Aloha Takeout Report Guide

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Preface

Welcome to the Aloha® Takeout Report Guide, a comprehensive analysis of the reporting features provided by the Aloha Takeout system. You will learn the benefits of each report and see selected examples to help you further understand the vast reporting capabilities.

Reports are essential in a business. They gauge the progress of your restaurant and determine your success or failure. In a corporation, reports provide an important link from the store level to corporate. Some of the reports include comparison data. These comparisons could be between employees, against promised delivery times to customers, current or past business days.

The reports contained in Aloha Takeout can also assist you in planning for future orders so that you may plan your staffing needs, as well as ensure you have sufficient items on hand to accommodate these orders. Additionally, Aloha Takeout enables you to run reports so that you can identify your top customers and pinpoint absent customers.

Aloha Takeout contains two Front-of-House (FOH) and multiple Back-of-House (BOH) reports. In addition to viewing and printing the Aloha Takeout BOH reports, you can also export them to a .csv file. Aloha Takeout provides you with a wide variety of reports, such as the Actual vs. Estimated Delivery report, the Late Delivery report, the Future Orders report, the Catering Detail report, the Customer Detail report, and more.

Support information

If you have any questions about the material covered in this document, please contact your internal support department, or your local NCR Voyix representative. NCR Voyix provides a wide range of support programs—contact your local Account Team for more details.

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How this guide is organized

The following list provides a brief description of the contents of this document.

Chapter 1, "Analyzing your FOH reports"

This chapter discusses the FOH reports, which provide you with up to the minute reporting data from the FOH terminals. Some reports appear on screen, and some you can print.

Chapter 2, "Analyzing your BOH reports"

This chapter discusses the BOH reports, which enable you to operate a successful business. The chapter provides information about how to limit and sort the information that goes into your reports, and how to print reports before or after previewing them on the screen.

Index

The index gives a list, in alphabetical order with page references, of the topics and tasks covered in this document.

Document conventions

The following typographical conventions are used in this document:

Table Pref-1: Typographical Conventions

Style	Indicating
Bold	An option that you can select on the screen, for example, **Previous**
BoldItalic	Extra emphasis A physical key, for example, ***Enter***
`Code`	Text displayed on a screen Commands or data entered by the user Program text
Italic	The first reference to a keyword[1] The title of a publication, for example, Product Overview A file or folder name, for example, C:\Program Files\NCR

1. Table Footnote First

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About Aloha Takeout FOH reports

Aloha Takeout provides two Front-of-House reports, the driver Pre-Checkout and Employee Checkout reports. The information in these reports reflects totals for the current day, up to the hour at which you generate the report. Use these reports to review runs made by a driver, the payments tendered, non-cash tips received, the cash transactions, the delivery fees earned, and the cash owed to the store. Unlike the Back-of-House reports discussed in the next chapter, it is not possible to change the settings for these FOH reports.

While both reports print to the local receipt printer, only the Employee Checkout report is available for viewing on-screen, and this requires configuration to occur first. Refer to "Configuring the employee checkout report to appear on FOH terminal" on page 1-2.

Adding checkout buttons to the ATO FOH screen

It is necessary to add two buttons to the ATO FOH screen, to provide a means for your drivers to access the two checkout reports. The Pre-Checkout button allows a driver to print and review their information before checking out, and the Checkout button allows a driver to view and print the Employee Checkout report, as well as complete a check out prior to clocking out.

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Panel Options** tab.
2. Select the **Driver** tab.
3. Under the 'Actions' group bar, click the **Add** drop-down arrow, select **Pre-Checkout** as the Action type, and click **OK**. Repeat this **action** to add Checkout as an Action type.
4. Use **Move up** and **Move down** to rearrange the action buttons in the selected list and customize the order in which they appear on the ATO FOH screen.
5. Click **Save**.

Configuring the employee checkout report to appear on FOH terminal

To view the Employee Checkout report on-screen, ensure PrtInter.dll resides in the Bin directory and that it is registered. You then need to add the appropriate command line to PrtIncptr.ini and enable the COM interface.

To configure the PrtIcptr.ini file:

1. Locate **PrtIncptr.ini** in the Newdata directory and press **Enter**. The file opens in Microsoft® Notepad®.
2. Type **FOHDOC_CHECKOUT=1**, which is the command line specific to the Employee Checkout report.
3. Select **File > Save**.
4. Exit **Notepad**.
5. In new Aloha Manager or Aloha CFC, select **Utilities > POS > Refresh POS Data** or manually copy **PrtIncptr.ini** into the Data directory.

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To enable FOH COM interface:

1. Select **Maintenance > Business > Store > Store Settings** tab **> System** tab**.**
2. Under the 'Interfaces' group bar, select **Enable FOH COM Interface.**
3. Click **Save** and exit the **Store** function.

Caution: When these reports print, the FOH stalls momentarily as all resources are used to print or view. Do not continue to touch the Print button, or the FOH will not respond.

To run a checkout report on the ATO FOH:

1. Touch **Drivers** on the navigation bar to access the Drivers screen.
2. Select a **driver**.
3. Touch **Pre Checkout** to run a Pre-Checkout report or touch **Checkout** to run an Employee Checkout report and check out the driver. The system prints the report to the local receipt printer.

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Analyzing the driver Pre-Checkout report

The Driver Pre-Checkout report enables you to review the delivery activity of a driver, to review the financial transactions, and to assess the cash liability of the driver, if any. The Pre-Checkout report does not include or account for driver fees. Driver fees appear on the Employee Checkout report and can also be seen on the BOH Driver Details report. The Pre-Checkout report contains the following sections:

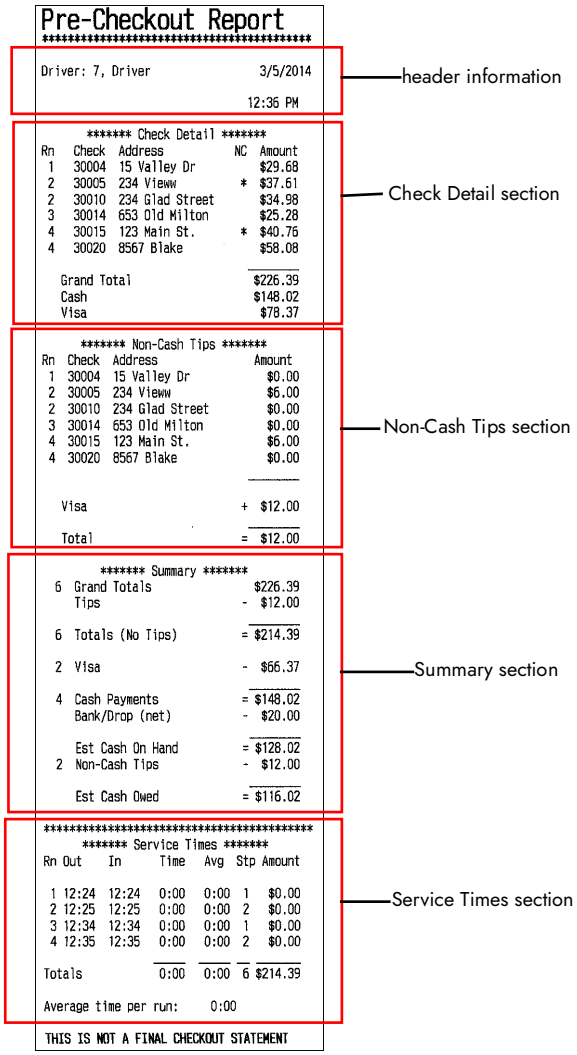

Figure 1 - 1 Pre-Checkout Report

Report Section	Description
Header	Header includes: • The name of the delivery driver. • The date and time of the printing of the report.

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Report Section	Description
Check Detail	Check Detail includes a breakdown of each delivery order: ● The delivery run for the order. ● The Aloha POS check number. ● The delivery address. ● The payment mode, either cash or non-Cash. An asterisk (*) in the NC column indicates the customer paid with a non-cash payment. ● The total amount received, including non-cash tips. The Check Detail section also includes a summary of the checks. The summary includes: ● The grand total amount received by the delivery driver, including non-cash tips. ● The grand total amount received by tender type.
Non-Cash Tips	Non-Cash Tips includes a breakdown of each delivery order: ● The delivery run for the order. ● The Aloha POS check number. ● The delivery address. ● The non-cash tip for the order. The Non-Cash Tips section also includes a summary of the non-cash tips received. The summary includes: ● The total amount of non-cash tips received by tender type. ● The total amount of non-cash tips received.
Summary	Summary calculates the 'Est Cash Owed' of the driver. The calculation is as follows: Est Cash Owed = Grand Totals - Tips - Non-Cash Payments +/- Cash Transactions - Tips. Tips are subtracted twice. Once from the Grand Total and again from the Est Cash on Hand.

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Report Section	Description
Service Times	Service Times includes a breakdown of each delivery run of the driver: ● The delivery run. ● The departed time. ● The return time. ● The time gone. ● The average time. ● The number of stops for the delivery run. ● The amount received for each run, not including non-cash tips. Service Times also includes a summary of the delivery runs of the driver: ● The total time out. ● The total average time. ● The total number of stops. ● The total amount received, not including non-cash tips.

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Analyzing the Employee Checkout report

The Employee Checkout report provides a breakdown of the transactions of the driver during a shift.

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Prior to clocking out, a driver must check out.

```
Employee Checkout
Unit #1212                          03/05/2014

Driver 7 (Driver)                   12:36 PM
SHIFT: 1
Rev: MAIN

              *** SALES ***
SOUP/SALAD:                          26.84(+)
POTATOES:                            57.90(+)
DESSERT:                              8.84(+)
NON ALC:                             46.54(+)
SIDES:                                3.98(+)
MODIFIER:                             0.00(+)

SALES:                              144.10

NO CATEGORY:                         53.94(+)

TOTAL:                              198.04

              *** TAXES ***
EXCLUSIVE:

8.25 Food:                           16.35(+)


Total:                               16.35

GROSS SALES:                        214.39

Terminal: 13
*** PAYMENTS ***
04 Cash:                            148.02
02 VISA:                             78.37(-)
 TOTAL PAYMENTS:                    226.39
   -- ----
           *** CASH TXNS ***
Kiosk Manager
12:19 PM            Driver Bank   20.00
Kiosk Manager
12:24 PM            Driver Drop  -25.00
Kiosk Manager
12:34 PM            Driver Drop  -15.00
Kiosk Manager
12:36 PM            Driver Drop -116.02
     TOTAL TXNS:                -136.02(+)

  NET CASH OWED:                      0.00


Employee X_____________________


Cash Rcvd By X_________________

              *** CASH ***
CASH PAYMENTS:                      148.02(+)
LESS CHARGE TIPS:                    12.00(-)
DELIVERY COMMISSION:                 12.00(-)
CASH TXNS:                         -136.02(-)
TOTAL CASH OWED:                    -12.00(=)

              *** VISA ***
 30005 XXXXXXXXXXXX1111   31.61    6.00
 30015 XXXXXXXXXXXX1111   34.76    6.00
 ---------------------------------------------
                          66.37   12.00

Number Of Deliveries:                   6
Delivery Commission:                12.00

        *** Delivery Details ***
 30004      Melissa Marko   29.68
 30005          Jeorge Goo  31.61
 30010       Todd Reynolds  34.98
 30014     Shannon Morgan   25.28
 30015          Bill Smith  34.76
 30020        Gregg Polhkj  58.08

              *** AUDIT ***
65 GUESTS    06 CHECKS
ROUNDING BENEFIT:                    0.00

*****************************************
           *** SALES DETAIL ***
GROSS SALES                         *214.39
NET SALES                           *198.04
FOOD                          65    *144.10
PPA                                   *2.22
```

header information

Sales section

Payments section

Cash Txns section

Cash section

non-cash section

Delivery Details

Audit section

Sales Detail section

Figure 1 - 2 Employee Checkout Report

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Report Section	Description
Header	Header includes: ● The store number. ● The name of the delivery driver. ● The shift for which the driver worked. ● The revenue center for the delivery orders. ● The date and time of the printing of the report.
Sales	Sales includes an itemized breakdown and calculation for Gross Sales. The Gross Sales is calculated as: Revenue items + Taxes + Sold Gift Certificates + Cash automatic gratuities + Deferred tips + Delivery fees + Surcharges + Not-redeemed tenders + Additional service charges.
Payments	Payments identifies the terminal for which the driver tendered payments and includes: ● The total amount received for each tender type for which the driver received payment. Non-cash tender summaries include tips. ● The total amount received for all tender types, including non-cash tips received.
Cash TXNS	Cash Transactions details the driver banks and drops between the driver and the cashier. If you enabled 'Cash to store at checkout,' the system calculates and executes the final transaction necessary so that the 'NET CASH OWED' amount is '0.00.'
Cash	Cash calculates the TOTAL CASH OWED by or to the driver. TOTAL CASH OWED is calculated as: Cash Payments - Non-Cash Tips - Delivery Commissions - Cash Transactions. (The Cash Transactions amount is the TOTAL TXNS amount from the CASH TXNS section.) If the driver is configured to receive delivery fees, the TOTAL CASH OWED may be a negative amount, which is a commission owed to the driver.
Non-Cash tenders	Non-cash tenders provides, by non-cash tender, the following: ● The Aloha POS check number. ● The last four digits of the non-cash tender. ● The total amount of the check. ● The non-cash tip received. The non-cash section also includes: ● The total amount received for a non-cash tender. ● The total amount of non-cash tips received for a tender type.

