

# Feature Focus Guide:

# Future Orders and Deposits

Core Product: Aloha Takeout  
Last Updated: January 17, 2024

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## Revision Record

Date	Version #	Description
Prior to 12/13/2022	v1.0+	Introduced Future Orders and Deposits.
	v13.1+	Introduced Recurring Orders.
	v14.1+	Enhanced Future Orders with: Provide the ability to start a future order from the express entry screen. Define the order modes available on the Delayed Order Information screen. Configure printing requirements for future orders. Purge expired future orders at End-of-Day.
06/07/2022		Converted document to use new templates.
12/13/2022		Updated front cover and back page to reflect new branding.
05/12/2023		Updated document to reflect NCR Voyix branding.

## About Future Orders and Deposits

Future Orders and Deposits at a Glance	
Core Product	Aloha <sup>®</sup> Quick Service, Aloha Table Service
Complementary Products	Aloha Takeout
Separate License Required?	<p><b>Takeout</b> — Aloha Takeout requires a separate license.</p> <p><b>Delivery</b> — 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><b>Mapping</b> — A separate license is also required for the mapping module, if you elect to install it.</p>
Other References	Aloha Takeout Reference Guide, Aloha Takeout Report Guide

The ability to accept future orders can be an important part of your business. This guide discusses how to configure and use future orders, which allows you to accept, schedule, and manage orders for up to five years in advance in Aloha<sup>®</sup> Takeout. You can control how you manage and release future orders to the kitchen, and you can accept deposits from customers to prepay part or all of a future order, to cover labor and food costs in the event a customer abandons an order.

Aloha Takeout also allows you to accept and schedule recurring orders, referred to as “patterns,” to establish and manage these orders. With Aloha Takeout, it is easy to respond to customer requests to change the items and quantities within a recurring order, change the date of an individual order, change the frequency of the recurrence, and even cancel the recurring order.

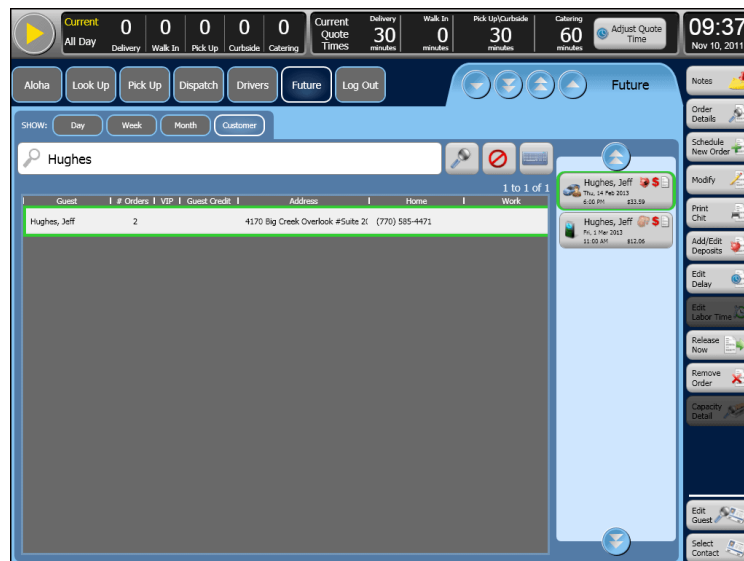


Figure 1 FOH Future Order Screen

## Configuring Future Orders and Deposits

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

### Steps at a Glance:

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

1.	Select <b>Maintenance &gt; Takeout Configuration &gt; Takeout Settings &gt; Options</b> tab to enable future orders. See <a href="#">page 7</a> .
2.	Establish the <b>method</b> for the release of future orders. See <a href="#">page 8</a> .
3.	Configure void reasons for future and canceled orders. See <a href="#">page 13</a> . Select <b>Maintenance &gt; System Settings &gt; Void Reasons</b> to create void reasons for future and canceled orders. ATO requires a future order void reason for when a future order becomes an active order and is removed from the SQL database by the system. A cancel void reason is for when a customer cancels an ATO order. Select <b>Maintenance &gt; Labor &gt; Pos Access Levels</b> to provide the ability to cancel future orders.
4.	Configure deposits for use with Aloha Takeout. See <a href="#">page 16</a> . Select <b>Maintenance &gt; Menu &gt; Items &gt; Items</b> tab to create Deposit and Deposit Surrender items. Select <b>Maintenance &gt; Payments &gt; Tenders &gt; Tender</b> tab to create a deposit tender. Select <b>Maintenance &gt; Takeout Configuration &gt; Takeout Settings &gt; Tenders</b> tab to specify which Aloha Point-of-Sale (POS) tenders are 'Available for deposits.' It is necessary to do this for all tenders you can use when accepting a deposit. While still in Takeout Settings, select the <b>Deposits</b> tab to enable and configure deposits for future orders. Select <b>Maintenance &gt; Labor &gt; POS Access Levels</b> to configure which access levels can authorize the refund or surrender of a deposit.
5.	Select <b>Maintenance &gt; Takeout Configuration &gt; Takeout Settings &gt; Panel Options &gt; Express Entry</b> tab to add the Delayed order mode and provide the ability to start a future order from the express entry screen. See <a href="#">page 24</a> .
6.	Select <b>Maintenance &gt; Takeout Configuration &gt; Takeout Settings &gt; Panel Options &gt; New Future Orders</b> tab to define the order modes available on the Delayed Order Information screen. See <a href="#">page 25</a> .
7.	Select <b>Maintenance &gt; Takeout Configuration &gt; Takeout Settings &gt; Printing</b> tab to configure the printing for future orders. See <a href="#">page 26</a> .
8.	Select <b>Maintenance &gt; Takeout Configuration &gt; Takeout Settings &gt; Options</b> tab and select 'Delete overdue unreleased future orders at EOD' to purge expired future orders at End-of-Day. See <a href="#">page 26</a> .

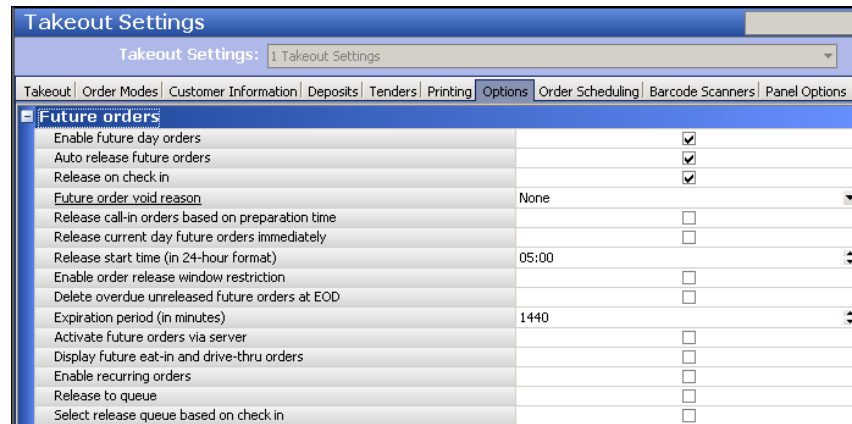
**Steps at a Glance:**

9.	Select <b>Maintenance &gt; Takeout Configuration &gt; Takeout Settings &gt; Options</b> tab to enable recurring orders. See <a href="#">page 28</a> .
10.	Access <b>Utilities &gt; POS &gt; Refresh POS and All Installed Products</b> to update the information on the Front-of-House (FOH) terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you.

## Enabling Future Orders and Deposits

To accept and schedule orders in advance, you must enable the Future Orders feature. Once enabled, a Start Delayed button appears on the right side of the FOH Look Up screen, from which you enter and release one-time future orders.

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



The screenshot shows the 'Takeout Settings' window with the 'Options' tab selected. Under the 'Future orders' group bar, the following settings are visible:

Setting	Value	Checkbox
Enable future day orders		<input checked="" type="checkbox"/>
Auto release future orders		<input checked="" type="checkbox"/>
Release on check in		<input checked="" type="checkbox"/>
Future order void reason	None	
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"/>
Select release queue based on check in		<input type="checkbox"/>

Figure 2 Future Orders Group Bar

2. Under the 'Future orders' group bar, select **Enable future day orders**.
3. Select **Activate future orders via server** so that you can release future orders from the back-of-house without the need for an ATO instance running on a front-of-house terminal. To work properly, you must configure the ATO service to start an instance of the Aloha Point-of-Sale (POS) system on the Back-of-House (BOH) system.
4. Click **Save** and continue to the **next procedure**.

## Establishing the method for releasing Future Orders and Deposits

You need to establish how to manage and release future orders to the kitchen for preparation. Aloha Takeout provides a number of ways for which you to configure the release of future orders for your operation. This section only discusses the following three operational scenarios:

- **Method 1: ATO Controls the Order Release** Aloha Takeout controls the release of an order for preparation based on promise and prep time. For delivery orders, you can also include delivery time in the calculation.
- **Method 2: Staff Controls the Order Release** You, or someone on your staff, manually controls the release of an order and the kitchen staff begins preparation based on the promise time printed on the chit.
- **Method 3: Customer Controls the Order Release** The customer controls the release of an order for preparation based on arrival time, by either using a beacon or a check-in process .

Recommended Configuration in Takeout Settings:	Method 1: ATO Controls	Method 2: Staff Controls	Method 3: Customer Controls
<b>Auto release future orders</b>	✓		
<b>Release on check in</b> Also configure Check In button and optional check-in chit printing.			✓
<b>Release call-in orders based on preparation time</b>		✓	
<b>Release current day future orders immediately</b> Requires setting a start time.		✓	
<b>Enable order release window restriction</b> Requires configuring a time window.	✓		

### Method 1: Configuring ATO control of order release

Configure ATO to control order release when you want the system to release each future order based on the promise and prep time for the order. In the case of an early arrival, you can use a Check In button to notify the kitchen staff without actually releasing the order. The kitchen staff determines if they can prepare the order in advance of the promise time and then you need to use the Release Now button to release the order.

**SCENARIO:** SCENARIO: If the promise time of an order is 12:30 p.m. with a prep time of 10 minutes, ATO automatically releases the Call In order at 12:20 p.m. If this is an order for delivery, and the default delivery time is 20 minutes, ATO automatically releases the order at 12:00 p.m.



**To allow ATO to control order release time:**

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the 'Future orders' group bar, select **Auto release future orders**.
3. Clear **Release on check in**.
4. Clear **Release call-in orders based on preparation time**.
5. Clear **Release current day future orders immediately**.
6. Select **Enable order release window restriction**. When selected, this option controls the time frame during which the system can release future orders to the kitchen.
7. Enter a **start time** that is after the ATO end-of-day routine runs and the kitchen staff is ready to prepare orders.
8. Enter an **end time** that is before the ATO end-of-day routine runs and the kitchen is closed or no longer able to prepare orders. Orders scheduled to release after the end time release at the start time on the following day.
9. Click **Save** and continue with the **next procedure**.

