

Feature Focus Guide: Bag Manifests

Core Product: Aloha Takeout
Last Updated: December 19, 2023

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Revision Record

Date	Version #	Description
Prior to 12/06/22	ATO v13.1+	Introduced the Bag Manifests feature.
	ATO v14.1+	Added support for the following: Print the header below the checklist on the bag manifest chit. The ability to include the item and order sundries as a subsection on Future Order report.
	ATO 15.2+	Aloha Takeout now prints manifest items and modifiers based on the priority configured in Item Routing Maintenance in the POS, as opposed to the order in which you enter them.
06/04/22		Converted document to use new templates.
12/06/22		Replaced front cover and back page to reflect new NCR branding.
12/19/2023		Updated document to reflect NCR Voyix branding.

About Bag Manifests

Bag Manifests at a Glance	
Core Product	Aloha[®] Quick Service, Aloha[®] Table Service
Complementary Products	Aloha Takeout
Separate License Required?	An 'Aloha Takeout and Delivery' license is required. Note: An Aloha Takeout and Delivery Mapping' license is not required for delivery functionality.
Other References	Aloha Takeout Reference Guide

Using the Bag Manifests feature available in Aloha[®] Takeout, 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.

Using the Bag Manifests feature, you can:

- Determine for which order modes you want to print bag manifests.
- Print an Item Checklist bag manifest, Order Checklist bag manifest, or both, based on where you want a bag manifest to print. For example, you may want to print an Item Checklist, which prints one item per manifest, to your production area, and print an Order Checklist, which prints all items for an order, to the expediter station where your staff is bagging the order.
- Choose whether to automatically print a bag manifest, or manually initiate the printing of a bag manifest.
- Determine the information you want to print on each type of bag manifest, based on how and where you prepare and bag your orders. For example, you may not want customer and sundry information to print on an Item Checklist, but you want that information to appear on an Order Checklist. Each bag manifest contains three sections. The customer information prints at the top by default, item and/or order information prints in the middle, and sundry information prints at the bottom.

Examples of Order Checklist Bag Manifests:

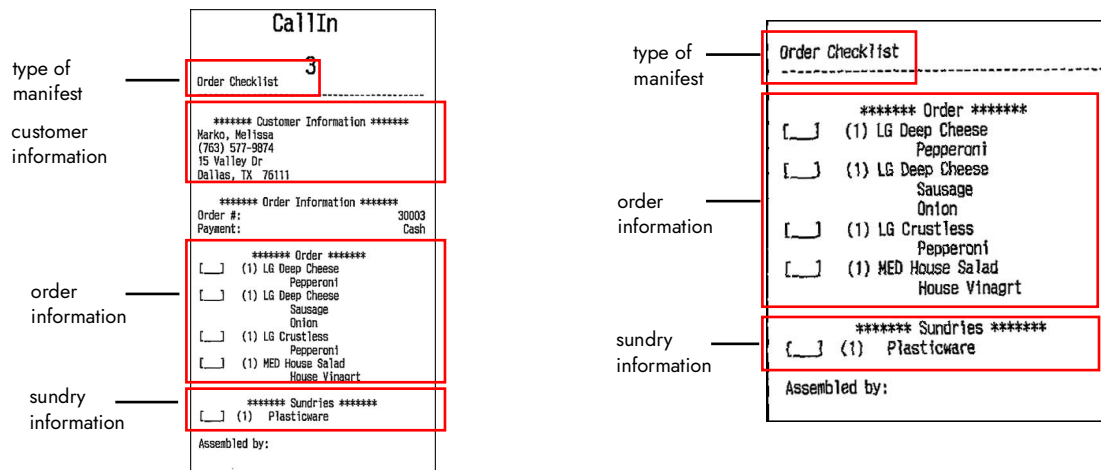


Figure 1 Order Checklist Bag Manifests

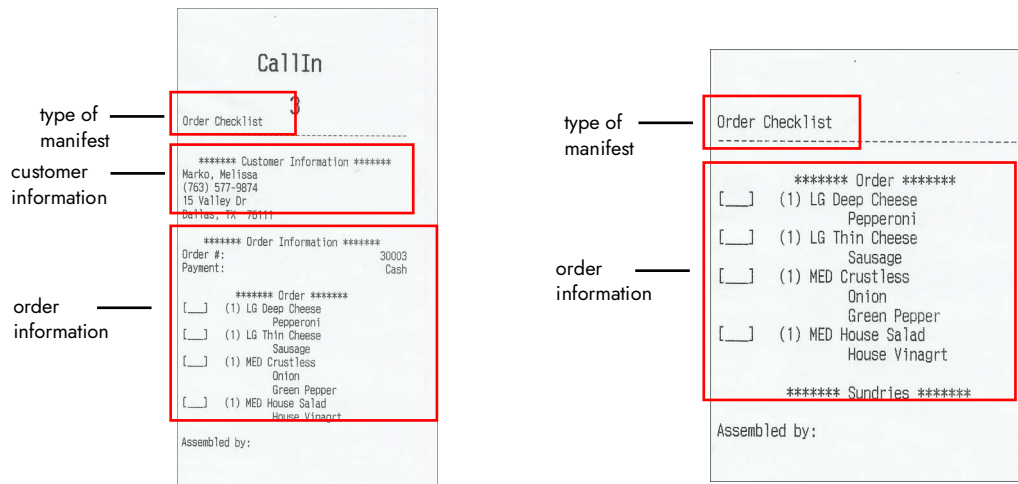


Figure 2 Order Checklist Bag Manifests

Examples of Item Checklist Bag Manifests:

