Feature Focus Guide:
Source and Destination

Core Product: Aloha Takeout
Last Updated: June 5, 2024

Contents

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Revision Record

Date	Version #	Description
Prior to 06/03/2021	v1.0+	Introduced the Source and Destination feature available from the BOH Radiant.Hospitality.AlohaToGo.Configuration.UI utility.
	CFC/AM v19.1+	Migrated the Source and Destination feature to Aloha Configuration Center and Aloha Manager.
	v19.x	Added the requirement to define a Source and Destination record to address all order sources leveraged by an online ordering solution, such as a store website and a delivery marketplace. This enables the online ordering solution to inject orders into ATO. If this record does not exist, order injection takes default values. See "Appendix A: Configuring Source and Destination for online ordering injection only" on page 18.
06/03/2021		Converted the document to use new templates.
01/06/2023		Updated the front cover and back page to reflect new NCR branding.
06/05/2024		Updated document to reflect NCR Voyix branding.

About Source and Destination

Source and Destination at a Glance	
Core Product	Aloha Takeout
Complementary Products	
Separate License Required?	No
Other References	Aloha Takeout Implementation Guide

Figure 1 Source and Destination Screen

In the current world of hospitality, there are many different options for placing and receiving orders, from calling the order in, placing the order using an app on your phone, logging in and placing an order through a web site, speaking directly to an employee at the counter, and using a delivery marketplace to act as an intermediary between you and the restaurant.

There are also many options for how you receive an order. You can elect to pick up your order, dine in at the restaurant, have the order delivered to your address, and more. You can even have them bring the order out to your car, such as in a car-hop environment.

The Source and Destination feature in Aloha® Takeout (ATO) assists you in tracking how consumers submit and receive orders. When it comes to performance metrics, this is valuable data you can use to evaluate staffing needs, identify areas of the restaurant that are not profitable, and reconcile payments from delivery partners. Order source refers to how an order is placed, and order destination refers to how an order is received. When configured, the system prompts the ATO

employee to specify from which source the order originated and to which destination the consumer will receive the order. The restaurant can then run a Source and Destination report.

> **❗ Important**
>
> As of ATO v19.x, you must define a Source and Destination record to address all order sources leveraged by an online ordering solution, such as a store website and a delivery marketplace. This enables the online ordering solution to inject orders into ATO. If this record does not exist, order injection takes default values. See "Appendix A: Configuring Source and Destination for online ordering injection only" on page 18.

The Source and Destination feature was available for configuration in the BOH Radiant.Hospitality.AlohaToGo.Configuration.UI prior to the migration of ATO into Aloha Configuration Center (CFC) and Aloha Manager (AM). You can now configure the Source and Destination feature using CFC or AM v19.1. Moving the configuration of Source and Destination to CFC/AM eliminates the need to perform extra steps to save and refresh data from the Radiant.Hospitality.AlohaToGo.Configuration.UI utility.

> **💡 Tip**
>
> This document provides instructions for how to implement the Source and Destination feature within the configuration management tool. If you are not on a supported version of the configuration management tool, you must use the Radiant.Hospitality.AlohaToGo.Configuration.UI utility.

Configuring Source and Destination

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

Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	Access **Maintenance > Takeout Configuration > Source and Destination** and enable the Source and Destination feature (page 6), add sources, (page 8), add destinations (page 8), and associate each source and destination with an order mode (page 9).
2.	Access **Maintenance > Takeout Configuration > Takeout Settings > Panel Options** and add Source and Destination action buttons to either the Dispatch List or Orders screen to allow you to change a source and destination, when needed. See page 10.
3.	To easily view source and destination entries, access **Maintenance > Takeout Configuration > Takeout Settings > Panel Options** and add a Source and a Destination column to either the Pickup or Orders screen. See page 12
4.	If you integrate Aloha Takeout and Aloha Kitchen, to display the source and destination on a video cell, access **Maintenance > Kitchen Configuration > Header and Footer Layout** and add 'ATO order source' and 'ATO order destination' to a header or footer layout. See page 13.
5.	Access **Utilities > POS > Refresh POS & All Installed Products** to update the information on the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. See page 14.

Enabling the Source and Destination feature

When you enable the Source and Destination feature, you also determine whether to prompt the ATO employee for the source and destination for every order mode or just for specific order modes. For example, you many want to prompt for an order source for a delivery order because it could originate from one of many delivery aggregators, but it may not make sense to prompt for an order source for a call-in order because a call-in order is always submitted by a phone call. If you select 'Always prompt for source' or 'Always prompt for destination,' the system always displays a prompt regardless of the selections made under the Order Modes group bar.