**To set the default drive time quote for operations that offer delivery:**

1. Select **Takeout Settings > Options** tab.
2. Under the 'Delivery' group bar, select **Enable drive time**.
3. Click **Save**.
4. Select **Takeout Settings > Panel Options > Info Bar** tab.

Elements	
Element name	
Call in Quote	
Walk In Quote	
Delivery Quote	
Catering Quote	
<input checked="" type="checkbox"/> Default Drive Time	
Daily Message	

Buttons: Add, Remove

Figure 3 Elements Tab - Default Drive Time

5. Under the 'Elements' group bar, click the **Add** drop-down arrow, select **Default Drive Time** as the Element type, and click **OK**. This element adds the drive time quote to the Dashboard Settings screen, which allows you to enter and adjust a quote time throughout the day. If you want to reset

the drive time quote to a default value during the end of day, continue to step 5; otherwise, continue to step 7

Metric name	Reset at EOD value (in minutes)
Default Drive Time	10

Figure 4 Default Drive Time Metrics

- Under the 'Metrics' group bar, click the **Add** drop-down arrow, select **Default Drive Time** as the Metric type, and click **OK**.
- In 'Reset at EOD value (in minutes),' enter the **minutes** for your default drive time.
- Click **Save** and continue to the **next procedure**.

**To provide the ability to adjust the delivery drive time quote:**

- Select **Maintenance > Labor > Pos Access Levels**.
- Select an **access level** from the drop-down list.
- Under the 'Aloha Takeout' group bar, select **Can adjust quote time**.
- Click **Save**.
- Repeat this procedure for each **access level** that can adjust the delivery drive time quote.
- Exit the **POS Access Levels** function.

**Method 2: Configuring staff control of order release**

Configure ATO so that you, or someone on your staff, manually release future orders when received or well in advance of the promise time. The kitchen staff uses the promise time printed on the kitchen chit to time and prepare orders, as necessary.

**SCENARIO:** SCENARIO: You arrive in the morning and select all future orders due for the next meal period or for the entire day, then touch Release Now. The system prints the orders to the kitchen with the promise time on the chit. Your kitchen staff organizes the orders and times the preparation accordingly. Repeat this procedure for new orders you receive throughout the day.

**To allow staff control of order release:**

- Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
- Under the 'Future orders' group bar, clear **Auto release future orders**. Clearing this option requires the manual release of future orders for preparation.
- Clear **Release on check in**.

4. Clear **Release call-in orders based on preparation time**.
5. Select **Release current day future orders immediately**. You must select a start time for orders to begin releasing to the kitchen so that your kitchen staff can manage the timing of the preparation of the orders.
6. Clear **Enable order release window restriction**.
7. Click **Save** and continue to the **next procedure**.

**To enable the selection of multiple orders:**

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Panel Options > Future** tab.
2. Under the 'Settings' group bar, select **Enable multi-selection** to allow the selection of multiple future orders for release when you touch Release Now.
3. Under the 'Actions' group bar, click the **Add** drop-down arrow, select **Release Now** as the Action type, and click **OK**.
4. Click **Save**.

**Method 3: Configuring customer control of order release**

Configure ATO so that orders do not release for preparation until a customer arrives and checks in. Add a Check In button to as many ATO FOH screens as you want. This button appears with other action buttons on the right side of the screen and allows you to notify the kitchen when a customer who placed a future order arrives at your restaurant. If you want a check-in chit to print, you need to configure check-in chit printing.

**SCENARIO:** SCENARIO: A customer calls in, places an order, and states they will arrive at your restaurant in an hour. When the customer arrives, use the Check In button to release the order to the kitchen for preparation.

**To allow customer control of order release:**

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the 'Future orders' group bar, clear **Auto release future orders**. Clearing this option requires the manual release of future orders for preparation.
3. Select **Release on check in**. Selecting this option holds the release of a future order for preparation until a customer arrives and checks in.
4. Clear **Release call-in orders based on preparation time**.
5. Clear **Release current day future orders immediately**.
6. Clear **Enable order release window restriction**.
7. Click **Save** and continue to the next **procedure**.

### To add the Check In button to the ATO FOH:

1. In Takeout Settings on the **Panel Options** tab, select the tab that correlates to the screen on which you want the Check In button to appear. You can add the Check In button to more than one ATO FOH screen.
2. Under the 'Actions' group bar, click the **Add** drop-down arrow, select **Check In** as the Action type, and click **OK**.
3. Use **Move up** and **Move down** to rearrange action buttons in the selected list and customize the order in which they appear on the ATO FOH screen.
4. Click **Save**.
5. Repeat this procedure for **each Aloha Takeout tab** on which to add a Check In button.
6. Continue to the next **procedure**.

### To configure the check in chit printer:

1. In Takeout Settings on the **Printing** tab, under the 'Check in printing' group bar, select **Enable check in chit printing**.

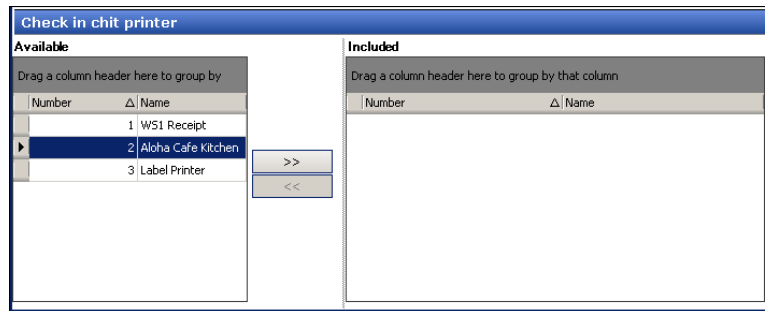


Figure 5 Check In chit printing

2. Under the '**Check in chit printer**' group bar, select the desired printer in 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.
3. Click **Save**.

## Creating void reasons for future and canceled orders

To support future orders, you must configure two void reasons: Future Order and Canceled Order.

- When you add a future order to the system, ATO stores the order detail in a SQL database until the time at which you release the order. An order becomes an active POS order at the time of its release and is removed from the SQL database using the Future Order void reason.
- When a customer calls to cancel an order, ATO uses the Canceled Order void reason to void the check. You determine if the Canceled Order void reason affects inventory or not, based on if you can prevent the items from being prepared, you can reuse the items, or if you typically prepare and waste the items as a result of a canceled order.

**Note:** If you remove an order from Aloha Takeout prior to its release, there is no impact to your inventory.

### To create void reasons for Aloha Takeout:

1. Select **Maintenance > System Settings > Void Reasons**.
2. Click **New** to create a new void reason.
3. Type a **name**, such as Future Order, in 'Description.'

The screenshot shows the 'Void Reasons' configuration interface. At the top, there's a dropdown menu for 'Void Reason' set to '99 Future Order'. Below this is a 'Settings' section with a table. The table has columns for 'Number', 'Description', 'Return voided items back to inventory', 'For Aloha Connect Use Only', and 'Do Not Report'. The row for '99' shows 'Future Order' as the description, 'Return voided items back to inventory' is unchecked, 'For Aloha Connect Use Only' is checked, and 'Do Not Report' is checked.

Number	Description	Return voided items back to inventory	For Aloha Connect Use Only	Do Not Report
99	Future Order	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 6 Future Order Void Reason

The screenshot shows the 'Void Reasons' configuration interface. At the top, there's a dropdown menu for 'Void Reason' set to '4'. Below this is a 'Settings' section with a table. The table has columns for 'Number', 'Description', 'Return voided items back to inventory', 'For Aloha Connect Use Only', and 'Do Not Report'. The row for '4' shows 'Cancelled Order' as the description, 'Return voided items back to inventory' is unchecked, 'For Aloha Connect Use Only' is checked, and 'Do Not Report' is unchecked.

Number	Description	Return voided items back to inventory	For Aloha Connect Use Only	Do Not Report
4	Cancelled Order	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure 7 Canceled Order Void Reason

4. Select or clear **Return voided items back to inventory** based on the following criteria:
  5. For the Future Order void reason, clear **Return voided items back to inventory**, since these items are not ordered.
- OR —

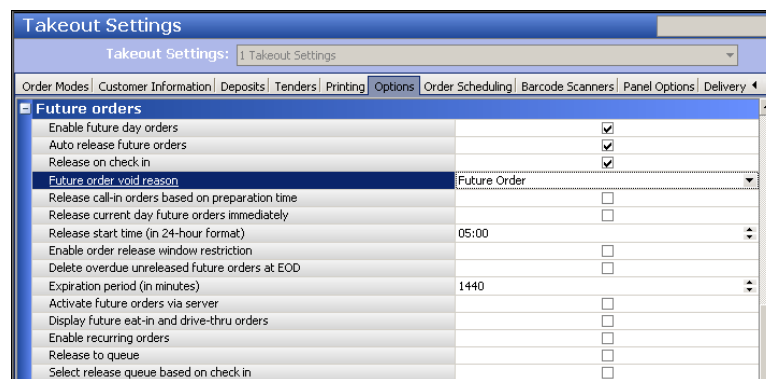
For the Canceled Order void reason, select **Return voided items back to inventory**, if you can prevent the items from being prepared or can reuse the items; clear **Return voided items back to inventory**, if you typically prepare and waste the items as a result of a canceled order.

6. Select **For Aloha Connect Use Only** for both void reasons to prevent these void reasons from appearing on the Aloha POS system FOH void screen. This prevents the mis-use of the void reason by managers.
7. Select or clear **Do Not Report** based on the following criteria:  
For the Future Order void reason, select **Do Not Report**.  
-OR-  
For the Canceled Order void reason, clear **Do Not Report**.

8. Click **Save** and exit the **Void Reasons** function.

#### To associate the new void reasons with Aloha Takeout:

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



Takeout Settings	
Takeout Settings: 1 Takeout Settings	
Order Modes   Customer Information   Deposits   Tenders   Printing   Options   Order Scheduling   Barcode Scanners   Panel Options   Delivery	
<b>Future orders</b>	
Enable future day orders	<input checked="" type="checkbox"/>
Auto release future orders	<input checked="" type="checkbox"/>
Release on check in	<input checked="" type="checkbox"/>
Future order void reason	Future Order
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"/>
Select release queue based on check in	<input type="checkbox"/>

Figure 8 Order Cancel Void Reason

- Under the 'Settings' group bar, select the **void reason** you created for canceled orders from the 'Order cancel void reason' drop-down list.

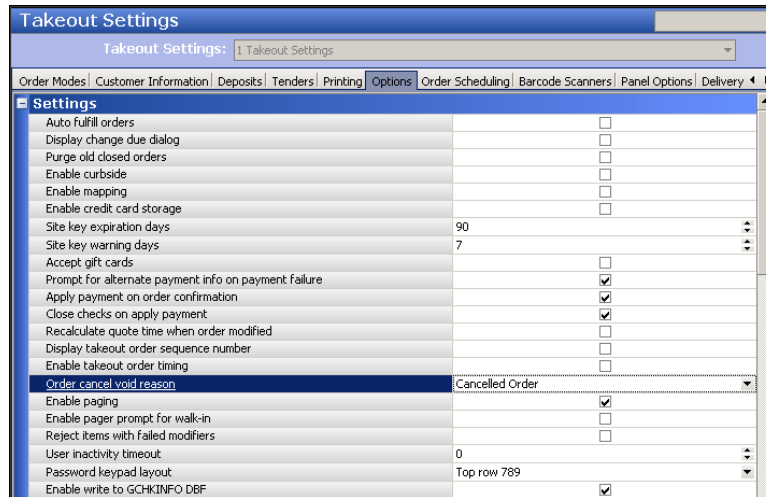


Figure 9 Future Order Void Reason

- Under the 'Future orders' group bar, select the **void reason** you created for future orders from the 'Future order void reason' drop-down list.
- Click **Save**.

