

Aloha Quick Service v19.11 Reference Guide

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Revision Record

Date	Version #	Description
10/13/2022	v19.6	Converted document to use new templates.
03/22/2023		Updated "About pricing" section in Maintenance Menu Overview to sync up with Manager Guide.
09/25/2023	v19.9	Added new field definitions for options introduced in Aloha POS v19.8 and v19.9.
07/16/2024		Updated document to reflect NCR Voyix branding.
01/15/2025	v19.11	Added new field definitions for options introduced in Aloha POS v19.11.

About this guide

The Aloha[®] Quick Service Reference Guide provides general information about each function on the Maintenance menu of the Quick Service Back-of-House application. This guide introduces you to the basic components of Quick Service and explains how each function works. The Quick Service Reference Guide also describes the options within each function, and how they impact your everyday use of Quick Service.

The Reference Guide also indicates how an option, or setting, relates to or depends on other options in the Aloha system. If an option has a dependency or relationship with another option, the following appears at the end of the definition, as applicable:

Required Options — Indicates the additional, **mandatory** settings you must complete in the Maintenance menu, for the current option to function properly.

Related Options — Indicates the additional, **elective** settings you can complete in the Maintenance menu, to enhance the functionality of the current option.

Related Requirements — Indicates the additional, **mandatory** steps or processes you must perform for the current option to function properly.

Is this guide for you?

The Quick Service Reference Guide is intended for both the novice and experienced users of Quick Service. A new user might read the overview information for any given function to gain an understanding of what the function is and how it is designed to operate. An experienced user that already has the basic knowledge to use Quick Service might access this reference guide to look up specific option descriptions, or to find out more about the various functions, screens, and options in Quick Service, to gain a higher return on their investment by understanding more of the features and capabilities of Quick Service.

The Quick Service Reference Guide also has a detailed index that includes every option you may need to locate, which makes it quick and easy for you to find the information you need.

This guide assumes you have the following knowledge:

- Basic understanding of restaurant terminology and concepts.
- Basic understanding of PCs and Microsoft[®] Windows[®].
- Understanding of the operation of a computer mouse and keyboard.
- Basic understanding of how to work with Microsoft Windows-based menu structures and basic application components, such as scroll bars, buttons, drop-down lists, text boxes, radio buttons, and check boxes.

How this guide is organized

This guide is designed to help you familiarize yourself quickly with Quick Service. It is organized as follows:

About CFC

This chapter introduces you to the key features and benefits of using Aloha Configuration Center and Aloha Manager to manage your data.

Getting started

This chapter provides an overview of the screen components and user interface and provides procedures for working with records.

Maintenance menu overview

This chapter provides overview for some of the more complex functions, such as labor, pricing, and taxes.

Maintenance menu field definitions

This chapter provides you with general information about each function on the Maintenance menu, as well as definitions for the options you may need to complete on the various Maintenance menu screens.

Aloha glossary

This chapter provides a list of terms specific to Quick Service with accompanying definitions.

Networking glossary

This chapter provides a list of technical terms specific to Table Service with accompanying definitions.

Field name index

Provides quick access to each option on the Maintenance screen, and is listed in alphabetical order.

General index

Conventions used in this guide

Numerous graphics and instructions appear throughout this guide. These conventions make it easy to find and understand information.

Symbols and alerts

The following graphic symbols alert you to important points throughout this guide.



Note

Highlights a special point of interest about the topic under discussion.



Reference

Directs you to a more complete discussion in another chapter of the current guide or other reference material.



Tip

Points to a useful hint that may save you time or trouble.



Caution

Alerts you that the operation being described can cause problems if you are not careful.

Text conventions

The following conventions help you recognize specific computer components and identify your interaction with the computer:

Example	Description
Click Save	Indicates buttons that require activation by a mouse, or by a function key on the keyboard.
Press Tab	Indicates keys you press on the keyboard.
Maintenance > Labor > Job Codes > Job Codes tab	Indicates the order to use for selecting menu items.
Ctrl+Tab	Indicates key commands. The plus sign indicates to hold down the first key and press the second key.
'Get Check'	Indicates the name of options and other screen elements.

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Introducing Aloha Configuration Center

Aloha Configuration Center is a centralized database management application that enables you to manage Aloha Point-of-Sale (POS) configuration settings for multi-store restaurant organizations, and offers remote access capability, through an easy-to-use .NET rich client interface.

Aloha Configuration Center combines the strengths of Aloha Manager and the Aloha Centralized Data Management (CDM) application, to form a new, more powerful, POS database management solution that eases the complexity of database management for your stores and helps lower the overall cost of ownership.

If you are a store owner, administrator, manager, or operator, and currently manage POS data for multiple stores, you know the task to configure and maintain a group of stores is complex. Through Aloha Configuration Center, you can quickly and efficiently manage your menus, pricing, and much more.

Use Aloha Configuration Center to create and maintain a single, centralized database for multiple stores more effectively and efficiently. POS data is stored within a SQL database, in a secure, centrally-located data center, which you can access any time over the Internet through an attractive, easy-to-use client-side application. No matter the type of device you use to connect, whether it's a workstation, home computer, or laptop, Aloha Configuration Center is 'always on' and always ready for your business needs.

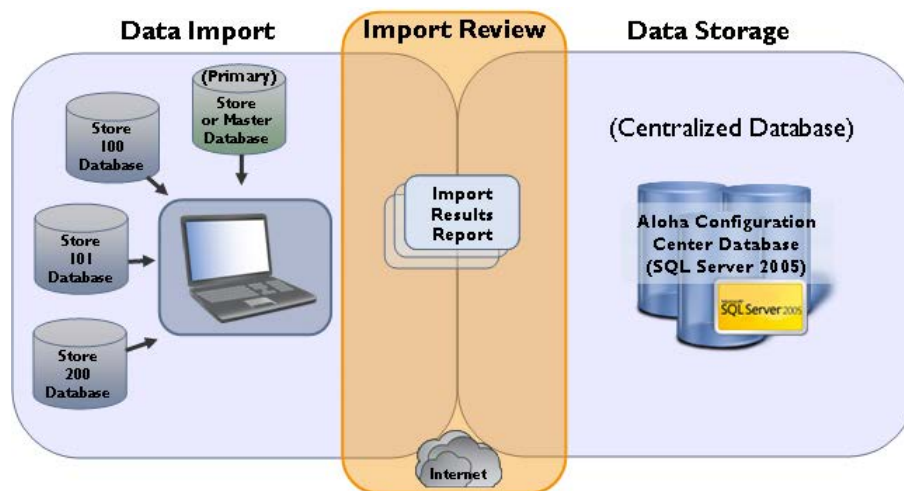


Figure 1 - 1 Aloha Configuration Center Overview

Even if you manage data for a large chain of restaurants, Aloha Configuration Center lets you reliably distribute POS data from a central location to multiple stores with minimal effort.

If there is one thing you can count on, it's that different stores within your chain may have different needs. Each individual store must cater to the needs and trends of its local market. Aloha Configuration Center enables you to create variations of your database records, to handle the ever-changing needs of each store. You can also schedule POS data changes for one or more stores,

from a single point of reference. Menu, price, promotion, and screen design changes are now easier than ever to maintain with Aloha Configuration Center.

And not only are POS data changes more manageable, data record security is now manageable on multiple levels. Aloha Configuration Center uses a multi-tier record ownership model that enables you to designate who can view or edit certain POS data.

If your organization owns multiple brand concepts, in addition to multiple stores, you too can enjoy the benefits of Aloha Configuration Center. You can effectively control multiple concepts, such as a coffeehouse, donut shop, and ice cream parlor, from a centralized source. And each store sees only the data applicable to their specific concept.

Another 'always easy' feature of Aloha Configuration Center is the user interface, which offers a new approach to data entry designed to increase data entry efficiency, increase clarity, and reduce the complexity of multi-store POS data management. The interface makes great use of its real estate and keeps information visible at all times. Aloha Configuration Center uses the latest interface design technology, to give you a rich mix of features and tools.

Corporate multi-store organizations, franchisees, existing Aloha customers, or brand new customers can all benefit from the flexibility and robust configuration capabilities of Aloha Configuration Center.

Key features

Aloha Configuration Center offers an extensive list of features to help promote a successfully managed multi-store operation:

Secure, hosted environment

The Aloha Configuration Center hosted solution includes a .NET architecture designed specifically for the Microsoft® platform and Windows®-based operating systems. This hosted solution offers a single point of administration at a data center backed by multi-redundant Internet and database access. You can access your Aloha Configuration Center database from any computer with the Aloha Configuration Center client-side application installed.

You receive a guaranteed service level agreement, including close to 24/7 uptime on data center core services, such as electrical power, Internet access, and bandwidth scalability.

With the Aloha Configuration Center hosted solution, there is no need to worry about network administration, data backup, and server software and hardware purchases and upgrades; instead, you receive an easy, and reliable IT solution, at a fraction of the cost.

Business continuity

For Aloha Configuration Center, Business Continuity is more than just disaster recovery, it is about continuous daily operations and the features and processes in place to keep critical data available, to reduce the issues associated with downtime.

Aloha Configuration Center allows you to recover your data set quickly, in the event you lose your BOH file server. It also enables you to distribute database changes for a future date, to intended stores. The changes remain in the local, store database until the specified effective date. This ensures database changes take effect on the POS as scheduled, even if the file server cannot connect to the host database. Moreover, if for any reason the store cannot connect to the host database, store employees can work in offline mode, and critical database changes, such as employee information and price changes, are updated on the POS in real-time mode. Then, when the connection is reestablished, Aloha Configuration Center synchronizes the hosted, centralized database with the store data.

Rich, easy-to-use interface

The Aloha Configuration Center user interface presents an intelligent, uniform, and easy-to-use client-side application. The client-side technology helps increase performance, and optimizes your access to the centralized database at the data center.

The Aloha Configuration Center screens are intuitively designed, for the 'novice' user; yet, still offer a rich set of advanced features and tools for the 'power' user. The new 'grid view' style of the function screens keeps your data visible when you add or edit records in the application.

Compatible with current Aloha Manager design

Aloha Configuration Center is designed to support the features and functionality of its predecessor, Aloha Manager. Current Aloha POS customers will not lose critical functionality when they switch to Aloha Configuration Center; instead, they can expect familiar features and functionality in the Aloha Configuration Center application.

For example, how you add a menu item to the database may be slightly different; but, the reasons and rules in regards to 'adding menu items' remain the same. This greatly reduces the time it takes to become proficient with the new Aloha Configuration Center application.

Multi-level database record management

Aloha Configuration Center enables you to manage database records at the store level, as well as at the corporate and franchisee levels, through the use of 'owners' and 'record hierarchy levels.' These two concepts offer enormous flexibility because they enable you to control who can view, update, and receive certain data, in a multi-store environment.

Data integrity

Corporate POS databases might have inaccurate and conflicting data, which can hamper the smooth distribution of POS data from the centralized database down to the stores. Menu items and other information can vary from store to store, which makes it difficult to know which item is accurate. Aloha Configuration Center keeps common product data consistent across multiple stores and provides instant updates, when necessary, to keep corporate and store data accurate and synchronized at all times, and allow for consistent reporting.

Real-time update capability

Aloha Configuration Center enables you to provide your stores with immediate database update capability. Stores can receive menu and other POS configuration changes from the data center and perform immediate updates to the Front-of-House (FOH) terminals, if necessary, before normal end-of-day processing.

You can perform certain restaurant operational tasks, such as adding a new employee to the system, and update the FOH terminals with the new information, without the need to bring down the FOH terminals.

Offline mode capability

Each time you log in to Aloha Configuration Center, the system attempts to connect with the hosted, centralized database. If a connection cannot be established, Aloha Configuration Center converts to 'offline' mode.

Offline mode enables you to perform the same functions as when connected to the host database; however, the changes you make while in offline mode are saved to the in-store database until Aloha

Configuration Center resumes a connection with the host. When a connection is reestablished, Aloha Configuration Center synchronizes the centralized database with the store data.

Smooth installation and migration process

Aloha Configuration Center works with your current store database(s), if you are an existing Aloha customer. We help you migrate your Aloha POS data to Aloha Configuration Center, to minimize downtime and disruption for your stores. You can quickly import your current Aloha Manager and CDM store data to Aloha Configuration Center, without the need to re-input all data. And the directory structure is similar to Aloha Manager; so, those well known directories, such as Aloha, Bin, Data, and Bmp, are also utilized in Aloha Configuration Center. This makes the move from Aloha Manager to Aloha Configuration Center a smooth and seamless transition.

Built-in security

Anytime you allow a company other than your own, to be responsible for hosting your data, the element of security becomes a focal point for your organization. You want to be sure that only authorized users can access your hosted database. You also want to make sure that once your data gets to each store; it is protected from employees that do not need access to all data. We anticipated the increased need for security; therefore, in addition to standard authentication and encryption support, we built multiple layers of security into Aloha Configuration Center, which focus on the access privileges of the application, as well as the view and edit capabilities of anyone that has access to data within the application.

- **Role-based user security** - Aloha Configuration Center uses security roles to grant different levels of system access to different types of employees within the application. An employee record has an assigned security role, which has specific access rights associated, based on the job role of the employee. The security roles associated with an employee determine who has access to the different functions and options within Aloha Configuration Center, and are the foundation of our role-based security platform.

Your employee record is linked to your Aloha Configuration Center user ID and password. Each time you log in, Aloha Configuration Center verifies you as a valid user and grants access rights to only those areas you are allowed to use, based on the security role assigned.

- **Record-level security** - Aloha Configuration Center enables you to control who can view and edit data in Aloha Configuration Center, based on the owner assigned to each record in the system. Each owner has an associated 'record hierarchy level,' which establishes at what level each database record resides within the record hierarchy.

Additional Aloha Configuration Center features

Along with the list of key features previously discussed, Aloha Configuration Center also boasts the following notable features:

- POS data change distribution reporting by store.
- Support for multiple POS versions across stores.
- Easy deployment of initial installation and updates.
- Licensing control and enforcement at the hosted data center.
- Upgrade assistance to transfer existing CDM or standalone data into Aloha Configuration Center.
- Backup and disaster recovery support.

Benefits

Aloha Configuration Center enables you to see value in your investment, from the first day. You benefit greatly from this product because Aloha Configuration Center enables you to:

- Access your database from anywhere with Internet access and a client-side application.
- Control access to data based on security roles and permissions.
- Distribute database updates to a group of stores or individual stores.
- Update data in a real-time environment.
- Ensure data integrity.
- Eliminate duplicate data entry.
- Improve menu and menu-pricing accuracy.
- Implement promotions and pricing strategies effectively.
- Manage unique database configurations across multiple sites.
- Improve compliance with government laws and regulations.
- Increase up-time.
- Improve supportability.
- Support international requirements and provide easy localization.
- Integrate closely with related corporate systems.

How Aloha Configuration Center works

After the initial POS data is imported and distributed to each store within a multi-store restaurant organization, the corporate office can easily manage daily POS data changes using the hosted, centralized database. The corporate office accesses the client-side application to add or update menu items, prices, promotions, and more. The POS database changes are saved in the centralized database, and then distributed to stores using the Data Distribution and Export processes. After End-of-Day processes at a store, or when a store performs a Refresh or Update, the POS system at the store receives the database updates and makes them available on the FOH terminals.

The following diagram illustrates how Aloha Configuration Center database changes are updated and distributed to each store.

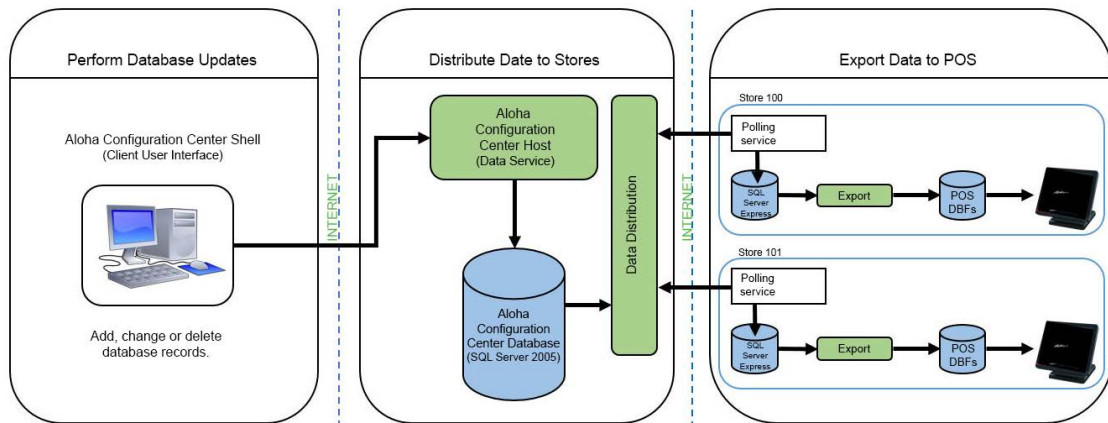


Figure 1 - 2 How Aloha Configuration Center Works

Data distribution

The POS database administrator accesses the Aloha Configuration Center client-side application to add, modify, or delete menu items and other POS configuration settings in the Aloha Configuration Center database. When the administrator saves changes to the database, the changes are saved immediately to the hosted, centralized database.

At regular intervals, a service installed on the in-store file server at each store, polls the centralized database for new database updates. If updates are available, the database changes are transmitted to each store's local database, where they are kept until the store performs one of the following tasks:

- The store manually runs the 'Refresh' utility, which brings down the FOH, pulls the current day changes from the local database, and updates the POS with the new changes.
- The store manually runs the "Update" utility, which brings down the FOH, pulls the next business day changes from the local database, and updates the POS with the new changes.
- The store performs an "End-of-Day" process (manually or automatically), which in addition to other important end-of-day tasks, brings down the FOH, pulls the next business day changes from the local database, and updates the POS with the new changes.

Export

When a store is ready to update their FOH terminals with the most current data, usually through an automated End-of-Day process, or a manual Refresh, an export service runs on the in-store file server, to generate a new set of POS database files. These files include any database changes, as well as any database records that are valid for the current business day, based on an associated event or activation schedule that became active. The new POS database files are stored in a temporary directory, then copied to the \NewData subdirectory.

The system brings down the FOH terminals, forces an update of database and configuration files from the \NewData subdirectory to the \Data subdirectory, and restarts the FOH terminals. Any new, active records are now available on the FOH terminals at the store.

If the store performs an Update, any database records that are valid for the next business day, are also stored in the temporary directory.



Note

If a store loses data connectivity for several days, the export process still functions successfully because the data distribution process sends all applicable data to the store-level database, including data that is scheduled to be active for a future date.

Requirements

We strongly recommend you adhere to the minimum system requirements to successfully operate Quick Service in your business.



Caution

The needs of your business may require you to obtain more than the minimum system requirements. Please contact your NCR Voyix representative to determine the specific requirements for your establishment.



Reference

Refer to [Aloha Solution Requirements Guide - RKS1626](#).

Aloha Configuration Center key concepts

To understand how Aloha Configuration Center can work for your organization, it's important to understand how Aloha Configuration Center works. This section discusses the following basic concepts:

Multi-store environment

As the food service marketplace becomes increasingly competitive, multi-unit restaurant chains are working aggressively to operate more profitably, more productively, with lower operating costs.

Configuration Center enables you to successfully control and manage data across a multi-unit enterprise environment, to increase enterprise data management efficiency and ease-of-use, while decreasing overall cost of ownership.

The primary purpose for Configuration Center is to maintain data, such as restaurant menu items, prices, and taxes, in a single, centralized database, for distribution to multiple stores.

The Configuration Center database is stored on a hosted server, at a secure data center location. You have the flexibility to access your data from virtually any location, and from multiple types of devices.

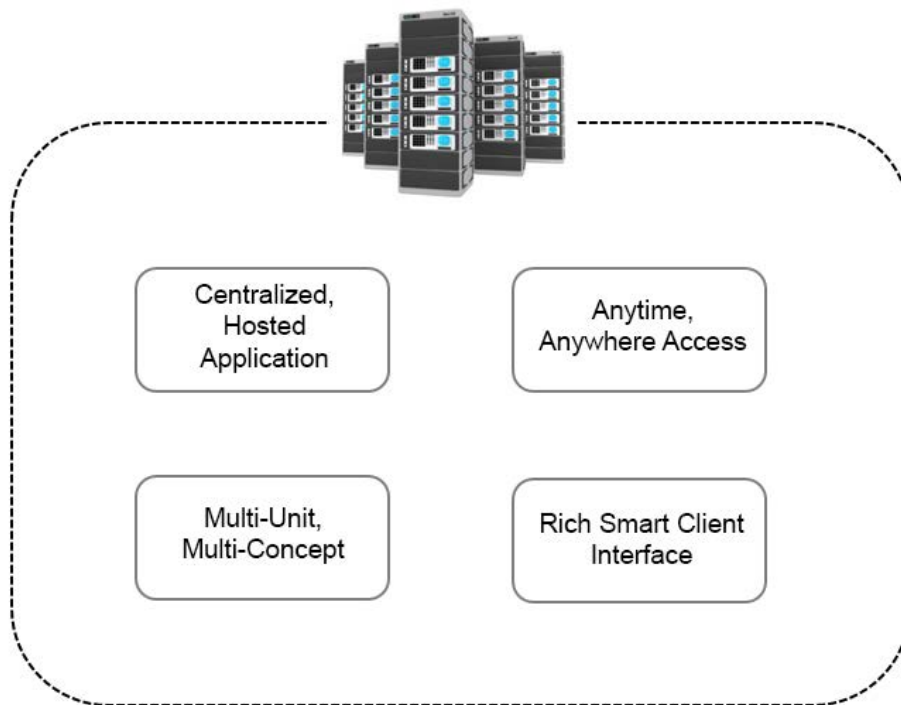


Figure 1 - 3 Data Center Benefits

Since multiple employees can access the Configuration Center database at the same time, the system effectively manages concurrency situations when working with a shared database at the same time.

For example, if employee A and employee B access a record at the same time, and employee A saves their record first, employee B receives a warning message when they attempt to save. The message indicates employee B needs to log out and log back in before making their changes to the record. This is because the instance of the record they are working with is no longer current. System concurrency, which supports record modifications and deletions, keeps data integrity high, while controlling simultaneous updates to the system.

Configuration Center also easily handles database updates to multiple stores. Each time you add a new menu item or make a configuration change to the database, you can keep the data synchronized with your stores, through immediate or scheduled updates.

Each store retrieves its database changes from the data center through a polling process, and updates the Aloha Front-of-House (FOH) terminals at the store with new data, when a system refresh (update) or end-of-day process occurs.

In addition to distributing centralized database information to multiple stores, you also use Configuration Center to build and activate the POS order entry screens that appear on the FOH terminal or self-service kiosk in a store. These order entry screens are also managed in the centralized database, and distributed to stores, as necessary.

Record ownership and hierarchy

Before you begin to use Aloha Configuration Center, determine how your organization plans to control database records for your multi-store environment.

For some companies, the corporate office controls the database records for all stores within their company. Within other organizations, the corporate office controls the records for the stores they own, while allowing each franchisee to have control of certain records, as necessary. Additionally, there are various database records that individual stores need to control for their operation.

No matter how you want to control database records within your organization, Aloha Configuration Center enables you to create a hierarchy structure to successfully manage database records for your multi-store environment. To do this, Aloha Configuration Center employs two concepts known as 'Owners' and 'Record Hierarchy Levels.'

Owners

Aloha Configuration Center requires you to assign an 'owner' to each database record you add to the system. An owner is a restaurant organization, franchisee, or individual store that controls one or more records in your Configuration Center database. When you assign an owner to a database record, you are designating who has control of that record.

Owners are created when your database is set up, and each owner has an inherent 'record hierarchy level.' The record hierarchy level attached to the owner becomes attached to the database record, as well. And it is the record hierarchy level associated with both the owner and record, that ultimately determines who can view and edit a database record.

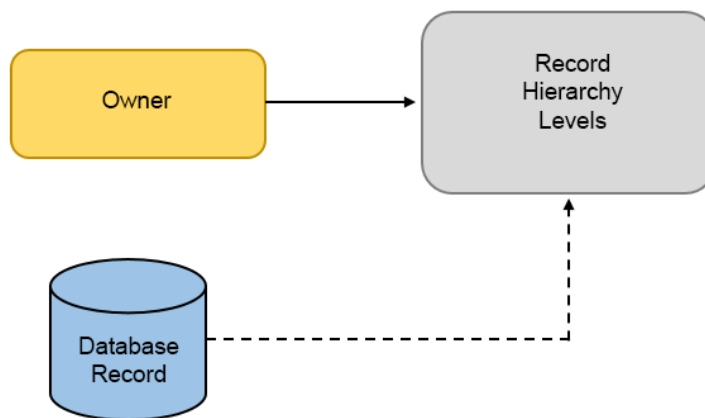


Figure 1 - 4 A Database Record Inherits the Record Hierarchy Level of its Owner

The owner assigned to a database record also determines how the database record is filtered, when data is distributed to stores. This provides control over where data ends up during the data distribution process, for a multi-store, multi-owner organization.

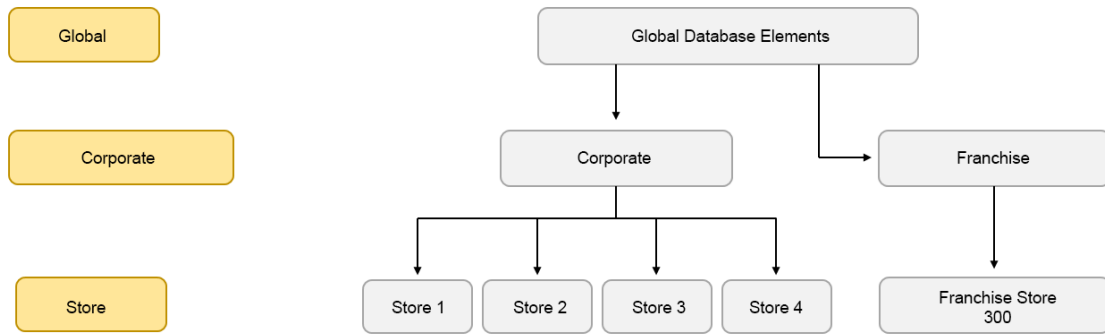


Figure 1 - 5 Example of an Organization with Multiple Owners

Moreover, the owner affects security of database records. When you add an employee to the system, you must assign an owner to the employee. The owner you assign to the employee determines the data they can see when they log in to Configuration Center. The owner assigned to the employee also determines the choice of owners they can assign to any new records they create; thereby, establishing the appropriate record hierarchy level for each record.

Tip

The security roles defined for an employee also play a factor in determining the data an employee can view or edit when they access Configuration Center.

The following matrix indicates the 'view' and 'edit' privileges for a database record, based on the owner assigned to the employee accessing the record, as well as the owner assigned to the database record:

	Global-Level Employee	Corporate-Level Employee	Store-Level Employee
Global-Level DatabaseRecord	View/Edit	View	View
Corporate-Level Database Record	View/Edit	View/Edit	View
Store-Level Database Record	View/Edit	View/Edit	View/Edit

Figure 1 - 6 View and Edit Privileges Based on Employee and Record Ownership

Assigning an owner to each database record also makes data easier to manage because you eliminate the need to create duplicate records for each store; thereby, consolidating the number of records you have to maintain. You have a more robust reporting structure when you assign owners to database records because you can filter and organize your sales, product, and labor data more efficiently.

Record hierarchy levels: Global, Corporate, and Store

As mentioned earlier, an owner has an associated record hierarchy level. There are three record hierarchy levels built in to Configuration Center: Global, Corporate, and Store. The fundamental purpose of these levels is to control:

Record visibility — Restricts employees from viewing records they are not entitled to see.

Record maintainability — Controls who has the ability to edit records in the Configuration Center database.

Record distribution — Filters the database records that are sent to each store, based on who owns the records.

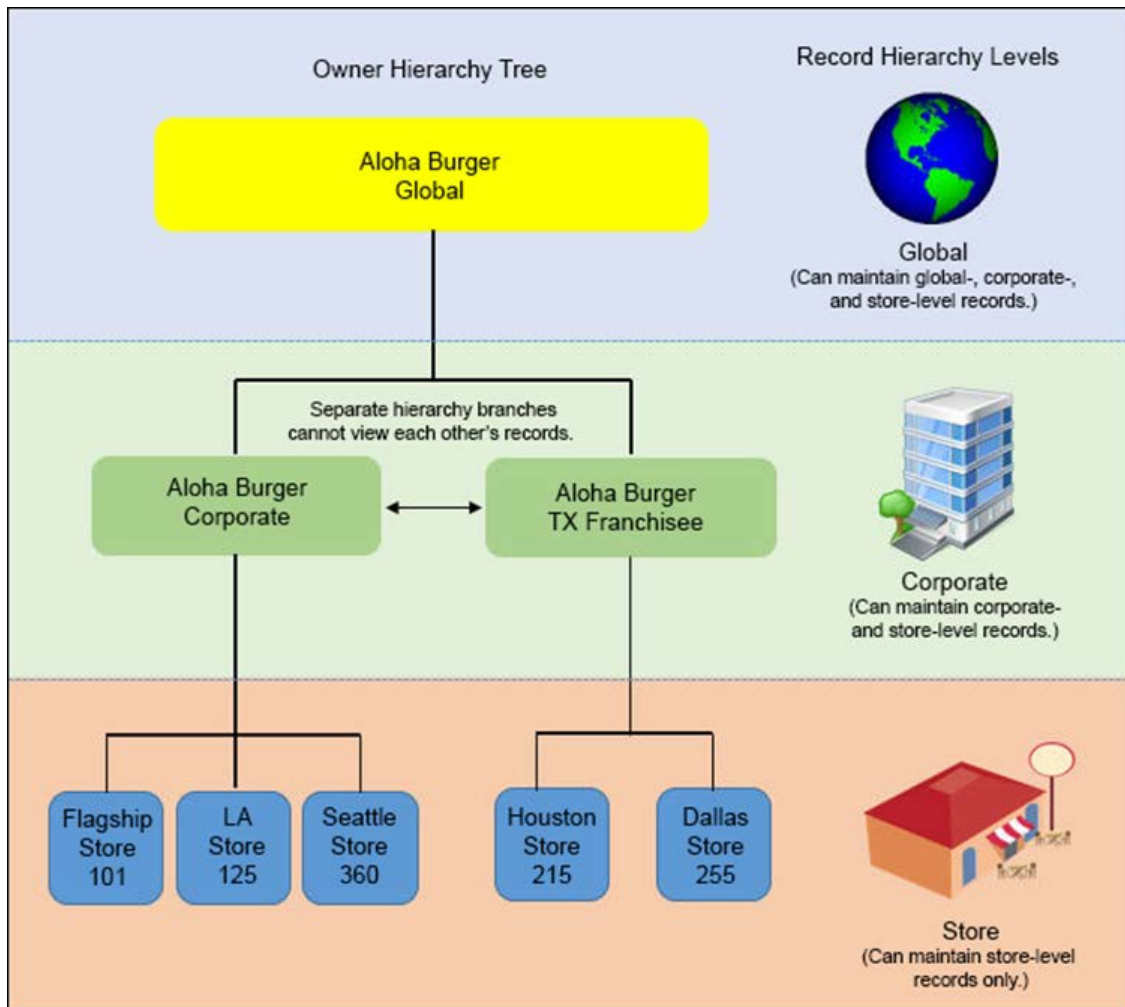


Figure 1 - 7 Example Owner and Record Hierarchy Tree

Global is the highest, and most powerful, record hierarchy level. A database record with a global-level owner is visible to all levels of employees within the hierarchy for that database record. For example, AlohaBurger Global, which appears at the top level in the above figure, is a global-level owner. Records that belong to AlohaBurger Global are visible to AlohaBurger Corporate, AlohaBurger TX, and all stores under them. Records owned at the global level are editable only by a global-level employee, who is within the same record hierarchy.

Corporate is the next highest record hierarchy level. A database record with a corporate-level owner is visible to all levels of employees within the hierarchy for that database record. For example, Aloha-Burger Corporate, which appears at the middle level in the above figure, is a corporate-level owner. Records that belong to AlohaBurger Corporate are visible to AlohaBurger Global, as well as

stores 101, 125, and 360. Records owned at this level are editable only by a corporate- or global-level employee, who is within the same record hierarchy.

Notice that in the above figure, AlohaBurger TX appears at the same record hierarchy level as Aloha-Burger Corporate. Depending on your organization, you might have multiple owners at the corporate level, but records that belong to one owner are not visible to other owners at the same level. For example, records owned by AlohaBurger Corporate are not visible to AlohaBurger TX. This is because although the owners are at the same hierarchy level, their records fall under separate hierarchy branches, as shown in the above figure.

Store is the lowest, and most restrictive record hierarchy level. Although most Configuration Center functions allow you to assign different owners to records, some system records, such as employee and hardware records, need to be assigned to a specific store. This is because the information contained in these types of records are applicable to a specific store only; therefore, the store needs to own, or control, the record.

A database record with a store-level owner is visible to all levels of employees within the hierarchy for that database record. For example, store 101, which appears at the bottom level in the above figure, is a store-level owner. Records that belong to store 101 are visible to AlohaBurger Corporate, as well as AlohaBurger Global; however, any records owned by store 101 are not visible to other stores at the same level, such as store 360 and store 255. Records owned by store 101 are editable only by a store 101 employee, or a corporate- or global-level employee, who is within the same record hierarchy.

Store group hierarchies

If your organization owns a large number of restaurants, it might be common practice to organize your restaurants by certain classifications, such as by size or location, for sales reporting or regulatory purposes.

Those same classifications can also be very useful when you want to better manage the menu items, promotions, tax rates, and other POS database records that are available for use at only certain restaurants.

Configuration Center provides a store group hierarchy feature that enables you to define several hierarchies, or classifications, by which you can group your stores.

A hierarchy is any classification you find helpful when organizing your stores, such as region, tax jurisdiction, store size, or pricing tier, to name a few. You can use as many hierarchies as you need, to place your stores into logical groupings.

For each hierarchy you define, you can create several store groups to assign to the hierarchy. For example, for a tax jurisdiction hierarchy, you could create a store group for each state, to organize tax jurisdictions for your restaurants, by state.

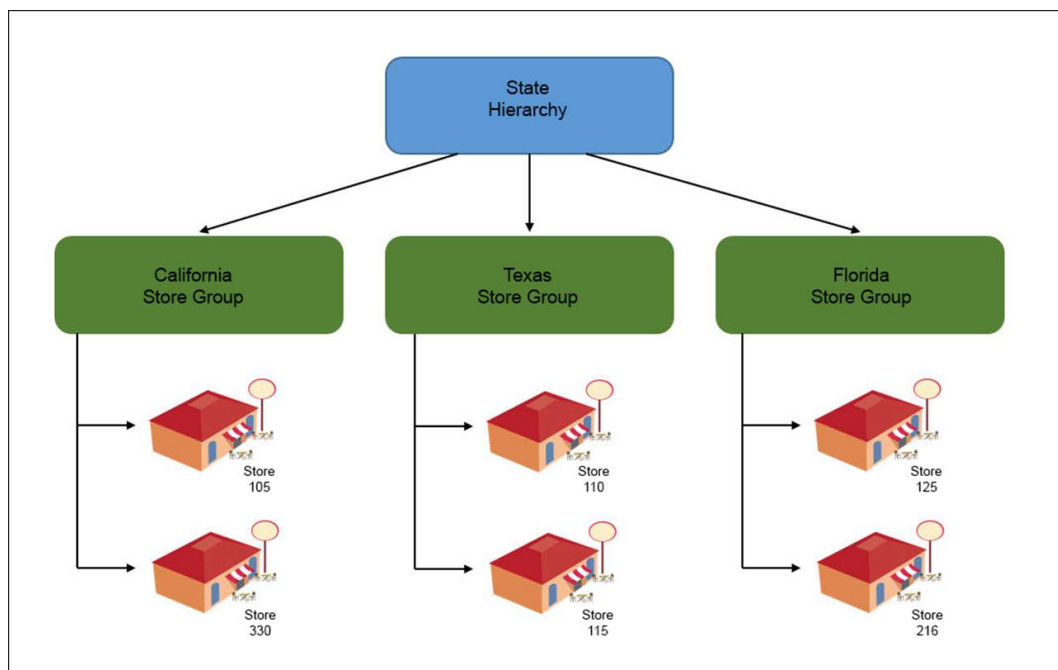


Figure 1 - 8 Example of a Store Group Hierarchy by Region

After you set up store groups for a specific hierarchy, you assign each applicable store to the appropriate store group. You can assign a store to only one store group, within a given hierarchy.

 **Tip**

It is important to carefully plan your hierarchy structure before adding it to the system, as once you add a hierarchy and store group, you cannot delete them from the system.

Store group hierarchies and the versioning process

After you set up your hierarchies and store groups, and then assign your stores to the applicable store groups, you can then use those store groups to assign a different version of a POS database record to multiple stores.

A 'version' is a copy of a record, which has the same record number as the original, primary record; however, there might be one or more settings that are different, such as a tax rate, and is applicable to only specific stores. Record versions allow you to have different settings in a primary record at a store, without creating a separate, unique record for each store.

Part of the process to create a version of a primary record includes assigning the version to one or more stores. If the version is applicable at one store only, you simply assign the version to the exact store; however, when a version is applicable to multiple stores, you select the specific hierarchy under which your desired store group resides, and then assign the version to the desired store group.

For example, you might have a 'States' hierarchy set up, to organize your restaurants by states, and a 'Region' hierarchy set up, to organize your restaurants by territory. If you need to create a version of a promotion record because the promotion has a different price for stores in Florida, you could assign the version to the Florida store group that resides under the 'States' hierarchy.

But what if the promotion price is good for stores in the entire Southeast region? You could assign the version to the Southeast store group that resides under the 'Region' hierarchy. As a result, the versioned promotion record would be available at all stores assigned to the Southeast store group.

As you can see from the previous example, if you take time to set up a variety of hierarchies and store group combinations, you will have a host of possibilities available, when assigning a version to multiple stores, at one time.

Store group hierarchies and the version consolidation process

When you set up Configuration Center initially for your multi-store environment, and import data from each of your stores into the hosted, Configuration Center database, there is a chance some records at the store level will not have the exact same settings as the corporate-owned record. When the system encounters records such as these, the conflicting store record is converted into a version of the primary, corporate-owned record, and automatically assigned to the imported store.

If there are a lot of variances between corporate-owned data and the data imported as store data, a large number of individual record versions could arise, as a result of the store import process. When

this happens, the hierarchies and store groups set up in the system become a valuable tool to consolidate those individual store versions into a single, store group version, for easier maintenance.

After you import your stores, if you have a primary record with many different store versions, you can consolidate those versions into one version, and then assign the version to a specific store group. That single version will be available to each store included in the selected store group, which is much easier to control than having to manage a different version for each store.

For example, you might have several store versions of a hamburger menu item because some stores that were imported had a different name, price, or modifier setting for the same hamburger menu item record, which failed to match the corporate-owned hamburger menu item record.

After reviewing the individual store versions, you determine there does need to be a version of the corporate-owned hamburger record because your California stores require a different price. You can locate one of the store versions that has the desired price, and then consolidate that version, and assign it to the 'States' hierarchy. When you select the hierarchy, the system determines the appropriate store group to assign, based on the store assignment of the version. The store group to which the store belongs, which in this example is California, becomes the store group assignment for the consolidated version. When you consolidate the first version, the system automatically deletes any other version of the hamburger record, whose store assignment is also part of the California store group. The new, consolidated version replaces the individual versions, at each of your California restaurants. The system will not consolidate any store version whose store assignment is not part of the California store group.

You can consolidate versions and assign them to store groups at any time; after you import a few stores, or after you import all your stores. And you can also consolidate manually created versions, when necessary.

The hierarchy and store group structure required for version consolidation must already exist in Configuration Center, before you can start to combine versions.

Record versioning

Many multi-store restaurant organizations allow their stores to have POS database variations. Different stores might use different tax rates, sell items at different prices, or offer different promotions for a given period. Configuration Center uses a concept called 'Versioning' to accommodate multi-store businesses with these types of varying needs.

When you set up an Configuration Center database, you generally start with a set of corporate-owned records that are applicable to the majority of your stores. These initial records are considered your 'primary' records. Versioning allows you to have variances in a primary record, without the need to create a separate, unique record for each store.

A version of a primary record is beneficial when a store requires certain settings in the record to be different. A version is essentially a composite copy of the primary record, except for the few changes made to the record that one or more stores may need. The version is not a standalone record, it shares the record number of the primary record, but overrides the primary record at designated stores.

Versioning methods: Standard vs. Scheduled

Depending on the type of database record you version, you will either use the Standard or Scheduled versioning method.

Standard versioning is the versioning method used for the majority of Maintenance function records. Standard versioning enables you to create a version of a primary record, and then assign the version to an individual store, or group of stores. When data is sent to each store during the data distribution process, the system filters the data so that only those stores to which the version is assigned actually receive the version of the primary record.

The version overrides its primary record indefinitely, as there are no start and end dates used with Standard versioning. If you no longer want a version available at a store, you delete the version, and the primary record will be in effect at the store. Additionally, when you use standard versioning, a store can have only one version of a specific primary record active at any given time.

Versions with start and end dates use Scheduled versioning, which is available for the following Maintenance functions only:

Event Schedules | Modifier Groups | Panel Editor | Price Changes | Promos | Tax Groups | Tax Types

You cannot create versions for records in the following Maintenance functions:

Activation Schedules | Cash Cards | Cash Drawers | Clock-In Messages | Comp Code | Comp Employee | Corporate Administration | Display Boards | Drink Dispensers | Employees | Global Administration | Hierarchies | House Accounts | Labels | Media Files | Movies | Printers | Scales | Server Messages | Store | Terminals | Video Controllers | Video Queues | Volume Levels

The following example describes how standard versioning works for a corporate database with multiple stores:

You initially decide all your stores will start lunch at 11:00 a.m. You create a Lunch Day Part record, which indicates the start time of a specific meal period for a store. When you save the record to the hosted Configuration Center database, all stores under corporate receive the 11:00 am Lunch Day Part record.

After a few months, Store 300 decides they need lunch to begin at 10:30 a.m., as they have many customers in the area that take earlier lunches. To accommodate Store 300's request to start lunch earlier, you create a version of the primary Lunch Day Part record, and assign the version to Store 300.