> 📝 **Note**
> Aloha Takeout has preset order modes to which you align POS order modes in Maintenance > Takeout Configuration > Takeout Settings > Order Modes tab.

To enable the Source and Destination feature:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Source and Destination**.

2. Select the **Settings** tab.
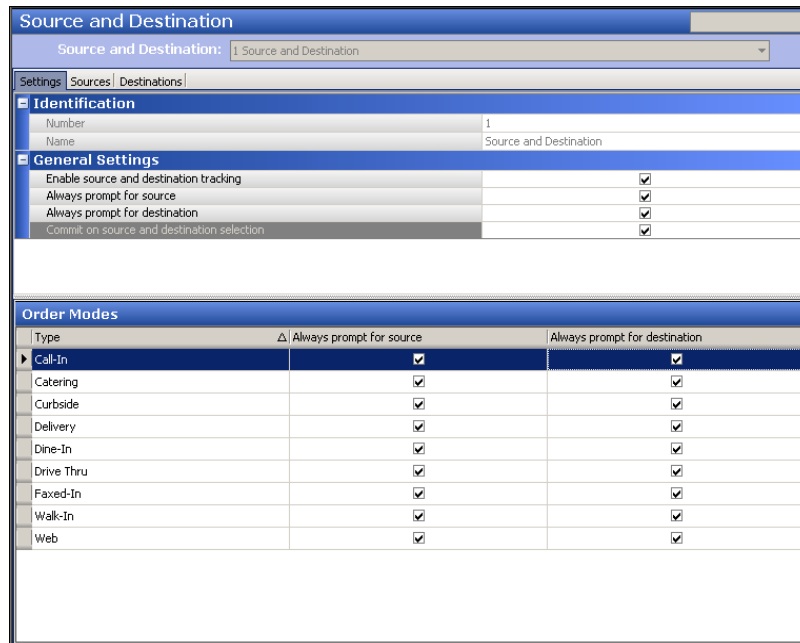
3. Click **New** to create a new record.

Figure 2 Source and Destination - Settings Tab

4. Under the 'General Settings' group bar, select **Enable source and destination tracking** to activate the Source and Destination feature and enable all options under the 'General Settings' tab.

5. Select **Always prompt for source** to prompt you for the source (how the order originated) every time you start a new order, regardless of the order mode.

6. Select **Always prompt for destination** to prompt for the destination (how the guest is to receive the order), every time you enter a new order, regardless of the order mode.

7. Select **Commit on source and destination selection** to enable you to select a source and destination without the need to touch OK to proceed.

8. Under the 'Order Modes' group bar, select **Always prompt for source** to prompt for the source (how the order originated) only when you enter a new order for this order mode.

9. Select **Always prompt for destination** to prompt for the destination (how the guest is to receive the order) only when you enter a new order for this order mode.

10. Continue to the **next procedure**.

Adding order sources

You must add each order source required for indicating from where an order originates. If the order source you need is not available, you can add up to 20 custom order sources. For example, if you use a new delivery partner that is not in the list, enter the partner as a custom order source.

To make order sources active:

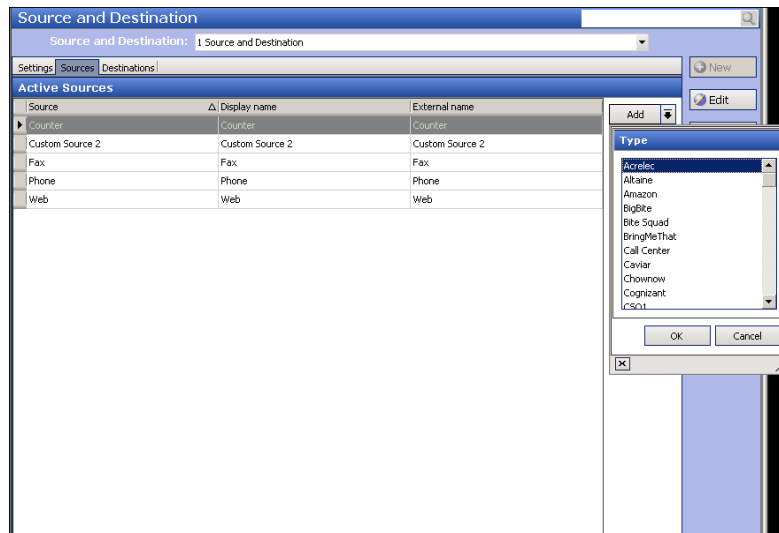1. Continuing from the previous procedure, select the **Sources** tab.