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Report Section	Description
Delivery Details	Delivery Details includes: ● The total number of deliveries by the driver. ● The total amount of delivery commissions earned by the driver. ● The Aloha POS check number for each delivery. ● The customer name. ● The total of the check, excluding any non-cash tips.
Audit	Audit includes the number of guests, the number of checks, and any rounding benefit.
Sales Detail	Sales provides a summary of Gross Sales, Net Sales, and sales by revenue center.

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About Aloha Takeout BOH reports

The Aloha Takeout Back-of-House (BOH) reports provide vital information to aid you in operating, tracking, and monitoring your takeout and delivery business. The reports menu contains selections that enable you to run reports on driver and delivery activity, open orders, future orders, catering orders, deposits, credits, and your customers.

The report formats are configured by the user and no longer require font selection. Fonts are built in to the system using the True Type capabilities of the Microsoft® Windows® operating systems.

Some reports are a collection of separate sections that display selected information defined by you using the report settings dialog box. The examples given in this book do not display actual data and are intended to be used as a guide.

In this guide you learn how to:

- Define and prioritize report fields for specific reports.
- Navigate through the Preview Report screen.
- Export a report to a .csv file.

Key benefits of the Aloha Takeout BOH reports

The following is a list, in menu order, of the Aloha Takeout reports available to you and their key benefits:

Report	Description
Actual Vs. Estimated Delivery Report	Details the departure and return time of the driver compared to the estimated trip time.
Speed of Service Delivery Report	Displays thresholds in the ordering process that may identify service issues.
Driver Details Report	Enables you to focus on driver accountability with payment types, tips, and driver fees for each delivery.
Late Order Report	This report is targeted for a future release.
Open Orders Report	Displays any open ATO orders, allowing you to check for open orders prior to running End-of-Day.
Future Order Report	Displays the details of future orders for any future date selected.
Future Order Item Summary Report	Displays the items ordered for a future date selected. Enables you to view the items needed and ensure you have enough product to produce the scheduled orders.
Pending Deposits Report	Displays the current deposit liability for the store.
New Deposits Report	Displays the deposits collected within the selected date range.
Withdrawn Deposits Report	Displays the deposits withdrawn within the selected date range. Deposits may be applied, refunded, or surrendered to be considered withdrawn.

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Report	Description
Unclaimed Deposits Report	Displays the deposits that were not applied to the future order when the order was released or when an order was closed by the EOD without applying the deposit. This report accounts for discrepancies.
Mailing List Report	Enables you to display, print, or export a customer mailing list for all the customers in your database
Absent Customer List Report	Enables you to identify customers who have not ordered from you recently.
Top Customer Report	Enables you to identify those customers with the most visits.
Customer Detail Report	Enables you to track down specific orders for customers.
Call Back List Report	Outputs a list for a selected date or range of dates for you to call customers who have placed call in, delivery, or catering orders.
Customer Credit Report	Displays a list of clients who have a credit account balance.
Catering Summary Report	Displays the details of future catering orders for any future date selected.
Catering Detail Report	Displays the items ordered for a future catering event. Enables you to view the items needed and ensure you have enough product to produce the scheduled catering orders.

Navigating the Reports Preview screen

The navigation buttons located across the top of the Report Preview screen provide common options for many, but not all of the reports. Click the desired button, if it is available for the particular report:

Runs the report. Select this button when you are ready to run a particular report.

Toggles the display to a page thumbnail view on an extra sidebar. Select this button again to collapse the sidebar.

Prints the report.

Copies the selected text to the clipboard.

Searches the report for specified text and opens the Find dialog box.

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Zooms out on the report.

Zooms in on the report.

Displays the current zoom percentage of the report. You can enter a percentage to change the display size of the report.

Sizes the report to maximum width of the page.

Sizes the report to fit the full page of the screen.

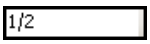
Changes the view of the report to a single page.

Changes the view of the report to a continuous scrolling page.

Allows you to specify the number of pages to display in a single view.

Goes to the first page of the report.

Goes to the previous page of the report.



Identifies the current page and the total number of pages in the report.

Goes to the next page of the report.

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Goes to the last page of the report.

Goes backward a page.

Goes forward a page.

Shows the command line for the report.

Choosing a report date range

Most Aloha Takeout reports allow you to select a specific date or date range to run the report. The reports function contains pre-configured dates and date ranges for you to use, or you can select your own date or date range.

To use a pre-configured date range:

1. On the Reports menu, select a **report** to run. The Report Preview screen appears. When the option to choose a date or date range is available, the system displays a 'Report Date Range' filter on the left side of the Report Preview screen.

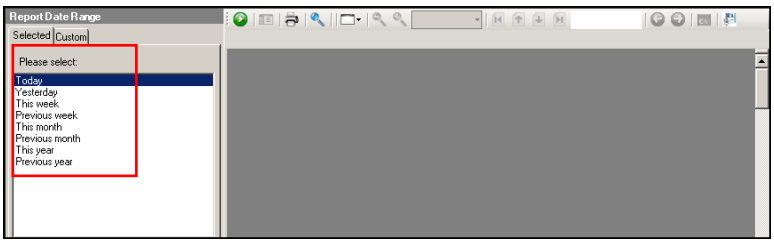

Figure 2 - 1 Report Preview Screen

2. Select one of the pre-configured date ranges.
3. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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To use a custom date range:

1. On the Reports menu, select a **report** to run. The Report Preview screen appears. When you have the option to choose a date for your report, Report Date Range appears on the left side of the Report Preview screen.

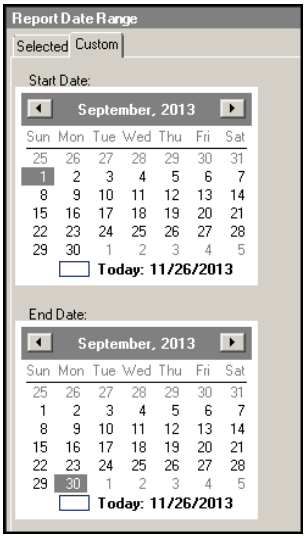

Figure 2 - 2 Report Date Range, Custom

2. Select the **Custom** tab.
3. Under 'Start Date,' use the **right** and **left arrows** to select a **start** and **end date**.
4. Under 'End Date, use the **right** and **left arrows** to select a **start** and **end date**.
5. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

Exporting report data

Most Aloha Takeout reports allow you to export the report information to a .csv file. For example, you may want to export your mailing list to a file to create a 'Mail Merge' with Microsoft® Word® or you may want to export an email list to email your customers.

1. On the Reports menu, select a **report**.
2. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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3. In the Report Preview toolbar, click located to the right of the command line button. Most reports contain only one export option. However, some reports, such as the Customer Mailing List, contain multiple export options. The 'Save Export Output As' dialog box appears.

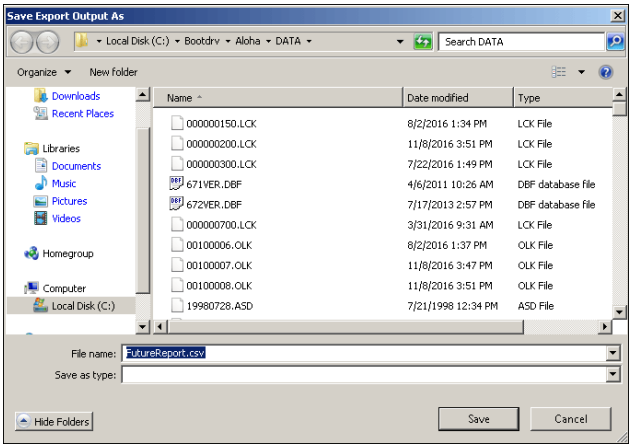

Figure 2 - 3 Save Export Output As Dialog Box

4. Navigate to **a folder** on your system to save the file.
5. Use the **default file name** or type **a file name** that best meets your operational needs.
6. Click **Save.**

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Actual vs. Estimated Delivery report

The Actual vs. Estimated Delivery report provides information about the performance of a driver. The report details the departure and return time of the driver compared to the estimated trip time. This report can help determine if a driver is speeding, requires a better knowledge of the driving area, or may be making unscheduled stops.

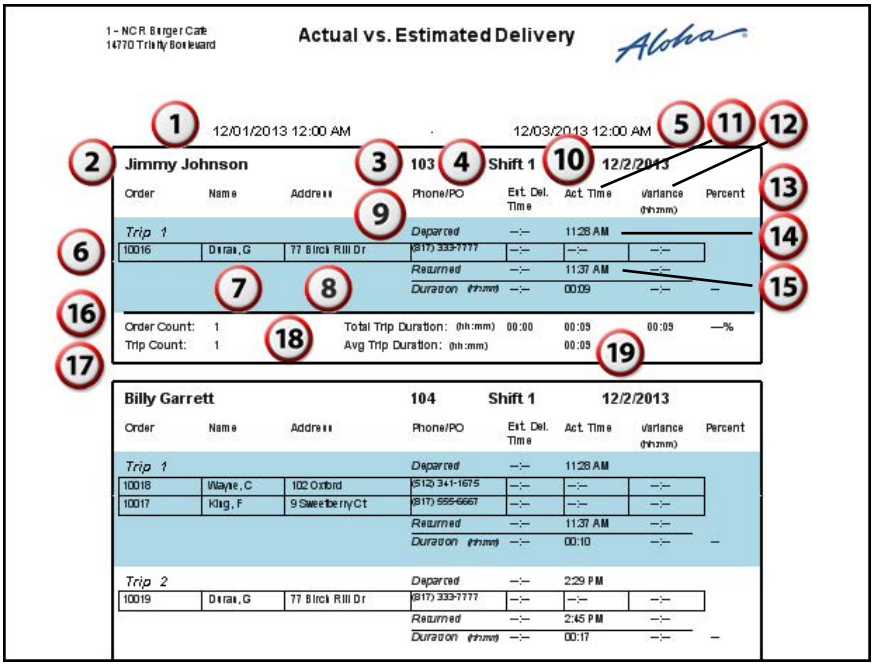

Figure 2 - 4 Actual vs. Estimated Report

#	Column	Description
1.	**Selected Date Range**	The date range for the report.
2.	**Name**	The name of the driver.
3.	**Employee Number**	The Aloha POS assigned employee number.
4.	**Shift**	The shift(s) the driver worked for the selected date range.
5.	**Date**	The date for the report information.
6.	**Order**	The Aloha check number.
7.	**Name**	The customer name.
8.	**Address & Phone Number**	The selected delivery address and phone number for the customer.
9.	**Phone**	The selected phone number for the customer.
10.	**Est. Del. Time**	The estimated delivery time for the run. This requires installing and enabling Aloha Takeout Mapping.

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#	Column	Description
11.	**Act. Time**	The time difference between the dispatch and return of the driver.
12.	**Variance**	The variance in minutes between the actual time and the estimated delivery time. Calculation: Act. Time - Est. Time = Variance.
13.	**Percent**	The percentage difference between the actual and estimated delivery times.
14.	**Departed**	The time the driver was dispatched in ATO.
15.	**Returned**	The time the driver returned in ATO.
16.	**Order Count**	The total number of orders the driver delivered during his shift.
17.	**Trip Count**	The total number of runs the driver made during his shift.
18.	**Total Trip Duration**	The total amount of time the driver was dispatched.
19.	**Avg. Trip Duration**	The average time of each trip.

There are no report settings available to control the Actual vs. Estimated Delivery report.

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Speed of Service report

The Speed of Service report displays thresholds in the ordering process that may identify service issues. You can evaluate order time, in-store time, departure time, and return time, to determine if they are outside of service standards.

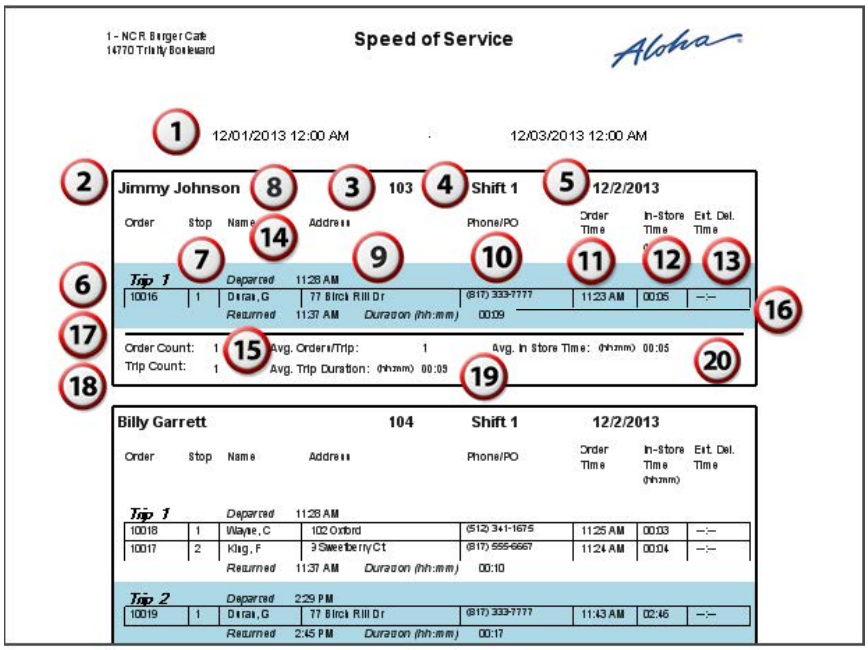

Figure 2 - 5 Speed of Service Report

#	Column	Description
1.	**Selected Date Range**	The date range of the report.
2.	**Driver Name**	The name of the driver.
3.	**Employee Number**	The Aloha POS assigned employee number.
4.	**Shift**	The shift(s) the driver worked for the selected date range.
5.	**Date**	The date for the report information.
6.	**Order**	The Aloha POS check number.
7.	**Stop**	The order of the stop within the trip.
8.	**Name**	The customer name.
9.	**Address**	The selected delivery address for the customer.
10.	**Phone**	The selected phone number for the customer.
11.	**Order Time**	The time the order was sent to the kitchen.
12.	**In-Store Time**	The amount of time between order receipt to driver dispatch.