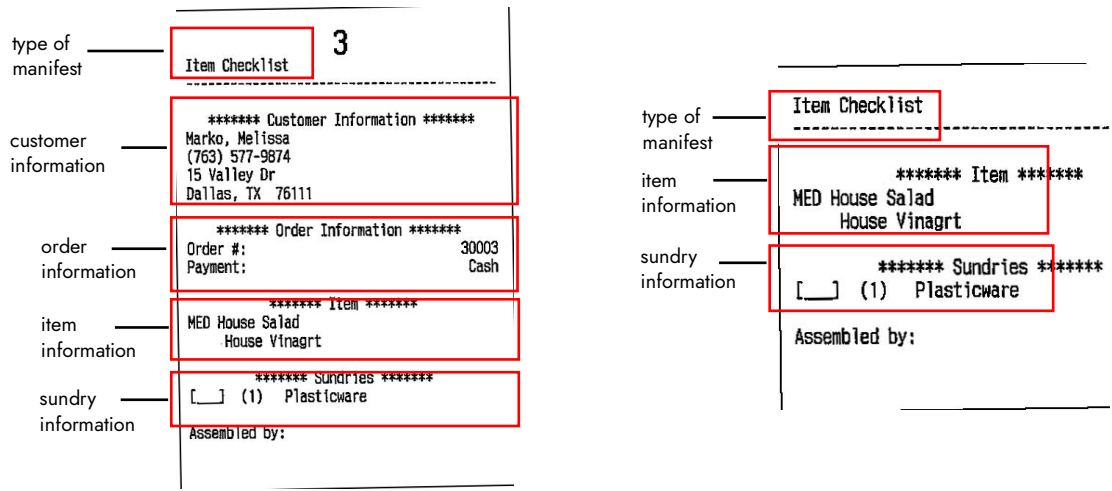


Figure 3 Item Checklist Bag Manifests

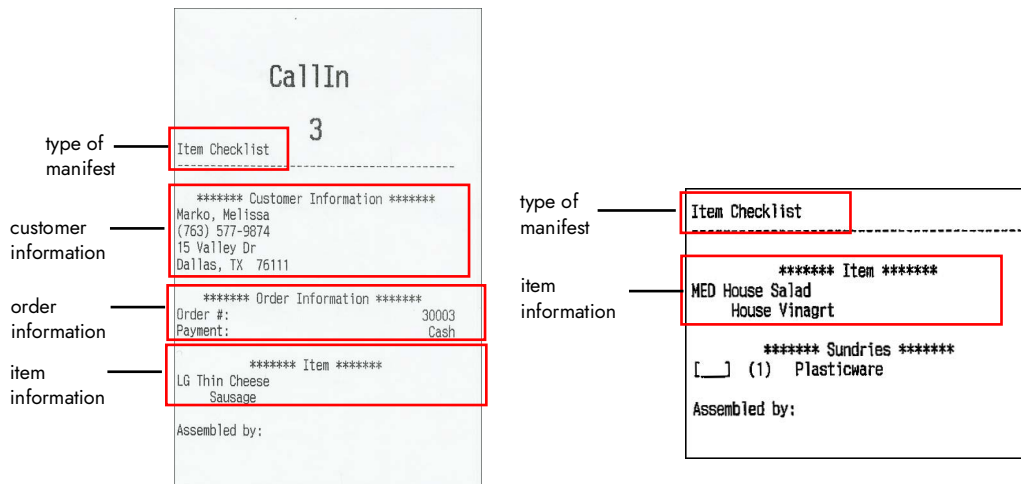


Figure 4 Item Checklist Bag Manifests

Configuring Bag Manifests

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

Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	Select Maintenance > Menu > Categories to create a category of items to include on bag manifests. You may not want to include some items or drinks on bag manifests. Recommendation: Create one item category with every item for which you may want to include on bag manifests. See page 8
2.	Select Maintenance > Takeout Configuration > Takeout Settings > Order Modes tab to enable and define how you wish to use bag manifests. Enable the printing of bag manifests for a particular order mode, the print trigger, and the information to include on bag manifests. See page 9.
3.	Select Maintenance > Takeout Configuration > Takeout Settings > Panel Options tab to add bag manifests print buttons to the ATO Front-of-House (FOH). These buttons allow you to manually print bag manifests. See page 12.
4.	Optionally, configure sundry items to print on bag manifests. See page 13. <ul style="list-style-type: none"> ○ Select Maintenance > Menu > Items to create sundry items. ○ Select Maintenance > Menu > Categories to create a sundry category and add a sundry item to that category. ○ Select Maintenance > Menu > Modifier groups to create a sundry modifier group for your sundries. ○ Select Maintenance > Menu > Items to add a sundry modifier group to each food item that requires a sundry. ○ Optionally, define and enable sundry substitutions. See page 18. Select Maintenance > Takeout Configuration > Takeout Settings > Printing tab to create sundry substitutions. You can substitute one sundry item for another when large quantities of a sundry item are required. While still in Takeout Settings, select the Order Modes tab to enable sundry substitutions.
5.	Select Maintenance > Takeout Configuration > Takeout Settings > Printing tab to add the delivery zone on the printed bag manifest chit.
6.	Access Utilities > POS > Refresh POS and All Installed Products to update the information on the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. See page 20.

Once you decide how you want to use the Bag Manifests feature, you must choose the configuration steps that are necessary to meet your operational needs. For example, if you decide you do not want

to include sundry items on your bag manifests, skip the section [Configuring sundry items to print on bag manifests](#).

Creating a category of items to include on bag manifests

We recommend creating a category of items in which you include only those items you potentially want to print on a bag manifest. This allows you to exclude items you may not want to appear on a bag manifest, such as drinks. Do not include your sundry items in this category, as you configure how to include sundry items on your bag manifests later in this document.

1. Select **Maintenance > Menu > Categories**.
2. Click the **New drop-down arrow**, select **'General'** from the drop-down list, and click **OK**.

