

# Feature Focus Guide: Nested Modifiers

Core Product: Aloha Cloud  
Last Updated: May 30, 2024

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## Revision Record

Date	Version #	Description
03/16/2023	POS v6.4, BO v2023.01	Implemented nested modifiers.
05/28/2024		Updated document to reflect NCR Voyix branding.

## About Nested Modifiers

Modifiers are groups of items used to extend, alter, or further define menu items. Modifier groups have a circular relationship to items in that they are composed of items grouped into a modifier group and then assigned to an item. Aloha Cloud supports 'nested modifiers,' which is the ability to modify menu items in the POS with up to two levels of modifiers. The first level modifies the item. The second level modifies the first level modifier.

Nested modifier selections appear on the POS ticket entry screen, digital receipts, kitchen chits, and the kitchen display system. Also, nested modifiers print and are indented on receipts for easy identification.

### Note

Nested modifiers appear on printed receipts only for POS v6.4 and later.

There are many examples of how you might use nested modifiers to extend, alter, or further define a menu item. This document is specifically targeted to configuring nested modifiers as they apply to the following scenario and assumes you are already familiar with creating items and modifier groups, and, to better demonstrate the requirements.

**SCENARIO:** You offer a Steak Dinner Meal that comes with any combination of three sides: Salads, Fries, and Vegetables (first level modifier). One of the three side choices is a salad for which the guest must make a dressing choice (second level modifier).

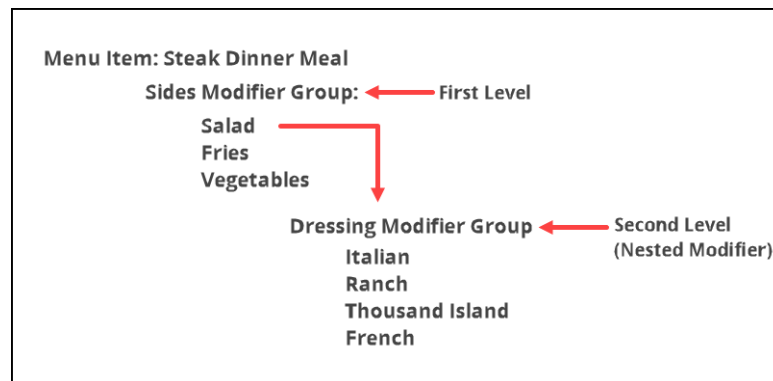


Figure 1 Nested Modifier Example

## Configuring Nested Modifiers

This section details the configuration requirements within Aloha Cloud Back Office for nested modifiers, specifically how to configure the Steak Dinner Meal example.

Procedure at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	Access <b>Back Office &gt; Settings &amp; Privacy &gt; Company Information &gt; Company Options</b> and enable nested modifiers. See <a href="#">page 6</a> .
2.	Access <b>Menu &gt; Items &amp; Categories</b> and create all items, including the menu items and all modifier items, required to successfully add the Steak Dinner Meal to the guest check with the correct guest selections. See <a href="#">page 7</a> .
3.	Access <b>Menu &gt; Modifiers</b> and create the two modifier groups required for the Steak Dinner Meal sample scenario, Sides and Dressing. See <a href="#">page 12</a> .
4.	Return to <b>Menu &gt; Items &amp; Categories</b> and assign the item modifier group to the Steak Dinner Meal item, and both the item modifier group for the Salad item, as well as the modifier group into which to place the Salad item when it is sold as a modifier item. See <a href="#">page 15</a> .
5.	Access <b>POS &gt; Settings &gt; POS Data Sync</b> to update the information on the FOH terminal. See <a href="#">page 17</a> .

## Enabling nested modifiers

Before you can apply nested modifiers to an item in the POS, you need to enable the feature in Back Office. Enabling the nested modifiers feature has no impact on your ability to configure nested modifiers in Back Office; however, if you do not enable the feature, you are unable to apply nested modifiers to an item in the POS.

### To enable the use of nested modifiers in the POS:

1. Log in to **Back Office** using Company View (All Stores), or select a **specific store**.
2. Select **Settings & Privacy** in the lower left corner of the screen to display the Settings & Privacy menu.
3. Select **Company Information > Company Options**.