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#	Column	Description
13.	**Est. Del. Time**	The estimated delivery time to each stop. This feature is not currently supported.
14.	**Departed**	The time the driver was dispatched in ATO.
15.	**Returned**	The time the driver returned in ATO.
16.	**Duration**	The difference in time between the departed time and returned time.
17.	**Order Count**	The total number of orders the driver delivered during his shift.
18.	**Trip Count**	The total number of runs the driver made during his shift.
19.	**Avg. Order/Trip & Avg. Trip Duration**	The average number of orders and average duration of each trip.
20.	**Avg. In Store Time**	The average time each order was in the store.

There are no report settings available to control the Speed of Service Delivery report.

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Driver Details report

The Driver Details report enables you to focus on driver accountability with payment types, tips, and driver fees for each delivery.

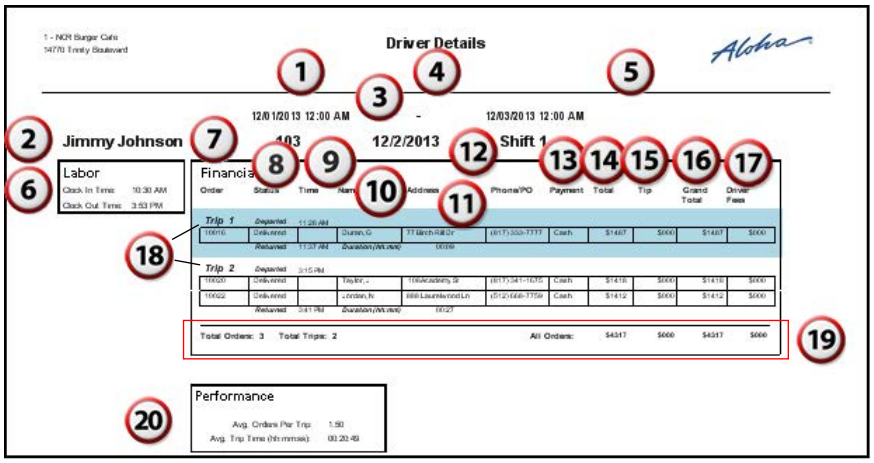

Figure 2 - 6 Driver Details Report

#	Column	Description
1.	**Selected Date Range**	The date range of the report.
2.	**Driver Name**	The name of the driver.
3.	**Employee Number**	The Aloha POS assigned employee number.
4.	**Date**	The date for the report information.
5.	**Shift**	The shift(s) the driver worked for the selected date range.
6.	**Labor**	The clock-in and clock-out times for the driver.
7.	**Order**	The Aloha check number.
8.	**Status**	The order status. This could be Pending, In Transit, Recalled, or Delivered, depending on when you run the report.
9.	**Time**	The departure and arrival time for each trip.
10.	**Name**	The customer name.
11.	**Address**	The selected delivery address for the customer.
12.	**Phone**	The selected phone number for the customer.
13.	**Payment**	The form of payment used on the check.
14.	**Total**	The total amount due on the check.
15.	**Tip**	The tips entered for the check.
16.	**Grand Total**	The grand total of the check.

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#	Column	Description
17.	**Driver Fees**	The order mode charges applied to the check.
18.	**Trip X**	A group of deliveries dispatched as a run.
19.	**Summary**	The summary statistics for all of the delivery runs of a driver.
20.	**Performance**	The average number of orders per trip, as well as the average trip time.

There are no report settings available to control the Driver Detail report.

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Late Orders report

The Late Orders report enables you to target the orders that were not dispatched to the driver on time.

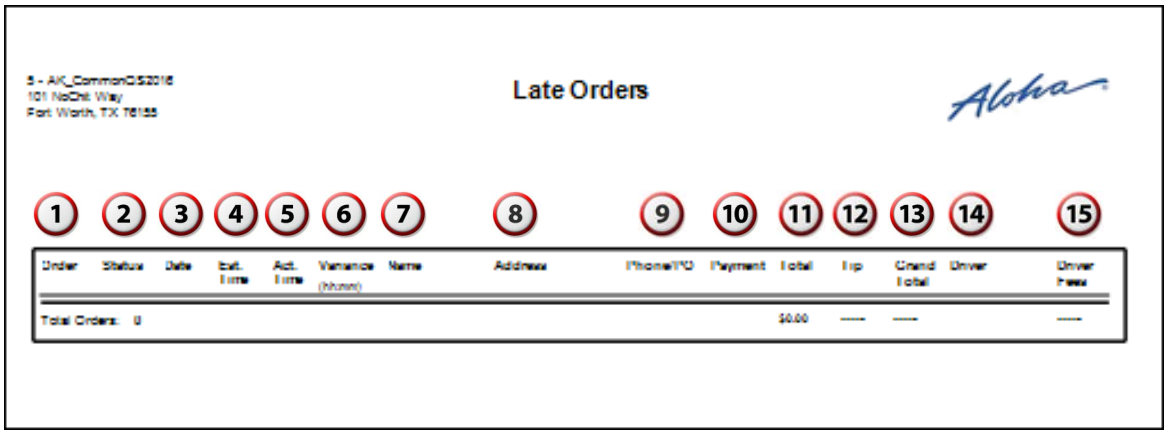

Figure 2 - 7 Late Orders Report

#	Column	Description
1.	**Order**	The order number.
2.	**Status**	The status of the order.
3.	**Date**	The date the order was submitted.
4.	**Est. Time**	The promise time of the order.
5.	**Act. Time**	The time the order was delivered.
6.	**Variance**	The difference between the estimated time and the actual time of the order.
7.	**Name**	The name associated with the order.
8.	**Address**	The address associated with the guest.
9.	**Phone/PO**	The phone number of the guest.
10.	**Payment**	The tender used to pay for the order.
11.	**Total**	The total amount of the order, excluding tip.
12.	**Tip**	The tip amount added to the order.
13.	**Grand Total**	The total amount of the order, including tip.
14.	**Driver**	The name of the driver dispatched for the report.
15.	**Driver Fees**	The driver fee associated with the order.
16.	**Total Order**	The total for all orders on the report.

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There are no report settings available to control the Late Orders report.

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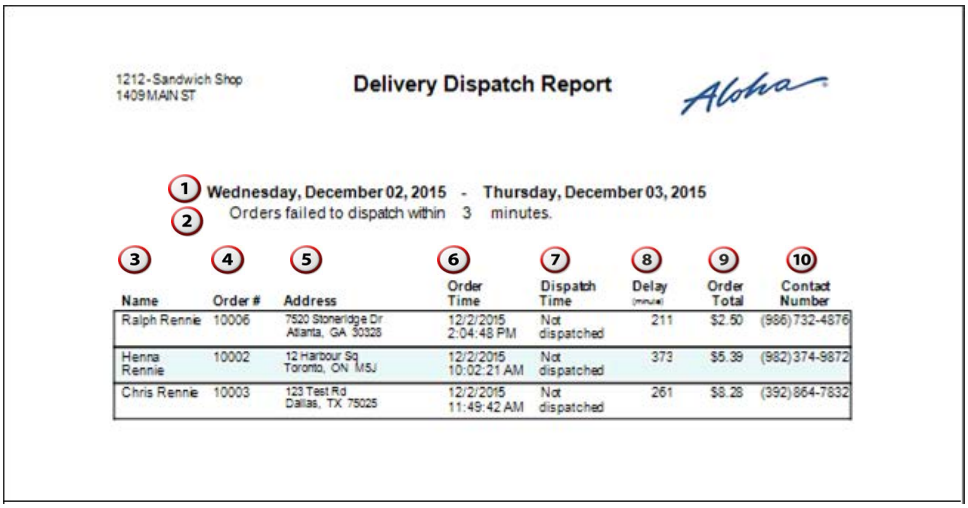
Delivery Dispatch report

The Delivery Dispatch report tracks the time between the creation of an order and the time you dispatched the order. This allows you to evaluate the efficiency of your staff when dispatching orders for delivery; in particular, if the staff dispatched the order within a specified amount of time.



1212-Sandwich Shop
1409 MAIN ST

Delivery Dispatch Report

Aloha

1 **Wednesday, December 02, 2015 - Thursday, December 03, 2015**
2 Orders failed to dispatch within 3 minutes.

3 Name	4 Order #	5 Address	6 Order Time	7 Dispatch Time	8 Delay (minute)	9 Order Total	10 Contact Number
Ralph Rennie	10006	7520 Stoneridge Dr Atlanta, GA 30328	12/2/2015 2:04:48 PM	Not dispatched	211	$2.50	(986) 732-4876
Henna Rennie	10002	12 Harbour Sq Toronto, ON M5J	12/2/2015 10:02:21 AM	Not dispatched	373	$5.39	(982) 374-9872
Chris Rennie	10003	123 Test Rd Dallas, TX 75025	12/2/2015 11:49:42 AM	Not dispatched	261	$8.28	(392) 864-7832

Figure 3 Delivery Dispatch Report Example

#	Column	Description
1.	**<date range>**	The selected date range for the report.
2.	**<threshold>**	The selected number of minutes for which the staff failed to dispatch the order.
3.	**Name**	The name of the guest.
4.	**Order #**	The order number of the check.
5.	**Address**	The address associated with the order.
6.	**Order Time**	The time at which the guest placed the order.
7.	**Dispatch Time**	The time at which the staff dispatched the order. If the order was never dispatched, 'Not dispatched' appears.
8.	**Delay (minute)**	The variance between the order time and the dispatch time.
9.	**Order Total**	The total amount of the order.
10.	**Contact Number**	The telephone number associated with the guest.

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1. On the Reports menu, select the **Delivery Dispatch** report. The Dispatch Report Control dialog box appears.

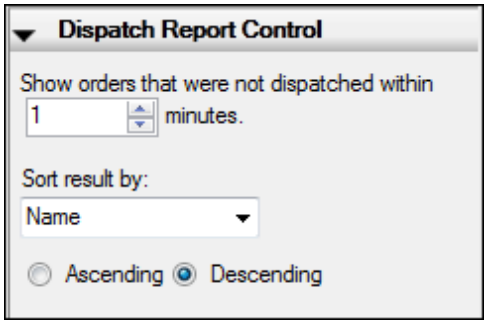

Figure 2 - 1 Report Data Selection

2. Select the **number of minutes** for which the staff failed to dispatch the order.
3. Select the **sort method** for the report.
4. Select **Ascending** or **Descending** to sort the report A-Z or Z-A.
5. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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Open Order report

The Open Order report enables you to check for any open orders with ATO before running End of Day. You define the information to include on the report. You have the option to include or exclude

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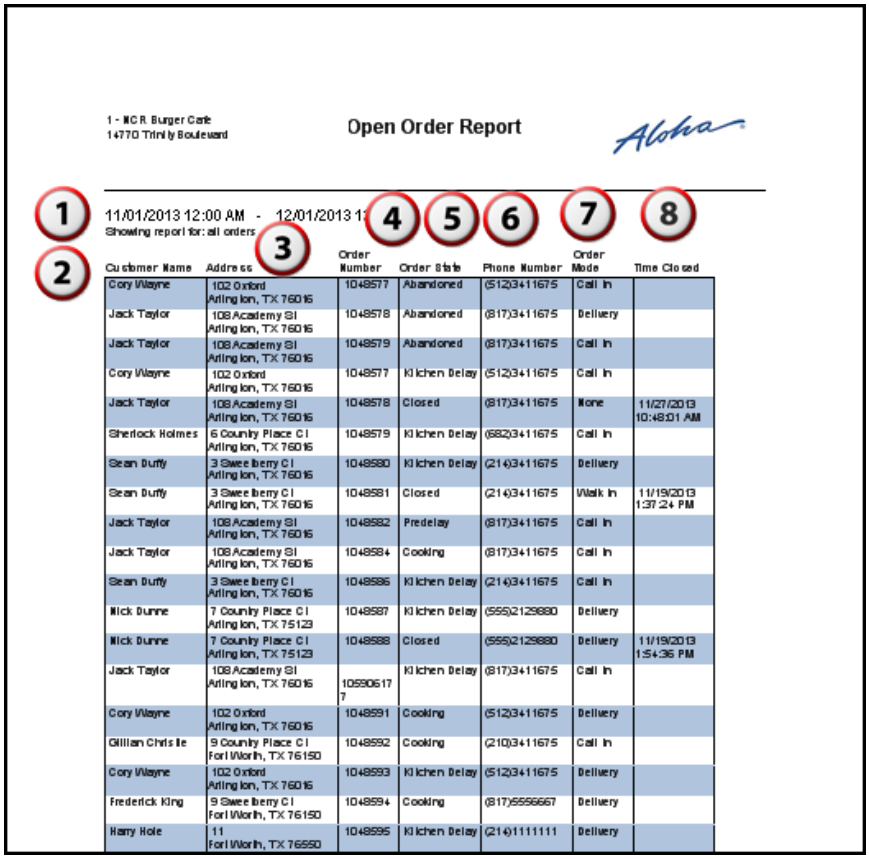
orders in a variety of states; however, a maximum of seven columns can appear in the Open Order report.