Figure 3 Source and Destination - Sources Tab

2. Under the 'Active Sources' group bar, click the **Add** drop-down arrow, select an **order source**, and click **OK**. A new row appears.

3. If needed, type a **name** to appear on the ATO FOH for the selected order source in 'Display name.' Typically, you keep the same name of the order source; however, if you are adding a custom order source that is not defined in Aloha Takeout, change the name to reflect the name of the order source.

4. If needed, type a **name** to appear in the API call for the selected order source in 'External name.' Typically, this column is for an API user and used by external applications.

5. Repeat steps **2 through 4** for any other order source you want to add.

6. Continue to the **next procedure**.

Adding destinations

You must add each destination required for indicating the supported methods by which you allow consumers to receive orders. If the destination you need is not available, you can add up to 20 custom destinations.

To make order destinations active:

1. Continuing from the previous procedure, select the **Destinations** tab.
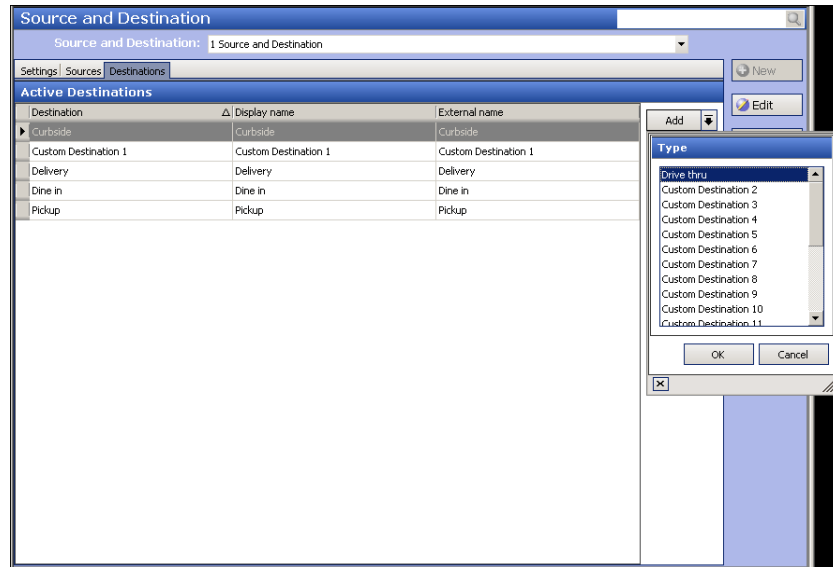

Figure 4 Source and Destination - Destinations Tab

2. Under the 'Active Destinations' group bar, click the **New** drop-down arrow, select a **destination** from the list, and click **OK**. A new row appears.

3. If needed, type a **name** to appear on the ATO FOH for the selected destination in 'Display name.' Typically, you keep the same name of the destination; however, if you are adding a custom destination that is not defined in Aloha Takeout, change the name to reflect the name of the destination.

4. If needed, type a **name** to appear in the API call for the selected destination in 'External name.' Typically, this column is for an API user and used by external applications.

5. Repeat steps **2 through 4** for any other destination you want to add.

6. Continue to the **next procedure**.

Associating each source and destination with an order mode

On the Matrix tab, you associate each source and destination with an order mode. A single order mode may have one or more sources or destinations and you must have a default source and destination defined.

To associate each source and destination with an order mode:

