary. The Declined Payment Card chit includes the sequence number, order number from the Aloha POS system, and any captured customer information.

The screenshot displays the 'Takeout Settings' window for '1 Takeout Settings Coffee Bean Primary'. The 'Printing' tab is selected, and the 'Payment Printing' sub-tab is active. Below the sub-tab, the 'Failed payment chit printer' section is visible. It contains two lists: 'Available' and 'Included'. The 'Available' list has three items: '1 FC 1 Recei...', '1 FC 1 Recei...', and '1 TERM 1 R...'. The 'Included' list is currently empty. Navigation buttons '>>' and '<<' are located between the two lists. Above the lists, there are instructions to 'Drag a column header here to group by'.

| Number | Name | Owner |
|--------|---------------|--------------|
| 1 | FC 1 Recei... | 9001 Coff... |
| 1 | FC 1 Recei... | 9003 Den... |
| 1 | TERM 1 R... | 9002 Hous... |

Figure 2 - 7 Takeout Settings > Printing tab > Payment Printing tab

To configure the printer at which to print a declined payment card chit:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Printing** tab.
2. Select the **Payment Printing** tab.
3. Select the **printer** from the 'Available' list and click **>>** to move the printer to the 'Included' list.
4. Click **Save** and exit the **Takeout Settings** function.

Sundry substitution

In addition to including sundry items on bag manifests for your delivery and takeout business, Aloha Takeout also enables you to automatically substitute one sundry item for another when you need a large quantity of a sundry item for an order.

SCENARIO: When an order calls for 50 bowls of soup, instead of manually counting out 50 spoons, you can substitute one box of spoons for 50 individual spoons.



Reference

Refer to the [Bag Manifests Feature Focus Guide - HKS338](#) for more information.

Configuring caller ID

Aloha Takeout (ATO) has the ability to synchronize with caller ID (caller identification, CID) devices. One button for each line appears on the Look Up screen. Phone number, other information, and line status appear on the caller ID buttons, as each line rings. The Aloha Takeout Caller ID feature speeds up the process of searching for customers and entering phone numbers for new customers.



Reference

Refer to the [Caller ID Feature Focus Guide - HKS342](#) for more information.

Configuring Aloha Takeout for Delivery

Options under the 'Delivery' group bar allow you to configure driver and dispatch settings to meet your operational needs.

| Takeout Settings | | |
|---|------|-------------------------------------|
| Takeout Settings: 1 Takeout Settings Coffee Bean Primary | | |
| Takeout Order Modes Customer Information Deposits Tenders Printing Options Check In Summary Order Scheduling Barcode Scanners Panel Options | | |
| Settings Future Orders Check In | | |
| Delivery | | |
| Enable delivery | | <input checked="" type="checkbox"/> |
| Open drivers on clock in | | <input checked="" type="checkbox"/> |
| Assign drivers to curbside orders | | <input checked="" type="checkbox"/> |
| Assign drivers to catering orders | | <input type="checkbox"/> |
| Close checks on driver return | | <input checked="" type="checkbox"/> |
| Restrict dispatch to longest in driver | | <input checked="" type="checkbox"/> |
| No order assignment until after bump | | <input checked="" type="checkbox"/> |
| Seconds to wait after bump | 30 | <input type="text"/> |
| Print receipts with itinerary | | <input checked="" type="checkbox"/> |
| Print state and zip on itinerary | | <input type="checkbox"/> |
| Must authorize cash to store/driver | | <input checked="" type="checkbox"/> |
| Prompt for driver password | | <input type="checkbox"/> |
| Assign orders to dispatched drivers | | <input checked="" type="checkbox"/> |
| Set maximum driver carrying cash | | <input checked="" type="checkbox"/> |
| Maximum driver carrying cash | 0.00 | <input type="text"/> |
| Maximum number of orders per run | 2 | <input type="text"/> |
| Minimum minutes before dispatched driver can be returned | 1 | <input type="text"/> |
| Prompt for driver tips on return | | <input type="checkbox"/> |
| Print address information on driver checkout | | <input checked="" type="checkbox"/> |
| Print receipts on driver dispatch | | <input type="checkbox"/> |
| Automatically print driver itinerary on driver dispatch | | <input type="checkbox"/> |

Figure 2 - 8 Takeout Settings > Options tab > Settings tab > Delivery group bar

1. In Takeout Settings > Options tab > Settings tab under the 'Delivery' group bar, select **Enable delivery**. When selected, other delivery configuration options appear.
2. Select **delivery options**, as required.
 - Select **Open drivers on clock in** to cause drivers to automatically appear on the Dispatch screen as they clock in.

- Clear **Assign drivers to curbside orders** unless you have a 'car-hop' environment. When cleared, orders booked with the Curbside order type to appear on the Pick Up screen and prevent driver assignment.
- Clear **Assign drivers to catering orders** unless catering attendants are accountable for orders and required to perform a checkout at the end of their shift.
- Select **Close checks on driver return** to close the outstanding balance of delivery orders to cash when a driver returns.
- Select **Restrict dispatch to longest in driver** to require that you assign the next order to the driver with the greatest amount of 'idle time' since clocking in or returning from a previous delivery.
- Clear **No order assignment until after bump** unless you are using Aloha Kitchen.
- Type the **number of seconds** to wait after bumping an order in the Aloha Kitchen interface before the system allows you to assign an order to a driver in 'Seconds to wait after bump.'
- Select **Print receipts with itinerary** to print customer receipts for each run order when a driver prints an itinerary.
- Clear **Print state and zip on itinerary** to include (or omit) the state or province name and the ZIP or postal code when the system prints the itinerary for the driver, since the information is rarely different from the location of the store.
- Select **Must authorize cash to store/driver** to require a manager to authorize banks and cash drops between the store and drivers.
- Clear **Prompt for driver password** to not require a driver to enter their login credentials in a confirmation message that appears when dispatching or returning a driver.
- Select **Assign orders to dispatched drivers** to assign orders to a driver who is already on a run. This can improve driver turn-around times by having runs ready upon their return.
- Select **Set maximum driver carrying cash** and enter a dollar amount to establish an upper limit of cash drivers can carry. A message appears requiring drivers with cash over the defined limit to make a drop before they make another run.
- Select **Maximum number of orders per run** and use the arrow keys to limit the maximum number of orders that you can assign to a driver per delivery run. This option limits dispatching drivers with an excessive number of orders, which could impact food quality in later stops. Employees assigned to an access level with 'Override Restricted Dispatch' selected can override this requirement.
- Select **Minimum minutes before the dispatched driver can be returned**, and use the arrow keys to specify the minimum number of minutes expected for each delivery run. Drivers cannot touch 'Dispatch,' then quickly touch 'Return' to select additional preferred orders before they deliver the previous run.
- Clear **Prompt for driver tips on return** to prompt for tips when a driver returns from making deliveries. Drivers can enter tips at any time during their shifts from the Aloha Takeout or POS screens.

- Select **Print address information on driver checkout** to include the addresses of all orders assigned to a driver during their shift on their daily checkout report. This feature allows drivers to confirm the addresses for which they are accountable during their shift.
- Clear **Print receipts on driver dispatch**. Consider selecting this option to print a guest check upon driver dispatch, if you do not print guest checks using the 'Print receipts with itinerary,' 'Items Ordered Receipt Printer,' or 'Print order items receipt count.'
- Select **Restrict delivery orders to delivery area** to require all delivery orders to have addresses within your defined delivery area. Aloha Takeout checks an address when you begin a delivery order. If the selected customer address is not within the defined delivery area, a message prompts you to override the restriction. Employees assigned to an access level with 'Can override delivery area restrictions' can override this restriction.

This option also enables the type-ahead address lookup feature on the FOH. Entering a street number on the 'Customer Entry' screen displays a drop-down of street names that contain the street number. Select a street name from the list to populate the street, as well as the city, state, and ZIP, if configured in the delivery area or default settings.
- Select **Auto cash to store on driver checkout** to transfer the 'Net Cash Owed' from the driver to the cashier assigned to the local terminal cash drawer, when touching 'Checkout' on the Drivers screen. Aloha Takeout automatically performs the 'Cash to store' and 'Cash from driver' cash functions to increase the cash accountability of the cashier and decrease the cash accountability of the driver by the 'Net Cash Owed' amount. This option allows managers to only count the cash drawer of the cashier at the end of the shift, which includes driver cash owed.
- Select **Enable drive time**.
- Select **Enable address type ahead**.
- Select **Enable restrict delivery by guest**. When selected, the system prevents your employees from accepting a delivery order from any customer for which you have restricted delivery. You can enable a manager to override the restricted delivery feature. You can still accept orders from this customer for guest pick up.
- Select **None**, **Dispatch return**, or **Assign dispatch return** from the 'Dispatch workflow' drop-down list.

3. Click **Save**.

Creating petty cash accounts for drivers

You need a total of four **petty cash accounts** to monitor cash moving to and from delivery drivers, and into and out of cash drawers.

| Petty Cash Account Options | | | |
|----------------------------|-------------|---------|---|
| Petty Cash Account | Paid out/in | Affects | Takeout Settings > Takeout tab > Deposits > Cash Accounts |
| Driver Bank | Paid in | Driver | Cash to driver |
| Driver Drop | Paid out | Driver | Cash to store |
| Drop Recv'd | Paid in | Cashier | Cash from driver |
| Bank Fund | Paid out | Cashier | Cash from store |

Driver bank functions (cash distributed to drivers) provide cash for drivers to make change during the initial deliveries of their shift, if needed. Driver 'banks' increase the cash liability for drivers, and decrease cash liability for the cashier.

Cash To Driver — Select 'Cash To Driver,' to designate this as the petty cash account to use when moving "starting bank" money from the cash drawer to the driver, *from the perspective of the driver*.

Cash From Store — Select 'Cash From Store,' to designate this as the petty cash account to use when moving "starting bank" money from the cash drawer to the driver, *from the perspective of the cashier*.

Driver drop functions (cash received in the store from drivers) reduce the cash liability for drivers, and increase cash liability for the cashier accepting the drop. Driver drops are very important, as they help prevent theft or driver assault.

Cash To Store — Select 'Cash To Store,' to designate this as the petty cash account to use when the cashier receives money from the driver, *from the perspective of the driver*.

Cash From Driver — Select 'Cash From Driver' to designate this as the petty cash account to use when the cashier receives money from the driver, *from the perspective of the cashier*.

To create petty cash accounts for use with Aloha Takeout:

1. Select **Maintenance > System Settings > Petty Cash Account**.
2. Create **four petty cash accounts** as shown:

The screenshot shows the 'Petty Cash Account' settings for '11 Driver Bank'. The 'Settings' section includes: Number (11), Name (Driver Bank), Account Type (Paid out), Affects total cash owed (checked), and Starting bank (checked).

Figure 2 - 9 Driver Bank petty cash account

The screenshot shows the 'Petty Cash Account' settings for '12 Driver Drop'. The 'Settings' section includes: Number (12), Name (Driver Drop), Account Type (Paid out), Affects total cash owed (checked), and Report as non-cash tender (None).

Figure 2 - 10 Driver Drop petty cash account

The screenshot shows the 'Petty Cash Account' settings for '13 Drop Recv'd'. The 'Settings' section includes: Number (13), Name (Drop Recv'd), Account Type (Paid in), Affects total cash owed (checked), and Starting bank (checked).

Figure 2 - 11 Drop Received petty cash account

The screenshot shows the 'Petty Cash Account' settings for '14 Bank Fund'. The 'Settings' section includes: Number (14), Name (Bank Fund), Account Type (Paid out), Affects total cash owed (checked), and Report as non-cash tender (None).

Figure 2 - 12 Bank Fund petty cash account

3. Click **Save** and exit the **Petty Cash Account** function.

To align POS petty cash accounts with Aloha Takeout:

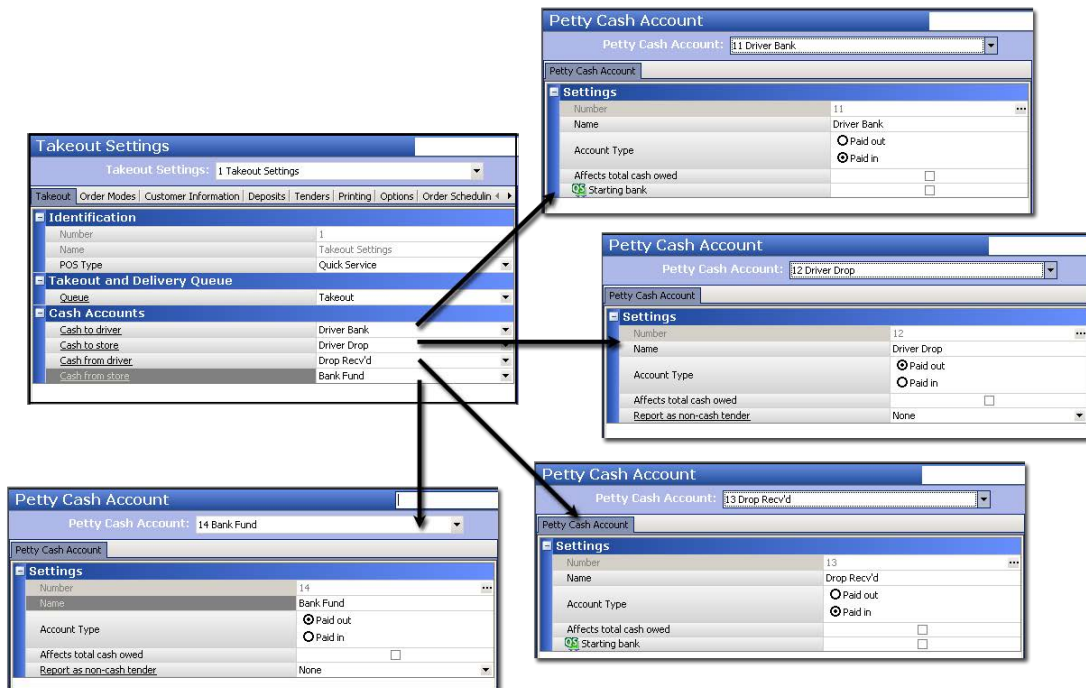


Figure 2 - 13 POS petty accounts alignment with Aloha Takeout

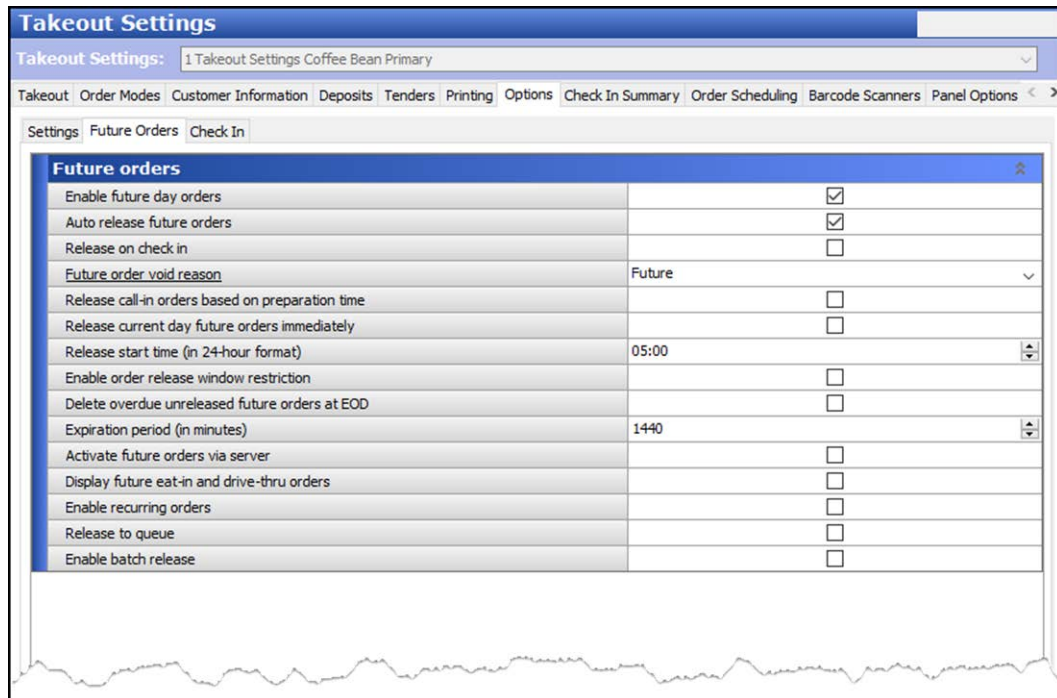
1. Select **Maintenance > Takeout Configuration > Takeout Settings**.
2. Under the 'Cash Accounts' group bar, align each **cash account** to the petty cash accounts defined in the POS for Aloha Takeout.
3. Click **Save**.