**To provide the ability to cancel future orders:**

- Select **Maintenance > Labor > Pos Access Levels**.
- Select an **access level** from the 'POS Access Level' drop-down list.
- Under the 'Financial' group bar, select **Void items**.
- Click **Save**.
- Repeat for **each access level** that can cancel a future order.
- Exit the **Pos Access Levels** function.

## Configuring Deposits

You can use deposits to prepay part or all of a future order to cover labor and food costs in the event a customer abandons the order. Aloha Takeout allows customers to add multiple deposits to a future order until the system releases the order to the kitchen. This section details how to enable deposits, as well as how to specify the way in which Aloha Takeout and the Aloha POS system interact to make use of the feature. When a customer pays a deposit for a future order, the deposit is not recognized as sales, as items configured as 'Revenue items' in the Aloha Point-of-Sale (POS) system do not affect sales.

### Creating Deposit and Deposit Surrender items

When you need to accept a deposit for a future order, the Aloha Takeout 'Add Deposit' function creates a check and adds the deposit item to the check in the amount of the deposit. You tender and close the check based on the tender you select on the ATO Deposit screen, as determined by the customer.

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, it is necessary to 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 create. See ["Creating a deposit tender" on page 19.](#) The



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

The figure shows two screenshots of the 'Items' maintenance window for a '900001 Deposit RETAIL' item.

**Top Screenshot (Settings Tab):**

Field	Value
Number	900001
Short name	Deposit
Chit name	Deposit
Chit name alternate	
Long name	Deposit
Long name alternate	
Type	Standard
Button image	None
Control name	
Ask for description	<input checked="" type="checkbox"/>
Cost	0.0000
Export Id	0
Tax group	Tax Group 1
Concept	None
Sales/retail category	RETAIL
Auto menu	1 Highest

**Bottom Screenshot (General and Video Tabs):**

**General Tab:**

Field	Value
Revenue item	<input checked="" type="checkbox"/>
No gratuity	<input type="checkbox"/>
Guest count weight	1
Label	None
Product mix report multiplier	1

**Video Tab:**

Field	Value
Do not show when item	<input type="checkbox"/>
Do not show on summary cell when item	<input type="checkbox"/>
Do not show when modifier	<input type="checkbox"/>
Show modifier independently	<input type="checkbox"/>

A callout points to the 'Tax group' field in the top screenshot, stating: "Tax group is set to a zero percent tax rate."

Figure 10 Item Maintenance, Deposit Item

### To create a 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 the '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.  
  
Select a **category** under which you would like deposits to report from the 'Sales/retail category' drop-down list.
6. Select the **Pricing** tab.

7. 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.

**Note:** If the 'Ask for Price' pricing method does not appear as a pricing method, you must clear 'Restrict price edit' in Maintenance > Business > Additional Features > Restriction settings group bar.

8. Select the **General Settings** tab.
9. Select **Revenue item**.
10. Click **Save** and continue to the next **procedure**.

#### To create a Deposit Surrender item:

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

The figure displays two screenshots of the 'Items' maintenance screen. The top screenshot shows the 'Settings' tab with the following fields: Number (900002), Short name, Chit name, Chit name alternate, Long name, Long name alternate, Type (Standard), Button image (None), Control name, Ask for description (checked), Cost (0.0000), and Export Id (0). The bottom screenshot shows the 'Pricing options' tab with the following fields: Eligible for fixed pricing (checked), Pricing method (Ask for Price), Minimum price (0.00), and Maximum price (999999.99).

Figure 11 Item Maintenance > Deposit Surrender Item

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 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 surrendered deposit amount selected on the Deposit screen.
9. Click **Save** and exit the **Items** function.

### Creating a deposit tender

Aloha Takeout uses the deposit tender to reduce the balance due on the check by the deposit amount previously paid by the guest.

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

The screenshot shows the 'Tenders' maintenance window. At the top, the 'Tender' dropdown is set to '40 House Generic'. Below this are tabs for 'Tender', 'Type', 'Identification', 'Authorization', 'Reconciliation', 'Printers', and 'Rounding'. The 'Settings' section includes fields for Number (40), Name (House), Type (Generic), and various checkboxes for 'First available button position', 'Button position' (Row 5, Column 3), 'Button image' (None), 'Report as' (House), 'Default amount behavior' (Ask for amount), 'Active' (checked), 'Track' (checked), 'Can refund' (checked), 'Affect deposit' (checked), 'Print check on close' (checked), 'Open drawer on close' (checked), 'Print signature line' (checked), 'Combine on check' (checked), 'Close check upon payment' (checked), and 'Do not verify amount' (checked). The 'Overpayment' section has 'Allow overpayment' (checked), 'Auto fix balance without prompt' (checked), and 'Provide change' (checked). The 'Tips' section has 'Allow tips' (checked), 'Maximum tip %' (999.00), 'Tip refund %' (0.000000), and 'Remove tip line if auto gratuity' (checked).

Figure 12 Tender Maintenance, Deposit Tender, Tender Tab

3. Under the 'Settings' group bar, type a **name**, such as Deposits, 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.

## Specifying POS tenders available for deposits in Aloha Takeout

The Tenders tab in Takeout Settings allows you to specify the Aloha POS system tenders available to apply to future deposits in Aloha Takeout. Adding POS tenders on this tab provides the linkage between Aloha Takeout and the POS reporting structure.

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

Tender Type	Tender Id	Available for deposits	Description
Amex	Amex (Tip)	<input checked="" type="checkbox"/>	
Cash	Cash	<input 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"/>	

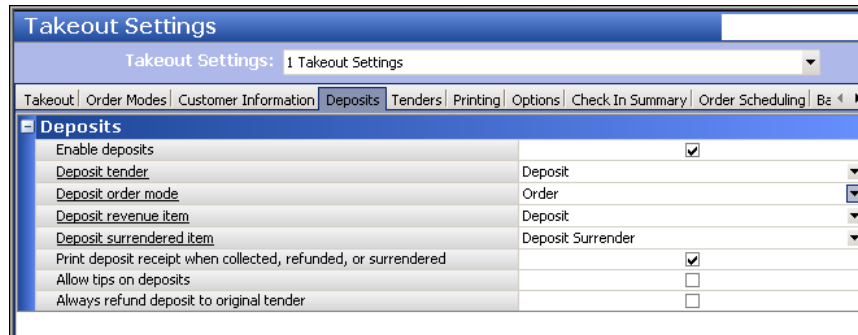
Figure 13 Takeout Settings, Tenders Tab

2. Under the 'Tender Types' group bar, 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 you want the tender to appear on the FOH Deposits screen.
5. Type the **text** to appear on the button in 'Description.'
6. Repeat this **procedure** for each tender you want to accept as a deposit in Aloha Takeout.
7. Click **Save**.

## Configuring deposits for use with ATO future orders

After creating tenders for use with deposits, you must configure Aloha Takeout to enable the use of deposits.

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



Takeout Settings	
Takeout Settings: 1 Takeout Settings	
Takeout   Order Modes   Customer Information   Deposits   Tenders   Printing   Options   Check In Summary   Order Scheduling   Be	
<b>Deposits</b>	
Enable deposits	<input checked="" type="checkbox"/>
Deposit tender	Deposit
Deposit order mode	Order
Deposit revenue item	Deposit
Deposit surrendered item	Deposit Surrender
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 14 Deposit Tab

2. Under the 'Deposits' group bar, 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.

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

**Note:** As a best practice, we recommend a separate, non-Aloha Takeout order mode, with no surcharges configured.

5. Select the **item** specifically created for adding a deposit to a guest check from the 'Deposit revenue item' drop-down list.
6. Select the **item** specifically created for surrendering a deposit due to canceled orders from the 'Deposit surrendered item' drop-down list.

7. Select **Print deposit receipts when collected, refunded, or surrendered** to print a guest check any time you complete an activity related to deposits.
8. Click **Save** and exit the **Takeout Settings** function.



The image shows a printed receipt titled "New Deposit". It contains the following information:

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

Sandwich Shop  
3925 Brookside Pkwy

Host: Aloha 11/13/2008  
Paul Langenhahn 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 15 Printed Deposit Receipt Example

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.

## Providing the ability to refund and surrender deposits

With Aloha Takeout, you configure which Aloha POS access levels can authorize a deposit refund and surrender deposits.

1. Select **Maintenance > Labor > Pos Access Levels**.
2. Select an **access level** from the drop-down list.

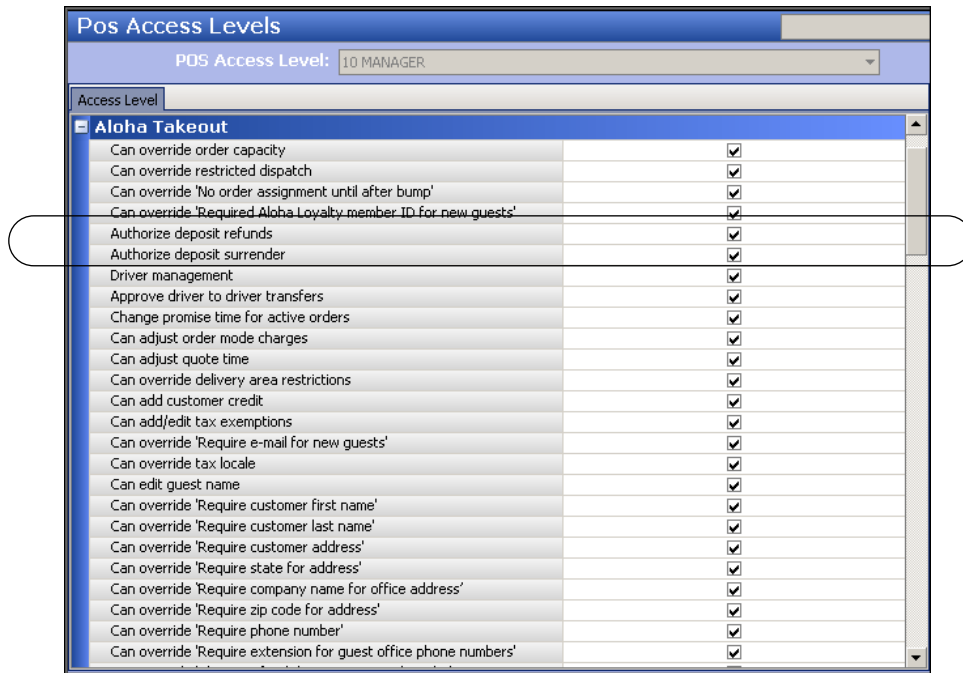


Figure 16 Authorize Deposit Refunds and Surrender

3. Under the 'Aloha Takeout' group bar, select **Authorize deposit refunds**.
4. Click **Save**.
5. Repeat for each **access level** that can refund and surrender a deposit.
6. Exit the **Pos Access Levels** function.