1. Continuing from the previous procedure, select the **Matrix** tab.
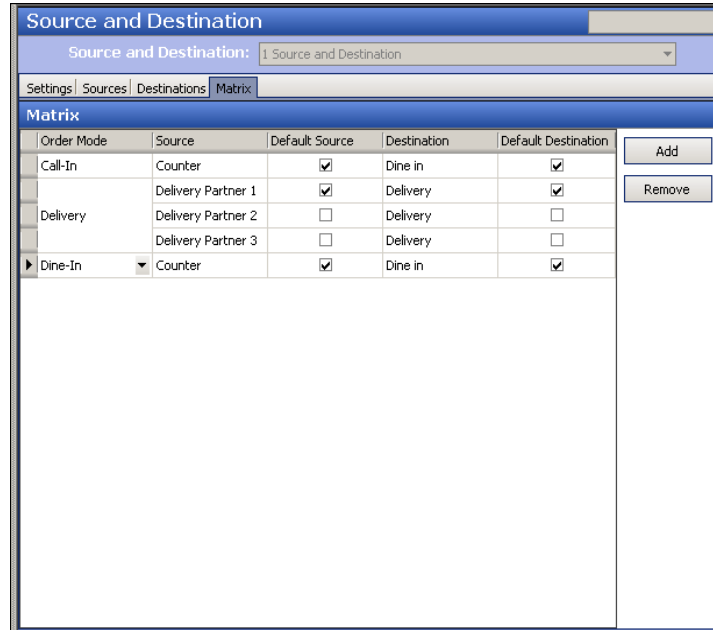

Figure 5 Source and Destination - Matrix Tab

2. Under the 'Matrix' group bar, click **Add**. A new row appears for edit.
3. Select an **order mode** from the 'Order Mode' drop-down list.
4. Select an **order source** from the 'Source' drop-down list.
5. Select **Default Source** if this is the default source selection for the selected order mode.
6. Select a **destination** from the 'Destination' drop-down list.
7. Select **Default Destination** if this is the default destination for the selected order mode.
8. Repeat steps **2 through 7** for each association to include in the matrix.
9. Click **Save** and exit the **Source and Destination** function.

Configuring the ability to change a source or destination

Sometimes it may be necessary to change the selected source or destination for an order. For example, you may have an order mode configured to not prompt for a source or destination during the initial entry, or you entered a wrong source or destination. To allow you to change a source or destination, add the Change Source and Change Destination action buttons to one or all of the following screens: Dispatch, Dispatch List, and Orders.

To configure the ability to change a source or destination:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Panel Options**.

2. Select the **Dispatch > Actions** tab or **Dispatch List > Actions** tab or **All Orders > Actions** tab.

3. Click the **Add** drop-down arrow, select **Change Source** or **Change Destination**, and click **OK**.
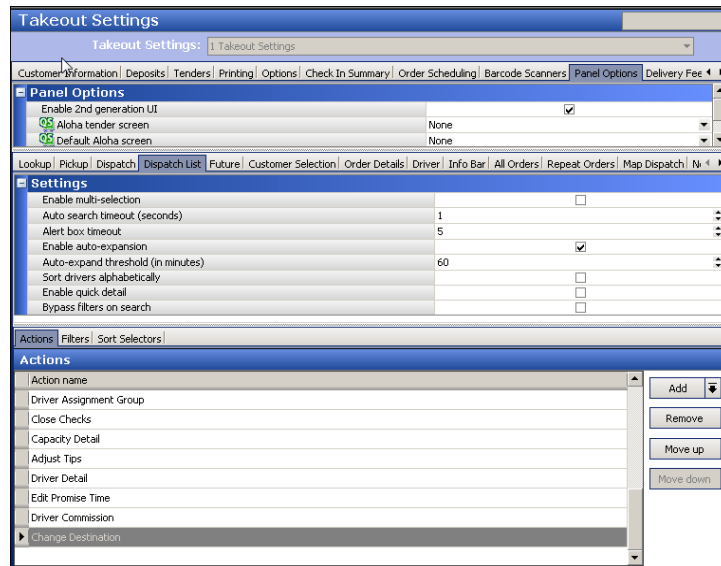

Figure 6 Panel Options - Dispatch List Tab - Actions Tab

4. Click **Move Up** and **Move Down** to arrange the location of the action button to fit your needs.

5. Repeat this **procedure** to add the Change Source or Change Destination action buttons to another screen.

6. Continue to the next **procedure**.

Configuring the source and destination to appear in ATO

You can add a Source column and Destination column on the FOH Pickup and the FOH Orders screen. This allows the ATO employee, such as a bagger, to easily see from which source the order originated and from which destination the consumer receives the order.
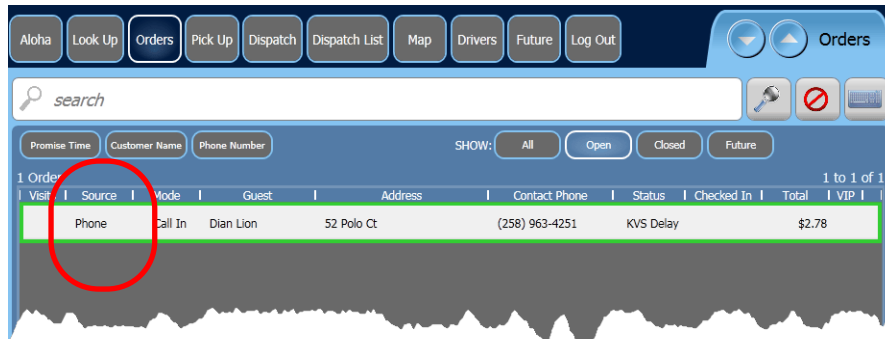

Figure 7 FOH Order Screen - Source Column

To configure Source and Destination columns to appear in ATO:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Panel Options**.