Caution

You must use Aloha POS v6.7 or later for cash drawer detection.

Configuring future orders



| Future orders | |
|--|-------------------------------------|
| Enable future day orders | <input checked="" type="checkbox"/> |
| Auto release future orders | <input checked="" type="checkbox"/> |
| Release on check in | <input type="checkbox"/> |
| Future order void reason | Future |
| Release call-in orders based on preparation time | <input type="checkbox"/> |
| Release current day future orders immediately | <input type="checkbox"/> |
| Release start time (in 24-hour format) | 05:00 |
| Enable order release window restriction | <input type="checkbox"/> |
| Delete overdue unreleased future orders at EOD | <input type="checkbox"/> |
| Expiration period (in minutes) | 1440 |
| Activate future orders via server | <input type="checkbox"/> |
| Display future eat-in and drive-thru orders | <input type="checkbox"/> |
| Enable recurring orders | <input type="checkbox"/> |
| Release to queue | <input type="checkbox"/> |
| Enable batch release | <input type="checkbox"/> |

Figure 2 - 14 Takeout Settings > Options tab > Future Orders tab

1. Under the Future orders group bar, select **Enable future day orders**. Enabling this feature activates the ability to create orders for a future order and adds a 'Start Delayed' button to the Aloha Takeout FOH Look Up screen.
2. Select **Activate future orders via server**. Enabling this feature releases future orders from the BOH without the need for an ATO instance running on a FOH terminal. For this new functionality to work properly, the ATO service should be configured to start an instance of the Aloha POS system on the BOH system.
3. Select **Enable recurring orders**. This feature enables you to schedule recurring orders for your customers. Aloha POS v13.1 is required to enable this feature.
4. Click **Save**.



Reference

Refer to the [Future Orders and Deposits Feature Focus Guide - HKS360](#) for more information.

Creating items for use with future orders

To support the Aloha Takeout Future Orders feature, you must create the following items in the Aloha POS system Items function: Deposit, Deposit Surrender, and Unavailable Item Indicator. We recommend you do not attach these items to a submenu or panel, to prevent employees from adding

them to a check through the Aloha POS system and only allow the system to add them to deposit checks, as needed.



Reference

Refer to the [Future Orders and Deposits Feature Focus Guide - HKS360](#) for more information.

Creating a deposit item

When you need to charge a deposit for a future order, the Aloha Takeout 'Add Deposit' function creates a check and adds the deposit item to a check in the amount of the deposit. The check is tendered and closed based on the tender you selected on the ATO Deposit screen, as determined by the customer.

Figure 2 - 15 Items alignment for Deposit item

1. Select **Maintenance > Menu > Items > Item** tab.
2. Click the **New** drop-down arrow, select **Standard** as the item type, and click **OK**.
3. Under the 'Settings' group bar, type a **name** for the deposit item in 'Short name.' The system automatically populates 'Chit name' and 'Long name' when you save.
4. Select **Ask for description** to enable the system to replace the 'Short name,' 'Chit name,' and 'Long name' with deposit information on the check.
5. Under the 'Assignments' group bar, select a **tax group** associated with a tax type for which there is a zero percent tax rate. Do not define a tax group for which there is a tax rate other than zero

percent for the deposit item. Aloha Takeout cannot fully tender the check, if tax is calculated on this item.

6. Select a **category** under which you would like deposits to report from the 'Sales/retail category' drop-down list.
7. Select the **Pricing** tab.
8. Select **Ask for Price** from the 'Pricing method' drop-down list. The system automatically enters the price based on the deposit amount selected on the Deposit screen.
9. Select the **General Settings** tab.
10. Select **Revenue item**.
11. Click **Save** and exit the **Items** function or continue to the **next procedure**.



Note

Items configured as 'Revenue items' in the Aloha POS system do not affect sales. When a customer adds a deposit to a future order, this transaction is not recognized as sales.



Tip

Do not define a tax group for which there is a tax rate other than zero percent for the deposit item. Aloha Takeout cannot fully tender the check, if tax is calculated on this item.



Tip

For other options in 'Pricing method' other than Ask for Price, such as Item Price, Price Level, or Quantity Price, clear Restrict price edit. Navigate to Restrict price edit by going to Maintenance > Business > Additional Features > Restriction settings bar.

Creating a deposit surrender item

A surrendered deposit occurs when a guest cancels or fails to pick up their order within company guidelines. You can perform the deposit surrender function to offset the cost of prepared food and labor costs. When this occurs, you must surrender the deposit through the Edit Deposits function on the ATO Deposit screen.

Aloha Takeout creates a new check and adds the deposit surrender item in the amount of the deposit selected on the Deposit screen. The system automatically closes the check to the Deposit tender you

defined earlier. The system recognizes deposit surrender transactions as sales to offset the deposit payment received earlier.

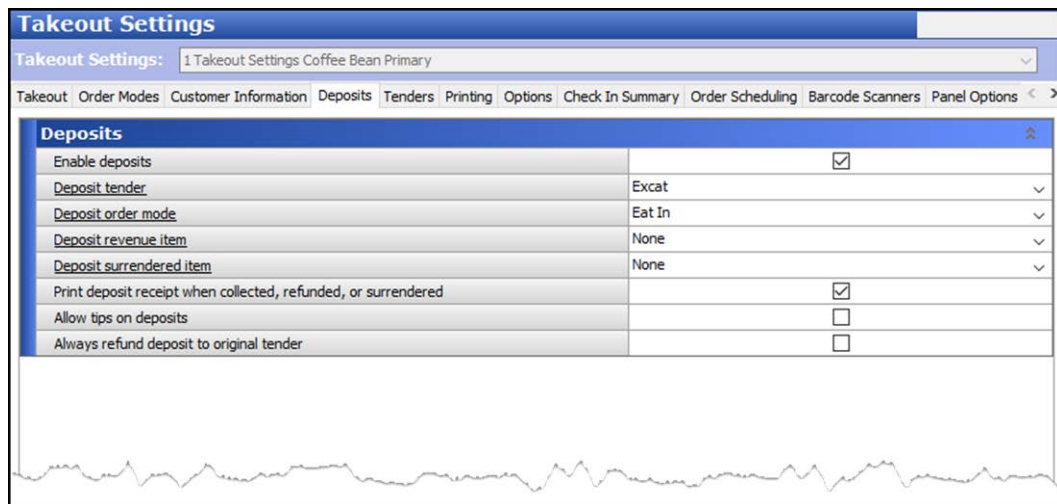
The figure consists of two screenshots of the 'Items' configuration window in Aloha Takeout. The top screenshot shows the 'Settings' tab for item '900002 DepositSurrender RETAIL'. The 'Settings' section includes fields for Number (900002), Short name (Dep. Surrender), Chit name (Dep. Surrender), Long name (DepositSurrender), Type (Standard), Button image (None), Control name, Ask for description (checked), Cost (0.0000), and Export Id (0). The 'Assignments' section shows Tax group (Tax Group 1), Concept (None), and Sales/retail category (RETAIL). The 'Auto menu' section shows Priority (1 Highest). The bottom screenshot shows the 'Pricing' tab for the same item. The 'Pricing options' section includes 'Eligible for fixed pricing' (checked), 'Pricing method' (Ask for Price), 'Minimum price' (0.00), and 'Maximum price' (999999.99).

Figure 2 - 16 Items alignment for deposit surrender

1. Select **Maintenance > Menu > Items > Item** tab.
2. Click the **New** drop-down arrow, select **Standard** as the item type, and click **OK**.
3. Under the 'Settings' group bar, type a **name** for the deposit surrender item in 'Short name.' The system automatically populates 'Chit name' and 'Long name' when you save.
4. Select **Ask for description** to enable the system to replace 'Short name,' 'Chit name,' and 'Long name' with deposit surrender information on the check.
5. Under the 'Assignments' group bar, select a **tax group** to associate with a tax type for which there is a zero percent tax rate.
6. Select a **category** under which you would like the deposit surrender item to report from the 'Sales/category' drop-down list.
7. Select the **Pricing** tab.
8. Select **Ask for Price** from the 'Pricing method' drop-down list. The system automatically enters the price based on the surrendered deposit amount selected on the Deposit screen.
9. Click **Save** and exit the **Items** function.

Configuring deposits for future orders

The options available on the Deposits tab enables the use of deposits and help you specify how Aloha Takeout and the Aloha POS system interact to make use of it. Deposits are used to prepay part or all of a future order to cover labor and food costs in the event a customer abandons the order. You may add multiple deposits to a future order until the system releases the order to the kitchen.



| Takeout Settings | |
|---|-------------------------------------|
| Takeout Settings: 1 Takeout Settings Coffee Bean Primary | |
| Takeout Order Modes Customer Information Deposits Tenders Printing Options Check In Summary Order Scheduling Barcode Scanners Panel Options | |
| Deposits | |
| Enable deposits | <input checked="" type="checkbox"/> |
| Deposit tender | Excat |
| Deposit order mode | Eat In |
| Deposit revenue item | None |
| Deposit surrendered item | None |
| Print deposit receipt when collected, refunded, or surrendered | <input checked="" type="checkbox"/> |
| Allow tips on deposits | <input type="checkbox"/> |
| Always refund deposit to original tender | <input type="checkbox"/> |

Figure 2 - 17 Takeout Settings > Deposits tab

Configure the following options based on the POS tender, order mode, and item configuration performed earlier.

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Deposits** tab.
2. Select **Enable deposits**. When selected, other deposit configuration options appear.
3. Select the **tender** you created for use with future order deposits from the 'Deposit tender' drop-down list.
4. Select the **order mode** to apply when the system creates a deposit check from the 'Deposit order mode' drop-down list.



Tip

Do not configure a service charge for the deposit order mode. Aloha Takeout cannot fully tender the deposit, if you configure a service charge.



Tip

As a best practice, we recommend a separate, non-Aloha Takeout order mode, with no surcharges configured. Apply taxes to deposits in accordance with local tax regulations.

5. Select the **item** you specifically created for adding a deposit to a guest check from the 'Deposit revenue item' drop-down list. Adding a deposit item to the guest check allows you to accept the deposit payment from the guest without affecting sales amounts for the day.
6. Select the **item** you specifically created for surrendering a deposit due to canceled orders from the 'Deposit surrendered item' drop-down list. Adding a deposit surrendered item to a guest check allows you to recognize sales for the deposit payment received earlier.
7. Enable **Print deposit receipts when collected, refunded, or surrendered** to print a guest check any time you complete an activity related to deposits.
8. Select **Allow tips on deposits** to allow you to enter a tip at the same time you accept a deposit for a future order.
9. Select **Always refund deposit to original tender** to force you to refund a deposit back to the original tender the guest used to pay the deposit. For example, if a guest pays a deposit with a Visa payment card, the deposit refund must go back on the same Visa payment card.

New Deposit

PO Number: 081113001010006
Deposit ID: 4294967298
Paul Langenbahn
12245 OSPREY DR
Alpharetta, GA 30004
(770) 685-5541

Sandwich Shop
3925 Brookside Pkwy

Host: Aloha 11/13/2008
Paul Langenbahn 10:17 AM
10007

Deposit For 25.00
Subtotal 25.00
Dine In Total 25.00
Cash 25.00

Thank you!
Come Again!
--- Check Closed ---

Figure 2 - 18 Example, printed deposit receipt

Receipts for other transactions related to deposits appear very much the same as this one. The information included on these receipts varies, depending upon the type of payment, the type of customer, and more.

Creating an unavailable item indicator

The unavailable item indicator prints on the kitchen chit when the system cannot order an item when releasing a future order due to:

- The parent item is unavailable in Item Availability in the POS.
- Modifier requirements are not met.
- A modifier associated with the parent item is unavailable in Item Availability in the POS.
- The parent or modifier item ID was deleted in Item Maintenance.

An * Unavailable Items * section prints in the Aloha Takeout header, alerting you that there are unavailable items on the order. This feature forces a kitchen chit to print, even when there is only one item on the order and it is unavailable.