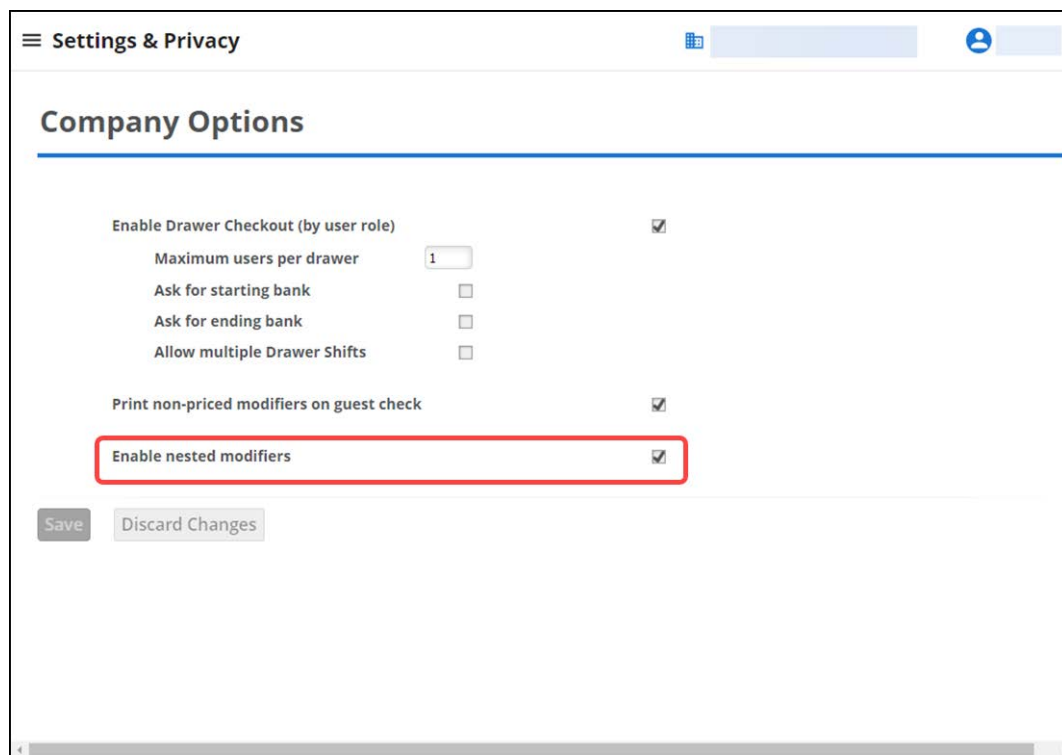


Figure 2 Back Office - Company Options - Enabling nested modifiers

4. Select **Enable nested modifiers** to enable nested modifiers to be applied to items in the POS.
5. Click **Save**.
6. Exit **Company Options**.

## Creating items

To configure the Steak Dinner Meal in the sample scenario requires you to first create all items, including the menu items and all modifier items, required to successfully add the item to the guest check with correct guest selections. To meet the requirements of the sample scenario, add the following items:

Item to create	Type of item
Steak Dinner Meal	menu item
Salad	menu item and modifier item
Fries	menu item and modifier item
Vegetables	menu item and modifier item
Italian	modifier item
Ranch	modifier item
1000 Island	modifier item
French	modifier item

### To create the Steak Dinner Meal menu item:

1. From Back Office, select **Menu > Categories & Items**.
2. Select the BY ITEM tab located at the top of the screen.
3. Click **Add Item** on the right. The Extended Item Setup screen appears.

The screenshot displays the 'Steak Dinner Meal' configuration page. At the top, there are three buttons: 'Basic Item Setup', 'Remove Item', and 'Duplicate'. Below this is a section titled 'General Information' with the following fields and values:

- Category \*: DINNER
- Item Name \*: Steak Dinner Meal
- Routing Group: Kitchen
- Print Priority: 50
- Availability:  This item is active at POS,  Add this item to Favorites
- Description: Steak Dinner Meal - 3 Sides
- Item Type:  Menu Item,  Modifier Item

At the bottom, there is an 'Item Modifiers' section with a button 'Assign Modifier Groups...'. The bottom navigation bar contains four buttons: 'Save', 'Save and Add Another', 'Discard Changes', and 'Close'.

Figure 3 Creating Menu Items

4. Select a **category** from the drop-down list.
5. Type an **item name**, such as Steak Dinner Meal, for the menu item. The item name appears on the POS app on the order entry screen.
6. Select **This item is active at POS** next to 'Availability.'
7. Select **Menu Item** as the 'Item Type.' Do not select Modifier Item since this item does not serve as both a menu item and a modifier item.
8. Do not make any **selections** for 'Item Modifiers,' as you have not yet created the necessary Modifier Groups. You return to this step later in the configuration.



**Tip**

Since this item does not also serve as a modifier item, the 'Modifier Groups' option is not available.

9. Complete the **remaining options** as you would for any other menu item, including the appropriate **tax category** to apply to the item.
10. (Multi-Store only) Click **Assign Stores** to select the stores for which to make the item available and click **Done**. On the item screen, the system identifies the stores to which you assigned the item. If the item is available to all stores, select **All Stores**.
11. Click **Save** and continue to the **next procedure**.