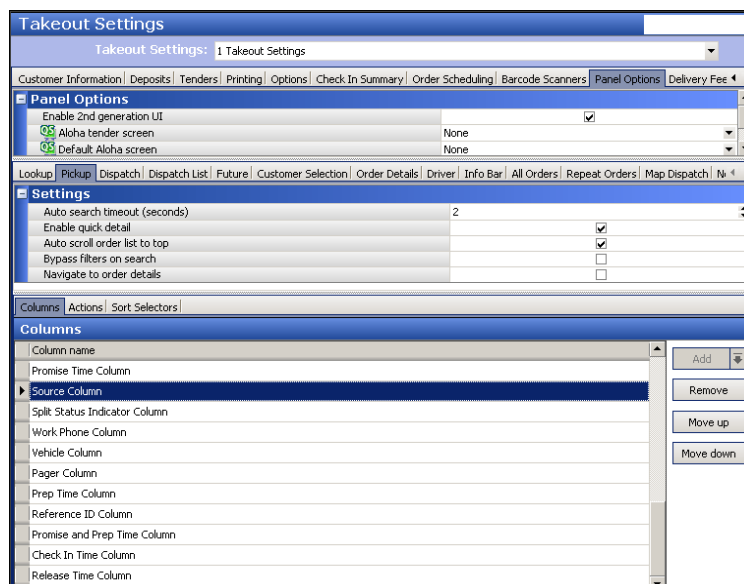2. Select the **Pickup > Columns** tab or **All Orders > Columns** tab.

Figure 8 Panel Options - Pickup Tab - Columns Tab

3. Click the **Add** drop-down arrow, select **Source Column** or **Destination Column**, and click **OK**.

4. Click **Move Up** and **Move Down** to arrange the location of the column to fit your needs.

5. Repeat this **procedure** to add the source and designation columns to another screen.

6. Continue to the next **procedure**.

Configuring the source and destination to appear in AK

When you integrate Aloha Takeout and Aloha Kitchen (AK), you can configure the source and destination to appear on the video cell in AK. You may use this to allow the kitchen staff to prioritize orders for delivery partners.

> 📖 **Reference**
>
> You must integrate Aloha Takeout and Aloha Kitchen to configure the source and destination to appear in AK. Otherwise, no value appears in Aloha Kitchen. You must also use Aloha Takeout v15.2, or later, and Aloha Kitchen v16.1, or later, to use this feature. Refer to the Aloha Takeout and Aloha Kitchen Integration Guide - HKS327 for information on integrating the two products.

To configure the source and destination to appear in AK:

1. With Aloha Kitchen selected in the product panel, select **Maintenance > Kitchen Configuration > Header and Footer Layout**.

2. Select the **layout** on which to add the element from the drop-down list.
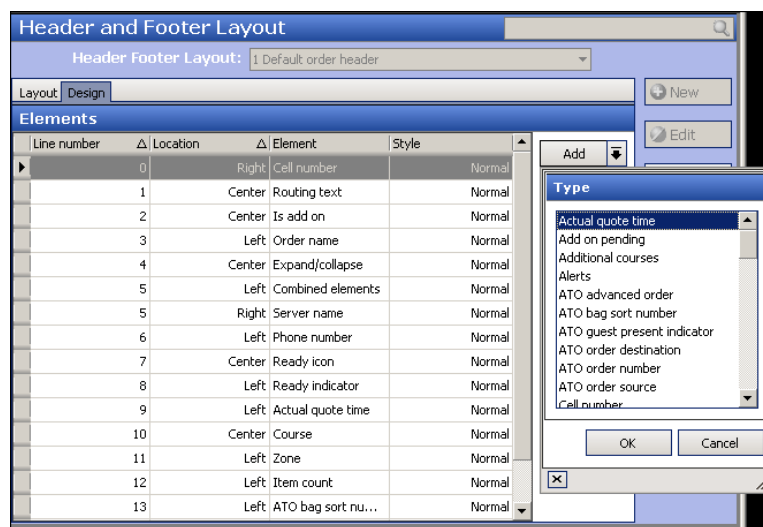
3. Select the **Design** tab.