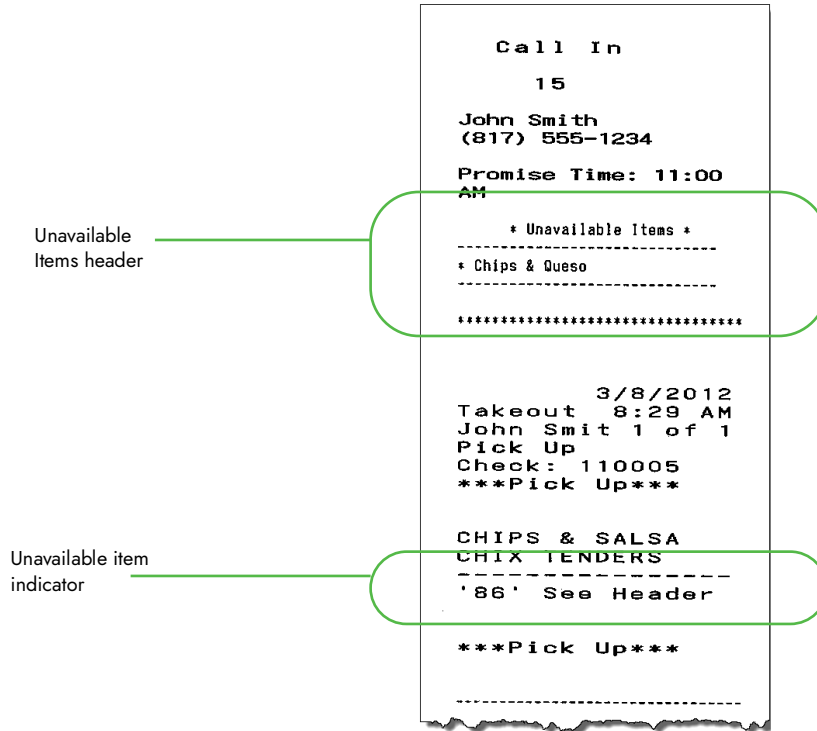


Figure 2 - 19 Unavailable item chit

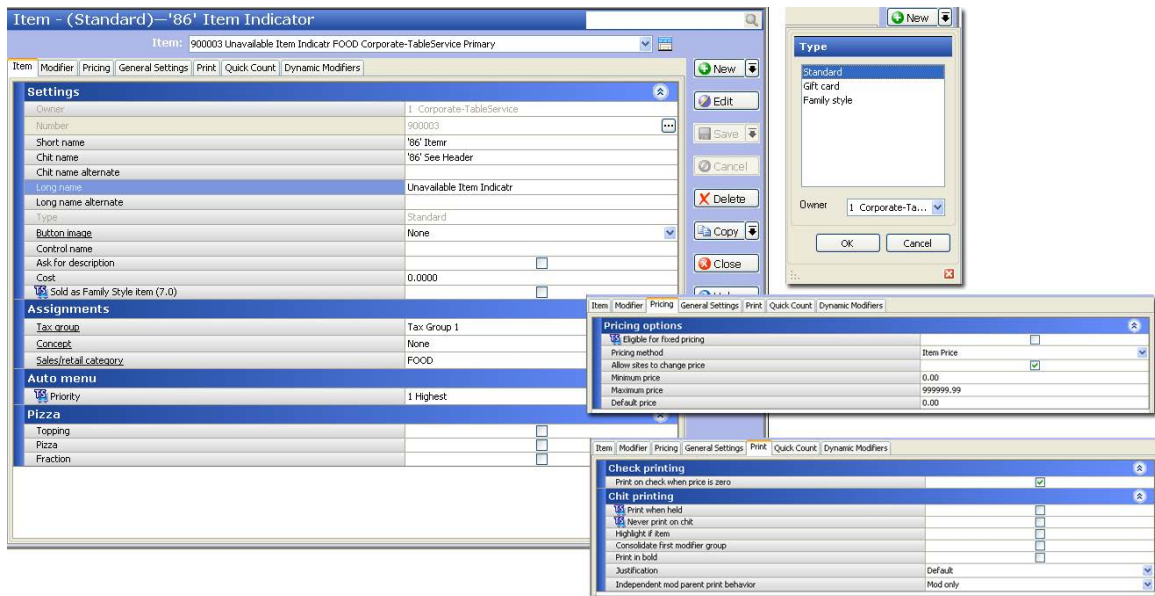


Figure 2 - 20 Items alignment for unavailable item indicator

To create a POS item for use as the unavailable item indicator:

1. Select **Maintenance > Menu > Items > Item** tab.
2. Click the **New** drop-down arrow, select **Standard**, and click **OK**.
3. Under the 'Settings' group bar, type **text** in 'Chit name,' to alert you an item could not be ordered when the system released a future order.
4. Under the 'Tax Group' group bar, select a **tax group** associated with a tax type for which there is a zero percent tax rate.
5. Select the **sales/retail category** under which you would like the unavailable items to report.
6. Select the **Pricing** tab.
7. Select **Item Price** from the 'Pricing method' drop-down list.
8. Set the 'Default price' to **0.00**.
9. Select the **Print** tab.
10. Select **Print on check when price is zero**.
11. Click **Save** and exit the **Items** function or continue with the **next procedure**.

To route the POS item for use as the unavailable item indicator to all kitchen printers:

1. Access **Maintenance > Menu > Item Routing**.
2. Select the **item** you created for unavailable items from 'Available' and click the right arrow to move it to 'Included.'

3. Select the **item** you created for unavailable items in the previous step, click the **printer group** drop-down list, and select a **printer group** that includes to all kitchen printers to alert you of a missing item no matter where you are standing in the kitchen.
4. Click **Save** and exit the **Item Routing** function.



Tip

Do not associate the item created to indicate an unavailable item to a button on a submenu or modifier panel.

To associate the POS item as the 'Unavailable item indicator' in Aloha Takeout:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Printing** tab.

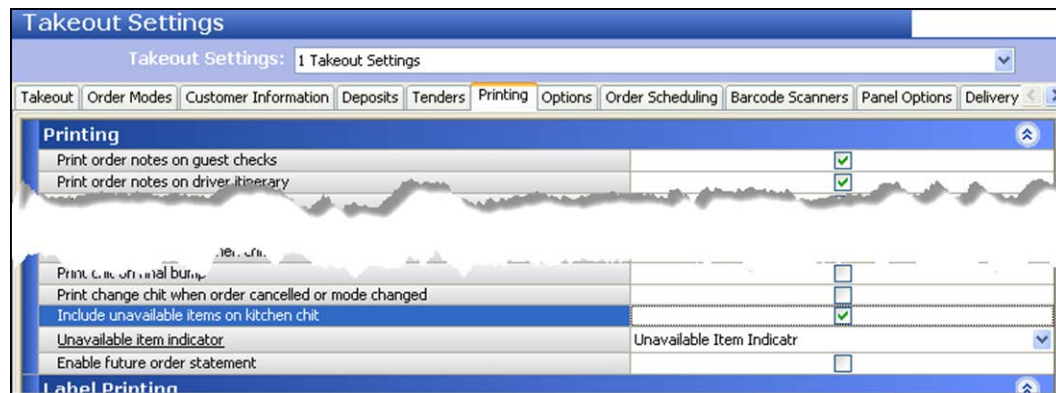


Figure 2 - 21 Takeout Settings - Printing - Unavailable Items options

2. Under the 'Printing' group bar, select **Include unavailable items on kitchen chit**.
3. Select the **item created in the POS as the unavailable item indicator** from the drop-down list.
4. Click **Save**.

Configuring integration between Aloha Takeout and Aloha Kitchen

When you install and operate Aloha Kitchen and Aloha Takeout together, the products continually ‘talk’ to each other through the databus messaging service and allow you to automate and optimize specific areas of your operations. This reduces repetitive and unnecessary data and ultimately yields a more streamlined and robust solution across all products. If you are not using this product, clear ‘Enable Kitchen interface.’

Through integration, you can:

- Manage ATO quote times more efficiently.
- Manage the release of an ATO future order to AK.
- Leverage the ATO guest name in Aloha Kitchen.
- Send the cooking status from AK to ATO.
- Print ATO artifacts upon AK bump.
- Leverage the ATO phone number for AK text paging.
- Display ATO information on AK video cell.



Reference

Refer to the [Aloha Takeout and Aloha Kitchen Integration Guide - HKS327](#) for more information on configuring integration between Aloha Takeout and Aloha Kitchen.

Enabling redundancy in Aloha Takeout

ATO provides similar offline functionality to the POS in the event the BOH file server is unavailable on the network.

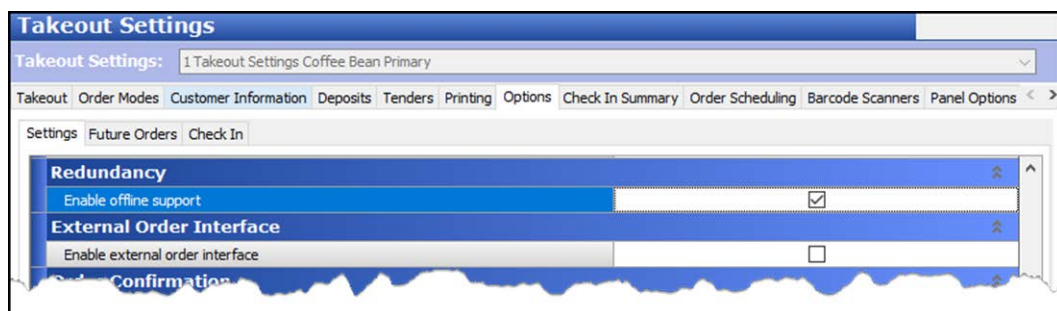


Figure 2 - 22 Takeout Settings > Options tab > Redundancy group bar

Select **Enable offline support** to allow the system to write order information to the offline folders on each ATO terminal. The system uses this information if the terminals cannot connect to the BOH file server and Aloha Takeout database.

Disabling the Aloha Takeout external order interface

The external order interface functionality is reserved for future versions of Aloha Takeout.

External Order Interface:

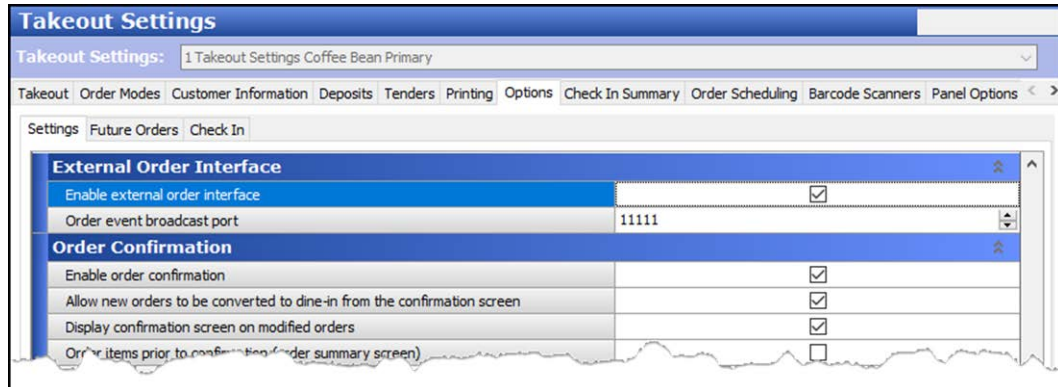


Figure 2 - 23 Takeout Settings > Options tab > External Order Interface group bar

Clear **Enable External Order Interface**. This feature is currently not supported by Aloha Takeout.

Enabling the order confirmation screen

The confirmation screen allows you to review the order, promise time, and contact information with a customer before finalizing the order and sending it to the kitchen. If adjustments are needed, you can return to the POS to edit the order, change , or change the promise time to a later time or date.

| Order Confirmation | | |
|---|--|-------------------------------------|
| Enable order confirmation | | <input checked="" type="checkbox"/> |
| Allow new orders to be converted to dine-in from t... | | <input checked="" type="checkbox"/> |
| Display confirmation screen on modified orders | | <input checked="" type="checkbox"/> |
| Order items prior to confirmation (order summary s... | | <input checked="" type="checkbox"/> |
| Calculate promise time based on order confirmation... | | <input checked="" type="checkbox"/> |
| Enable prepaid tender | | <input checked="" type="checkbox"/> |
| Enable deposits on order confirmation | | <input checked="" type="checkbox"/> |

Figure 2 - 24 Options tab - Order Confirmation group bar

| Takeout Settings | | |
|---|------|-------------------------------------|
| Takeout Settings: 1 Takeout Settings Coffee Bean Primary | | |
| Takeout Order Modes Customer Information Deposits Tenders Printing Options Check In Summary Order Scheduling Barcode Scanners Panel Options | | |
| Settings Future Orders Check In | | |
| Order Confirmation | | |
| Enable order confirmation | | <input checked="" type="checkbox"/> |
| Allow new orders to be converted to dine-in from the confirmation screen | | <input checked="" type="checkbox"/> |
| Display confirmation screen on modified orders | | <input checked="" type="checkbox"/> |
| Order items prior to confirmation (order summary screen) | | <input checked="" type="checkbox"/> |
| Calculate promise time based on order confirmation time | | <input checked="" type="checkbox"/> |
| Enable prepaid tender | | <input checked="" type="checkbox"/> |
| Enable deposits on order confirmation | | <input checked="" type="checkbox"/> |
| Enable checks on order confirmation | | <input checked="" type="checkbox"/> |
| Customer Credit | | |
| Enable customer credit | | <input type="checkbox"/> |
| Credit comp ID | None | <input type="checkbox"/> |
| Roll over surplus credits | | <input type="checkbox"/> |

Figure 2 - 25 Takeout Settings > Options tab - Order Confirmation group bar

1. Under the 'Order Confirmation' group bar, select **Enable order confirmation** to have an order summary dialog appear on the FOH for employees to confirm an order with a customer before finalizing. When selected, additional order confirmation options appear.
2. Clear **Allow new orders to be converted to dine-in from the confirmation screen**. Select this option only if it is possible to convert new unordered takeout orders to dine-in orders with Quick Service. This option requires you to map the "Dine-In" order mode to a POS order mode on the **Takeout Settings > Order Modes** tab.
3. Clear **Display confirmation screen on modified orders** to prevent the confirmation screen from appearing each time you recall and re-finalize an ATO check.
4. Clear **Order items prior to confirmation (order summary screen)**, if using Aloha POS v6.7 or later. You only need this option if using POS v6.5 and earlier or Aloha Takeout v1.1, to

calculate the delivery fee before the confirmation screen appears. Earlier POS and ATO versions require you to order items before the POS can calculate a delivery fee.

5. Select **Enable deposits on order confirmation** to place the Deposit button on the Order Confirmation screen, which allows you to add a deposit for a future order while on the screen.
6. Select **Calculate promise time based on order confirmation time** to calculate the promise time based on when you finish placing the order, instead of when you begin placing the order. Use this option for menus you feel may anticipate several questions from the guest, such as for a complex pizza environment.

Configuring customer credit

When customers experience trouble with an order, you can often make amends with a customer credit for their next order. You accomplish this by creating a comp in the Aloha POS system specifically for use with Aloha Takeout and enabling the 'customer credit' feature in Aloha Takeout.

Aloha Takeout enables you to let a customer rollover any unused credits toward their next order. Additionally, you can configure the system to inform employees when a customer has an unused credit. Previously, the system applied the payment without applying the unused credit.

To create the customer credit comp:

1. With TS or QS selected in the product bar, select **Maintenance > Payments > Comps.**

| Settings | |
|---|-------------------------------------|
| Owner | 1 Coffee Bean |
| Number | 1 |
| Name | Customer Credits |
| Type | Regular |
| Active | <input checked="" type="checkbox"/> |
| Check name | Customer Credits |
| Method | Prompt for amount |
| Maximum amount | \$0.00 |
| Allow before items ordered | <input type="checkbox"/> |
| First available button position | <input type="checkbox"/> |
| Button position | None |
| Report as | Default |
| Print check on close | <input type="checkbox"/> |
| Open drawer on close | <input type="checkbox"/> |
| Manager required | <input checked="" type="checkbox"/> |
| Include comp amount in tippable sales | <input type="checkbox"/> |
| Include comp amount in gratuity calculation | <input type="checkbox"/> |
| Must select items | <input type="checkbox"/> |
| Prompt for unit (store number) | <input type="checkbox"/> |
| Prompt for name | <input type="checkbox"/> |
| Text entry required | <input type="checkbox"/> |

Figure 2 - 26 Customer Credit comp for Aloha Takeout

2. Click **New**, select **Regular** as the comp type, and click **OK**.
3. Under the 'Settings' group bar, type a **name** and a **check name**. (Required)
4. Type the **maximum amount allowed** for the comp. (Recommended)
5. Select **Active**. (Required)
6. Select **Manager required**, to require a manager to approve the comp. (Optional)

The POS access level for the logged in employee determines if the employee can authorize a customer credit; if not, the system presents a screen for manager approval.