## Providing the ability to start a future order

There are several methods you can configure and use to start a future order. You can speed up your order entry process by starting a future order from the express entry screen as you enter the guest information. You can configure all of them, or just one, to limit the training needed to start a future order.

### To configure the starting of future orders from the express entry screen:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Panel Options** tab.
2. Select the **Express Entry** tab located in the middle of the screen.

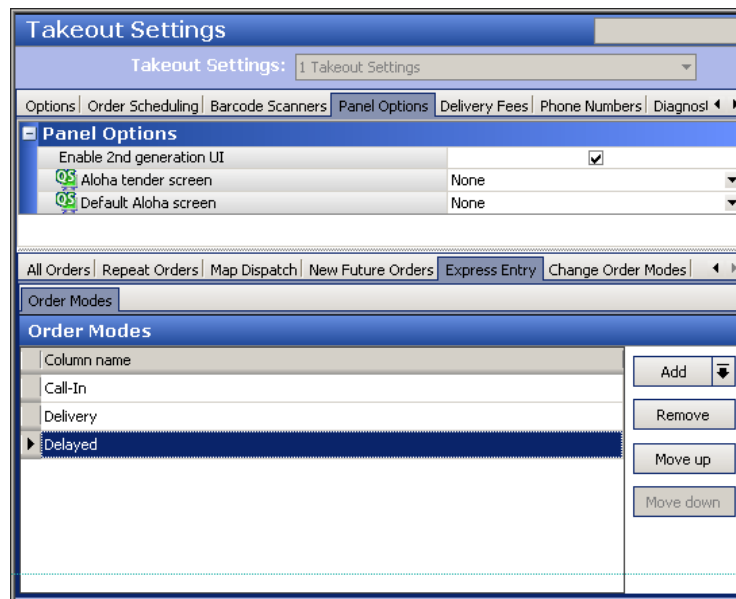


Figure 17 Takeout Settings - Panel Options Tab

3. Under the 'Order Modes' group bar, click the **Add drop-down arrow**, select **Delayed**, and click **OK**.
4. Click **Save** and exit the **Takeout Settings** function.



## Defining the order modes available on the Delayed Order Information screen

You use the Delayed Order Information screen to select a calendar date and time for a future order. Use the New Future Orders tab to add the order modes available on the screen. In previous versions, you had to define the order modes using the FutureOrderModeButtons.xml file.

**To define the order modes available on the Delayed Order Information screen:**

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Panel Options** tab.
2. Select the **New Future Orders** tab located in the middle of the screen.

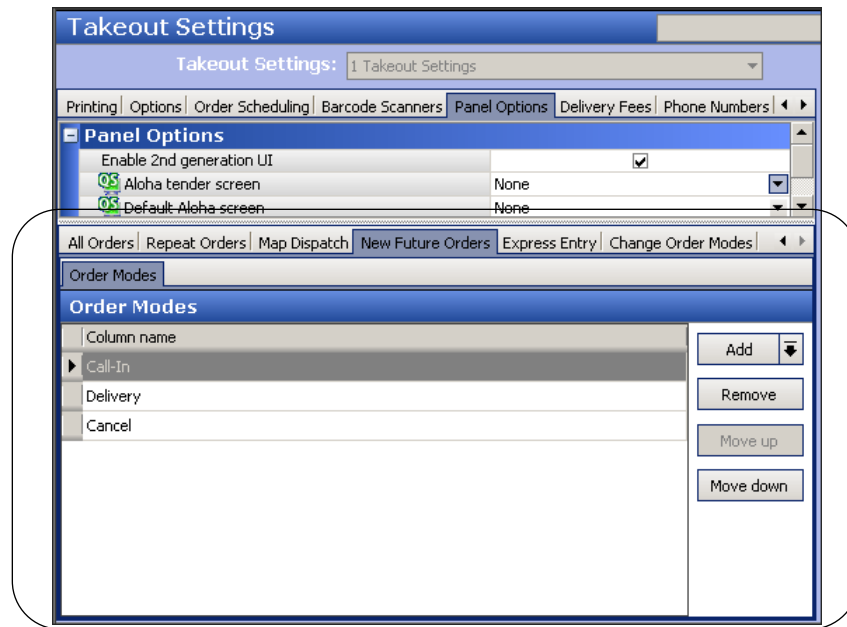


Figure 18 Takeout Settings - Panel Options Tab

3. Under the 'Order Modes' group bar, click the **Add drop-down arrow**, select an **order mode** to make available, and click **OK**.
4. Repeat **step 3** to add other order modes you want available on the Delayed Order Information screen.
5. Click **Save**.

## Configuring the printing requirements for ATO future orders

You can enable Aloha Takeout to print a Future Order Statement to give to the guest when you place the order, or for any other reason, such as a store copy. You can optionally include the delivery zone on the statement.

### To configure the printing requirements for a future order:

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

Takeout Settings	
Takeout Settings: 1 Takeout Settings	
Takeout   Order Modes   Customer Information   Deposits   Tenders   <b>Printing</b>   Options   Check In Summary   Order Scheduling   Be	
Print zone on Aloha receipt	<input type="checkbox"/>
Print zone on bag chit	<input type="checkbox"/>
Print zone on future order statement	<input checked="" type="checkbox"/>
Print zone on order manifest	<input type="checkbox"/>
Print zone on item manifest	<input type="checkbox"/>
Print zone on driver itinerary	<input type="checkbox"/>
Print order history count on itinerary and receipt	<input checked="" type="checkbox"/>
Print order items receipt count	0
Apply payment receipt count	0
Promise time label	Promise Time
Promise date label	Promise Date
Add-on chit header label	Add On
Chit header printing	Print chit header at top of chit
Receipt header printing	Print receipt header at top of receipt
Print guest notes on kitchen chit	<input checked="" type="checkbox"/>
Print chit on final bump	<input type="checkbox"/>
Print change chit when order cancelled or mode changed	<input type="checkbox"/>
Include unavailable items on kitchen chit	<input checked="" type="checkbox"/>
Unavailable item indicator	None
Enable future order statement	<input checked="" type="checkbox"/>

Figure 19 Takeout Settings - Printing Tab

2. Under the 'Printing' group bar, select **Print zone on future order statement** to print the delivery zone on the Future Order Statement.
3. Select **Enable future order statement** to provide the ability to print the Future Order Statement.
4. Click **Save**.

## Purging expired ATO future orders at end-of-day

Based on the nature of how Aloha Takeout operates, a future order typically releases and is sent to the kitchen based on the promise time. With guests ordering from a mobile app becoming the norm in the restaurant industry, you can configure the system so that a future order does not release to the kitchen until a 'check in' function occurs, such as beacon technology recognizing the arrival of the guest at your restaurant. The guest does not have a pick up time, and the future order remains in the queue until the guest arrives. The possibility exists that the guest may not show up; the order then remains in the queue indefinitely and never releases to the kitchen. When the system purges the future order, the order changes to an expired state in the historical order table of the ATO SQL database.

**To configure the purge of unreleased future orders at end-of-day:**

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

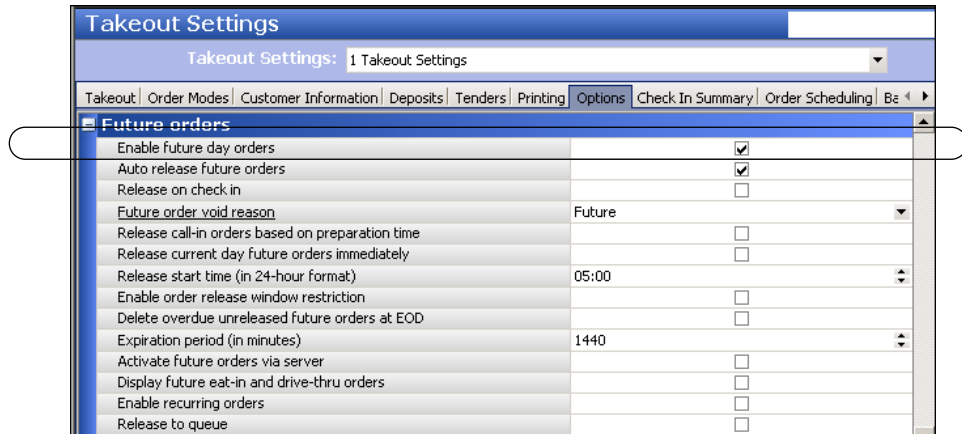
The screenshot shows the 'Takeout Settings' window with the 'Options' tab selected. The 'Future orders' section is expanded, and the 'Delete overdue unreleased future orders at EOD' option is checked. The 'Expiration period (in minutes)' is set to 1440. Other options include 'Enable future day orders', 'Release call-in orders based on preparation time', 'Release current day future orders immediately', 'Release start time (in 24-hour format)', 'Enable order release window restriction', 'Activate future orders via server', 'Display future eat-in and drive-thru orders', 'Release to queue', and 'Select release queue based on check in'. The 'Invoicing' section is also expanded, showing settings for item counts, auto-save invoice, include item modifiers, and use counter-based invoice number. The 'Kitchen integration' section is expanded, showing the 'Enable Kitchen interface' option.

Figure 20 Takeout Settings > Options Tab

2. Under the 'Future orders' group bar, select **Delete overdue unreleased future orders at EOD** to enable the next End-of-Day process to purge any unreleased future orders that were not sent to the kitchen before the expiration period.
3. Type the number of **minutes** before a future order expires in 'Expiration period (in minutes)' to define the number of minutes at which a future order reaches an expired state after a guest fails to check in to pick up the order. The default value is 1440 minutes. The system adds the expiration minutes to the order time to determine if an open future order is expired. If yes, the next End-of-Day process purges the order, and marks the order as expired, not released.
4. Click **Save**.

## Configuring recurring orders

Aloha Takeout now allows you to accept and schedule recurring orders for customers who desire this capability. The system uses the terminology of “patterns” to establish as well as manage recurring orders for a customer. A recurring order is considered a series of future orders.



Takeout Settings		
Takeout Settings: 1 Takeout Settings		
Takeout   Order Modes   Customer Information   Deposits   Tenders   Printing   Options   Check In Summary   Order Scheduling   Back		
<b>Future orders</b>		
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 checked="" type="checkbox"/>
Release to queue		<input type="checkbox"/>

Figure 21 Future Orders Recurring Orders

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the 'Future orders' group bar, select **Enable recurring orders**.
3. Click **Save**.