**To create the items that serve as both a menu item and a modifier item, such as Salad, Fries, and Vegetables:**

1. While still in **Menu > Categories & Items**, click **Add Item**. The Extended Item Setup screen appears.

The screenshot shows the 'Salads' configuration screen. At the top, there's a 'Menu' header and a user profile icon. Below that, the title 'Salads' is displayed, along with three buttons: 'Basic Item Setup', 'Remove Item', and 'Duplicate'. A note states '\* Indicates required field.' The 'General Information' section includes: 'Category \*' set to 'SALADS', 'Item Name \*' set to 'Salads', 'Routing Group' set to 'Kitchen', 'Print Priority' set to '50', 'Availability' with a checked box for 'This item is active at POS' and an unchecked box for 'Add this item to Favorites', 'Description' with a text input field containing 'Long Name (130 char max)', and 'Item Type' with checked boxes for 'Menu Item' and 'Modifier Item'. Below this is an 'Item Modifiers' section with a button 'Assign Modifier Groups...'. At the bottom, there are four buttons: 'Save', 'Save and Add Another', 'Discard Changes', and 'Close'.

Figure 4 Creating Salad Menu/Modifier Items

2. Select a **category** from the drop-down list.
3. Type an **item name**, such as Salad. The item name appears on the POS app on the order entry screen.
4. Select **This item is active at POS** next to 'Availability.'
5. Select both **Menu Item** and **Modifier Item** to the right of 'Item Type,' to indicate you sell the item as both a menu item and a modifier item.
6. Do not make any **selections** for 'Item Modifiers' or 'Modifier Groups,' as you have not created the necessary Modifier Groups. You return to this step later in the configuration.
7. Enter the **price** for the menu item in 'Sales Price.' You control the price of the item when sold as a modifier item in the MODIFIER GROUPS function.
8. Complete the **remaining options** as you would for any other menu item, including the appropriate **tax category** for the item when it is sold as a menu item.

9. (Multi-Store only) Click **Assign Stores** to select the stores for which to make the item available and click **Done**. On the item screen, the system identifies the stores to which you assigned the item. If the item is available to all stores, select **All Stores**.
10. Click **Save**.
11. Repeat this **procedure** for **Fries** and again for **Vegetables** to configure the sample scenario.
12. Continue to the **next procedure**.

**To create the items that serve as modifier items only, such as the dressing choices for salad (i.e. Italian, Ranch, 1000 Island, French):**

1. While still in **Menu > Categories & Items**, click **Add Item**. The Extended Item Setup screen appears.

The screenshot shows the 'Italian' item setup screen. At the top, there is a 'Menu' header and a user profile icon. Below the header, there are three buttons: 'Basic Item Setup', 'Remove Item', and 'Duplicate'. The main content area is titled 'Italian' and contains the following fields and options:

- Category \***: A dropdown menu with 'MODIFIER' selected.
- Item Name \***: A text input field containing 'Italian'.
- Routing Group**: A dropdown menu.
- Print Priority**: A numeric input field with '50'.
- Availability**: A checkbox labeled 'This item is active at POS' which is checked, and another checkbox labeled 'Add this item to Favorites' which is unchecked.
- Description**: A text input field with the placeholder 'Long Name (130 char max)'.
- Item Type**: Two checkboxes, 'Menu Item' (unchecked) and 'Modifier Item' (checked).
- Item Modifiers**: A section with a question mark icon and a text input field containing 'Assign Modifier Groups...'.

At the bottom of the screen, there are four buttons: 'Save', 'Save and Add Another', 'Discard Changes', and 'Close'.

Figure 5 Creating Modifier Items

2. Select a **category** from the drop-down list.
3. Type a **name**, such as Italian. The item name appears on the POS app on the order entry screen.
4. Select **This item is active at POS** next to 'Availability.'
5. Select only **Modifier Item** to the right of 'Item Type,' to indicate you sell the item as a modifier item only. Selecting this option enables the Modifier Groups selection.

6. Do not make any **selections** for 'Modifier Groups,' as you have not yet created the necessary modifier groups. You return to this step later in the configuration.



**Tip**

Since this item only serves as a modifier item, you will not make any selections for 'Item Modifiers.'

7. You can enter a **price** for the modifier item in 'Sales Price,' or specify the **price** of the modifier item when you add it to the modifier group in the MODIFIER GROUPS function.
8. Complete the **remaining options** as you would for any other modifier item.
9. (Multi-Store only) Click **Assign Stores** to select the stores for which to make the item available and click **Done**. On the item screen, the system identifies the stores to which you assigned the item. If the item is available to all stores, select **All Stores**.
10. Click **Save**.
11. Repeat **this procedure** for the remaining **dressing choices** required to configure the sample scenario.

## Creating modifier groups

You can create as many modifier groups as necessary for your menu. The following procedure walks you through creating the two modifier groups required for the Steak Dinner Meal sample scenario, Sides and Dressing.