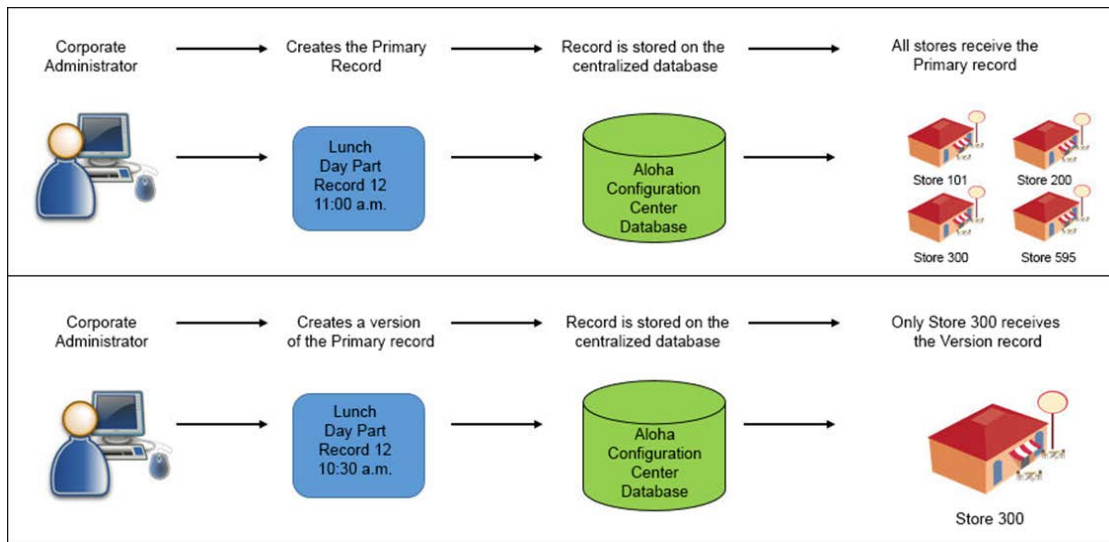


Figure 1 - 9 Example of Primary and Versioned Day Part Record

Notice in the above graphic, the version carries the same record number as the primary record. When Store 300 receives their data files for the current business day, the version of the primary Lunch Day Part record is included in those files, and overrides the primary record from that point forward. As a result, the Lunch Day Part record for Store 300 is now set to 10:30 a.m., instead of 11:00 a.m.

Scheduled versioning works similar to standard versioning, except that scheduled versioning provides the ability to set start and end dates to indicate when a version is active at a store.

For example, let's say your primary food tax record contains a 7.25% tax rate, and you want to assign a food tax rate of 8.25% to Store 105, from January 1, 2008 through May 31, 2008. You can create a version of the primary record ahead of time and change the rate to 8.25 percent. Set a start date of January 1, 2008, an end date of May 31, 2008, and then assign the version to Store 105.

When the version becomes active at Store 105 on January 1, 2008, a tax rate of 8.25% will be applied to food items sold at Store 105. After End-of-Day processes on May 31, 2008, Store 105 will revert back to using the primary food tax record, unless you have another version scheduled to become active on June 1, 2008. For example, you might create another version, change the rate to 8.75%, and then schedule it to become active June 1, 2008. When you use scheduled versioning, a

store can have multiple versions of a primary record, as long as versions with the same version assignment (i.e., Store 105) have unique start dates.

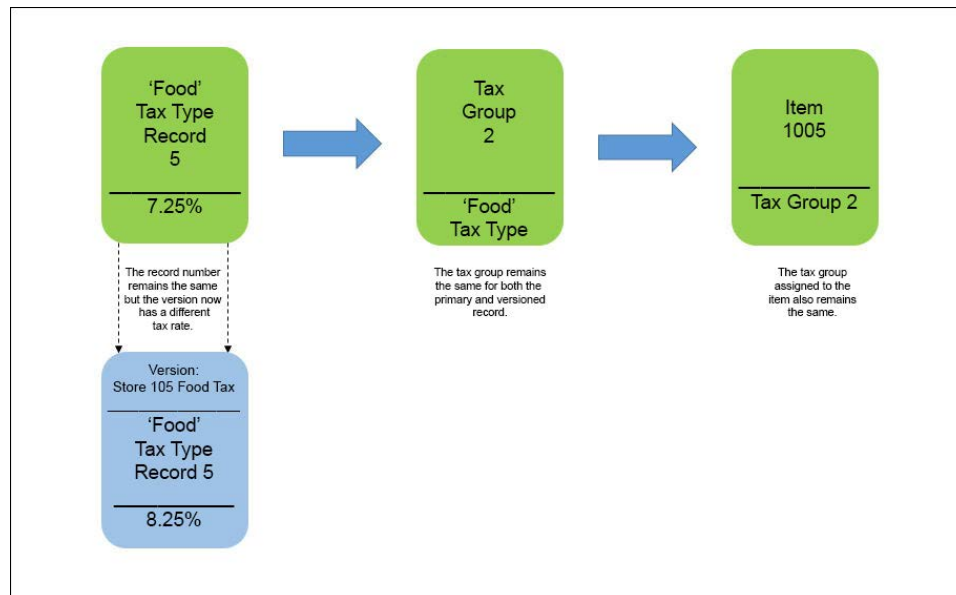


Figure 1 - 10 Version of a Primary Food Tax Record

Consolidating versions

You can create a record version manually, for most of the Maintenance functions in Configuration Center. Record versions are created automatically when you import a store and the system detects a variance between a corporate-owned record and its matching store-owned record. For example, if your corporate-owned hamburger item record has a different price than the hamburger item record you import from Store 105, Configuration Center automatically creates a version of the primary hamburger record upon import, and assigns the version to Store 105.

If you have several stores to import, you could end up with quite a few store-level versions, which might be difficult to manage. Configuration Center uses a feature called 'Version Consolidation' to effectively handle multiple store versions of a primary record.

Version consolidation essentially converts individual store versions into a single, store group version, for easier maintenance.

Before (or even after) you import all your stores, you have the ability to set up hierarchies, or classifications, in Configuration Center, to organize your stores into categories, such as by Region, Tax Jurisdiction, and more. You can create one or more store groups for each of those regions, and then assign your stores to the applicable store group.

After you import your stores, if you have a primary record with many different store versions, you can locate one of the more representative store versions, and then consolidate that version and assign it to a specific hierarchy. When you select a hierarchy, the system determines the appropriate store group to assign, based on the store assignment of the version. The store group to which the store belongs,

becomes the store group assignment for the consolidated version. When you consolidate the first version, the system automatically deletes any other version of the same primary record whose store is also part of the designated store group. The new, consolidated version replaces the individual versions, for each store in the store group. The system will not consolidate any store version whose store assignment is not part of the selected store group.

Version priority

You might have a large number of versions set up in Configuration Center to manage store variations; therefore, it is important to understand how the POS system determines which versions are in effect at a store at any given time.

Configuration Center uses a priority rule, in combination with start and end dates, to determine which version is in effect at a store. The more specific the version assignment, the higher the priority of the version.

1. Store (highest priority)
2. Store Group
3. Corporate
4. Global (lowest priority)

For example, if there is a store version and store group version of a food tax record in the system, and Store 105 is affected by each version, the version assigned specifically to Store 105 has the highest priority. The version assigned to a store group that includes Store 105 has the next highest priority, and so on. This priority rule is in effect for each version that is active.

In situations where there are multiple versions at the same level, for example, if two tax record versions are assigned specifically to Store 105, then the system uses the rate with the most recent 'start' date to determine which version is in effect at the store.

Record ownership promotion

When a restaurant organization comes up with a new menu item to test market, it's common to sell the item at a single store or a group of designated stores, for a limited time. If the menu item is a success, the next step might be to sell the item at all store locations. To support this business need, Configuration Center enables you to promote, or advance the ownership of a record from its current owner to a higher-level owner.

For example, AlohaBurger decides to sell a new 'quesadilla burger' at store 101, their flagship store. When they add the burger item to the centralized database, they assign store 101 as the owner. After three months, AlohaBurger decides to sell the new menu item at all their stores. The corporate database administrator for AlohaBurger accesses the 'quesadilla burger' menu item and promotes the item to corporate ownership. The burger will be available at each corporate-owned store, the next time data distribution runs at each store. Note: For this example, in addition to promoting the item to corporate, you need to ensure the order entry item is added to a corporate panel in Maintenance > Screen Designer > Quick Service Screen Designer > Working with Panels.

When promoting an item, remember the following guidelines:

- You can promote only one record at a time.
- You can promote a record from store to corporate owner, or from corporate to global owner only.
- When you promote a record, the system will log you out and return to the Login screen.
- You cannot promote a record if the promoted record number conflicts with another record. For example, if you have multiple corporate owners in the database with their own set of record numbers, and you promote a corporate-owned record to global ownership, the global record cannot conflict with any other corporate-level record numbers.

You cannot promote a record if it is referenced in another record, with a lower ownership level. For example, if the item you want to promote to global ownership has tax group assigned, with corporate ownership, the system will not allow you to promote the record.

Multiple POS version compatibility

Configuration Center supports organizations with different versions of Aloha POS installed at their stores. Because different versions of the Aloha POS offer different options and features, when an employee accesses a maintenance function in Configuration Center to add or modify a record, the system checks the ownership of the record, and then referencing the specific POS version for the owner, determines the options and controls that need to appear on the user interface for that record. This allows Configuration Center to manage records for multiple versions of the POS, all from the same function screen.

Record options

A record option is a parameter setting you define for a record. A record option could be anything from an entry field on the screen, to a list of devices to choose from in a drop-down list. Different record options are available based on the owner assigned to the employee that logs in to Configuration Center.

For example, AlohaBurger has three stores imported in the centralized database: store 101, 105, and 215. Each store uses a different Aloha POS version, v6.1, v6.2, and v6.4, respectively.

When a store employee accesses Configuration Center, they see record options that correspond to their POS version only. If the manager at store 101 accesses a record, they see the record options applicable to POS v6.1 only. The manager at store 105 sees the record options applicable to v6.2, and the manager at store 215 sees the record options applicable to v6.4.

When a corporate employee accesses a record in Configuration Center, they see all record options that correspond to the POS versions installed at their imported stores. When the corporate database administrator for AlohaBurger accesses Configuration Center, all record options up to Aloha POS v6.4 are visible. And any option introduced later than v6.1 has a version indicator next to the option name (e.g., [v6.2]).

The following example illustrates record options for different versions of the POS, all on one screen.

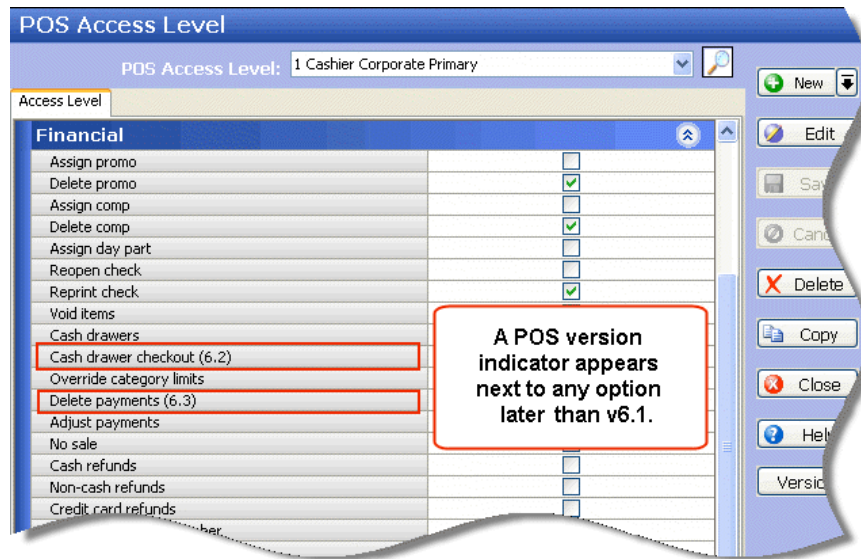


Figure 1 - 11 Configuration Center Record for Multiple POS Versions

When a global employee with multiple corporate owners logs in to Configuration Center, they will see different record options based on the owner of the record they select. For example, one of the corporate owners for AlohaBurger has a store on POS v6.4. Another corporate owner for AlohaBurger does not have any stores on POS v6.4. When the global employee selects a record belonging to the owner with a store on v6.4, they will see the v6.4 options; however, when the global employee selects a record belonging to an owner without a store on v6.4, they will not see any v6.4 options. Instead, they will see only those options introduced prior to POS v6.4. However, if the global employee decides to create a new global-owned record, they will see both the options for POS v6.4, as well as the options from earlier versions of the POS, all on the same function screen.

When all imported stores are using the same version of Aloha POS, version indicators no longer appear next to an option. Additionally, if an option becomes obsolete in a later version of the POS, the option is no longer visible on the user interface, once there are no more stores using the earlier version of the POS.

User interface controls

User interface controls consist of the elements on an Configuration Center screen, such as check boxes, drop-down lists, radio buttons, and more.

When either a corporate or store employee accesses a record in Configuration Center, they see the user interface controls that correspond to the latest POS version installed at their imported stores. For example, AlohaBurger has two stores imported in the centralized database: store 101 and 105. Each store uses a different Aloha POS version, v6.1 and v6.2, respectively.

Aloha POS v6.1 has a record option that uses a check box, but POS v6.2 uses a drop-down list for the same record option. In this situation, the user interface control appears as a drop-down list for all employees, regardless of the POS version installed at each store.

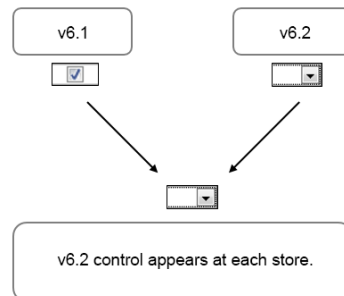


Figure 1 - 12 User Interface Controls

In cases where a text box control for Aloha POS v6.2 or later allows more characters in a text box, the characters are truncated at stores with POS v6.1 installed. For example, if POS v6.1 allowed up to 20 characters, but POS v6.2 allows up to 30 characters, an employee at a store with POS v6.1 installed, sees only the first 20 characters when they access the text box.

Maintenance functions

In addition to displaying Quick Service options and user interface controls based on Aloha POS versions, the system also determines the Maintenance functions that need to appear.

If a Maintenance menu function was introduced in a POS version that is later than what is currently installed at a store, the function does not appear in the menu. For organizations with multiple versions of the POS installed at various stores, all Maintenance functions introduced since the latest POS version will appear at each store, regardless of the POS version installed at the store. And for any Maintenance function later than v6.1, a POS version indicator appears next to the function name.

For example, the three stores discussed in the Record Options section have POS v6.1, v6.2, and v6.3 installed. The Modifier Codes function, which was introduced in v6.2 will appear in the Maintenance menu at all three stores, and a POS version indicator of 'v6.2' appears next to the function name.

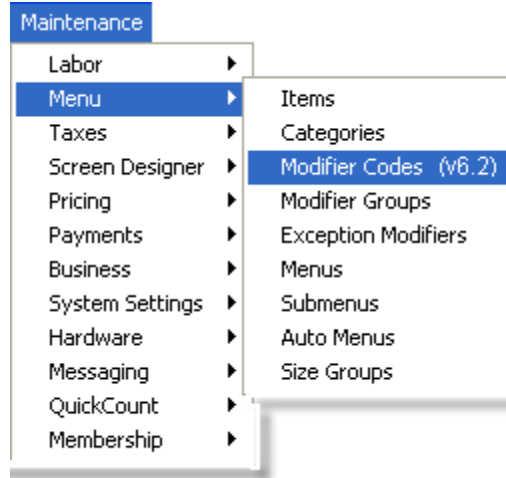


Figure 1 - 13 Example Maintenance Menu POS Version Indicator

Offline mode

Each time you log in to Configuration Center, the system attempts to connect with the hosted, centralized database. If a connection cannot be established, Configuration Center converts to 'offline' mode. Offline mode enables you to perform the same functions as when connected to the host database; however, the changes you make while in offline mode are saved to the in-store database until Configuration Center resumes a connection with the host. When a connection is reestablished, Configuration Center synchronizes the centralized database with the store data.

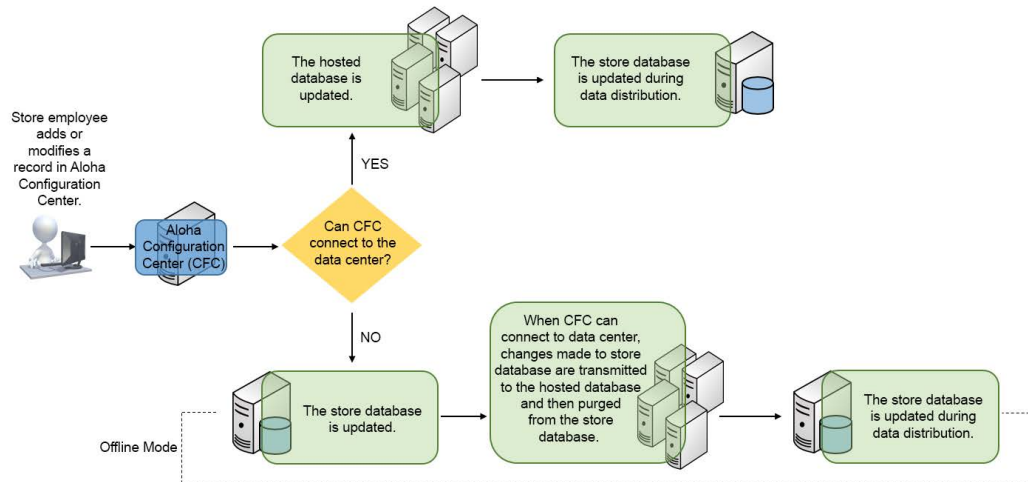


Figure 1 - 14 Offline Mode High Level Process Flow



Caution

Aloha Configuration Center only works in offline mode at a store when a local database exists at the store.

When Configuration Center cannot connect to the host at login, an Offline message appears, asking if you want to proceed in offline mode.

If you select **Yes**, the system continues the login process and opens Configuration Center. A label (***)Offline(***) appears on the Main screen header bar to indicate Configuration Center is running in offline mode. If you select **No**, Configuration Center shuts down, and you can try to log in at a later time.

As mentioned earlier, when you are working in offline mode, you have access to all of the Maintenance menu functions. As you work in a function screen and click Save or Delete, the system

checks to see if the host is accessible. If the system can establish a connection, a Network Connection Established message appears, prompting you to exit and log back in to Configuration Center.

 **Tip**

If you must add a new employee while in offline mode, you can only grant them system access of POS Only, which allows them to access Front-of-House terminals only.

When you log back in to Configuration Center, any changes saved to the in-store database are transmitted to the hosted, centralized database and subsequently, purged from the in-store database. The next time a data distribution process occurs at the store, the records are retrieved from the hosted database, and re-saved to the in-store database, following the normal export process.

If the export process runs at the store before any changes made in offline mode are transmitted to the hosted database, the system combines those changes with any new updates from the hosted database, and then updates the POS data files.

The changes you make while in offline mode are serialized, and if one cannot transmit successfully to the host, then none of the changes are transmitted to the host. This ensures data integrity and synchronization is maintained at all times, even when recovering from offline mode.

When a connection is re-established, the system also checks to see if changes were made concurrently, to the same record. If changes were made to a record and saved to the hosted database, while you were making changes to the same record while working in offline mode, Configuration Center accepts the first set of changes, and your changes are not allowed. In this situation, a Save Failed message appears, informing you that the record has been updated or deleted by another user.

 **Tip**

Real-time updates still occur at a store during offline mode, as long as the 'Disable real-time update' option is cleared, in Maintenance > Business > Corporate Administration.

Real-time updates

As a store manager, you might need a new cashier to have immediate access to the FOH terminals to start training, or, have an urgent need to change the price of a menu item. If the need arises while the restaurant is busy, it might be difficult to perform a refresh, which brings down the terminals to update the FOH terminals with the new information.

To accommodate situations such as this, Configuration Center provides a Real-Time Update feature that enables you to send certain record changes to the FOH terminals, without the need to bring down the terminals through the normal refresh process.

You can update your most critical POS changes on the BOH system, and perform immediate updates to the FOH terminals, if necessary, before normal End-of-Day processing, or a manual refresh process.

When you add or edit certain function screen options on the BOH server, a Real-Time Update message box appears, asking if you want to perform a real-time update. If you select Yes, the system creates a separate transaction file that the FOH terminals read immediately; thereby, updating the terminals with the new information. If you select No, the system does not update the FOH terminal immediately, the changes are saved to the database, and remain there until you perform an End-of-Day process, or a manual refresh.

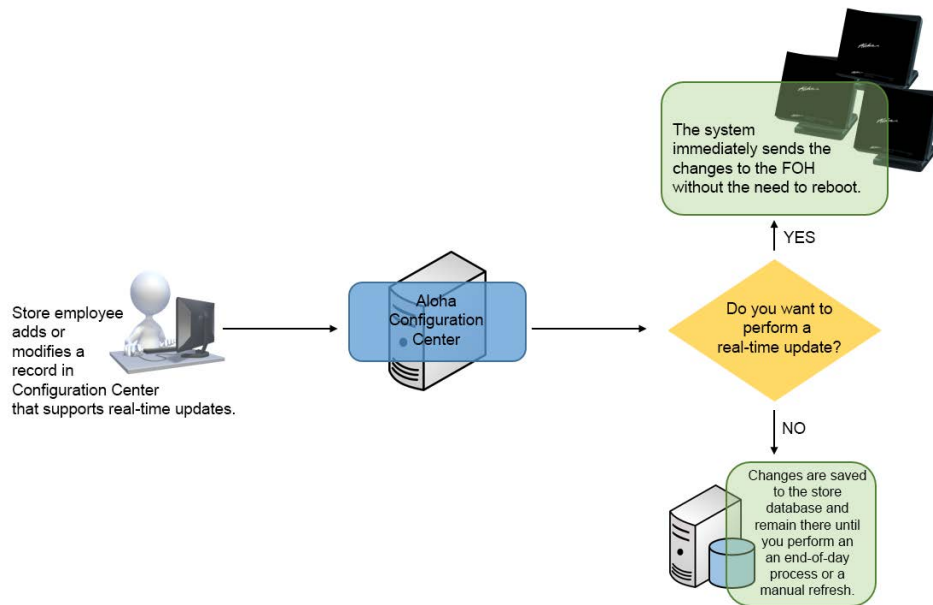


Figure 1 - 15 Real-Time Update Process Flow

A 'Don't show again' check box also appears on the Real-Time Update message box. If you select the check box, the Real-Time Update message does not appear again, while you continue to work in the current function screen; however, when you close the function, the system resets the message, and the Real-Time Update message appears the next time you work in that function screen.

When you add or edit specific options in the following Maintenance functions, the changes trigger the Real-Time Update message box:

- Items
- Employees
- Price Changes
- Foreign Currency
- Movies



Tip

To disable the Real-Time Updates feature, select 'Disable real time updates' in Maintenance > Business > Corporate Administration > Corporate Owner tab.

POS updates

POS database changes you make in your BOH application, as well as updates made by corporate that are sent to a store through the data distribution process, are stored in your local database. To update your POS with the data from your local database, you need to perform a Refresh or Update process. Typically, this process occurs automatically when the end-of-day process runs; however, there may be times you need to perform the refresh or update manually, before end-of-day occurs.

When the corporate office, franchisee, or store makes additions or changes to the Configuration Center database, such as a new menu item, or a modified tax rate, the system stores updates on the centralized database at the data center. You must transport these updates to each applicable store, using the data distribution process, to enable the POS system at the store to use the new data. You can retrieve current POS data from the centralized database and perform a refresh to update the FOH terminals with new data for the **current business day**. You have the option to update your FOH terminals immediately with the new data, or wait until a time more convenient for the store.

You can also perform an update to retrieve data for the **next business day**. When you perform an update, the system searches for database records that are scheduled to be active the **next business day**, and places those records in a temporary directory, in preparation for the end-of-day process.



Caution

You must be logged in as a store-level employee to perform a refresh or update.

Each store must perform a refresh to receive POS database additions and changes for the current day, and update the POS system with the new database records.



Note

If you have an end-of-day (EOD) event configured to run at your store, the refresh process occurs automatically; otherwise, you must manually perform the refresh process. Additionally, the system allows you to immediately update FOH terminals with certain changes made at the store-level, such as new employee records, without the need to bring down the FOH terminals.

The following steps occur during the refresh data process:

- When you select **Utilities > Refresh Data**, the system connects to the centralized database at the data center, to obtain the most recent database records. If the database administrator for the corporate office, or a franchisee, makes additions or changes to the centralized database, new or updated records may be available for your store.
- A Data Distribution service runs at the data center, to distribute database records from the centralized database, to the local SQL Express database at your store. Only those database records applicable to your store are sent to your store. These records might be global- corporate-,

franchisee-, or store-owned records, which, based on the record hierarchy level of the record, are considered available for use at your store.

- An export service runs on your store file server, to generate a new set of POS database files. These files include any database changes, as well as any database records that are valid for the **current business day**, based on an associated event or activation schedule that is active. The new POS database files are stored in a temporary directory, then copied to the \NewData subdirectory.

The system brings down the FOH terminals, forces an update of database and configuration files from the \NewData subdirectory to the \Data subdirectory, and restarts the FOH terminals. Any new, active records are now available on the FOH terminals at your store.



Note

The Update Data process is similar to the Refresh Data process, except instead of retrieving data for the current business date, the system retrieves data for the next (i.e., tomorrow's) business date.

Chapter 2: Getting started

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Getting started

Once you understand the key concepts for using Aloha Manager or Aloha Configuration Center as your configuration management tool, you are ready to learn how to manage your data.

Starting the system

Start Aloha Manager or Aloha Configuration Center from the shortcut that appears on your desktop.



Figure 2 - 1 Aloha Manager and Configuration Center Application Icons

To start the system:

Double-click the **Aloha Manager or Configuration Center icon**. The system establishes a connection with the Host server (at the Data Center).

After a connection is made, the system verifies you are on the most current version of the application. If you are on the most current version, the Login screen appears for you to log in to the system.

Note

If you are the first person to log in to the system after the initial installation, you receive the End-User License Agreement (E.U.L.A.) screen. You must read/scroll to the bottom of the screen before the Accept button becomes available. Accept the agreement to continue the login process. If you decline the agreement, the system will not start.

If a system update is available:

If your application is not on the current version, updates are downloaded to your computer, and a Downloading message box appears, to display the status of the update process. If the system cannot perform an update, an Update Failure error message appears, instructing you to contact your first line of support.

After the system performs an update, close the **Downloading message box**, and then double-click the **Aloha Manager or Configuration Center icon** again, to access the Login screen.

If a connection cannot be established (for Aloha Configuration Center only):

If Aloha Configuration Center cannot connect to the host, a Network Problem error message appears, asking if you want to try and reconnect. If you select Yes, the system will try again to connect with the Host server. If you select No, Aloha Configuration Center will not start, and you may need to contact your first line of support.

Logging in

You must log in before you can begin to use the system. The Login dialog box has a User name, Password, and Owner option. Your POS database administrator or manager provides you with your 'user name,' which can be up to 25 characters, as well as a temporary 'password,' if passwords were set up at time of installation.

If you are logging in at a store, the 'Owner' option automatically defaults to your store; however, if you are not logging in at a store, you may need to know the 'owner' assigned to your employee record. For example, a corporate employee that is responsible for maintaining POS database records for multiple stores might have more than one employee login, each with a different owner, depending on the level of access required for certain tasks. In this situation, the employee must select the correct owner when they attempt to log in, or they will not gain access to the system.

To log in for the first time:

1. Click the **Aloha Manager** or **Configuration Center icon** on your desktop to launch the system. The Login dialog box appears.
2. Type your **user name**.



Tip

If you are a former Aloha Manager user, you can use the same user name you used for the previous Aloha Manager Back-of-House (BOH) system.

Tip

3. Type your **Password**. If you did not receive a password, skip the **Password** option.
4. Select the **Owner** from the 'drop-down' list, and then click **OK** to log in to the system.

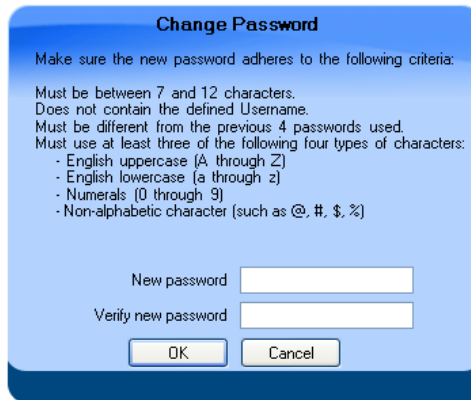


Tip

For Aloha Configuration Center users: If you are logging in on a store file server, the owner defaults to the store. If you are not on a store file server, the owner defaults to the first corporate owner in the list. If more than one owner is available, you must select the owner that is tied to your employee record. If you do not know this information, contact your POS database administrator.

Tip

The New Password dialog box appears.



This screen also appears when you log in after your password was cleared or expires.

Figure 2 - 2 New Password Dialog Box

5. Type a **new password** in the 'Enter new password' and 'Verify new password' text boxes, and then click **OK** to activate the new password. Asterisks (***) appear, to represent each character you type.

Passwords are case-sensitive. The new password must meet the following requirements:

- a. Passwords must contain 7 to 12 characters
- b. Passwords must not contain the 'User name' of the employee
- c. Passwords must contain at least three of the following four character groups:
 - English uppercase (A through Z)
 - English lowercase (a through z)
 - Numerals (0 through 9)
 - Special character (i.e. ! @ # \$ % ^ & * () _ +)

Example of a strong password: Nojog1!

Example of a weak password: PORSCHE

 **Note**

If you are the first person to log in to the system after the initial installation, you receive the End-User License Agreement (E.U.L.A.) screen. You must read/scroll to the bottom of the screen before the Accept button becomes available. Accept the agreement to continue the login process. If you decline the agreement, the system will not start.

The Main screen appears with available features, based on your assigned security access level.



Note

If you log in at a store and automatic data distribution with the data center is stopped, the following error message appears. Click Yes to start the service. If you click No, automatic data distribution will not occur; however, you can start the service at a later time, through Control Panel > Performance and Maintenance > Administrative Tools > Services.

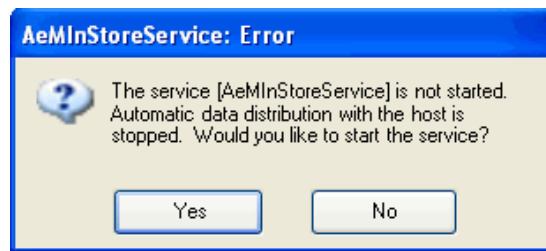


Figure 2 - 3 Service Error Message



Tip

For subsequent logins, you must enter both your user name and password, as well as select an owner (if applicable) to access the system.

Problem with logging in?

Logging in from corporate or remote location: *For Configuration Center users only:* If there is a connection failure between Configuration Center and the host database at the data center, a Network problem error message appears with details about the connection error.

Logging in from a store: *For Configuration Center users only:* When Configuration Center cannot connect to the host at login, a message appears, asking if you want to proceed in offline mode.

1. If you select **Yes**, the system continues the login process and opens Configuration Center. A label (**Offline**) appears on the Main screen header bar to indicate Configuration Center is running in offline mode.
2. If you select **No**, Configuration Center will shut down, and you can try to log in at a later time.
 - If you entered an incorrect user name or password, a Login failed error message appears. Note: You can attempt to log in four times; after that, the application shuts down and you must restart the application.
 - Make sure the owner you select is the owner assigned to your employee record. If it is not, you will not be able to log in to the system.
 - If your employee status is not 'Active,' the system will not allow you to log in.

- If your password was reset by a manager, follow the steps to log in for the first time. The New Password dialog box appears when you log in, and you must enter a new password.
- If your password expires, you must enter a new password at login. Passwords are case-sensitive, and must meet the requirements specified in “Logging in.”

Session time-out

When a login session is inactive for a specific time period (i.e., no keyboard or mouse activity), the system locks the session and displays a password screen. When this happens, only the current user of the system can log back in. The following message appears:

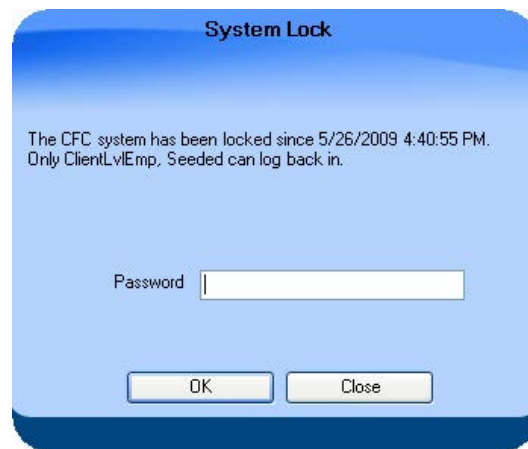


Figure 2 - 4 System Lock Message Appears After Session Time-out

If you are not the current user, you must click the **close icon (X)**, and then restart the application, to log in. If there are any changes that have not been saved, a warning message appears. If you click **OK**, the system closes and discards any pending changes. **Related Option:** You set the time-out duration in Maintenance > Labor > Security Roles.

User lockout after a specified number of login attempts

The Lockout feature enables you to lock an employee out of the system after a configured number of unsuccessful attempts by the employee to log in. When an employee exceeds the specified number of attempts, an ‘Exceeded number of login attempts’ message appears.

In this situation, the employee can only access the system after their password is reset and they obtain a temporary password. After logging in with the temporary password, the system prompts the employee to change their password immediately, for security purposes.

Related Option: You set the number of lockout attempts in Maintenance > Labor > Security Roles.

Expired passwords

You can set an expiration period for employee login passwords. The security role assigned to the employee record controls when a password expires. When a password expires, the system prompts

the employee to create a new password before they can proceed to access the system. Use the 'Password expires after this many days' option in **Maintenance > Labor > Security Roles** to define an expiration period.

If your password expires, you must enter a new password at login. Passwords are case-sensitive, and must meet the requirements specified in "Logging in."

Changing your password

Use the Change Password command to change your login password at any time, for security purposes. You must know your current password in order to change your password.

To change your password:

1. Select **File > Change Password** from the main menu, and the Change Password dialog box appears.

Figure 2 - 5 Change Password Dialog Box

2. Type your **current password**.
3. Type a **new password** in the 'Enter new password' and 'Verify new password' text boxes. Asterisks (***) appear, to represent each character you type.

Passwords are case-sensitive. The new password must meet the following requirements:

- a. Passwords must contain 7 to 12 characters
- b. Passwords must not contain the 'User name' of the employee
- c. Passwords must contain at least three of the following four character groups:
 - English uppercase (A through Z)
 - English lowercase (a through z)
 - Numerals (0 through 9)
 - Special character (i.e. ! @ # \$ % ^ & * () _ +)

Example of a strong password: Nojog1!

Example of a weak password: PORSCHE

If the current password is incorrect, or the information in the 'Enter new password' and 'Verify password' text boxes does not match, an error message appears. At this point, try again, or click **Cancel** to exit the Change Password dialog box.

4. Click **OK** to activate the new password.

Logging out

You can log out of the system without closing the application completely.

To log out of the system:

1. From the Menu bar, select **File > Log out**. If there were any unsaved record changes, the system prompts you to save the data before logging out.
2. Select one of the following:
 - Select **Yes** to save data changes.
 - Select **No** to close the system without saving data changes.The system returns to the Login screen.

Exiting the system

When you exit, the system not only logs you out, but also closes the application completely. When you exit the application, you must restart the application before you can log in.

To exit the system:

1. From the Menu bar, select **File > Exit**. If there were any unsaved record changes, the system prompts you to save the data before exiting.
2. Select one of the following:
 - Select **Yes** to save data changes.
 - Select **No** to close the application without saving data changes.

Touring the user interface

The redesigned user interface delivers maximum productivity while retaining the existing features and functionality of previous versions of Aloha Manager. We understand that operators become quite efficient at performing tasks in a certain manner, and it can be quite a shock to have to learn how to navigate through a new design. Our goal was not only to ensure you could still perform functions with ease, but that you would now be able to perform these tasks in a more efficient manner, especially if you manage data for multiple stores. The new and improved interface promotes a smaller learning curve, allowing you to quickly resume day-to-day functions for your operation as you maintain POS data for your organization.

Main screen components

The Main screen is the first screen you see when you log in to the system. The Main screen remains visible at all times, while you work in the system. The user interface takes a fresh approach to data entry. It leverages the latest look and feel of 'grid-style' application screens, and offers a mix of rich features and tools. You will quickly become accustomed to this redesigned application. The simple, yet intelligent layout makes the interface so easy to use.

**Note**

The active products and features at your site control what is available to you when you log in to the system. You may have more or less than what appears on this screen.

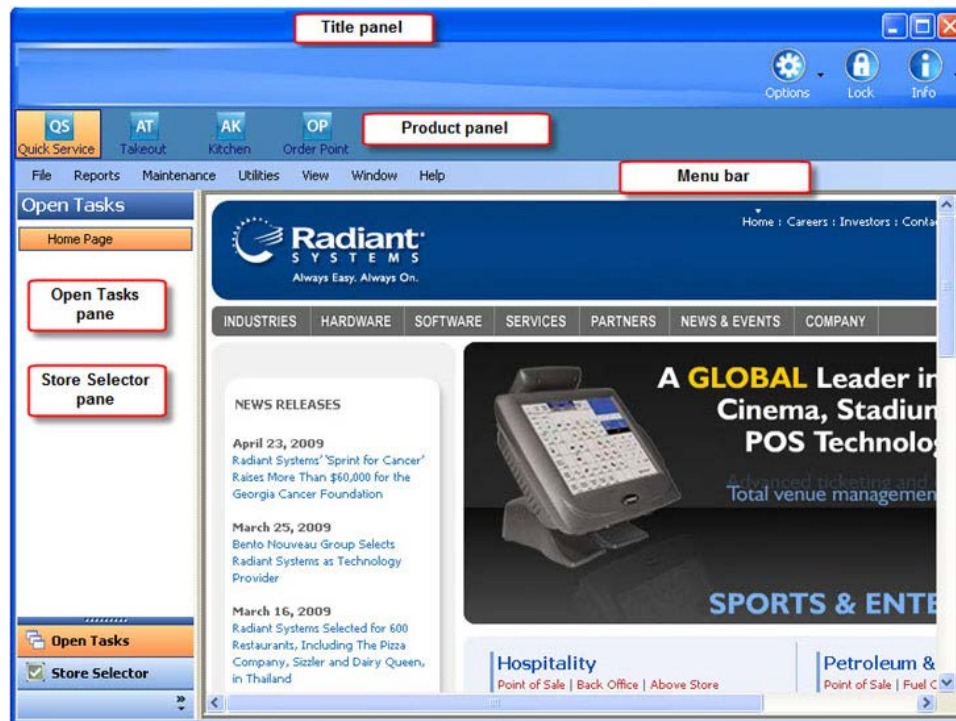


Figure 2 - 6 Main Screen

The following components appear on the Main screen:

Title bar

The Title bar appears at the top of the screen, and displays the company name defined in the centralized, hosted database.

Options

Enables you to change your user password, log out of the system, or exit the system completely.

Lock

Locks the system workstation. You must use your user name and password to regain access, similar to when you are automatically locked out due to a defined period of system inactivity.

Info

Provides links to very helpful information, such as the online Help, license agreement, and the 'About this product' version information.

Product panel

The Product panel appears under the Title panel, and displays the additional Aloha applications for which you may have a license to access. This panel enables you to switch between applications and return to the core Aloha Manager or Configuration Center application, as well. A separate icon for each application you are authorized to use appears on this panel.

Menu bar

The Menu bar appears under the Title bar, and displays the File, Functions, Reports, Maintenance, Utilities, Labor Scheduler, User Tools, View, Window, and Help menus.

File menu

The File menu allows you to change your password, log out of the application, or exit and close the entire application.

Functions menu (appears on store file server)

The Functions menu provides access to manage basic labor and employee schedule functions. You also use this menu to assign checkouts, distribute tips to employees, and edit and post to house accounts. Additionally, you can access third-party accounting applications through the Functions menu. **Note:** This menu only appears when you log in from the file server at a store.

Reports menu

The Reports menu provides the same common BOH reports as the previous Aloha Manager, but also includes new reports specific to the system, such as the Audit report. **Note:** The POS Reports menu only appears when you log in from the file server at a store.

Maintenance menu

The Maintenance menu enables you to access the function screens to add or modify records in the database. Use this menu to define and maintain the database components and parameters you need to run your restaurant. From the menu items you offer at your restaurant, to the hardware you use and the employees you hire, use this menu to store all database information.

Utilities menu

The Utilities menu enables you to perform system-related functions, such as data imports, updating the POS with current data, forcing End-of-Day, viewing debugging files, and more.

Labor Scheduler menu (appears on store file server)

The Labor Scheduler menu invokes the Aloha Labor Scheduler application. The Labor Scheduler menu provides access to the advanced, yet simple-to-use Aloha Labor Scheduler application. This application enables you to create employee work schedules based on shift requirements for each work day **Note:** This menu only appears when you log in from the file server at a store, and if you are using Aloha Labor Scheduler.

User Tools menu

The User Tools menu provides access to the User Tools function, from which you can configure the system so that you can access other external applications, such as Microsoft Word and Excel.

View menu

The View menu allows you to display or hide the Function panes.

Window menu

The Window menu enables you to navigate to any open screen, similar to the Open Tasks pane. You can also close all screens at one time using this menu.

Help menu

The Help menu enables you to access online Help and also displays an About dialog box that lists copyright and version information for Aloha Manager or Aloha Configuration Center.

Function pane

The Function pane is the column on the left side of the Content area that includes feature panes, such as Open Tasks and Store Selector. The Function pane also provides centralized navigation and quick access to open function screens. The Function pane is an optional panel, which you can hide, as necessary. To close or reopen the Feature pane, select **View > Function Pane** from the Menu bar. The different panes and options available in the Function pane are described below.

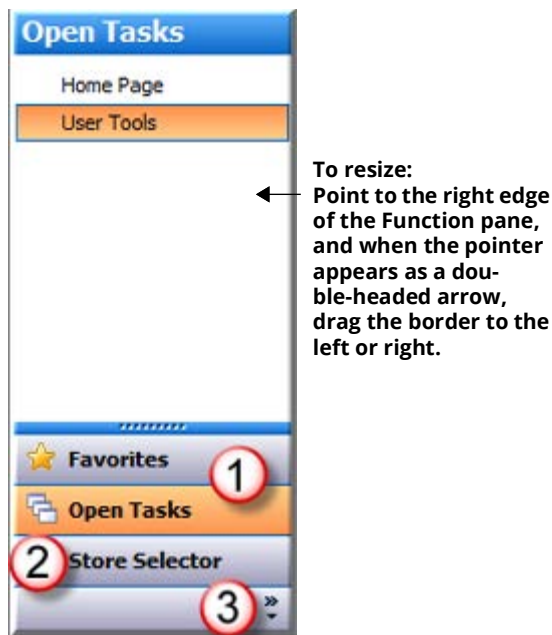


Figure 2 - 7 Function pane

1 Open Tasks pane and Favorites pane

The **Open Tasks** pane appears on the left side of the screen, and displays any function screens that are currently open. You can click a **function name** in the list, to quickly navigate to that function, or access the Home page.