## 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 Future Orders and Deposits

This section details how to use future orders, apply and surrender deposits, and manage recurring orders on the Aloha FOH. A future order is an order that occurs any time apart from the present time until five years later. With Aloha Takeout you can create a single future order, as well as a recurring order. A recurring order is a repeat of the same order that occurs using a specific pattern of future dates. Customers can add deposits to both future orders and recurring orders. You manage Future Orders at the Aloha Takeout Future screen, which you access from the Aloha Takeout navigation bar.

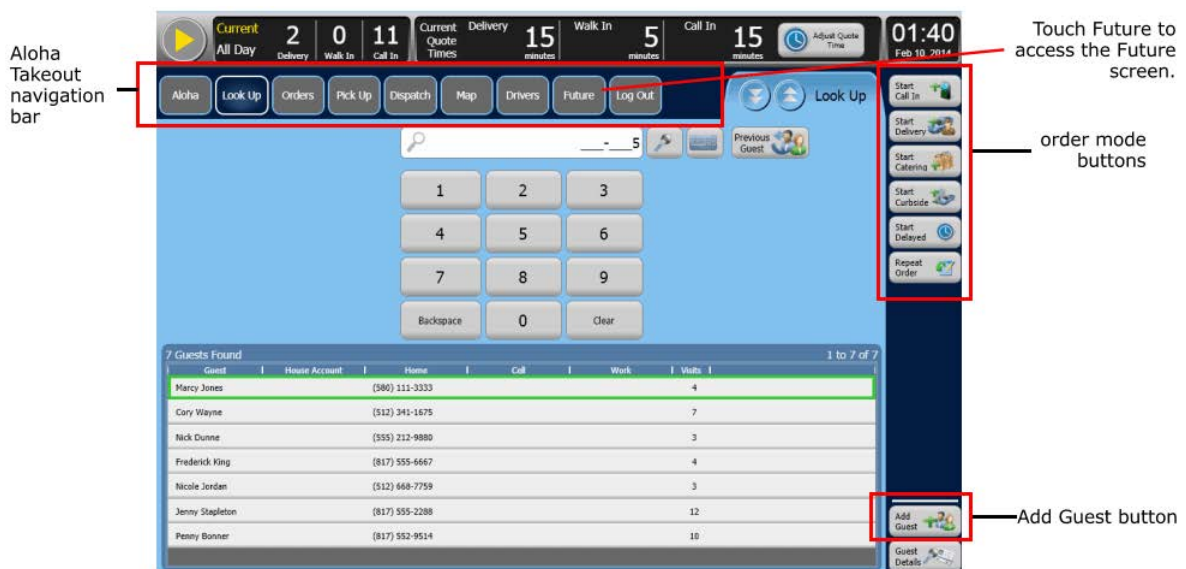


Figure 22 Aloha Takeout FOH Look Up Screen

## Managing ATO future orders

Aloha Takeout allows you to accept future orders. Once you receive an order, you can change the promise time and date, the items or quantities, or cancel the order, if necessary.

## Creating a future order in ATO

When you log in to Aloha Takeout, the Look Up screen appears as the default screen, when configured. Most operations set the Look Up screen as the default screen for order takers. You can start Future Orders from the Look Up screen.

**SCENARIO:** A customer wishes to place an order for a time or date sometime in the future. The order can be for later today, next week, or up to five years later.

1. Start a **future order** in one of three ways:

Select a **customer** or **add a new guest** from the Look Up screen and then touch **Start Delayed** on the right side of the screen.

-OR-

Touch **Promise Time** at the Order Confirmation screen.

-OR-

Select a **time slot** and touch **Schedule New Order** at the Future screen.

-OR-

Select **Delayed** at the express entry screen.

The Delayed Order Information screen appears.

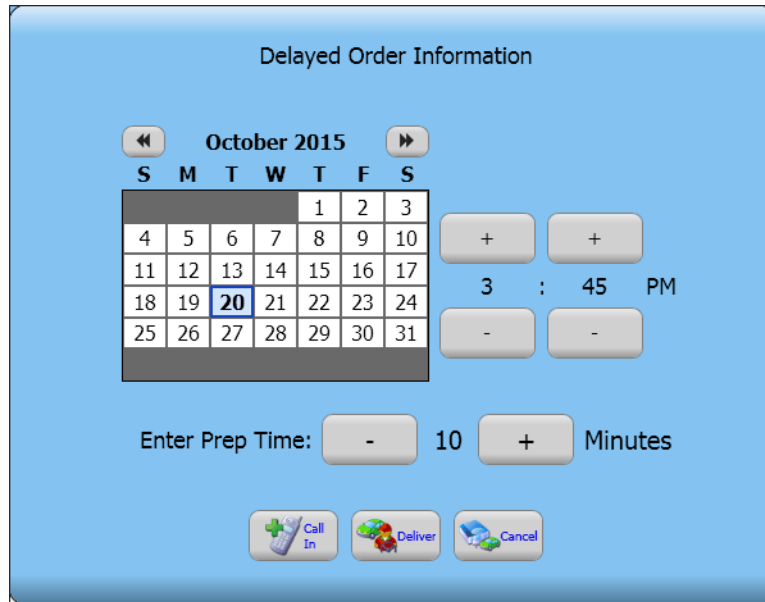


Figure 23 Delayed Order Information Screen

2. Select a **calendar date** and **time** for the order. You can use the right and left arrows to move to a different month.
3. Use the '+' and '-' buttons to adjust the **promise time** and the **prep time**, if necessary.
4. Touch the desired **order mode**.

## Finding a future order

**SCENARIO:** SCENARIO: A customer wants to change or cancel a future order.

1. Touch **Future** on the navigation bar to access the Future screen.

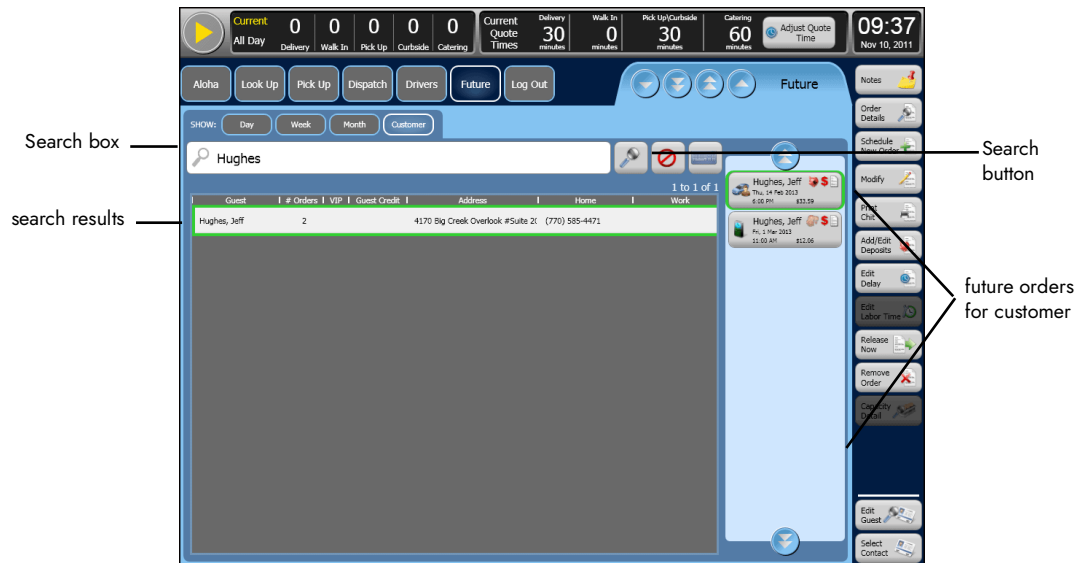


Figure 24 Customer Search

2. Using the Show filter button, touch **Customer** to filter the list by customer name.
3. Type the **customer name** or **phone number** in the search text box.
4. Touch the **magnifying glass** to search for the customer or touch the unavailable button to clear the name in the search field.
5. Select the **customer** from the search results and the future orders for the customer appear on the right side of the Future screen.

## Printing a future order statement

For a customer that desires a confirmation of their order, you can print a statement or a chit to give to them; however, you cannot print a receipt for the customer since the order has not yet been released.

1. Select the **order** for the customer. See ["Finding a future order" on page 31](#).
2. Touch **Order Details**.

3. Touch **Print Statement** to print a statement with prices, or touch **Print Chit** to print a statement without prices.

Future Order Statement	
Stephen Barker	10/25/2016
Print:	4:16 PM
***** Customer Information *****	
John Doe (555) 555-5555	
***** Order Information *****	
Call In	
Promise Date: 10/28/2016	
Promise Time: 4:40 PM	
Order Date: 10/25/2016	
***** Order *****	
Sandwich	\$9.00
Subtotal	\$9.00
Tax	\$0.00
Total	\$9.00

### Editing the items or quantity of a future order

**SCENARIO:** SCENARIO: A customer wants to make changes to a future order they have already placed with you.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order**. See ["Finding a future order" on page 31](#).
3. Touch **Modify**.
4. At the 'Future orders cannot be tendered. Do you want to modify this order?' screen, touch **Yes**.
5. Modify the **items** and/or **quantity** of the order according to the request.
6. Touch the **button** that returns you to the Future screen.
7. Confirm the **order** at the Order Confirmation screen.



## Editing the promised date or time of a future order

**SCENARIO:** SCENARIO: A customer scheduled a future order for Thursday at 12:00 noon and now wants to change the order to Friday at 5:00 p.m. To edit the promised date or time of a recurring order, touch 'Edit Recurrence.'

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order**. See ["Finding a future order" on page 31](#).
3. Touch **Edit Delay** on the right side of the screen. The Delayed Order Information screen appears.

The image shows the 'Delayed Order Information' screen. At the top, it says 'Delayed Order Information'. Below that is a calendar for December 2013. The calendar has days of the week (S, M, T, W, T, F, S) and dates (1 through 31). The date 13 is highlighted. To the right of the calendar is a time picker showing '5 : 00 PM'. Below the calendar is a section for 'Enter Prep Time:' with a minus button, the number '10', a plus button, and the word 'Minutes'. At the bottom are two buttons: 'Call In' and 'Walk In'.

Figure 25 Delayed Order Information Screen

4. Use the **right** and **left arrows** to move to and select the **desired date**.
5. Use the '+' and '-' buttons to adjust the **promise time** and **prep time**, if necessary.
6. Touch the desired **order mode**.

## Viewing ATO future orders on FOH

**SCENARIO:** SCENARIO: You want to quickly view all future orders without having to run a BOH Future Orders report. From a FOH terminal, you can view future orders for a specific day, week, month, or even for a specific customer.



Figure 26 Future Order FOH Screen

1. Touch **Future** on the navigation bar to access the Future screen.
2. Using the Show filter button, select **Day, Week, or Month** to view future orders for a selected time period.
3. Select the **specific time frame** for the future orders you want to view.

**Note:** To review a specific future order, select the time frame in which the future order falls. Select the order and the order details appear on the right side of the screen.

**Note:** On the ATO BOH, you can also run a number of reports regarding future orders. For more information on these reports, refer to the Aloha Takeout Report Guide.