Figure 9 Header and Footer Layout - Design Tab

4. Click the **Add** drop-down arrow, select **ATO order source** and click **OK**.

5. Click the **Add** drop-down arrow, select **ATO order destination**, and click **OK**.

6. Configure the **line number**, **location**, and **style** for the 'ATO order source' and 'ATO order destination' elements.

7. Click **Save**.

8. Repeat this **procedure** for other layouts for which you need to add the 'ATO order source' and 'ATO order destination' elements.

9. Exit the **Header and Footer Layout** function.

Refreshing data

After all settings are in place in Aloha Manager, you must select Utilities > POS > Refresh POS & All Installed Products to transfer the new information to the FOH terminals, or you can wait for the the End-of-Day (EOD) process to refresh the data for you. If you refresh the data prior to the EOD process, select 'Automatically restart all POS terminals' and click OK to continue. After the data refresh operation completes, 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 ATO Source and Destination

Depending on the order modes you configure to require a source and destination selection, the Select Source/Destination screen appears when you start a new order.

> **Tip**
> This section is not applicable to using the Source and Destination feature for an online ordering solution only.

1. Start an **Aloha Takeout order** for an order mode for which you require the selection of an order source or destination. The Select Source/Destination screen appears.
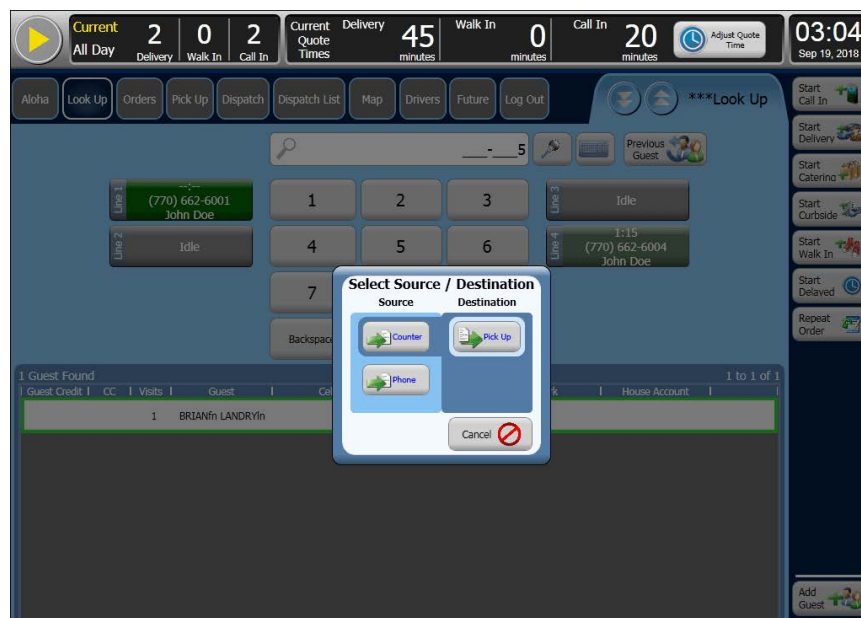

Figure 10 Select Source/Destination Screen

2. Touch the **order source** from which the order originated, if available.
3. Touch the **destination** for how the consumer will receive the order, if available.
4. Touch **OK** to dismiss the screen, if required. The system may automatically dismiss the screen when you select an order source or destination.
5. Complete the **Aloha Takeout order**, as normal.

If you need to change the source or destination, touch the **Change Source** or **Change Destination** button from either the Dispatch, Dispatch List, or Order screen. The Select Source/Destination screen appears (Figure 10). Follow the same procedure for selecting a source or destination with a new order to override the previously selected order source or destination.

Reporting ATO Source and Destination

At the time of this writing, the Source and Destination report is not available in the configuration management tool. Use the Radiant Report Viewer utility to run and view the report.

Figure 11 Source and Destination Report

Column	Description
Source	The order source.
Destination	The destination.
Customer Name	The name of the customer.
Phone Number	The phone number of the customer.
Order Number	The order number for the order.
Total	The check total of the order.
Address	The address of the customer.
Order Mode	The order mode associated with the order.
Order State	The current state of the order when the report was ran.
Order Sub Total	The check total of the order without taxes.
Order Time	The time the order was placed.