The **Favorites pane**, which replaces the Navigation bar in the old Aloha Manager, allows you to store your most frequently used functions in an easy to access area. To customize, click the **Favorites panel**, and then right-click anywhere in the panel to display the Customize dialog box. You can drag and drop your selections, such as any User Tools you defined, in the Favorites column, and then click **OK** to confirm.

2 Store Selector pane (for Configuration Center users only)

The Store Selector pane enables corporate- and global-level employees to load data for select stores. This feature minimizes the amount of store-level records to filter through at any given time, which maximizes system performance.

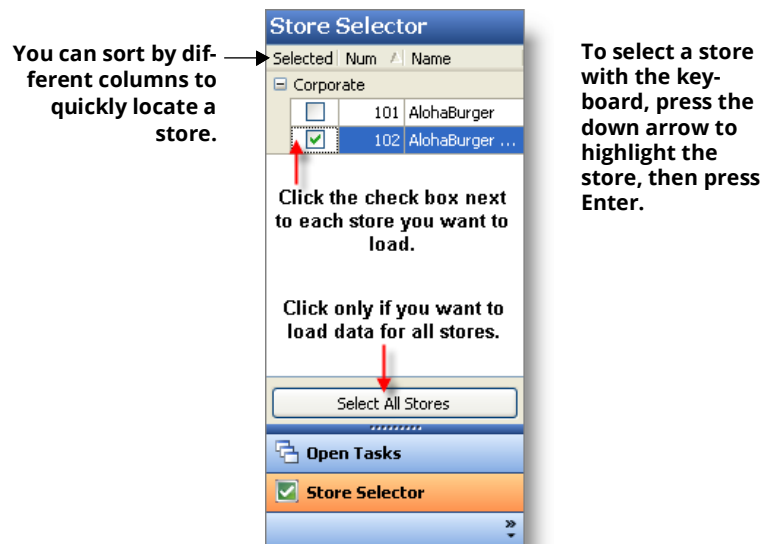


Figure 2 - 8 Store Selector Pane

Note

When you log in from a store file server, the system automatically loads the store-level data. Additionally, if you are logged in as a store-level employee, the Store Selector feature is disabled and the system automatically loads the data for your store.

The first time you access a store-specific function, such as Printers or Employees, without having first selected a store, a message appears prompting you to select a store. You must use the Store Selector

pane to load data for one or more stores, before you can view, edit, or delete store records. After you load the desired stores, records for those stores will appear in each subsequent store-specific function screen you access. If you need data for a different store, access the Store Selector pane again, to select additional stores. The data for the selected store(s) remains loaded in the system until you exit or log out of the system.

If you access a function that is not store-specific, such as the Jobcodes function, that contains an option that uses store-specific data, such as 'Meal waive message,' one or more store(s) must be selected before you can complete a selection for the option.



Note

For Aloha Configuration Center users only: To disable the Store Selector feature, select 'Disable store selector' in Maintenance > Business > Global Administration > User Interface Options group bar. When disabled, all store-specific records are loaded for store-level maintenance functions.

3 Add and remove Function pane options

You can add and remove panes on the Function pane using the 'Show More Buttons,' 'Show Fewer Buttons,' and 'Add or Remove Buttons' options. Click the **double arrows** at the bottom of the Function pane to display and select options, as necessary.

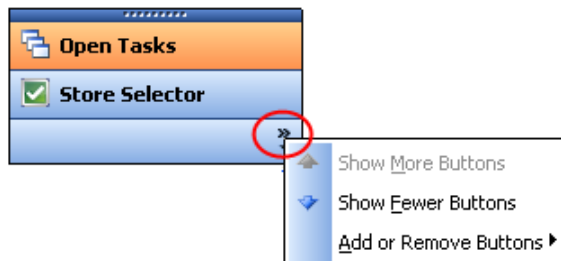


Figure 2 - 9 Additional Options on the Function pane

Function (maintenance) screen components

The function screen enables you to add and edit database records using the Maintenance functions in the system. Although each function screen basically looks and operates the same, the options on each function screen change, depending on the Maintenance function you select.

The function screen uses a vertical grid-style interface to display and edit information. A grid-style interface appears in a tabular, spreadsheet view. This keeps data visible and allows you to edit data without the need, in most cases, to open a separate dialog box. The grid-style interface makes it easier and faster to add and maintain data.

A typical function screen appears below:

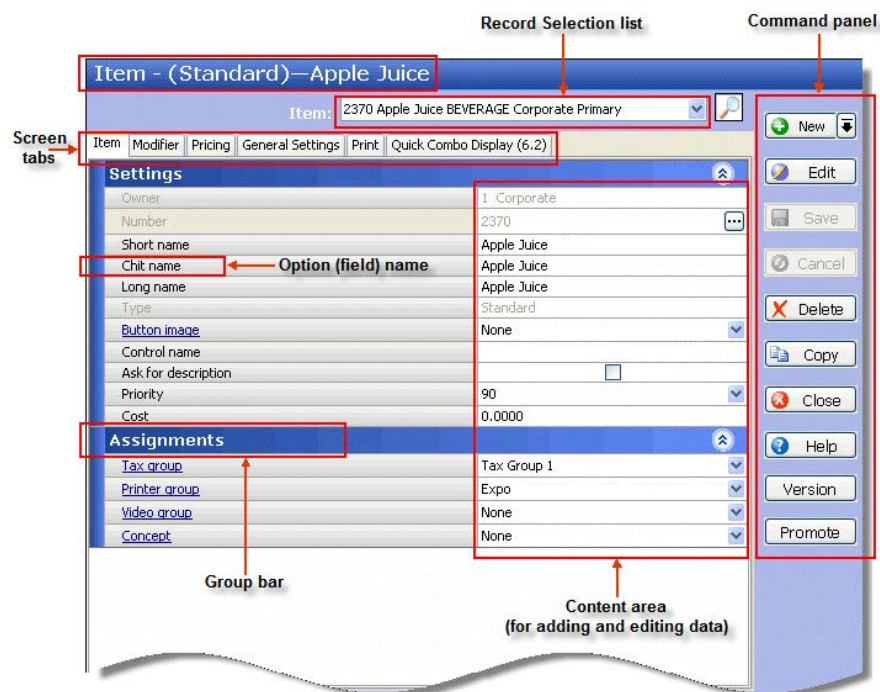


Figure 2 - 10 Function Screen Components

This section describes the layout and features of the function screen, with grid-style view. It covers the following topics:

- Parts of the function screen
- Function screen navigation
- Keyboard shortcuts
- Common buttons and dialog boxes
- Function (maintenance) screen tools

Parts of the function screen

Each Function screen has the following common screen components:

Content area

The content area enables you to view or edit the options for a record defined in the database, for a selected maintenance function. The function screen is designed as a vertical grid with two columns. Option names appear in the left column, and the data entry area is in the right column. Click inside the right column of an option, to type or select a setting.

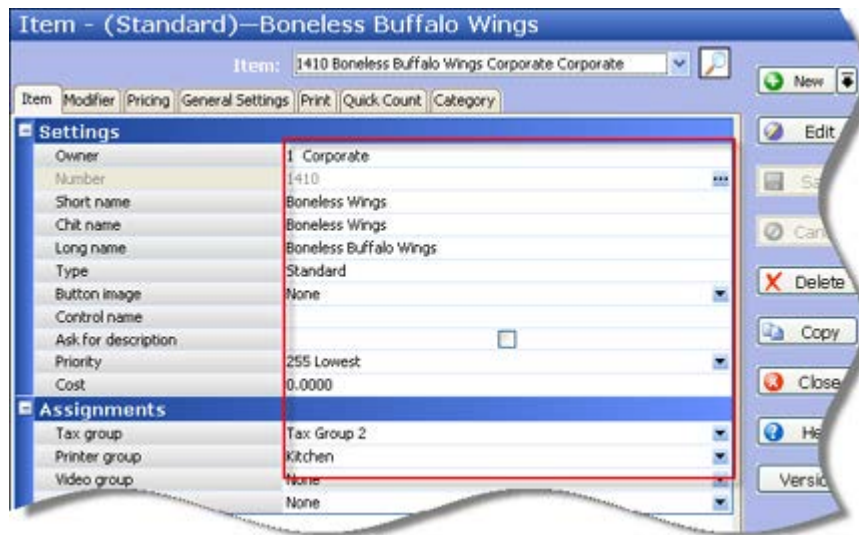
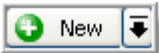
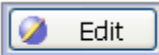


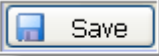
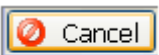
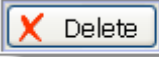
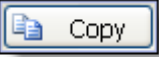
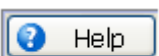

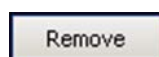
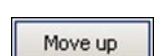
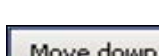
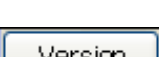
Figure 2 - 11 Content Cells

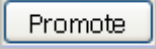
Command panel

The command panel, which appears on the right side of a function screen, contains a standard set of command buttons that perform specific actions, such as add, delete, edit, and copy.

The functions of these buttons are the same on all function screens, and are similar to buttons used in many Windows applications.

	<p>New</p> <p>Starts a new record for the current function. If you click New, the system applies the same record type as the previously added record, or the default record type, if you have not added a previous record.</p> <p>Click the down-arrow next to 'New' to select a specific record type, as well as assign an owner to the record, when necessary.</p>
	<p>Edit</p> <p>Displays a record in edit mode when you click Edit, press Enter, or click anywhere in the function screen.</p>

	<p>Save</p> <p>Saves data to the Aloha database any time you add a new record or change an existing record. If you do not click Save, the system does not store your additions or changes.</p>
	<p>Cancel</p> <p>Exits a function tab without saving additions or changes to the Aloha database.</p>
	<p>Delete</p> <p>Removes an active record from the Aloha database. Delete records with great caution, as deleted records may cause serious errors due to the relational nature of the Aloha database structure.</p>
	<p>Copy</p> <p>Makes an exact duplicate of the currently selected record; however, the system assigns the next available record number, to the duplicate record.</p>
	<p>Help</p> <p>Displays screen-level Help for the current function screen.</p>
	<p>Add</p> <p>Adds a row to a list of items you can associate to the selected record.</p>
	<p>Remove</p> <p>Removes a row from a list of items associated with the selected record.</p>
	<p>Move up</p> <p>Moves a row up in a list of items associated with the selected record.</p>
	<p>Move down</p> <p>Moves a row down in a list of items associated with the selected record.</p>
	<p>Version (For Configuration Center users only)</p> <p>Creates a copy of the selected record for stores that require some settings to be different from the original, primary record. For example, if you are a multi-store organization and one or more of your restaurants requires a different start time for their day part, you can create a version of an existing day part record, modify the start time, and assign it the required stores. The version replaces the primary record for those stores only. When you click Version, the Version Assignment dialog box appears for you to assign the version to a single store, or, a group of stores within a selected hierarchy, such as a 'region.'</p> <p>Note: A version of a primary record always carries the same record number as its primary record.</p> <p>See Also: Version Assignment Dialog Box</p>

	<p>Promote</p> <p>Advances the selected record to the next owner level. For example, if you promote a burger item owned by a specific store, the system advances the record from a store owner, to a corporate owner. This function comes in handy if you decide to make a store-owned menu item available at all your corporate-owned stores.</p> <p>Note 1: You must be logged in as an employee with the same owner level to which you want to promote the selected record. For example, to promote a store-owned record to corporate, you must be logged in as a corporate-level employee.</p> <p>Note 2: You cannot promote a record until you remove any relationships to other records with lower-level ownership.</p>
---	--

Record selection list

The Record Selection list enables you to select, sort, group, and filter existing database records, as necessary. You can select records by number or name, which makes it easy for you to locate existing records. You can also type the first few numbers of a record number to quickly locate a record.

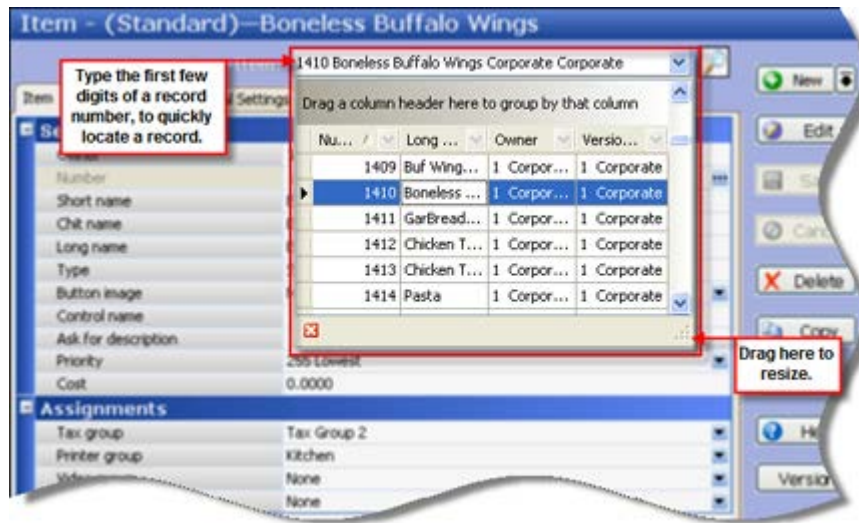


Figure 2 - 12 Record Selection Drop-down List

Screen tabs

Each function screen uses a series of tabbed screens to sort and categorize options in a logical workflow. Use the tabs to navigate to all the options required when creating a record.

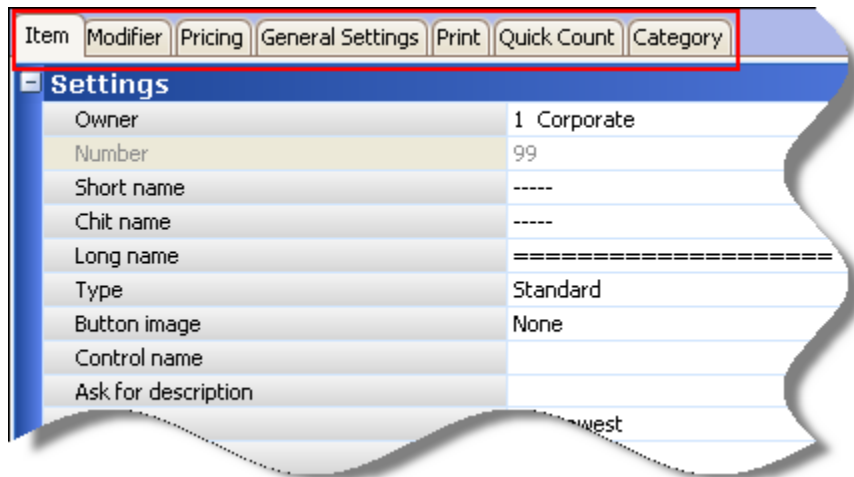


Figure 2 - 13 Example Function Screen Tabs

Group bar

The first row of every grid section is labeled with a group bar. Group bars help organize options on a grid. You can collapse and expand sections of the grid. Click **+** or **-** to expand or collapse the group bar.

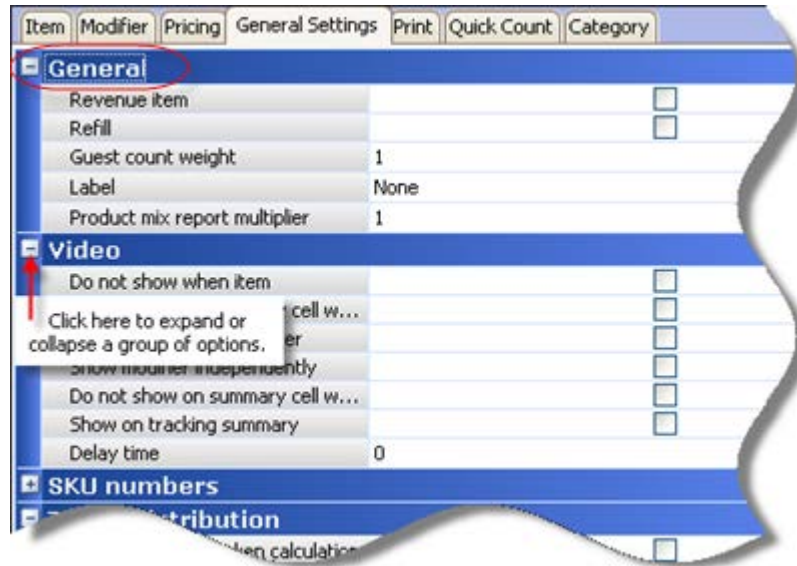


Figure 2 - 14 Example Group Bar

POS version indicators *(for Configuration Center users only)*

The system supports companies with stores on different versions of the Aloha POS. A store employee that accesses the system can view only those options for the version of Aloha currently installed at their store. However, a corporate employee that accesses the system can view options that correspond to the range of different POS versions installed at their stores, starting from the earliest to latest POS version.

A version number (e.g., **v6.2**) appears next to an option, to indicate the version of Aloha POS in which the option was introduced. The indicator appears next to any POS-related option that is later than v6.1.

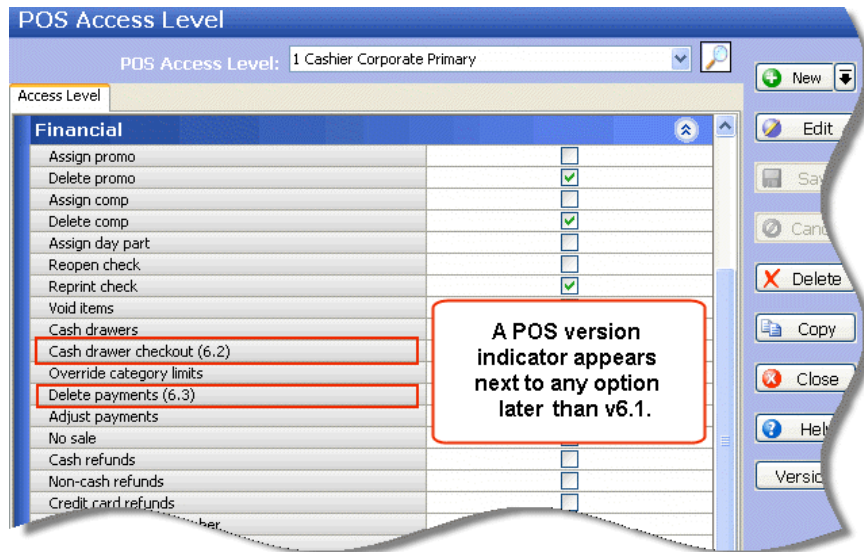


Figure 2 - 15 Example of a POS Version Indicator

To learn more about how Configuration Center supports multiple POS versions, see “Multiple POS Version Compatibility” in the Key Concepts section of the online Help.

Common buttons and dialog boxes

There are a few buttons and dialog boxes that appear on many of the function screens. This section provides a description for each of these common buttons and dialog boxes.

Drop-down arrow

 Displays a list of choices from which you can select for the current option.

Ellipses button

 Opens a secondary dialog box, such as the Fonts, Number Assignment, or Multi-Media Selection dialog box, to set additional parameters for a selected option.

Calendar

The calendar drop-down box enables you to select a date, as applicable for certain function options, such as when you define dates in the s function. Click the **down-arrow** next to a Date field, to display the calendar.

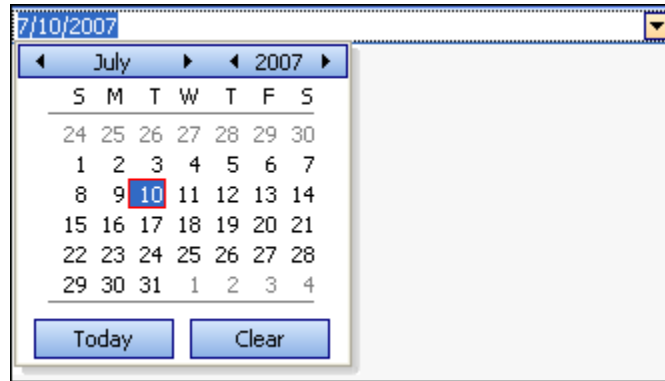


Figure 2 - 16 Calendar

Owner and type dialog box

The Owner and Type dialog box enables you to assign a specific owner to a record, when you add a new record to the database, as well as select the type of record you are adding, when more than one record type is available. Click the **down-arrow** next to 'New,' to select an owner, and a record type, when applicable. For example, if you want a record available at a specific store, you select the store from the depending on how you plan to use a database record, you might assign the 'Global' owner

to a record, which makes the record available for use at all store locations, in a multi-store organization.

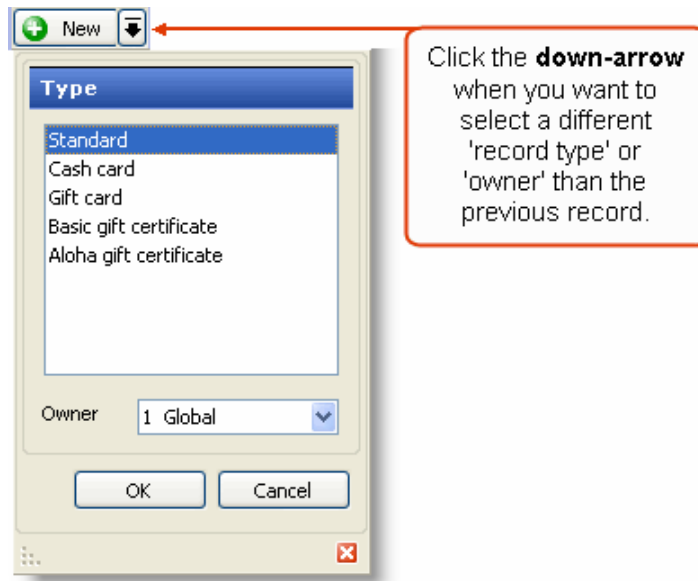


Figure 2 - 17 Owner and Type Dialog Box

Number Assignment dialog box

The Number Assignment dialog box enables you to specify how the system determines the next available record number. By default, the system assigns the next available record number to a new record; however, you might want the system to assign a record number using a different method. For example, this is a useful feature when you want the system to automatically number new menu item

records in incremental numbers (e.g., 2000, 2005, 2010, 2015, and so on). Click the **Ellipses button (...)** next to the 'Number' option to display the Number Assignment dialog box.

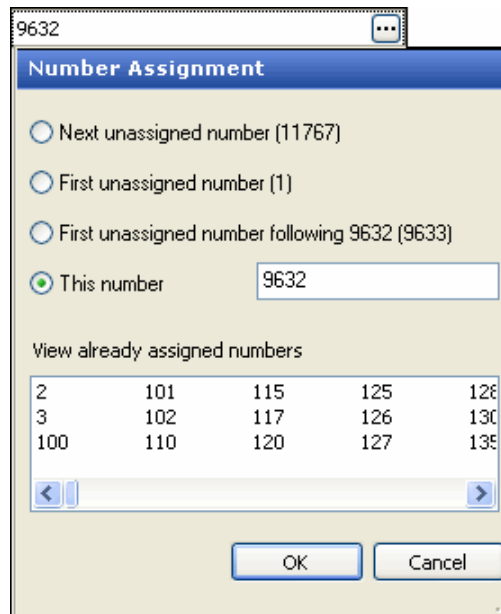


Figure 2 - 18 Number Assignment Dialog Box

Select from one of the following options:

- **Next unassigned number** starts with the last number assigned to a record in the database, and searches for the next available number to assign.
- **First unassigned number** starts with the first number assigned to a record in the database, and searches for the next available number to assign.
- **First unassigned number following n** starts with the currently displayed number, and searches for the next available number to assign.
- **This number** enables you to type any valid, unassigned number of your choice. This option defaults to the same number as the 'First unassigned number following' option. If you type a number that is already in use, or reserved for a different item type, an error message appears.
Note: If you want to specify a number, use the '**View already assigned numbers**' view list to quickly see the numbers already in use.

Tip

If you change the Number Assignment method while in a function screen, and then close the function, the system reverts back to using the next available number as the numbering method, when you re-access that function.

Version Assignment dialog box (for Configuration Center users only)

The Version Assignment dialog box enables you to create a version of an existing record, to effectively handle POS database variations at different stores. When you create a version, you need to assign the version to one or more stores. Click **Version** on the Command panel, to display the Version Assignment dialog box.

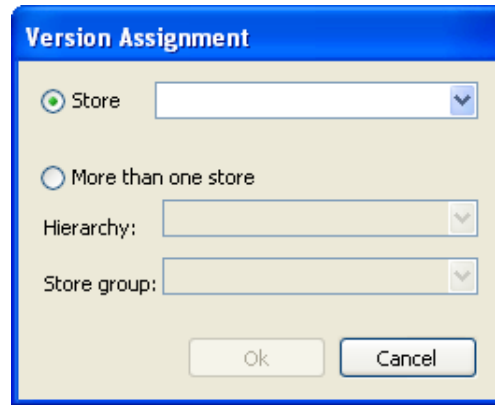


Figure 2 - 19 Version Assignment Dialog Box

Select **one** of the following options:

- **Store** - Allows you to select the specific store to which you want to assign the version.
- **More than one store** - Allows you to first select a specific hierarchy, such as 'region,' that contains a number of predefined store groups. After you select the hierarchy, select the specific store group, within that hierarchy, to which you want to assign the version.

Function (maintenance) screen tools

The user interface offers very useful tools to help you perform tasks on the function screen quickly, and more efficiently. This section describes the new interface tools and features.

Drag and drop grouping

An easier way to group item records is now available. Click the down-arrow next to the Record Selection list, and drag a particular column by its header onto the group panel. Right-click the group to display even more grouping and sorting options. You can reorder the columns so the columns you use most frequently are visible. This feature is also useful if you want to order your records by a different column heading, such as by Name, instead of Number.

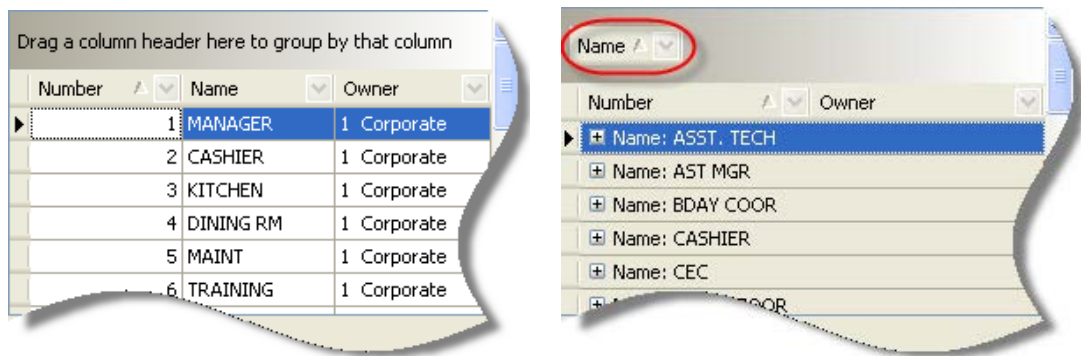


Figure 2 - 20 Group and Sort Options

- To sort a column in ascending order, click a column heading until an up arrow appears.
- To sort a column in descending order, click a column heading until a down arrow appears.
- To display advanced group and sort options, right-click a column heading.

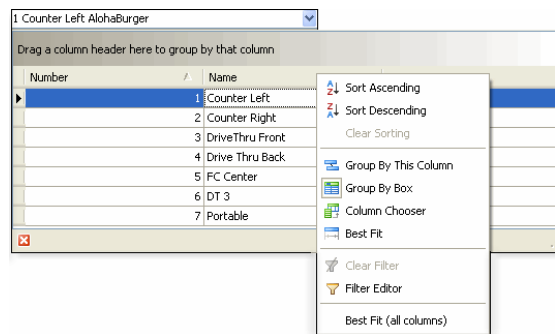



Figure 2 - 21 Right-click a Column to Display Advanced Sorting Options

Search tool

The new search text box and button  appears above the Record Selection list. The Search tool makes it easy for you to find a record because not only does the system list only the records matching

your search term in the Record Selection list; moreover, the system ranks the records most likely to be an exact match to your search criteria. This tool makes it a breeze to search through thousands of records to find the one record you need.

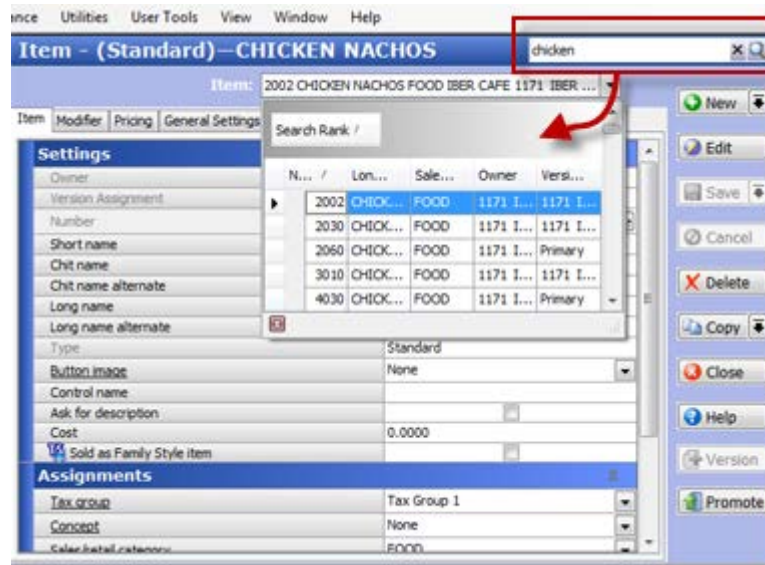


Figure 2 - 22 New Search Tool

Compare Records feature

The Compare Records feature enables you to compare the option settings that are different between two records. For example, if you need to understand why a particular version of a primary record was created, you can compare the options between the primary and versioned record, to determine if the versioned record is needed in your current database.

To use the Record Comparison feature, you must first be in an active function screen. While in the function screen, select **File > Compare Records** (or press **Ctrl+F5**). The Record Comparison dialog box appears, with a Base Record column and Comparison Record column.

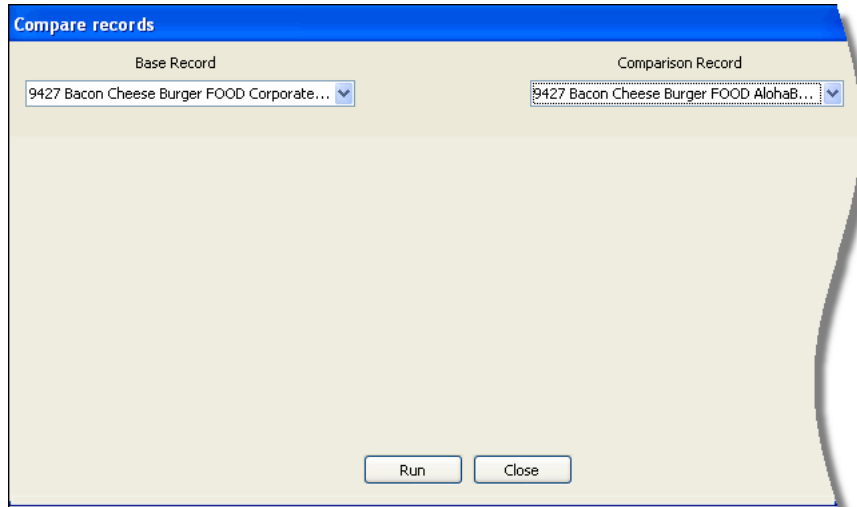


Figure 2 - 23 Record Comparison Dialog Box

Select a **record** from the 'Base Record' column, and then select a **record** to compare, from the 'Comparison' column. When you click **Run**, the system checks the option settings for each record and displays any options for which the record values do not match.

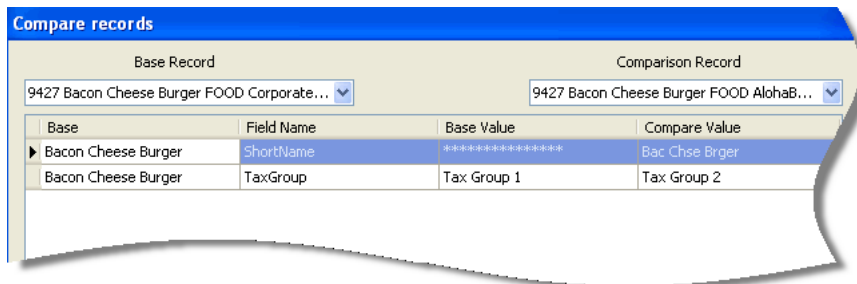






Figure 2 - 24 Record Comparison Results

Function screen navigation

The function screen uses a new “grid-style” user interface, which offers multiple ways to work with the rows, columns, and cells in a function screen. The following table describes how to work with data in the content area of the function screen:

To perform this task...	Do this...
Edit data	Click inside a content cell and type text or select from a list of pre-defined parameters.

To perform this task...	Do this...
Select a single row	Click the desired row with your mouse, or press Tab to select a row.
Select multiple rows	Hold down the Ctrl key and click each desired row .
Resize a row	Drag the row edge arrows to the desired row height . 
Resize a column	Drag the column edge arrows to the desired column width. 
Expand or collapse a group bar	Click the  or  signs to expand or collapse the options under a specific a group bar. You can also select the desired group bar , and then press Ctrl+Plus or Ctrl+Minus to expand or collapse the options. This comes in handy if you are in a function screen with many options.

Keyboard shortcuts

In addition to using the mouse to make selections, you can use keyboard combinations to quickly navigate through or make selections on a function screen within Quick Service.

Press...	To...
F1	Display context-sensitive Help for a selected option. If an option is not selected when you press F1, screen-level Help appears for the current function.
Ctrl+Tab	Move to the next screen tab.
Tab	Move downward one option at a time.
Shift+Tab	Move upward one option at a time.
Space bar	Select or clear an option. Click a check box or option to activate/deactivate the setting, or tab to the desired setting and press the Space bar to select or clear an option.
Up and Down arrows	Move upward or downward through the options in the database record.
Ctrl+C	Copy highlighted data to the Windows Clipboard for subsequent use in another location.
Ctrl+X	Remove (cut) highlighted data and copies it to the Windows Clipboard for subsequent use in another location.
Ctrl+V	Paste information from the Windows Clipboard to an active location, with the cursor designating the point of insertion.

Working with records

Aloha Configuration Center and the new Aloha Manager provide you with tools that make working with records easy and efficient. You can create a new record and then use the copy function create another identical record and just make modifications.

Creating a record

The basic steps to create a record in the system are generally the same, no matter the function screen. Of course, depending on the function screen you have open, there are different options you may need to complete, but the overall process doesn't change.

To create a basic record:

1. Access the **Maintenance menu** from the Menu bar, and select the **function** for which you want to add a record. The selected function screen appears.
2. Click the **drop-down arrow** next to 'New.' The Owner and Type dialog box appears.
3. Select the **record type**, if applicable, as well as the **owner** to assign to the record, and click **OK**. The Screen tab appears with the owner and default number assigned to the screen record.

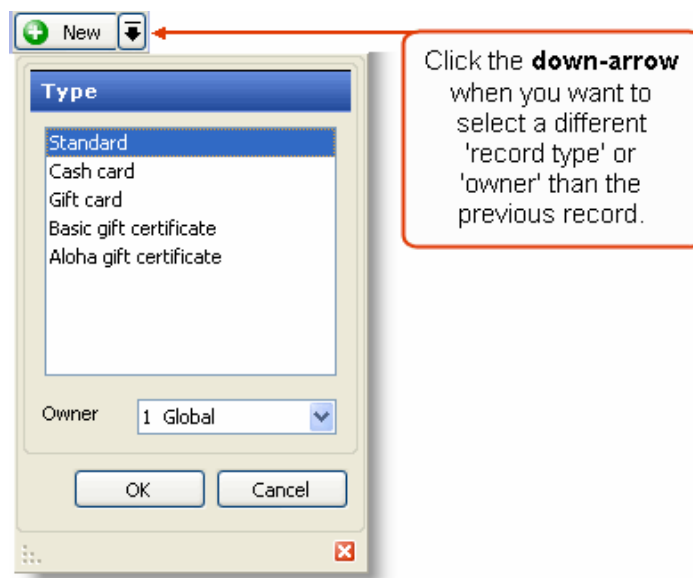


Figure 2 - 25 Example Owner and Type Dialog Box

- **Type** - Indicates the type of record you want to create. For example, if you create a menu item record, you can assign a record type of 'standard' to any food items you add to the system.
- **Owner** - Indicates who owns the record. The owner assigned to a record determines how the record is filtered, when data is distributed to a store, as well as who has the ability to view and edit the record. The choice of owners you can assign to a record is based on the owner assigned to your employee record. You assign an owner to the record when you click **New**, or the **down-arrow** next to 'New.' If you click **New**, the system defaults to the owner assigned to your

employee record; therefore, if you want to add a record with an owner different from the owner assigned to your employee record, click the **down-arrow** next to 'New,' to assign a different owner to the record. When you select a different owner, then click **New** for each subsequent item you add, the system assigns the same owner as the previous record.

4. If you want a different number assigned to the record, click the **ellipses button (...)**. The Number Assignment dialog box appears.
Select **one** of the following options and click **OK**.
 - **Next unassigned number** - Begins with the largest number currently in use and adds one (1), to determine the next available number.
 - **First unassigned number** - Begins with the lowest number (1), and displays the next, unassigned number.
 - **First unassigned number following** - Begins with the previous number, and displays the next, unassigned number.
 - **This number** - Enables you to type any valid, unassigned number of your choice. This option defaults to the same number as the 'First unassigned number following' option. If you type a number that is already in use, or reserved for a different item type, an error message appears.
 - **View already assigned numbers** - Enables you to view a list of numbers already in use. Use the **left** and **right arrows** to scroll through the list.
5. Complete the **remaining options** on the function screen. To learn more about an option, click the **left column** of the option and press **F1**, to display context-sensitive Help for the option.
6. Make sure you complete all '**required**' options for the function. If you do not complete a required option, or if you type invalid data for an option, a red error indicator appears next to the option.
7. When finished, click **Save**. If you do not click Save before you close the function screen, the system prompts you to save the record.

**Tip**

For Aloha Configuration Center users only: When you save a corporate- or global-level record, the database record is stored in the centralized database, at the Data Center, to ensure each applicable store receives the record.

Editing a record

Occasionally, you may need to modify settings for an existing record.

To edit an existing record:

1. Access the **Maintenance menu** from the Menu bar, and select the function for which you want to edit a record. The selected function screen appears.
2. Click the **drop-down arrow** next to the 'Record Selection' list, and select the record you want to edit. The options for the record appear on the function screen. You can use the columns in the 'Record Selection' list to group and sort records, for faster record selection.

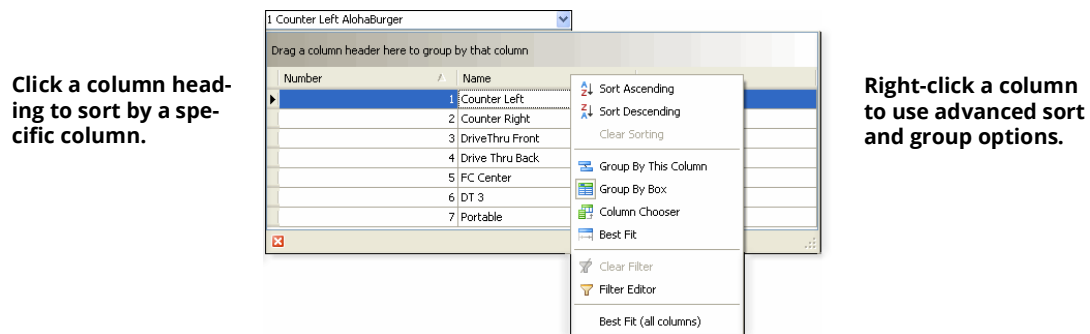


Figure 2 - 26 Right-click a Column to Display Advanced Sorting Options

3. Click **Edit**, or click the **option** you want to modify, and make changes, as necessary. To learn more about an option, click the **left column** of the option and press **F1**, to display context-sensitive Help for the option.
4. When finished, click **Save**. If you do not click Save before you close the function screen, the system prompts you to save the record.

Tip

For Aloha Configuration Center users only: When you save a corporate- or global-level record, the database record is stored in the centralized database, at the Data Center, to ensure each applicable store receives the record.

Copying a record

Occasionally, you may want to make a copy of an existing record so you do not have to create a new record from scratch. Use the copy function to duplicate a record and assign the record to a different owner, as needed.

To copy an existing record:

1. Access the **Maintenance menu** from the menu bar, and select the function for which you want to copy a record. The selected function screen appears.
2. Click the **drop-down arrow** next to the record selection list, and select the record you want to copy. The options for the record appear on the function screen. You can use the columns in the 'record selection' list to group and sort records, for faster record selection.

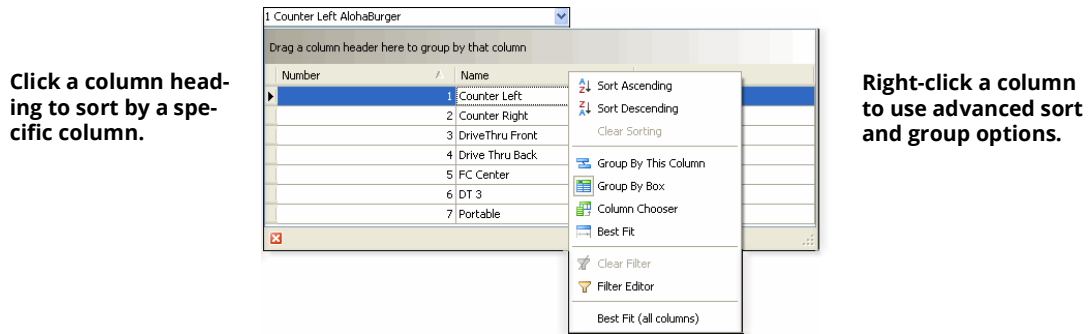


Figure 2 - 27 Right-click a Column to Display Advanced Sorting Options

3. Click the down-arrow next to **Copy**. The Owner list appears.

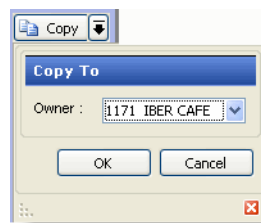


Figure 2 - 28 Copy Options Dialog Box

4. Select the **owner** you want to assign to the copied record.
5. Click **OK**.

The 'Copy options' dialog box appears with a summary of what is being copied and the owner to which the newly copied record belongs. The new default record number also appears.