Figure 5 Categories (Bag Manifest Items)

3. Under the 'Settings' group bar, accept the **system assigned number** or click the **ellipsis button (...)** to display the Number Assignments dialog box, from which you can choose an alternate number.
4. Type a **name** for the category, such as Bag Manifest Items.
5. Type a **description** for the category, such as Bag Manifest Items to Print.
6. Select the **Items** tab.
7. Select an **item** from the 'Available' list and use the right arrows to move the selected item to the 'Included' list. To remove an item, select the item from the 'Included' list and use the left arrows to move it to the 'Available' list. It is possible to select more than one item at a time, if desired.
8. Click **Save** and exit the Categories function.

Enabling and defining how you wish to use bag manifests

You enable the Bag Manifests feature for each order mode for which you want to print a bag manifest. Based on your operational needs, select the information you want to print on a bag manifest. For examples as to how the system prints an Order Checklist bag manifests based on your configuration selections, see [“Order Checklist Bag Manifests” on page 5](#) and for Item Checklist bag manifests see [“Item Checklist Bag Manifests” on page 6](#).

Option	To Print No Customer or Sundry Information	To Print Customer But Not Sundry Information	To Print Sundry But Not Customer Information	To Print Both Customer and Sundry Information
Items include header		ü		ü
Items include sundries			ü	ü

Option	To Print No Customer or Sundry Information	To Print Customer But Not Sundry Information	To Print Sundry But Not Customer Information	To Print Both Customer and Sundry Information
Orders include header		ü		ü
Orders include sundries			ü	ü

1. Select **Maintenance > Takeout Configuration > Takeout Settings**.
2. Select the **Order Modes** tab.
3. Select an **order mode** for which you want to print bag manifests, such as Delivery.
4. Select the **Order Modes Properties** tab.

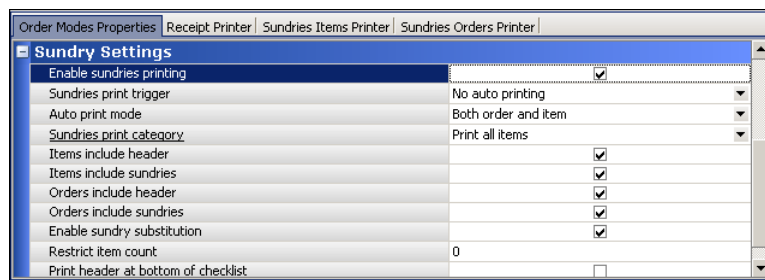


Figure 6 Takeout Settings - Order Modes - Order Modes Properties Tab

5. Under the ‘Sundry Settings’ group bar, select **Enable sundries printing**. Selecting this option enables the Bag Manifests feature for the selected order mode. This option does not control whether sundry items print on bag manifests. To enable sundry items to print, complete the configuration as outlined in [“Configuring sundry items to print on bag manifests” on page 13](#).

6. Select the **method** for determining if and when to print a bag manifest from 'Sundries print trigger.' This option does not control when to print sundry items, only when to print a bag manifest. Your choices are:
 - No auto printing – Requires you to manually initiate the printing of a bag manifest from the Aloha Takeout FOH.
 - Auto print on order items – Prints a bag manifest when you commit the order to an order mode.
 - Auto print on order bump – Prints a bag manifest when you bump the order from the kitchen video screen. This option requires Aloha Kitchen.