1 - NCR Burger Cafe
14770 Trinity Boulevard

Open Order Report

11/01/2013 12:00 AM - 12/01/2013 1
Showing report for: all orders

Customer Name	Address	Order Number	Order State	Phone Number	Order Mode	Time Closed
Cory Wayne	102 Oxford Arlington, TX 76016	1048577	Abandoned	(512)3411675	Call In	
Jack Taylor	108 Academy St Arlington, TX 76016	1048578	Abandoned	(817)3411675	Delivery	
Jack Taylor	108 Academy St Arlington, TX 76016	1048579	Abandoned	(817)3411675	Call In	
Cory Wayne	102 Oxford Arlington, TX 76016	1048577	Kitchen Delay	(512)3411675	Call In	
Jack Taylor	108 Academy St Arlington, TX 76016	1048578	Closed	(817)3411675	None	11/27/2013 10:48:01 AM
Sherlock Holmes	6 County Place Ct Arlington, TX 76016	1048579	Kitchen Delay	(682)3411675	Call In	
Sean Duffy	3 Sweetberry Ct Arlington, TX 76016	1048580	Kitchen Delay	(214)3411675	Delivery	
Sean Duffy	3 Sweetberry Ct Arlington, TX 76016	1048581	Closed	(214)3411675	Walk In	11/19/2013 1:37:24 PM
Jack Taylor	108 Academy St Arlington, TX 76016	1048582	Predelay	(817)3411675	Call In	
Jack Taylor	108 Academy St Arlington, TX 76016	1048584	Cooking	(817)3411675	Call In	
Sean Duffy	3 Sweetberry Ct Arlington, TX 76016	1048586	Kitchen Delay	(214)3411675	Call In	
Nick Dunne	7 County Place Ct Arlington, TX 75123	1048587	Kitchen Delay	(555)2129880	Delivery	
Nick Dunne	7 County Place Ct Arlington, TX 75123	1048588	Closed	(555)2129880	Delivery	11/19/2013 1:54:36 PM
Jack Taylor	108 Academy St Arlington, TX 76016	10590617 7	Kitchen Delay	(817)3411675	Call In	
Cory Wayne	102 Oxford Arlington, TX 76016	1048591	Cooking	(512)3411675	Delivery	
Gillian Christie	9 County Place Ct Fort Worth, TX 76150	1048592	Cooking	(210)3411675	Call In	
Cory Wayne	102 Oxford Arlington, TX 76016	1048593	Kitchen Delay	(512)3411675	Delivery	
Frederick King	9 Sweetberry Ct Fort Worth, TX 76150	1048594	Cooking	(817)6556667	Delivery	
Harry Hole	11 Fort Worth, TX 76550	1048595	Kitchen Delay	(214)1111111	Delivery	

Figure 2 - 2 Open Order Report

#	Column	Description
1.	**Selected Date Range**	The date range of the report.
2.	**Name**	The customer name.
3.	**Address**	The selected delivery address for the customer.
4.	**Order**	The Aloha POS check number.
5.	**Status**	The order status. This could be Abandoned, Cooking, Kitchen Delay, Closed, or Pre-delay, depending on when you run the report.
6.	**Phone**	The selected phone number for the customer.
7.	**Order Mode**	The order mode applied to the order.
8.	**Time Closed**	The time the order was closed in the system.

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1. On the Reports menu, select the **Open Order** report. Two report filters appear.

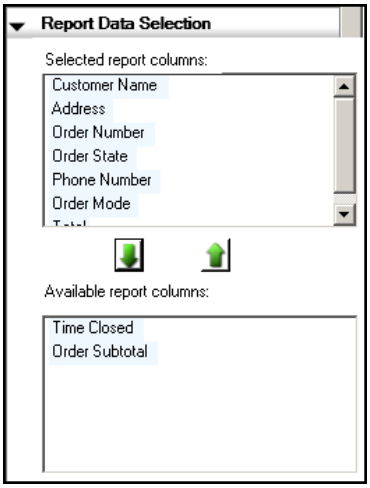

Figure 2 - 3 Report Data Selection

2. Under the 'Report Data Selection' group bar, identify **each column** to include on the report. Use the up arrow to move a filter from the 'Available' column to the 'Selected' column and use the down arrow to move a filter from the 'Selected' column to the 'Available' column.
3. Under the 'Report Filters' group bar, identify which **order states** to include in the report.

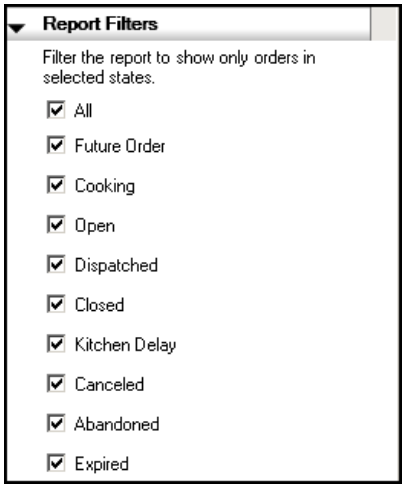

Figure 2 - 4 Report Filter Selection

4. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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Future Orders report

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.

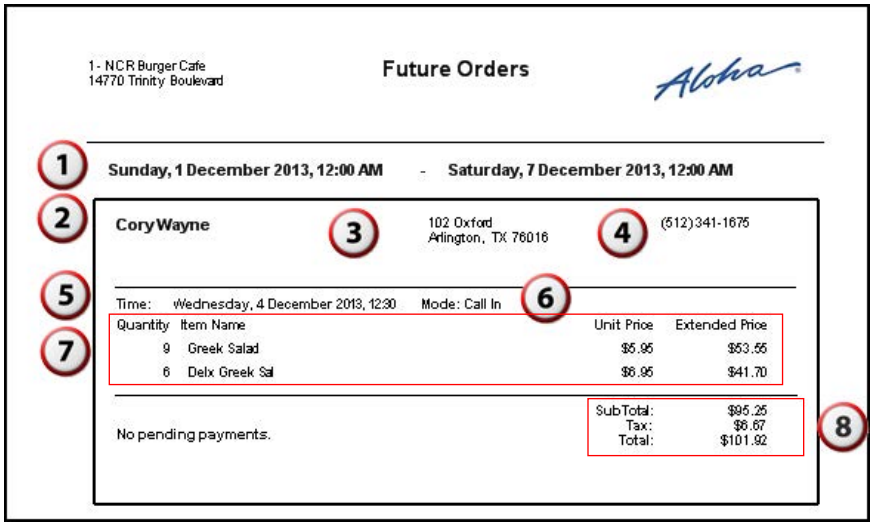

Figure 2 - 5 Future Orders Report

#	Column	Description
1.	**Selected Date Range**	The date range of the report.
2.	**Name**	The customer name.
3.	**Address**	The selected delivery address for the customer.
4.	**Phone Number**	The selected phone number for the client.
5.	**Time**	The promised date and time for the order
6.	**Mode**	The particular order mode applied to the order.
7.	**Order Details**	The item, quantity of items ordered, unit price, and extended price.
8.	**Total**	The subtotal, tax, and total of the order as well as whether or not there are any pending payments for the order.

1. On the Reports menu, select the **Future Orders** report. Two group bars appear, Layout and

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Display Controls.

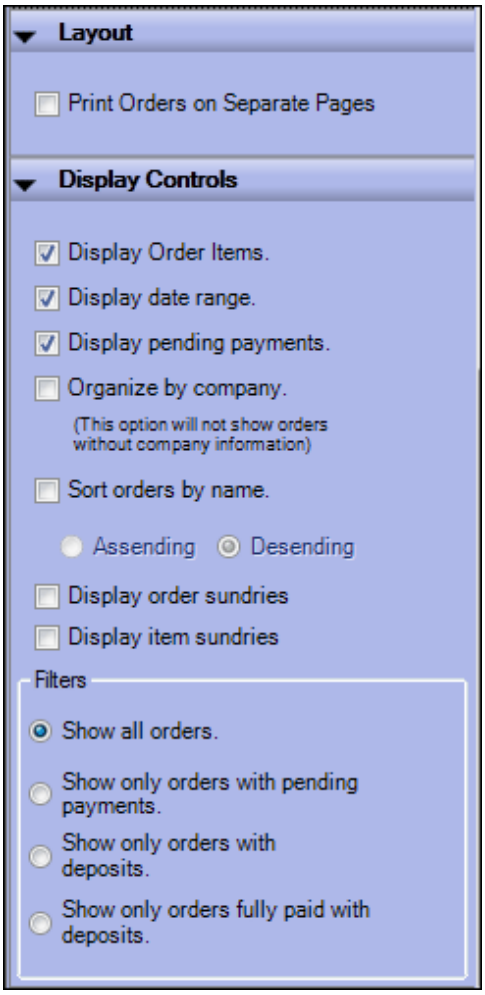

Figure 2 - 6 Future Orders Display Controls

2. Under the 'Layout' group bar, select **Print Orders on Separate Pages** to have your future orders print on individual pages.
3. Select **Display Order Items** to display the items each customer ordered.
4. Select **Display date range** to include the range in which the report is generated.
5. Select **Display pending payments** to include any orders that have a deposit or pending payment.
6. Select **Organize by company** to sort the orders by company name for which the customer works. You must have a company defined for the guest.
7. Select **Sort orders by name** to sort orders by the name of the guest. You can sort orders ascending or descending.

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8. Select **Display order sundries** to include a separate subsection with order sundries from bag and order manifest items. Use these sections as a preparation sheet of manifest items and eliminate the need to print the manifest from a local receipt printer.
9. Select **Display item sundries** to include a separate subsection with item sundries from bag and order manifest items. Use these sections as a preparation sheet of manifest items and eliminate the need to print the manifest from a local receipt printer.
10. In the 'Filters' box, select the **filters** to apply to the report.
    - Select **Show all orders** to only include all future orders for the selected date.
    - Select **Show only orders with pending payments** to only include orders with a pending payment.
    - Select **Show only orders with deposits** to only include orders with a deposit.
    - Select **Show only orders fully paid with deposits** to only include orders with a deposit which are paid in full.
11. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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Future Order Item Summary report

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

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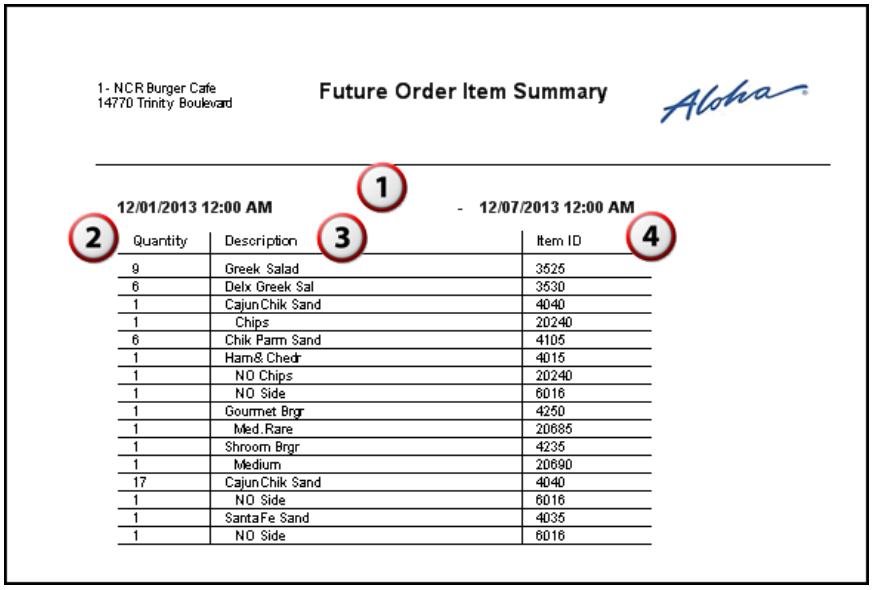
items to prepare in advance. Additionally, you can configure the report to show any item modifiers on order with the ordered items.