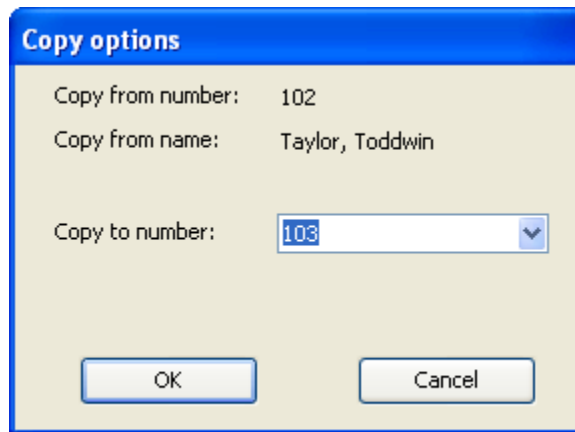


Figure 2 - 29 Copy Options Dialog Box

6. Keep the **default number** that appears, or type a new number to assign the copied record.
7. Modify **options** for the newly copied record, as necessary.
8. When finished, click **Save**. If you do not click Save before you close the function screen, the system prompts you to save the record.

 **Tip**

For Aloha Configuration Center users only: When you save a corporate- or global-level record, the database record is stored in the centralized database, at the Data Center, to ensure each applicable store receives the record.

Deleting a record

Occasionally, you may need to delete an existing record. When you attempt to delete a record, the system checks if the record is referenced by another record in the system. If it is, a Delete Failed message appears, and you must remove any references to other records, before you can successfully delete the current record.

For example, if you attempt to delete a burger item that is tied to a combo promotion, the system will not allow you to delete the burger item record until you access the combo promotion record, and then replace the burger with a different promotion component item.

To delete an existing record:

1. Access the **Maintenance menu** from the Menu bar, and select the function for which you want to delete a record. The selected function screen appears.
2. Click the **drop-down arrow** next to the 'Record Selection' list, and select the record you want to delete. You can use the columns in the 'Record Selection' list to group and sort records, for faster record selection.

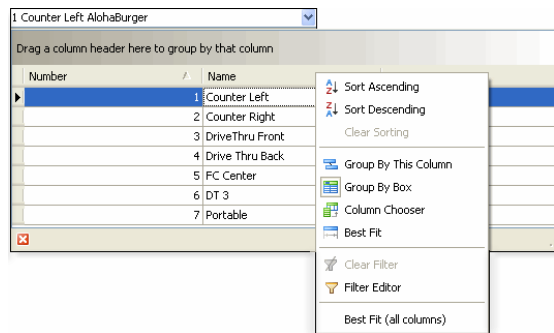


Figure 2 - 30 Right-click a Column to Display Advanced Sorting Options

3. Click **Delete**.
4. Perform **one** of the following:
If the record is not referenced by another record in the system, a confirmation message appears. Click **Yes** to confirm the deletion, and proceed to **step 5**.

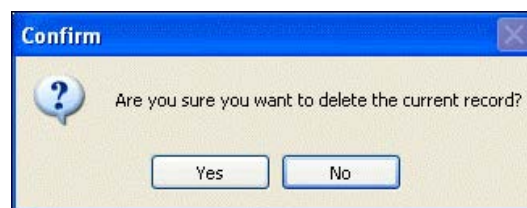


Figure 2 - 31 Confirm Deletion

If the record is referenced by other records in the database, a Delete Failed message appears, listing each record. Make note of each record number, then click **OK**, and then cancel the deletion. You must access each record and remove the relationship to the current record. After all references are removed, you can attempt to delete the record again.

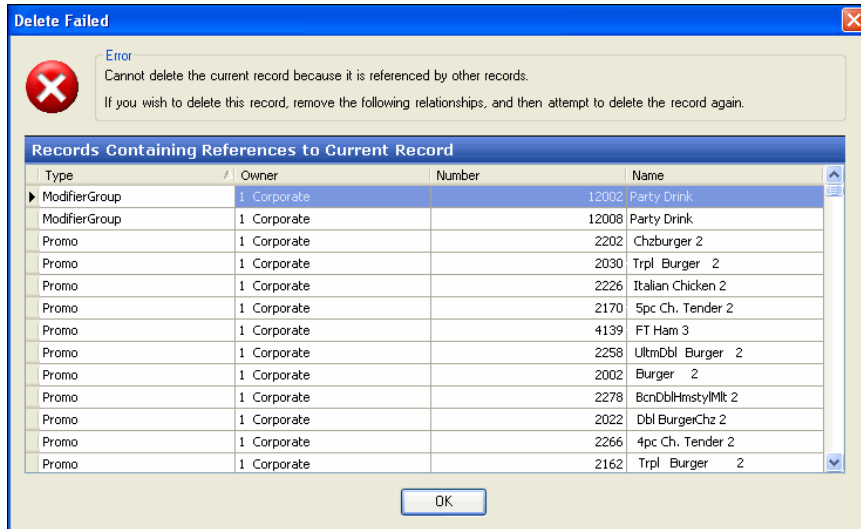


Figure 2 - 32 Delete Failed Message

- When finished, click **Save**. If you do not click Save before you close the function screen, the system prompts you to save the record.

Tip

For Aloha Configuration Center users only: When you delete a corporate- or global-level record, the database record is removed in the centralized database, at the Data Center, and no longer appears in the store database after data distribution occurs at the store.

Creating a version of a record

If using Aloha Configuration Center, you can create a version of a primary record for select Maintenance functions. You can assign the version to a store, or store group. To assign a version to a store group, you must have existing store groups set up in the system. You must be logged in as a corporate-level employee to create a version of a primary record.

To create a version of a record:

1. From the Configuration Center main menu, select the **maintenance function** for which you want to create a record version. The selected function screen appears.
2. Select the **primary record** for which you want to create a version, from the 'Record Selection' list. The selected record appears on the screen.
3. Click **Version**. The Version Assignment dialog box appears.
4. Select **one** of the following options:

Store — Allows you to assign the version to a specific store. Click the **drop-down list** to select a store. **Note:** For standard versioning only, once you select a store, you cannot assign another version of the same primary record to that store.

More than one store — Allows you to assign the version to a group of stores, for a designated hierarchy. The list of available store groups is filtered based on the hierarchy you select. Select a **hierarchy** from the drop-down list, and then select a **store group**. **Note:** Once selected, you cannot change the hierarchy, and all subsequent versions you create for the same primary record must use the same hierarchy.

1. Click **OK**. The system returns you to the function screen, and a version of the primary record appears. The record number is the same as the primary record. The Version Assignment option appears, which displays the store, or store group/hierarchy combination you selected.
2. Select a **Start date** to indicate the first day you want the version active at the store. **Note:** This option appears for scheduled versions only.
3. Select an **End date** to indicate the last day you want the version active at the store. **Note:** This option appears for scheduled versions only.
4. Make the necessary changes to any of the other settings for the version record. For help on an option, click the **option**, and then press **F1** to display field-level Help.
5. Click **Save**, when finished.

Consolidating multiple record versions

If a primary record has many different store versions, access one of the more representative store versions, and use the Version button on the Command panel to consolidate the version, and assign it to a specific hierarchy. When you select a hierarchy, the system determines the appropriate store group to assign, based on the store assignment of the current version. The store group to which the store belongs becomes the store group assignment for the consolidated version. When you consolidate the first version, the system automatically deletes any other version of the same primary record whose store is part of the selected store group. The new, consolidated version replaces the individual versions, at each store in the store group.



Note

You must have an existing hierarchy and store group structure defined, to use the version consolidation feature.



Note

When you consolidate one version of a primary record to a specific hierarchy, such as Region, you must continue using that hierarchy for all subsequent versions of that same record.

To consolidate multiple store versions of a record:

1. Access the **Maintenance menu** from the Menu bar, and select the function for which you want to consolidate a store version. The selected function screen appears.
2. Click the **drop-down arrow** next to the 'Record Selection' list, and select the store version you want to consolidate. The options for the version appear on the function screen. **Tip:** A version appears below its primary record. First locate the primary record, and then view the Version Assignment column, to find the desired store version below the primary record. You can also drag the Version Assignment column to view records by store.
3. Click **Version**. The Consolidate Versions dialog box appears.
4. Select the desired **hierarchy** from the drop-down list. When you select a hierarchy, the system determines the appropriate store group to assign, based on the store assignment of the current version.
5. Click **OK**. The system automatically deletes any other version of the same primary record whose store is also part of the designated store group. The new, consolidated version replaces the individual versions, at each store in the store group.
6. Click **Save**, when finished.

Locating a version of a record

After you create a version of a record, you can differentiate a version from its primary record by its version assignment. For example, if in a given function screen, you want to select a version of a record, click the Record Selection drop-down list to display existing records. A version of a primary

record appears below the primary record in the records list. Although the record numbers are the same, the versioned record has a different assignment in the Version Assignment column; usually the specific store, or store group, to which the version is assigned.

There are several ways to locate a version of a specific primary record.

To locate a version of a record:

1. Access the **Maintenance menu** from the Menu bar, and select the function for which you want to display a version. The selected function screen appears.
2. Click the **drop-down arrow** next to the 'Record Selection' list. A version appears below its primary record. First locate the **primary record**, and then view the **Version Assignment column**, to find the desired store version below the primary record.

OR

Drag the **Version Assignment column** to sort records by store assignment.

3. Click the **Plus sign (+)** next to a version assignment row, to expand and locate specific records for that version assignment.

Deleting a version of a primary record

On occasion, you may need to delete a version from the Aloha Configuration Center database. You cannot delete a primary record unless you first delete all versions of that record. Additionally, when you consolidate one version of a primary record to a specific hierarchy, you must continue using that hierarchy for all subsequent versions of that same record. If you need to change the hierarchy you currently have assigned to the versions, you have to first delete the versions, and then create a new version using the desired hierarchy assignment.

To delete a version of a primary record:

1. Access the **Maintenance menu** from the Menu bar, and select the function for which you want to delete a version. The selected function screen appears.
2. Click the **drop-down arrow** next to the 'Record Selection' list, and select the version you want to delete. The options for the version appear on the function screen. **Tip:** A version appears below its primary record. First locate the primary record, and then view the Version Assignment column, to find the desired version below the primary record. You can also drag the Version Assignment column to sort records by store assignment.
3. Click **Delete**. A confirmation message appears, asking if you are sure you want to delete the record.
4. If you are certain you want to delete the record, click **Yes**; otherwise, click **No**, and the system will return you to the current version screen.
5. Click **Save**, when finished.

Chapter 3: Maintenance menu overview

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About labor

Labor is the backbone of a restaurant. Without the people who sell, prepare, serve, and manage, restaurants would not stay in business very long. Restaurants must follow certain state and federal regulations, including keeping track of important labor-related data.

The Labor function group allows you to store pertinent employee information, such as job codes, labor performance measures, and termination reasons, as well as perform other tasks under the Labor umbrella. The Labor function group also enables you to set up and maintain system access and permission levels for employees on both the POS order entry terminals and the BOH system.

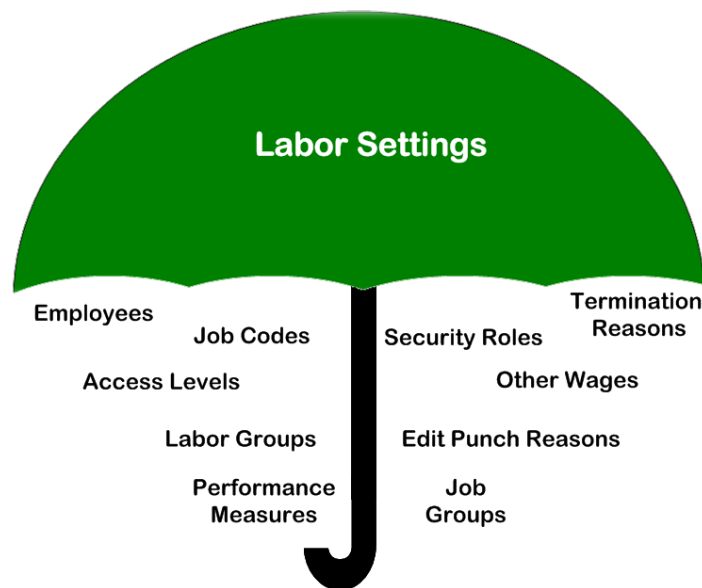


Figure 3 - 1 Functions Under the Labor Umbrella

Use the options in the Labor functions to:

- Enter and edit employee information.
- Assign, enter, and edit job codes and access levels.
- Establish labor groups.
- Define performance measures.
- Establish termination and edit punch reasons.
- Establish security roles and define the functions each security role can access.
- Define pay adjustments types for the administration of paid time off (PTO).
- Define job groups

Employees and ownership

Aloha Configuration Center requires you to assign an 'owner' to each database record you add to the system. An owner is a restaurant organization, franchisee, or individual store that owns a specific database record. You can create as many owners, as necessary, for your owner hierarchy.

Among other things, the owner affects security of database records. When you add an employee to the system, you are essentially creating a new database record; therefore, you must assign an owner to the employee. The owner you assign to the employee determines the data they can see when they log in to the system. The owner assigned to the employee also determines the choice of owners they can assign to any new records they create, as well as the choice of options available to select for a record, when they create a record in the system.



Note

The Security Roles set for an employee also play a factor in determining the data an employee can view or edit when they access Aloha Configuration Center.

An owner has an associated owner type, and there are three different types of owners: Global, Corporate, and Store. The owner type associated to an owner ultimately controls the owner hierarchy for an organization.

For example, if a store manager at store 101 logs in to Aloha Configuration Center and adds an employee to the system, the system automatically assigns store 101 as the owner of the employee record.

Employees that work at the corporate office rather than work in a physical restaurant are assigned an owner with an owner type of Corporate or Global because those owner types are at a higher level than the Store owner type. In this situation, the employee that adds the corporate employee to the system must have an owner whose owner type is also Corporate or Global.

Other labor-related records, such as job codes, have an owner whose owner type is Corporate or higher. It's easier for large restaurant chains to track employee labor data and maintain accurate labor cost reporting, if the corporate office maintains consistent job codes at all stores.

Employee information

The Employee function allows you to add and maintain employee data for each store, such as the employee birth date, social security number, employment status, and hire date information. Use the Employee function to manage employees that work at one or more stores, as well as employees that transfer between stores.

The Employee function also enables you to indicate if and how an employee will access the POS order entry system, as well as the BOH system. The 'System Access' option on the Employee function screen determines if an employee can log in to the Aloha Configuration Center POS terminal, the BOH system, or both.

Certain fields in the Employee function are restricted, based on the security roles assigned to an employee, to prevent disclosure of private, personal information. For example, a security role for an employee might restrict access rights to the social security number, address, pay rate, and other personal information of all employees in the system.

Job codes and access levels

Job codes provide a job description for the particular role an employee performs for the job under which they are clocked in. They control whether an employee will enter orders, the parameters under which they can take breaks, whether they can operate a cash drawer, and more.

POS Access Levels work in conjunction with job codes. Use access levels to define if an employee can perform specific functions without having to view and respond to the Manager Approval (JIT) screen.

It is common practice to create access levels that correspond with a certain type of job code. For example, if your restaurant uses a Cashier job code, you can create a Cashier access level that indicates the rights and privileges an employee has when logged in as a cashier.

You can also mix and match access levels with different job codes, as necessary, when you assign a job code and access level to an employee record. For example, a trusted cashier might need to perform manager functions when the manager is not present. In this situation, you can assign a Cashier job code to the employee, but instead of assigning a Cashier access level, you assign a Manager access level. This way, the cashier can log in as a cashier, and also perform manager related functions, such as approving voids, assigning drawers, and other tasks, as needed.

Labor groups

The Labor Groups function enables you to combine sales/non-sales categories with job codes to track labor costs associated with different areas in your restaurant. For example, to keep track of Front of House and Back of House labor, create a FOH labor group that includes cashiers, servers, bartenders, hostesses, and other FOH job codes. Create a BOH labor group that includes cooks, busboys, dishwashers, and other BOH job codes. Later, you can access various reports, such as the Restaurant Sales, Flash, and Daily Summary reports, to view labor costs for each labor group, as a percentage comparison to specific sales/non-sales categories. You can select one or more job codes and categories for each labor group record.

Performance measures

The Performance Measures function enables you to keep track of sales data by cashier, based on specific sales criteria, which provides valuable information when you want to examine targeted sales performance for a cashier. You can select one calculation method for each performance measurement record you add to Quick Service.

If your establishment frequently holds contests to upsell a certain group, or category of menu items, such as Salads, use the Performance Measures function to set a profile for a 'Salads' sales target. View the FOH Server Sales report from any POS terminal to obtain salad sales information for a cashier. Additionally, the performance measures detail prints on the Server Checkout report, so an employee can also keep track of their own sales performance.

The Performance Measures function is also useful for sales comparison tracking. For example, if you set up a 'Sales To Sales' performance measure to compare sales for 'Desserts' and 'Burgers,' you might determine an employee is great at upselling burger meals, but may need to improve their suggestive selling techniques for desserts. If you set up a 'Sales To Sales' performance measure to keep track of 'Desserts' and 'Alcoholic Beverages' sales, you might determine an employee is great at upselling desserts, but may need to improve their sales performance for alcoholic beverages.

Termination and edit punch reasons

Use the Termination Reasons function to document why an employee left the company. You can establish up to 50 termination reasons from which to choose when you update the employee record.

Use the Edit Punch Reasons function to document why you had to modify the clock in and clock out times for an employee. The clock in and clock out times can be shift or break related. For example, if you commonly modify the clock in time for an employee who forgets to clock in at the start of their shift, you can define an edit punch reason stating 'Employee forgot to clock in for Shift.' Select this reason, when you edit the punch, and it appears next to the corresponding punch on the Edited Punches report.

Pay adjustments

Use the Pay Adjustments function (formally called 'Other Wages') to manually enter and edit PTO in the form of sick, holiday, or vacation time for your employees. Calculate the PTO pay in hours, dollar

amounts, or both. In addition, you set parameters related to meal and rest period breaks, split shift premiums, and other system-generated adjustments. You can add Pay Adjustments from either the FOH or the BOH, with appropriate access.

Job groups

Use the Job Groups function to bundle multiple job codes into a single category for generating and analyzing various labor reports. Job Groups enable you to assign specific menus or tipshares to designated job groups, through the function.

About pricing

Developing an effective pricing strategy for your restaurant organization is undoubtedly one of the most important factors to a successful restaurant business. Quick Service enables you to implement your pricing strategy at a single store, or across multiple stores within your organization, in an easy and flexible manner.

In a multi-store environment, there is often a need for the corporate office to maintain control of all item pricing for its stores; however, exceptions do arise that make it necessary for stores to also have the ability to maintain prices, when needed. Quick Service uses a combination of pricing methods, pricing hierarchy rules, and pricing features to help the corporate office manage pricing for all its stores; yet, delegate pricing control to one or more stores, when necessary.

You must understand the pricing hierarchy for the different pricing methods, to correctly charge for an item. For example, when pricing a modifier, you choose from 'Item price,' 'Button price,' and 'Price level,' with 'Button price' overriding all other pricing methods. It is not possible to override the price of a modifier configured to use 'Button price,' even when using one of the pricing methods that are higher in the hierarchy. You can only override the price of a modifier if you choose 'Item price' or 'Price level' as the pricing method for the modifier.

This section discusses the available pricing methods and the order in which they fall in the pricing hierarchy, from lowest to highest, with Quantity Pricing overriding all other pricing methods:

- [Item pricing](#)
- [Price Level pricing](#)
- [Price Change pricing](#)
- [Button pricing](#)
- [Fixed Item pricing \(TS only\)](#)
- [Quantity pricing](#)
- [Ask for Price pricing](#)

SCENARIO: You have an item called "Cheese" and it has a unit price of \$0.50. You add this item to a modifier group, choose 'Button price' as the pricing method, and establish the price at \$0.55. You also create a Price Change, include the modifier item, and enter a price of \$0.60. When a guest orders an item for which you add the "cheese" modifier item, such as a chicken sandwich, the guest is only charged an additional \$0.55 for the cheese, because the button price for the modifier takes precedence over all other pricing options for that modifier; however, if you select 'Item price' as the pricing method for the modifier, the guest is charged an additional \$0.60 for the cheese. Price Change pricing is higher in the hierarchy than Modifier pricing that uses 'Item price' or Price level' pricing.

Another method for pricing an item is to use the Ask for Price pricing method. Use this method to sell a guest an item that is not set up in your system as a separate item, such as when a guest asks to purchase some tomato slices or a container of sauce. Refer to [Ask for Price pricing](#).

Item pricing

Item pricing is the simplest method of pricing. Sales are generated straight from the price designated in the Items function tab.

Price Level pricing

Use Price Level pricing for groups of items that you sell for the same price. For example, if all medium drinks are \$1.15, create a \$1.15 price level and attach it to all medium drinks. You can change the price of all medium drinks by changing the price of the price level. To use this method, create the price level, and then assign the price level to the item.

Price Change pricing

Use the Price Change pricing method to activate one or more price changes at a specific time. The price change can include new pricing for single items, price levels, and promotions. You can use price changes to change prices on your entire menu, or change a smaller set of items for happy hour or other periods of the business day. To use this method, create the price change, then use the Activation schedule and Event schedule functions to activate the price change at a specific time. To use this method, create the price change, and then configure an event to activate it.

SCENARIO: You offer sandwich promotions at your site for \$6.50, and every Wednesday you offer the Turkey Sandwich Combo for a special price of \$5.00. Create a price change by promo for the Turkey Sandwich Combo promotion, add the Activate Price Change event to an Event Schedule, and use the Activation Schedule function to schedule it so that it occurs weekly, on Wednesday only, during the hours you are open.

Button pricing

SCENARIO: Use the Button pricing method to establish pricing on items available as modifiers and on submenus (TS only). Button pricing overrides both the Item and Price Level pricing methods. It is very common to manage pricing through buttons on submenus.

Fixed Item pricing (TS only)

Use the Fixed Item pricing method to price items for which the price changes often, such as market specials. For example, you may price the fish of the day depending on the market value, but the fish item is priced differently on submenus and modifier groups. Rather than changing the price everywhere the item appears, use fixed item pricing to globally change the price.

Quantity pricing

Use Quantity pricing for items sold in bulk or by the usage, such as ounces, liters, and pounds. Also use this for counting heads in a banquet environment. When you enter an order for an item that uses Quantity pricing, an additional FOH screen appears for entering the amount.

Ask for Price pricing

In some cases you may need to charge a customer for products that do not have an item configured in the database. This type of item is also sometimes referred to as an “open item.” For example, if a customer wishes to purchase some tomato slices or a container of sauce that is not on the menu, use an “open item” to add this sale to the check. You typically add several “open items” to your database, such as Open Item - Food, Open Item - Alcohol, to ensure taxes and reporting are accurate.



Reference

Refer to the [Quick Service Manager Guide](#) or the [Table Service Manager Guide](#) for step-by-step procedures on how to configure the above pricing methods.

About taxes

Nearly all food, drink, and retail items sold by eating establishments are subject to tax. The location of a restaurant determines its proper tax jurisdiction, or area of tax authority, to which the restaurant belongs. In addition to federal taxation laws, a state, county, city, or other territorial district might have their own tax rates and guidelines you must follow, depending on the location of your establishment.

Quick Service enables you to manage multiple tax structures, to accommodate the taxation model of your business. Use Quick Service to calculate tax rates, manage taxes under varying conditions, maintain tax tables with breakpoints, implement goods and services taxes (GST), or apply any other tax or surcharge that your tax jurisdiction requires.

If you are a multi-store organization, you also use Quick Service to manage different tax rates for each of your restaurants, based on their individual location and tax jurisdiction, and to make tax rate changes for a store or group of stores, as necessary.



Caution

The information contained here regarding taxes is intended solely as a guide for use with Aloha software. Consult state and federal regulations regarding the collecting and reporting of all taxes by your establishment.

Tax types

Each item in the Aloha Configuration Center database requires a primary tax. Some items require only one tax, while other items may use multiple taxes. There are several types of taxes to choose from, when you configure taxes for your organization. The different types of taxes you can use in Aloha Configuration Center are described in the following table:

Tax Type	Description
Primary Tax	The primary tax indicates the principle tax used to calculate taxes for items sold at a restaurant. You must assign every item in the Aloha Configuration Center database a primary tax. Even if the item is not taxed, you would still apply a tax rate of zero percent (0.00%). Depending on your tax jurisdiction, you can use a flat percentage rate or a tax table, to calculate the primary tax.
Secondary Tax	The secondary tax indicates a jurisdictional tax that works in conjunction with the primary tax. Some establishments must apply two taxes, such as a state and city tax, to a sale. In this situation, you assign both a primary and secondary tax to each applicable item in the Aloha Configuration Center database. Depending on your tax jurisdiction, you can use a flat percentage rate or a tax table, to calculate the secondary tax.
Vendor Tax	The vendor tax indicates a tax some product suppliers assess to items purchased by the restaurant. Some establishments pass the vendor tax on to customers. To recoup the vendor tax, you must add a vendor tax to each applicable item in the Aloha Configuration Center database. You can use the vendor tax as a primary tax, or as an additional tax placed on an item.
Goods and Services (GST) Tax	The GST tax indicates a multi-level value-added tax used in International environments. This tax charges a certain percentage on the sale of all goods and services; however, you can exempt certain items from the GST tax, as allowed. You apply the GST tax at the item level rather than the guest check level, and after other taxes are applied to the guest check. For example, if the guest check subtotal for a single item, such as a sandwich, is \$5 and the primary tax applied is 5%, the new subtotal is \$5.25. If a GST tax of 3% is in effect, the system calculates the tax against the new subtotal (\$5.25), which brings the guest check total to \$5.40.

Tax methods

When you decide on the tax type you need to assign, you must also think about the method in which the Aloha POS will calculate the tax. This concept is known as ‘tax methods.’ Tax methods determine the manner in which a tax type calculates tax for an item and also influences how taxes appear on guest checks and sales reports. When you create a tax in Aloha Configuration Center, you specify the tax method along with the tax type, so the system can determine how to calculate the amount of the tax in the Aloha POS. There are three tax methods in Aloha Configuration Center: exclusive, inclusive, and vendor. The different types of tax methods you can use in Aloha Configuration Center are described in the following table:

Tax Calculation Method	Description
<p>Exclusive Tax Method</p>	<p>The exclusive tax method calculates a tax as an amount added to the price of an item. When prepared food and drinks are sold in restaurants, the sales tax is normally stated separately and added to the total bill. Most restaurant menus display menu item prices exclusive of the tax. When the cashier enters an order, the system applies the tax to each applicable item, and the tax appears on the guest check as a separate line item. Primary taxes can be exclusive; however, secondary taxes must be exclusive. Tax tables, which are used instead of flat percentage rates in some tax jurisdictions, use the exclusive tax method only. The exclusive tax method uses the following calculation: $(PRICE \times RATE = TAX)$</p> <p>For example: $\\$10.00 \times 10\% = \\1.00 Total sale = \$11.00 Price = \$10.00 Tax = \$1.00</p>
<p>Inclusive Tax Method</p>	<p>The inclusive tax method calculates a tax as an amount included with the item price. Inclusive taxes are contained in the stated price of an item. When a customer orders a drink in the bar area of a restaurant, sales tax is often included in the price of the drink, as a convenience to both the restaurant and the customer. Primary taxes can be inclusive; however, secondary taxes are never inclusive. The inclusive tax method uses the following calculation: $(PRICE \times RATE) / (1 + RATE) = TAX$</p> <p>For example: $(\\$10.00 \times 10\%) / (1 + 10\%) = .90$ Total sale = \$10.00 Price = \$9.10 Tax = .90</p>

Tax Calculation Method	Description
Vendor Tax Method	<p>The Vendor tax method is also a type of inclusive tax method, but uses a special tax calculation for use with the vendor tax type only. The system decreases the price by the amount of the vendor tax, thus taxing the vendor, not the customer. The vendor tax method uses the following calculation: (PRICE x RATE = TAX)</p> <p>For example:</p> <p>$\\$10.00 \times 5\% = .50$</p> <p>Total sale = \$10.00</p> <p>Price = \$9.50</p> <p>Tax = .50</p>

Tax groups

Except for the GST tax, all items in the Aloha Configuration Center database have taxes assigned at the item level. You must assign, at a minimum, a primary tax to each item in the database.

If your restaurant uses multiple tax types for each item, such as a primary and secondary tax, it can be a cumbersome task to assign multiple taxes to each item. This is especially true if you are responsible for maintaining taxes for a large enterprise database, with multiple stores.

To help make the tax management process easier to manage, we implemented a Tax Group function in Aloha Configuration Center that enables you to assign taxes, to items in your database, in a more efficient and faster manner.

The Tax Group function enables you to assign one or more taxes to a single tax group, then assign the tax group to each applicable item in the database. Tax groups make the tax assignment process easier because you do not have to worry about assigning the same set of taxes to each item; instead, you set up the tax group once, then apply it to each item, as needed.

For example, if you create a 'food tax' for your Aloha Configuration Center database, you also need to create a tax group in the Tax Group function, and assign the 'food tax' to that group. Later, when you want to assign a 'food tax' to an item in the database, you assign the tax group that contains the appropriate food tax to the item.

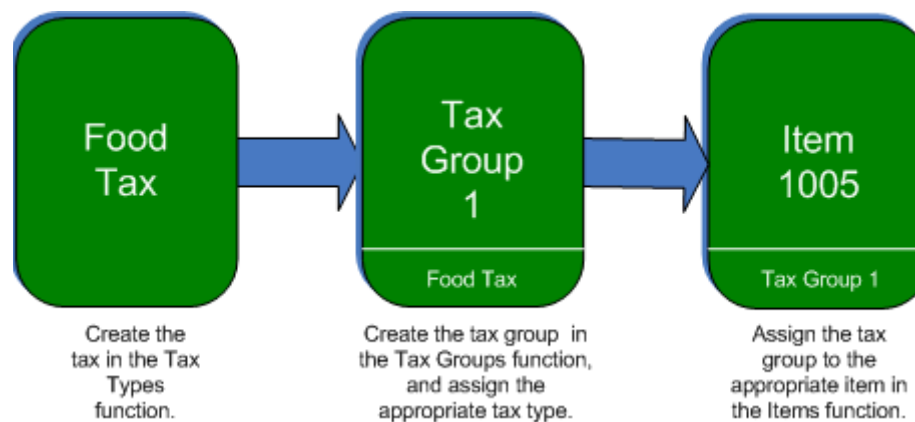


Figure 3 - 2 Tax Management Process

It is common practice to use different combinations of taxes for different items in your database. In this situation, you create a separate tax group for each combination of tax types you plan to use. For example, create a 'PS Tax Group' and assign the primary and secondary taxes to that group. Later, in

the Items function, assign the 'PS Tax Group' tax group to those items in the Aloha Configuration Center database that require the primary and secondary taxes.

Tip

For items that do not require a tax, you still need to assign a zero percent tax rate; therefore, we recommend you create a 'No Tax' tax type in the Tax Type function, then create a 'No Tax' tax group in the Tax Group function, and assign to it, the 'No Tax' tax type. Later, when you need to assign a zero percent tax rate to an item, you assign the 'No Tax' tax group.

Flex tax rules

Flex tax rules help you manage primary and secondary taxes based on certain conditions, or parameters. A flex tax rule is not a tax type, it is a rule you set up that enables the system to determine the appropriate primary or secondary tax type to apply to an item.

Note

Flex taxes use existing primary or secondary taxes only.

You can set up a variety of flex tax rules. For example, you can create a rule to apply a specific primary tax to an item if the quantity sold is less than five. You also have the ability to create rules based on the subtotal of the guest check, the category of an item, and the quantity of items ordered from a category. Additionally, you can chain multiple flex tax rules for use at the same time. When multiple flex tax rules are in effect, the system checks the parameters of each rule in effect, before it determines the appropriate primary or secondary tax to apply.

Surcharges

A surcharge is an additional charge that occurs when specific items are sold. Surcharges are used primarily in North Carolina tax jurisdictions where each alcoholic drink sold has an assessed surcharge. It is up to the restaurant to decide if they will pass the surcharge on to customers, or show it as a business expense. In Aloha Configuration Center, the options to assess the charge to the customer or not, are known as 'collected' or 'uncollected' surcharges. If the restaurant assesses the surcharge to customers, the charge appears on the guest check as a separate line item. If the restaurant does not assess the surcharge to customers, the charge appears as an expense to the restaurant, and is deducted for the Net Sales calculation.

You can apply an exclusive tax to a surcharge. In this situation, the tax is applied to the surcharge only, not to the item to which the surcharge is applied. The exclusive tax applied to the surcharge appears on the tax line of the guest check.

Note

You cannot apply an inclusive tax to a surcharge.

Tax tables and breakpoints

Some tax jurisdictions require establishments to enter the tax rate as a table instead of using flat percentage rates to calculate sales tax. If you are in an area that uses a table for tax calculation, obtain a local tax chart to determine the tax breaks for your area, and then set up the appropriate tax and tax breakpoints in Aloha Configuration Center.

The Tax Type function enables you to set up tax table breakpoints when you create a new tax. The amount of sale at which point the tax value changes, is known as a tax breakpoint. Tax breakpoints allow the tax value for a range of sale amounts to increase in stages. For example, an amount of sale that ranges between .10 and .40 cents might warrant a sales tax of one cent; however, an amount of sale between .41 and .80 cents might warrant a sales tax of 2 cents, depending on the tax table in your locale.

Tax rate versioning

When you set up an Aloha Configuration Center database, you generally start with default tax types and default tax groups, which are sent to all your stores. These original, default records are called 'primary' records. For some organizations, the actual tax rate applied to the primary record may need to be different for each store, depending on the location and tax jurisdiction of the stores. In this situation, Aloha Configuration Center enables you to create variations of a primary record, for an individual store, or group of stores within your organization. The process of creating these variations is called 'Versioning.'

A version of a tax type record is essentially a composite of the primary record, except for the different tax rate assigned to the version. The version is not a standalone record; it shares the same number as the primary tax record, but overrides the primary tax rate, based on the start and end dates of the version.

Use 'Versioning' when you need a store to have a different tax rate, but you do not need an entirely new tax type or tax group, to accommodate the different rate.

As discussed earlier, a tax rate is assigned to an item through a tax group. For example, Tax Group 2 contains a 'food tax' with an assigned rate of 7.25 percent. When you assign Tax Group 2 to a Sandwich item, the 7.25 percent tax rate is applied to the item when sold at a store; however, if you create a version of the 'food tax,' assign it a rate of 8.25 percent, and then assign the version to a specific store, the new rate of 8.25 percent is applied when the Sandwich item is sold at that specific store.

Notice that neither the tax group assigned to the Sandwich item, nor the tax group assigned to the version changed; they remain the same as the original record. Only the tax rate changes.

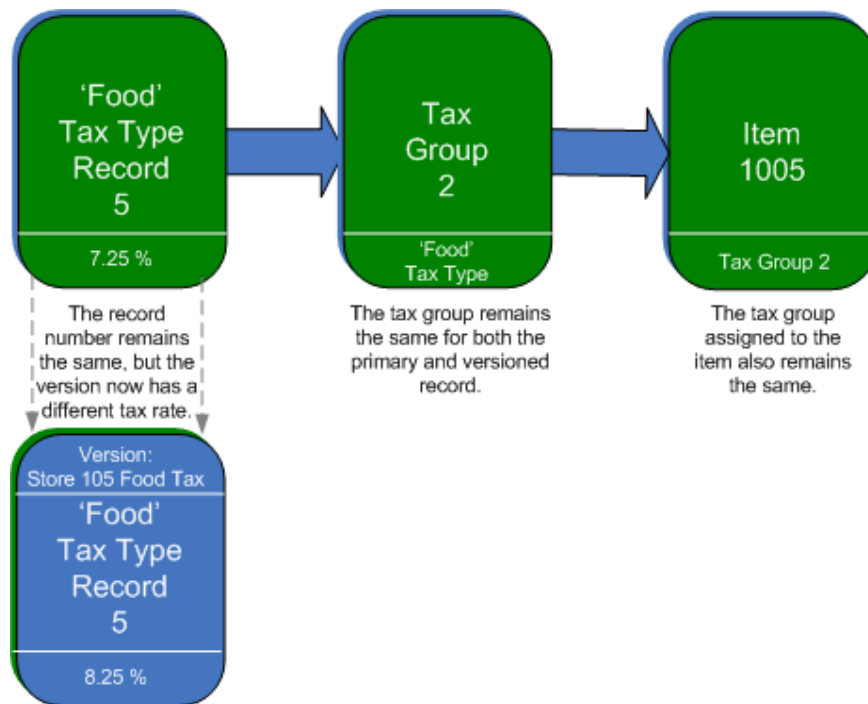


Figure 3 - 3 Tax Type Versioning Process

Based on the above example, if you have five stores, and each store requires a different tax rate for their 'food tax,' you would create five versions of the primary record. Additionally, you would assign a new tax rate to each version, and then assign each version to the appropriate store, or group of stores.

Note

You cannot use versioning to change the type of tax (i.e., primary, secondary, vendor, and GST). Use versioning to assign or change tax rates only.

Tax rate changes

When you create a version of a tax record, you do not have to assign an end date to the version. If you do not assign an end date, the version remains active indefinitely. Since tax rates within a tax jurisdiction periodically change, you must be able to change the tax rate for one or more stores, as necessary.

Aloha Configuration Center enables you to perform tax rate changes for one or more stores, with the option to change the tax rate temporarily, or change the tax rate to a new rate indefinitely.

Each time you need to change a tax rate, you create a new version of the primary record, and assign it to the store, or group of stores, requiring the tax change. So, if a tax jurisdiction plans to increase their tax rate at the beginning of the next year, you can proactively create a version of the new tax rate for a store or store group, and pre-assign the start date so the tax record does not take effect until the first day of the new year.

For example, if the 'food tax' rate for California plans to increase from 7.32 to 7.67 on 01/01/2008, you can select an end date of 12/31/2007 for the current version of the 'food tax' record assigned to California stores. Then, create another version of the 'food tax' record with a tax rate of 7.67, assign the record to your California stores, and select a start date of 01/01/2008. After EOD processes on 12/31/2007, the version of the 'food tax' record with a start date of 01/01/2008 goes into effect at all your California restaurants.

Another example is, you might have in effect at a store, a version of a record with no expiration date; however, due to new tax jurisdiction requirements, you must now assign a new tax rate to the store on a quarterly basis.

In this situation, create a new version of the primary record, and assign a new tax rate. Indicate the 'start' and 'end' dates for the version, and assign the record to the store, or group of stores, that requires the temporary tax rate. If you know what the tax rate will be for the next quarter, you can set up another tax rate change for a future time period. When you set up tax rate changes for a future time period, the rate change will not become active at a store, or group of stores, until the effective date.

When a version of a tax record expires, Aloha Configuration Center reverts back to the primary record, unless a new store version, or another active store version, exists to replace the expired version.

Tax-related events

Use the Events Schedule function to change certain tax-related activities in a store. Two tax-related events are available for use: Reroute Tax and Reroute Secondary Taxes by Revenue Center.

The Reroute Tax event enables you to redirect from one tax type to another, such as from a primary exclusive liquor tax to a primary inclusive liquor tax. You can select the tax type associated with a certain tax record, then redirect from one tax type to another tax type.

The Reroute Secondary Taxes by Revenue Center event enables you to redirect the taxes controlled by revenue centers. You can select the revenue center associated with a certain tax, then redirect the secondary tax from one tax type to another tax type.

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This section provides a brief overview for each function on the Maintenance menu, as well as field definitions for each option available within a function. The Table of Contents lists each function in alphabetical order; however, the list below flows in the order in which the functions appear on the Maintenance menu.

If you are viewing this document in PDF format, click each hyperlink to view the field definitions.

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- Store (includes Store Settings)
- Additional Features (Corporate Administration)
- Installed Products (Must be logged in as a global user.)
- Default Favorites
- Fiscal Calendar Settings
- Report Settings
- Custom FOH Reports

System Settings

- Activation Schedule
- Event Schedule
- Debug Event
- Order Mode
- Order Entry Queue
- Revenue Center
- Day Part
- Concept
- Void Reasons
- No Sale Reasons
- Deposit Reasons
- Petty Cash Account
- Routing Level
- Volume Level
- Media Files
- Skins
- Tags
- Occasions
- Occasion Categories
- PAR Templates
- Kitchen Routing Levels
- Integrations
- Filter Text
- Concepts

Hardware

- Terminals
- Cash Drawers
- Printers
- Printer Groups
- Labels
- Video Groups
- Video Queues
- Video Controllers

- Display Boards
- Cash Cards
- Drink Dispensers
- Scales
- Tares
- Print Designer
- Fiscal Devices
- Payment Device
 - Payment Devices
 - Payment Device Settings

Messaging

- Main Screen Message
- Guest Check Message
- Barcode Messages
- Clock In Message
- Survey
- Interactive Messages
- Break Reminder Messages
- Waive Break Messages
- Movie
- Custom EDC Response Messages

Guest Experience

- Loyalty Providers
- Campaign Rulebook

Quick Count

- Tracking Item

Alert

- Alert Settings

Activation Schedule

Select **Maintenance > System Settings > Activation Schedule** to access this function.

The Activation Schedule function enables you to control when events automatically recur at a store. Events allow you to control a wide range of things, such as the menu that appears for a specific job group, printer reroutes, messages that appear, tip-share percentages, promotions, price changes, and more. When you configure an event, you stipulate the activation schedule for the event to use. You can set the activation schedule to run daily at start-of-day, on a specific date, such as Labor Day at start-of-day, or weekly starting at 5:00 p.m. every Thursday.

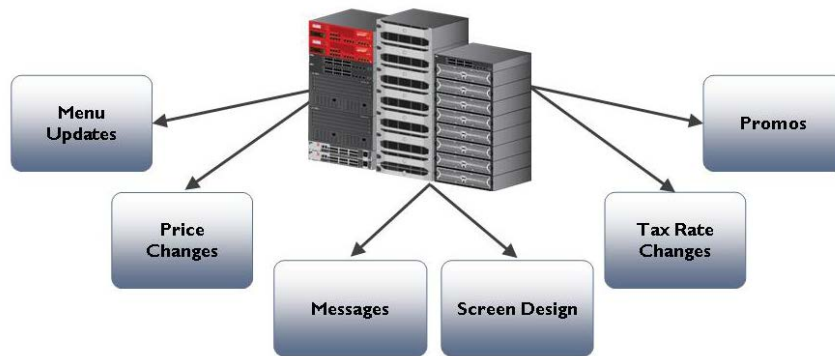


Figure 4 - 1 Functions Affected by Activation Schedules

The Aloha POS system provides a default 'Daily' activation schedule called Always that becomes active immediately after the End-of-Day occurs. Any event you configure to use the default schedule remains active until the End-of-Day occurs and a new business day starts, unless you also add an event to disable the function prior to the End-of-Day.

Analyze your existing activation schedules to determine if a schedule with the desired recurrence interval and start time already exists for activating the event. If yes, use that schedule to activate the event; if not, create a new activation schedule to meet your needs. Then add the event to an event schedule, assign an activation schedule to the event, and, if needed, further stipulate when the event is active by entering a start and end date for the event.