Note: If you select 'No auto printing,' you must add the bag manifest print buttons to the Aloha Takeout FOH so that you can manually initiate the printing of a bag manifest. Refer to ["Adding bag manifest print buttons to Aloha Takeout FOH" on page 12.](#)

7. If you choose one of the auto-print options in step 6, select an **auto print mode**. Your choices are:
 - Both order and item – Enables you to print both Order Checklist and Item Checklist bag manifests.
 - Order only - Enables you to print only Order Checklist bag manifests.
 - Item only - Enables you to print only Item Checklist bag manifests.
8. Select the **category of items** you created specifically for designating the items you potentially want to include on a bag manifest, such as the Bag Manifest Items category created earlier in this document. [See "Creating a category of items to include on bag manifests" on page 8.](#)
9. Select **Items include header**, if you want the customer information to appear in the top section of the Item Checklist bag manifest. Clear this option, if you do not.
10. Select **Items include sundries**, if you want sundry items to appear in the bottom section of the Item Checklist bag manifest. Clear this option, if you do not. For information on how to configure sundries, see ["Configuring sundry items to print on bag manifests" on page 13.](#)
11. Select **Orders include header**, if you want the customer information to appear in the top section of the Order Checklist bag manifest. Clear this option, if you do not.
12. Select **Orders include sundries**, if you want the sundry items to appear in the bottom section of the Order Checklist bag manifest. Clear this option, if you do not. For information on how to configure sundries, see ["Configuring sundry items to print on bag manifests" on page 13.](#)
13. Type a **maximum number** of items in 'Restrict item count,' to designate the point at which you do not want the system to print an Item Checklist bag manifest for an order. For example, if an order contains twenty-five pizzas, it may be inefficient to print an Item Checklist bag manifest for each pizza.
14. Select **Print header at bottom of checklist** to print the header at the bottom of the chit. By default, the order mode, order number, and customer information prints at the top of the checklist above the order information checklist. Use this feature for sites that hang tickets on a wheel in the kitchen.

15. Repeat for **each order mode** for which you want to print bag manifests.
16. Click **Save** and continue to the **next procedure**.

Designating the printers to which to route bag manifests

As stated earlier in this document, you typically want the Item Checklist bag manifest to print in the production area and the Order Checklist bag manifest to print in the expediter area. When you manually print a bag manifest, regardless of the type of bag manifest it is, it prints to the local receipt printer from which you initiate the print request; however, if you choose to automatically print bag manifests, you must define to which printer to route each type of bag manifest you implement.

1. While still in **Takeout Settings > Order Modes** tab, if you wish to print an Item Checklist bag manifest or an Order Checklist bag manifest, select either the **Sundries Items Printer** tab or the **Sundries Order Printer** tab, respectively. These tabs do not control to which printer your sundry items print, but rather the printer to which an Item Checklist or Order Checklist bag manifest prints.
2. Select an **appropriate printer**, based on the bag manifest you are defining, from the 'Available' list, and use the right arrows to move it to the 'Included' list. To remove a printer, select the printer from the 'Included' list and use the left arrows to move it to the 'Available' list. It is possible to select more than one printer, if desired.
3. Click **Save**.
4. Repeat **steps 1 through 3**, making the appropriate selections for the other type of bag manifest, if you wish to utilize both the Item Checklist and the Order Checklist bag manifests.
5. Continue with the **next procedure**.

Adding bag manifest print buttons to Aloha Takeout FOH

Whether you choose to automatically print your bag manifests or not, you can still manually print each type of bag manifest using buttons you make available on an Aloha Takeout FOH screen. You need to add a button for each type of bag manifest you implement.

1. While still in **Takeout Settings**, select the **Panel Options** tab.
2. Select a **tab** that correlates to an Aloha Takeout FOH screen on which you want to make print bag manifest buttons available.
3. Under the 'Actions' group bar, click the **Add** drop-down arrow, select either **Print Item Manifest** (Item Checklist) or **Print Order Manifest** (Order Checklist) as the Action type, and click **OK**.
4. Repeat this **procedure**, if you need to add a button for both types of bag manifests.
5. Use **Move up** and **Move down** to rearrange the bag manifest print buttons and customize the order in which they appear on the ATO FOH screen.
6. Click **Save**.
7. Repeat **steps 2 through 6** for each ATO FOH screen on which you want to make bag manifest print buttons available.
8. Exit the **Takeout Settings** function.

Configuring sundry items to print on bag manifests

If you wish to include sundry items, such as plastic ware and condiments, on your bag manifests, you must perform additional configuration to make this happen. If not, continue to [“Refreshing the data” on page 20](#).