## Canceling a future order

**SCENARIO:** SCENARIO: A customer previously placed an order for tomorrow with you and now calls to cancel the order. To cancel a recurring order, use the 'Edit Recurrence' button.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** from the Future screen. See ["Finding a future order" on page 31](#).
3. Touch **Remove Order** on the right side of the screen.
4. If the order does not have any applied deposits, at the 'Are you sure you want to remove this future order?' prompt, touch **Yes**.

-OR-

If the order does have applied deposits, at the 'Are you sure you want to remove the future order? If so, this order has deposits that need to be either refunded or surrendered,' prompt, touch **Yes**. See ["Refunding or surrendering a deposit" on page 37](#).

## Managing deposits

You can use the Deposits feature to collect partial or full payment from customers for a future order. When the customer arrives to pick up their order, or when you assign the order to a driver, it is necessary to apply any deposits you previously accepted for the order to the order before performing any other functions. You can also refund or surrender deposits, as necessary.

## Accepting a deposit

Deposits allow you to collect partial or full payment from customers for a future order. You can also add a deposit for a future order while on the Order Confirmation screen, to eliminate the need to first confirm the order and then navigate back to the order to add the deposit.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** for which you want to accept a deposit from the Future screen. See ["Finding a future order" on page 31](#).

3. Touch **Add Deposits** on the right side of the screen. The Deposit Information screen appears.

Deposit Information for Lynne James

Add Deposit   Refund Deposit   Surrender Deposit

Tenders

Cash   \$ 0.00

Visa

Amex

Discover

Master card

7 8 9

4 5 6

1 2 3

0 Clear

Add Deposit

Exit

CajunChik Sand	\$6.95
Chips	\$0.00
Chik Parm Sand	\$6.25
Chik Parm Sand	\$6.25
Chik Parm Sand	\$6.25
Chik Parm Sand	\$6.25
Chik Parm Sand	\$6.25
Chik Parm Sand	\$6.25
SantaFe Sand	\$6.95
Chips	\$0.00
ChikSal Sand	\$5.95
Chips	\$0.00
Greek Salad	\$5.95
Delx Greek Sal	\$6.95
Singapore Sal	\$6.95
Oriental Salad	\$6.95
Caesar Salad	\$5.25
Super Caesar	\$6.95
Super Caesar	\$6.95
Cajun Caesar	\$6.95
Herb Chik Sal	\$6.95
Tax:	\$8.20
Call In Fee:	\$0.00
Total:	\$125.40
Balance:	\$125.40

Figure 27 Deposit Information Screen

4. Touch the **appropriate tender button** based on how the customer is paying for the deposit. If you select Cash, the deposit appears on the check on the left side of the Deposit Information screen. You are accountable for this amount in your checkout.
5. Enter the **deposit value** using the numeric keypad.
6. Touch **Add Deposit**. If the customer is paying with a payment card, the Enter Payment Information screen appears.

Enter Payment Information

Account Number:

Expiration Date:  (MMYY)

☐ Save card info to customer's profile

No credit card on file for customer

7 8 9 BACKSPACE

4 5 6 CLEAR

1 2 3 ENTER

0

OK Cancel

Figure 28 Enter Payment Information screen

7. Enter the **card information** or select **Use credit card on file**, if the card is already present in the system. (Note: If the card is not present, touch 'Save card info to customer's profile' to store and encrypt the customer's credit card information in the customer profile.)

8. Touch **OK**. After the system approves the credit card payment, the deposit appears on the check on the left side of the Deposit information screen.
9. Touch **Exit**.

### Applying a deposit

When the customer who made a deposit arrives to pick up their order, or when you assign an order for which a deposit was made to a driver, you must first apply that deposit to the released order before performing any other functions. You can also add a deposit for a future order while on the Order Confirmation screen, to eliminate the need to first confirm the order and then navigate back to the order to add the deposit.

1. Locate and select the **released order**.
2. Touch **Apply Payment** on the right side of the screen. The system locates all deposits the customer paid, applies them to the check, and displays a message indicating the deposit has been applied to the order.
3. Tender any **remaining balance**.
4. Close the **order** as normal.

 **Note:** The system applies payments in the following order: 1) deposits, 2) credits, and 3) stored payment card.

### Refunding or surrendering a deposit

In accordance with your company policy, you can refund a deposit to a customer or you can surrender the deposit to compensate your organization for labor and/or food costs. When a customer cancels an order with a deposit attached, the system forces you to either refund or surrender the deposit before allowing you to cancel the order.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** for which you want to refund or surrender a deposit from the Future screen. See [“Finding a future order” on page 31](#).

3. Touch **Add/Edit Deposits** on the right side of the screen.

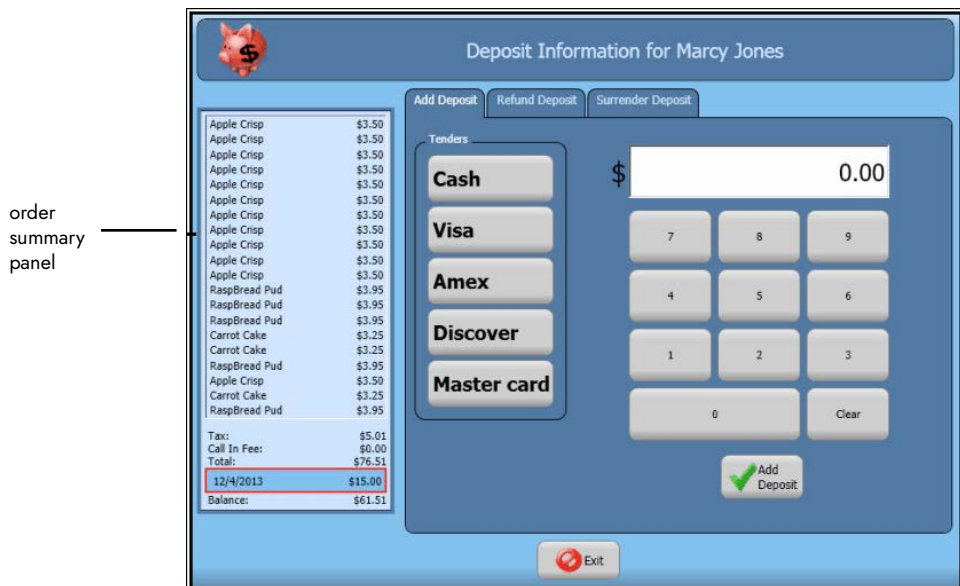


Figure 29 Deposit Line

4. At the Deposit Information screen, select the **Deposit line** in the order summary panel. A red box appears around the selected Deposit line.
5. If refunding a deposit, select the **Refund Deposit** tab and perform the following steps; otherwise skip to step 6.

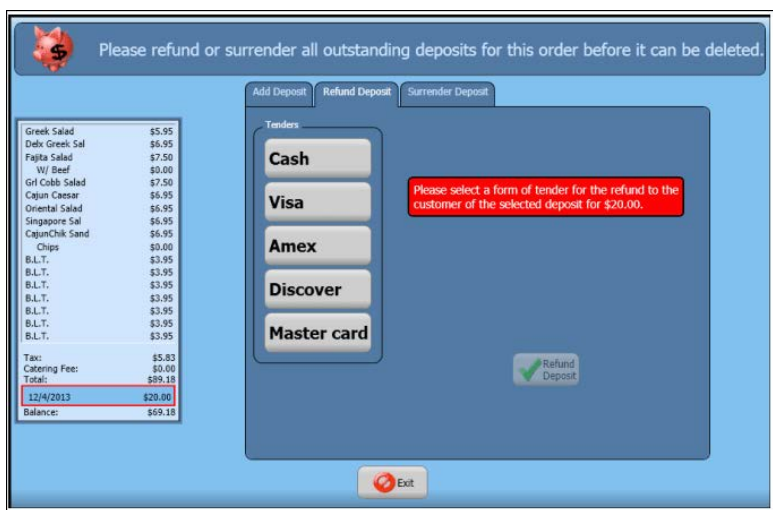


Figure 30 Deposit Refund Prompt

- a. Select the **appropriate tender** to use for the refund. In most cases, this will match the tender used to pay for the deposit. If you refund to a payment card, enter the payment card information.

- b. At the 'Do you wish to refund the selected deposit to the customer as?' screen, confirm the **tender** is correct and touch **Refund Deposit**.
  - c. Obtain **authorization**, if necessary. An employee with the ability to refund a deposit must authorize this transaction.
  - d. Touch **Exit**.
6. If surrendering a deposit to the store, select the **Surrender Deposit** tab and perform the following steps:

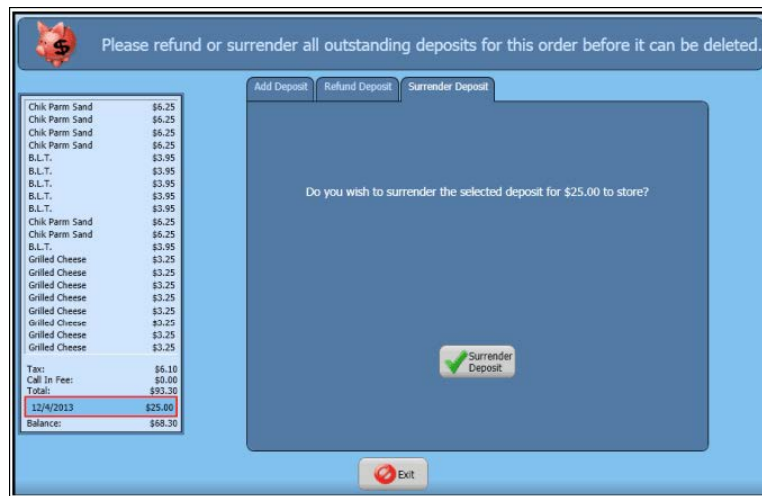


Figure 31 Deposit Surrender Prompt

- a. At the 'Do you wish to surrender the selected deposit to store?' screen, touch **Surrender Deposit**. The system applies the Deposit tender to the check and closes the check.
- b. Obtain **authorization**, if necessary. An employee with the ability to surrender a deposit must authorize this transaction.
- c. Touch **Exit**.

## Managing recurring orders

Aloha Takeout allows you to accept, schedule, and manage recurring orders for customers. The system uses the terminology of 'patterns' to manage recurring orders. You can create a recurring order, cancel an instance of a recurring order, change the pattern of the occurrence, and modify the items and quantities for a particular instance of the recurring order.

### Creating a recurring order in ATO

**SCENARIO:** SCENARIO: A customer wishes to create the same order for every single Wednesday for the next year without having to call you each week to request the order.

1. At the Look Up screen, select a **customer** for the recurring order by either adding a new customer or choosing an existing customer.
2. Select an **order mode**.
3. Enter the **items and quantities** for the order.