Column	Description
Time Closed	The time the check was closed.

To run the Source and Destination report:

1. On the BOH site controller, launch **Radiant.Aloha.Reports.Viewer.Tool.exe** from the Aloha Takeout > Bin directory. The Radiant Report Viewer utility appears.
2. Select **Report > Source and Destination Reports > Source and Destination Report**.
3. Select a **date range** for the report.
4. Under the 'Sources' section, select the **sources** to include in the report, or select **All sources**.
5. Under the 'Destinations' section, select the **destinations** to include in the report, or select **All destinations**.
6. Under the 'Group Report by' section, select either **Day**, **Week**, **Month**, or **Year** to group the data for the report.
7. Select **Show order detail** to customize the columns to appear on the report. This option enables the 'Selected report columns' and 'Available report columns' sections.
8. Select the **columns** in 'Available report columns' and click the **up** or **down arrows** to move the column to the 'Selected report columns' section.
9. Click the **Run the report** command from the tool bar. The Source and Destination report appears.
10. Select **File > Exit** to exit **Radiant Report Viewer**.

Appendix A: Configuring Source and Destination for online ordering injection only

As of ATO v19.x, you must define a Source and Destination record to address all order sources leveraged by an online ordering solution, such as a store website and a delivery marketplace. This enables the online ordering solution to inject orders into ATO. If this record does not exist, order injection takes default values.

This section details the configuration requirements within Aloha Manager and Aloha Configuration Center (CFC) for Source and Destination to address order modes leveraged by an online ordering solution only. If you need to configure Source and Destination for all order sources besides the ones leveraged by an online ordering solution, see "Configuring Source and Destination" on page 6.

Enabling the Source and Destination feature

To use Source and Destination for an online solution only, you need only to enable the feature on the Settings tab.

To configure the Source and Destination feature for online solution only:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Source and Destination**.
2. Select the **Settings** tab.
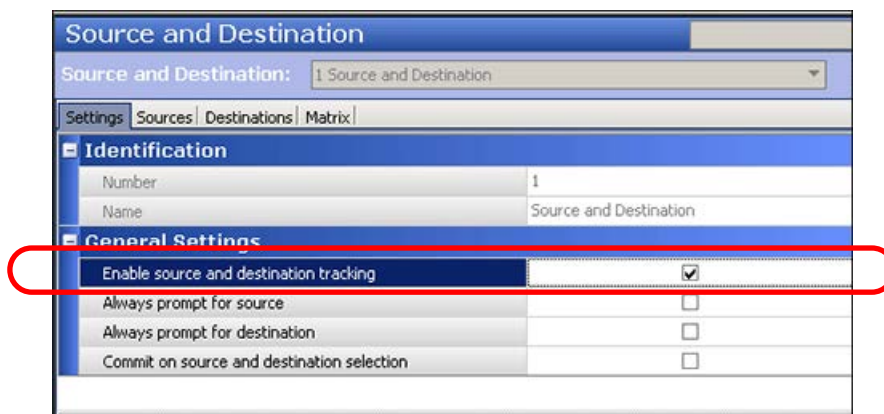3. Click **New** to create a new record.

Figure 12 Source and Destination - Settings Tab

4. Under the 'General Settings' group bar, select **Enable source and destination tracking** to activate the Source and Destination feature.
5. Leave all other **options** on the Settings tab as their default.
6. Continue to the **next procedure**.

Adding order sources

You must add a source record for each order source from which an online order originates. In this example, the Web order source is selected from the Add drop-down list. If an order source you need, such as a new delivery partner, is not available in the drop-down list, enter the partner as a custom order source.

> **Note**
> You can add up to 20 custom order sources.

To add an order source:

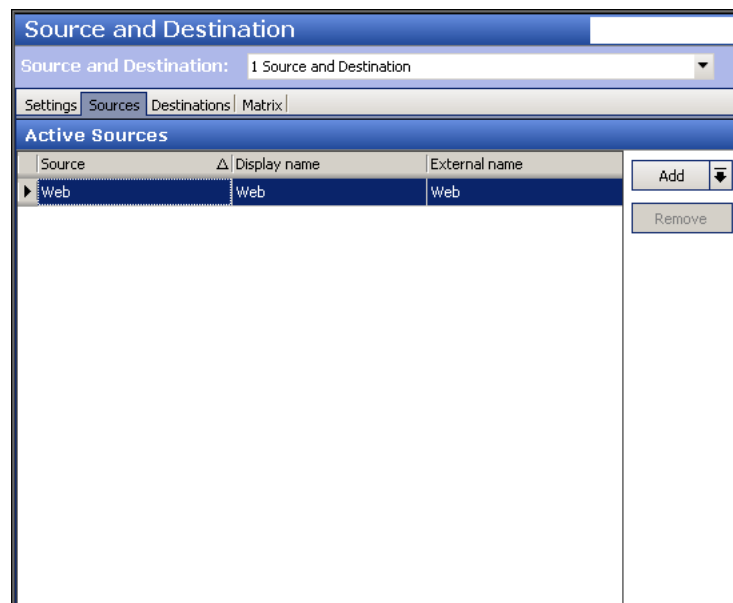1. Continuing from the previous procedure, select the **Sources** tab.