7. Select **Prompt for amount** from the 'Method' drop-down list to enable ATO to pass the credit amount to the POS (Required).



Note

After configuring Aloha Takeout to make use of this comp, an employee can credit the customer any amount; however, two factors limit customer credits when applying the comp:

If the customer credit value associated with the guest exceeds the 'Maximum amount' threshold defined for the comp, the POS limits the credit to the 'Maximum amount' threshold.

— OR —

If the customer credit value associated with the guest exceeds the subtotal of the check, the POS limits the credit to the subtotal of the check.

8. Click **Save** and exit the **Comps** function.

To enable the customer credit feature in Aloha Takeout:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.

The screenshot shows the 'Takeout Settings' window with the 'Options' tab selected. The 'Customer Credit' group bar is highlighted with a red rectangle. The settings within this group are:

| Setting | Value |
|----------------------------|-------------------------------------|
| Enable customer credit | <input checked="" type="checkbox"/> |
| Credit comp ID | Customer Credits |
| Roll over surplus credits | <input type="checkbox"/> |
| Prompt to apply on payment | <input type="checkbox"/> |

Figure 2 - 27 Takeout Settings > Options tab > Customer Credit group bar

2. Under the 'Customer Credit' group bar, select **Enable customer credit**.
3. Select the **comp** created specifically for Aloha Takeout from the 'Credit comp ID' drop-down list.

4. Select **Roll over surplus credits** to add unused customer credits back onto a customer account for use on their next order.
5. Select **Prompt to apply on payment** to prompt the FOH employee to ask a customer if they want to apply unused credits toward their check.
6. Click **Save**.

Creating house accounts for Aloha Takeout

House accounts is a feature of the Aloha POS system that tracks the activity of customers you allow to bill to an account. As a customer places and receives an order, you can tender the order to that customer account. The system stores each new transaction and updates account balances throughout a billing cycle. Most activity is entered through the FOH when you tender an order to a house account. Functions on the BOH allow you to post adjustments to a house account. Adjustments include payments, credits, or debit transactions.

Select Reports > Aloha Point-of-Sale > House Accounts and the House Account function tab appears, where you can run periodic reports for house accounts. Typically, you will print and send these reports (statements) to the house account contact for reimbursement at the end of a billing cycle. Once you have sent a statement, click **Balance** to reset each account for the next billing cycle. The balance process updates the 'previous balance' with the 'ending balance,' and removes transaction detail so only new transactions appear on the new billing cycle house account report.

Configuring culture

You can configure the system to display an on-screen keyboard that matches your language. Switching to an international keyboard requires you to configure Aloha Takeout as well as the Windows operating system for the terminal. If the keyboard settings for Aloha Takeout and the Windows operating system do not match, Aloha Takeout displays the default US keyboard.



Reference

Refer to the [Localization Feature Focus Guide - HKS370](#) for detailed information on configuring and using the culture settings.

Configuring auto database backup

Your data is one of the most valuable assets to your business. Computers fail for a variety of reasons and having a backup of your data to restore is invaluable. The Aloha Takeout backup enables you to save a copy of the Aloha Takeout SQL Express database in the event of a computer failure. You can configure the system to automatically back up your database or you can manually create a backup at any time.



Reference

Refer to the [Backup and Restore Feature Focus Guide - HKS337](#) for detailed information on configuring the auto database backup.

Configuring tax by destination

Tax regulations may require you to assess taxes based on the location to which you deliver or cater an order rather than the location of your restaurant, referred to as 'tax by destination.' Aloha Takeout v13.1 enables you to easily comply with tax by destination using tax functionality available in the Aloha POS system, and options available in Aloha Takeout. The Tax by Destination feature keys off of the ZIP code to which you deliver or cater an order. If the ZIP code is one for which tax by destination rules apply, the system calculates the tax using the tax rate you establish for that ZIP code.

If you are a site already using Aloha Takeout, not a new installation, do not alter your existing tax types or flex tax rules, as you use these for calculating taxes based on the location of your store. You do, however, need to build on your existing tax structure and create new tax types and flex tax rules specifically for supporting the Tax by Destination feature.

SCENARIO: Your restaurant resides in ZIP code 76155 and delivers to two additional ZIP codes, 76021 and 76039, which are subject to different tax rates than ZIP code 76155. Additionally, delivered bottled water is not subject to tax. It is necessary for you to configure and use the Tax by Destination feature.



Reference

Refer to the [Tax by Destination Feature Focus Guide - HKS383](#) for more information.

Configuring bag manifests

You have the ability to print two types of bag manifests, Item Checklist and Order Checklist, to increase order accuracy and guest satisfaction. You can also create and include sundry items on the bag manifest, for such things as plastic ware and condiments, to ensure you provide your customers with everything they need to enjoy their meal. You configure when, how, where, and what to include on each type of bag manifest.



Reference

Refer to the [Bag Manifests Feature Focus Guide - HKS338](#) for more information.

Configuring source and destination in order modes

Orders with an online component, such as a web page, a phone app, or an off-site delivery service require both a source and destination for the system to read prior to injecting an order in the system. Because you can configure more than one destination for a source, You must designate at least one destination as the default or order injection fails.



Reference

As of ATO v19.x, you must define a Source and Destination record to address all order sources leveraged by an online ordering solution, such as a store website and a delivery marketplace. This enables the online ordering solution to inject orders into ATO. If this record does not exist, order injection fails. Refer to the [Source and Destination Feature Focus Guide - HKS380](#) for more information.

Creating a grocery item category

Aloha Takeout requires you create a grocery item category so that you can print a consolidated count of these items on a driver itinerary. The objective is for the driver to check the 'grocery item' section of the driver itinerary and confirm they have the appropriate number of these items before they depart for a delivery run. Examples of grocery items include canned and bottled beverages, pre-made salads, and extra sauce packets.

1. Select **Maintenance > Menu > Categories > Category** tab.

| Categories | |
|--------------------------------------|-------------------------------------|
| Category: 12 ATO Grocery Cat General | |
| Category | Items |
| Settings | |
| Number | 12 |
| Name | ATO Grocery Cat |
| Description | |
| Type | General |
| Suggestive | <input type="checkbox"/> |
| PMS sales category | 0 |
| Accounts receivable sales category | None (0) |
| Maximum per check | 999 |
| Aloha Takeout | |
| Aloha Takeout Grocery Category | <input checked="" type="checkbox"/> |

Figure 2 - 28 Categories (Grocery Items)

2. Click the **New** drop-down arrow, select **General** as the category type, and click **OK**.
3. Under the 'Settings' group bar, type a **name** for the category.
4. Under the 'Aloha Takeout' group bar, select **Aloha Takeout Grocery Category**.
5. Select the **Items** tab.
6. Use the **arrows** to move grocery items from the Available list box to the Included list box.
7. Click **Save** and exit the **Categories** function.

Configuring order scheduling

Aloha Takeout (ATO) enables you to define how you view orders on the Future and Dispatch screens. You can configure the display view for a time segment that best meets your operational needs. In conjunction with Order Scheduling, Capacity Tracking enables you to limit the number of future orders or items the system can accept during a defined time segment, reducing the number of customer complaints received as a result of over-committed drivers and kitchen resources. The system manages the available time segments across multiple terminals on a first-come first-serve basis.

A Capacity Detail button, available on the ATO Front-of-House (FOH), provides you with an on-screen list of orders for a specific time frame compared to your configured order scheduling limits. When you reach the limit of your defined order capacity, the system prevents you from accepting a delivery or catering order for that time period; however, you can still accept the order for pickup, or for a different time period. In the event you want to accept a delivery or catering order for the time period in which you have already reached your capacity limit, we recommend you provide an employee, such as a manager, the ability to override the order capacity limit.

SCENARIO: In your restaurant, you schedule two drivers to work during lunch. Each driver can make two deliveries per fifteen-minute period, for a total of four deliveries per fifteen-minute period during lunch. Unless a manager overrides the limitation, the ATO capacity tracking feature prevents you from accepting more orders for delivery than your scheduled drivers can handle, such as five or more orders during a fifteen-minute period during lunch.



Reference

See the [Order Scheduling and Capacity Tracking Feature Focus Guide - HKS371](#) for information on implementing order scheduling in Aloha Takeout.

Configuring bar code scanners

In this scenario, the customer orders takeout items, then shops in the convenience store while the takeout items are prepared. The customer is provided a check containing a bar code. When the customer and the order are both ready, the cashier accesses the ATO Orders screen, and scans the bar code on the customers check to quickly recall their order. The cashier adds any convenience store items to the check as normal. When all takeout and convenience store items are added to the check, the customer pays for the entire order.



Reference

See the [Bar Code Scanners Feature Focus Guide - HKS339](#) for more information on this feature.

Configuring the Aloha Takeout FOH screens

Use the Panel Options tab to modify certain aspects of the user interface behavior, to meet specific needs in your business.

Using panel options to configure the 2nd generation user interface

Aloha Takeout v12.1 automatically activates Enable 2nd generation UI. When selecting the 'Enable 2nd Generation UI' option, additional tabs appear to customize columns, buttons, and other elements on the Aloha Takeout screens.



Tip

Most tabs have a Columns and/or an Actions section, with an Available and Selected list in each section.

Use Add to select columns, order modes, actions, and elements to appear on an ATO screen.

Use Move up and Move down to rearrange items in the selected list and customize the order in which they appear on ATO screens.

To select the Quick Service screen to appear when you touch Tender in Aloha Takeout:

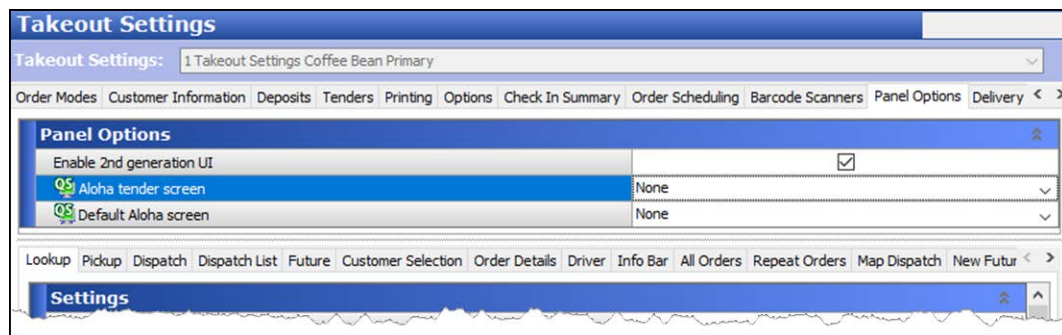


Figure 2 - 29 Takeout Settings > Panel Options tab

If 'POS Type' is set to Quick Service, select the **Aloha POS tender screen**, using the drop-down list, to appear when you touch the Tender button in Aloha Takeout.



Tip

You may need to create a new screen with an attached panel of tender buttons, specifically for this functionality.

Panel Options: Lookup tab

The options on the Lookup tab apply only to the appearance and behavior of the Look Up screen.

The screenshot shows the 'Takeout Settings' application window. At the top, there's a title bar 'Takeout Settings' and a dropdown menu showing '1 Takeout Settings Coffee Bean Primary'. Below this is a navigation bar with tabs: Order Modes, Customer Information, Deposits, Tenders, Printing, Options, Check In Summary, Order Scheduling, Barcode Scanners, Panel Options (selected), and Delivery. The 'Panel Options' tab is active, showing a table with two rows: 'Aloha tender screen' and 'Default Aloha screen', both set to 'None'. Below this is another navigation bar with tabs: Lookup (selected), Pickup, Dispatch, Dispatch List, Future, Customer Selection, Order Details, Driver, Info Bar, All Orders, Repeat Orders, Map Dispatch, and New Futur. The 'Lookup' sub-tab is active, showing a 'Settings' section with 'Auto search timeout (seconds)' set to 1 and 'Enable sort order' unchecked. Below the settings is a 'Columns' section with a table listing columns: VIP Column, Orders Column, Customer Column, Address Column, and Home Phone Column. To the right of the table are buttons: Add, Remove, Move up, and Move down.

Figure 2 - 30 Takeout Settings > Panel Options tab > Lookup tab

To configure settings for the Lookup tab:

1. Type the **number of seconds** after you stop typing characters in the search box that the system waits before automatically performing a search of customers that meet the search criteria, in 'Auto search timeout (seconds).' **Recommended:** 1 second.
2. Select **Enable sort order** to configure multiple sorting levels and display the Sort Orders tab.

To add columns to the Look Up screen:

Determine which **columns** appear on the Look Up screen, and the order in which the columns appear, from left to right.

1. Click **Add**, select the **type of column** from the drop-down list, and click **OK** to add the column to the active list.
2. Click **Move up** and **Move down** to organize the columns from left to right as they appear on the Look Up screen.
3. Repeat **this procedure** for each column to appear on the Look Up screen.
4. Click **Save**.

Recommended Configuration: Add columns that help you quickly select the correct customer in the search results, or that provide customer status that may be helpful in the order entry process. Do not add columns that are not used by your operation.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of columns.

To add order modes to the Look Up screen:

Determine which **order modes** appear on the Look Up screen, and the order in which the order mode buttons appear, from top to bottom.

1. Click **Add**, select an **order mode type** from the drop-down list, and click **OK** to add the order mode to the active list.
2. Click **Move up** and **Move down** to organize the order mode buttons from top to bottom on the right side of the Look Up screen.
3. Repeat the procedure for each **order mode** supported in your operation.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of order modes.

To add sort order to the Look Up screen:

You can configure multiple sorting levels for displaying the list of guests on the Look Up screen. For example, you can configure the returned list to sort by Last Name, then by Home Phone. When cleared, the system returns the list based on the order they are found.

1. Click **Add**, select a **sort order** from the drop-down list, and click **OK**.
2. Click **Move up** and **Move down** to organize the columns from left to right as they appear on the Look Up screen.
3. Repeat **this procedure** for each sort order on the Look Up screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of sort orders.

Panel Options: Pickup tab

The options on the Pickup tab apply only to the appearance and behavior of the Pick Up screen.

The screenshot shows the 'Takeout Settings' application window. At the top, there's a title bar 'Takeout Settings' and a dropdown menu showing '1 Takeout Settings Coffee Bean Primary'. Below this is a navigation bar with tabs: Order Modes, Customer Information, Deposits, Tenders, Printing, Options, Check In Summary, Order Scheduling, Barcode Scanners, Panel Options (selected), and Delivery. The main content area is divided into two sections. The top section is 'Panel Options' with a blue header. It contains three rows: 'Enable 2nd generation UI' with a checked checkbox, 'Aloha tender screen' with a dropdown set to 'None', and 'Default Aloha screen' with a dropdown set to 'None'. Below this is another navigation bar with tabs: Lookup, Pickup (selected), Dispatch, Dispatch List, Future, Customer Selection, Order Details, Driver, Info Bar, All Orders, Repeat Orders, Map Dispatch, and New Futur. The bottom section is 'Settings' with a blue header. It contains four rows: 'Auto search timeout (seconds)' with a value of '1', 'Enable quick detail' with an unchecked checkbox, 'Auto scroll order list to top' with an unchecked checkbox, and 'Bypass filters on search' with an unchecked checkbox. At the bottom of the window is a 'Columns' section with a blue header. It has a table with columns 'Column name' and 'Actions'. The table lists: VIP Column, Orders Column, Customer Column, Address Column, Contact Phone Column, Order Status Column, and Total Column. To the right of the table are buttons: Add, Remove, Move up, and Move down.