1- NCR Burger Cafe
14770 Trinity Boulevard

Future Order Item Summary

12/01/2013 12:00 AM - **12/07/2013 12:00 AM**

Quantity	Description	Item ID
9	Greek Salad	3525
6	Delx Greek Sal	3530
1	CajunChik Sand	4040
1	Chips	20240
6	Chik Parm Sand	4105
1	Ham& Chedr	4015
1	NO Chips	20240
1	NO Side	6016
1	Gourmet Brgr	4250
1	Med.Rare	20685
1	Shroom Brgr	4235
1	Medium	20690
17	CajunChik Sand	4040
1	NO Side	6016
1	SantaFe Sand	4035
1	NO Side	6016

Figure 2 - 7 Future Order Item Summary with Item Modifiers

#	Column	Description
1.	**Selected Date Range**	The date range of the report.
2.	**Quantity**	The consolidated quantity of each item ordered. (Note: When you select 'Display Item Modifiers,' the consolidated quantity displays by modifier.)
3.	**Description**	The short name of the item ordered.
4.	**Item ID**	The item ID in the Aloha POS system.

1. On the Reports menu, select the **Future Order Item Summary** report. The Display Item Modifiers box appears.

Figure 2 - 8 Future Order Item Summary Report Settings

2. Select **Display Item Modifiers** to include modifiers in the report.

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3. Select **Display Item Sundry Summary** to include a separate subsection with a summary of the item sundries from bag and order manifest items.
4. Select **Display Item Sundries** to include a separate subsection with item sundries from bag and order manifest items. Use these sections as a preparation sheet of manifest items and eliminate the need to print the manifest from a local receipt printer.
5. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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Pending Deposits report

The Pending Deposits report displays the current deposit liability for the store. There are no date range parameters available for this report.

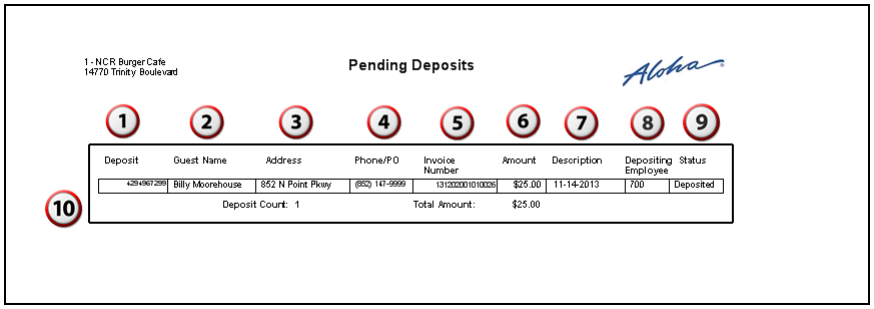

Figure 2 - 9 Pending Deposits Report

#	Column	Description
1.	**Deposit**	The internal, system-generated number to track individual deposits.
2.	**Guest Name**	The customer name.
3.	**Address**	The selected delivery address for the customer.
4.	**Phone/PO**	The selected phone number for the customer.
5.	**Invoice Number**	The unique, system generated number for the order.
6.	**Amount**	The deposit amount.
7.	**Description**	The date the deposit was applied.
8.	**Depositing Employee**	The employee who accepted the deposit. The report displays the Aloha employee ID number of the employee.
9.	**Status**	The current status of the deposit. Generally, this field displays as 'Deposited' unless another deposit is in process on a terminal at the time the report is run.
10.	**Summary**	The total number of and total amount of pending deposits.

There are no report settings available to control the Pending Deposits report.

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New Deposits report

The New Deposits report displays the deposits accepted within a specified date range. Typically, you run this report for the current day to balance against the payment report.

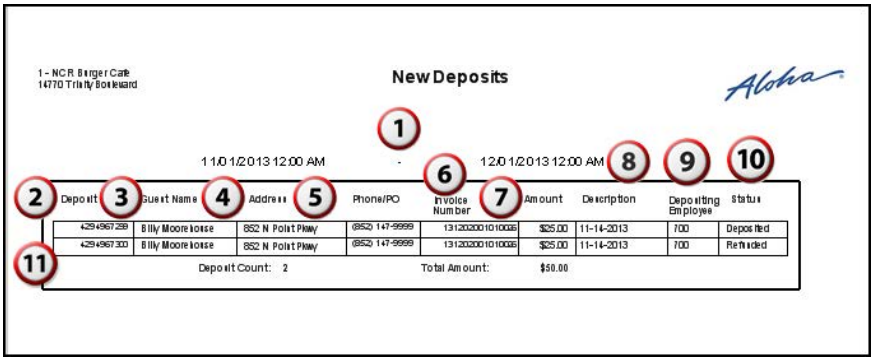

Figure 2 - 10 New Deposits

#	Column	Description
1.	**Selected Date Range**	The date range of the report.
2.	**Deposit**	The internal, system-generated number to track individual deposits.
3.	**Guest Name**	The customer name.
4.	**Address**	The selected delivery address for the customer.
5.	**Phone/PO**	The selected phone number for the customer.
6.	**Invoice Number**	The unique, system generated number for the order.
7.	**Amount**	The deposit amount.
8.	**Description**	The date the deposit was applied.
9.	**Depositing Employee**	The employee who accepted the deposit. The report displays the employees Aloha employee ID number.
10.	**Status**	The current status of the deposit. Generally, this field displays as 'Deposited' unless another deposit is in process on a terminal at the time the report is run or unless a deposit was refunded.
11.	**Summary**	The total number of and total amount of deposits received.

There are no report settings available to control the New Deposits report.

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Withdrawn Deposits report

The Withdrawn Deposits report displays deposits withdrawn during the selected date range. Deposits may be applied, refunded, or surrendered, to be considered withdrawn.

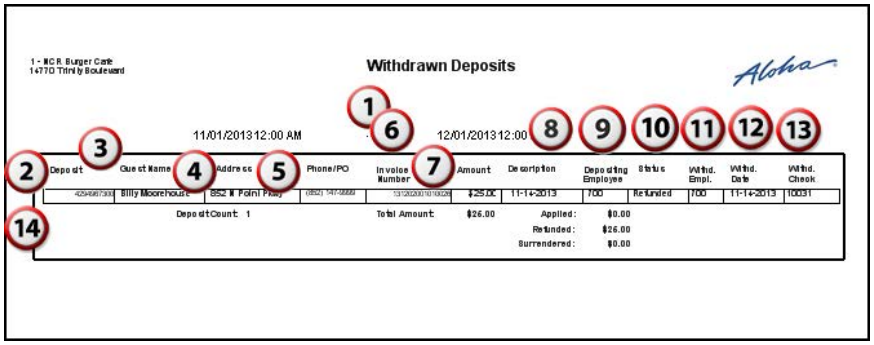

Figure 2 - 11 Withdrawn Deposits

#	Column	Description
1.	**Selected Date Range**	The date range of the report.
2.	**Deposit**	The internal, system-generated number to track individual deposits.
3.	**Guest Name**	The customer name.
4.	**Address**	The selected delivery address for the customer.
5.	**Phone/PO**	The selected phone number for the customer.
6.	**Invoice Number**	The unique, system generated number for the order.
7.	**Amount**	The deposit amount.
8.	**Description**	The date the deposit was applied.
9.	**Depositing Employee**	The employee who accepted the deposit. The report displays the employees Aloha employee ID number.
10.	**Status**	The current status of the deposit, either Applied, Refunded, or Surrendered.
11.	**Withdrawing Employee**	The employee applying, refunding, or surrendering the deposit.
12.	**Withdrawal Date**	The date the deposit was applied, refunded, or surrendered.
13.	**Withdrawal Check**	The Aloha POS check number used to apply, refund, or surrender the deposit.
14.	**Summary**	The summary statistics for the withdrawn deposits.

There are no report settings available to control the Withdrawn Deposits report.

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Unclaimed Deposits report

The Unclaimed Deposits report displays the deposits that were not applied to a future order when the order was released or when an order was closed by the End-of-Day without applying the deposit. In most cases, ATO prevents this from happening by requiring you to address deposits prior to dispatching or tendering the order. In the event you do not apply a deposit, the Unclaimed Deposits report accounts for any discrepancies.

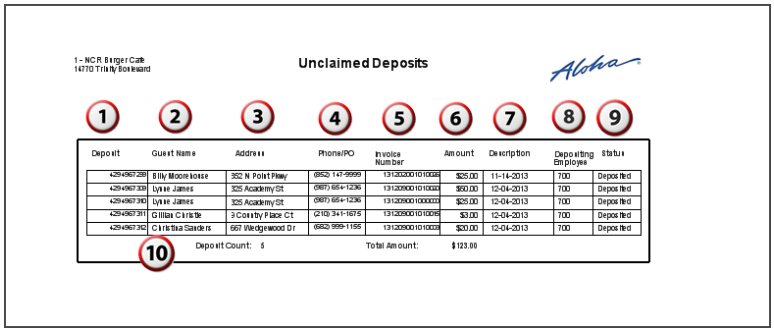

Figure 2 - 12 Unclaimed Deposits Report

#	Column	Description
1.	**Deposit**	The internal, system-generated number to track individual deposits.
2.	**Guest Name**	The customer name.
3.	**Address**	The selected delivery address for the customer.
4.	**Phone/PO**	The selected phone number for the customer.
5.	**Invoice Number**	The unique, system generated number for the order.
6.	**Amount**	The deposit amount.
7.	**Description**	The date the deposit was applied.
8.	**Depositing Employee**	The employee who accepted the deposit. The report displays the Aloha POS employee ID number.
9.	**Status**	The status displays as Deposited.
10.	**Totals**	The number of and total amount of unclaimed deposits.

There are no report settings available to control the Unclaimed Deposits report.

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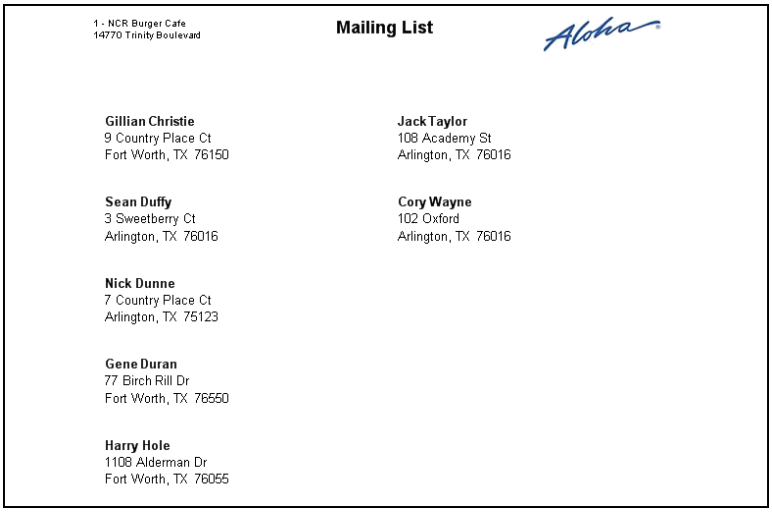
Customer Mailing List report

The Mailing List report enables you to display, print, or export the address information for the customers within your database. The Mailing List report provides you with three export report types. These export options appear on the Report Preview toolbar, see "Exporting report data" on page 2-6.

Export to a Mailing List .csv file — Creates a file with the following fields: FirstName, LastName, AddressLine1, AddressLine2, City, State, and Zip.

Export to an Email List .csv file — Creates a file with the following fields: FirstName, LastName, and Email.

Export to a Detailed Customer List .csv file — Creates a file with the following fields: FirstName, LastName, AreaCode, PhoneNumber, Extension, AddressLine1, AddressLine2, City, State, Zip, Email, LastVisit, and NumberOfVisits.


1 - NCR Burger Cafe
14770 Trinity Boulevard

Mailing List

Gillian Christie
9 Country Place Ct
Fort Worth, TX 76150

Jack Taylor
108 Academy St
Arlington, TX 76016

Sean Duffy
3 Sweetberry Ct
Arlington, TX 76016

Cory Wayne
102 Oxford
Arlington, TX 76016

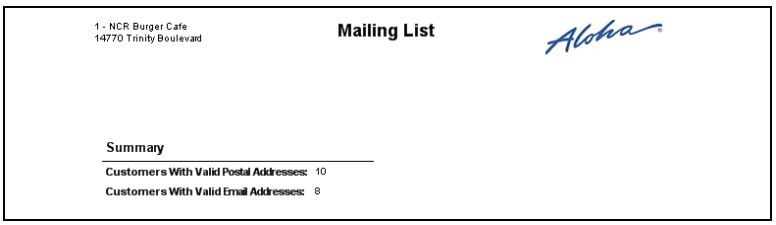
Nick Dunne
7 Country Place Ct
Arlington, TX 75123

Gene Duran
77 Birch Rill Dr
Fort Worth, TX 76550

Harry Hole
1108 Alderman Dr
Fort Worth, TX 76055

Figure 2 - 13 Mailing List Report

A summary section appears at the bottom of the report, which provides you with the number of customers who have valid postal addresses, as well as the number of customers for which you have email addresses.


1 - NCR Burger Cafe
14770 Trinity Boulevard

Mailing List

Summary

Customers With Valid Postal Addresses:	10
Customers With Valid Email Addresses:	8

Figure 2 - 14 Summary Section of Mailing List Report

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There are no report settings available to control the Mailing List report.