To configure sundry items to print on bag manifests, the system requires you to:

1. Create an item in Item Maintenance for each sundry item. See [page 14](#).
2. Create a category of items specifically for sundry items, and then add each sundry item to that category. See [page 15](#).
3. Create a modifier group specifically for sundry items and add each sundry item to that modifier group. See [page 16](#).
4. Add the new sundry modifier group to each food item for which you provide one or more sundry items. See [page 17](#).
5. (Optional) Enable sundry substitution and define the sundry items for which you allow substitution. For example, 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. See [page 18](#)

Aloha Takeout prints items and modifiers based on the priority configured in Item Routing Maintenance in the POS, as opposed to the order in which you enter them.

Creating sundry items

Create an item for each sundry, such as plastic ware and condiments, you include in delivery or takeout orders, similar to how you configure a sales item. We recommend designating a group of numbers specifically for numbering your sundry items.

1. Select **Maintenance > Menu > Items**.
2. Click the **New** drop-down arrow, select **Standard** as the item type, and click **OK**.

Settings	
Number	1002
Short name	Plastic Spoon
Chit name	Plastic Spoon
Chit name alternate	
Long name	Plastic Spoon
Long name alternate	
Type	Standard
Button image	None
Control name	
Ask for description	<input type="checkbox"/>
Cost	0.0000
Export ID	0
Assignments	
Tax group	None
Concept	None
Sales/retail category	FOOD
Auto menu	
Priority	1 Highest
Advanced Pizza	
Topping	<input type="checkbox"/>

Figure 7 Items (Plastic Spoon)

3. Under the 'Settings' group bar, click the **ellipsis button (...)** to display the Number Assignments dialog box, from which you can choose from the group of numbers you set aside for numbering sundry items.
4. Type a **name** for the item in 'Short name.'
5. Press the '**Tab**' key and the text name appears in 'Chit name' and 'Long name.' You can modify this text, if desired.
6. Under the 'Assignments' group bar, select a '**sales' category** under which you would like the sundry items to report. It is necessary to assign a sales or retail category to every item before the system allows you to save the record.
7. Click **Save**.
8. Repeat **this procedure** for each sundry item you need to create.
9. Exit the **Items** function and continue to the **next procedure**.

Creating a sundry category

After you create your sundry items, create a category of items specifically for sundry items, and then add each sundry item to that category.

1. Select **Maintenance > Menu > Categories**.
2. Click the **New** drop-down arrow, select **General** as the category type, and click **OK**.

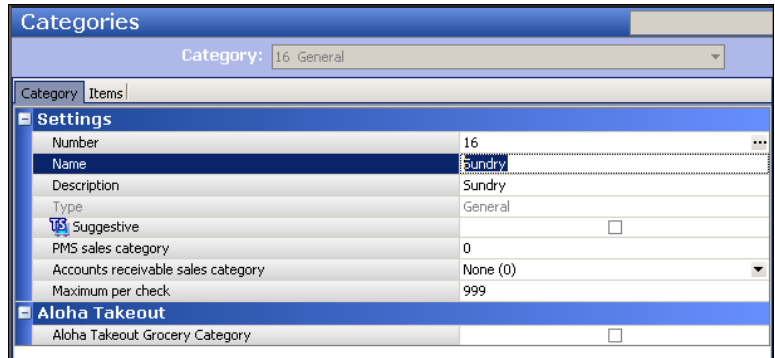


Figure 8 Categories (Sundry)

3. Under the 'Settings' group bar, accept the **system assigned number** or click the **ellipsis button (...)** to display the Number Assignments dialog box, from which you can choose an alternate number.
4. Type a **name** for the category, such as Sundry Items.
5. Type a **description** for the category, such as Sundry Items Category.
6. Click **Save**.
7. Select the **Items** tab.

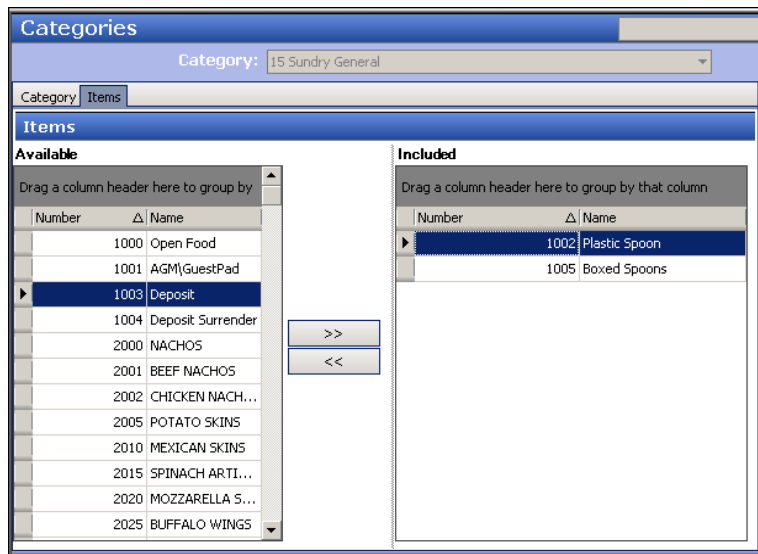


Figure 9 Categories - Items (Sundry)

8. Select an **item** from the 'Available' list and use the **right arrows** to move the selected item to the 'Included' list. To remove an item from the category, select the item from the 'Included' list and use the left arrows to move it to the 'Available' list. It is possible to select more than one item at a time.
9. Click **Save** and exit the **Categories** function.
10. Continue to the **next procedure**.