Figure 2 - 31 Takeout Settings > Panel Options tab > Pickup tab

To configure settings for the Pickup tab:

1. Type the **number of seconds** after you stop typing characters in the search box that the system waits before automatically performing a search of customers that meet the search criteria, in 'Auto search timeout (seconds).' **Recommended:** 1 second.
2. Select **Enable quick detail** allow you to view item and payment information for an Aloha Takeout order in a popup window. You must press and hold down the order to display the window. Use this feature as an alternative to selecting an order and touching Order Details to view check content from the full-sized Check Details screen.
3. Select **Auto scroll order list to top** to display all orders at the top of the screen.
4. Select **Bypass filters on search** to allow you to search for an order and bypass any filter in effect at the time, essentially using the 'All' filter without switching to it first. This saves time in switching between filters and eliminates confusion when an order does not appear in a search result.
5. Select **Navigate to order details** to automatically navigate to and display an order in the Order Details screen when a search from the Pickup screen returns a single order that meets the criteria.
6. Click **Save**.

To add columns to the Pick Up screen:

Determine which **columns** appear on the Pick Up screen, and the order in which the columns appear, from left to right.

1. Click **Add**, select a column **type of column** from the drop-down list, and click **OK** to add the column to the active list.
2. Click **Move up** and **Move down** to organize the columns from left to right as they appear on the Pick Up screen.
3. Repeat **this procedure** for each column to appear on the Pick Up screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of columns.

To add actions to the Pick Up screen:

Select **actions** that best apply to your operational needs to appear on the right side of the Pick Up screen.

1. Click **Add**, select an **action** from the 'Type' drop-down list, and click **OK** to move the action to the active list.
2. Click **Move up** and **Move down** to organize the actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to appear on the Pick Up screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of actions.

To add sort selectors to the Pick Up screen:

Determine which **sorting methods** to use for orders on the Pick Up screen, and the order in which the columns appear, from left to right.

1. Click **Add**, select a **sort order** from the drop-down list, and click **OK**.
2. Click **Move up** and **Move down** to organize the columns from left to right as they appear on the Pick Up screen.
3. Repeat **this procedure** for each sort order on the Pick Up screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of sort selectors.

Panel Options: Dispatch tab

The options on the Dispatch tab apply only to the appearance and behavior of the Dispatch screen.

Takeout Settings

Takeout Settings: 1 Takeout Settings Coffee Bean Primary

Order Scheduling Barcode Scanners Panel Options Delivery Fees Phone Numbers Diagnostics Connected Payments Integration Configuration Custom Set < >

Panel Options

| | |
|--------------------------|-------------------------------------|
| Enable 2nd generation UI | <input checked="" type="checkbox"/> |
| Aloha tender screen | None |
| Default Aloha screen | None |

Lookup Pickup Dispatch Dispatch List Future Customer Selection Order Details Driver Info Bar All Orders Repeat Orders Map Dispatch New Futur < >

Settings

| | |
|------------------------------------|-------------------------------------|
| Enable multi-selection | <input type="checkbox"/> |
| Auto search timeout (seconds) | 1 |
| Alert box timeout | 5 |
| Enable auto-expansion | <input checked="" type="checkbox"/> |
| Auto-expand threshold (in minutes) | 60 |
| Sort drivers alphabetically | <input type="checkbox"/> |
| Enable quick detail | <input type="checkbox"/> |

Actions Filters

Actions

| | |
|---------------|--|
| Action name | |
| Notes | |
| Reprint Label | |
| Order Details | |
| Modify | |
| Print Check | |

Add Remove Move up Move down

Figure 2 - 32 Takeout Settings > Panel Options tab > Dispatch tab

To configure settings for the Dispatch screen:

1. Select **Enable multi-selection** to allow you to select more than one order at a time, and then to assign all selected orders to a specific driver. The current selected order appears with a green outline. As you select additional orders, previously selected orders appear with a yellow outline.

When you reach the 'Max orders per run' threshold, the selected order appears with a red outline, along with a message to indicate you have hit the threshold.



Figure 2 - 33 Dispatch screen, multi-select

2. Type the **number of seconds** after you stop typing characters in the search box that the system waits before automatically performing a search of orders that meet the search criteria, in 'Auto search timeout (seconds).' **Recommended:** 1 second.
3. Use the arrows or type the **number of seconds** an alert box remains visible before it closes, in 'Alert box timeout.' **Recommended:** 5 seconds.
4. Select **Enable auto-expansion** to allow the system to automatically expand segments within the 'Auto-expand threshold (in minutes)' when you access the Dispatch screen. Upcoming order segments appear in expanded segments for dispatch. Orders for later dispatch are hidden in collapsed segments. This reduces information overload and button touches to expand segments each time you access the Dispatch screen.
5. Type the **number of minutes** at which the system automatically expands segments when you access the Dispatch screen in 'Auto-expand threshold (in minutes).' **Recommended:** 60 minutes.
6. Select **Sort drivers alphabetically** to have the drivers appear by last name.
7. Select **Enable quick detail** to allow you to view item and payment information for an Aloha Takeout order in a popup window. You must press and hold down the order to display the window. Use this feature as an alternative to selecting an order and touching Order Details to view check content from the full-sized Check Details screen.
8. Select **Bypass filters on search** to allow you to search for an order and bypass any filter in effect at the time, essentially using the 'All' filter without switching to it first. This saves time in switching between filters and eliminates confusion when an order does not appear in a search result.
9. Click **Save**.

To add actions to the Dispatch screen:

Select the **actions** that best apply to your operational needs to appear on the right side of the Dispatch screen.

1. Click **Add**, select an **action** from the 'Type' drop-down list, and click **OK** to move the action to the active list.
2. Click **Move up** and **Move down** to organize actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to add to the Dispatch screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of actions.

To add filters to the Dispatch screen:

Select the **filters** for which you want to filter orders on the Dispatch screen.

1. Click **Add**, select a **filter** from the 'Type' drop-down list, and click **OK** to move the filter to the active list.
2. Click **Move up** and **Move down** to organize actions from top to bottom on the screen.
3. Repeat **this procedure** for each filter to add to the Dispatch screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of filters.

Panel Options: Dispatch List tab

The options on the Dispatch List tab apply only to the appearance and behavior of the Dispatch List screen.

Takeout Settings

Takeout Settings: 1 Takeout Settings Coffee Bean Primary

Order Scheduling Barcode Scanners Panel Options Delivery Fees Phone Numbers Diagnostics Connected Payments Integration Configuration Custom Set

Panel Options

| | |
|--------------------------|-------------------------------------|
| Enable 2nd generation UI | <input checked="" type="checkbox"/> |
| Aloha tender screen | None |
| Default Aloha screen | None |

Lookup Pickup Dispatch Dispatch List Future Customer Selection Order Details Driver Info Bar All Orders Repeat Orders Map Dispatch New Futur

Settings

| | |
|------------------------------------|-------------------------------------|
| Enable multi-selection | <input type="checkbox"/> |
| Auto search timeout (seconds) | 1 |
| Alert box timeout | 5 |
| Enable auto-expansion | <input checked="" type="checkbox"/> |
| Auto-expand threshold (in minutes) | 60 |
| Sort drivers alphabetically | <input type="checkbox"/> |
| Enable quick detail | <input type="checkbox"/> |

Actions Filters Sort Selectors

Actions

| | |
|---------------------|--|
| Action name | |
| Notes | |
| Reprint Label | |
| House Account | |
| House Account Group | |
| Order Details | |

Add Remove Move up Move down

Figure 2 - 34 Takeout Settings > Panel Options tab > Dispatch List tab

To configure settings for the Dispatch List screen:

1. Select **Enable multi-selection** to allow you to select more than one order at a time, and then to assign all selected orders to a specific driver. The current selected order appears with a green outline. As you select additional orders, previously selected orders appear with a yellow outline. When you reach the 'Max orders per run' threshold, the selected order appears with a red outline, along with a message to indicate you have hit the threshold.
2. Type the **number of seconds** after you stop typing characters in the search box that the system waits before automatically performing a search of orders that meet the search criteria, in 'Auto search timeout (seconds).' **Recommended:** 1 second.
3. Use the arrows or type the **number of seconds** an alert box remains visible before it closes, in 'Alert box timeout.' **Recommended:** 5 seconds.
4. Select **Enable auto-expansion** to allow the system to automatically expand segments within the 'Auto-expand threshold (in minutes)' when you access the Dispatch screen. Upcoming order segments appear in expanded segments for dispatch. Orders for later dispatch are hidden in collapsed segments. This reduces information overload and button touches to expand segments each time you access the Dispatch screen.

5. Type the **number of minutes** at which the system automatically expands segments when you access the Dispatch screen in 'Auto-expand threshold (in minutes).' **Recommended:** 60 minutes.
6. Select **Sort drivers alphabetically** to have the drivers appear by last name.
7. Select **Enable quick detail** to allow you to view item and payment information for an Aloha Takeout order in a popup window. You must press and hold down the order to display the window. Use this feature as an alternative to selecting an order and touching Order Details to view check content from the full-sized Check Details screen.
8. Select **Bypass filters on search** to allow you to search for an order and bypass any filter in effect at the time, essentially using the 'All' filter without switching to it first. This saves time in switching between filters and eliminates confusion when an order does not appear in a search result.
9. Click **Save**.

To add actions to the Dispatch List screen:

Select the **actions** that best apply to your operational needs to appear on the right side of the Dispatch List screen.

1. Click **Add**, select an **action** from the 'Type' drop-down list, and click **OK** to move the action to the active list.
2. Click **Move up** and **Move down** to organize actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to add to the Dispatch List screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of actions.

To add filters to the Dispatch List screen:

Select the **filters** for which you want to filter orders on the Dispatch List screen.

1. Click **Add**, select a **filter** from the 'Type' drop-down list, and click **OK** to move the filter to the active list.
2. Click **Move up** and **Move down** to organize actions from top to bottom on the screen.
3. Repeat **this procedure** for each filter to add to the Dispatch List screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of filters.

Panel Options: Future tab

The options on the Future tab apply only to the appearance and behavior of the Future Orders screen.

The screenshot displays the 'Takeout Settings' interface. At the top, a dropdown menu shows '1 Takeout Settings Coffee Bean Primary'. Below this is a navigation bar with tabs: 'Order Scheduling', 'Barcode Scanners', 'Panel Options', 'Delivery Fees', 'Phone Numbers', 'Diagnostics', 'Connected Payments Integration Configuration', and 'Custom Set'. The 'Panel Options' tab is selected. Under 'Panel Options', there are three rows: 'Enable 2nd generation UI' with a checked checkbox, 'Aloha tender screen' set to 'None', and 'Default Aloha screen' set to 'None'. Below this is another navigation bar with tabs: 'Lookup', 'Pickup', 'Dispatch', 'Dispatch List', 'Future', 'Customer Selection', 'Order Details', 'Driver', 'Info Bar', 'All Orders', 'Repeat Orders', 'Map Dispatch', and 'New Futur'. The 'Future' tab is selected. Under 'Future', there is a 'Settings' section with five rows: 'Enable multi-selection' (unchecked), 'Alert box timeout' (5), 'Customer view auto search timeout' (1), 'Month view number of weeks' (5), and 'Enable future auto expansion' (unchecked). Below the settings is a 'Customer View Columns' section with a list of columns: 'Column name', 'VIP Column', 'Customer Column', 'Address Column', 'Home Phone Column', 'Work Phone Column', and 'Cell Phone Column'. To the right of the list are buttons: 'Add', 'Remove', 'Move up', and 'Move down'.

Figure 2 - 35 Takeout Settings > Panel Options tab > Future tab

To configure settings for the Future Orders screen:

1. Select **Enable multi-selection** to allow you to select more than one order at a time to release. You can use this option to select all orders for breakfast, then touch 'Release Now' to release the selected orders. This helps with catering operations by manually sending orders to the kitchen in bulk.
2. Use the arrows or type the **number of seconds** an alert box remains visible before it closes, in 'Alert box timeout.' **Recommended:** 5 seconds.
3. Type the **number of seconds** after you stop typing characters in the search box that the system waits before automatically performing a search of orders that meet the search criteria, in 'Customer view auto search timeout (seconds).' **Recommended:** 1 second.
4. Use the arrows or type the **number of weeks** that appear on the Future Orders screen in 'Month view number of weeks.' **Recommended:** Select 5 (weeks) for 15" terminals or 3 (weeks) for 12"/800 x 600 terminals.
5. Select **Enable future auto expansion** to allow the system to automatically expand segments within the 'Future auto expand threshold (in minutes)' when you access the Future screen. Upcoming order segments appear in expanded segments for manual release. Orders for later

release are hidden in collapsed segments. This reduces information overload and button touches to expand segments each time you access the Future Orders screen.

6. Type the **number of minutes** the system automatically expands segments when you access the Dispatch screen in 'Future auto expand threshold (in minutes).' **Recommended:** 180 minutes (3 hours).
7. Select **Enable quick detail** to allow you to view item and payment information for an Aloha Takeout order in a popup window. You must press and hold down the order to display the window. Use this feature as an alternative to selecting an order and touching Order Details to view check content from the full-sized Check Details screen.
8. Click **Save**.

To add columns to the Future Orders screen:

Determine which **columns** appear on the Future Orders screen, and the order in which the columns appear, from left to right.

1. Click **Add**, select a **type of column** from the drop-down list, and click **OK** to add the column to the active list.
2. Click **Move up** and **Move down** to organize the columns from left to right as they appear on the Future Orders screen.
3. Repeat **this procedure** for each column to appear on the Future Orders screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for column definitions.

To add actions to the Future Orders screen:

Select the **actions** that best apply to your operational needs to appear on the right side of the Future Orders screen.

1. Click **Add**, select an **action** from the 'Type' drop-down list, and click **OK** to move the action to the active list.
2. Click **Move up** and **Move down** to organize actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to add to the Future Orders screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of actions.

Panel Options: Customer Selection tab

The options on the Customer Selection tab apply only to the appearance and behavior of the Customer Selection screen. The Customer Selection screen appears when using FLOW_ORDER_TO TAKEOUT and when scheduling a future order.