When you configure a modifier group, you specify whether the prompt for the modifier group is to automatically appear during order entry when you add the menu item to the ticket, and how many modifiers, if any, a guest must choose before you can continue.

### To create the modifier groups required to configure the sample scenario:

1. While in **Back Office**, select **Menu > Modifiers**.
2. Click **Add a Modifier Group**, located on the left of the screen. The Add Modifier Group screen appears.

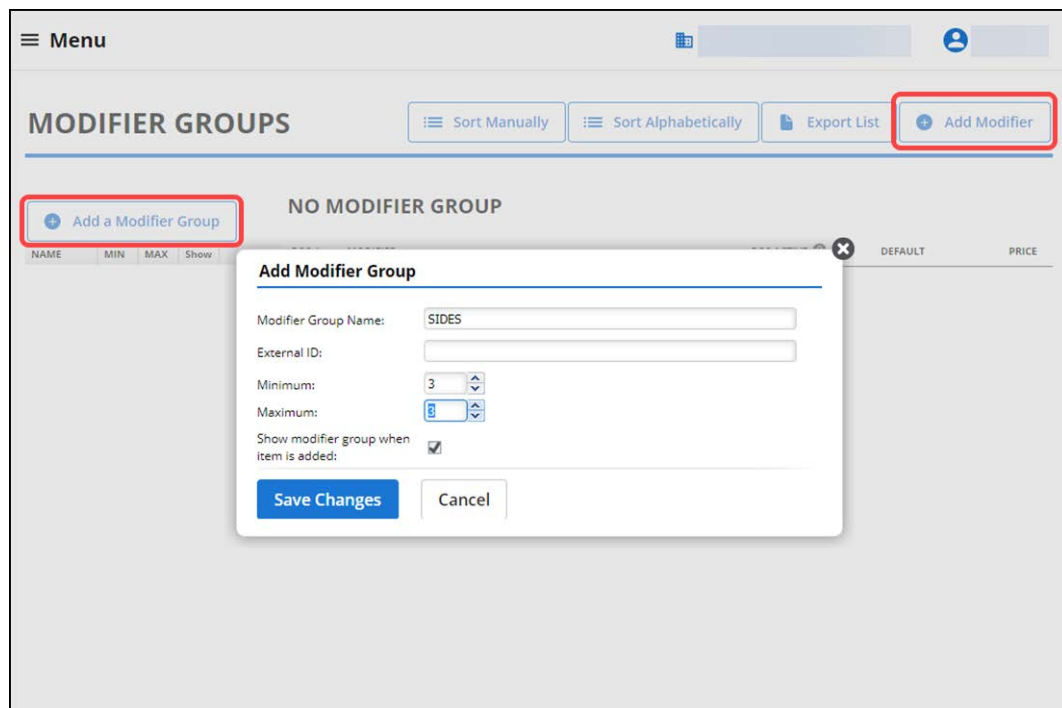


Figure 6 Creating Modifier Groups

3. Type a **name** for the modifier group in 'Modifier Group Name.' In keeping with configuring the sample scenario, type SIDES.



### Tip

All modifier group names appear in all CAPS.

4. (Optional) Assign an **External ID number** to the modifier group.

- If you leave 'External ID' blank, the system populates this option with a system-assigned Master Item ID when you save the item record.
  - If you enter a number for 'External ID,' the number will be different than the Master Item ID number.
5. Enter a **Minimum Quantity** for the modifier group, to define a minimum number of modifier items a guest must select from this modifier group for the item. To configure the sample scenario, type '3' in 'Minimum Quantity' for the SIDES modifier group to indicate the guest must select at least three modifiers from the SIDES modifier group.
  6. Enter a **Maximum Quantity** for the modifier group, to define the maximum number of modifier items a guest can select from this modifier group for the item. To configure the sample scenario, type '3' in 'Maximum Quantity' for the SIDES modifier group to indicate the guest cannot select more than three modifiers from the SIDES modifier group; however, you can add as many modifier items to the SIDES modifier group as you want to allow for item substitutions.
  7. Select **Show modifier group when item is added** to automatically display the modifier group on the order entry screen when the menu item to which it is assigned is added to the ticket; otherwise, you must select the **item** first to display the available modifiers.
  8. Click **Save Changes** to return to the MODIFIER GROUPS screen.
  9. Select the **SIDES modifier group** just created, located at the bottom on the modifier group list on the left.
  10. Click **Add Modifier** on the top right of the screen to display the Add Modifier screen.

**Add Modifier**

Each modifier is also an item, Choose an existing item or create a new one:

Select Item... +

When this item is sold as modifier in modifier group "SIDES", should it be sold with a different price?

Yes, use the following price:

No, sell with the default price (0.00)

When item using modifier group "SIDES" is sold, should this modifier be applied by default?