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Absent Customer report

The Absent Customer report enables you to identify customers who have not ordered from you within a specified time frame. You can filter the report for the number of days since a customer ordered from you and whether or not to include customers who never ordered from you.

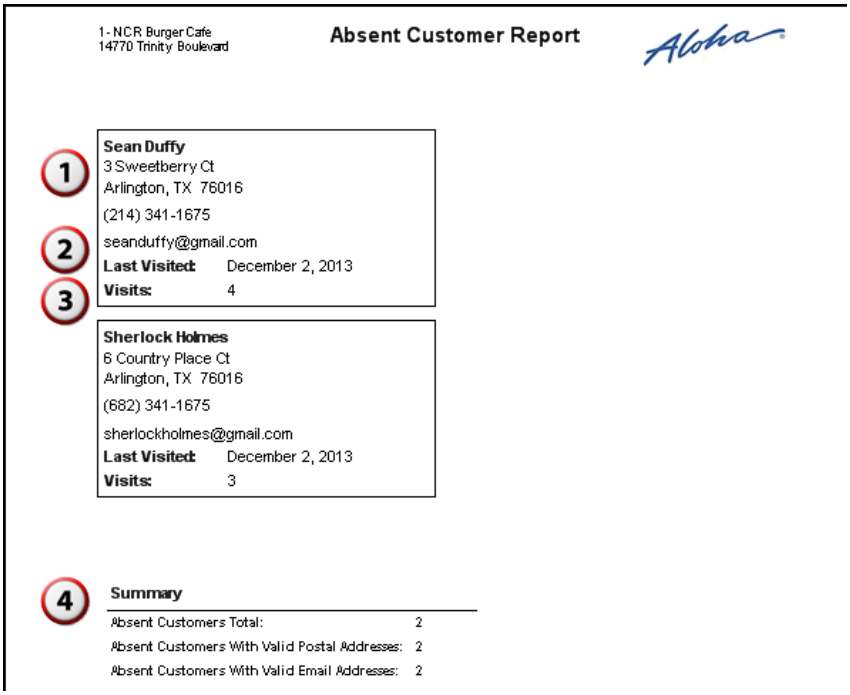

Figure 2 - 15 Absent Customer Report

#	Column	Description
1.	**Customer Information**	The customer name, address, phone number, and email address.
2.	**Last Visited**	The last date the customer placed an order.
3.	**Visits**	The total number of orders by the customer.
4.	**Summary**	The total number of absent customers as well as the number of the total number of absent customers with postal addresses and email addresses.

1. On the Reports menu, select the **Absent Customer** report. The Absent Customers dialog box

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appears.

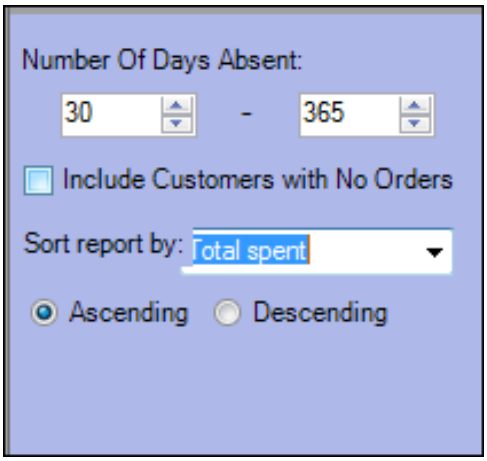

Figure 2 - 16 Absent Customers Dialog Box

2. Select the **range** of days for which a customer did not visit the restaurant to include in the report.
3. Select **Include Customers with No Orders** to include any customers that had no orders submitted.
4. Select the **sort settings** from the 'Sort report by' drop-down list to drill down and filter the Absent Customer report. Select from Last name, First name, Total spent, Number of orders, Average spent, or Last order date.
5. Select either **Ascending** or **Descending** to sort the customer by A-Z or Z-A.
6. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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Top Customer report

The Top Customer report allows you to identify those customers with the most visits within a specified time frame. You can filter the report to exclude customers who have not ordered from you recently and you can set a minimum number of orders from a customer to be considered a top customer.

Figure 2 - 17 Top Customer Report

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A summary appears at the bottom of the report, which provides the total number of top customers according to your defined criteria and the number of top customers with valid postal and email addresses.

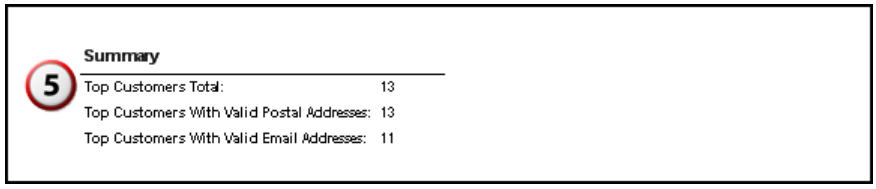

Figure 2 - 18 Top Customer Report Summary

#	Column	Description
1.	**Customer Information**	The customer name, address, phone number, and email address.
2.	**Last Visited**	The last date the customer placed an order.
3.	**Total Visits**	The total number of orders by the customer.
4.	**Total Spent**	The total amount of money customers spent at your operation.
5.	**Summary**	The total number of top customers, as well as the number of top customers with postal addresses and email addresses.

1. On the Reports menu, select the **Top Customer** report. The 'Top Customers' dialog box appears.

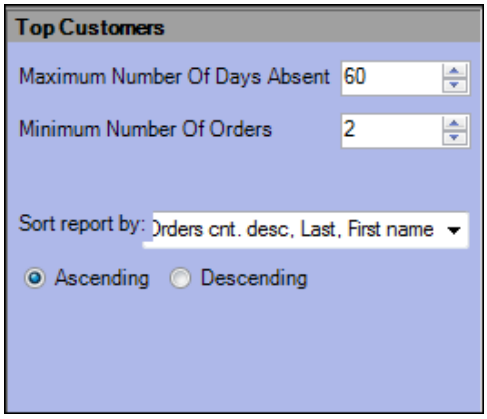

Figure 2 - 19 Top Customers Dialog Box

2. Select the **number of days** in which a customer has not ordered from you in 'Maximum Number of Days Absent.'
3. Select the **number of orders** that a customer has placed to qualify for inclusion as a top customer in 'Minimum Number Of Orders.'

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4. Select the **sort settings** from the 'Sort report by' drop-down list to drill down and filter the Top Customers report. Select from Orders count, description, Last, First name, Total spent, Number of orders, Average spent, or Last order date.
5. Select either **Ascending** or **Descending** to sort the customer by A-Z or Z-A.
6. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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Customer Detail report

The Customer Detail report allows you to search for and view the orders for a customer. The system displays orders from newest to oldest. The Customer Detail report does not export. You can also

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select a customer in the customer search screen on the Aloha Takeout FOH, and then touch Repeat Order to access the Previous Orders screen for the selected customer.

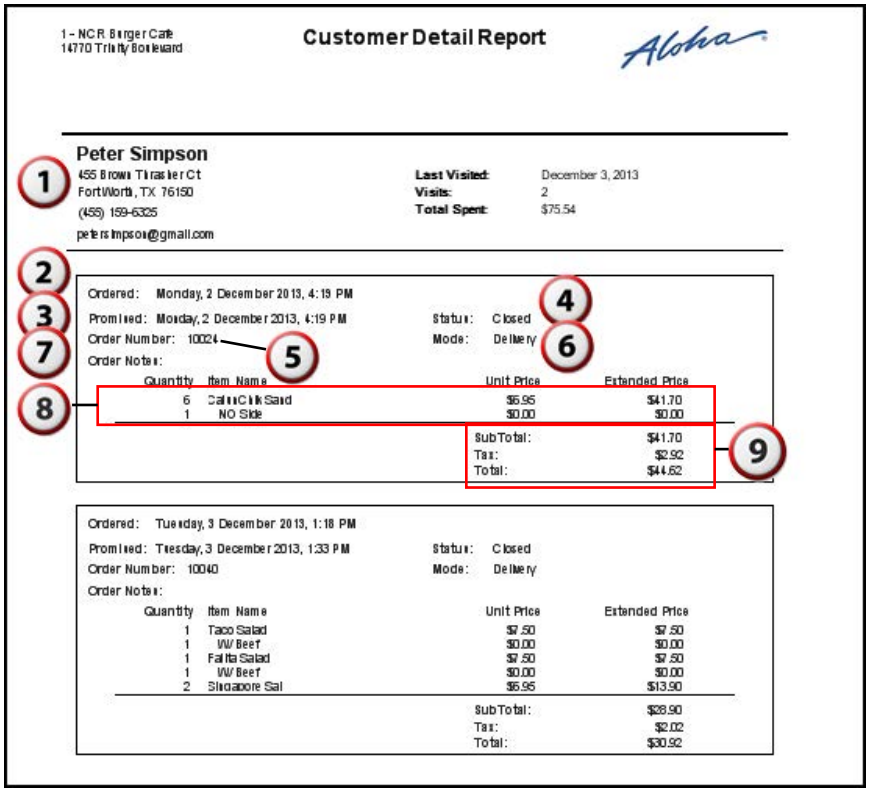

Figure 2 - 20 Customer Detail Report

#	Column	Description
1.	**Customer Information**	The customer name, address, phone number, email address, last visit, total number of visits, and total amount of money spent at your operation.
2.	**Ordered**	The date and time the order was entered into the system.
3.	**Promised**	The promise time for the order.
4.	**Status**	The status of the order.
5.	**Order Number**	The system-generated order number.
6.	**Mode**	The order mode applied to the order.
7.	**Order Notes**	Any order notes entered into the system.
8.	**Order Details**	The item ordered, the quantity of each item ordered, the unit price, and the extended price.
9.	**Order Total**	The subtotal, tax, and total for the order.

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1. On the Reports menu, select the **Customer Detail** report. The 'Customer Lookup' dialog box appears.

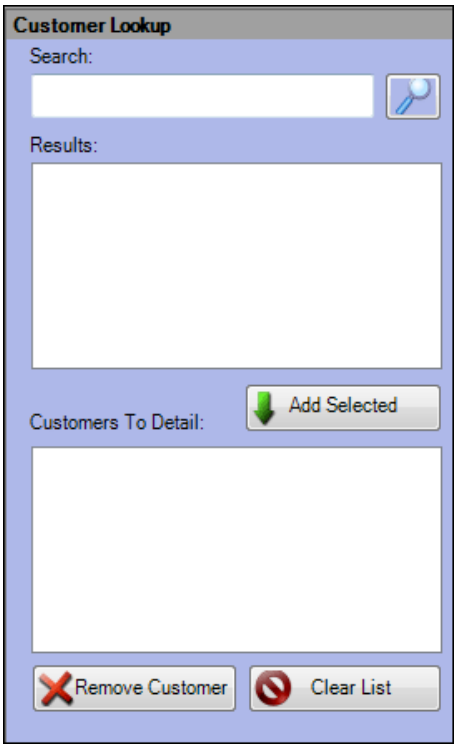

Figure 2 - 21 Customer Lookup Dialog Box

2. Type a **name** to use as search criteria and then click the **magnifying glass** to initiate the search.
3. In the 'Results' box, select the **desired customer** and click **Add Selected** to move the customer to the 'Customers To Detail' box. To remove a customer from the 'Customers To Detail' box, select the desired customer and click **Remove Customer**, or click **Clear List**.
4. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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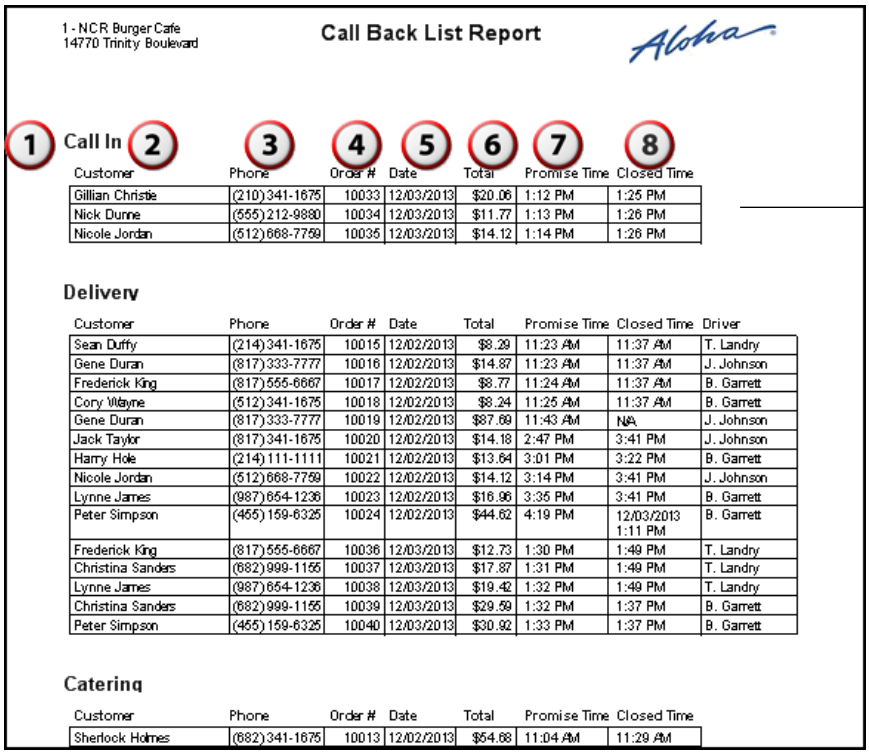
Call Back List report

The Call Back List report lists customers who ordered from you within a selected date or range of dates. You may want to use this report to ensure your customers received excellent service or to proactively address any issues.