The screenshot shows the 'Takeout Settings' application window. At the top, there's a title bar 'Takeout Settings' and a dropdown menu showing '1 Takeout Settings Coffee Bean Primary'. Below this is a navigation bar with tabs: 'Order Scheduling', 'Barcode Scanners', 'Panel Options' (selected), 'Delivery Fees', 'Phone Numbers', 'Diagnostics', 'Connected Payments', 'Integration Configuration', and 'Custom Set'. The 'Panel Options' section contains three settings: 'Enable 2nd generation UI' (checked), 'Aloha tender screen' (set to 'None'), and 'Default Aloha screen' (set to 'None'). Below this is another navigation bar with tabs: 'Lookup', 'Pickup', 'Dispatch', 'Dispatch List', 'Future', 'Customer Selection' (selected), 'Order Details', 'Driver', 'Info Bar', 'All Orders', 'Repeat Orders', 'Map Dispatch', and 'New Futur'. The 'Customer Selection' sub-tab is active, showing a 'Settings' section with 'Auto search timeout' set to '1'. Below this is a 'Columns' section with a table of columns and their names, and buttons to 'Add', 'Remove', 'Move up', and 'Move down'.

| Column name | |
|-------------------|--|
| VIP Column | |
| Customer Column | |
| Address Column | |
| Home Phone Column | |
| Work Phone Column | |
| Cell Phone Column | |

Figure 2 - 36 Takeout Settings > Panel Options tab > Customer Selection tab

Type the **number of seconds** after you stop typing characters in the search box that the system waits before automatically performing a search of customers that meet the search criteria, in 'Auto search timeout.' **Recommended:** 1 second.

To add columns to the Customer Selection screen:

Determine which **columns** appear on the Customer Selection screen, and the order in which the columns appear, from left to right.

1. Click **Add**, select a column **type of column** from the drop-down list, and click **OK** to add the column to the active list.
2. Click **Move up** and **Move down** to organize the columns from left to right as they appear on the Customer Selection screen.

3. Repeat **this procedure** for each column to appear on the Customer Selection screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of columns.

To add actions to the Customer Selection screen:

Select **actions** that best apply to your operational needs to appear on the right side of the Customer Selection screen.

1. Click **Add**, select an **action** from the 'Type' drop-down, and click **OK** to move the action to the active list.
2. Click **Move up** and **Move down** to organize the actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to appear on the Customer Selection screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of actions.

Panel Options: Order Details tab

The options on the Order Details tab apply to the action buttons that appear on the Order Details screen. You can access the Order Details screen by selecting an order and touching 'Order Details' on the Pick Up, Dispatch, All Orders, and Future Orders screens.

The screenshot shows the 'Takeout Settings' application interface. At the top, there's a header 'Takeout Settings' and a dropdown menu showing '1 Takeout Settings Coffee Bean Primary'. Below this is a navigation bar with tabs: 'Order Scheduling', 'Barcode Scanners', 'Panel Options' (selected), 'Delivery Fees', 'Phone Numbers', 'Diagnostics', 'Connected Payments Integration Configuration', and 'Custom Set'. The 'Panel Options' section contains a table with three rows: 'Enable 2nd generation UI' with a checked checkbox, 'Aloha tender screen' with a value of 'None', and 'Default Aloha screen' with a value of 'None'. Below this is another navigation bar with tabs: 'Lookup', 'Pickup', 'Dispatch', 'Dispatch List', 'Future', 'Customer Selection', 'Order Details' (selected), 'Driver', 'Info Bar', 'All Orders', 'Repeat Orders', 'Map Dispatch', and 'New Futur'. The 'Order Details' tab is active, showing an 'Actions' section with a list of actions: 'Modify', 'Payment Group', 'Print Check', 'Print Future Order Statement', 'Print Chit', 'Print Invoice', 'Reprint Labels', 'Deposit', 'Pager', 'Notes', 'House Account', 'Cancel Order', and 'Edit Promise Time'. To the right of the list are buttons: 'Add', 'Remove', 'Move up', and 'Move down'.

Figure 2 - 37 Takeout Settings > Panel Options tab > Order Details tab

To add actions to the Order Details screen:

Select **actions** that best apply to your operational needs to appear on the right side of the Order Details screen.

1. Click **Add**, select an **action** from the 'Type' drop-down, and click **OK** to move the action to the active list.
2. Click **Move up** and **Move down** to organize the actions, from top to bottom on the screen.
3. Repeat **this procedure** for each action to appear on the Order Details screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of actions.

Panel Options: Driver tab

The options on the Driver tab apply to the action buttons that appear on the Driver screen.

The screenshot shows the 'Takeout Settings' application interface. At the top, there's a header bar with the title 'Takeout Settings' and a dropdown menu showing '1 Takeout Settings Coffee Bean Primary'. Below this is a navigation bar with tabs: 'Order Scheduling', 'Barcode Scanners', 'Panel Options', 'Delivery Fees', 'Phone Numbers', 'Diagnostics', 'Connected Payments Integration Configuration', and 'Custom Set'. The 'Panel Options' tab is selected. Under 'Panel Options', there are three settings: 'Enable 2nd generation UI' (checked), 'Aloha tender screen' (set to 'None'), and 'Default Aloha screen' (set to 'None'). Below this is another navigation bar with tabs: 'Lookup', 'Pickup', 'Dispatch', 'Dispatch List', 'Future', 'Customer Selection', 'Order Details', 'Driver', 'Info Bar', 'All Orders', 'Repeat Orders', 'Map Dispatch', and 'New Futur'. The 'Driver' tab is selected. Under 'Driver', there are two settings: 'Sort drivers alphabetically' (unchecked) and 'Enable quick detail' (unchecked). Below these settings is an 'Actions' section with a table of actions. The table has columns for 'Action name' and 'Add'. The actions listed are: 'Driver State Group', 'Refresh', 'Adjust Tips', 'Cash To Store', 'Cash To Driver', 'Pre-Checkout', 'Checkout', 'Modify', and 'Print Check'. To the right of the table are buttons for 'Add', 'Remove', 'Move up', and 'Move down'.

Figure 2 - 38 Takeout Settings > Panel Options tab > Driver tab

To configure settings for the Driver tab:

1. Select **Sort drivers automatically** to enable the system to automatically sort the drivers in the list alphabetically.
2. Select **Enable quick detail** allow you to view item and payment information for an Aloha Takeout order in a popup window. You must press and hold down the order to display the window. Use this feature as an alternative to selecting an order and touching Order Details to view check content from the full-sized Check Details screen.
3. Click **Save**.

To add actions to the Driver screen:

Select **actions** that best apply to your operational needs to appear on the right side of the Driver screen.

1. Click **Add**, select an **action** from the 'Type' drop-down, and click **OK** to move the action to the active list.
2. Click **Move up** and **Move down** to organize the actions from top to bottom on the screen.

3. Repeat **this procedure** for each action to appear on the Driver screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of actions.

Panel Options: Info Bar tab

The options on the Info Bar tab apply only to the appearance and behavior of the Dashboard Settings screen that appears when you touch 'Adjust Quote Time.' The settings on the Info Bar tab define which quote time elements appear and the incremental value to use for adjusting the quote time each time you touch '+' or '-' Select quote elements based on the order modes selected on the Order Modes tab. You can also configure the system to automatically reset the quote time metrics to default values at the end of day.

Takeout Settings

Takeout Settings: 1 Takeout Settings Coffee Bean Primary

Order Scheduling | Barcode Scanners | Panel Options | Delivery Fees | Phone Numbers | Diagnostics | Connected Payments Integration Configuration | Custom Set < >

Panel Options

| | |
|--------------------------|-------------------------------------|
| Enable 2nd generation UI | <input checked="" type="checkbox"/> |
| Aloha tender screen | None |
| Default Aloha screen | None |

Lookup | Pickup | Dispatch | Dispatch List | Future | Customer Selection | Order Details | Driver | Info Bar | All Orders | Repeat Orders | Map Dispatch | New Futur < >

Settings

| | |
|--|---|
| Enable 'Stop accepting online orders' button | Disabled |
| Catering online orders state | Accept Catering online orders and reset at end of day |
| Curbside online orders state | Accept Curbside online orders and reset at end of day |
| Delivery online orders state | Accept Delivery online orders and reset at end of day |
| Drive Thru online orders state | Accept Drive Thru online orders and reset at end of day |
| Pickup online orders state | Accept Pickup online orders and reset at end of day |

Quote times | Elements | Metrics

Adjust Quote Settings

| Type | Increment | Minimum | Maximum |
|----------|-----------|---------|---------|
| Call In | 5 | 0 | 0 |
| Walk In | 5 | 0 | 0 |
| Delivery | 5 | 0 | 0 |
| Web | 5 | 0 | 0 |
| Catering | 5 | 0 | 0 |

Figure 2 - 39 Takeout Settings > Panel Options tab > Info Bar tab

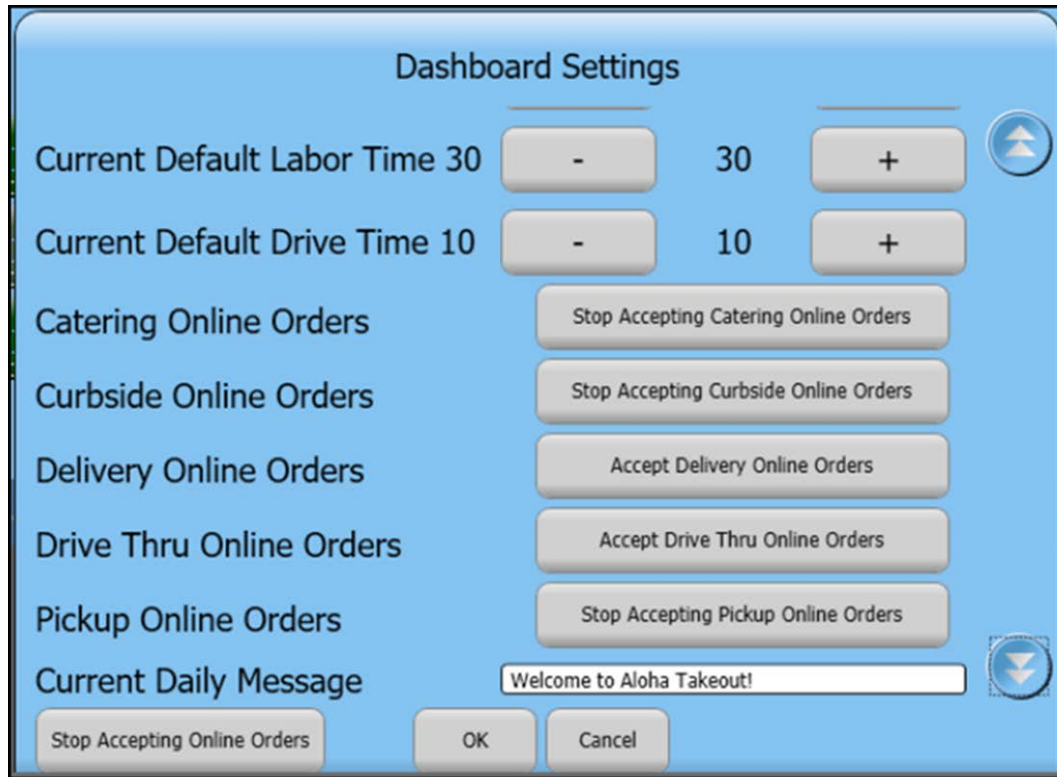


Figure 2 - 40 FOH Dashboard Settings Screen

To configure the Info Bar tab:

Select from the **Enable Stop accepting online orders button** drop-down list to control whether a store can stop accepting online orders temporarily until EOD, or semi-permanently until specifically started again by the manager. The selections are 'Disabled,' 'Stop accepting online orders and reset at end-of-day, and Stop accepting online orders and do not reset at end of day.

Group Bar: Adjust Quote Setting

Various quote times may require more fine tuning than others. Call-in quotes depend on kitchen resources, yet delivery quotes depend on kitchen and driver resources, and traffic. The Adjust Quote Setting group bar allows you to define quote time increments differently by order type. This allows you to quickly increase or decrease the quote time as business dictates.

- Define the **Call In Quote Increment** in minutes to increment or decrement the call-in quote time when you touch the up and down arrows on the Adjust Quote screen. **Recommended Configuration:** 5 minutes.
- Define the **Walk In Quote Increment** in minutes to increment or decrement the walk-in quote time when you touch the up and down arrows on the Adjust Quote screen. **Recommended Configuration:** 1 minute.

- Define the **Delivery Quote Increment** in minutes to increment or decrement the delivery quote time when you touch the up and down arrows on the Adjust Quote screen. **Recommended Configuration:** 15 minutes.
- Define the **Web Quote Increment** in minutes to increment or decrement the web quote time when you touch the up and down arrows on the Adjust Quote screen. **Recommended Configuration:** Optional, depending on whether web orders are for pick-up or delivery.
- Define the **Catering Quote Increment** in minutes to increment or decrement the catering quote time when you touch the up and down arrows on the Adjust Quote screen. **Recommended Configuration:** 30 minutes.
- Define the **Prep Time Increment** in minutes to increment or decrement the prep time when you touch the up and down arrows on the Adjust Quote screen. **Recommended Configuration:** 1 minute.
- Define the **Labor Time Increment** in minutes to increment or decrement the labor time when you touch the up and down arrows on the Adjust Quote screen. **Recommended Configuration:** 30 minutes.
- Define the **Adjust Drive Time Increment** in minutes to increment or decrement the default drive time when you touch the up and down arrows on the Adjust Quote Screen. **Recommended Configuration:** 5 minutes.

Group Bar: Elements

The Elements group bar enables you to specify the quote time elements that appear on the Adjust Quote screen. **Recommended Configuration:** Make selections based on the order modes defined on the Maintenance > Aloha Takeout Settings> Order Modes tab.

Group Bar: Metrics

The Metrics group bar enables you to specify the Quote time elements you want reset at the end of day to default values you configure.

The screenshot displays the 'Takeout Settings' window for '1 Takeout Settings Coffee Bean Primary'. The 'Panel Options' tab is active, showing settings for 'Enable 2nd generation UI' (checked), 'Aloha tender screen' (None), and 'Default Aloha screen' (None). Below this, the 'Settings' tab is active, showing various online order states. At the bottom, the 'Metrics' tab is selected, showing a table with columns for 'Metric name' and 'Reset at EOD value (in minutes)'. An 'Add' button with a dropdown arrow and a 'Remove' button are visible on the right side of the Metrics table.

Figure 2 - 41 Takeout Settings > Panel Options tab > Info Bar tab > Metrics tab

To configure Quote times to reset at the EOD:

1. Under the 'Metrics' group bar, click the **Add** drop-down arrow, select a **specific quote time metric** as the metric type, and click **OK**.
2. Click to the right of the metric name, under 'Reset at EOD value (in minutes),' and type the **number of minutes** to use as your default quote time.
3. Repeat **this procedure** for each quote time you wish to reset during the end of day.
4. Click **Save**

Panel Options: All Orders tab

The All Orders screen allows the management of pick-up orders, however, you can only assign and dispatch delivery orders from the Dispatch screen.