Activation Schedule types

Several standard activation schedule types allow you to determine when a schedule is in effect. Click the New drop-down arrow to select an activation schedule type.

Daily indicates the schedule is in effect each day, seven days a week. For example, if you want a promotion to be in effect at all times at a restaurant, use the 'Daily' schedule type.

Weekly indicates the schedule is in effect on one or more specific days of each week. For example, if you want a promotion to be in effect on Mondays, Wednesdays, and Fridays of each week, use the 'Weekly' schedule type so you can designate the specific days of the week. Weekly schedules override daily schedules.

Monthly indicates the schedule is in effect on a specific day of each month. For example, if you want a promotion to be in effect on the first day of each month, use the 'Monthly' schedule type. Monthly schedules override weekly and daily schedules.

Specific date indicates the schedule takes effect on a specific calendar date. For example, if you want a beverage promotion to be in effect on April 15th, use the 'Specific Date' schedule type so you can designate the exact date. Specific date schedules override all other timed activation schedules. Type the **date** as 'MM/DD/YYYY,' or click the **down-arrow** and select the date from the calendar.



Tip

The Aloha POS system stores activation schedules in Events.cfg in the Aloha\Data subdirectory. The POS system reads from Events.cfg, and activates a schedule, beginning with daily schedules first, followed by any weekly, monthly, and date-specific schedules. Because they override all other schedule types, the date-specific schedules are read last.

Activation Schedule tab

Use the Activation Schedule tab to define basic information about the schedule, including number and name, as well as the type of schedule and other details.

Group bar: Identification

Name — Identifies the activation schedule.

Group bar: Time

Start of day — Indicates you want the schedule to activate immediately after EOD processes. ***Clear this option to specify an exact time, other than start of day, to activate the schedule.***

Specific start time — Indicates the exact time, other than start of day, you want the schedule to activate at a store. Enter the time in hours and minutes using a 48-hour clock. Valid entries range from 00:00 to 47:59. **Required Options:** You must clear 'Start of day' to enable this option.

When using a 48-hour clock, the date of business extends to encompass schedules that span two actual dates of business. For example, assume the date of business is 01/01/2006. After midnight, the date of business remains 01/01/2006, but the system date becomes 01/02/2006. The date of business remains 01/01/2006 until the End-of-Day procedure runs, which is typically 4:00 a.m. the following day. To ensure the daily information is posted to the correct date of business (01/01/2006), set the EOD Event to run at 28:00. To specify a time after midnight, you add 24 to the desired time; therefore, to specify 4:00 a.m., add 24 to 4:00, which is 28:00. When the EOD completes successfully, the date of business changes and once again coincides with the system date.

The date of business in the FOH is the operational date in the Aloha system. If the date of business in the FOH and the BOH are not the same, scheduled database records do not activate correctly.

Group bar: Options

Sunday — Indicates you want the schedule active at the store on a Sunday. **Required Options:** You must select the 'Weekly' schedule type to enable this option.

Monday — Indicates you want the schedule active at the store on a Monday. **Required Options:** You must select the 'Weekly' schedule type to enable this option.

Tuesday — Indicates you want the schedule active at the store on a Tuesday. **Required Options:** You must select the 'Weekly' schedule type to enable this option.

Wednesday — Indicates you want the schedule active at the store on a Wednesday. **Required Options:** You must select the 'Weekly' schedule type to enable this option.

Thursday — Indicates you want the schedule active at the store on a Thursday. **Required Options:** You must select the 'Weekly' schedule type to enable this option.

Friday — Indicates you want the schedule active at the store on a Friday. **Required Options:** You must select the 'Weekly' schedule type to enable this option.

Saturday — Indicates you want the schedule active at the store on a Saturday. **Required Options:** You must select the 'Weekly' schedule type to enable this option.

Day of the month — Indicates the day of the month you want the schedule active at the store. **Required Options:** You must select the 'Monthly' schedule type to enable this option.

Specific date — Indicates the exact date you want the schedule active at the store. **Required Options:** You must select the 'Specific Date' schedule type to enable this option.

Additional Features (Corporate Administration)

Select **Maintenance > Business > Additional Features (Corporate Administration, if using CFC)** to access this function.

At the time of installation, the system creates a default record named 'Corporate' with the number '1.' Any changes made in Additional Features affect that default record.

Corporate Owner tab

Use the Corporate Owner tab to define basic selections for the options on the Corporate Owner tab, such as number and name, as well as to indicate the options to appear in the application.

Name — Identifies the store. Type a maximum of 50 characters.

Group bar: Options to display



Note

Changes do not appear in real time. You must log out of Aloha Manager and log back in to view any changes.

Display Aloha QuickService settings — Exposes Quick Service-related options in the system.

Related Options: This is equivalent to the Fastfood marker file used to force Quick Service options.

Display Aloha TableService settings — Exposes Table Service-related options in the system.

Display cash card — Exposes all options that relate to cash cards.

Display Campus Card — Exposes all options that relate to Campus cards.

Display gift card — Exposes all options that relate to gift cards.

Display basic gift certificates — Exposes all options that relate to the Basic Gift Certificates feature, which is an internal Aloha POS feature used to track paper gift certificates. The Basic Gift Certificates feature does not require a security key license.

Display quick count — Exposes all options that relate to the Quick Count feature.



Reference

Refer to the [Quick Count Feature Focus Guide - HKS316](#) for further information.

Display VideoMX — Exposes all options that relate to interfacing with third-party kitchen display systems.

Display property management — Exposes all options that relate to interfacing with a property management system (PMS).

Display survey — Exposes all options that relate to the Survey feature.



Reference

Refer to the [Customer Survey Feature Focus Guide - HKS304](#) for more information.

Display token distribution — Exposes all options that relate to the Token Distribution feature.

Display Aloha Loyalty — Exposes all options that relate to Aloha Loyalty.

Display gold points — Exposes all options that relate to the Gold Points loyalty program.

Display drink dispenser — Exposes all options that relate to the Drink Dispenser feature.



Reference

Refer to the [Drink Dispensers Feature Focus Guide - HKS1677](#) for more information.

Display scales — Exposes all options that relate to the Scales feature.



Reference

Refer to the [Scales Feature Focus Guide - HKS1480](#) for more information.

Display club membership — Exposes all options that relate to the Club Membership feature.

Display delivery — Exposes all options that relate to interfacing with the Aloha Delivery and Delivery/Frequent Buyer programs. We recommend using the newer product Aloha Takeout.

Display credit card — Exposes all options that relate to using credit cards.

Display Air Force — Exposes all options that relate to Air Force.

Display Vizor — Exposes all options that relate to Vizor. The Aloha POS system no longer supports this feature.

Display break rules — Exposes all options that relate to break rules.



Reference

Refer to the [Employee Breaks Feature Focus Guide - HKS315](#) for more information.

Display Context Panels — Exposes all options that relate to the Context Panels feature.



Reference

Refer to the [Context Panels Feature Focus Guide - HKS346](#) for more information.

Display advanced pizza — Exposes all options that relate to the Advanced Pizza feature.



Reference

Refer to the [Advanced Pizza in Quick Service Feature Focus Guide - HKS1673](#) or [Advanced Pizza in Table Service Feature Focus Guide - HKS321](#) for more information.

Group bar: Restriction settings

Restrict price edit — Prevents managers from using the open item function to bypass item pricing by disabling the 'Ask for Price' and 'Price Level' pricing methods in Item Maintenance, and the 'Ask for Price' pricing method in Submenu maintenance and Modifier Groups maintenance.

Disable real-time updates — Suppresses the real-time update feature. When disabled, a message no longer appears to update the FOH terminal immediately when you add certain records or modify certain options in the system.

Group bar: Employee maintenance

Employee number length — Specifies the number of digits the POS system accepts for an employee ID number.

Minimum number for multi-site employees — Specifies the lowest number in a range of employee numbers you can assign to above store employees. When you assign an employee number in this range, it appears in each store Emp.dbf to eliminate the need to add that employee manually to each store database.

Maximum number for multi-site employees — Specifies the highest number in a range of employee numbers you can assign to above store employees. When you assign an employee number in this range, it appears in each store Emp.dbf to eliminate the need to add that employee manually to each store database.

Display Tax identifier for Multi site employees — Causes the tax ID for multi-site employees to appear in the Employees function at stores other than their home stores.

SSN Validation — Performs a Social Security number validation check on the number entered in the 'Social security number' option in Maintenance > Labor > Employees.

Do not export SSN to POS — Prevents a Social Security number from exporting to Emp.dbf at an individual store. When selected, Emp.dbf shows zeros in the SSN and SSNTEXT columns.

New hires require approval — Determines how 'Employment status' in Maintenance > Labor > Employees > Status tab operates. If you select this option, 'Employment status' is unavailable for store-level employees, and appears as 'Pending' until a corporate-level employee changes the status. The employment status appears as 'Active' by default.

Undefined employee code 1 through 5 label text — Indicates the label text for user-defined options that appear in Maintenance > Labor > Employees > Custom Settings tab. User defined options help you track additional information, such as if the employee is a smoker, owns a car, or other information useful for your establishment. **Related Requirements:** After you create the label text here, define a value for the option in Maintenance > Labor > Employees > Custom Settings tab. For example, to track the number of smokers you employ, replace 'Undefined employee code 1 label text' with 'Smoker.' The word 'Smoker' appears in the Employees function on the Custom Settings tab in place of 'Undefined Code #1.' The Aloha POS system does not use the information on any Aloha reports.

Required Employee Fields tab

Use the Required Employee Fields tab to make certain options in the Employee function mandatory. This helps to obtain consistent information about each new hire you add to the system. When you select a specific option on this tab, the corresponding option in the Employees function becomes mandatory (a red indicator appears next to the option) and must match its counterpart under the 'POS Employee Fields' group bar on the 'Required Employee Fields' tab, before the system allows you to save the employee record.

Group bar: POS Employee Fields

SSN/Identification — Indicates the 'Social security/Identification number' option in the Employees function is mandatory. The Aloha POS system denotes mandatory options with a red indicator. **Note:** This option is always required; therefore, it is selected and unavailable for edit.

Last name — Indicates the 'Last name' option in the Employees function is mandatory. **Note:** 'Last name' is always required and the default selection is selected and unavailable for edit.

First name — Indicates the 'First name' option in the Employees function is mandatory.

Middle (Name/Initial) — Indicates the 'Middle (Name/Initial)' option in the Employees function is mandatory.

Birthdate — Indicates the 'Birthdate' option in the Employees function is mandatory.

Export ID — Indicates the employee identification number that is recognized by third-party software for electronic payroll processing is mandatory. For example, enter the employee ADP number for an ADP interface.

Start date — Indicates the 'Start date' option in the Employees function is mandatory.

Address 1 — Indicates the 'Address 1' option in the Employees function is mandatory.

City / Town — Indicates the 'City / Town' option in the Employees function is mandatory.

State — Indicates the 'State' option in the Employees function is mandatory.

Postal code — Indicates the 'Postal code' option in the Employees function is mandatory.

Telephone — Indicates the 'Phone number' option in the Employees function is mandatory.

Job code — Indicates the 'Jobcode' option in the Employees function to appear.

Job status — Indicates the 'Job status' option in the Employees function is mandatory.

Marital status — Indicates the 'Marital status' option in the Employees function is mandatory.

Number of dependents — Indicates the 'Number of dependents' option in the Employees function is mandatory.

Undefined code 1 through code 5 — Indicates the 'Undefined code 1' through 'Undefined code 5' options in the Employees function are mandatory.

Default Values tab

Use the Default Values tab to control the default behavior of biometric elements in your POS system, such as fingerprint scanners. Biometric identifiers add an increased layer of security.

Group bar: Employee Fields

Use fingerprint scanner for clock in — Requires a fingerprint scan for employees to clock in at the beginning of a shift.

Use fingerprint scanner for login and manager approval — Requires a fingerprint scan to log in to the system and for manager approval when required.

Advanced Pizza Depletion: Pizza Sizes

Select **Maintenance > Menu > Advanced Pizza Depletion > Pizza Sizes** to define the various pizza sizes you sell, such as small, medium, and large.

The POS system uses the Pizza Sizes function in conjunction with the Topping Levels function and pizza menu items to provide increased accountability and more accurately deplete inventory counts. If you support fractional pizzas, sizes can include halves, thirds, and quarters, even though these are not items that typically appear on a pizza menu.



Tip

You must access Maintenance > Business > Additional Features (Corporate Administration) and select 'Display advanced pizza' to view the Advanced Pizza Depletion menu options.



Reference

Advanced Pizza is separate from and does not build upon the Pizza Modifiers feature. Refer to the [Advanced Pizza in Quick Service Feature Focus Guide - HKS1673](#) or [Advanced Pizza in Table Service Feature Focus Guide - HKS321](#) for more information about the Pizza Sizes and Topping Levels functions, which the system uses solely for Advanced Pizza functionality.

Name — Identifies the pizza size, such as Small, Medium, and Large.

Advanced Pizza Depletion: Topping Levels

Select **Maintenance > Menu > Advanced Pizza Depletion > Topping Levels** to define break points for pizza toppings

The POS system uses the Topping Levels function in conjunction with the Pizza Sizes function and pizza menu items to provide increased accountability and to more accurately deplete inventory counts. Base each level upon when the amount of each topping decreases as you add more toppings to the pizza. For example, if you use five ounces of onions on a pizza up to three toppings but decrease to only four ounces of onions when the pizza has four or more toppings, you need to create a new topping level.



Tip

You must access Maintenance > Business > Additional Features (Corporate Administration) and select 'Display advanced pizza' to view the Advanced Pizza Depletion menu options.



Reference

Advanced Pizza is separate from and does not build upon the Pizza Modifiers feature. Refer to the [Advanced Pizza in Quick Service Feature Focus Guide - HKS1673](#) or [Advanced Pizza in Table Service Feature Focus Guide - HKS321](#) for more information about the Pizza Sizes and Topping Levels functions, which the system uses solely for Advanced Pizza functionality.

Name — Identifies and helps reflect a separation of the pizza topping levels, such as 1-3 Toppings, 4-6 Toppings, 7-9 Toppings, and more. **Required Options:** You must select 'Topping' in Maintenance > Menu > Items > Item tab to enable the Pizza Topping Matrix tab and then select the Pizza Topping Matrix tab and select this level from 'Pizza Topping Level' for the appropriate pizza topping.

Minimum Value — Designates the lowest number of toppings to associate with this level. For example, if this level applies to pizzas from one to three toppings, type a minimum value of 1. When the pizza has fewer toppings than this value, the system moves to the next lower pizza topping level.

Maximum Value — Designates the highest number of toppings to associate with this level. For example, if this level applies to pizzas from one to three toppings, type a maximum value of 3. When the pizza has more toppings than this value, the system moves to the next higher pizza topping level.

Alert Settings

Select **Maintenance > Alert > Alert Settings** to access this function.

The Aloha POS system supports several alert types. You configure each alert type using the Alert Settings function and the type of alert you create determines the configuration options available to you. After you define the alert requirements, access the Jobcodes tab to assign the job codes that can receive the alert, and then the Subscribers tab to stipulate the products using the alerts engine. The Aloha POS system is currently the only product available as a subscriber.

Alert types

The Alerts feature supports the following alert types:

Break rule alerts help you maintain compliance in states that mandate employee breaks. Use break rule alerts to notify managers and employees when an employee has not yet taken a break within the defined break time threshold. The job code under which an employee clocks in determines the applicable break rule alerts they can receive. You can configure a break rule alert to display on the Front-of-House (FOH) terminal only.

Overtime alerts help managers monitor the hours worked by multiple employees throughout a shift to reduce overtime exposure and to ensure the restaurant meets compliance regulations for employees that are due for and have not yet taken required rest or meal breaks. Using overtime alerts, managers no longer rely on reports to determine employees that may be approaching overtime or those who require breaks for a given shift. You can configure an overtime alert to display on the FOH terminal only.

Custom alerts provide an unlimited variety of ways to set up reminders, such as an alert sent to an employee to clean the bathrooms, or an alert sent to a manager to place a food order. You can configure a custom alert to display on the FOH terminal and/or print to a printer.

Approaching workweek hours threshold alerts provide the ability to comply with reporting requirements for the Patient Protection and Affordable Care Act. Companies must track employees who work more than 30 hours in a week. This alert notifies managers when individual employee weekly worked hours approach 30.

Settings tab

Use the Settings tab to easily determine the number and name used to uniquely identify a record. You also use this tab to activate an alert and establish the alert criteria.

Group bar: Settings

Display name — Specifies a descriptive name to display when the alert appears on the FOH screen. The display name can contain up to 28 characters. If you do not enter a display name, the alert type appears as the name on the FOH screen. **Documented Version:** v12.3.

Active — Indicates this alert is active and in use. **Documented Version:** v12.3.

Priority — Specifies the order in which alerts appear in the FOH. The default value is '1.' **Documented Version:** v12.3.

Dismiss at end of day — prevents the alert from appearing again after the EOD process runs. The EOD process dismisses the alert. **Documented Version:** v12.3.

Alert expiration days — Specifies the number of days an alert that has not been dismissed can remain on the FOH Alerts screen before being dismissed by the Alert Engine.' A valid entry is between '1' and '14.' **Documented Version:** v12.3.

Group bar: Break rule

The 'Break rule' group bar appears only when you select 'Break rule' as the alert type.

Break rule — Specifies the break rule to apply to this alert. **Documented Version:** v12.3.

Hours worked before alerting for the 1st break — Specifies the number of hours and minutes an employee must work before the first break alert appears, in HH:MM format. For example, type 02:45 if you want the alert to appear two hours and 45 minutes after an employee begins their shift. **Documented Version:** v12.3.

Hours worked before alerting for the 2nd break — Specifies the number of hours and minutes an employee must work before the second break alert appears, in HH:MM format. For example, type 04:45 if you want the alert to appear four hours and 45 minutes after an employee begins their shift. **Documented Version:** v12.3.

Hours worked before alerting for the 3rd break — Specifies the number of hours and minutes an employee must work before the third break alert appears, in HH:MM format. For example, type 06:45 if you want the alert to appear six hours and 45 minutes after an employee begins their shift. **Documented Version:** v12.3.

Hours worked before alerting for the 4th break — Specifies the number of hours and minutes an employee must work before the fourth break alert appears, in HH:MM format. For example, type 08:45 if you want the alert to appear eight hours and 45 minutes after an employee begins their shift. **Documented Version:** v12.3.

Hours worked before alerting for the 5th break — Specifies the number of hours and minutes an employee must work before the fifth break alert appears, in HH:MM format. For example, type 10:45 if you want the alert to appear 10 hours and 45 minutes after an employee begins their shift. **Documented Version:** v12.3.

Alert even if break is waived — Enables the alert to appear regardless of whether the employee waived the break. **Documented Version:** v12.3.

Group bar: Overtime

The 'Overtime' group bar appears only when you select 'Overtime' as the alert type.

Hours to alert before overtime begins — Specifies the number of hours and minutes prior to an employee reaching overtime to send an alert. **Documented Version:** v12.3.

Alert only for weekly overtime — Enables the alert to appear only when an employee is approaching overtime based on hours worked for the week, and not on hours worked for the day. **Documented Version:** v12.3.

Group bar: Custom schedule

The 'Custom schedule' group bar appears only when you select 'Custom' as the alert type.

Alert every — Allows you to specify the interval at which the alert is to reappear or print. For example, if you want an alert to reappear or print every 20 minutes, type '00:20,' in HH:MM format. **Documented Version:** v14.1.

Activation schedule — Designates the activation schedule to use to determine the frequency at which the system sends the alert. **Related Requirements:** You define activation schedules in Maintenance > System Settings > Activation Schedules. **Documented Version:** v12.3.

Start time — Indicates the start time defined in the selected activation schedule in Maintenance > System Settings > Activation Schedules. **Documented Version:** v12.3.

End time — Specifies a time, at which to end the custom alert. **Documented Version:** v12.3.

Activation start date — Indicates the date you want the alert to become active at the store. **Documented Version:** v12.3.

Activation end date — Indicates the date you want the alert to no longer be active at the store. **Documented Version:** v12.3.

Group bar: Text

The 'Text' group bar appears only when you select 'Custom' as the alert type.

Line 1 through Line 10 — Specifies the text to appear for the custom message. Each line allows 25 characters of text. **Documented Version:** v12.3.

Group bar: Approaching workweek hours threshold

The 'Approaching workweek hours threshold' group bar appears only when you select 'Approaching workweek hours threshold' as the alert type. To comply with reporting requirements for the Patient Protection and Affordable Care Act, companies must track employees who work more than 30 hours in a week. This alert notifies managers when individual employee weekly worked hours approach 30.

Hours to alert before employee reaches workweek hours threshold — Specifies the number of hours prior to reaching the 30-hour threshold, to alert the manager using the calculation, 'Hours worked + hours to alert before employee reaches full time equivalent of workweek >= Workweek hours threshold.'

Include hours scheduled for the rest of the week — Includes the employee scheduled hours in the calculation as follows: 'Hours worked + hours scheduled till end of week + hours to alert before employee reaches full time equivalent of workweek >= Workweek hours threshold.'

Employees included — Enables you configure the alert to include 'Full time only,' 'Part time only,' or 'Full time & part time' employees.

Jobcodes tab

Use the Jobcodes tab to establish the job codes to receive the alert when the criteria is met.

Group bar: Jobcodes

Jobcodes — Designates one or more job codes to receive the alert. **Documented Version:** v12.3.

Subscribers tab

As of this publication, the only subscriber available for the Alerts function is the Aloha POS.

Group bar: Subscribers

Subscribers — Specifies the subscriber to receive the alert. **Documented Version:** v12.3.

Filter — Determines the application that receives the alert based on the selected subscriber. An employee with 'View alerts' and 'Dismiss alerts' selected in Maintenance > Labor > Pos Access Levels > Access Level tab under the 'System' group bar is considered a manager and can view their own alerts and any alerts sent to managers. **Documented Version:** v12.3.

Send alert to terminals — Determines if you want the alert and its content to appear on the POS terminals as the destination path. This option is automatically preset for you for a break rule or overtime alert. **Documented Version:** v12.3.

Send alert to printer — Determines if you want the alert and its content to print to a printer as the destination path. This option is only available for a custom alert. **Documented Version:** v12.3.

Barcode Messages

Select **Maintenance > Messaging > Barcode Messages** to access this function.

Use the Barcode Messages function to configure the system to print a QR Code on your guest checks, that, when scanned, directs a customer to your Web site or displays a message that appears in Notepad®.

Message tab

Use the Message tab to configure the details of the bar code message.

Group bar: Settings

Name — Identifies the bar code message. For example, 'Web site.'

Type — Specifies the type of bar code or QR code for the selected message. '2D (QR Code)' is currently the only option.

Group bar: Barcode

Embedded text — Designates the text to embed in the QR Code. Text can include, but is not limited to, hyperlinks to Web sites, product information, and embedded product details. For example, the full URL for your Web site, such as 'http://myfavcafe.com.'



Note

Use 150 characters or less to preserve the quality of the QR Code.

Break Reminder Messages

Select **Maintenance > Messaging > Break Reminder Messages** to access this function.

Use the Break Reminder Messages function to create one or more messages to remind employees to take their breaks. We recommend you word the message in the form of a direction, such as “Please coordinate an hour lunch break with your manager.” We also recommend you create a reminder message specific to each break rule you configured as eligible to be waived.

Message tab

Use the Message tab to configure the unique identifier for the message and to specify the message text.

Group bar: Settings

Name — Identifies the break reminder message.

Group bar: Text

Line 1 through Line 5 — Specifies the text to appear in the break reminder message. You can enter five lines of text at 50 characters per line.

Break Rules

Select **Maintenance > Labor > Break Rules** to access this function.

The jurisdiction in which the restaurant resides governs the breaks employees are required, by law, to take. Breaks can be paid or unpaid, mandatory or optional; some optional breaks require the employee must explicitly waive the right to take the break. For basic breaks, the Break Rules function is the key function for developing the requirements for your breaks.

Break Rule types

The Aloha POS system comes configured with two default corporate-level break rules you can use as examples; Paid (record 1) and Unpaid (record 2). You can make changes to the default break rule records, such as renaming a break rule, making a break rule inactive, or configuring a break rule to count toward overtime.

Unpaid indicates the break rule applies to unpaid breaks. Selecting this option disables 'Count toward overtime.'

Paid indicates the break rule applies to paid breaks. Selecting this option enables 'Count toward overtime.'

Break Rule tab

Use the Break Rule tab to easily determine the number and name used to uniquely identify the break rule, activate a break rule, and establish rule criteria, such as when the break rule appears, age requirements, and more.

Group bar: Settings

Active — Indicates the break rule is currently in effect.

Count toward overtime — Designates that employees receive overtime wages for paid break minutes taken after they reach overtime status. **Required Options:** You must select 'Paid' as the break type to enable this option.

Can be split in two — Enables you to split a break into two breaks that can be taken at separate times. Once the employee takes the first partial break, the employee must take the second break at a later time, in accordance to the time restrictions as if the break was a whole. This feature depends on whether you defined break minutes for the selected break. **Related Options:** This option disables 'Eligible for on-duty paid break' under the 'On duty break' group bar.

Group bar: On duty break

Eligible for on-duty paid break — Allows you to configure the break as an on-duty paid break and grants access to perform actions in the Front-of-House (FOH). Use this option in cases where an employee is working, possibly without a manager, and must remain on the premises and work during their break, as needed. If cleared, the employee cannot access and perform actions on the FOH, unless they log back in to the system. This option is negated if the employee does not agree to the

on-duty break agreement message when they clock in. **Required Options: 1)** This option enables the 'Display on-duty break agreement at clock in' option. **2)** You must clear 'Can be split in two' under the 'Settings' group bar to enable the 'Eligible for on-duty paid break' option.

Display on-duty break agreement at clock-in — Specifies the on-duty break agreement message (waive break message) to appear for an on-duty paid break when the employee clocks in. If the employee does not accept the agreement, the break is not an on-duty break. **Required Options:** You must select 'Eligible for on-duty paid break' to enable this option.

Group bar: Waive

Eligible to be waived — Enables eligible employees to waive a break and activates waive break messages for the selected break rule. **Related Options:** Selecting this option enables 'Display break waive messages at' and 'Waive break message.'

Display break waive message at — Determines when the waive break message appears. **Required Options:** You must select 'Eligible to be waived' to enable this option.

Clock in — Shows the selected waive break message when the employee clocks in.

Clock out — Shows the selected waive break message when the employee clocks out.

Waive break message — Designates the specific waive break message to show for the selected break rule. **Required Options:** You must select 'Eligible to be waived' to enable this option.

Group bar: Qualifiers

You can qualify a break rule to restrict or add an extra break for an employee based on their age, the time the employee clocks in, and the time the employee clocks out.

Only applies to Minors — Specifies this break rule applies only to employees who are defined as minors. **Required Options:** You must access Maintenance > Business > Store > Store Settings tab > Labor group and specify the age at which you are no longer considered a minor in your state in 'Minor age is under' under the 'Employee settings' group bar. **Related options:** Selecting this option enables 'Employee age range type.'

Employee age range type — Specifies the type of age qualifier to use for the break rule. **Required Options:** Select 'Only applies to Minors' to enable this option.

None — Indicates this break rule applies to no specific age range.

Under — Indicates this break rule applies to employees younger than the age you specify in 'Employee age.'

Between — Indicates the employee age must fall between the values you set for 'Employee age from' and 'Employee age to.'

Above — Indicates this break rule applies to employees older than the age you specify in 'Employee age.'

Employee age — Specifies the age an employee must be younger than or older than, for the break rule to be applicable. **Required Options:** You must select 'Under' or 'Above' in 'Employee age range type' to enable this option.

Employee age from — Specifies the starting age of employees for which this break rule applies. You must select 'Between' in 'Employee age range type' to enable this option.

Note

When you restrict a break rule by age, the break rule applies only to that age group. To allow employees outside of the age group to earn breaks, you must configure other break rules.

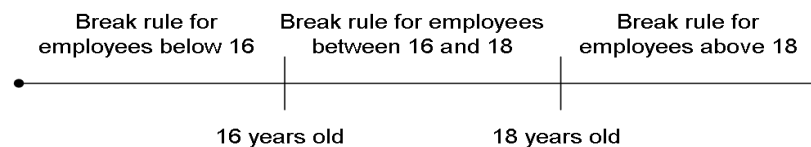


Figure 4 - 2 Break Rule Age Qualifier Setup

Employee age to — Specifies the ending age of employees for which this break rule applies. **Required options:** You must select 'Between' in 'Employee age range type' to enable this option.

Shift start time range type — Specifies the type of shift start qualifier to use for the break rule. You can select 'None,' 'Before,' 'Between,' or 'After.'

Shift start time — Specifies the shift start time at which to activate the break rule. Valid time entries for this option are from 00:00 to 23:59. **Required Options:** You must select 'Before' or 'After' in 'Shift start time range type' to enable this option.

Shift start time from — Specifies the starting time for the shift start range. Valid time entries for this option are from 00:00 to 23:59. **Required Options:** You must select 'Between' in 'Shift start time range type' to enable this option.

Note

When you restrict a break rule by the time the employee clocks in, the rule applies to only those employees who clock in during the times you configure. To allow employees not included in the restriction to earn breaks, you must configure other break rules.

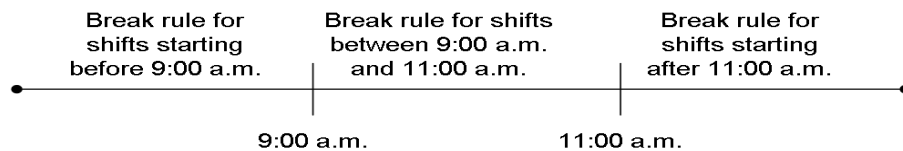


Figure 4 - 3 Break Rule Shift Start Qualifier Setup

Shift start time to — Specifies the ending time for the shift start range. Valid time entries for this option are from 00:00 to 23:59. **Required Options:** You must select 'Between' in 'Shift start time range type' to enable this option.

Shift end time range type — Specifies the type of shift end qualifier to use for the break rule. You can select 'None,' 'Before,' 'Between,' or 'After.'

Shift end time — Specifies the shift end time at which to activate the break rule. Valid time entries for this option are from 00:00 to 23:59. **Required Options:** You must select 'Before' or 'After' in 'Shift start end range type' to enable this option.

Shift end time from — Specifies the starting time for the shift end range. Valid time entries for this option are from 00:00 to 23:59. **Required Options:** You must select 'Between' in 'Shift end time range type' to enable this option.

Note

When you restrict a break rule by the time the employee clocks out, the rule applies only to those employees who clock out during the times you configure. To allow employees outside of the restriction to earn breaks, you must configure other break rules.

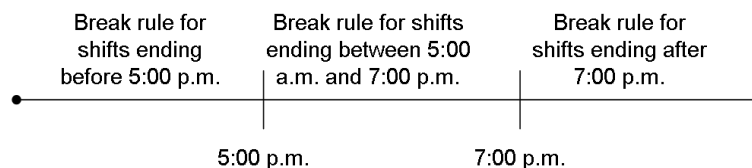


Figure 4 - 4 Break Rule Shift End Qualifier Setup

Shift end time to — Specifies the ending time for the shift end range. Valid time entries for this option are from 00:00 to 23:59. **Required Options:** You must select 'Between' in 'Shift end time range type' to enable this option.

Rules tab

Use the Rules tab to define hours worked, qualification requirements, and break enforcement penalty information, to help enforce breaks and reduce break violations.

Group bar: Rules

Apply only one break based on hours worked — Restricts an employee to taking only one of the breaks for which they qualified, when the employee works enough qualified hours to earn one of multiple official breaks. For example, if the employee qualifies for a 15 minute break between three and a half and five hours worked, but qualifies for a 30 minute break after working six hours, this option offers both break options on the FOH until the employee selects one, and then removes the option for the second break. If the employee selects the wrong break option a break rule violation appears after the shift ends. **Required Options:** You must configure at least two mutually exclusive break times under the 'Hours and time' group bar. **Related Options:** Selecting this option disables 'Recurring.'

Recurring — Restarts the first set of break requirements each time the employee reaches the maximum worked hours specified for the selected break. The system automatically creates a new occurrence with an offset of one minute, based on the maximum worked hours, and allows the employee to earn another break of the same type and length with every new occurrence. **Required Options:** You must clear 'Apply only one break based on hours worked' to enable this option.

Break calculation method — Configures break start time frames based on either the number of hours into the shift the employee works, or on a set time of the day. Some labor laws require employees to start their breaks within a specific time frame. **Related Options:** This option defaults to 'Hours into a shift' if you clear the 'Recurring' check box.

Apply penalty if break is missed — Enables you to configure the system to compensate any employee who misses an earned break.

Hours to pay if break is missed — Specifies the number of work hours to award as penalty pay when an employee misses an earned break. **Required Options:** You must select 'Apply penalty if break is missed' to enable this option.

Penalty pay rate — Specifies the method by which to calculate the penalty pay rate when a break rule violation occurs. Choose 'Regular pay rate' or 'Minimum wage rate.' **Required Options:** You must select 'Apply penalty if break is missed' to enable this option.

Enforce minimum break minutes — Prevents an employee from returning from a break before taking their minimum break minutes, unless a manager or employee approves the early break return. Enforcing the minimum minutes an employee must take for a break helps locations that legally require employees to take their allotted breaks. If an employee tries to return from a break without taking their

minimum break minutes, the system prompts them to either approve the early break return or seek manager approval for the early break return. If the early break return is approved, a violation can occur, depending on the break type.

Enforce break start time — Prevents an employee from starting a break too early or too late.

Display break reminder at clockin — Activates a break reminder to appear at clock in for a scheduled employee.

Break reminder message — Specifies the exact break reminder message to appear for the employee. **Related Options: 1)** You must select 'Display break reminder at clockin' to enable this option. **2)** You define break reminder messages in Maintenance > Messaging > Break Reminder Messages.

Exclude unpaid break minutes from hours worked — Excludes consumed unpaid break minutes from the hours worked when qualifying for the next break.

Group bar: Hours and time

The options under the 'Hours and time' group bar enable you to assign hour and time parameters to specific break rules. If the break rules are recurring, add only one break rule row in this section; otherwise, you can add up to three break rule rows. Click 'Add' and then complete the following for each row:

Minimum hours worked for a break — The minimum hours, from 0 to 24, an employee must work to earn a break.

Maximum hours worked for a break — The maximum hours, from 0 to 24, an employee must work to earn a break.

Minimum break minutes per interval — The minimum break minutes per interval (i.e., the minimum uninterrupted break minutes) an employee must take to constitute a break.

Maximum paid break minutes per interval — The maximum break minutes per interval for which an employee gets paid for the break. Any minutes taken after the maximum paid minutes are unpaid. Typing 0 (zero) stipulates to pay for all break minutes taken. The break must be longer than the defined minimum break minutes.

Earliest time a break can start — Specifies the earliest time an employee can start a break without manager approval. For example, if you type 12:00, an employee cannot start a break until 12:01 p.m., unless a manager approves the early break **Required Options: 1)** You must access Maintenance > Labor > Break Rules > Rules tab and select 'Time of day' as the 'Break calculation method' under the 'Rules' group bar to enable this option. **2)** If the 'Break calculation method' is unavailable, clear 'Recurring' to enable additional options to appear.

Latest time a break can start — Specifies the latest time an employee can start a break without manager approval. For example, if you type 16:00, the employee can start a break anytime from the earliest time up to 4:00 p.m., but cannot start a break at 4:01 p.m. **Required Options:** You must access Maintenance > Labor > Break Rules > Rules tab and select 'Time of day' as the 'Break calculation method' under the 'Rules' group bar to enable this option. 2) If 'Break calculation method' is unavailable, clear 'Recurring' to enable additional options to appear.

Store Group tab

Use the Store Group tab if you are an existing Aloha customer migrating to the new Aloha system with existing break rules. Any existing break rules assigned to a state and included in the StateLoc.dbf file appear in the 'Included' list on the Store Group tab after import.

Campaign Rulebook

Select **Maintenance > Guest Experience > Campaign Rulebook** to access this function.

The Campaign Rulebook function is where you define the actual set of conditions under which a guest can earn a reward for a campaign. You also specify the reward the guest receives when they meet the conditions of the campaign. The reward can be in the form of a printed voucher to be redeemed on their next visit to your restaurant, or an immediate reward, such as a free \$5.00 gift card with the purchase of \$50.00 in gift cards.

Note

The Promotions feature in the Aloha POS is robust and can handle a lot of your marketing needs. If possible to achieve your promotion goal using Promotions, choose this function first.

Campaign Rulebook quick tips:

- Activating a campaign requires using the 'Activation Schedule' and 'Event Schedule' functions.
- For campaigns where you offer a voucher to drive traffic back into your restaurant, use Print Designer to create the voucher. We recommend you begin creating the voucher by copying the default 'General Message' template provided for you, rather than creating a layout from scratch, to save time and to complete the task more quickly. You can then remove elements from, or add elements to, your new layout, and move elements up or down, to change the order in which they appear on the voucher.
- For campaigns where you offer bounce-back rewards, we recommend you create a separate category for each campaign.
- For campaigns in which you offer bounce-back gift cards at a discount, you must create a 'New Price' promotion in the Promotions function.
- For campaigns in which you offer non-gift card items at no charge, create a zero-priced item in Items Maintenance.

Reference

Refer to the [Campaign Rulebook Feature Focus Guide - HKS324](#) for more information.

Campaign Rulebook tab

Use the Campaign Rulebook tab to identify a specific campaign to configure. These options govern the number of times a guest qualifies for a campaign, when a condition is met more than once.

Group bar: Identification

Number — Specifies an identification number for the selected campaign. You can accept the default, system-assigned number, or assign a number that conforms with your corporate standards.

Name — Identifies the selected campaign.

Group bar: Settings

Apply action repeatedly if condition is met more than once — Allows the guest to receive a reward for each valid occurrence of the campaign conditions on a guest check. For example, in a campaign that stipulates a 'Free Taco' voucher prints when a guest orders an entrée and a drink, if a family orders a burrito platter, an enchilada platter, and two drinks, valid conditions exist on the guest check for the guest to receive two 'Free Taco' vouchers. **Documented Version:** v14.1.

Maximum number of times to apply the action — Stipulates the number of times a guest can qualify for a campaign, per guest check. **Related Options:** You must select 'Apply action repeatedly if condition is met more than once' to enable this option. **Documented Version:** v14.1.

Rules tab

Use the Rules tab to define the criteria under which a guest earns a reward for the selected campaign, and the reward the guest is to receive.

Group bar: Campaign Rules

Rule — Shows the rule as you define it using the Conditions tab and Actions tab. For example, 'No condition(s) specified' and 'No action(s) specified' appear in red text until you add a condition or action to the rule. When you add a condition or action, the terms appear in place of the red text. You can add as many conditions or actions as desired.

Rules > Conditions tab

Use the Rules > Conditions tab to define the requirements a guest must meet to earn a reward. Click the Add drop-down arrow under the 'Conditions' group bar to select a condition type.

Condition types

Category creates a campaign rule based upon the guest ordering items from one or more selected categories.

Check total creates a campaign rule based upon the guest check total.

Comp creates a campaign rule stipulating that if a comp appears on the guest check, then the survey does not print.

Promo creates a campaign rule stipulating that if a promo appears on the guest check, then the survey does not print.

Order Mode creates a campaign rule based upon the guest ordering items from one or more selected order modes.

Condition quick tips:

- When a guest must meet *two or more conditions* to qualify for a reward, add each condition separately under the 'Conditions' group bar. For example, category is FOOD *and* check total is \$30.00.
- When a guest must meet *one or another condition* to qualify for a reward, add each condition separately under the 'Category Condition' group bar. For example, category is Appetizers or category is Liquor.

Group bar: Conditions

Condition — Specifies the criteria the guest must meet to qualify for the reward. Add more than one condition, if the guest must meet two or more conditions to qualify for the reward. **Related Options:** When you define a 'Category' condition type, the 'Category Condition' group bar appears. When you define an 'Order Mode' condition type, the 'Order Mode Condition' group bar appears.

Group bar: Category Condition

The 'Category Condition' group bar only appears when you choose 'Category' as the condition type.

Category — Specifies the category from which the guest must make a purchase to qualify for the reward. Add more than one category, if the guest must make a purchase from *one or another category* to qualify for a reward. **Required Options:** You must select 'Category' as the condition type to enable this option.

Sales Threshold — Specifies the minimum amount a guest must spend, in the selected category, to qualify for the reward. Zero (0.00) is a valid amount. **Required Options:** You must select 'Category' as the condition type to enable this option.

Group bar: Order Mode Condition

The 'Order Mode Condition' group bar only appears when you choose 'Order Mode' as the condition type.

Order Mode — Specifies the order mode from which a guest must make a purchase to qualify for the reward. For example, you can specify a reward for only DINE IN customers. Add more than one order mode, if the guest must make a purchase from *one or another order mode* to qualify for a reward. **Required Options:** You must select 'Order Mode' as the condition type to enable this option.

Group bar: Check total

The 'Check total Condition' group bar only appears when you choose 'Check total' as the condition type.

Check total — Specifies the check total value from which a guest must reach to qualify for the reward. For example, you can specify a reward if a guest check totals \$30.00 or more. **Required Options:** You must select 'Check total' as the condition type to enable this option.

Group bar: Comp

The 'Comp' group bar only appears when you choose 'Comp' as the condition type.

Comp — Stipulates that if a comp is present on the guest check, that the survey does not print.

Required Options: You must select 'Comp' as the condition type to enable this option.

Group bar: Promo

The 'Promo' group bar only appears when you choose 'Comp' as the condition type.

Promo — Stipulates that if a promo is present on the guest check, that the survey does not print.

Required Options: You must select 'Promo' as the condition type to enable this option.

Rules > Actions tab

Use the Rules > Actions tab to define the specific reward the guest receives when the conditions on the guest check match the selected campaign conditions. Click the Add drop-down arrow under the 'Actions' group bar to select an action type.

Action types

Print general message prints a general message on the guest check when the items on the guest check meet the specified criteria. This is usually in the form of a printed voucher the guest can redeem on a later visit. For example, when a guest purchases an entrée, you can print a voucher offering the guest a free dessert on their next visit, with the provision the guest redeem the voucher within a designated time period.

Add Item adds an immediate bounce-back reward to the guest check when the items on the guest check meet the specified criteria. For example, you can offer a free \$5.00 gift card with the purchase of \$50.00 in gift cards.

Print Survey prints a survey on the guest check when the items on the guest check meet the conditions set on the Conditions tab.