Creating a sundry modifier group

After creating a sundry category and adding the sundry items to it, it is necessary to create a modifier group.

1. Select **Maintenance > Menu > Modifier Groups**.
2. Click the **New drop-down arrow**, select **Standard** as the modifier group type, and click **OK**.
3. Under the 'Settings' group bar, accept the **system assigned number** or click the **ellipsis button (...)** to display the Number Assignments dialog box, from which you can choose an alternate number.
4. Type a **name** for the modifier group, such as Sundries, in 'Short name.'
5. Change the **name** in 'Long name,' if desired.
6. Select the **Layout** tab.

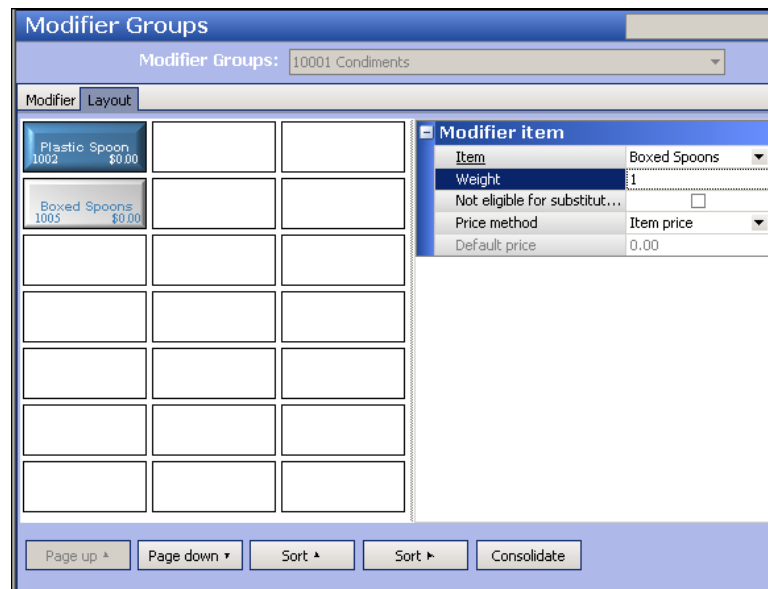


Figure 10 Modifier Groups (Sundries)

7. Select an **available button**.
8. Under the 'Modifier item' group bar, select a **sundry item** from the drop-down list.
9. Select **Not eligible for substitution**.
10. Repeat for **each additional sundry item** to add to this modifier group.

11. Click **Save** and exit the **Modifier Groups** function.
12. Continue to the **next procedure**.

Adding the sundry modifier group to each applicable food item

After creating a sundry modifier group, add the new sundry modifier group to each food item for which you provide one or more sundry items. You must associate a sundry modifier group to each food item requiring a sundry item.

1. Select **Maintenance > Menu > Items**.
2. Select the **item** for which you want to add the sundry modifier group.
3. Select the **Modifier** tab.