?  Yes

Save Changes Save & Add Another Cancel

Figure 7 Adding Modifiers to Modifier Groups

11. Select the **first item** to add to the SIDES modifier group, such as Salad, from the drop-down list. The price entered for the item, if any, appears as the default price for the item when sold as a modifier.

12. To designate a different price for the item when it is sold as a modifier, select **Yes, use the following price** and enter the **desired price**.  
-OR-  
Leave the default selection of **No, sell with the default price selected**.  
In keeping with the scenario, select **Yes** and enter '0.00' for the **modifier price**. There is no charge associated with this item when sold with the Steak Dinner Meal.
13. Select **Yes** for 'When item using modifier group "SIDES" is sold, should this modifier be applied by default?' Selecting this option for your most frequently requested modifiers enhances your speed of service and reduces button touches by automatically adding the item to the guest check. You only need to change the modifier on exceptions. When cleared, you must make **modifier selections** and click **Add to Ticket** to add the modifiers to the check.
14. Click **Save Changes**.
15. Repeat **steps 10 through 13** two times to add the **Fries** and **Vegetable** items to the SIDES modifier group.
16. Repeat **steps 2 through 15** for the DRESSING modifier group, but with the following **changes**:
  - Type **Dressing** for the 'Modifier Group Name.'
  - Enter a **Minimum Quantity** of '1' and a **Maximum Quantity** of '0,' to indicate the guest can choose as many dressings as they want from the modifier selection screen, but they must choose at least one.
17. Exit the **Modifiers** function.

## Assigning item modifiers and modifiers groups to items

Now that you have created the necessary modifier groups, return to the Categories & Items function and assign the item modifier group to the Steak Dinner Meal item, and both the item modifier group for the Salad item, as well as the modifier group into which to place the Salad item when it is sold as a modifier item.

### To assign the modifier groups by which you can modify the Steak Dinner Meal item:

1. While in **Back Office**, return to **Menu > Categories & Items**.
2. Locate the **Steak Dinner Meal** item in the list on the left or use the **Search** text box to locate the **item**.
3. Click **Assign Modifier Groups** to the right of Item Modifiers.

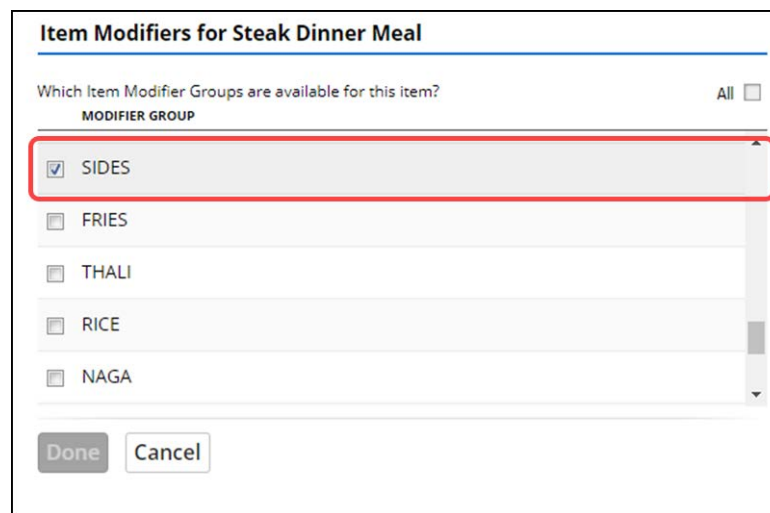


Figure 8 Assigning Steak Dinner Meal Item Modifiers

4. Select **one or more modifier groups** that can modify this item. In keeping with the scenario, select the **SIDES** modifier group and click **Done**

#### Tip

Since this item does not also serve as a modifier item, the 'Modifier Groups' selection screen is not available.

5. Click **Save** and continue to the **next procedure**.

**To assign the modifier groups required for the Salad item:**

1. Locate the **Salad** item in the list on the left or use the **Search** text box to locate the **item**.
2. Click **Assign Modifier Groups** to the right of Item Modifiers.