Action quick tips:

- You can print multiple messages on the guest check for meeting selected conditions. For example, select 'Print general message' under the 'Actions' group bar, then select multiple qualifying messages under the 'Print general message' group bar.
- You can add multiple items to offer as rewards for meeting selected conditions. For example, select Add Item under the 'Actions' group bar, and then select multiple qualifying items under the 'Add Item' group bar.

Group bar: Actions

Action — Specifies the reward the guest receives when the conditions on the guest check match the selected campaign conditions. **Related Options:** When you define a 'Print general message' action type, the 'Print general message' group bar appears. When you define an 'Add Item' action type, the 'Add Item' group bar appears.

Group bar: Print general message

The 'Print general message' group bar only appears when you choose 'Print general message' as the action type.

General message — Allows you to select the specific message to print on the guest check from a list of previously defined messages, such as 'Bring this receipt for a free appetizer on your next visit.'
Required Options: You must select 'Print general message' under the 'Action' group bar to enable this option. **Related Requirements:** You must access Maintenance > Hardware > Print Designer and create general messages and surveys.

Group bar: Add Item

The 'Add Item' group bar only appears when you choose 'Add Item' as the action type.

Add Item — Allows you to select the specific item to add to the guest check, such as the bounce-back \$5.00 gift card. **Required Options:** You must select 'Add Item' under the 'Action' group bar to enable this option.

Print Survey — Allows you to select the specific survey to print on the guest check from a list of previously defined surveys you can fill out to earn a reward. For example, 'Tell us what you think and earn a free large drink on your next visit.'
Required Options: You must select 'Print Survey' under the Action group bar to enable this option.

Cash Cards

Select **Maintenance > Hardware > Cash Cards** to access this function.

Cash Card types

The system supports the Debittek and Intercard cash card devices. These cash card devices allow you to sell a cash card to a customer, accept a cash card as payment, and query a Debittek cash card for its balance.

Cash Card Device tab

Use the Cash Card Device tab to identify the cash card hardware.

Group bar: Settings

Name — Identifies the cash card device. Naming conventions are user-defined; however, we recommend the printer name reflect the physical location of the device.

Type — Designates the type of cash card device.

Terminal — Identifies the terminal to which the cash card device connects.

Port — Specifies the port where the defined cash card device connects to the terminal.

Cash Drawers

Select **Maintenance > Hardware > Cash Drawers** to access this function.

Cash drawers are devices in which you keep various forms of payment tenders, such as cash, checks, coupons, vouchers, and other payment methods. Cash drawers usually have removable money trays with multiple compartments, to keep the drawer organized. Some cash drawers come with added features. For example, a 'compulsory' cash drawer warns you when the drawer is open and requires you to close the drawer before you can enter the next order.

Cash drawers connect to a computer workstation (i.e., order entry terminal) through a serial port, a parallel port, or through an interface port on a receipt printer. When the system accesses a cash drawer, it sends a signal to the assigned cash drawer in one of two ways:

- When you connect the cash drawer to the printer designated for the order entry terminal, the printer signals the drawer after it receives the initial signal from the terminal.
- When you connect the cash drawer directly to the order entry terminal, the terminal signals the drawer.

Cash Drawer types

If the type of cash drawer you currently use does not appear in the list when you click the drop-down arrow, contact Technical Support for help with selecting an appropriate cash drawer type from the list.

Cash Drawer tab

Use the Cash Drawer tab to configure the number and name used to uniquely identify a cash drawer. Valid entries range from 1 to 999. We recommend you establish cash drawer names that reflect their physical location, such as Bar 1, Pantry, Patio, or Dining. Type up to 15 characters. The Cash Drawer tab also enables you to assign a cash drawer to a printer or computer terminal, and define the parameters for how the cash drawer operates.

Group bar: Settings

Name — Identifies the cash drawer.

Public cash drawer — Enables employees with cash drawer capabilities to access the drawer, if they do not have open transactions with another drawer. **Required Options: 1)** You must make a drawer public in the Front-of-House (FOH) Special Functions screen as part of your daily cash drawer assignments. **2)** You must access Maintenance > Labor > Jobcodes > Financial tab and select 'Uses cash drawers' under the 'Financial' group bar for employees who need access to cash drawers.

Related Options: To prevent an employee from using a public cash drawer in another revenue cen-

ter, if the employee already has transactions in a different revenue center, access Maintenance > Business > Store > Store Settings tab > Security group and select 'Limit public cash drawer to revenue center' under the 'Cash Drawer' group bar.



Reference

Refer to the [Public Cash Drawers Feature Focus Guide - HKS376](#) for more information on configuring and using public cash drawers.

Global public cash drawer — Enables employees with cash drawer capabilities to access the drawer, even when another employee is assigned as the primary owner of the cash drawer.

Perform drawer reconciliation — Configures the cash drawer to require reconciling all tenders at checkout. When you run a checkout for the drawer, you receive the prompt, "Would you like to reset the drawer totals?" Responding 'Yes' invokes the drawer reconciliation process.

Number reconciliation attempts — Defines the number of reconciliation attempts allowed for the drawer before you must call a manager, or employee with sufficient access, to intervene. Valid entries range from 0 to 9. **Related Options:** You must select 'Perform drawer reconciliation' to enable this option.

Display unused tender types — Lists all defined tender types on the reconciliation screens, even if the tender was not used as a form of payment. This allows a manager to adjust a tender type that would ordinarily not appear in the list during reconciliation since the tender type was not used during that specific shift. Use this option when you use drawer reconciliation as opposed to payment reconciliation. **Required Options:** You must select 'Perform drawer reconciliation' to enable this option.

Audit selected coupons — Specifies the employee assigned to the cash drawer must perform a coupon audit count at checkout for all qualifying coupons. **Required Options:** For a promotion of the Coupon type, you must access Maintenance > Payments > Promotions > Coupon tab and select 'Audit count at checkout' under the 'Coupon' group bar to qualify a coupon for audit count.

Disable coin changer — Disables a coin changer by cash drawer, if one is assigned and attached to the terminal. The coin changer functions for any other cash drawer assigned to the terminal. Use this option for sites that use a coin changer and more than one cash drawer per terminal.

Number of attempts — Defines the number of reconciliation attempts allowed for the coupon count before you must call a manager, or employee with sufficient access, to intervene. Valid entries range from 0 to 9. **Related Options:** You must select 'Audit selected coupons' to enable this option.

Terminal — Defines the terminal number to which the cash drawer connects.

OPOS name — Indicates the name of the OPOS Cash Drawer file as it appears in the Registry Editor. (Note: The driver files must be installed first.) For example, the OPOS name for a Panasonic cash drawer could be either JD-9000CD1 or JD-9000CD2. To determine this, access a DOS command

line, type REGEDIT and press Enter. The Registry Editor displays. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and CashDrawer. The installed drivers display under CashDrawer. Type a maximum of 30 characters. **Required Options:** You must select OPOS Cash Drawer, as the cash drawer type to enable this option.

Disable default compulsory method — Allows you to perform order entry functions without closing the cash drawer between transactions. The “Please close the cash drawer” message does not appear. This feature can increase speed of service, especially for environments where order entry and check closing are done using two different FOH terminals; however, turning off the compulsory cash drawer functionality poses a security risk and we strongly recommend keeping it active.

Required Options: You must select a cash drawer type other than Printer Interface to enable this option. **Documented Version:** v12.3.

Group bar: Printer interface

Printer — Specifies the printer to which the cash drawer connects. **Required Options:** You must select Printer Interface as the cash drawer type to enable this option.

Drawer number — Determines the connection order number of the cash drawer device. The value for the first connected drawer is ‘1,’ and the value for the second connected drawer is ‘2.’ You can connect up to two drawers at a time to any one printer. **Required Options:** You must select ‘Printer interface’ as the cash drawer type to enable this option.

Group bar: Serial interface

Compulsory method — Indicates the drawer is open, and does not allow an employee to start a new check until the drawer closes. **Related Requirements:** You must select ‘Serial 225 32000’ as the cash drawer type to enable this option.

CTS — Clear to Send (CTS) is assigned to pin 8 for a 9-pin serial port, and to pin 5 for a 25-pin serial port.

RI — Ring Indicator (RI) is assigned to pin 9 for a 9-pin serial port, and to pin 22 for a 25-pin serial port.

Note

If, when using CTS or RI, the selected port has no drawer attached or the attached drawer does not support this method, the Aloha POS system prevents employees from entering an order or making a no-sale transaction.

Port — Specifies the physical port where the cash drawer connects to the terminal. **Required Options:** You must select ‘Serial 225 32000’ as the cash drawer type to enable this option.

Categories

Select **Maintenance > Menu > Categories** to access this function.

The Categories function enables you to combine similar menu items into groups for reporting and forecasting purposes. You can also use categories to effectively manage special item promotions and comps, or to support other features in the system.

Category types

Sales represents related food and beverage items grouped together for tracking and sales analysis. Results are available immediately through manager function keys on order entry terminals. You can create a maximum of 40 sales categories.

Retail represents related retail items, such as caps and shirts grouped together for tracking and sales analysis. This category is typically used for non-food and non-beverage items. The results are available immediately through manager function keys on order entry terminals.

General works in conjunction with the promotion and comp functions in Aloha. Each time you create a new comp or promotion, you must indicate to which items in your database the comp or promotion applies. This ensures that you maintain control over the items included in your featured specials. For example, let's say you want to set up a comp for employees so they can purchase certain food items at a 50% discount. In this example, you create a non-sales category called 'employee meal' and assign only the items eligible for the employee comp discount to the 'employee meal' category. Later, when you set up an employee comp, you assign the 'employee meal' category to the comp. This way, when a server or cashier applies the comp to the employees guest check, only items configured in the 'employee meal' category receive the 50% discount.



Tip

An item you assign to a sales or retail category in Maintenance > Menu > Items, can also be assigned to multiple general categories.

Deleting Category Records

You cannot delete a category that is assigned to a promotion, comp, order mode, or performance measure. An error message appears, which lists the referenced records. You must remove the association from the individual record before you can delete the category.

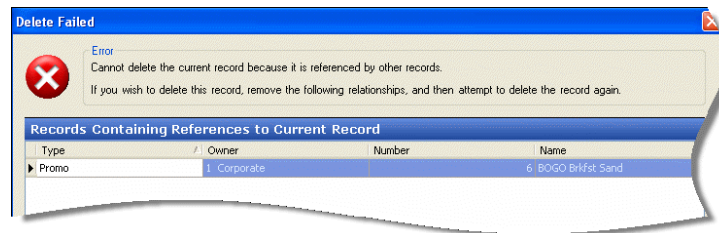


Figure 4 - 5 Category Deletion Error Message

Categories quick tips:

There are several rules or tips to follow when you add a new category and start to assign items to categories:

- You *must* assign every item to either one sales or one retail category, in order to have correct reporting information.
- You cannot assign an item to both a sales category and a retail category. For example, if you assign 'coffee' to a sales category, you cannot assign 'coffee' to a retail category.
- It is not mandatory to assign an item to a general category.
- You can assign an item, in a sales or retail category, to one or more general categories.
- You can delete a category, if you first associate items in that category to a different category.
- You can configure combinations of sales and retail items for up to 999 categories.

Category tab

Use the Category tab to determine the number and name, and to establish whether you can exclude it from tippable sales, and more.

Group bar: Settings

Name — Identifies the category.

Description — Provides a more detailed description of how you use the category in your environment. Type a maximum of 40 characters.

PMS sales category — Corresponds to one of the four Aloha categories in a hotel property management system (PMS). Hotel property management systems typically set up categories as follows: 1-Food, 2-Liquor, 3-Beer, and 4-Wine.

Accounts receivable sales category — Specifies the Account Receivable (AR) sales category field in the Aloha Back Office Accounts Receivable product to which the current category reports.

Maximum per check — Limits the number of times you can add an item from this category to a single check. Type a number between 0 (none) and 999 (unlimited). When you exceed the defined number of the same item on a check, the system determines if the employee has a sufficient access level to add more of the same item. If the employee does not have sufficient access, the Manager Approval screen appears. If the manager has sufficient access, they can approve adding the item.



Tip

To approve items over the limit, a manager must have 'Override category limits' selected in their access level.

For items in more than one category, the most restrictive category determines the number of times you can add the item to the check. For example, if you place alcoholic drinks in a category that allows only two of the same item per check, and in another category that allows five items per check, the system enforces the limit of two items per check.

When you access Maintenance > Menu > Items > Pricing tab and select 'Affects inventory' under the 'Quantity price options' group bar, the system enforces the limit based on the quantity you enter for the item. For example, if you enter Wings with a quantity of 20, but the category to which you assign Wings has a 'Maximum per check' value of 10, the manager approval screen appears to get authorization for 20 Wings.

When you access Maintenance > Menu > Items > Pricing tab and clear 'Affects inventory' under the 'Quantity price options' group bar, the system enforces the limit based on the number of times you add the item to the check. If Wings are set up as in the previous example, the manager approval screen appears on the 11th attempt to add Wings to the guest check.

Enable redemption vouchers — Enables the printing of a redemption voucher for each item in this category when ordered. This option relates to integrating with a third-party service that utilizes QR-coded redemption vouchers for consumers to use for item pickup in another area. **Related Options:** Selecting this option exposes the Redemption Voucher tab in this function. **Documented Version:** v19.11.



Reference

Refer to [Supporting Redemption Vouchers with QR Code - HKS1777](#) for more information.

Group bar: Aloha Takeout

Aloha Takeout Grocery Category — Enables the selected category to subsequently print on the drivers' itinerary to remind them to bring these items with them when making deliveries, thus saving time and preventing lost sales. You can only use an item category one time in the list. Grocery item

examples are bottled and canned beverages. **Recommended Configuration:** Add a non-sales category in the Aloha POS system that contains all grocery items, like beverage cans and bottles, non-kitchen sides, and self-service items.



Reference

Refer to the [Aloha Takeout Implementation Guide - HKS326](#) for more information on establishing an Aloha Takeout grocery category.

Items tab

The Items tab appears only when you select a category of the General type. Use the Items tab to select specific items to include in the category. The list on the left side of the screen contains unassigned items that currently exist in the items database. The list on the right side of the screen displays items already assigned to the selected category.

Use the >> and << arrows to move items between the 'Available' list and the 'Included' list. **Related Requirements:** To define an item, access Maintenance > Menu > Items.

Redemption Voucher tab

The Redemption Voucher tab appears only when you select 'Enable redemption vouchers' under the Settings group bar on the Category tab. Use this tab to establish the behavior when you integrate with a third-party service and print QR-coded redemption vouchers for consumers to use when you direct them to a another area of the restaurant for item pickup.

Sample use cases:

- A restaurant that utilizes a third-party drink dispenser where consumers must scan a QR code at the machine to dispense their beverage. Use this solution to restrict refills of all or certain drinks, such as sugary beverages.
- A restaurant that includes an entertainment area that contains QR code-supported gaming devices.
- An entertainment venue that provides QR code-supported vending machines, for such things as t-shirts, bottled drinks, and more.

Group bar: Configurations

Default redemption code — Designates the default QR redemption code to print for items in this category when the Aloha POS system cannot communicate with the third-party service (offline mode).

Documented Version: v19.11.

Default redemption code method — Determines whether or not to use append epoch (UTC) when formatting the timestamp. **Documented Version:** v19.11.

Your choices are:

No transform — Does not use append epoch when determining the timestamp to use for the QR redemption code.

Append epoch (UTC) — Uses append epoch when determining the timestamp to use for the QR redemption code.

Print long name on voucher — Prints the item long name on the voucher along with the QR code.
Documented Version: v19.11.

Print timestamp on voucher — Prints the time at which you print the voucher along with the QR code. **Documented Version:** v19.11.

Clock In Message

Select **Maintenance > Messaging > Clock In Message** to access this function.

Use the Clock In Message function to create special messages that target individual employees, or specific job codes. The Clock In Message function uses message types to trigger the message that is to appear when certain conditions are met. For example, if you verify the liquor certification for employees who sale alcohol, the system uses the 'Liquor certification warning' and Liquor certification expiration' message types to notify employees at clock in when their liquor certification is either close to or has expired. Clock In messages appear on the screen at clock in only and do not print on the clock in chit.

Clock In Message types

General displays a message for which you configure the message text, such as a meeting reminder. The same text appears at every clock in until you change the text and run a Refresh. You typically do not impose restrictions for messages of the "General" type; they appear for all employees regardless of the job code under which the employee clocks in.

Liquor certification warning displays a system generated message that states, "Your liquor certification will expire in *n* days" where *n* is the number of days prior to the liquor expiration date for the employee clocking in to the system. You can expand the text to appear on the screen at clock in within the message definition. You must access Maintenance > Labor > Jobcodes and create a job code for which you enable liquor verification, and establish the number of days prior to expiration for the message to begin appearing, and then assign that job code to employees who sell alcohol. Access Maintenance > Labor > Employees > Certification tab to establish the liquor certification expiration date.

Liquor certification expiration displays a system-generated message that states, "Your liquor certification has expired" when the liquor certification for the employee clocking in has expired. You can expand the text to appear on the screen at clock in within the message definition. You must access Maintenance > Labor > Jobcodes and create a job code for which you enable liquor verification, and then assign that job code to employees who sell alcohol. You establish the liquor certification expiration date on the Certification tab in Maintenance > Labor > Employees.

Punch adjustment displays a system-generated message for an employee when they clock in on the following business day after their manager performs an edit punch for their clock in, clock out, break in, or break out punch, letting them know that their time was edited. At that point, the employee can approve the adjustment or reject it so it can be further reviewed between the employee and their manager. Additionally, you can configure the system to require manager approval for a rejection and prevent the employee from clocking in. This ensures all adjustments the manager makes to time records are acknowledged by the employee on a timely basis. You must access Maintenance > Labor > Jobcodes and configure punch edit acknowledgments under the 'Time and attendance' group bar for each job code for which you want punch adjustment messages to appear.

Rate change acknowledgement displays an acknowledgment for an employee when they clock in on the following business day after a manager performs a tip credit or pay rate change, essentially

tracking employee acknowledgments for audit reporting. NCR Back Office provides the tip credit amount to the Aloha POS. Use the Jobcodes tab to send the acknowledgment to a specific or group of job codes; use the Employees tab to send the acknowledgment to one or more specific employees.

Sales and tip distribution adjustment displays an acknowledgment for an employee when they clock in on the following business day after a manager redistributes sales and tips and alters the tip amount received by the employee. Use the Jobcodes tab to send the acknowledgment to a specific or group of job codes; use the Employees tab to send the acknowledgment to one or more specific employees. You must access Maintenance > Labor > Jobcodes and configure sales and tip acknowledgments under the 'Time and attendance' group bar for each job code for which you want sales and tip adjustment messages to appear.



Reference

Other resources include the [Sales and Tip Distribution Feature Focus Guide - HKS379](#), the POS v12.3 Enhancement Release Guide, and the POS v14.1 Enhancement Release Guide.

Message tab

Use the Message tab to determine the number and name of the clock in message and to define the message text. Valid message numbers range from 1 to 999999.

Group bar: Settings

Name — Identifies the message. Message names must be between 1 and 20 characters long.

Group bar: Clock in message

Line 1 through Line 5 — Provides up to five lines for the message that appears at clock in, such as when the liquor certification for an employee is about to expire. Type a message, such as "Please provide your manager with a renewed certification number and expiration date or you will not be able to clock in with this job assignment."

Jobcodes tab

Use the Jobcodes tab to assign a clock in message to one or more job codes.

Group bar: Jobcodes

Use the >> and << arrows to move job codes between the 'Available' list and the 'Included' list.

Employees tab

Use the Employees tab to assign a clock in message to one or more employees.

Group bar: Employees

Use the >> and << arrows to move employees between the 'Available' list and the 'Included' list.

Coins and Bills

Select **Maintenance > Payments > Coins and Bills** to access this function.

Use the Coins and Bills function to define specific coins and currencies to use for the reconciliation features. The reconciliation coin screen contains all U.S. coin currencies, from the penny to the silver dollar, as a default. You can customize the screen for International coin currencies to accommodate the coins you accept at your establishment. For example, if you are located on the northern U.S. border, and accept the Canadian dollar, you can add the Canadian dollar as a valid coin currency.

All countries have a currency value equivalent to the value of 1, such as the U.S. dollar, Japanese yen, Mexican peso, German deutschemark, or Canadian dollar. For the respective country, they have a coin currency subdivision to equal the value of 1. For example, the United Kingdom uses the British pound as the value of 1, and has coin subdivisions to equal a pound, such as 100 pence (100/1=100), 20 shillings (100/20=5), 4 crowns (100/4=25), and others. The coin value of these would be '0.01,' '0.05,' and '0.25,' respectively.



Reference

Refer to the [Drawer Reconciliation Feature Focus Guide - HKS310](#) and [Employee Reconciliation Feature Focus Guide - HKS307](#) for more information on configuring and using defined coins.

Coin and Bill tab

Use the Coin and Bill tab to determine the number and name used to uniquely identify the currency. Valid entries are from 1 - 99. We recommend you define all active coins in order of their coin value, highest to lowest. You also use this tab to establish whether a currency is active, the value of the currency, and more.

Group bar: Settings

Name — Identifies the coin or bill. Type a maximum of 15 alpha-numeric characters.

Active — Specifies the coin or bill is active in the system and appears on the coin count details screen in the FOH.



Tip

The default U.S. coin values appear first in the coin count details screen in the FOH when you enter your coin counts. If you do not accept U.S. currency, we recommend clearing 'Active' on these coins so they do not appear and the coins you do accept appear on the first page of the coin count details screen.

Value — Specifies the value of the coin or bill in relation to the whole value of the basic monetary unit. For example, for the U.S., the basic monetary unit is the dollar and the value of a dime in relation to the dollar is \$0.10.

Roll value — Indicates the value of the coin when it is rolled for distribution. This amount must be evenly divisible by the coin value. For example, the value for a roll of quarters cannot be \$10.01 because \$10.01 is not evenly divisible by \$0.25. When you click Save, the system calculates the number of coins that equals one roll and this value appears to the right.

Foreign currency — Designates the foreign currency to use for determining the symbol and conversion rate. When you modify a foreign currency, the change applies to all payments assigned to that foreign currency. **Related Requirements:** You define foreign currencies in Maintenance > Payments > Foreign Currencies.

Comp Codes

Select **Maintenance > Payments > Comp Codes** to access this function.

In early versions of Aloha Manager, you had to manually configure a comp-verification file (CompVer.txt) to enable the FOH system to verify the names and numbers of non-Aloha POS system employees, when applying comps. When an employee number was listed in the comp-verification file, the FOH system applied the employee name and number to the selected comp name. If an employee number was not listed in CompVer.txt, the FOH warned you with an invalid employee message, but you could still apply the comp to the check.

With the current Aloha POS system, you use the Comp Code function in conjunction with the Comp Employees function to create a name and number combination for comp verification. Add the comp code using the Comp Code function, and then link the comp code to an employee ID, such as a bus driver that receives comp meals, using the Comp Employees function. Based on the number assigned in Comp Codes, and the comp ID and name, the Aloha POS system automatically creates CompVer.txt in the \Newdata folder during export, and then copies it to the \Data folder during the Refresh process. The FOH system automatically checks against CompVer.txt for employee comp verification.

The following is an example of a CompVer.txt file with valid data:

Column	Description
1-10	Identification number, which is verified by the FOH.
11-25	Employee first name.
26-40	Employee last name.
41-45	Comp code (numeric)

123	Bill	Changer	1
234	Steve	Smart	2
456	Carrie	Calmer	2
678	Chris	Smith	3

Comp Code tab

Use the Comp Code tab to determine the number and name used to identify a comp. Valid entries are from 1 - 999999. Type a maximum of 20 characters.

Group bar: Identification

Name — Identifies the comp code to associate with an employee ID in the Comp Employees function.

Comp Employees

Select **Maintenance > Payments > Comp Employees** to access this function.

In early versions of Aloha Manager, you had to manually configure a comp-verification file (CompVer.txt) to enable the FOH system to verify the names and numbers of non-Aloha POS system employees, when applying comps. When an employee number was listed in the comp-verification file, the FOH system applied the employee name and number to the selected comp name. If an employee number was not listed in CompVer.txt, the FOH warned you with an invalid employee message, but you could still apply the comp to the check.

With the current Aloha POS system, you use the Comp Code function in conjunction with the Comp Employees function to create a name and number combination for comp verification. Add the comp code using the Comp Code function, and then link the comp code to an employee ID, such as a bus driver that receives comp meals, using the Comp Employees function. Based on the number assigned in Comp Codes, and the comp ID and name, the Aloha POS system automatically creates CompVer.txt in the \Newdata folder during export, and then copies it to the \Data folder during the Refresh process. The FOH system automatically checks against CompVer.txt for employee comp verification.

Comp Employee tab

Use the Comp Employee tab to determine the number and name used to identify a record. Valid entries are from 1 - 999999.

Identification — Specifies the alpha-numeric identification number to assign to the employee. Type a maximum of 10 characters.

First name — Specifies the first name of the employee for whom you want to assign a comp code.

Last name — Specifies the last name of the employee for whom you want to assign a comp code.

Comp code — Indicates the comp code you want to assign the employee.

Comps

Select **Maintenance > Payments > Comps** to access this function.

Use the Comps function to define and configure a wide array of comps for use in the Aloha POS system. Comps are the discounts you create for employee meals, manager meals, guest complaints, and other good will measures. You create comps using the dialog boxes in conjunction with the categories defined in Maintenance > Menu > Categories. You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels, and add comp buttons to panels for display on the Front-of-House (FOH) terminals.

Categories are an important part of comps. A full understanding of categories is important to get the most from the Comps function. Comps are often defined in terms of a category, and depending on the needs of the restaurant, you may need to create special 'general' categories just for use with comps.

Comp types

Regular indicates the comp is a basic discount.

Aloha Loyalty indicates the comp is a real-time discount used with the Aloha Loyalty rewards program. This comp type disables most of the options available on the Comps and Restrictions tabs.

Related Options: You must access Maintenance > Business > Additional Features (Configuration Administration) > Corporate Owner tab and select 'Display Aloha Loyalty' under the 'Options to display' group bar to expose the options required for configuring this comp type.

Comp tab

Use the Comp tab to determine the number and name used to uniquely identify the comp, as well as the method by which the Aloha POS system calculates the value of the comp. Valid entries are from 1 - 999 and the name can be up to 20 characters.

Group bar: Settings

Check name — Specifies a descriptive name that prints on the guest check when you apply the comp. Type a maximum of 20 characters.

Method — Indicates how the system calculates the value of the comp.

Fixed percent — Enables the comp to apply a set percentage. **Required Options:** You must type a percentage amount if you select 'Percent off.'

Prompt for percent — Indicates the Aloha POS system prompts for the entry of the percentage to decrease the check.

Prompt for amount — Indicates the Aloha POS system prompts for the comp amount at the order entry terminal. Used for non-percentage comps.

Cost based — Enables the comp to decrease the check based on a specified mark-up percentage of the inventory cost of the item. **Related Options:** This option enables the 'Markup percent' option.

Percent off — Specifies the percentage to discount when you apply the comp. Type the percentage and press Enter. For example, to set this amount to 50% off, type 50 and press Enter. The system converts the decimals for you (50.0000). **Required Options:** You must select 'Fixed percent' or 'Prompt for percent' as the pricing method to enable this option.

Maximum amount — Establishes a maximum dollar amount you can discount. **Related Options:** If you do not select 'Prompt for amount,' you must select the items to comp when you apply the comp. Neither the item total or the entered amount can be more than the amount specified here. For example, if you define the comp as 100% but 'Maximum amount' is set to \$5.00, the customer is responsible for the balance if the item total is more than \$5.00.



Tip

Dollar amount comps cannot be set as a fixed amount. Select 'Prompt for amount' and the FOH prompts for the amount when you apply the comp.

Markup percent — Multiplies the inventory cost of the item by the markup percentage and adds the value to the cost, to calculate the reduced price of the item. For example, the inventory cost of an item is \$1.00 while the retail price is \$5.00, and the markup percentage is 10%, then \$0.10 (markup) is added to \$1.00 (inventory cost) to equal \$1.10 (employee cost). The employee receives a \$3.90 decrease from \$5.00 (retail price). If you do not supply a cost for the item in Item Maintenance, the Aloha POS system cannot decrease the check using this method. **Required Options:** You must select 'Cost based' as the pricing method to enable this option.

Allow before items ordered — Enables you to apply a comp before any items are added to the check. Use this option if you want to create a single, continuous 'running comp' check. Additionally, if you manipulate an item which has been comped, such as a priced substitution or void, the comp automatically adjusts to reflect the alteration. **Related Options:** If you select this option and clear 'Must select items,' the system allows the comp to apply to a single, continuous 'running comp' check. **Documented Version:** v12.3.

Report as — Defines the comp name used for tracking and reporting sales applied with this comp.

 **Tip**

To report a comp as itself, click **Save**, then select the current comp from the 'Report as' drop-down list.

Print check on close — Prints a copy of the guest check immediately after tendering and closing the check, for the guest to view. In a table-service environment, we recommend you clear this option as the guest leaves the restaurant before the last and final closing of the check.

Open drawer on close — Enables the cash drawer to open when you apply the comp.

Manager required — Requires a manager to apply the comp.

Include comp amount in gratuity calculation — Enables the Aloha POS system to apply a gratuity to the guest check, *after* adding the selected comp to the check.

Must select items — Requires you to select the menu items to discount before you apply the comp. **Related Options:** If you clear this option, and select 'Allow before items ordered,' the system applies and adjusts the comp as you add, substitute, and delete items on the check, allowing you to create a running comp check. **Documented Version:** v12.3.

Prompt for unit (store number) — Indicates the Aloha POS system prompts you to enter the unit number on the FOH. This is useful for multi-store operations that accept employee comps from other locations. **Note:** The store number is derived from the number entered at time of store import.

Prompt for name — Prompts you to enter a name, such as the name of the employee receiving the comp, when applying the comp to a guest check in the FOH. This is helpful when tracking who receives employee comps.

Require identification for name — Requires an employee receiving a comp to slide his or her magnetic ID card through a card reader instead of typing the number manually. **Required Options:** You must select 'Prompt for name' to enable this option.

Restrict to employees with comp code — Enables you to restrict an employee to using a specific comp that you select from the comp code drop-down list. **Required Options:** You must select 'Prompt for name' to enable this option. **Related Options:** Access Maintenance > Payments > Comp Code to define comp codes.

Text entry required — Forces the entry of a descriptive reason, using the FOH Special Message screen, for applying the comp. You must include the SpecialMSG variable in the comp approval form design (CompForm.txt or CPFnnnnnn.txt) to print the reason on the form. **Documented Version:** v12.3.



Reference

Refer to the [Comp Approval Forms Feature Focus Guide - HKS345](#) for more information on configuring and using comps.

Group bar: Bar code range

Lowest — Establishes the lowest of two values in the valid bar code number range for this comp. For example, if the valid bar code range for this comp is 13000 thru 13004, type 12999 here; 13000 is the next highest number and the first valid bar code number for this comp. **Documented Version:** v12.3.

Highest — Establishes the highest of two values in the valid bar code number range for this comp. For example, if the valid bar code range for this comp is 13000 thru 13004, type 13005 here; 13004 is the last valid bar code number for this comp. **Documented Version:** v12.3.

Group bar: Validation

Prompt for validation code — Forces the system to prompt for the entry of a validation code.

Numeric only — Allows the entry of numeric-only values for the validation code. **Required Options:** You must select 'Prompt for validation code' to enable this option.

Restrict length — Imposes a limit on the number of digits used for a validation code. **Required Options: 1)** You must select 'Prompt for validation code' to enable this option. **2)** You must enter a value in 'Length.'

Length — Specifies the length of text you can type for the validation code. **Required Options:** You must select 'Restrict length' to enable this option.

Validate card through Aloha Loyalty — Uses the Aloha Loyalty service to validate the comp card rather than the Aloha POS system. **Required Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display Aloha Loyalty' under the 'Options to display' group bar to expose this option.

Card prefix — Designates the first five alphanumeric characters, *not* starting with the number zero (0), to use for validation of the comp card. **Required Options:** You must select 'Validate card through Aloha Loyalty' to enable this option. **Related Options:** To use numeric values only for the prefix, select 'Numeric only.'

Print voucher for invalid card — Prints a separate voucher to the local printer when Aloha Loyalty does not validate the card, and returns with a FOH message indicating the reason why validation failed. **Required Options:** You must select 'Validate card through Aloha Loyalty' to enable this option.

Group bar: Hotel Property Management System

Authorize through hotel interface — Requires you to enter a room number, and upon a response, sends the transaction to the property management system in use. **Required Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display property management' under the 'Options to display' group bar to expose this option.

Allow offline posting — Enables offline posting for the comp when the Aloha POS system cannot connect to the PMS. A manager or employee with sufficient access must approve the comp if the Manager Approval screen appears. **Required Options: 1)** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display property management' under the 'Options to display' group bar to expose this option. **2)** You must select 'Authorize through hotel interface' to enable this option. **3)** Access Maintenance > Labor > Pos Access Levels and select 'Approve offline hotel charges' for a manager or other high level employee.



Reference

Refer to the Aloha PMS Integration Guide for more information.

Default account number — Identifies the primary PMS account connected to the Aloha PMS system. **Required Options: 1)** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display property management' under the 'Options to display' group bar to expose this option. **2)** You must select 'Authorize through hotel interface' to enable this option.

Taxes tab

The system provides multiple tax options to ensure restaurants comply with various laws regarding the handling of taxes for comps. Based on the tax jurisdiction, the tax laws may require some restaurants to pay the tax on all comps, while other restaurants pass the tax on to customers.

You can apply primary, secondary, or vendor taxes to comps. And you can specify if you want to apply taxes to the full item price, before you apply a comp.

Guest pays tax — Requires the guest to pay the tax on the comp. If cleared, the restaurant pays the tax.

Group bar: Primary taxes

Apply tax to comp amount — Applies the primary tax to the full amount of the comp. The system calculates the tax on the original item price before applying the comp.

Apply tax on food cost only — Uses the percentage defined in 'Food Cost %' to apply a tax amount on only the food cost in the comp. **Related Options:** Selecting this option enables the 'Food Cost %' option. **Required Options:** You must define a tax percentage in 'Food cost %.'

Food cost % — Defines a tax percentage (using decimals) to calculate an approximate food cost. Valid percentages range from 0.0 to 99. **Required Options:** You must select 'Apply tax on food cost only' to enable this option.

Override tax on comp amount — Assigns the selected tax type to apply to the comp. Some jurisdictions require the restaurant to pay the tax on all promotions. One way to track such promotion-specific tax amounts is to create a special tax type called Promotions/Comps. **Required Options:** You must select 'Apply tax to comp amount' to enable this option. **Related Requirements:** You define taxes in Maintenance > Taxes > Tax Type.

Group bar: Secondary taxes

Apply tax to comp amount — Applies a secondary tax to the comp amount. The system calculates the tax on the original item price before applying the comp.

Group bar: Vendor taxes

Apply tax to comp amount — Applies the vendor tax to the full amount of the comp.

Tax food cost — Uses the percentage defined in 'Food cost%' under the 'Primary taxes' group bar to apply a vendor tax amount on the food cost in the comp. **Related Options:** Selecting this option enables the 'Food Cost %' option. **Required Options:** You must select 'Apply tax to comp amount' to enable this option.

Food cost % — Defines a tax percentage (using decimals) to calculate an approximate food cost. Valid percentages range from 0.0 to 99. **Required Options:** You must select 'Tax food cost' to enable this option.

Group bar: Surcharge

Surcharge comp amount — Applies a tax to the comp amount. This option is for use with surcharges only.

Restrictions tab

Use the Restrictions tab to define the limitations on the comp, govern how promotion items are handled with a comp, and how other comps affect it. This tab is unavailable for the 'Aloha Loyalty' comp type.

Group bar: Promotion restrictions

Allow items discounted by a promotion — Indicates the selected comp can include items defined as promotions.

Allow with existing promotions on check — Allows multiple promotions on the same guest check.

Allow subsequent promotions on check — Allows subsequent promotions on the check to be eligible for the selected promotion.

Group bar: Comp restrictions

Allow items discounted by another comp — Allows already discounted comp items to be eligible for the selected comp.

Allow with existing comps on check — Allows multiple comps on the same guest check.

Allow subsequent comps on check — Allows subsequent comps on the check.

Group bar: Maximum

Per check — Defines the maximum allowable number of each comp per check. A warning message appears on the FOH when you attempt to apply more comps than the number specified for this option. The number you specify must be higher than one. **Related Options:** Values established here are ignored if you select 'Auto apply if possible,' located in Maintenance > Payments > Promotions > Group Combo tab,

Eligibility tab

Use the Eligibility tab to designate a category of items to discount with this comp. If you select a category, you can apply the comp discount only to items purchased from the designated category; if you do not select a category, you can apply the comp discount to items from all categories. It is also possible to stipulate a specific combo a guest must purchase to be eligible for the comp.

Group bar: Items

Eligible items — Specifies the category of items discounted by the comp when purchased by the guest. If not None, you can apply the comp discount only to items purchased from the category you select from the drop-down list. If None, you can apply the comp discount to items from all categories. **Related Requirements: 1)** To define an item, select Maintenance > Menu > Items. **2)** To define a category, select Maintenance > Menu > Categories.

Group bar: Combos

Specifies one or more combos the customer must order to be eligible for the comp. Use the >> and << arrows to move combos between the 'Available' list and the 'Included' list.

Concept

Select **Maintenance > System Settings > Concept** to access this function.

Use the Concept function to identify separate store types operating from the same database. Concepts are an increasingly common convention in the corporate-to-store hierarchy where you use a master database to maintain menus and items for all subordinate operations that are only used in their respective concepts, such as a steak house, a seafood restaurant, and more. This provides top-level reporting capabilities per store in the Sales report and PMix report. The PMix report displays two columns for quantity count and percentage sold *for each concept*.

You assign concepts to individual items in Maintenance > Menu > Items. For example, an item, such as pepperoni, is sold only at one concept; therefore, 100% of pepperoni sales appears on reports for that concept only. If you configure items to be shared throughout stores, such as beverages, you must determine a common distribution to attribute appropriate sales numbers to the proper concept. To accomplish this, we recommend you apply the concept 'None' to all common items in the master database. Access Maintenance > Menu > Items > Item tab and select a 'Concept' under the 'Assignments' group bar.

Concept tab

Use the Concept tab to determine the number and name used to identify a record. Valid entries are from 1 - 999.

Group bar: Settings

Name — Identifies the concept to which you assign items to facilitate more detailed and accurate reporting. Type a maximum of 20 characters.

Common distribution % — Determines the percentage of transaction data to distribute to the concept for common items. Valid percentages range from 0.00 to 100 percent. The total of all defined concepts must equal 100%. If the total distribution of all concepts does not equal 100%, the system recalculates the percentages, as necessary. The sales for common items are distributed between the concepts for reporting purposes.

Concepts

Select **Maintenance > System Settings > Concepts** to access this function.

Use the Concepts function to represent different brands under the same company. For a virtual kitchen solution, add a concept for the host restaurant and each virtual kitchen in use. You then associate each concept with a revenue center in the Maintenance > System Settings > Revenue Center function.



Reference

Refer to the [Virtual Kitchen Feature Focus Guide - HKS1718](#).

Concepts tab

Use the Concepts tab to determine the number and name used to identify a record. Valid entries are from 1 - 999.

Group bar: Settings

Name — Identifies the concept.

County

Select **Maintenance > Labor > County** to access this function.

The County function works in conjunction with the State function, for use in NCR Back Office Labor. Use this function to associate one or more counties to a state, as needed. To define your states, select Maintenance > Labor > State.

County tab

Use the County tab to determine the number and name used to identify the county. Valid entries are from 1 to 999999.

Group bar: Settings

Name — Identifies the county. Type a maximum of 25 characters.

Custom EDC Response Messages

Select **Maintenance > Messaging > Custom EDC Response Messages** to access this function.

When an electronic payment declines, an error message appears on the front-of-house (FOH) terminal. Each processor sends a unique set of error messages; the wording of which may confuse employees. Due to the difference between the processors and the messages they provide, it is difficult for restaurants to effectively train their employees.

Use this function to define additional text to appear when the original electronic payment error message fails to instruct the employee on what steps to take to assist the guest. We recommend you contact your processors and obtain a complete list of all possible electronic payment decline error messages; the system reads the existing key phrase of the processor error message, and displays additional text that you provide, giving guidance to your employees when an error message appears. Your text also appears in the guest check window.



Tip

You must select 'Uses Electronic Draft Capture' in Maintenance > Business > Installed Products to view this function.

Custom EDC Response Message tab

Use the Custom EDC Response Message tab to create and identify the custom EDC response record. For Aloha Manager users, there is only one custom EDC response record. If you are a CFC user, it is possible to create multiple custom EDC response records.

Group bar: Identification

Name — Identifies the custom EDC response record. The default text is 'Custom EDC Response Messages.'

Phrases tab

Click Add for each existing key phrase obtained from your processor that requires additional explanation.

Existing key phrase — Contains the decline message obtained from the processor. For example, 'Sys Error-Call 197.'

Additional text to display line 1 — Allows you to add more descriptive text to explain the message response obtained from the processor. For example, 'Bad swipe or bad mag reader.'

Additional text display line 2 — Allows you to add even more descriptive text to explain the message response obtained from the processor, if necessary. For example, 'Try again.'

Additional text to display line 3 — Allows you to add even more descriptive text to explain the message response obtained from the processor, if necessary. For example, 'Contact your manager.'

Custom FOH Reports

Select **Maintenance > Business > Custom FOH Reports** to create custom reports to replace a report that does not provide you with information in a way that meets your reporting needs or to extend the existing default FOH reports. By creating your own reports, you have unlimited flexibility for reporting on any facet of your operation, such as comps and promotions, tipouts, and more. Additionally, you can filter the reporting data by one or many employees.



Reference

Refer to the [Custom FOH Reports Feature Focus Guide - HKS320](#) for more detailed information regarding how to create a custom report.

To allow a manager, or other employee, sufficient access to run custom FOH reports, access Maintenance > Labor > Pos Access Levels and select 'Custom Reports' under the 'Reports' group bar for each access level requiring the ability to run custom FOH reports.

Custom FOH Report tab

Use the Custom FOH Report tab to identify the report, to define how data included in the report sorts and appears, and to filter the job codes to include in the report.

Group bar: Identification

Name — Identifies the report.

File name — Identifies the configuration file, created by either Aloha Manager or Aloha Configuration Center in the NewData directory, for this specific report. The name of the file is read-only. The naming convention is CustomFOHReportNumberx, where x is the sequential number of the report.

Allow report to be run for multiple employees at a time — Enables you to select and generate data in the report on more than one employee at a time. If you clear this option and select more than one employee, the report appears blank and with no data. **Documented Version:** v19.3.

Group bar: Display options

Report format — Determines the format in which to sort and display the data in your report. Available choices include:

Standard — Displays values for the entire day for the line item. This is the default behavior.