Figure 13 Source and Destination - Sources Tab

2. Click the **Add** drop-down arrow, select an **order source**, such as Web, and click **OK**. A new row appears.
3. Under the 'Active Sources' group bar, leave the default value or type a **name** of your choice in 'Display name' to indicate the type of order source, such as Web.
4. If needed, type a **name** to appear in the API call for the selected order source in 'External name.' Typically, this column is for an API user and used by external applications.
5. Repeat steps **2 through 4** for each order source you need to add.
6. Continue to the **next procedure**.

Adding destinations

You must add a destination record for each method by which you allow consumers to receive an order. If the destination you need is not available in the drop-down list, enter the destination as a custom destination.

> **Note**
> You can add up to 20 custom destinations.

To add a destination:

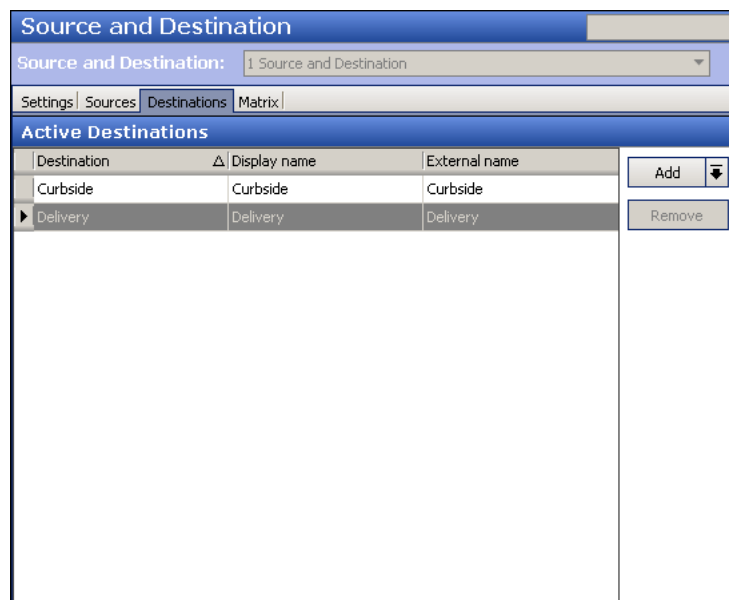1. Continuing from the previous procedure, select the **Destinations** tab.

Figure 14 Source and Destination - Destinations Tab

2. Click the **New** drop-down arrow, select a **destination** from the list, and click **OK**. A new row appears.
3. Under the 'Active Destinations' group bar, leave the **Display name** as the default, or type a display name of your choice.
4. If needed, type a **name** to appear in the API call for the selected destination in 'External name.' Typically, this column is for an API user and is used by external applications.
5. Repeat steps **2 through 4** for each destination you want to add.
6. Continue to the **next procedure**.

Associating each source and destination with an order mode

On the Matrix tab, you associate each source and destination with an order mode. A single order mode may have one or more sources or destinations, and you must have a default source and destination defined.

To associate each source and destination with an order mode:

1. Continuing from the previous procedure, select the **Matrix** tab.

Figure 15 Source and Destination - Matrix Tab

2. Click **Add**. A new row appears for edit.
3. Under the 'Matrix' group bar, select an **order mode**, such as Web, from the 'Order Mode' drop-down list.
4. Select an **order source**, such as Web, from the 'Source' drop-down list.
5. Select **Default Source**.
6. Select a **destination** from the 'Destination' drop-down list.
7. Select **Default Destination** for the most commonly used destination for this source; otherwise, leave this option cleared.
8. Repeat steps **2 through 7** for each association to include in the matrix.
9. Click **Save** and exit the **Source and Destination** function.

Source and Destination, 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