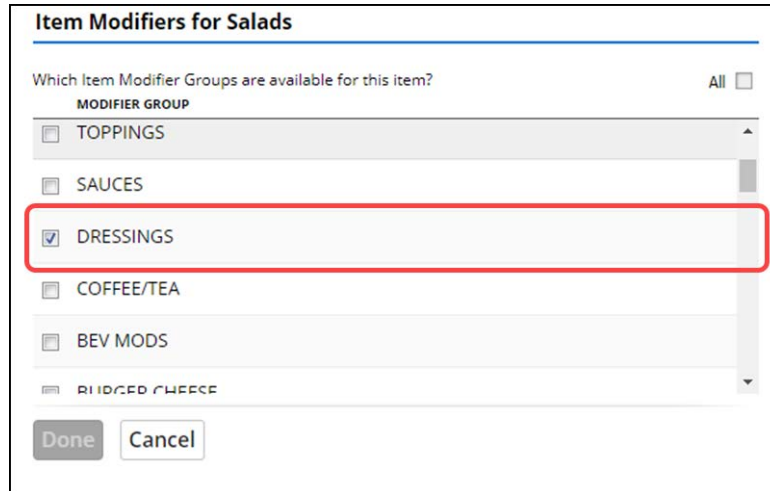


Figure 9 Assigning Salad Item Modifiers

3. Select **one or more modifier groups** that can modify this item. In keeping with the scenario, select the **DRESSINGS** modifier group and click **Done**.
4. Because the Salad item is also sold as a modifier item, click **Assign to Groups** to the right of Modifier Groups.

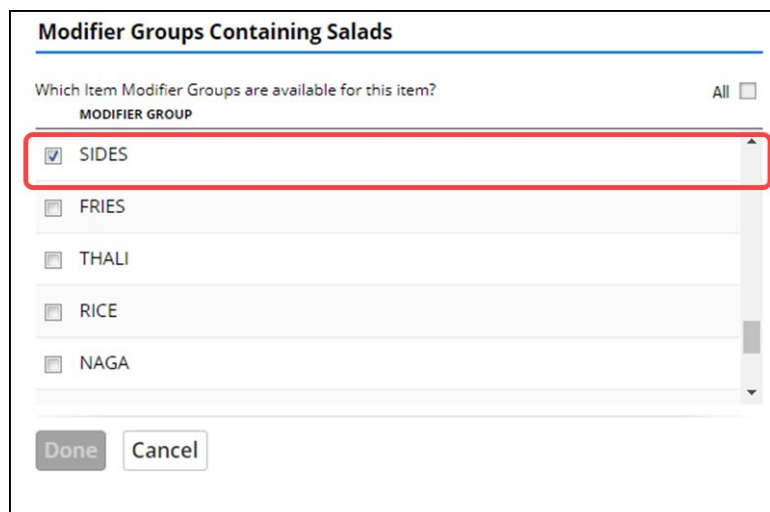


Figure 10 Assigning Salad to Modifier Group

5. Select **one or more modifier groups** into which to add this item. In keeping with the scenario, select the **SIDES** modifier group and click **Done**.



6. Click **Save** and continue to the **next procedure**.

## Performing a data sync

The system syncs data between the device and the Back Office at least every three minutes, and each time an employee logs in to application. You can view the time of the last sync, the time of the next scheduled sync, and even initiate a sync between the device and the Back Office.

### To perform a data sync:

1. At the **POS** home screen, tap the **hamburger menu icon** on the top left to display the slide out menu.
2. Tap **Settings**.

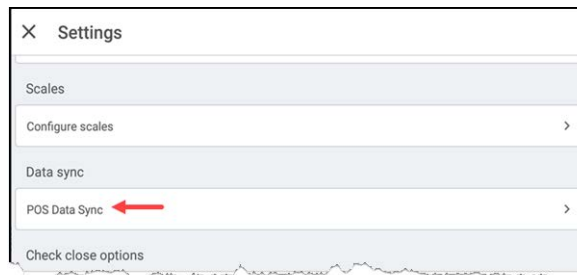


Figure 11 POS Data Sync selection

3. From the Settings screen, under 'Data sync,' tap **POS Data Sync**. The Data Sync screen appears.

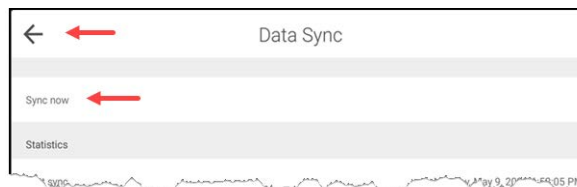


Figure 12 Data Sync Screen

4. Tap **Sync now** to force a data sync. When done, the system returns you to the Settings screen.

## Using Nested Modifiers

The following procedure demonstrates the screen flow that occurs when you use the POS to add the Steak Dinner Meal to a check based on the nested modifier configuration performed for the sample scenario.