Sort data in 15 minute increments — Displays the total value of each line item in 15 minute increments, for the entire day. Zero (0) appears for time increments for which data is not present.

Sort data in 30 minute increments — Displays the total value of each line item in 30 minute increments, for the entire day. Zero (0) appears for time increments for which data is not present.

Sort data in 60 minute increments — Displays the total value of each line item in 60 minute increments, for the entire day. Zero (0) appears for time increments for which data is not present.

Sort by Day Part — Displays the total value for each line item for each configured day part. Zero (0) appears for day parts for which data is not present.

Sort by Revenue Center — Displays the total value for each line item for each configured revenue center. Zero (0) appears for revenue centers for which data is not present.

Group bar: Filter by Jobcode

Use the >> and << arrows to move items between the 'Available' list and the 'Filter by' list.

Number — Indicates the ID number assigned to the job code.

Name — Identifies the job code.

Design tab

Use the Design tab to add or edit configuration data for the selected report.

Report lines — Represents the report line as it currently exists in the configuration file. You can manually type the dynamic calculations and strings in this column or click the ellipsis in 'Edit report line' to access the Report Line Builder dialog box and make your selections

Edit report line — Allows you to access the Report Line Builder dialog box and make selections that build the report line for you.

Day Part

Select **Maintenance > System Settings > Day Part** to access this function.

The Day Part function enables you to define specific time periods that divide a business day into multiple day parts. These time periods help you organize business data for reporting purposes, and enable other Aloha features that rely on defined day parts, such as event scheduling, surveys, and tip sharing.

Day Part tab

Use the Day Part tab to determine the number and name (description) used to identify the record. Valid entries are from 1 to 99.

Description — Identifies the day part. We recommend the description reflect the time of your business day for which you define it, such as Breakfast, Lunch, Happy Hour, and more.

Start time — Determines the start time of the day part. Use a 24-hour clock format. Hours are on the left, minutes on the right. For example, type midnight as 00:00 or 5:00 p.m. as 17:00. You cannot type any time later than 23:59.

Debug Event

Select **Maintenance > System Settings > Debug Event** to access this function.

This function enables you to configure a debug event for the current store. The debug event file writes to Debug.cfg in the %lberdir%\Data directory to report data on specific actions by the Aloha POS system for troubleshooting.



Note

As a best practice, we recommend that you not add or activate any debugging events unless you are actively troubleshooting problems, and that you remove these debugging events as soon as possible. Additional data added to Debug.cfg can make the files very large.

Debug Event tab

Use the options on the Debug Event tab to identify the specific event, define its parameters, and schedule when the event is active.

Group bar: Identification

Name — Identifies the debug event.

Group bar: Debug Event Terminals

Type — Identifies the type of debug event.

Touch — Actions passed from screen touches.

EDC — Actions passed from Aloha EDC to the Aloha POS system.

PMS — Actions passed from the PMS in use, to the Aloha POS system.

Events — Writes events that were scheduled using Event Schedule.

Customer Display — Actions passed from the Aloha POS system to a customer defined display in use.

Custom Debug — Actions passed based on specific criteria that you define.

FOH COM 1 — Actions passed from FOH COM 1.

FOH COM 2 — Actions passed from FOH COM 2.

FOH COM 3 — Actions passed from FOH COM 3.

Activation schedule — Uses the selected activation schedule to control when the debug event occurs. You define activation schedules in Maintenance > System Settings > Activation Schedules.

Terminal — Allows you to run the debug event for one or all terminals. The debug event for the Custom Debug type defaults to All terminals and cannot be changed.

Text — Specifies a custom filter you configure to require the debug event to report on specific text. This option applies to Custom Debug events only.

Active — Indicates the debug event is active/inactive.



Note

If you configure a debug event you want to repeat on an irregular schedule, you clear Active under the Debug Event Terminals group bar until you want to run the event again, to eliminate the need for recreating the event each time you wish to run it.

Start time — Indicates the time to activate the event at the store. This option is 'read only,' and populates from the selected activation schedule.

Start date — Indicates the date you want the event to become active at the store.

End date — Indicates the date you want the event to no longer be active at the store.

Default Favorites

Select **Maintenance > Business > Default Favorites** to access this function.

When you open Aloha Configuration Center or Aloha Manager, an Open Task pane appears on the left side of the screen. Click Favorites, located at the bottom of the Open Task pane, to access a list of the most commonly used functions. Each option in this list acts as a shortcut to the specific function selected. To take full advantage of the Default Favorites function, we recommend you create a default favorites list prior to creating employees in the POS system so that these functions appear for every employee you add. Each employee can then right-click the Favorites pane and customize the list to coincide with their own specific needs. If you create the default favorites record after you create your employees, the default favorites only appear for any new employees you create. The system assumes existing employees have already customized the Favorites pane to reflect their own personal commonly used functions.

Settings tab

On the Settings tab, you specify a name for the default favorites list.

Group bar: Identification

Name — Identifies the default favorites list.

Design tab

Use drag and drop to move specific functions from the 'Available functions' group box on the left, to the 'Favorites' group box on the right.

Deposit Reasons

Select **Maintenance > System Settings > Deposit Reasons** to access this function.

Use the Deposit Reasons function to define standards for named deposits, such as 'Drop 1,' 'Drop 2,' 'Mid-shift Deposit,' 'Large Bills Deposit,' and more. You decide the rules governing when employees must make a deposit and provide the deposit reasons to identify when all deposits are correctly made and accounted for within the Aloha POS system. When an employee performs a drawer reconciliation, or an employee reconciliation, deposit reasons identify the deposits and aid in the reconciliation process.

Deposit Reason tab

Use the Deposit Reason tab to define reasons you can use to identify deposits by name or number. We recommend you use descriptive names that provide context for each deposit and aid in the reconciliation process.

Group bar: Settings

Description — Indicates the deposit reason by name.

Active — Indicates the deposit reason is currently available for use.

Display Boards

Select **Maintenance > Hardware > Display Boards** to access this function.

A display board is a physical stand from which guests place an orders. Display boards are commonly used in drive-thru environments and provide a visual indication of the order to the guest, including any modifications to the order, and the total purchase. The board shows what they ordered and allows them to correct any errors before sending the order to the kitchen.

Most display boards show a continually scrolling greeting message. When an employee begins taking an order, the Aloha Front-of-House (FOH) determines if a display board is currently active. If so, it writes the order to the display board when an item is rung up or removed from the order. This enables the customer to see the exact order and provides them the opportunity to stop the order process if something appears to be incorrect.

The number of lines showing on the display board at one time depends upon the capabilities of the installed hardware. If the order has more lines to display than the capacity of the display board, only the most recent lines appear on the display board, up to the maximum number supported.

Most of the time, messages written to the display board come from the connected terminal; however, it is common practice to operate two terminals during peak times, where one terminal captures the order, and the other terminal captures the payment. Then when business slows, one terminal is shut down and the remaining terminal captures the order and receives the payment.

Display Board types

Click the New drop-down arrow to select from a list of the typical display board types supported in the Aloha POS system. If the type of display board you use does not appear in the Type list box, contact Technical Support for help with selecting an appropriate display board type from the list. The list of typical display board types includes:

- AccuORDER 360
- AccuView
- PCD 101
- Delphi Standard
- Delphi E Series
- Delphi Standard Integrations
- AccuView Integrations
- OrderPoint Outdoor Display
- Summit Customer Order Display

Display Board quick tips:

- You cannot connect more than one display board to a terminal.
- To provide the ability to manually reroute the destination of orders to another display board from the FOH, add a Reroute Display Board button function to a FOH panel by selecting Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels.
- To add the ability to display a 'Your Total is...' message for each order, add a Display Order Total button function to a panel or script by selecting Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels.
- To enable the system to automatically activate a reroute at a certain time, create a Reroute Display Board event.
- A maximum of three display board records is allowed per site.



Reference

See the [Quick Service Screen Designer Guide](#) for more information on adding a 'Reroute Display Board' button and a 'Display Order Total' button to a FOH panel.



Note

See [Event Schedule](#) for more information on configuring a Reroute Display Board event.

Display Board tab

Use the Display Board tab to determine the number and name used to identify the display board, and to define how you use display boards at your establishment.

Group bar: Settings

Display active — Activates the display board and routes the display signal to the display board.
Documented Version: v12.3.

Display graphics — Enables the use of graphics on the display board. **Required Options:** You must select AccuView or Delphi E Series as the display board type to enable this option.

Display prices — Displays the item price on the display board. **Required Options:** You must select AccuORDER 360, AccuView, Delphi Standard, or Delphi E Series as the display board type to enable this option.

Hide zero tax — Suppresses the display of tax information when the value is zero. **Required Options:** You must select AccuORDER 360, AccuView, or Delphi E Series as the display board type to enable this option.

AccuOrder font — Defines the desired font for the AccuOrder display board. **Required Options:** You must select AccuORDER 360 as the display board type to enable this option.

Font for AccuView or Delphi E Series — Defines the desired font for the AccuView or Delphi E Series display boards. **Required Options:** You must select AccuView, or Delphi E Series as the display board type to enable this option.

Greetings message — Stipulates the desired greeting message text to appear on the display board. Type a maximum of 100 characters; however, the message truncates at the end of the message board line. Verify the length of the message visually before using the message in a live environment. The greeting message appears on the display board until the first menu item appears. **Required Options:** You must select AccuORDER 360, AccuView, or Delphi E Series as the display board type to enable this option.

Number of columns — Establishes the number of display units arranged in columns as installed in the display board. Valid entries range from 0 to 255, and is configured by the manufacturer. **Required Options:** You must select AccuORDER 360, AccuView, or Delphi E Series as the display board type to enable this option.

Number of rows — Establishes the number of display units arranged in rows as installed in the display board. Valid entries range from 0 to 255, and is configured by the manufacturer. **Required Options:** You must select AccuORDER 360, AccuView, or Delphi E Series as the display board type to enable this option.

Display order total when new order is selected — Sends a message to the Delphi E-Series and Delphi Standard interface to display the order total when you start a new order in the FOH. This option is useful in a 'rapid order and tender' environment. Use this option when you want to clear the total from the display board once the guest placing the order moves ahead to the pickup window. When cleared, the order total appears when you tender the check. **Required Option:** You must select Delphi Standard, or Delphi E Series as the display board type to enable this option. **Documented Version:** v12.3.

Consolidate items — Combines like items on the display board for consolidation. **Documented Version:** v12.3.

Group bar: Interfaces

To configure a display board to show mobile orders at wireless check in, you must associate the display board with a beacon and specify how long a mobile order appears on the display board.

Order display time (in seconds) — Enables mobile orders to appear on a display board for a set number of seconds, when the proximity beacon associated with the lane detects the customer device and alerts ATO to send the mobile order to the Aloha POS system and to the configured display board. The default value is 10 seconds.

Check in summary 1 through 4 — Identifies the beacon from which a mobile order check in alert is sent. These are free-form text fields and must match the entry in Takeout Configuration > Takeout Settings > Check In Summary tab > Release to Queue Options tab > 'Check in summary.'

Group bar: Connected to

Terminal — Indicates the terminal to which the display board attaches. If the terminal you select is already in use, an error message appears, and you must select a different terminal. **Required**

Options: You must select AccuORDER 360, AccuView, PCD 101, Delphi Standard, or Delphi E Series as the display board type to enable this option.

Port — Indicates the port on the terminal to which the display board is physically attached. When active, the display board signal routes to the specified port. **Required Options:** You must select AccuORDER 360, AccuView, PCD 101, Delphi Standard, or Delphi E Series as the display board type to enable this option.

IP address — Specifies the IP address to allow the display board to communicate. **Required Options:** You must select Delphi Standard Integrations, AccuView Integrations, or OrderPoint Outdoor Display as the display board type to enable this option. **Documented Version:** v12.3.

IP Port — Specifies the IP port to allow the display board to communicate. **Required Options:** You must select Delphi Standard Integrations, AccuView Integrations, or OrderPoint Outdoor Display as the display board type to enable this option. **Documented Version:** v12.3.

Group bar: Display orders from

Terminal — Indicates the terminal that sends orders to this display board. If the terminal you select is already in use, an error message appears, and you must select a different terminal. **Required**

Options: You must select AccuORDER360, AccuView, Delphi Standard, or Delphi E Series as the display board type to enable this option.

Group bar: Scrolling messages

Number of scroll messages — Specifies to use from none to three scrolling messages. The number you type determines the number of 'Scroll message #x' options that appear.

Scroll message #1 through Scroll message #3 — Stipulates the scrolling message text to appear on the display board. Type a maximum of 100 characters; however, the message truncates at the end of the message board line. Verify the length of the message visually before finalizing. **Required**

Options: 1) You must select AccuORDER360, AccuView, or Delphi E Series as the display board type to enable this option. **2)** You must type a number between one and three to enable this option.

Group bar: Delay time in seconds

Change due — Specifies how long, in seconds, the amount of change that is to be returned to the customer remains visible on the display board. Type a maximum of 255 seconds. **Required Options:** You must select PCD 101 as the display board type to enable this option.

Amount tendered — Specifies how long, in seconds, the amount of money received from the customer remains visible on the display board. Type a maximum of 255 seconds. **Required Options:** You must select PCD 101 as the display board type to enable this option.

Display Orders From tab

Use the Display Orders From tab to specify terminals that can send messages to the display board. This tab appears only when you select Delphi Standard Integrations or AccuView Integrations as the display board type.

Group bar: Display Orders From

Use the >> and << arrows to move terminals between the 'Available' list and the 'Included' list.

Drink Dispensers

Select **Maintenance > Hardware > Drink Dispensers** to access this function.

Drink dispensers make it possible to more accurately account for every liquor drink poured. This eliminates the potential for employees to over pour or forget to ring up a drink. It may also help when identifying other shrinkage methods such as spillage.

Set up the drink dispenser per the documentation included with it by its manufacturer. Remember that any drink dispenser ID (or PLU, as some companies may call them) must match an Item ID in the Aloha system. If the ID does not match, a message like 'Item ##### not found in database. Notify Manager' appears.

The following table shows the supported drink dispensers and their communication parameters:

Drink Dispenser	Baud	Parity	Data Bits	Stop Bits	Cable
Berg Liquor System	2400	Even	7	1	
EasyBar Liquor System	9600	None	8	1	Straight through

Drink Dispenser types

Click the New drop-down arrow to select from a list of drink dispenser types currently supported in the Aloha POS system.

Drink Dispensers tab

Use the Drink Dispensers tab to determine the number and name used to identify the record, and to establish the communication parameters. You establish your own naming conventions; however, we suggest the drink dispenser name be descriptive of the hardware or reflect its physical location.

Group bar: Settings

Name — Identifies the drink dispenser.

Terminal — Indicates the terminal to which the drink dispenser connects.

Port — Indicates the port on the terminal to which the drink dispenser is physically attached.

Employees

Select **Maintenance > Labor > Employees** to access this function.



Note

Effective with Aloha Configuration Center/Aloha Manager v18.6, the Employees function is split into two functions: Employees and Users. Upon upgrade to CFC v18.6, the New drop-down list is no longer available in the Employees function. You continue to use Employees to configure and manage employees who log in to the FOH in the POS but you use the Users function to configure and manage employees requiring above store access or POS and above store access, also referred to as BOH access. Any employee designated as 'Above store only' or 'POS and above store only' is automatically migrated to the new Users function.

The Employees function allows you to add and maintain employee data, such as the employee birth date, Social Security number, employment status, hire date, and more.

Certain information in the Employees function is restricted, based on the security role assigned to an employee, to prevent disclosure of private or personal information. For example, a security role for an employee might restrict access to the Social Security number, address, pay rate, and other personal information for all employees in the system.

Employee types

When you click the New drop-down arrow, available in CFC versions earlier than v18.6, and select an employee type from the list box, your selection determines what the employee can access in the system, and the tabs and options that appear in the Employees function for that employee.

POS only allows the employee to perform Front-of-House (FOH) functions only.

Above store only allows the employee to perform Back-of-House (BOH) configuration management tool functions only.

POS and above store allows the employee to perform both FOH functions and BOH configuration management tool functions.

Employees quick tips:

There are several rules or tips to follow when you add a new employee to the database:

- If you set the employee to 'Above store only' or 'POS and above store,' the Above Store Settings tab becomes available for you to assign the employee a BOH user name and security role.
- If you assign a security role to an employee, your security role must have at least the same rights as the security role you want to assign to the employee.
- You cannot edit your own security role.
- You cannot delete your own employee record.

- You can reset and assign a temporary BOH password for an employee on the Above Store Settings tab. The Aloha POS system prompts for a new password the next time the employee logs in to the BOH.
- You can reset your own password, if your security role has the appropriate rights assigned to it.

Employee tab

Use the Employee tab to enter general employee identification information, such as the Social Security number, name, and address of an employee, and more.

Group bar: Personal information

POS Employee number — Identifies each employee in the Aloha POS system. The employee uses this number to log in to the FOH system, and to perform certain functions requiring manager approval to continue. The system validates no other employee has the same employee number.

When you add a new employee, the system defaults to the next unassigned number, based on the number of the previous record. For example, if number 105 appeared previously on the Employee tab, 106 appears as the next number. If 106 is already in use, 107 appears as the next number. If you want to select a different number, click the **ellipsis (...)** next to 'Number' to display the Number Assignment dialog box. We suggest you create employee numbers in a numbering scheme designed for organization and manageability. You can group employee numbers by job function, such as:

100-199	Management positions
200-499	Counter staff
500-599	Prep employees
600-799	Kitchen employees
800-899	Other employees
900-999	Training positions

Using this numbering scheme, you can easily associate an employee to a specific position within the organization.

System access — Indicates whether the employee has access to FOH, BOH, or both. You can change the system access for an employee from 'POS only' to 'POS and above store' and from 'Above store only' to 'POS and above store.' This option is not visible for CFC v18.6 and later.

Social security number — Specifies the employee Social Security number (SSN). When you enter an SSN, the Aloha POS system compares it to current employee records, and to stored numbers of terminated employees who are not eligible for rehire. The system also verifies the SSN is valid. If the SSN is not valid or if it conflicts with another record, both an error indicator and error message

appear. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'SSN/Identification' under the 'POS Employee Fields' group bar to make this option mandatory.

Note

If you do not have the appropriate access rights (as defined in the Security Roles function), you cannot view the SSN for an employee record.

Last name — Specifies the last name of the employee. Type a maximum of 30 characters. A warning message appears when you attempt to save the new employee record, if there is an existing employee with the same first and last name.

First name — Specifies the first name of the employee. Type a maximum of 30 characters. A warning message appears when you attempt to save the new employee record, if there is an existing employee with the same first and last name. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'First name' under the 'POS Employee Fields' group bar to make this option mandatory.

Middle name — Specifies the middle name of the employee. Type a maximum of 30 characters. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Middle (name/initial)' under the 'POS Employee Fields' group bar to make this option mandatory.

Nickname — Specifies the name printed on the chit and guest check. Use this option to use an abbreviated employee name or a nickname on customer checks. If left blank, the Aloha POS system uses the first name of the employee.

Birth date — Specifies the employee date of birth. Type this option in mm/dd/yyyy format. If you type the employee birth date, the system greets the employee with a happy birthday message, when that person logs in on their birthday. If you type a birth date, the year must be later than 1901.

Related Options: You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Birthdate' under the 'POS Employee Fields' group bar to make this option mandatory.

Export ID — Specifies the employee identification number that is recognized by third-party software for electronic payroll processing. For example, enter the employee ADP number for an ADP interface.

Address 1 through Address 4 — Specifies the employee home address. Type a maximum of 30 characters for Address 1, and 25 characters for Address 2 through Address 4. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Address 1' under the 'POS Employee Fields' group bar to make the address mandatory.

City/town — Shows the city in which the employee lives. Type a maximum of 20 characters.

Related Options: You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'City/town' under the 'POS Employee Fields' group bar to make this option mandatory.

State — Shows the state in which the employee lives. Type a maximum of 15 characters. **Related**

Options: You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'State' under the 'POS Employee Fields' group bar to make this option mandatory.

County — Specifies the specific territorial region (county, parish) where the employee resides.

Postal code — Specifies the ZIP code or Canadian postal code for the employee home address.

Type a maximum of 25 characters. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Postal code' under the 'POS Employee Fields' group bar to make this option mandatory.

Email address — Specifies the employee email address, if known.

Phone number — Specifies the contact telephone number for the employee. Type a maximum of 26

characters. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Telephone' under the 'POS Employee Fields' group bar to make this option mandatory.

Prefers qwerty keyboard — Indicates that the employee prefers the standard QWERTY typewriter keyboard. Clear this option to display an alphabetic keyboard layout. These keyboards appear on order entry touch screens for data entry, such as typing the name for a bar tab. Employees who know how to type usually prefer the QWERTY layout.

Group bar: User level

User level — Allows you to assign a user level to an employee to control access to payroll information in the Employees function, Users function, Terminated Employees function, and any reports that publish payroll information. Assigning a user level restricts that user level from editing or viewing restricted information on an employee record with a user level equal to or greater than the current level. Printed or on-screen reports do not show payroll information for any levels greater than or equal to the current user level. Valid user levels include User level 1 through User level 9. User level 9 (Admin) has the highest level of access; and user level 1 (Least Privileged) has the minimum level of access. **Required Options:** Access Maintenance > Business > Installed Products (CFC users access Maintenance > Business > Global Administration) and select 'Enable User levels' under the 'User Levels' group bar to expose this option. This option does not appear when logged in as a corporate employee; it is available only when logged in as a global employee. **Required Versions:** Aloha POS v15.1.53 and CFC v20.10.

Group bar: POS security options

Use the POS security options to configure the method your employees use to clock in, log in, and receive manager approval for required transactions. This method is hardware dependent and you select either magnetic cards or fingerprint scanners, but not both.

Use magnetic cards — Requires the employee to use a magnetic card when logging in to the FOH, and when accepting credit cards for payment. The employee cannot manually enter their password or credit card numbers. Although an employee can use a mag card if you clear 'Use magnetic cards,' you must select this option to *require* an employee to use their mag card with the Aloha POS system.

Required Options: You must access Maintenance > Business > Store > Store Settings tab > Security group and select Optional or Required as the 'Password method' under the 'POS Password' group bar to enable this option.

Magnetic card password — Enables you to assign and activate a password for a magnetic card for a specific employee and then physically slide the magnetic card through a card reader to set the password. **Required Options:** You must select 'Use magnetic cards' to enable this option.

Use fingerprint scanner for clock in — Requires employees to place their thumb on fingerprint scanner hardware to clock in. Use this option for employees who must clock in, but do not enter orders, such as kitchen staff. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Default Values tab and select 'Use fingerprint scanner for clock in' under the 'Employee fields' group bar to set the default value for this option to true.

Use fingerprint scanner for login and manager approval — Requires employees to place their thumb on fingerprint scanner hardware to log in or to obtain manager approval on certain transactions. Use this option for order entry employees who log in frequently and for managers who must approve transactions. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Default Values tab and select 'Use fingerprint scanner for login and manager approval' under the 'Employee fields' group bar to set the default value for this option to true.

Use Dallas Key — Indicates that employees may use a Dallas Key to log in or clock in. A Dallas Key is a specific type of hardware you can use in conjunction with key readers to perform security validation. You can use Dallas Keys as the sole security verification device or in combination with magnetic cards or fingerprint scanners, per your business needs and hardware requirements.

Dallas Key password — Allows you to set or change the password for a Dallas Key. **Required Options:** You must select 'Use Dallas Key' to enable this option.

Status tab

The Status tab provides information regarding whether an employee is actively working at a site.

Group bar: Employment status

Employment status — Indicates the current work status of the employee.

Active — Indicates the employee currently works.

Pending — Indicates a new employee awaiting approval before they can become an active employee. **Required Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'New hires require approval' under the 'Employee maintenance' group bar to expose this option.

Terminated — Indicates the employee does not currently work. If you select Terminated, all options for the employee become unavailable except 'Employment status,' and the 'Termination' group bar and 'Transfer' group bar appear.

Job status — Indicates whether the employee is full-time, part-time, hourly, salary exempt, or salary non-exempt. The default is full-time. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Job status' under the 'POS Employee Fields' group bar to make this option mandatory.

Start date — Indicates the initial hire date of the employee. Type the date in mm/dd/yyyy format or click the drop-down arrow to select the start date from the calendar. This may not be the first day the employee worked. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Start date' under the 'POS Employee Fields' group bar to make this option mandatory.

Group bar: Break exemption

Employee waives 'Consent' breaks — Does not prompt an employee to waive their meal period break, when using shift and break rules. An employee can sign legal documentation to always waive consensual meal period breaks, if the break times are still within the requirements of the shift and break rules. By selecting this option, the employee never receives the option to waive a consensual meal period break. If the condition becomes mandatory, and creates a penalty pay record of 'Meal Period 1 Mandatory' or 'Meal Period 2 Mandatory' in the Pay Adjustment function, compensation is awarded automatically.

Exempt from minor break rules — Indicates the employee is exempt from break rules mandated for minor employees.

Group bar: Termination

This group bar appears when you set the employment status to 'Terminated' and the system access type assigned to the employee is not 'Above store only.'

Reason — Indicates the specific reason the employee no longer works for the company. **Required Options:** You must select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option. **Related Requirements:** Access Maintenance > Labor > Termination Reasons to create termination reasons.

Last day — Indicates the last date the employee worked. Type the date in mm/dd/yyyy format or click the drop-down arrow to select the date from the calendar. **Required Options:** You must select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option.

Eligible for rehire — Indicates the employee is eligible for rehire. **Required Options:** You must select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option.

Explanation — Optionally expands on the reason for the employee termination. Type a maximum of 40 characters. **Required Options:** You must select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option.

Expected return date from leave of absence — Indicates the date you expect the employee to return to work after taking an approved leave of absence. Type the date in mm/dd/yyyy format or click the drop-down arrow to select the date from the calendar. **Required Options:** You must select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option.

Group bar: Transfer

This group bar appears when you set the employment status to 'Terminated' and the system access type assigned to the employee is not 'Above store only.'



Caution

To comply with certain state laws and labor codes, always terminate employees instead of deleting them from the Aloha system.

Transfer to unit — Indicates the store number of another restaurant within the company to which the employee is transferring. **Required Options:** You must access Maintenance > Labor > Employees > Status tab and select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option.

Will employee move — Indicates the employee transfer requires the employee to move. **Required Options:** You must select 'Terminated' in 'Employment status' under the 'Employment status' group bar to enable this option.

Jobcodes tab

Use the Jobcodes tab to assign job codes, access levels to an employee. Job codes describe the available jobs in the Aloha POS system, and access levels determine whether an employee can do it.

Additionally, a 'Pay rates' group bar appears at the bottom of the tab for the selected job code. Click add to define when a pay rate is in effect for the job code. Pay rates appear on only selected reports.



Note

You must first define the job codes and POS access levels before you can assign them to an employee.

Group bar: Jobs

Jobcode — Indicates the job position you want to assign to an employee. The job code determines the set of functions the employee performs on the Aloha POS system. You can assign up to 10 job codes for each employee. If an employee works several job positions, you can assign multiple job codes to the employee. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Job code' under the 'POS Employee Fields' group bar to make this option mandatory. **Related Requirements:** Access Maintenance > Labor > Jobcodes to define each job position under which an employee can log in.

Access level — Determines the set of Aloha POS system functions the employee can perform without manager intervention. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Access level' under the 'POS Employee Fields' group bar to make this option mandatory. **Related Requirements:** Access Maintenance > Labor > Pos Access Levels to define access levels and determine the functions each access level can perform.

Current pay rate — Contains the base-level hourly rate for the associated job code to the left. Enter the rate as a decimal number or in fractional cents. **Related Options:** Access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Pay rate' under the 'POS Employee Fields' group bar to make this option mandatory.

Group bar: Pay rates

Effective date — Specifies the date the pay rate goes into effect.

Pay rate — Contains the base-level hourly rate for the associated job code. Enter the rate as a decimal number or in dollars and cents.

End date — Specifies the date the pay rate is no longer in effect.

Modified date — Indicates the date the new pay rate was added.

Delivery tab

Use the Delivery tab to specify delivery fees, the driver license expiration date, and insurance expiration date for an employee. **Related Options:** This tab is not available for employees designated as 'Above store only.'

Group bar: Delivery information

Driver fee amount per order — Defines a dollar amount, per delivery order, the driver is reimbursed on the driver checkout.

Driver fee percent — Defines the percentage of the tippable-sales amount the driver is reimbursed on the driver checkout.

Driver fee per mile — Defines the dollar per mile reimbursement the driver receives for each delivery. This option is for use with 'Delivery/Frequent Buyer.' No equivalent functionality exists in Aloha Takeout.

Drivers license expiration date — Indicates the date the employee driver license expires. Type the date in mm/dd/yyyy format or click the drop-down arrow to select the date from the calendar. The default value is 00/00/0000, which disables the expiration functionality.

Insurance expiration date — Indicates the date on which the automobile insurance expires for the employee. Type the date in mm/dd/yyyy format or click the drop-down arrow to select the date from the calendar. You can not assign a driver whose insurance has expired to an order without manager override. The default value is 00/00/0000, which disables the expiration functionality.



Reference

Refer to the [Aloha Takeout Implementation Guide - HKS326](#) for more information.

Tax tab

Use the Tax tab to enter employee information for tax filing purposes.

Group bar: Tax information

Marital status — Specifies the marital status of the employee. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Marital status' under the 'POS Employee Fields' group bar to make this option mandatory.

Number of dependents — Indicates the number of dependents the employee claims. **Related Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Number of dependents' under the 'POS Employee Fields' group bar to make this option mandatory.

Gender — Indicates if the employee is male or female.

Custom Settings tab

Use the Custom Settings tab to track additional user-definable information.

Group bar: Other employee codes

Undefined Code #1 through Undefined Code #5 — Captures additional information about the employee. Use undefined employee codes to track additional information, such as if the employee is a smoker, owns a car, or other information useful for your establishment. **Related Options:** 1) To define custom text to appear in place of the 'Undefined code #n' label for these options, access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and edit 'Undefined employee code 1 label text' through 'Undefined employee code 5 label text' under the 'Employee maintenance' group bar, as necessary. For example, to track the number of smokers you employ, replace 'Undefined employee code 1 label text' with 'Smoker.' The word 'Smoker' appears in Employee Maintenance, in place of 'Undefined code #1.' The Aloha POS system does not include this information on any Aloha reports. 2) You must access Maintenance > Business > Additional Features (Corporate Administration) > Required Employee Fields tab and select 'Undefined code #1' through 'Undefined code #5' under the 'POS Employee Fields' group bar to make these options mandatory.

Above Store Settings tab

The Above Store Settings tab enables you to configure the login information for an employee that needs access to the system. The Above Store Settings tab appears only when you are on a version of CFC earlier than v18.6 and you select 'POS and above store,' or 'Above store only' as the employee type.



Note

Effective with CFC v18.6, the Above Store Settings tab moved to the Maintenance > Labor > Users function. Once you upgrade to this version of CFC, you maintain FOH employees in the Employees function, and POS and above store, or above store only, users in the Users function.

Group bar: Above store settings

Username — Identifies the user ID the employee uses to log in to the system. Type a maximum of 25 characters.

Security role — Dictates the level of access an employee has when logged in to the system. If you assign a security role to an employee, your security role must have at least the same rights as the security role you want to assign the employee. **Related Requirements:** You define security roles in Maintenance > Labor > Security Roles.

Reset password — Clears the stored password the employee uses to log in to the BOH, and prompts you to enter a 3 to 12 character temporary password for the employee. **Note:** You must save your changes or the temporary password will not take effect. The next time the employee logs in to the BOH with the temporary password, they receive a prompt to enter a new password. **Required**

Options: 1) To reset a BOH password, access Maintenance > Labor > Security Roles > POS tab and verify 'Reset CFC Password' is selected for your security role under the 'Maintenance > Labor' group bar.

Change password — Enables you to create a new BOH password for the employee. **Related**

Options: To reset a BOH password, access Maintenance > Labor > Security Roles > POS tab and verify 'Reset CFC Password' is selected for your security role under the 'Maintenance > Labor' group bar.

The new password must meet the following requirements:

- a. Must contain 7 to 25 characters.
- b. Has not been used in the previous four passwords.
- c. Must *not* contain the employee user name, first name, last name, middle name, nick name, or ID number.
- d. Must contain a number (0-9).
- e. Must contain at least two of the following three character groups:

English uppercase (A through Z)

English lowercase (a through z)

Special character (i.e., ! @ # \$ % ^ & * () _ +)

Example of a valid password: Nojog1!

Example of an invalid password: PORSCHE

Event Schedule

Select **Maintenance > System Settings > Event Schedule** to access this function.

Events enable you to automate many of your routine Aloha POS system tasks, such as the menu that appears for a specific job group, printer reroutes, messages that appear, tip-share percentages, promotions, price changes, and more. An event schedule works in conjunction with activation schedules to control when one or more events automatically recur at a store. When you add an event to an event schedule, you stipulate the activation schedule for the event to use. The activation schedule you select determines if the event runs daily at start-of-day, on a specific date, such as Labor Day at start-of-day, or weekly starting at 5:00 p.m. every Thursday. Analyze your existing activation schedules to determine if a schedule with the desired recurrence interval and start time already exists for activating the event. If yes, use that activation schedule to activate the event; if not, create a new activation schedule to meet your needs. Then add the event to an event schedule, assign an activation schedule to the event, and, if needed, further stipulate when the event is active by entering a start and end date for the event.

There are four activation schedule types, and the priority with which the system activates them, from lowest to highest, is as follows:

- Daily
- Weekly
- Monthly
- Specific Date

Additionally, when multiple events with the same activation schedule type appear in an event schedule, the event closest to the bottom of the event schedule overrides similar events that appear above it.

The following examples illustrate the order of priority the Aloha POS system uses to activate an event, based on the activation schedule assigned to the event.

Example 1:

Activate Price Change event uses the 'Specific date' activation schedule type set for December 25 start time of 11:00 a.m. to set price of hamburger to \$1.50.

Activate Price Change event uses the 'Daily' activation schedule type with a start time of 11:00 a.m. to set price of hamburger to \$3.00.

Result: The Aloha POS system activates the \$1.50 hamburger price change on Christmas day, because the activation schedule type of 'Specific date' has a higher priority than any other activation schedule type.

Example 2:

Activate Price Change event uses the 'Weekly' (Monday selected) with a start time of 11:00 a.m. to set price of hamburger to \$3.00.

Activate Price Change event uses the 'Weekly' (every day selected) with a start time of 11:00 a.m. to set price of hamburger to \$4.00.

Result: The Aloha POS system activates the \$4.00 hamburger price change, because it is the last event added to the event schedule.

Event quick tips:

There are several rules or tips to follow when you configure events in the system:

- When the system activates an event using the default activation schedule of 'Always,' the event remains active until the End-of-Day (EOD) occurs and a new business day starts, at which time normal operations resume, unless you also add an event to disable the function and select an activation schedule with a start time prior to the EOD.
- When you add an event to an event schedule, the activation schedule defaults to 'Always.'
- If you need to end an event prior to when the End-of-Day occurs, you can use another event to disable it.
- Each event you add to an event schedule uses an activation schedule to determine the frequency with which it recurs. There are four activation schedule types, and the hierarchy with which the system activates them for an event is: Specific Date overrides Monthly, Weekly, and Daily, Monthly overrides Weekly and Daily, and Weekly overrides Daily.
- If an event schedule contains two or more events with the same start time and activation schedule type, the event closest to the bottom of the event schedule overrides similar events that appear above it in the schedule.
- The date of business in the Front-of-House (FOH) is the operational date in the Aloha POS system. If the date of business in the FOH and the Back-of-House (BOH) are not the same, events do not activate correctly.

Event Schedule tab

Use the Event Schedule tab to define basic identification information for the event, including number and name.

Group bar: Identification

Name — Identifies the event schedule. Type a maximum of 50 characters.

Events tab

The Events tab enables you to add one or more events to an event schedule. When you add an event, an event row appears under the 'Events' group bar, for you to schedule the event. Additionally, the

event type options appear under a new group bar at the bottom of the Events tab, for you to configure the selected event type.

Group bar: Events

Description — Identifies the event name. This option is 'read only.'

Activation schedule — Designates the specific schedule you want to use to determine how often the event recurs at the store, and the time the event becomes active. **Related Requirements:** You create activation schedules in Maintenance > System Settings > Activation Schedules.

Start time — Indicates the time to activate the event at the store. This option is 'read only,' and populates from the selected activation schedule.

Start date — Indicates the date you want the event to become active at the store.

End date — Indicates the date you want the event to no longer be active at the store.

Event types

The following section provides an alphabetical listing with a description of each event type available for selection when you click the down-arrow next to 'Add.'

Activate Additional Charges

Use Activate Additional Charges to add a specific amount or percentage to each guest check only during a specific time of day. To disable the additional charge before the EOD occurs, create another Activate Additional Charges event, clear 'Active,' and select an activation schedule that starts at the desired end time. **Related Requirements:** Access Maintenance > Business > Store > Store Settings tab > Financials group and configure the additional charge and clear 'Apply additional charges' under the 'Additional Charges' group bar; otherwise, the system adds an additional charge to every guest check throughout the day instead of adding it only during the time the Activate Additional Charge event is active.

Active — Adds the additional charge only during the time the event is active instead of applying the additional charge to every guest check throughout the day

Activate Comp

Use Activate Comp to make a comp available on specific dates and times. To disable the comp before the EOD process occurs, create another Activate Comp event, clear 'Active,' and select an activation schedule that starts at the desired end time. **Related Requirements:** You configure comps in Maintenance > Payments > Comps.

Comp — Designates the comp to make active.

Active — Activates the comp.

Activate Floating Dashboard By Terminal

Use Activate Floating Dashboard By Terminal to designate a dashboard to appear in place of the floating logo and to specify the terminals on which it is to appear. To disable the dashboard before the EOD process occurs, add the Disable Floating Dashboard By Terminal event to an event schedule and select an activation schedule that starts at the desired end time. Refer to [Disable Floating Dashboard By Terminal](#). **Related Requirements:** You configure dashboard panels in Maintenance > Screen Designer.

Dashboard screen — Designates the dashboard screen to make active.

Terminal — Designates the specific terminals on which the dashboard is to appear. 'All terminals' is a valid option.



Reference

Refer to the [Dashboard Feature Focus Guide - HKS323](#) for more information.

Activate Guest Experience Campaign

Use Activate Guest Experience Campaign to make a campaign active. To disable the campaign before the EOD process occurs, add the Disable Guest Experience Campaign event to an event schedule and select an activation schedule that starts at the desired end time. Refer to [Disable Guest Experience Campaign](#). **Related Requirements:** You configure guest experience campaigns in Maintenance > Guest Experience > Campaign Rulebook.

Guest Experience Campaign — Designates the campaign to make active.



Reference

Refer to the [Campaign Rulebook Feature Focus Guide - HKS324](#) for more information.

Activate Item Cook Time Override

Use Activate Item Cook Time Override to override item cook times during high traffic times or special events. Activate an override event to increase or decrease the cook time of an item, such as when the number of items ordered exceeds the capacity of a piece of kitchen equipment during busy meal periods or when additional scheduled staff increases productivity. To disable the override to item cook times before the EOD process occurs, create another Activate Item Cook Time Override event, clear 'Active,' and select an activation schedule that starts at the desired end time. **Related Requirements:** You configure overrides under the 'Cook Time Assignments' group bar on the Item Cook Time tab in Aloha Kitchen > Maintenance > Menu > Item Cook Time Overrides.

Item cook time override — Designates the item cook time assignment to make active.

Active — Activates the item cook time override.

Activate Layout Override

Use Activate Layout Override to use a custom layout in place of a standard layout for the printing of a chit or guest check. To disable a custom layout before the EOD process occurs, add the Disable Layout Override event to an event schedule and select an activation schedule that starts at the desired end time. Refer to [Disable Layout Override](#). **Related Requirements:** You configure a custom layout in Maintenance > Hardware > Print Designer.



Reference

Refer to the [Print Designer Feature Focus Guide - HKS375](#) for more information.

Override layout type — Designates the type of chit or guest check for which to override the standard layout. Available options include 'Guest check,' 'Kitchen chit,' 'Expo chit,' 'Tray chit,' and 'Order taker chit.'

Override layout selection — Specifies the custom layout created in Print Designer to use in place of the standard layout.

Activate Movie

Use Activate Movie to play a movie when an employee clocks in to the system. To disable the playing of a movie before the EOD process occurs, create another Activate Movie event, clear 'Active,' and select an activation schedule that starts at the desired end time.

Movie — Designates the movie to make active.

Activate — Activates the movie.

Activate Panel Button

Use Activate Panel Button to control when one or more buttons belonging to a specific tag group appear on a panel. To disable the buttons in the tag group from appearing on the panel before the End-of-Day occurs, create another Activate Panel Button event, select 'Set button as inactive' and select an activation schedule that starts at the desired end time. **Related Requirements:** You configure tag groups in Maintenance > System Settings > Tags. You assign each button to a tag group in the Properties dialog box for the button in Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels

Tag — Designates the tag group to make active.

Set button as inactive — Disables the buttons belonging to the tag group you made active using an Activate Panel Button event scheduled for earlier in the day.

Activate Performance Measure

Use Activate Performance Measure to make a performance measure active on specific dates and times. To disable the performance measure before the EOD process occurs, create another Activate

Performance Measure event, clear 'Active,' and select an activation schedule that starts at the desired end time. **Related Requirements:** You configure performance measures in Maintenance > Labor > Performance Measures.

Performance measure — Designates the performance measure to make active.

Active — Activates the performance measure.

Activate Price Change

Use Activate Price Change to schedule temporary price changes. You can stipulate a specific revenue center in which to make the price change active or make it active for all revenue centers. To disable the price change before the EOD process occurs, add the Disable Price Change event to an event schedule and select an activation schedule that starts at the desired end time. Refer to [Disable Price Change](#). **Related Requirements: 1)** You configure price changes in Maintenance > Pricing > Price Changes. **2)** You configure revenue centers in Maintenance > System Settings > Revenue Center.

Price change — Designates the price change to make active.

Revenue center — Specifies the revenue center for which the price change is in effect. 'All' is a valid option.

Activate Promo

Use Activate Promo to make a promo available on specific dates and times. You can stipulate a specific revenue center in which to make the promo active or make it active for all revenue centers. To disable the promo before the EOD process occurs, create another Activate Promo event, clear 'Active,' and select an activation schedule that starts at the desired end time. **Related Requirements:** You configure promos in Maintenance > Payments > Promos.

Promo — Designates the promo to make active.

Active — Activates the promo.

Revenue center — Specifies the revenue center for which the promo is in effect. 'All' is a valid option.