Order Confirmation

Back to Aloha Edit Guest

Nick Dunne

Gourmet Brgr  
Medium  
BleuChez Brgr  
Medium  
ChezBrgr  
Medium  
Cheddar  
Hamburger  
Medium  
Bacon  
Avocado

Order Mode: Call In  
Promise Time: 1:45 PM  
Phone Number: (555) 212-9880  
Notes:

Sub Total: \$26.55  
Tax: \$1.86  
Total: \$28.41

Cash Credit Prepaid Recurring

Recurring button

Figure 32 Order Confirmation Screen



4. At the Order Confirmation screen, touch **Recurring**. The Recurring Order screen appears.

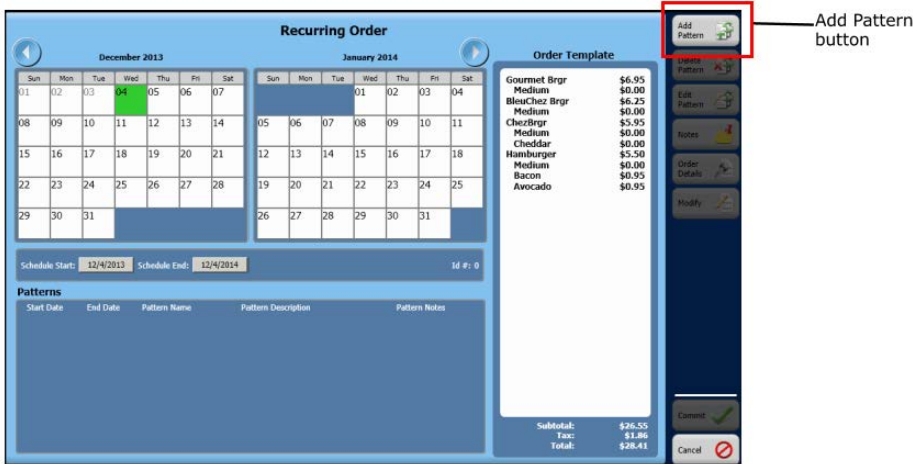


Figure 33 Recurring Order Screen

5. Touch **Add Pattern**. When you create a new recurring order, the only available option is Add Pattern. All other options, such as Delete Pattern, Edit Pattern, and Notes are not available. The Schedule Pattern Wizard screen appears.

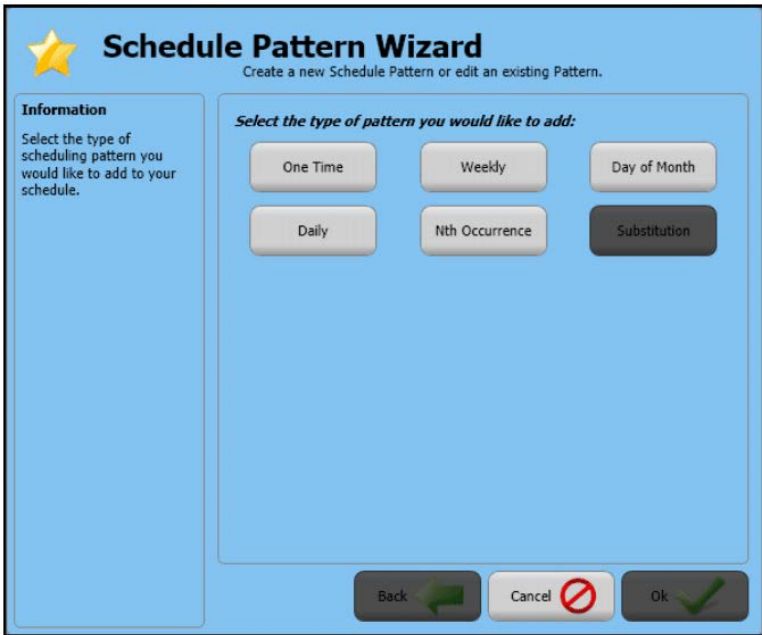


Figure 34 Schedule Pattern Wizard

6. Select the **pattern** for the recurring order and a screen specific to the pattern you choose appears.

One Time — Allows you to add or remove a single order from your schedule.

Weekly — Allows you to add an order for a specific day of the week as well as set how often the order should repeat.

Day of Month — Allows you to add an order for a specific day of the month as well as set how often the order should repeat.

Daily — Allows you to add an order which will repeat every day or every few days as well as when the recurring order should start and end.

Nth Occurrence — Allows you to add an order on a specific week of the month as well as the weekday of the week, such as the third Wednesday of the month. You can also determine how often the order should repeat and when the recurring order should start and end.

Substitution — 'allows you to substitute an order occurring on a day with an order which will occur on another future day. This button remains unavailable until you schedule a recurring order for the customer.

The screenshot shows the 'Schedule Pattern Wizard' window. It has a blue header with a yellow star icon and the title 'Schedule Pattern Wizard'. Below the title is the subtitle 'Create a new Schedule Pattern or edit an existing Pattern.' The window is divided into two main sections. The left section is titled 'Information' and contains text explaining the 'Weekly' pattern: 'The "Weekly" pattern will let you add an order on a specific day of the week and also set how often the weekly order should repeat itself. Select the Start and End dates, how often the order should repeat, and on which day of week the order should occur.' The right section is titled 'Weekly' and contains several input fields and buttons. It has 'Starting on' (12/4/2013) and 'and continuing until' (11/20/2014) fields. Below these are 'occurring every' (1) and 'week(s)' fields. There are also 'on' (Wednesday) and 'day(s)' fields. At the bottom of the right section is a 'Notes' area with a text box and a 'Print' button. At the very bottom of the window are three buttons: 'Back' (with a green arrow), 'Cancel' (with a red X), and 'Ok' (with a green checkmark).

Figure 35 Schedule Pattern, Weekly Recurring Order

7. Select a **starting** and **ending date**, as well as other options for the particular pattern.

**Note:** Any information you enter into the 'Notes' section of the Schedule Pattern Wizard screen appears on all associated recurring orders.

8. Touch **Ok**.

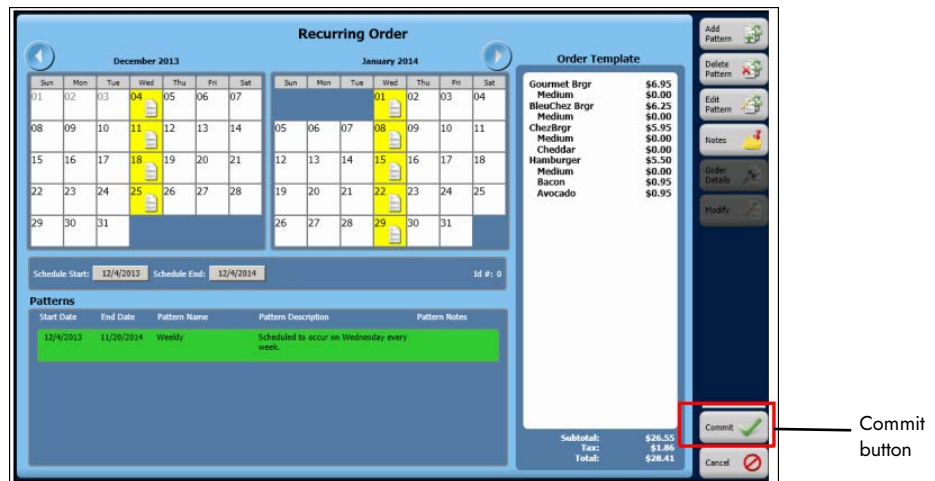


Figure 36 Recurring Order with Weekly Pattern

**Note:** At the Recurring Order screen, when you select a recurring order from the patterns box, the recurring order appears in green on the patterns box and the associated orders appear in yellow, along with an order icon.

## Removing an instance of a recurring order

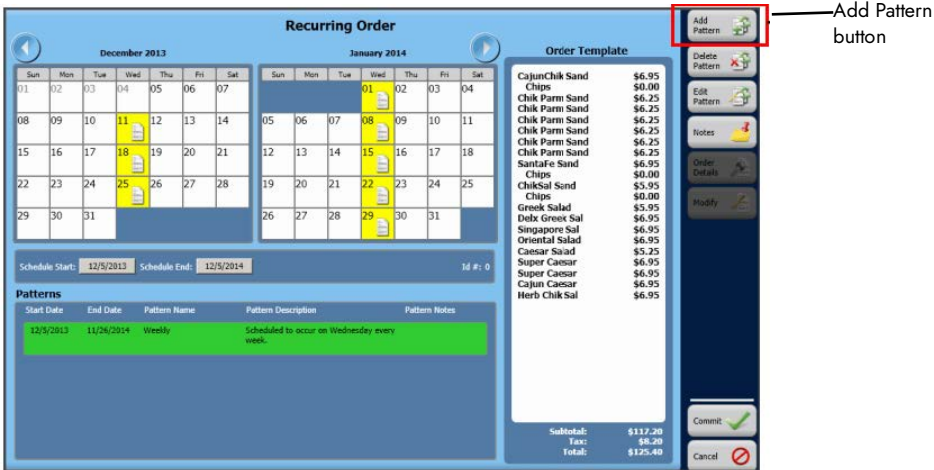
With Aloha Takeout, you can remove an instance of a recurring order without canceling the entire recurring order. To accommodate the request, use the 'Add Pattern' feature.

**SCENARIO:** SCENARIO: A customer with a weekly recurring order for every Wednesday does not want the order for a particular Wednesday.

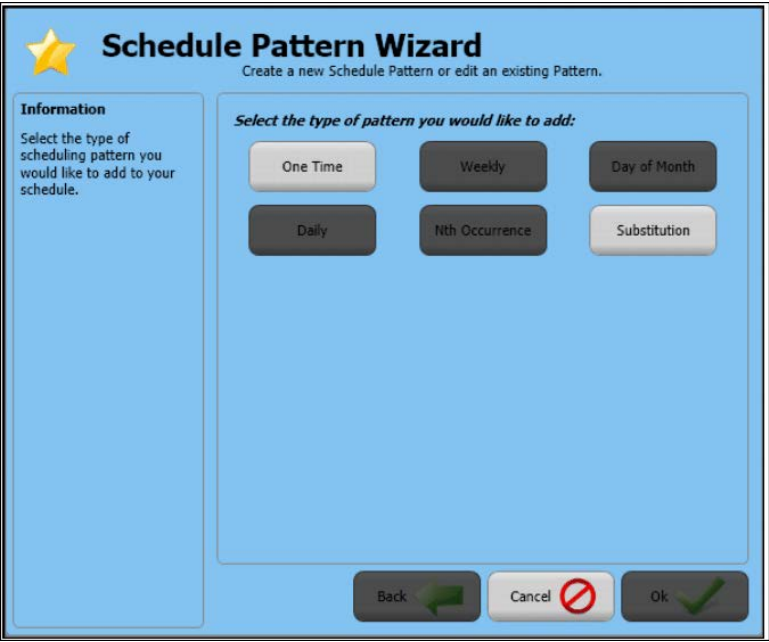
**Note:** Do NOT use the 'Delete Pattern' function to remove a single occurrence of a recurring order. The 'Delete Pattern' function removes all recurring orders within the pattern.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** for which you want to remove an instance of a recurring order. See ["Finding a future order" on page 31](#).