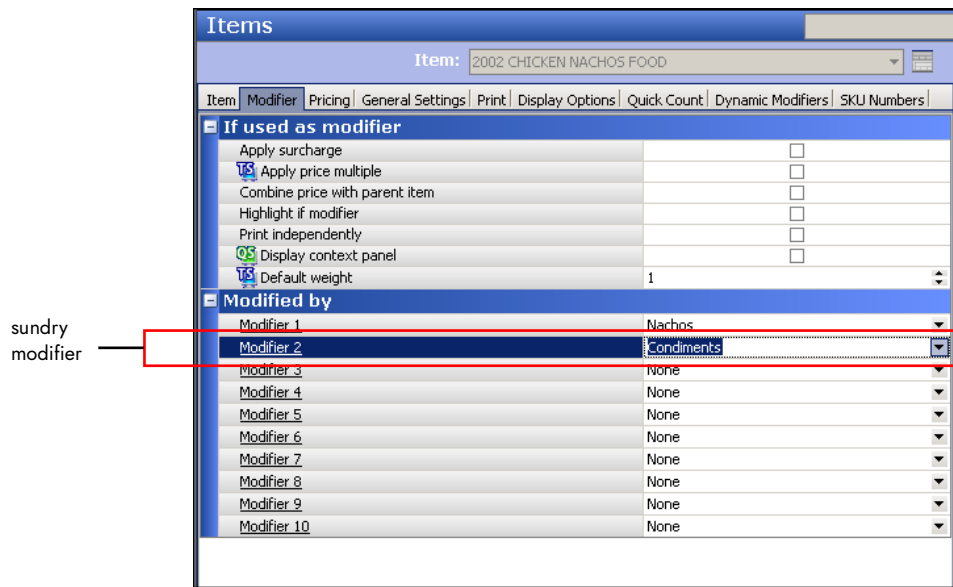


Figure 11 Items - Modifier Tab

4. Under the 'Modified by' group bar, select the **sundry modifier group** in the last available 'Modifier x' drop-down list. We recommend placing the sundry modifier group at the bottom of the list, leaving the top portion available for modifiers related to the preparation of the food item.
5. Select the **Dynamic Modifiers** tab.

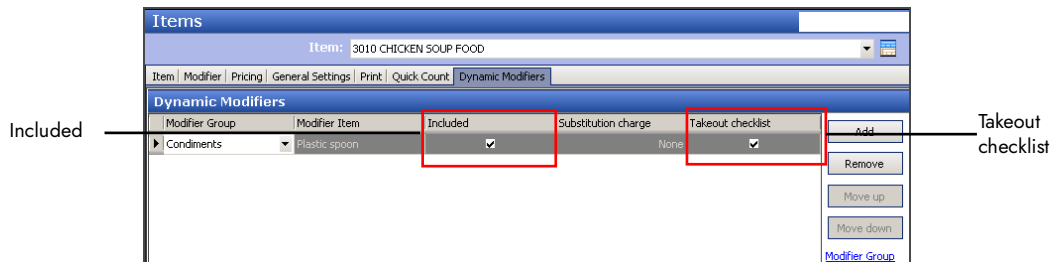


Figure 12 Items - Dynamic Modifiers Tab

6. Under the 'Dynamic Modifiers' group bar, click **Add**, on the right side of the screen to add a new blank dynamic modifier.
7. Select the **sundry modifier group** from the 'Modifier Group' drop-down list.
8. Select an **item** from the sundry modifier group from the 'Modifier item' drop-down list.
9. For systems using Aloha POS v6.7 and below, select **Included**.
-OR-
For systems using Aloha POS v12.3 and above, select **Takeout checklist**.
10. Repeat **steps 8 and 9** to add additional dynamic modifiers from the Sundry modifier group.
11. Click **Save** and exit the **Items** function.

Defining sundry substitutions

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.

Note: In some instances, it can be cheaper for you to send one large item rather than multiples of a smaller item, such as a large bag of chips rather than multiples of small bags of chips.

Tip: Prior to creating sundry substitutions, you must create the sundry substitution as an item and assign it to a Sundry category.

To define sundry substitutions:

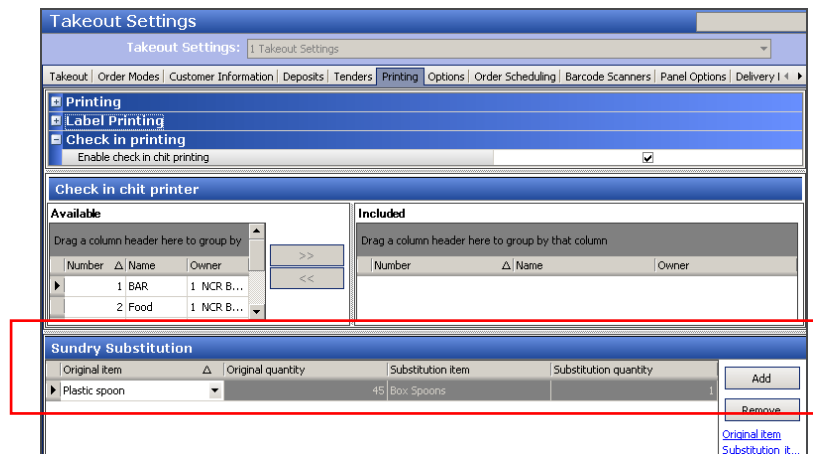


Figure 13 Takeout Settings - Printing Tab - Sundry Substitution Tab

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Printing** tab.
2. Under the 'Sundry Substitution' group bar, click **Add**.
3. Select the **sundry item** for which you want to create a substitution from 'Original item.'
4. Type the **quantity**, or use the **up** and **down arrows** to select the quantity, at which you want to substitute an individual item for another, in 'Original quantity.'
5. Select the **item** to substitute for the original item from 'Substitution item.'
6. Type the **quantity**, or use the **up** and **down arrows** to select the quantity, required to replace the original item quantity, in 'Substitution quantity.'
7. Click **Save**.
8. Repeat **steps 2 through 7** for each sundry item for which you want to define a substitution item.
9. Exit the **Takeout Settings** function.

To enable sundry substitution:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Order Modes** tab.
2. Select the **Order Modes Properties** tab.
3. Under the 'Sundry Settings' group bar, select **Enable Sundry Substitution**.
4. Click **Save**.