### To add the **Steak Dinner Meal** to a check in the POS:

1. Log in to the **POS**.
2. Tap **Point-of-Sale** and start a **new order** as normal.

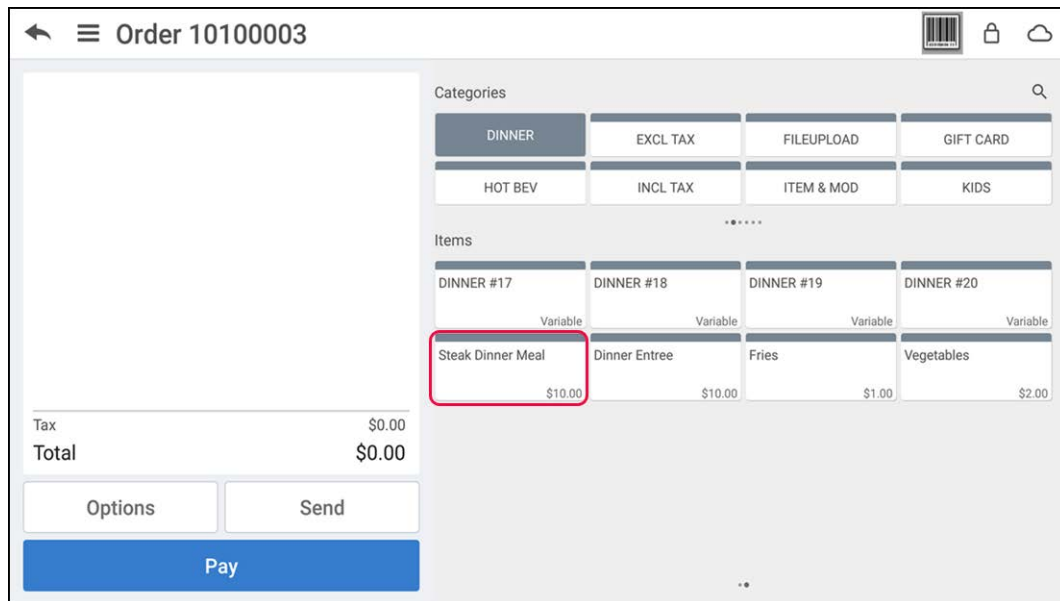


Figure 13 Selecting an item

3. Tap the **category** under which the Steak Dinner Meal menu item exists.  
-OR-  
Use the **Search** feature to locate the **Steak Dinner Meal**.
4. Tap the **Steak Dinner Meal** item to add it to the guest check. The Modify Item screen appears with the SIDES modifier items already added to the check. Any modifier item automatically added

to the check appears in blue in the selection screen to indicate they are already added; however, you can tap **Modify** to change the quantity of each, up to a maximum of three.

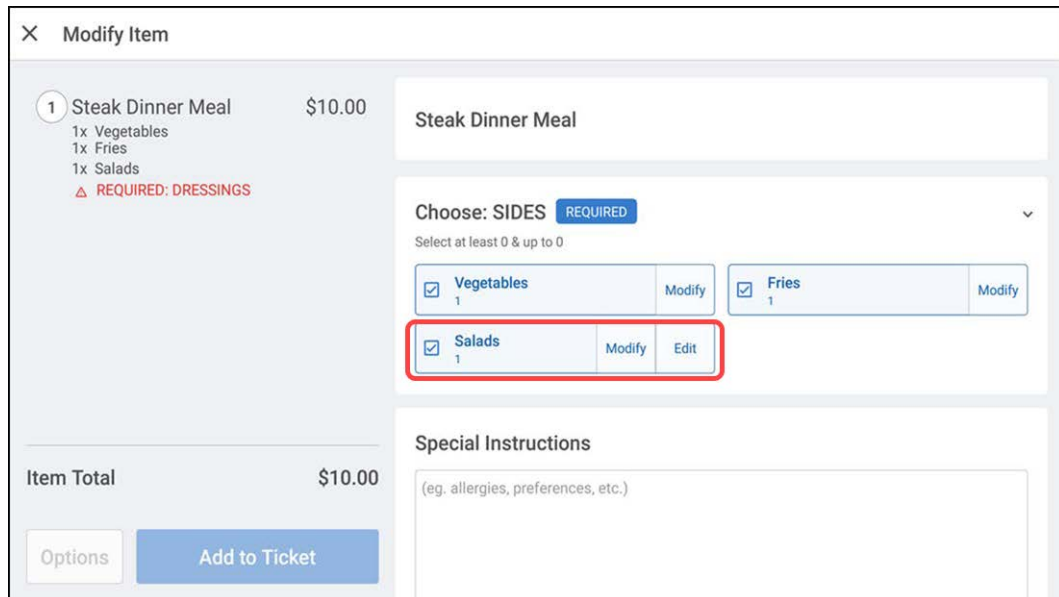


Figure 14 Adding First Level Modifier Selections

**Note**

The Edit button on a modifier selection indicates the modifier has second level modifiers you can apply to the item.