3. Touch **Edit Recurrence** on the right side of the screen. The Recurring Order screen appears.



4. Touch **Add Pattern** on the right side of the screen. The Schedule Pattern Wizard screen appears.



5. Touch **One Time**.

**Schedule Pattern Wizard**  
Create a new Schedule Pattern or edit an existing Pattern.

**Information**  
The "One Time" pattern will let you add or remove a single order from your schedule. Select the date and then choose whether you want to Add or Remove the order.

**One Time**  
Occurring one time on 12/25/2013  
Add Order Remove Order

**Notes**

Back Cancel Ok

Figure 39 Schedule Pattern Wizard - One Time

6. Touch the **date button** that follows the 'Occurring one time on' prompt.
7. Use the left and right arrows to select the **instance** of the recurring order to remove and touch **Ok** to return to the Schedule Pattern Wizard screen.
8. Touch **Remove Order** on the right side of the screen. A confirmation appears.

9. Touch **Ok**. After touching 'Ok,' a red 'X' appears on the date selected and the system adds a new pattern.
10. Touch **Commit** on the right side of the screen.



Figure 40 Recurring Order Removed

## Canceling a recurring order

**SCENARIO:** SCENARIO: A customer wishes to cancel all recurring orders in a pattern. You can easily do this at the Recurring Order screen.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** you wish to cancel from the Future screen. See ["Finding a future order" on page 31](#).
3. Touch **Edit Recurrence** on the right side of the screen.

- At the Recurring Order screen, under the Patterns box, select the **recurring order** you want to cancel. Remember, this cancels all instances of a recurring order.



Figure 41 Recurring Order Screen

**Note:** The recurring order appears in green in the Patterns box.

- Touch **Delete Pattern** on the right side of the screen.

**Note:** Once you select Delete Pattern, the system deletes all instances of the recurring order. A confirmation screen does not appear.

- Touch **Commit** on the right side of the screen.

### Editing the pattern of a recurring order

**SCENARIO:** SCENARIO: A customer with a recurring order that takes place every Wednesday contacts you and wishes to change the order to occur every other Thursday. Instead of deleting the existing pattern and creating a new one, you can edit the existing pattern to accommodate the request.

- Touch **Future** on the navigation bar to access the Future screen.
- Find and select the **order** for which you want to edit the recurrence from the Future screen. See [“Finding a future order” on page 31](#).
- Touch **Edit Recurrence** on the right side of the screen.
- At the Recurring Order screen, select the **pattern** you wish to edit.

5. Touch **Edit Pattern** on the right side of the screen. The Schedule Pattern Wizard screen appears.

**Schedule Pattern Wizard**  
Create a new Schedule Pattern or edit an existing Pattern.

**Information**  
The "Weekly" pattern will let you add an order on a specific day of the week and also set how often the weekly order should repeat itself. Select the Start and End dates, how often the order should repeat, and on which day of week the order should occur.

**Weekly**  
Starting on 12/9/2013 and continuing until 12/9/2014  
occurring every 2 week(s)  
on Thursday

**Notes**

Back Cancel Ok

Figure 42 Schedule Pattern Wizard

6. Use the '-' or '+' to make the **necessary changes** to the pattern. (In the scenario example, you would change the **number** in 'occurring every' to 2 and change the **day** in 'on' to Thursday.)



7. Touch **Ok**.

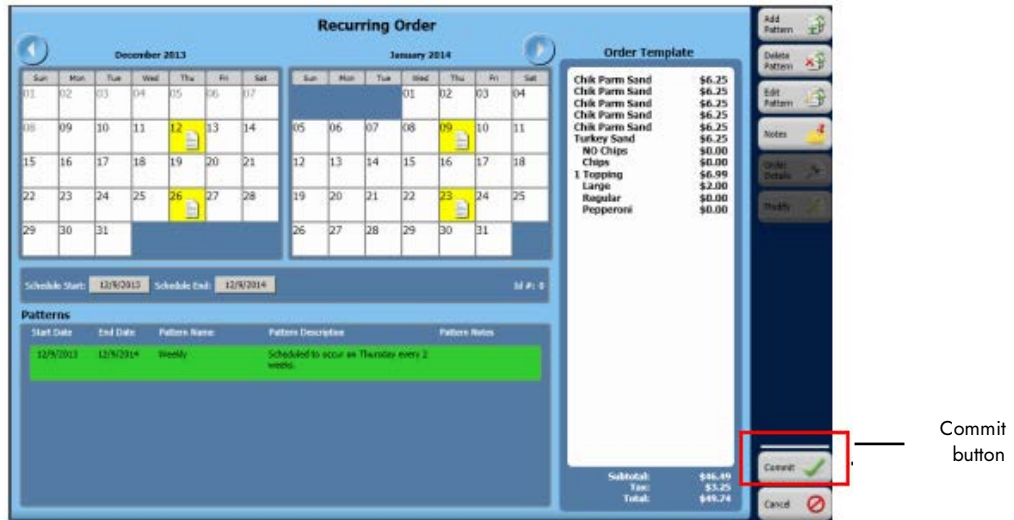


Figure 43 Recurring Order, Edited Pattern

8. Touch **Commit**.

**Note:** In the Recurring Order screen, the dates of the recurring order and the order icon now appear according to the edited pattern.

## Modifying the items in an instance of a recurring order

**SCENARIO:** SCENARIO: A customer with a recurring order wishes to change the items and quantity for an order on a particular date. It is necessary to select the recurring order, modify the items in the order, and then choose the specific instance.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** for which you want to modify the items in an instance of the order from the Future screen. See ["Finding a future order" on page 31](#).
3. Touch **Modify** on the right side of the screen. The prompt, 'Future orders cannot be tendered. Do you want to modify this order?' appears.
4. Touch **Yes**.
5. Adjust the **quantity and items** of the order in accordance with the request.
6. Touch the **button** that returns you to the Future screen.
7. At the Order Confirmation screen, touch **Recurring**.

8. At the Recurring Order screen, use the left and right arrows to navigate to the **date** of the modified order.

**Note:** The date appears in green with a red exclamation mark in the date box. The order details appear to the right of the calendar.



Figure 44 Recurring Order Modified

9. Touch **Add Pattern** on the right side of the screen. The Schedule Pattern Wizard screen appears.
10. Confirm the **date** for 'Occurring one time on' is correct and touch **Add Order**.

11. Touch **Ok**.

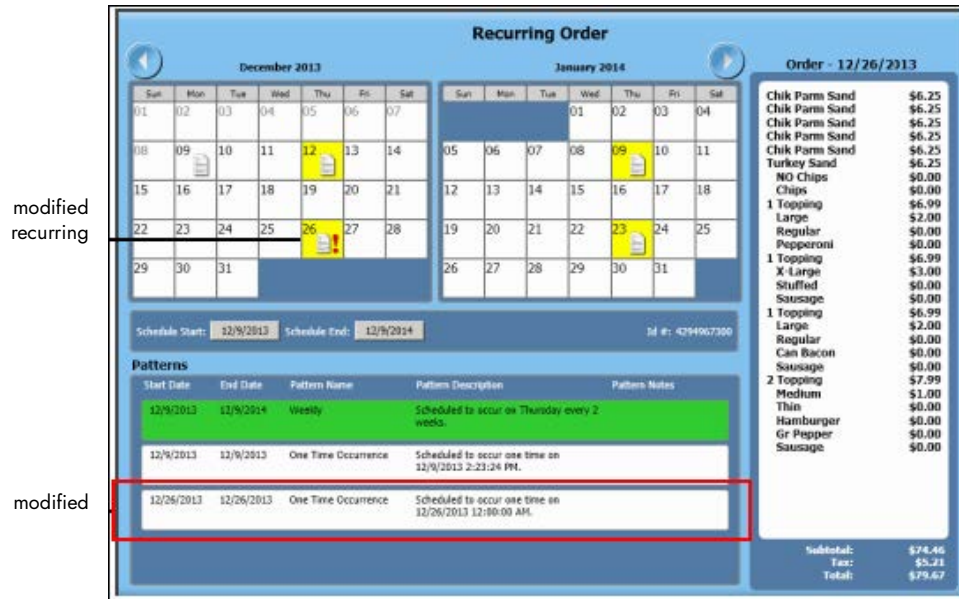


Figure 45 Modified Recurring Order

**Note:** At the Recurring Order screen, the system places a red exclamation mark next to a the modified recurring order. The system also adds a new pattern to the 'Patterns' box.

12. Touch **Commit**.

### Changing the date for one instance of a recurring order

**SCENARIO:** SCENARIO: A customer with a recurring order for every Thursday wishes to change the order for one week from Thursday to Tuesday. You can accommodate the customer's request without re-entering the entire order. It is necessary to add a pattern for the one new instance of the order and a second pattern to cancel the old instance of the order.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** on the date for which you want to change the instance of the recurring order. See ["Finding a future order" on page 31](#).
3. Touch **Edit Recurrence** on the right side of the screen.
4. Touch **Add Pattern** on the right side of the screen to add a date for the new instance of the order. The Schedule Pattern Wizard screen appears.
5. Touch **One Time**.
6. Touch the **date button** that follows the 'Occurring one time on' prompt.
7. Use the left and right arrows to select the date on which to add the new **instance** of the recurring order and touch **Ok** to return to the Schedule Pattern Wizard screen.
8. Touch **Add Order** on the right side of the screen.

9. Touch **Ok**.

**Note:** The system places an order icon and a red exclamation mark on the new desired date. This only adds the new order. You still need to remove the order you are replacing.



Figure 46 Recurring Order Screen

10. Touch **Add Pattern** on the right side of the screen, to select the instance of the order you want to remove. The Schedule Pattern Wizard screen appears.
11. Touch **One Time**.
12. Touch the **date button** that follows the 'Occurring one time on' prompt.
13. Use the left and right arrows to select the **date** on which the instance of the recurring order to remove occurs and touch **Ok** to return to the Schedule Pattern Wizard screen.
14. Touch **Remove Order** on the right side of the screen.

15. Touch **Ok**. (A red exclamation 'X' appears over the order icon on the date selected.)



Figure 47 Recurring Order Changed

## 16. Touch **Commit**.

## Reporting Future Orders and Deposits

Aloha Takeout has two reports for future orders.

- The Future Orders report displays the details for future orders in the system for the date range selected. The contact information for the customer prints above the order. You define the information to include on the report. You can choose to have individual orders print on separate pages.
- The Future Order Item Summary report displays a summary of items on order for a future date. This report allows you to see the items you need so that you can ensure you have enough product to produce the scheduled orders or that you have sufficient time to produce the ordered items. For example, in a restaurant where food may take longer to prepare, use this report to identify how many items to prepare in advance. Additionally, you can configure the report to show any item modifiers on order with the ordered items.



**Reference:** Refer to the Aloha Takeout Report guide for more information on the Future Orders and Future Order Item Summary reports.

## Future Orders and Deposits, Feature Focus Guide

NCR Voyix welcomes your feedback on this document. Your comments can be of great value in helping us improve our information products. Please contact us using the following email address:  
[Documentation.HSR@NCRVoyix.com](mailto:Documentation.HSR@NCRVoyix.com)