1 - NCR Burger Cafe
14770 Trinity Boulevard

Call Back List Report

Aloha

Call In

Customer	Phone	Order #	Date	Total	Promise Time	Closed Time
Gillian Christie	(210) 341-1675	10033	12/03/2013	$20.06	1:12 PM	1:25 PM
Nick Dunne	(555) 212-9880	10034	12/03/2013	$11.77	1:13 PM	1:26 PM
Nicole Jordan	(512) 668-7759	10035	12/03/2013	$14.12	1:14 PM	1:26 PM

Delivery

Customer	Phone	Order #	Date	Total	Promise Time	Closed Time	Driver
Sean Duffy	(214) 341-1675	10015	12/02/2013	$8.29	11:23 AM	11:37 AM	T. Landry
Gene Duran	(817) 333-7777	10016	12/02/2013	$14.87	11:23 AM	11:37 AM	J. Johnson
Frederick King	(817) 555-6667	10017	12/02/2013	$8.77	11:24 AM	11:37 AM	B. Garrett
Cory Wayne	(512) 341-1675	10018	12/02/2013	$8.24	11:25 AM	11:37 AM	B. Garrett
Gene Duran	(817) 333-7777	10019	12/02/2013	$87.69	11:43 AM	N/A	J. Johnson
Jack Taylor	(817) 341-1675	10020	12/02/2013	$14.18	2:47 PM	3:41 PM	J. Johnson
Harry Hole	(214) 111-1111	10021	12/02/2013	$13.64	3:01 PM	3:22 PM	B. Garrett
Nicole Jordan	(512) 668-7759	10022	12/02/2013	$14.12	3:14 PM	3:41 PM	J. Johnson
Lynne James	(987) 654-1236	10023	12/02/2013	$16.96	3:35 PM	3:41 PM	B. Garrett
Peter Simpson	(455) 159-6325	10024	12/02/2013	$44.62	4:19 PM	12/03/2013 1:11 PM	B. Garrett
Frederick King	(817) 555-6667	10036	12/03/2013	$12.73	1:30 PM	1:49 PM	T. Landry
Christina Sanders	(682) 999-1155	10037	12/03/2013	$17.87	1:31 PM	1:49 PM	T. Landry
Lynne James	(987) 654-1236	10038	12/03/2013	$19.42	1:32 PM	1:49 PM	T. Landry
Christina Sanders	(682) 999-1155	10039	12/03/2013	$29.59	1:32 PM	1:37 PM	B. Garrett
Peter Simpson	(455) 159-6325	10040	12/03/2013	$30.92	1:33 PM	1:37 PM	B. Garrett

Catering

Customer	Phone	Order #	Date	Total	Promise Time	Closed Time
Sherlock Holmes	(682) 341-1675	10013	12/02/2013	$54.68	11:04 AM	11:29 AM

You can add custom columns for questions you typically ask your guests.

Figure 2 - 22 Call Back List Report

#	Column	Description
1.	**Order Mode**	The order mode applied to the order. The report groups the data by order mode.
2.	**Customer**	The customer name.
3.	**Phone**	The customer phone number.
4.	**Order #**	The Aloha POS order number.
5.	**Date**	The delivery date for the order.
6.	**Total**	The total of the order.
7.	**Promise Time**	The promised time of the order.
8.	**Closed Time**	The time the order was closed within the Aloha POS.

1. On the Reports menu, select the **Call Back List** report. The Call Back List report settings dialog

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box appears.

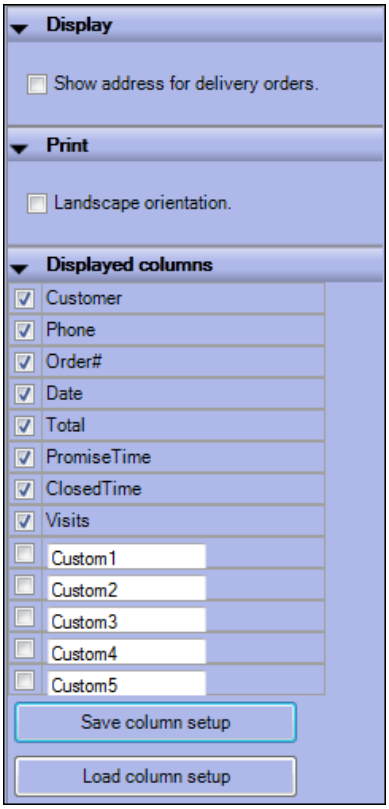

Figure 2 - 23 Customer Lookup Dialog Box

2. Select **Show address for delivery orders** to include the address of each delivery order.
3. Select **Landscape orientation** to display and print the report in landscape format.
4. Select the **columns** to display in the report. Select from Customer, Phone, Order#, Date, Total, Promise Time, Closed Time, and Visits. For the custom selections on Call Back List report settings dialog box, refer to the next section.
5. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

Using custom columns on the Call Back List report

With the Call Back List report, you can create and use custom headers to add additional columns for questions you typically ask your guests when you call them back. For example, "How was your

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food?," "Was your service good?," or "Was the delivery on time?" Typically, the employee writes the response on a hard copy of the report and keeps it stored, or saves the copy as a PDF.

1 - Nick's Bistro
5045 Windward

Call Back List Report

Delivery

Customer	Phone	Order #	Date	Total	Driver	How was your food?
Jakub Oedine	(972) 558-5888	10001	03/31/2016	$28.75	S. DECANTER	

Figure 3 Call Back List Report with Custom Header

You can add up to five custom columns to the Call Back List Report. Once added, save the configuration as a CallBackListColumnSetup.dat file, which you can rename. You can create as many custom files as you want, to use again or send to specific stores in your organization. Once saved and placed in the ATO/Bin directory, you can upload the custom file on demand, and the additional columns appear on the Call Back List Report.

To add a custom column to the Call Back List report:

1. With ATO selected in the product panel, select **Reports > Customers > Call Back List Report**.
2. Under the 'Print' section, select **Landscape orientation** for optimal viewing of the report.
3. Under the 'Displayed columns' section (Figure 2 - 3), select an available **custom option**, and type the **question** to appear as a column . If you do not select the check box, the system keeps the question, but it does not appear on the report.
4. Repeat **Step 3** for any other custom column to add to the Call Back List Report.
5. Exit the **Call Back List Report**.

When you open the report again on a local system, your custom columns remain intact. You can also save your configuration to make it portable. You may want to do this if you want to switch the custom columns out with different questions, or to transport them to another store. You need to save the columns into a CallBackListColumnSetup.dat file, which you can rename, as appropriate.

As a best practice, you should always keep CallBackListColumnSetup.dat in the ATO/Bin directory.

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To save the custom column configuration to the Call Back List report:

1. With ATO selected in the product panel, select **Reports > Customers > Call Back List Report** or you can continue from the previous procedure.
2. Under the 'Displayed columns' section, click **Save column setup** (Figure 2 - 3). The Save As dialog box appears.

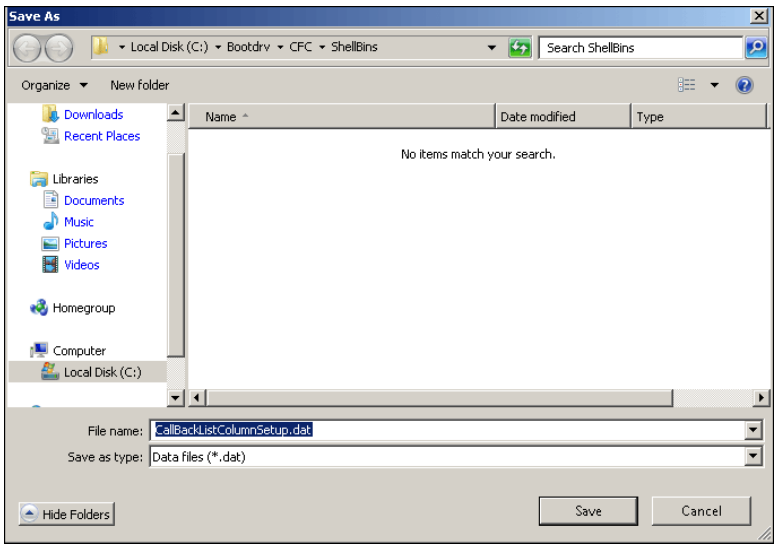

Figure 4 Save As Dialog Box

3. If needed, type a **name** for the custom column configuration. The default name is CallBackListColumnSetup.dat.
4. Navigate to the **directory** in which you want to save the file. We recommend saving the file in the ATO/Bin directory.
5. Click **Save**.

To load a CallBackListColumnSetup.dat file:

1. With ATO selected in the product panel, select **Reports > Customers > Call Back List Report**.
2. Under the 'Displayed columns' section, click **Load column setup**. The Open dialog box appears.
3. If needed, navigate to the **directory** from which to load CallBackListColumnSetup.dat.
4. Select the **file** and click **Open**. The Call Back List Report appears with the added columns.

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Customer Credit report

The Customer Credit report displays a list of customers who have a credit balance with your organization.

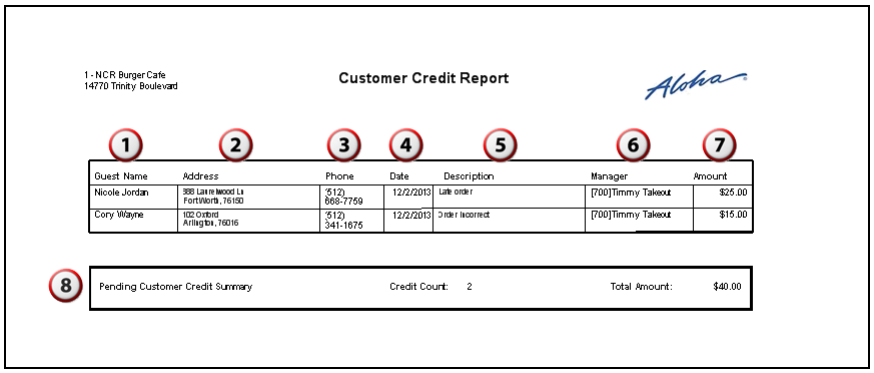

Figure 2 - 1 Customer Credit Report

#	Column	Description
1.	**Guest Name**	The name of the customer.
2.	**Address**	The address of the customer.
3.	**Phone**	The phone number of the customer.
4.	**Date**	The date the credit was issued to the account of the customer.
5.	**Description**	The notes entered at the time the credit was applied to the account of the customer.
6.	**Manager**	The manager who approved the credit to the customer.
7.	**Amount**	The amount of the credit.
8.	**Pending Customer Credit Summary**	The total number of and the total dollar amount of outstanding credits.

1. On the Reports menu, select the **Customer Credit** report. The Report Filters dialog box appears.

Figure 2 - 2 Customer Lookup Dialog Box

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2. Select the **options** to filter the report. Select from **All**, **Created**, **Deleted**, **Modified**, **Expended**, **Rolled Over**, and **Unknown**.
3. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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Catering Summary report

The Catering Summary report displays information regarding any future catering orders for the future date or date range selected.

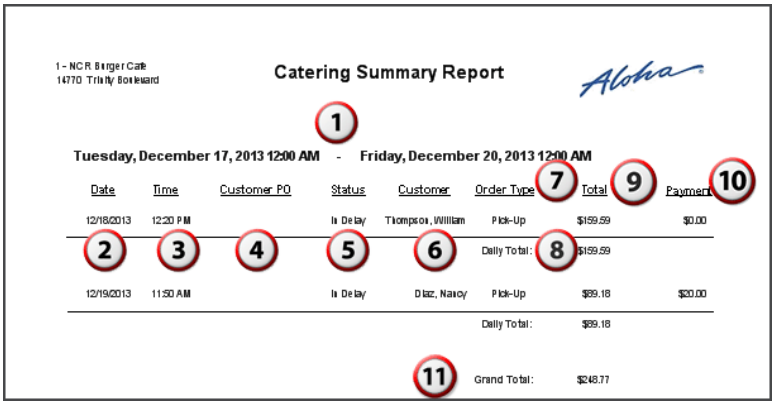

Figure 2 - 3 Catering Summary Report

#	Column	Description
1.	**Selected Date Range**	The date range of the report.
2.	**Date**	The promised date for the catering order.
3.	**Time**	The promised time for the catering order.
4.	**Customer PO**	The purchase order provided by the customer.
5.	**Status**	The status of the order at the time of the printing of the report.
6.	**Customer**	The customer name.
7.	**Order Type**	The particular order mode applied to the order.
8.	**Daily Total**	The calculated total of the orders for the day.
9.	**Total**	The calculated total for the order.
10.	**Payment**	The payments applied to the order.
11.	**Grand Total**	The calculated total for all future catering orders.

There are no report settings available to control the Catering Summary report.