The screenshot displays the 'Takeout Settings' application interface. At the top, there's a header bar with the title 'Takeout Settings' and a dropdown menu showing '1 Takeout Settings Coffee Bean Primary'. Below this is a navigation bar with tabs: 'Order Scheduling', 'Barcode Scanners', 'Panel Options' (selected), 'Delivery Fees', 'Phone Numbers', 'Diagnostics', 'Connected Payments', 'Integration Configuration', and 'Custom Set'. The 'Panel Options' section contains three rows: 'Enable 2nd generation UI' with a checked checkbox, 'Aloha tender screen' set to 'None', and 'Default Aloha screen' set to 'None'. Below this is another navigation bar with tabs: 'Lookup', 'Pickup', 'Dispatch', 'Dispatch List', 'Future', 'Customer Selection', 'Order Details', 'Driver', 'Info Bar', 'All Orders' (selected), 'Repeat Orders', 'Map Dispatch', and 'New Futur'. The 'All Orders' sub-tab shows a 'Settings' section with four rows: 'Auto search timeout (seconds)' set to '1', 'Enable quick detail' with an unchecked checkbox, 'Auto scroll order list to top' with an unchecked checkbox, and 'Bypass filters on search' with an unchecked checkbox. At the bottom, there's a 'Columns' section with a table listing columns: 'Column name', 'VIP Column', 'Orders Column', 'Customer Column', 'Address Column', 'Contact Phone Column', 'Order Status Column', and 'Total Column'. To the right of the table are buttons: 'Add', 'Remove', 'Move up', and 'Move down'.

Figure 2 - 42 Takeout Settings > Panel Options tab > All Orders tab

To configure the All Orders tab:

1. Type the **number of seconds** after you stop typing characters in the search box that the system waits before automatically performing a search of orders that meet the search criteria, in 'Auto search timeout (seconds).' **Recommended:** 1 second.
2. Select **Enable quick detail** to allow you to view item and payment information for an Aloha Takeout order in a popup window. You must press and hold down the order to display the window. Use this feature as an alternative to selecting an order and touching Order Details to view check content from the full-sized Check Details screen.
3. Select **Auto scroll order list to top** to display all orders at the top of the screen.
4. Select **Bypass filters on search** to allow you to search for an order and bypass any filter in effect at the time, essentially using the 'All' filter without switching to it first. This saves time in switching between filters and eliminates confusion when an order does not appear in a search result.
5. Select **Navigate to order details** to automatically navigate to and display an order in the Order Details screen when a search from the Pickup screen returns a single order that meets the criteria.
6. Click **Save**.

To add columns to the All Orders screen:

Determine which **columns** appear on the All Orders screen, and the order in which the columns appear, from left to right.

1. Click **Add**, select a column **type of column** from the drop-down list, and click **OK** to add the column to the active list.
2. Click **Move up** and **Move down** to organize the columns from left to right as they appear on the All Orders screen.
3. Repeat **this procedure** for each column to appear on the All Orders screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for column definitions.

To add actions to the All Orders screen:

Select **actions** that best apply to your operational needs to appear on the All Order screen.

1. Click **Add**, select an **action** from the 'Type' drop-down, and click **OK** to move the action to the active list.
2. Click **Move up** and **Move down** to organize the actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to appear on the All Order screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of actions.

To add sort selectors to the All Orders screen:

Determine which **sort order** to use for orders on the All Orders screen, and the order in which the columns appear, from left to right.

1. Click **Add**, select a **sort order** from the drop-down list, and click **OK**.
2. Click **Move up** and **Move down** to organize the columns from left to right as they appear on the Pick Up screen.
3. Repeat **this procedure** for each sort order on the All Orders screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of sort selectors.

Panel Options: Repeat Orders tab

The Repeat Orders option allows you to view a customer's previous orders in order to repeat a past order. You can also highlight a selected customer's order as a favorite.

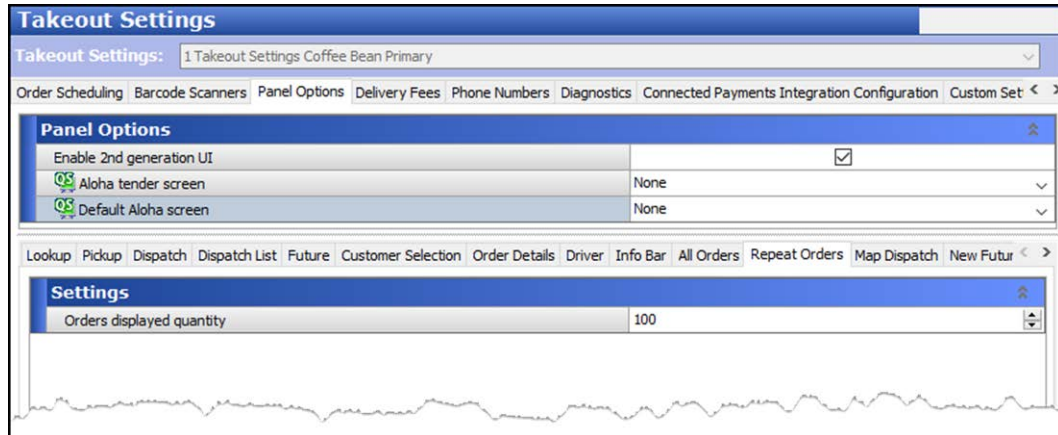


Figure 2 - 43 Takeout Settings > Panel Options tab > Repeat Orders tab

Repeat Orders, under the Settings group bar, is automatically enabled. The only necessary configuration is identify the **number** of previous orders to display. Under the Settings group bar of the Repeat Orders tab, select the **number of previous orders** to display in **Orders displayed quantity**.

Panel Options: Map Dispatch tab

The screenshot shows the 'Takeout Settings' application. At the top, there's a 'Takeout Settings' header with a dropdown menu showing '1 Takeout Settings Coffee Bean Primary'. Below this is a navigation bar with tabs: 'Order Scheduling', 'Barcode Scanners', 'Panel Options', 'Delivery Fees', 'Phone Numbers', 'Diagnostics', 'Connected Payments Integration Configuration', and 'Custom Set'. The 'Panel Options' tab is selected. Under 'Panel Options', there are three settings: 'Enable 2nd generation UI' (checked), 'Aloha tender screen' (set to 'None'), and 'Default Aloha screen' (set to 'None'). Below this is another navigation bar with tabs: 'Lookup', 'Pickup', 'Dispatch', 'Dispatch List', 'Future', 'Customer Selection', 'Order Details', 'Driver', 'Info Bar', 'All Orders', 'Repeat Orders', 'Map Dispatch', and 'New Futur'. The 'Map Dispatch' tab is selected. Under 'Map Dispatch', there are two sections: 'Settings' and 'Actions'. The 'Settings' section has three options: 'Enable multi selection' (unchecked), 'Sort drivers alphabetically' (unchecked), and 'Enable quick detail' (unchecked). The 'Actions' section has a list of actions: 'Action name', 'Driver Orders', 'Notes', 'Reprint Label', 'Order Details', 'Modify', 'Print Check', 'Payment Group', 'Edit Deposit', and 'Get Route'. To the right of the 'Actions' list are buttons: 'Add', 'Remove', 'Move up', and 'Move down'.

Figure 2 - 44 Takeout Settings > Panel Options tab > Map Dispatch tab

The options on the Map tab apply to the action buttons that appear on the Map screen.

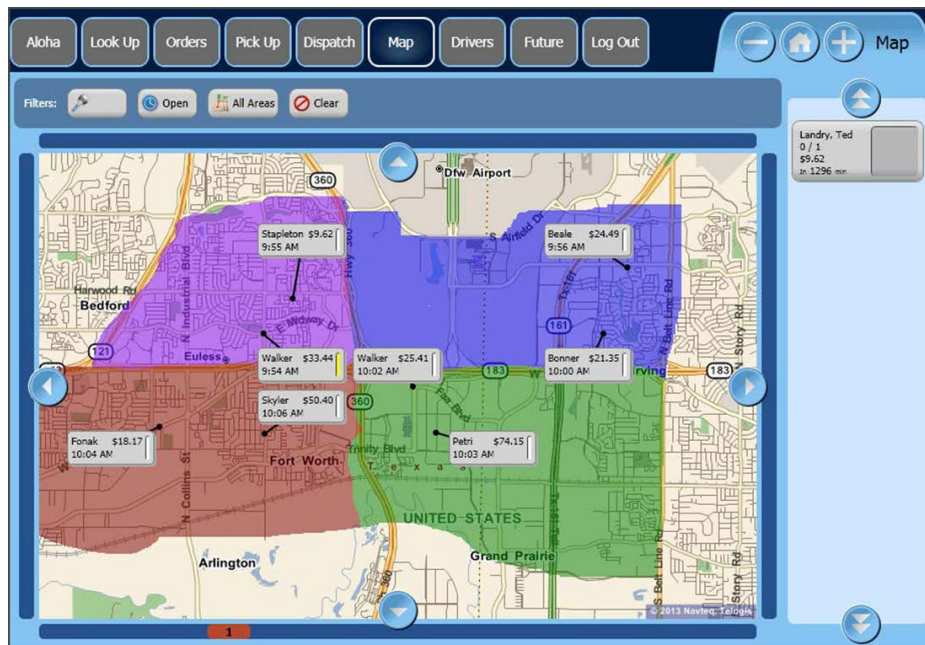


Figure 2 - 45 Map screen

To configure settings on the Map Dispatch tab:

1. Select **Enable multi-selection** to allow you to select more than one order at a time, and then to assign all selected orders to a specific driver. The current selected order appears with a green outline. As you select additional orders, previously selected orders appear with a yellow outline. When you reach the 'Max orders per run' threshold, the selected order appears with a red outline, along with a message to indicate you have hit the threshold.



Reference

Refer to the [Delivery Area Feature Focus Guide - HKS351](#) for detailed information on the configuration and use of the Map screen.

2. Select **Sort drivers alphabetically** to have the drivers appear by last name.
3. Select **Enable quick detail** to allow you to view item and payment information for an Aloha Takeout order in a popup window. You must press and hold down the order to display the window. Use this feature as an alternative to selecting an order and touching Order Details to view check content from the full-sized Check Details screen.
4. Click **Save**.

To add actions to the Map screen:

Select the **actions** that best apply to your operational needs to appear on the right side of the Map screen.

1. Click **Add**, select an **action** from the 'Type' drop-down list, and click **OK** to move the action to the active list.
2. Click **Move up** and **Move down** to organize actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to add to the Map screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of actions.

Panel Options: New Future Order tab

You can define the order modes available on the Delayed Order Information (Future Orders) screen. Previously, you had to define the order modes using the FutureOrderModeButtons.xml file.

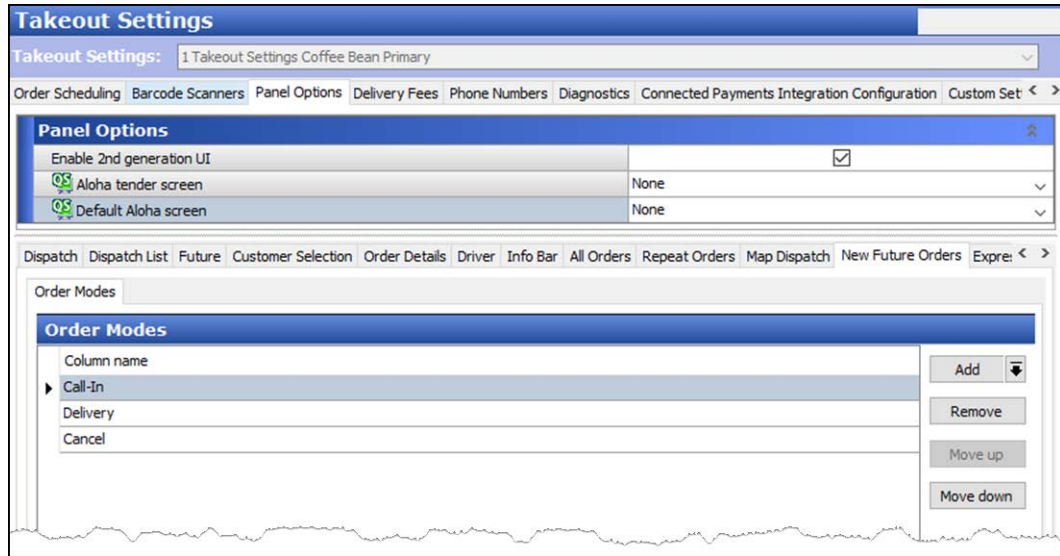


Figure 2 - 46 Takeout Settings > Panel Options tab - New Future Orders tab

To add order modes to the Delayed Order Information screen:

1. Click **Add**, select an **order mode** from the 'Type' drop-down list, and click **OK**.
2. Click **Move up** and **Move down** to organize actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to add to the Delayed Order Information screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of order modes.

Panel Options: Express Entry tab

You can speed up your order entry process by starting a future order from the express entry screen by starting a future order from the express entry screen when you enter the guest information. Otherwise, you must start a future order from the Lookup screen in the FOH.

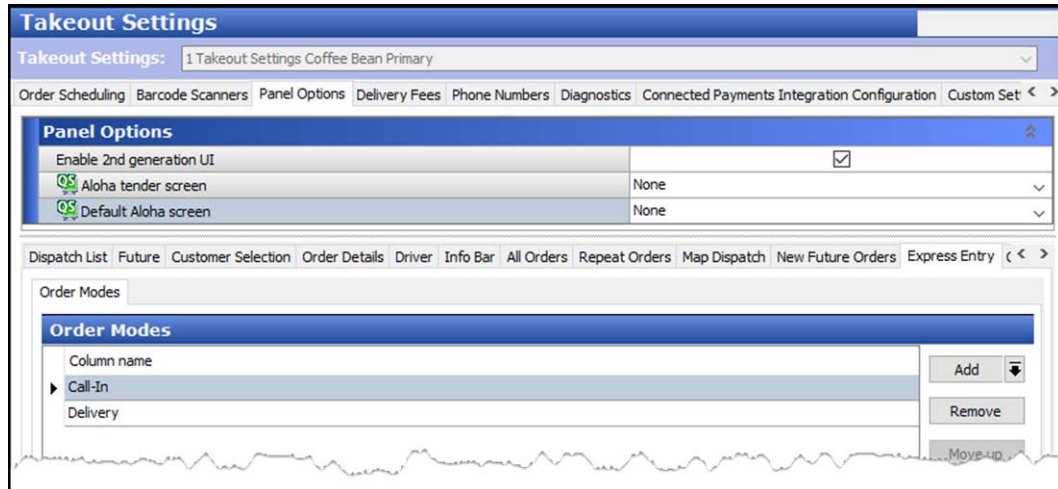


Figure 2 - 47 Takeout Settings > Panel Options tab > Express Entry tab

To add order modes to the Express Entry screen:

1. Click **Add**, select an **order mode** from the 'Type' drop-down list, and click **OK**.
2. Click **Move up** and **Move down** to organize actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to add to the Express Entry screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of order modes.

Panel Options: Change Order Modes tab

You can easily change the initial order mode applied to an order from the Order Confirmation screen or by using the Change Order button. You must define the order modes to make available on the Change Order Mode screen.