Defining printing requirements for bag manifests

You can include the delivery zone to print on the item and order manifest chit.

To define the printing requirements for bag manifests:

1. Select **Maintenance > Takeout Configuration > Takeout Settings**.
2. Select the **Printing** tab.
3. Under the 'Printing' group bar, select **Print zone on order manifest** to print the delivery zone on an order manifest chit. You must capture the address on the order to use this option.
4. Select **Print zone on item manifest** to print the delivery zone on an item manifest chit. You must capture the address on the order to use this option.
5. Click **Save** and exit the **Takeout Settings** function.

Refreshing the data

After all settings are in place in Aloha Manager, you must select Utilities > POS > Refresh POS and 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.

Using Bag Manifests

Bag Manifests serve as a checklist to increase order accuracy and guest satisfaction. Use the Item Checklist bag manifest to ensure the preparation of each item and use the Order Checklist bag manifest to ensure you collect all items, and any sundries, for an order prior to giving the order to a customer. You may elect to attach an Order Checklist bag manifest to each bag prior to giving it to a customer. In some instances, you may need to reprint a bag manifest, which you can do from the Aloha Takeout FOH.

Manually printing a bag manifest

Should an employee misplace a bag manifest, or should you want to attach a clean manifest to the bag, you can manually print a bag manifest from the Aloha Takeout FOH.

Note: When you print an item bag manifest, each item you select prints an individual chit.

To manually print an Item Checklist bag manifest:

1. Touch **Orders** on the navigation bar to access the Orders screen.
2. Type a **customer name** or **phone number** and press **Enter**.

Note: You can also search for a customer order at the Order, Pick Up, Dispatch, Map, and Future screens.

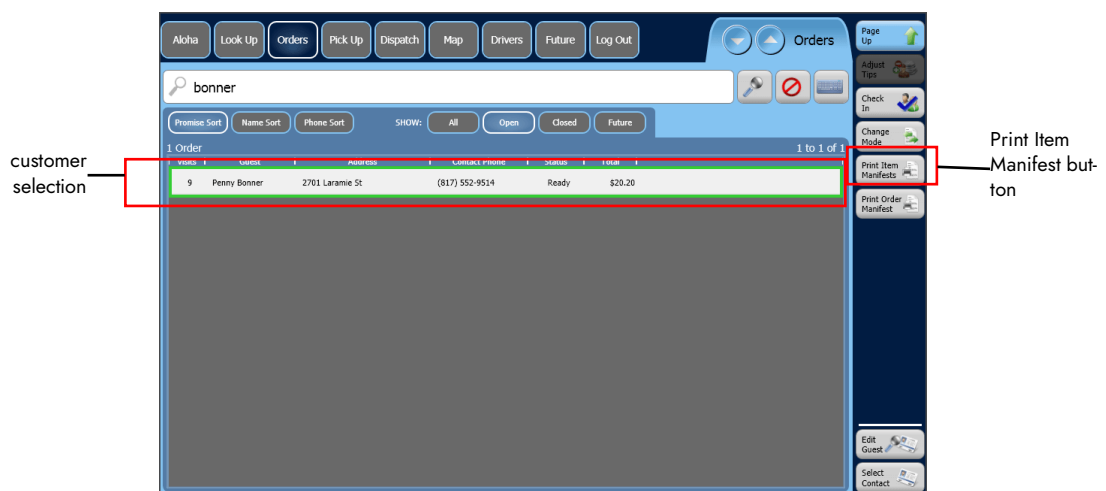


Figure 14 FOH Customer Selection

3. Select the **order** from the search results.

4. Touch **Print Items Manifest** on the right side of the screen. The Order Receipt screen appears.



Figure 15 FOH Order Receipt Screen

5. Select the **items** for which you want to print a bag manifest. Use the up and down arrows to find the items you want to select. The selected items and any accompanying modifiers appear in green.
6. Touch **Ok**. An Item Checklist bag manifest prints to the local receipt printer for the terminal.

To manually print an Order Checklist bag manifest:

1. Touch **Orders** on the navigation bar to access the Orders screen.
2. Type a **customer name** or **phone number** and press **Enter**.

Note: You can also search for a customer order at the Order, Pick Up, Dispatch, Map, and Future screens.

3. Select the **order** from the search results.
4. Touch **Print Order bag manifest** on the right side of the screen. The Order Bag Manifest prints to the local receipt printer for the terminal.

Reporting Bag Manifests

There are few reporting needs for the bag manifest feature; however, you can include a 'Display item sundries' and 'Display order sundries' subsection with bag and order manifest items on the Future Order report. Use these sections as a preparation sheet of manifest items and eliminate the need to print the manifest from a local receipt printer.



Reference: Refer to the Aloha Takeout Report Guide for more information on the Future Order report.

Bag Manifests, Feature Focus Guide

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