5. Tap **Edit** located on the **Salads** modifier in the Modify Item screen and the Dressings modifier group appears.

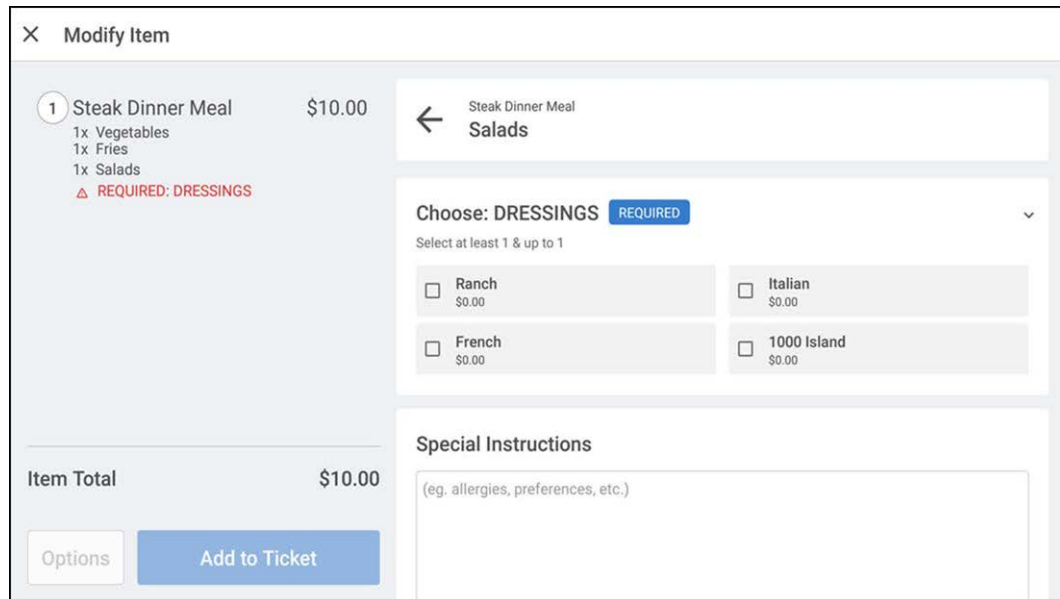


Figure 15 Adding Second-Level Modifiers

6. Tap a **dressing choice** and tap **Add to Ticket**. The nested modifier appears indented under the second level modifier on the check, for easy identification.

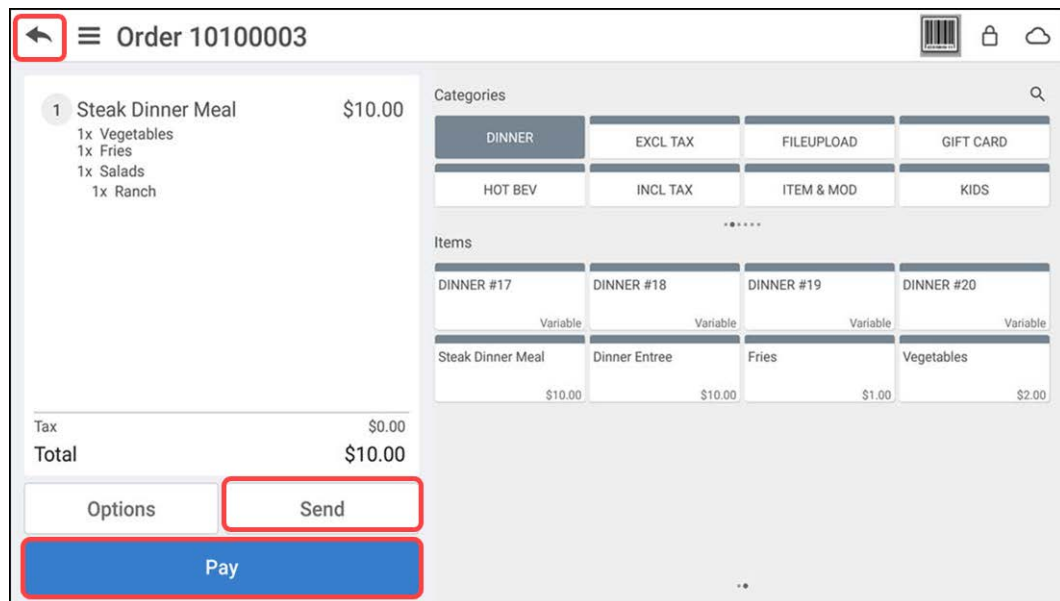


Figure 16 Order with Applied Modifiers

7. Tap **Send** to send the order to the kitchen.

8. To keep the check open for later payment, tap the **back arrow** in the top left corner, type a **name** for the order or accept the **system assigned order number**, and tap **Save Order**. When the guest is ready to pay, select the **check** from the open orders screen, tap **Pay**, and close the **check** as normal.

-OR-

To apply payment immediately, tap **Pay** and close the **check** as normal.

## Reporting Nested Modifiers

Based on item selection, sold modifiers, and list of modifiers in your inventory, you can view modifier details for the selected date range using the following reports. Click the link to view details about these reports:

- [Item Sales report](#)
- [Modifier Sales report](#)
- [Modifiers list report](#)

## Nested Modifiers, Feature Focus Guide

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