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Catering Detail report

The Catering Detail report allows you to ensure you have enough product to produce the scheduled orders or that you have sufficient time to produce the ordered items. You can print orders on

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separate pages, to assist the kitchen and other employees in organizing, producing, and staging the orders.

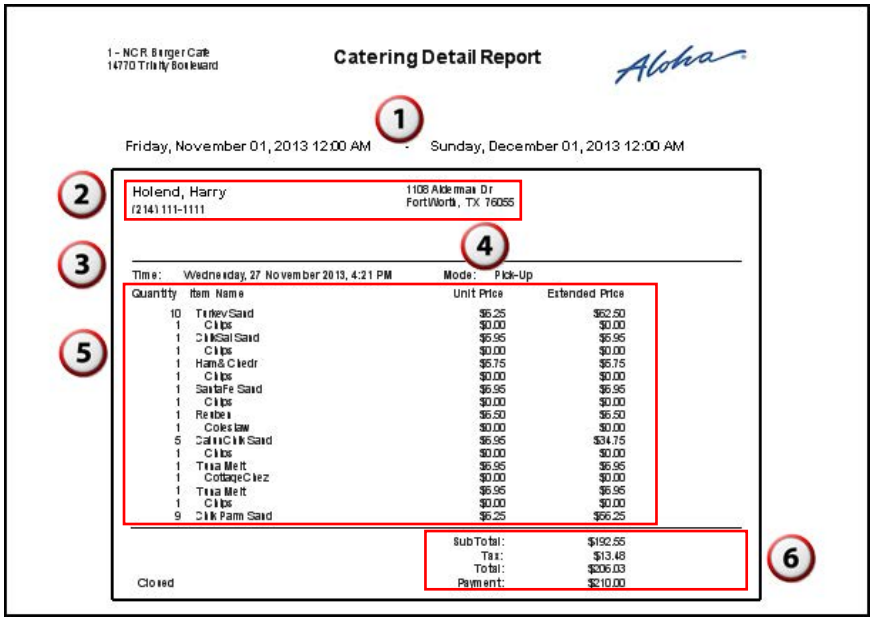

Figure 2 - 4 Catering Detail Report

#	Column	Description
1.	**Selected Date Range**	The selected date range for the report.
2.	**Customer Information**	The name, address, and phone number of the customer.
3.	**Time**	The promised time for the order.
4.	**Mode**	The order mode applied to the order.
5.	**Order Details**	The item and quantity of items ordered, the unit price, and extended price.
6.	**Order Totals**	The subtotal, tax, and total of the order, as well as any payments that have been applied.

1. On the Reports menu, select the **Catering Detail** report. The Catering Detail report settings dialog box appears.

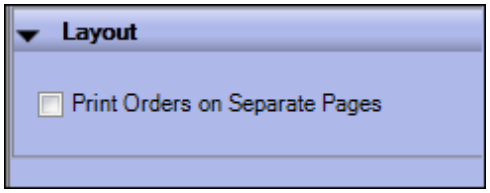

Figure 2 - 5 Catering Detail Report Settings Dialog Box

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2. Select **Print Orders on Separate Pages** to have individual catering orders print on separate pages. Clear this option to have multiple catering orders print on one page.
3. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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Company Detail report

The Company Detail report generates orders from companies that orders from you. You can filter or sort the report by office address. If you do not enter the address for the company, or use a home address, orders for the company do not appear. Use this report to query the ordering history of a company, for such things as thanking frequent customers, checking back with companies who have not ordered from you for a while, and more. The Company Detail report provides detailed

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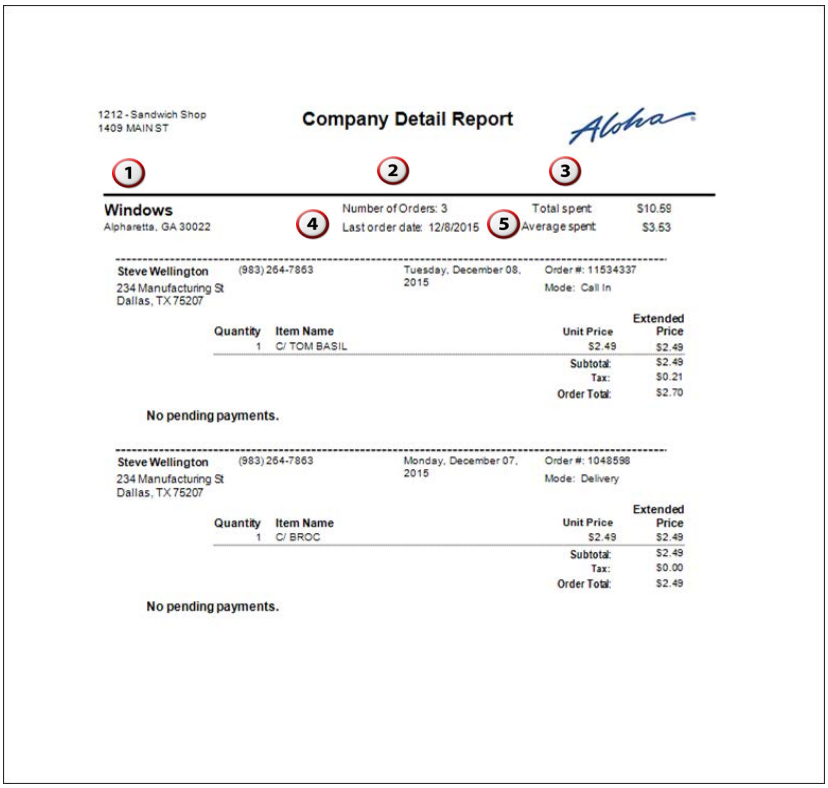
information for each company, by address and then by person from the company who placed the order.



1212 - Sandwich Shop
1409 MAIN ST

Company Detail Report

Aloha

1 2 3

Windows
Alpharetta, GA 30022

4 Number of Orders: 3
Last order date: 12/8/2015

5 Total spent: $10.59
Average spent: $3.53

Steve Wellington (983) 264-7863
234 Manufacturing St
Dallas, TX 75207

Tuesday, December 08, 2015

Order #: 11534337
Mode: Call In

Quantity	Item Name	Unit Price	Extended Price
1	C/ TOM BASIL	$2.49	$2.49
		Subtotal:	$2.49
		Tax:	$0.21
		Order Total:	$2.70

No pending payments.

Steve Wellington (983) 264-7863
234 Manufacturing St
Dallas, TX 75207

Monday, December 07, 2015

Order #: 1048598
Mode: Delivery

Quantity	Item Name	Unit Price	Extended Price
1	C/ BROC	$2.49	$2.49
		Subtotal:	$2.49
		Tax:	$0.00
		Order Total:	$2.49

No pending payments.

Figure 2 - 6 Company Detail Report Example

#	Column	Description
1.	**Company**	The name and address of the company.
2.	**Number of orders**	The number of orders placed by the company.
3.	**Total spent**	The total dollar value of the orders from the company.
4.	**Last order date**	The date of the last order received from the company.
5.	**Average spent**	The average dollar value of the orders from the company.

1. On the Reports menu, select the **Company Detail** report. The Company Detail Controls dialog

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box appears.

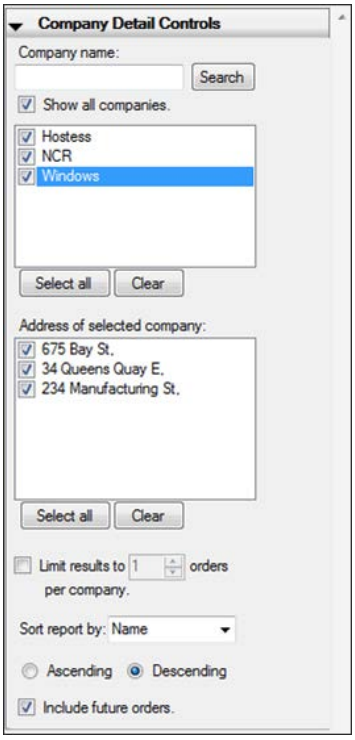

Figure 2 - 7 Company Detail Controls Dialog Box

2. Type the **name** of the company and click **Search** or select **Show all companies** to populate the list of companies defined in the ATO database.
3. Select the **company** to include in the report or click **Select all** to select all the companies. Click **Clear** to exclude all companies in the report.
4. Select the **address** of the selected company to include in the report or click **Select all** to select all addresses associated with the company. Click **Clear** to exclude all addresses for the selected company.
5. Select **Limit results to ___ orders per company** to limit the number of companies to include in the report.
6. Select the **sort method** for the report.
7. Select **Ascending** or **Descending** to sort the report A to Z or Z to A.
8. Select **Include future orders** if you want to include future orders in the report.
9. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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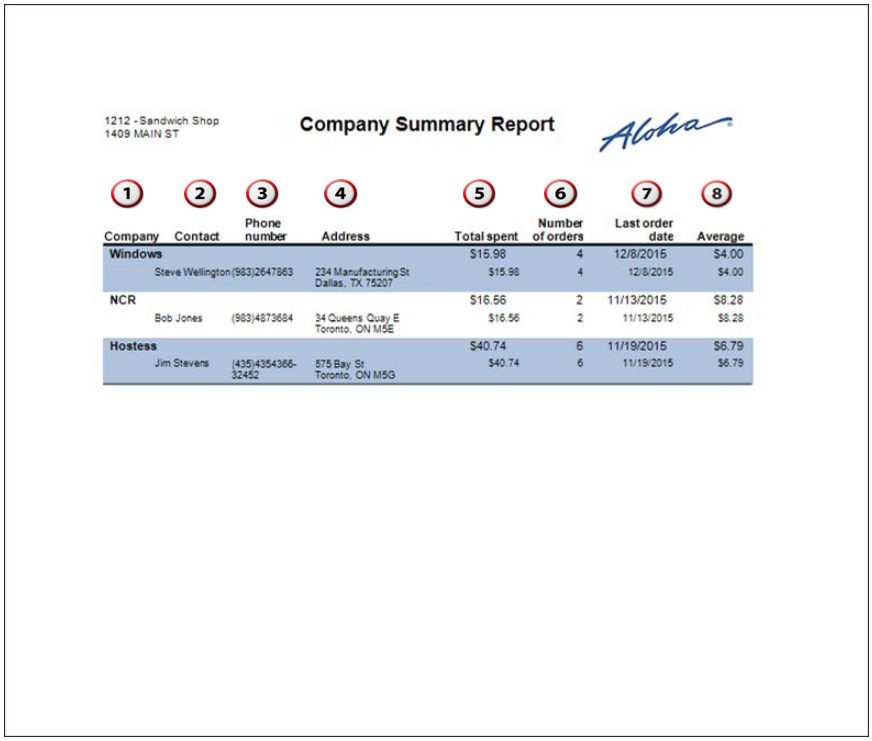
Company Summary report

The Company Summary report provides a high-level snapshot of each company found in the Aloha Takeout database. You can also break down the report by including the orders created by each guest.



1212 - Sandwich Shop
1409 MAIN ST

Company Summary Report

1 Company	2 Contact	3 Phone number	4 Address	5 Total spent	6 Number of orders	7 Last order date	8 Average
Windows				$15.98	4	12/8/2015	$4.00
	Steve Wellington	(983)2647863	234 Manufacturing St Dallas, TX 75207	$15.98	4	12/8/2015	$4.00
NCR				$16.56	2	11/13/2015	$8.28
	Bob Jones	(983)4873684	34 Queens Quay E Toronto, ON M5E	$16.56	2	11/13/2015	$8.28
Hostess				$40.74	6	11/19/2015	$6.79
	Jim Stevens	(435)4354366-32452	575 Bay St Toronto, ON M5G	$40.74	6	11/19/2015	$6.79

Figure 2 - 8 Company Summary Report Example

#	Column	Description
1.	**Company**	The name and address of the company.
2.	**Contact**	The name of the guest who created the order.
3.	**Phone number**	The phone number of the company.
4.	**Address**	The address of the company.
5.	**Total spent**	The total dollar amount spent by the company.
6.	**Number of orders**	The total number of orders created by the company.
7.	**Last order date**	The date of the last order created by the company.
8.	**Average**	The average dollar amount of orders created by the company.

1. On the Reports menu, select the **Company Summary** report. The Company Summary Controls

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dialog box appears.

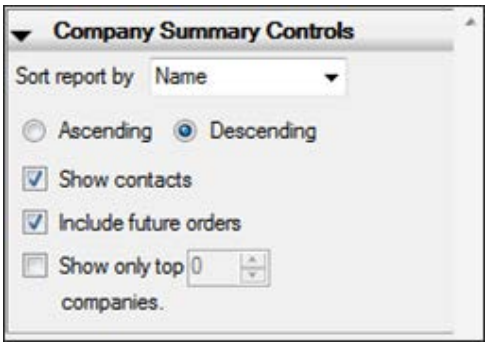

Figure 2 - 9 Company Detail Controls Dialog Box

2. Select the **sort method** for the report.
3. Select **Ascending** or **Descending** to sort the report A to Z or Z to A.
4. Select **Include future orders** to include future orders in the report.
5. Select **Show only top ___ companies** to include a specific number of companies in the report.
6. Click in the Report Preview toolbar to run the report. The report appears in the Report Preview screen.

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Aloha Takeout, Report Guide

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