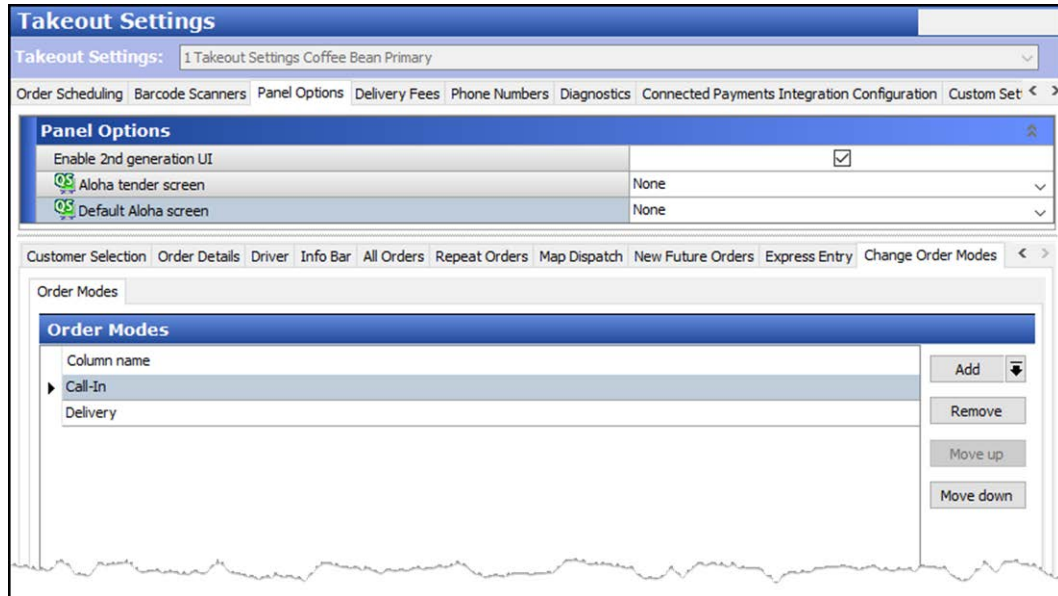


Figure 2 - 48 Takeout Settings > Panel Options tab > Change Order Modes tab

To add order modes to the Change Order Mode screen:

1. Click **Add**, select an **order mode** from the 'Type' drop-down list, and click **OK**.
2. Click **Move up** and **Move down** to organize actions from top to bottom on the screen.
3. Repeat **this procedure** for each action to add to the Change Order Mode screen.
4. Click **Save**.



Reference

Refer to the [Aloha Takeout Reference Guide - HKS1661](#) for definitions of order modes.

Configuring setup times

Some operations require time outside of cooking and delivering food to set up for an event, such as for a catering event. You can add a setup time metric to your operations to allow you to track the time it takes to set up an order at a site or location. You enable a setup time by order mode. For example, if the promise time for a catering order is set for 12:00 p.m., but the employees should really be at the location at 11:15 a.m. (45 minutes early) to set up burners, cutlery, place settings, and more, you can establish and track setup times for your catering order mode to increase the effectiveness of your catering team. The setup time allows you to increase the effectiveness of your catering team, or any other environment that requires time to set up.

The screenshot shows a 'Dashboard Settings' window with a list of settings. Each setting has a label, a minus button, a value field, and a plus button. The settings are:

| Setting | Minus | Value | Plus |
|------------------------------|-------|-------|------|
| Current Pick Up Quote 20 | - | 20 | + |
| Current Walk In Quote 0 | - | 0 | + |
| Current Delivery Quote 45 | - | 45 | + |
| Current Catering Quote 60 | - | 60 | + |
| Current Web Quote 15 | - | 15 | + |
| Current Default Prep Time 10 | - | 10 | + |
| Current Default Setup Time 6 | - | 6 | + |

At the bottom are 'OK' and 'Cancel' buttons. The row for 'Current Default Setup Time 6' is circled in red.

Figure 2 - 49 Dashboard Settings screen with default setup times

To configure an order mode to track setup time:

1. Select **Maintenance > Takeout > Takeout Settings > Order Modes** tab.
2. Under the 'Order Modes' group bar, click the **Add** drop-down arrow, select an **order mode** such as Catering, and click **OK**.
3. Under the 'Settings' group bar, select **Track setup time**.
4. Click **Save** and continue to the next **procedure**.

To add the Default Setup Time element to the FOH Dashboard Settings screen:

1. Select **Maintenance > Takeout Configuration > Takeout Settings**.
2. Select the **Panel Options > Info Bar** tab.
3. Under the 'Adjust Quote Settings' group bar, select the **number of minutes to increment or decrement** the setup time each time you touch (+) or (-) on the Dashboard Settings screen.
4. Select the **Elements** tab.

5. Under the 'Elements' group bar, click the **Add** drop-down arrow, select **Default Setup Time**, and click **OK**.
6. Click **Save** and continue to the next **procedure**.

To add the Setup Time button to an ATO screen:

1. From the Panel Options tab, select a tab that corresponds to an ATO screen on which you want the Setup Time button to appear, either the **Pickup, Dispatch, Future, Order Details, All Orders**, or **Map Dispatch** tab.
2. Select the **Actions** tab.
3. Under the 'Actions' group bar, click the **Add** drop-down arrow, select **Edit Setup Time**, and click **OK**.
4. Click **Move up** and **Move down** to rearrange the order in which the action buttons appear on the selected screen.
5. Click **Save**.
6. Repeat this **procedure** for each screen on which you want the Setup Time button to appear.
7. Exit the **Takeout Settings** function.

Enabling delivery fees in Aloha Takeout

The options available on the Delivery Fees tab enable and support the Delivery Fees feature. Use these options to select and configure fees you want to add to delivery orders, based on several different criteria. You can “stack” multiple delivery fee calculations to meet operational needs. For example, if you charge \$1.50 per delivery, plus .10 cents per mile, enable both the ‘Flat Amount’ and the ‘Distance From Store’ options.



Tip

Delivery fees calculate only on ATO orders using the Delivery order mode.

Use delivery fees to offset operational costs associated with delivery orders. These include packaging, utilities, and driver fees. The system recognizes delivery fees as store revenue, which reflects in the ‘Order Mode Charges’ section of the sales report, when configured. The system limits driver fee calculations to the amount of the delivery fee; therefore, we recommend you configure delivery fees to exceed the driver fee calculated amount for all orders.

When you enable delivery fees, Aloha Takeout calculates the fees based on the configured options. The system uses Aloha Connect to pass the delivery fee to the Aloha POS system. Changes to the check total or customer address information may impact the delivery fee. Aloha Takeout recalculates and updates the POS when you edit and finalize the check.

An employee assigned an access level with 'Can adjust order mode charges' enabled can adjust delivery fees.

- Touching 'Edit Guest' from any ATO screen allows authorized employees to override the system calculated delivery fee and set the delivery fee for a specific customer.
- Touching 'Delivery Fee' on the Order Details screen allows authorized employees to override the Aloha Takeout calculated value for a selected order.

The screenshot displays the 'Takeout Settings' application with the 'Delivery Fees' tab selected. The settings are organized into several sections:

- Settings:** Includes a checkbox for 'Enable delivery fees' which is checked.
- Delivery fees by order mode:** A dropdown menu for 'Order mode' is set to 'Delivery'.
- Minimum charge:** Includes a checkbox for 'Enable minimum delivery fee' which is unchecked.
- Maximum charge:** Includes a checkbox for 'Enable maximum delivery fee' which is unchecked.
- Check percentage:** Includes a checkbox for 'Enabled' which is unchecked.
- Flat amount:** Includes a checkbox for 'Enabled' which is checked, and a text field for 'Flat amount' set to '0.50'.
- Distance from store:** Includes a checkbox for 'Enabled' which is checked, a text field for 'Distance from store (based on mapping)' set to '0.10', and a radio button selection for 'Distance unit' with 'Mile' selected and 'Kilometer' unselected.
- Delivery zone:** Includes a checkbox for 'Enabled' which is unchecked.
- Day Parts:** Includes a checkbox for 'Enabled' which is unchecked.

Figure 2 - 50 Takeout Settings > Delivery Fees tab



Tip

Aloha Takeout delivery fees require POS version 6.7 or later, to pass information through Aloha Connect.

If using delivery fees with a prior POS version, configure delivery fees in Maintenance > System > Order Modes > Order Mode Info tab. We recommend selecting 'Order Items Prior to Confirmation (Order Summary Screen)' for the POS to calculate the order mode charge upon order, prior to Aloha Takeout displaying the confirmation screen.

To configure delivery fees:

- Select **Enable delivery fees** to activate the delivery fee feature. Other delivery fee options appear. Select one or more of the following delivery fees based on your operational needs.
- Select the **order mode** to which to apply delivery fees from the 'Order mode' drop-down list.
- Select **Enable minimum delivery fee** to cover standard operational costs associated with delivery. This feature works with variable mileage-based delivery fees, such as check percentage and distance from store, or when you stack a variable fee as part of a delivery fee calculation.
- Type the **Minimum delivery fee amount (in dollars)** for ATO to override, if the calculated delivery fee is below this amount.

- Select **Enable maximum delivery fee** to define the maximum delivery fee amount to charge a customer. This feature works with variable mileage-based delivery fees, such as check percentage and distance from store, or when you stack fees as part of a delivery fee calculation.
- Type the **Maximum delivery fee amount (in dollars)** for ATO to override, if the calculated delivery fee is above this amount.
- Under the 'Check percentage' group bar, select **Enabled** to have the system calculate the delivery fee as a percentage of the subtotal of each delivery check.
- Type the **percentage** in 'Check percentage.'
- Under the 'Flat amount' group bar, select **Enabled** to have the system add an amount to each delivery order, then type an **amount** in 'Flat amount.'
- Under the 'Distance from store' group bar, select **Enabled** to have the system calculate the delivery fee based on the distance between the store and the delivery address, then type the **amount** per distance unit in 'Distance from store (based on mapping).'

If you use mapping, the system uses the amount multiplied by the distance from the store to a delivery address.

If you do not use mapping, you must enter an amount in 'Distance' within Delivery Area, Zone, Neighborhood, or Street functions, for the system to calculate the delivery fee.

Select **Mile** or **Kilometer** in 'Distance unit.'



Reference

Refer to the [Delivery Area Feature Focus Guide - HKS351](#) for more information on configuring and using delivery areas.

- Under the 'Delivery zone' group bar, select **Enabled** to have the system use the 'Delivery fee' defined in Maintenance > Takeout Configuration > Delivery Areas > Zone for each zone. Type an **amount** in 'Delivery zone default fee' that the system uses when a zone does not have a 'Delivery fee' defined.
- Under the 'Day Parts' group bar, select **Enabled** to have the system use the delivery fee associated with the active day part. Click the **arrows** to move selected **day parts**, defined in the POS, from the Available frame to the Included frame. Type an **amount** for each day part.

Configuring phone number formats

Aloha Takeout allows easy configuration of U.S. phone number formats, as well as the ability to define phone formats for other areas of the globe. The 'Default Phone Type' and 'Require Phone Number For Customers' settings are moved to a new tab in Maintenance > Takeout Configuration > Takeout Settings named 'Phone Numbers.'

U.S. Aloha Takeout installations in less populated regions can benefit from the 'Default Area Code' functionality. For towns that typically have one area code for both land and mobile numbers, this can reduce the phone entry to seven digits. Installations with a larger customer base may turn this off to enter full 10-digit phone numbers with varying area codes.

Non-U.S. installations can benefit from varying phone number layouts. This allows sites to configure varying area code and local number digits. Sites can also define multiple unique phone formats, if there are local and regional variances to the type of phone numbers a customer may use.

Defining how Aloha Takeout searches phone numbers

To further streamline the ATO user experience, we provide the 'Primary format' attribute to help assist ATO in displaying a phone number as it is typed into the guest search bar on the Look Up screen. For example, when you type "0201234567", (020) 123-4567 appears in the search text window. If you wish to search for a number by its local part only or for a number with a different length area code, the procedure is no different. When you type a numeric string, such as "12345", the database searches for local numbers that begin with 12345, as well as all numbers where area code + phone number begins with (123) 45.

Takeout Settings

Takeout Settings: 1 Takeout Settings

Barcode Scanners | Panel Options | Delivery Fees | **Phone Numbers** | Diagnostics | Custom Settings

Settings

| | |
|--|-------------------------------------|
| Default phone type | Home |
| Require phone number | <input checked="" type="checkbox"/> |
| Number phone digits | 10 |
| Minimum extension digits | 4 |
| Maximum extension digits | 4 |
| Require extension for guest office phone numbers | <input checked="" type="checkbox"/> |
| Default area code | |
| Pre-populate default area code | <input type="checkbox"/> |
| Hide area code if equal to default | <input type="checkbox"/> |
| Use default U.S. phone format | <input checked="" type="checkbox"/> |

Phone Number Layouts

| Name | Area code... | Layout base | Enabled | Primary fo... | Preview |
|--------------|--------------|-------------|-------------------------------------|-------------------------------------|--------------|
| US - Stan... | (AAA) | LLL-LLLL | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | (123) 123... |

Add
Remove

Figure 2 - 51 Takeout Settings > Phone Numbers tab

Configuring phone formats for U.S. operations

1. Select the **phone type** that applies to the majority of customers that call your site for orders from the 'Default phone type' drop-down list. For example, if the site is located in a residential area, set the default phone type to "Home." Every new customer record defaults to this phone type; however the system allows you to manually change the type.
2. Select **Require phone number** to force you to enter a phone number when adding a new customer to the database. The system validates the phone number based on the phone format, to require the correct number of digits. **Recommended:** Selected.
3. Type the **number of phone digits** for telephone numbers in your area in 'Number phone digits.' Once you have entered the required number of digits in the search bar and ATO does not find a match, the Express Guest Entry screen appears to allow the entry of additional guest information. You must select **Enable Express Customer Entry** for this feature.
4. Type the **minimum number of digits** you allow for a phone extension. The default is four.
5. Type the **maximum number of digits** you allow for a phone extension. The default is four.
6. Select **Require extension for guest office phone numbers** to force you to enter an extension when the phone type is 'Office.' If an extension is not entered and you attempt to save the customer record, a prompt for an extension appears. If the customer does not have an extension, you can type "no" in the extension to continue. **Recommended:** Clear this option unless your customers tend to have extensions.
7. Optionally, enter a **default area code** for smaller communities with a single area code. With the rapid adoption of mobile phones, this option may not be practical except in small communities.
 - a. Select **Pre-populate default area code** in small communities where the majority of your customers have a single area code for home, office, and mobile numbers. When enabled, the system uses the area code digits entered in 'Default Area Code' to pre-populate the area code. This saves screen touches by only entering the local number.



The image shows a text input field labeled "Home Phone:". Inside the field, the area code "(555)" is pre-populated in a smaller font, followed by a vertical separator and seven empty boxes for the local number: "□□□□ □□□□".

Figure 2 - 52 Pre-Populate Default Area Code

- b. Select **Hide area code if equal to default** to reduce excess screen information and simplify phone numbers. When enabled, if the area code of a customer phone number matches the default, the area code does not appear on various ATO screens including the Lookup, Pick Up, and Order Details screens. Only the seven-digit local number appears.
8. Select **Use default U.S. phone format** to force the (AAA) LLL-LLLL format, where AAA=area code and LLL-LLLL= the local number (exchange – extension). When selected, the 'Phone Number Layouts' frame is disabled. This helps simplify and minimize configuration for U.S. installations. **Recommended:** Selected for U.S. installations; cleared for non-U.S. installations.
 9. Clear **Area code must start with** for U.S. installations.

Refreshing 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 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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Aloha Takeout v20.1, Implementation 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:
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