Activate Store Specific Item

When using Centralized Data Management (CDM), use Activate Store Specific Item to allow the central site to send the item to select stores and make the item active at a specific time. You must configure the item with a preceding tilde (~) in 'Short name.' **Related Requirements:** You configure items in Maintenance > Menu > Items.

Item to activate — Designates the item to activate at the store.

New item name — Allows you to identify the item with a name other than the name in the item configuration.

Activate Tender

Use Activate Tender to make a tender available on specific dates and times, such as gift certificates that you only accept during evening hours. To disable the tender before the EOD process occurs, create another Activate Tender event, clear 'Active,' and select an activation schedule that starts at the desired end time. **Related Requirements:** You configure tenders in Maintenance > Payments > Tenders.

Tender — Designates the tender to make active.

Active — Activates the tender.

Button position — Specifies the button position on which the tender is to appear on the FOH tender screen.

Disable Floating Dashboard By Terminal

Use Disable Floating Dashboard by Terminal to stop a dashboard from appearing in place of the floating logo on the designated terminals, if you want it to stop appearing before the EOD process occurs. Select an activation schedule that starts at the desired end time. Refer to [Activate Floating Dashboard By Terminal](#). **Related Requirements:** You configure dashboard panels in Maintenance > Screen Designer.

Terminal — Designates the specific terminals on which the dashboard is to no longer appear. 'All terminals' is a valid option. If left blank, the dashboard no longer appears in place of the floating logo on all terminals.



Reference

Refer to the [Dashboard Feature Focus Guide - HKS323](#) for more information.

Disable Guest Experience Campaign

Use Disable Guest Experience Campaign to end a campaign, if you want the campaign to end before the EOD process occurs. Select an activation schedule that starts at the desired end time. Refer to [Activate Guest Experience Campaign](#). **Related Requirements:** You configure guest experience campaigns in Maintenance > Guest Experience > Campaign Rulebook.



Reference

Refer to the [Campaign Rulebook Feature Focus Guide - HKS324](#) for more information.

Guest Experience Campaign — Designates the active campaign to disable.

Disable Layout Override

Use Disable Layout Override to end an override of a custom layout being used in place of a standard layout for the printing of a chit or guest check, if you want the override to end before the EOD

process occurs. Refer to [Activate Layout Override](#). **Related Requirements:** You configure a custom layout in Maintenance > Hardware > Print Designer.

Override layout type — Designates the type of chit or guest check for which to disable the override and return to the standard layout. Available options include 'Guest check,' 'Kitchen chit,' 'Expo chit,' 'Tray chit,' and 'Order taker chit.'

Override layout selection — Specifies the active layout to disable.



Reference

Refer to the [Print Designer Feature Focus Guide - HKS375](#) for more information.

Disable Price Change

Use Disable Price Change to disable a price change, if you want the price change to end before the EOD process occurs. Refer to [Activate Price Change](#). **Related Requirements:** You configure price changes in Maintenance > Pricing > Price Changes

Price change — Designates the price change to disable.

Revenue center — Specifies the revenue center for which the price change is no longer in effect. 'All' revenue centers is a valid option.

Disable Void Reason

Use 'Disable Void Reason' to make a void reason unavailable on specific dates and times. 'None' is a valid option. **Related Requirements:** You configure void reasons in Maintenance > System Settings > Void Reasons.

Void reason — Designates the void reason to disable.

End of Day

Use End of Day to schedule the EOD process to occur during a slow time of operation, such as while the establishment is closed. You manually invoke the EOD process, using the End of Day button on the FOH screen. **Related Requirements:** To allow an employee to invoke the EOD process on demand, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'End of day' under the System group bar, then assign the access level to the employee.

Override Video Setting by Revenue Center or Terminal

Use Override Video Settings by Revenue Center or Terminal to designate a video display method to use for a specific revenue center or terminal. To revert to the original video settings before the EOD process occurs, add another Override Video Settings by Revenue Center or Terminal event, select 'None' in Override by,' and select an activation schedule that starts at the desired end time. **Related Options: 1)** Selecting Revenue Center from 'Override by' enables the 'Revenue center' option. **2)** Selecting Terminal from 'Override by' enables the 'Terminal' option.

Override by — Specifies whether to override the current option by a revenue center or terminal. 'None' is a valid option.

Revenue center — Designates the revenue center for which to override the display method.

Terminal — Designates the terminal for which to override the display method.

Display option — Designates the new display method to use for displaying the orders. Available methods include 'Use video queue settings,' 'Display items as entered,' 'Display one behind,' and 'Display items when ordered.'

Reroute Display Board

Use Reroute Display Board to reroute item information from one display board to another. To revert to the original routing before the EOD process occurs, add another Reroute Display Board event, designate the original display board as the target display board, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define display boards in Maintenance > Hardware > Display Boards.

Display board — Designates the target display board.

Display from terminal — Designates the display board from which to route orders.

Reroute Printer

Use Reroute Printer to print orders and items to a printer other than the printer to which they are originally assigned, for such things as when a station closes. To revert to the original printer before the EOD process occurs, add another Reroute Printer event, switch the 'from' and 'to' printers, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define printers in Maintenance > Hardware > Printers.

From printer — Designates the printer from which to route the printing of orders and items.

To printer — Designates the target printer.

Reroute Printer Group

Use Reroute Printer Group to print orders and items to a printer group other than the printer group to which they are originally assigned, for such things as when a station closes. To revert to the original printer group before the EOD process occurs, add another Reroute Printer Group event, switch the 'from' and 'to' printer groups, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define printer groups in Maintenance > Hardware > Printer Groups.

From printer group — Designates the printer group from which to route the printing of orders and items

To printer group — Designates the target printer group.

Reroute Printer Group by Terminals

Use Reroute Printer Group By Terminals to print orders and items coming from a specific terminal to a printer group other than the printer group to which they are originally assigned. To revert to the original routing before the EOD process occurs, add another Reroute Printer Group By Terminal event, switch the 'from' and 'to' printer groups, and select an activation schedule that starts at the desired end time. **Related Requirements: 1)** You define printer groups in Maintenance > Hardware > Printer Groups. **2)** You define terminals in Maintenance > Hardware > Terminals.

Terminal — Designates the terminal from which the orders to reroute generate.

From printer group — Designates the printer group from which to route the printing of orders and items from the specified terminal.

To printer group — Designates the target printer group.

Reroute Secondary Taxes by Revenue Center

Use Reroute Secondary Taxes by Revenue Center to begin charging a secondary tax on orders originating from a designated revenue center. To discontinue charging the secondary tax on orders originating from a designated revenue center before the EOD process occurs, add another Reroute Secondary Taxes by Revenue Center event to the event schedule, switch the 'from' and 'to' secondary taxes, and select an activation schedule that starts at the desired end time. **Related Requirements: 1)** You define secondary taxes in Maintenance > Taxes > Tax Type. **2)** You define revenue centers in Maintenance > System Settings > Revenue Center.

Revenue center — Designates the revenue center from which the orders to begin charging the secondary tax generate.

From secondary tax — Designates the secondary tax to no longer charge on orders originating from the designated revenue center. 'None' is a valid option

To secondary tax — Designates the secondary tax to begin charging on orders originating from the designated revenue center. 'None' is a valid option.

Reroute Tax

Use Reroute Tax to change from charging one tax at a store to charging another tax at that store. The Reroute Tax event type enables you to create and assign a generic tax ID to items, without it having to be specific to a store. You then create Reroute Tax events that are specific to a store. To discontinue charging the secondary tax on orders originating from a designated revenue center before the EOD process occurs, add another Reroute Secondary Taxes by Revenue Center event to the event schedule and select an activation schedule that starts at the desired end time. **Related Requirements:** You define taxes in Maintenance > Taxes > Tax Type.

From tax — Designates the generic tax ID.

To tax — Designates the tax ID for the area

This event enables you to set up and assign generic tax IDs to all items, regardless of the tax assessed for a specific area, and then change from the generic tax ID to the correct tax ID for the area. Use 'From tax' to specify the generic tax ID and 'To tax' to specify the correct tax ID for the area.

To use this feature, create tax records to use as default taxes, using a naming convention of your choice. See the following list for suggestions.:

- 1) Default Food
- 2) Default Liquor
- 3) Default Beer
- 4) Default Wine
- 5) Default Retail
- 6) Default Inclusive Food
- 7) Default Inclusive Liquor
- 8) Default Inclusive Beer
- 9) Default Inclusive Wine
- 10) Default Inclusive Retail
- 11) Default Secondary Food
- 12) Default Secondary Liquor
- 13) Default Secondary Beer
- 14) Default Secondary Wine
- 15) Default Secondary Retail

Reserve tax records 16-20 for special taxes, such as a tax on the To Go order mode.

Reroute Video Group

Use Reroute Video Group to send orders and items configured to appear on the monitors in one video group to appear on the monitors in another video group. To revert to the original routing before the EOD process occurs, add another Reroute Video Group event, switch the 'from' and 'to' video groups, and select an activation schedule that starts at the desired end time. **Related**

Requirements: You define video groups in Maintenance > Hardware > Video Groups.

From video group — Designates the video group containing the monitors from which the orders to reroute currently appear.

To video group — Designates the target video group.

Reroute Video Group By Terminal

Use Reroute Video Group By Terminal to send orders and items originating from a specific terminal to a video group other than the video group to which they currently appear. To revert to the original video group before the EOD process occurs, add another Reroute Video Group By Terminal event, switch the 'from' and 'to' video groups, and select an activation schedule that starts at the desired end

time. **Related Requirements: 1)** You define terminals in Maintenance > Hardware > Terminals. **2)** You define video groups in Maintenance > Hardware > Video Groups.

Terminal — Designates the terminal from which the orders to begin rerouting by video group originate. Interface terminals also appear in the list for selection.

From video group — Designates the video group on which the orders to reroute currently appear.

To video group — Designates the target video group.

Reroute Video Queue

Use Reroute Video Queue to send orders and items appearing in one video queue to another video queue. To revert to the original routing before the EOD process occurs, add another Reroute Video Queue event, switch the 'from' and 'to' videos, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define video queues in Maintenance > Hardware > Video Queues.

From video — Designates the video queue on which the orders to reroute currently appear.

To video — Designates the target video queue.

Set Guest Check Footer Message By Revenue Center

Use Set Guest Check Footer Message by Revenue Center to override the current message that prints in the footer of a guest check for orders that originate from a specific revenue center. To revert to the original guest check footer message before the EOD process occurs, add another Set Guest Check Footer Message By Revenue Center event, select the original message, and select an activation schedule that starts at the desired end time. **Related Requirements: 1)** You define revenue centers in Maintenance > System Settings > Revenue Center. **2)** You define guest check messages in Maintenance > Messaging > Guest Check Message.

Revenue Center — Designates the revenue center from which the orders to override the guest check message originate.

Message — Designates the guest check message to print in the footer of the guest check.

Footer Line 1 through Footer Line 12 — Shows the text for the selected message. This text is read only.

Set Guest Check Footer Message By Tender Group

Use Set Guest Check Footer Message by Tender Group to override the current message that prints in the footer of a guest check when you apply a payment using a tender in the designated tender group. To revert to the original guest check footer message before the EOD process occurs, add another Set Guest Check Footer Message By Tender Group event, select the original message, and select an activations schedule that starts at the desired end time. **Related Requirements: 1)** You define tender

groups in Maintenance > Payments > Tender Groups. **2)** You define guest check messages in Maintenance > Messaging > Guest Check Message.

Tender Group — Designates the tender group for which to override the guest check message.

Message — Designates the guest check message to print in the footer of the guest check. The first guest check message defined in the system prints by default.

Footer Line 1 through Footer Line 12 — Shows the text for the selected message. This text is read only.

Set Guest Check Message

Use Set Guest Check Message to override the current message and print a special message, such as a holiday greeting, in the header and footer of the guest check. To revert to the original guest check message before the EOD process occurs, add another Set Guest Check Message event, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define guest check messages in Maintenance > Messaging > Guest Check Message.

Message — Designates the guest check message to print in the header and footer of the guest check. The first guest check message defined in the system prints by default.

Header Line 1 through Header Line 2 — Shows the header text for the selected message. This text is read only.

Footer Line 1 through Footer Line 12 — Shows the text for the selected message. This text is read only.

Set Left Message

Use Set Left Message to override the current main screen message that appears on the left side of the login screen of order entry terminals with a custom message, such as a holiday greeting or new specials. To revert to the original main screen message before the EOD process occurs, add another Set Left Message event, select the original message, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define main screen messages in Maintenance > Messaging > Main Screen Message.

Message — Designates the main screen message to appear on the left side of the login screen of order entry terminals. The first main screen message defined in the system prints by default.

Line 1 through Line 8 — Shows the text for the selected message. This text is read only.

Set Modifier Item

Use Set Modifier Item to add an item to a modifier group, for instances when you want a modifier item to be available within a modifier group. To revert to the original modifier item before the EOD process occurs, add another Set Modifier Item event, select the original item or 'None,' and select an

activation schedule that starts at the desired end time. **Related Options:** Access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and clear 'Restrict price edit' under the 'Restriction settings' group bar to expose this event. **Related Requirements: 1)** You define modifier groups in Maintenance > Menu > Modifier Groups. **2)** You define modifier items in Maintenance > Menu > Items.

Modifier group — Specifies the modifier group to which to add the modifier item. 'None' is a valid option

Item to set — Designates the item to add and make available in the specified modifier group. 'None' is a valid option.

Modifier item price — Stipulates the price of the modifier item when it is made available through this event

Weight — Specifies the selection weight of the modifier as it pertains to the number of required modifiers. For example, normally, a modifier counts as one toward the number of required modifiers, but if this modifier counts as two, type '2' for the weight.

Set Pole Message

Use Set Pole Message to display a main screen message on a pole display. If you configure a main screen message to appear on a pole display in the Main Screen Message function, and you activate a main screen message using this event type, the messages appear in sequence on the pole display. To disable a main screen message before the EOD process occurs, add another Set Pole Message event, select 'None' for the message, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define main screen messages in Maintenance > Messaging > Main Screen Message.

Message — Designates the main screen message to appear on the pole display.

Line 1 through Line 8 — Shows the text for the selected message. This text is read only.

Set Right Message

Use Set Right Message to override the current main screen message that appears on the right side of the login screen of order entry terminals with a custom message, such as a holiday greeting or new specials. To revert to the original main screen message before the EOD process occurs, add another Set Right Message event, select the original message, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define main screen messages in Maintenance > Messaging > Main Screen Message.

Message — Designates the main screen message to appear on the right side of the login screen of order entry terminals.

Line 1 through Line 8 — Shows the text for the selected message. This text is read only.

Set Screen by Jobcode

Use Set Screen by Jobcode to override the default screen that appears based on the job code under which an employee clocks in to the system. To revert to the original default screen before the EOD process occurs, add another Set Screen by Jobcode event, select the original screen, and select an activation schedule that starts at the desired end time. **Related Requirements: 1)** You define job codes in Maintenance > Labor > Jobcodes. **2)** You define screens in Maintenance > Screen Designer > Quick Service Screen Designer > Work with Screens.

Jobcode — Designates the job code under which the employee must clock in for the screen to appear.

Screen — Designates the screen to appear in place of the default screen defined for the job code

Set Starting Bank Amount By Jobcode

Use Set Starting Bank Amount By Jobcode to establish a default and maximum starting bank amount for employees who clock in under a specific job code. **Related Requirements:** You define job codes in Maintenance > Labor > Jobcodes.

Jobcode — Designates the job code for which to establish the default and maximum starting bank amounts.

Starting bank amount — Specifies the default starting bank amount at open.

Maximum allowable starting bank amount — Specifies the maximum starting bank amount an employee who clocks in using the specified job code can enter.

Set Video Color for Items

Use Set Video Color for Items to change the default background and text color used for items from a specific category on the video screen when a guest orders the item as a menu item. To revert to the default background and text colors before the EOD process occurs, add another Set Video Color for Items event, select the original category, text, and background colors, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define categories in Maintenance > Menu > Categories.

Select category — Designates the category of items for which to use the new background and text colors.

Text color — Designates the color to use for text when you select an item from this category as a menu item.

Background color — Designates the color to use for the background when you select an item from this category as a menu item

Set Video Color for Modifiers

Use Set Video Color for Modifiers to change the default background and text color used for items from a specific category on the video screen when a guest orders the item as a modifier item. To return to the default background and text colors before the EOD process occurs, create another Set Video Color for Modifiers event, select the original category, text, and background colors, and select an activation schedule that starts at the desired end time. **Related Requirements:** You define categories in Maintenance > Menu > Categories.

Select category — Designates the category of items for which to use the new background and text colors.

Text color — Designates the color to use for text when you select an item from this category as a modifier item.

Background color — Designates the color to use for the background when you select an item from this category as a modifier item.

Filter Text

Select **Maintenance > System Settings > Filter Text** to access this function.

There are multiple locations when working in the Front-of-House (FOH) where employees can enter free-form text that is guest facing, such as tab names, check names, open modifiers, open items, special instructions, and more. Use the Filter Text function to set up a filter for preventing the entry of undesired words, such as profanity, in these locations. If an employee enters one of these words on the FOH, the system displays a message letting the employee know the entry is not allowed and to please re-enter the information.

Filter Text tab

Group bar: Settings

Name — Accept the default name, 'Filter text,' or name the file to something of your choosing.

Number of spaces to filter — Eliminates the ability to use the same letters of an inappropriate or profane word using spaces. For example, 'D U M ...' The default is '2.'

Group bar: Filtered words

Use the 'Filtered words' group bar to add the undesired words of your choosing.

Word — Designates an undesired word to prevent its entry from appearing in the Front-of-House.

Fiscal Calendar Settings

Select **Maintenance > Business > Fiscal Calendar Settings** to access this function.

Use the Fiscal Calendar Settings to define the calendars used by your organization.

Settings tab

Use the 'Settings' tab to define all system and report parameters for sales, payroll, and inventory cycles. You may need to update this information periodically to add additional time to the calendars. You can also create several years in advance and view previous years.

Group bar: Settings

Start of year after the last 53 week year — Designates the starting date for the fiscal year. The date defaults to the current date. For the current year, set this date to the first day of the business fiscal calendar.

Number of periods — Defines the number of reporting periods in the fiscal calendar.

12 — Defines a year-long calendar of 12 periods, roughly corresponding to months. **Required Options:** Selecting 12 enables the 'Quarter layout' option where you select a reporting pattern for each 'month' in the quarter.

13 — Defines a year-long calendar comprising 13 periods of four weeks each.

Quarter layout — Specifies the reporting pattern when you select 12 periods lasting three 'months' each.

5,4,4 — Specifies the quarter begins with a five week 'month.'

4,5,4 — Specifies the quarter begins with a four week 'month,' followed by a five week 'month.'

4,4,5 — Specifies the quarter ends with a five week 'month.'

Automatically add 53rd week to year when required — When selected, adds a 53rd week to a fiscal calendar when the standard calendar begins and ends in the middle of a week. The starting week or the ending week reporting period will include dates from the prior or following standard calendar year.

Compare 53rd week to — Allows you to select to which year you want the 53rd week added. 'Week 1 of current year' or 'Week 52 of prior year.'

Preview tab

The Preview tab allows you to view the selected year in calendar format.

Display year — Allows you to change the year appearing in the preview area.

Fiscal Devices

Select **Maintenance > Hardware > Fiscal Devices** to access this function.

Fiscal devices enable your company to comply with certain governmental fiscal reporting requirements. To ensure that consumption taxes, where applicable, get recorded and reported, you can configure Aloha POS terminals to pass sales data through a sales recording module (SRM) which provides SRM-generated receipts to your customers. The SRM intercepts the data and adds a fiscal transaction ID and bar code to the bottom of each receipt. The SRM keeps a record and then produces periodic sales summary reports to comply with government regulations.

Fiscal Device tab

Use the Fiscal Device tab to configure each fiscal device and identify it to the Aloha POS system.

Group bar: Settings

Name — Identifies the device.

Host type — Specifies the type of device to use for hosting the SRM pass through.

Terminal — Designates a POS terminal serves as a host to the fiscal device.

Custom Machine — Specifies an SRM connected to your POS system through the company intranet serves as a host to the fiscal device.

Terminal — Designates which previously defined terminal serves as the host. **Required Options:** You must select 'Terminal' as the host type to enable this option.

URL of custom machine — Identifies the URL of the device to which you wish to connect. **Required Options:** You must select 'Custom machine' as the host type to enable this option.

Port — Specifies the physical port assigned to the fiscal device.

Baud rate — Specifies the baud rate of the device. Refer to the device instructions for more information on baud rate.

Flex Tax Rule

Select **Maintenance > Taxes > Flex Tax Rule** to access this function.

Flex tax rules enable you to apply taxes to items based on varying conditions. For example, you can create a rule to apply a tax to an item when the quantity sold is less than six, and another tax when the quantity is six or more. Another flex tax rule example is to create a rule to charge no tax on a soft drink when you order it with other food items, and then charge tax on the same soft drink when you order it individually.

You can set up a variety of flex tax rules. A single flex tax rule does not stand alone; instead you create flex tax rules that link from one rule to another until you reach the end of the chain. The last link (flex tax rule) in the chain actually establishes the tax to apply to the guest check. The method you choose when you create each flex tax rule determines the options available to you when defining the conditions under which to apply the rule. Available methods are as follows: Always, Quantity, Subtotal, Category, Quantity by category, and Tax locale.



Reference

Refer to the [Tax by Destination Feature Focus Guide - HKS383](#) for a good example of how to apply flex tax rules.



Tip

Before you can define flex tax rules, you must create all applicable primary or secondary tax records in Maintenance > Taxes > Tax Types.

Flex Tax Rule types

Primary establishes the rule as applying to the primary taxes for which you are responsible in your taxing jurisdiction.

Secondary establishes the rule as applying to secondary taxes for which you are responsible in your taxing jurisdiction.



Tip

To select any flex tax rule as a secondary flex tax for an item, access Maintenance > Business > Store > Store Settings tab > Financials group and select 'Enable Secondary Taxes' under the 'Taxes' group bar.

Flex Tax Rule tab

Flex tax rules enable you to apply taxes to items based on varying conditions.

Group bar: Settings

Name — Identifies the flex tax rule. Type a maximum of 15 characters.

Description — Identifies the purpose of the flex tax rule. Type a maximum of 50 characters.

Method — Specifies the conditions under which to apply the flex tax rule. Available methods are as follows:

Always — Establishes the tax type to apply to the guest check when the conditions successfully resolve to the last flex tax rule in the chain.

Quantity — Applies the flex tax rule based on the quantity of the ordered item.

Subtotal — Applies the flex tax rule based on the subtotal of the guest check.

Category — Applies the flex tax rule based on the category of items from which the customer must make a purchase.

Quantity by category — Applies the flex tax rule based on the quantity ordered of an item from a designated category.

Tax locale — Applies the flex tax rule based on the tax locale of the address to which you are delivering an order.



Tip

The first flex tax rule you create becomes the last flex tax rule in the chain and must be one that uses the 'Always' method.

Group bar: Always

You must select 'Always' as the method to enable this group bar.

Tax type — Designates the tax to apply when a flex tax rule affects all items. If you select 'Always' as the 'Method,' the tax type specified for this option gets applied at all times.

Group bar: Quantity

You must select 'Quantity' as the method to enable this group bar.

Apply tax if item quantity is less than — Indicates the quantity of the ordered item below which the system applies the flex tax rule selected in 'Chain to if successful' under the 'Chaining' group bar. If the quantity is equal to or greater than this number, the system applies the flex tax rule selected in 'Chain to if fails.' For example, if the quantity is set to six and a customer orders five or less of the item, the system applies the flex tax rule for the successful condition; otherwise, the system applies the flex tax rule for the failed condition.

Group bar: Subtotal

You must select 'Subtotal' as the method to enable this group bar.

Apply tax if guest check subtotal is less than — Indicates the guest check subtotal below which the system applies the flex tax rule selected in 'Chain to if successful' under the 'Chaining' group bar. If the subtotal is equal to or greater than this amount, the system applies the flex tax rule selected in 'Chain to if fails.' For example, if the subtotal is set to \$5.00 and the guest check subtotal is \$4.99 or less, the system applies the flex tax rule for the successful condition; otherwise, the system applies the flex tax rule for the failed condition.

Group bar: Category

You must select 'Category' as the method to enable this group bar.

Apply tax if any items in this category are on the guest check — Indicates the category from which a customer must purchase an item before which the system applies the flex tax rule selected in 'Chain to if successful' under the 'Chaining' group bar. If an item from this category does not exist on the guest check, the system applies the flex tax rule selected in 'Chain to if fails.' For example, if the category is set to Retail and a customer purchases a t-shirt or other item from the Retail category, the system applies the flex tax rule for the successful condition; otherwise, the system applies the flex tax rule for the failed condition.

Group bar: Quantity by category

You must select 'Quantity by category' as the method to enable this group bar.

Is category quantity less than — Indicates the quantity below which a customer must make a purchase of items from the designated category before the system applies the flex tax rule selected in 'Chain to if successful' under the 'Chaining' group bar. If the customer purchases a quantity of items from the designated category that is greater than this, the system applies the flex tax rule selected in 'Chain to if fails.' For example, if the quantity is set to six and a customer orders five or less of the item from the designated category, the system applies the flex tax rule for the successful condition; otherwise, the system applies the flex tax rule for the failed condition. **Required Options:** You must select a category in 'Check for items in this category are on the guest check.'

Check for items in this category are on the guest check — Indicates the category from which a customer must purchase the designated quantity of an item before the system applies the flex tax rule selected in 'Chain to if successful' under the 'Chaining' group bar. If an item from this category does not exist on the guest check, the system applies the flex tax rule selected in 'Chain to if fails.' For example, if the category is set to Retail and a customer purchases five or less t-shirts from the Retail category, the system applies the flex tax rule for the successful condition; otherwise, the system applies the flex tax rule for the failed condition. **Required Options:** You must specify a quantity in 'Is category quantity less than.'

Group bar: Tax locale

You must select 'Tax locale' as the type to enable this group bar.

Apply tax if tax locale is — Indicates the tax locale to which you must make a delivery before the system applies the flex tax rule selected in 'Chain to if successful' under the 'Chaining' group bar; otherwise, the system applies the flex tax rule selected in 'Chain to if fails.' This is for use with NCR Aloha Takeout and allows you to deliver to, and apply the appropriate taxes for, customers that reside in a zip code for which different taxes apply. **Required Options:** Access Maintenance > Taxes > Tax Locale to define tax locales.

Group bar: Chaining

This group bar appears for every method except 'Always.'

Chain to if successful — Designates the flex tax rule to apply when the conditions for the flex tax rule are met; otherwise, the system applies the flex tax rule selected in 'Chain to if fails.' **Required Options:** You must select a flex tax rule to apply when the conditions for the flex tax rule fail in 'Chain to if fails.'

Chain to if fails — Designates the flex tax rule to apply when the conditions for the flex tax rule fail; otherwise the system applies the flex tax rule selected in 'Chain to if successful.' **Required Options:** You must select a flex tax rule to apply when the conditions for the flex tax rule are successful in 'Chain to if successful.'

Foreign Currencies

Select **Maintenance > Payments > Foreign Currencies** to access this function.

Use the Foreign Currencies function to set up foreign currencies as acceptable methods of payment at a restaurant location. When the FOH staff presses the tender button that corresponds to the foreign currency, the Aloha POS system uses the exchange rate to convert the amount to local currency, which then appears on screen.

The name of the foreign currency, its exchange rate, the amount tendered, and the corresponding amount in local currency appear on the guest check. If the amount entered does not equal the amount of the check, the change due amount or balance due amount also appear in local currency.

Foreign currency amounts appear on guest checks, pole displays, and other peripheral devices that show foreign currency, as follows:

Name	Exchange Rate	Foreign Amount	Local Equivalent
Pound	1.65	£ 8.00	\$13.20



Tip

When you update the exchange rate for a foreign currency, a real-time update screen appears for you to send the foreign currency information to the FOH terminals immediately. If you choose not to, you must wait for the End-of-Day (EOD) process to accomplish the data refresh for you.

Foreign Currency tab

Use the Foreign Currency tab to define basic information about foreign currencies as a method of payment.

Group bar: Settings

Name — Identifies the foreign currency. Type a maximum of 20 characters.

Symbol — Identifies the symbol that appears on the FOH terminal when you select the tender. Sometimes, you must copy and paste the applicable symbol from another application, such as the character map located in Windows.

Decimal places — Specifies the number of digits to the right of the decimal point. Although two is the standard for North America, many nations require three digits to the right of the decimal.

Decimal separator — Specifies the character to use to separate whole values from fractional values.

Thousands separator — Specifies the character used to separate numbers in thousands. North American custom specifies a comma as the thousands separator; however, European custom requires a period.

Display in balance due section — Forces the foreign currency to always appear next to the local currency on the FOH balance due screen.

Display in change due section — Shows the foreign currency amount along with the local currency amount on the FOH change due screen.

Positive format — Specifies the format for showing currency in positive amounts. For example, using the format '\$1.10' or '1.10\$', all currency with a value of one or greater appears as a positive number, followed by a decimal (or decimals).

Negative format — Designates the format to use for displaying currency in negative amounts. For example, using the format '- \$1.10,' '(1.10),' or '-1.10\$,' all currency with a value less than zero appears as a negative number, followed by a decimal (or decimals).

Exchange rate — Determines the multiplier used to convert between the local currency and the foreign currency. The exchange rate should be monitored regularly. It is very important to understand the direction of the currency exchange when entering the rate in this box. If the Aloha POS system does not apply the exchange rate correctly, you can inadvertently undercharge or overcharge a customer.

 **Tip**

To ensure the correct direction of exchange, ask yourself which currency has a greater value, then use this logic: If the foreign currency has a higher value than the local currency, the exchange rate must be greater than 1.00. If the foreign currency has a lower value than the local currency, the exchange rate must be less than 1.00.

Prefix for exchange rate on check — Specifies the characters to precede the exchange rate on checks. Type a maximum of three characters.

Suffix for exchange rate on check — Specifies the characters to follow the exchange rate on checks. Type a maximum of three characters.

Group bar: Payment display

Use the Payment Display group bar to determine special characters that precede and follow a payment on checks.

Prefix for payment on a check — Specifies the characters to precede a payment on checks.

Suffix for payment on a check — Specifies the characters to follow a payment on checks.

Guest Check Message

Select **Maintenance > Messaging > Guest Check Message** to access this function.

Use the Guest Check Message function to customize the information that prints on guest checks and credit card vouchers. This function enables the restaurant manager to communicate with guests through messages and you can vary messages at different times and in different places within the restaurant. The first guest check message defined in the system prints by default; however, you can also activate guest check messages using scheduled events using one of the following event types:

- Set Guest Check Message
- Set Guest Check Footer Message by Terminal
- Set Guest Check Footer Message by Tender Group
- Set Guest Check Footer Message by Revenue Center



Reference

Refer to [Event Schedule](#) for more information regarding configuring and using events.

Message tab

Use the Message tab to define basic information about the guest check message.

Group bar: Settings

Name — Identifies the guest check message.

Group bar: Header text

Line 1 and Line 2 — Specifies the text to print at the top of the guest check in one or two lines. The desired text prints on the guest check exactly as typed. If you want the message centered, you must type the message to appear centered.

Barcode message — Designates the bar code message to print at the top of the guest check.

Required Options: You must define bar code messages in Maintenance > Messaging > Barcode Messages before you can select one to print on a guest check.

Group bar: Footer text

Footer text — Specifies the text that prints at the bottom of the guest check, to communicate directly with the guest. The message area is for sales messages and promotions, seasonal greetings, upcoming events, or any other desired message. The lines center automatically when the message prints on the guest check.

Line 1 through Line 12 — Specifies up to 12 lines of text to print at the bottom of the guest check. The message area is for sales messages, seasonal greetings, upcoming events, or any other desired message. The lines center automatically when the message prints on the guest check.

Barcode message — Designates the bar code message to print on the bottom of the guest check.
Required Options: You must define bar code messages in Maintenance > Messaging > Barcode Messages before you can select one to print on a guest check.

House Accounts

Select **Maintenance > Payments > House Accounts** to access this function.

Use the House Accounts function to define house accounts you can then treat as accounts receivable within the Aloha POS system, when coupled with a correctly defined house account tender type in Maintenance > Payments > Tenders.

When you tender a house account payment on the FOH, the Aloha POS system prompts for the account identification. The account number you enter must match either the account number or account name of a valid house account or the Aloha POS system rejects the payment.

House Account tab

Use the House Account tab to record name and address information for each house account.

Group bar: Settings

Account name — Identifies the holder of the house account. Type a maximum of 20 characters. The characters convert to 'Uppercase.' The account name must be unique or an error message appears. If you do not provide an account name, the account number appears for this option.

First name — Indicates the first name of the account holder.

Middle name — Indicates the middle name of the account holder.

Last name — Indicates the last name of the account holder.

Telephone — Indicates the contact phone number for the account holder.

Inactive — Designates the account as not currently active.

Group bar: Address

Address — Indicates the street address for the account holder.

Address 2 through Address 4 — Indicates any supplemental address information, such as apartment number or suite number.

City/town — Indicates the city or town.

County — Indicates the county.

State — Indicates the state.

Postal code — Indicates the zip code.

Installed Products

Select **Maintenance > Business > Installed Products** to access this function.

The Installed Products function enables you to configure certain options once for a global user and then apply your selections across all stores, no matter if they are corporate-owned or franchisee-owned stores. For example, you can define the maximum number of items each store can offer. You do not need to create a global user for your organization, as the system creates this user automatically at the time of installation; however, you can modify certain global settings.

Global tab

Use the Global tab to modify global settings that affect every store. You must log in as an employee with global access, to make changes in the Installed Products function.

Group bar: Identification

Name — Identifies the user as 'Global.' This option is read-only.

Group bar: Login settings

Enable password reset — Enables managers with appropriate security permissions to clear the stored password the employee uses to log in to the system, and prompts to enter an optional temporary password for the employee. If you do not specify a temporary password, the login process automatically prompts the employee to create a new password on their first log in.

Reset password expiration — Allows you to set passwords to expire at reasonable intervals, such as 30 days, 45 days, or any interval specified by your corporate standards.

Minimum password length — Specifies the minimum number of digits allowed for manually entered login IDs and access approvals. This option does not apply to mag card use.

Group bar: Item limits

Maximum number of items — Specifies the maximum number of items you can add to the system database. The default is 15,000. Valid entries range from 1,000 to 500,000.

Maximum number of item price changes in thousands — Indicates the number of items you can select for a price change, multiplied by 1,000. The default is '5.' If you attempt to activate more items than the value specified, a warning message appears, indicating you exceeded the maximum value. For example, if you set this option to '6,' you can select a maximum of 6,000 items to activate.



Caution

Activating more than 5,000 new prices, using the Price Changes function, uses an extreme amount of memory and affects processor speed. If you implement this feature, please ensure your terminals at the corporate and store levels have a fast processor.

Maximum number of promotion price changes in thousands — Indicates the number of promotions you can select for a price change, multiplied by 1000. The default is '5.' If you attempt to activate more promotions than the value specified, a warning message appears, indicating you exceeded the maximum value. For example, if you set this option to '6,' you can select a maximum of 6000 promotions to activate.

Allow fractions for item guest count — Enables you to enter a fractional guest count to represent a value other than a whole number for items, such as appetizers, when the item resides in the category you define for 'Use entrees for guest count' located in Maintenance > Business > Store > Store Settings tab > Order Entry group under the 'Guest count' group bar. The system uses the 'Guest count weight' you define in Maintenance > Menu > Items > General Settings tab under the 'General' group bar as the base from which to calculate fractions. The fractional values round up to the nearest whole number, per table, and do not carry over to a separate check nor to the next table. The guest count reflects on all FOH and BOH reports.

All items must be assigned to a tax group — Requires you to assign all items to a tax group.

Group bar: Menus

Modifier rows — Indicates the maximum number of rows that can appear when you select modifier items.

Modifier columns — Indicates the maximum number of columns that can appear when you select modifier items.

Maximum number of table digits — Indicates the maximum number of digits allowed in a table number.

Group bar: Products installed

Uses Takeout — Activates NCR Aloha Takeout so that the user interface displays the applicable icon, menus, and options.

Uses Kitchen — Activates NCR Aloha Kitchen so that the user interface displays the applicable icon, menus, and options.

Uses Occasions — Activates Occasions so that the user interface displays the applicable icon, menus, and options. Also exposes the PAR Templates function on Maintenance > System Settings.

Uses Order Point — Activates NCR Aloha ORDERPOINT! so that the user interface displays the applicable icon, menus, and options.

Uses Electronic Draft Capture — Activates NCR Aloha Electronic Draft Capture so that the user interface displays the applicable icon, menus, and options.

Uses Connected Payments — Activates NCR Connected Payments so that the user interface displays the applicable menus and options.

Uses Alerts — Activates Alerts so that the user interface displays the applicable menus and options.
Documented Version: v12.3.1.



Reference

Refer to the [Alerts Feature Focus Guide - HKS334](#) for more information on configuring and using alerts.

Uses Kiosk — Activates Consumer Self Ordering (Kiosks) so that the user interface displays the applicable menus and options. **Documented Version:** v12.3

Group bar: User levels

Allows you to assign a user level to an employee to control access to payroll information in the Employees function, Users function, Terminated Employees function, and any reports that publish payroll information. Enabling this function restricts the user level from editing or viewing restricted information on an employee record with a user level equal to or greater than the current level. Printed or on-screen reports do not show payroll information for any levels greater than or equal to the current user level. This feature does not appear when logged in as a corporate employee; it is available only when logged in as a global employee, and is disabled by default. Valid user levels include User level 1 through User level 9. User level 9 (Admin) has the highest level of access; and user level 1 (Least Privileged) has the minimum level of access. The Least Privileged and Admin user levels are seeded in the User Levels function when you upgrade; however, you can change the name according to your company requirements. Also, this function requires a minimum of three user levels before you can save the record. **Related Requirements:** Once you define your user levels, access Maintenance > Labor > Employees and Maintenance > Labor > Users to specify the user level for each employee. If you do not specify a user level, the system defaults to User level 1 (Least Privileged).

Enable user levels — Exposes the user levels feature. There are nine available user levels with two user levels automatically seeded for you, Least Privileged and Admin User. You must have a minimum of three user levels to save any changes. **Required Version:** Aloha POS v15.1.53 and CFC v20.10. **Related Options:** Exposes the 'User level 1' through 'User level 9' options.

User level 1 through 9 — Enables the administrator to change the user levels; from one to nine. There are defaults, such as 'Least Privilege' assigned to User level 1, and 'Admin user' assigned to User level 9. **Note:** It is not necessary to type a user for each user level, but you must have a minimum of three user levels. **Required Version:** Aloha POS v15.1.53 and CFC v20.10. **Related Options:** You must select 'Enable user levels' to expose and enable this option.

Data Retention Policies tab

Use the Data Retention Policies tab to configure the time your company retains audit results for historical, and business purposes.

Group bar: Specific data retention policies

Months to retain audit data — Designates the number of months to maintain audit data in your database.

Integrations

Select **Maintenance > System Settings > Integrations** to access this function.

Use Integrations to broaden the connectivity of the Aloha POS. Integrations enable restaurants to connect to and share data with virtually any third-party application, and also to share data within one or multiple locations. You create, manage, and store configuration profiles that allow the Aloha POS system to exchange communication with third-party applications, such as PayPal, Guest Management Systems, and Mobile Pay.

Integrations tab

Use the Integrations tab to identify the interface terminal and control the behavior of the systems using this integration for connectivity.

Group bar: Settings

Polling time in seconds — Designates the number of seconds to wait for a response from the third-party system assigned to the selected integration.

Interface server terminal — Specifies the terminal to act as the interface server for the selected integration connectivity and support the injection of online orders into the POS system. **Required Options:** You define terminals in Maintenance > Hardware > Terminals.

Interface terminal — Specifies a terminal to manage the connection. This terminal works with the interface server terminal and an interface employee to inject online orders into the POS system. **Required Options:** You define terminals in Maintenance > Hardware > Terminals.

Type of operation — Specifies the Aloha POS system for which you configure this integration. Choose either Table Service or Quick Service.

Additional POS Parameters — Allows you to add parameters specific to the active POS system. Work with your Client Services Manager to define any additional parameters.

Start the POS if not already running — Checks for an existing POS system in operation, and starts the POS system if not found.

Force start of POS even if instance found — Forces the start of an additional instance of the POS system, even if a current instance is running.

IP address in case of dual NIC — Specifies the IP address assigned to this integration. This ensures the connectivity will remain uniform and always go through the same IP address. **Related Options:** Selecting this option exposes 'Back of house machine name' and Aloha network IP address.'

Back of house machine name — Identifies the BOH server indicated by the IP address assigned to this integration. **Required Options:** You must select 'IP address in case of dual NIC' to expose this option.

Aloha network IP address — **Required Options:** You must select 'IP address in case of dual NIC' to expose this option.

Print intercept timeout (in seconds) — Specifies the number of seconds the Print Interceptor function remains active while waiting for input, before it times out. An intercepted report remains on screen until you print, or release it, or until the time reaches the number set in this option. Print Interceptor times out automatically when the FOH returns to the floating logo.

Maximum debug file size (in MB) — Specifies the maximum size for a debug file (typically 4MB). When debugging, the system creates a maximum of four sequential debugs. This option specifies the maximum amount of data in each file before the next file takes over. The maximum allowable file size depends upon the storage capacity of your local hardware.

Service username — **Required Options:** You must select 'Start the POS if not already running' to enable this option.

Service password — **Required Options:** You must select 'Start the POS if not already running' to enable this option.

Group bar: Additional plugins

Use PayPal photo basic check-in — Enables connectivity with the PayPal photo basic check-in system, if your system is configured to use it.

Guest management system type — Enables the selected integration to access the guest management system configured for your system. Your choices include None, Aloha Guest Manager, or NCR Guest Pad.

Enable Mobile Pay — Enables the selected integration to access the mobile payment function configured for your system.

PayPal payments tab

This tab and the options on it appear only if you select 'Use PayPal photo basic check-in' under the 'Additional plugins' group bar on the Integrations tab.

Customer email address — Captures the email address of the customer who is using PayPal photo basic check-in.

Fax number — Specifies the fax number for the store site, if applicable.

Website — Specifies the web site URL for the store site, if applicable.

PayPal tender — Identifies the tender configured for PayPal in Maintenance > Payments > Tenders.

Location Id — Identifies the store location.

Token — Indicates the store registered with PayPal and authenticates the store identification in API communications.

Mobile Pay tab

This tab and the options on it appear only if you select 'Enable Mobile Pay' under the 'Additional plugins' group bar on the Integrations tab.

Interface Employee — Specifies the interface employee created in Maintenance > Labor > Employees through which mobile payments process in the Aloha POS system. Products, such as Aloha Take-out, Mobile Pay, and online ordering require an interface employee to interact appropriately with the server. We recommend you create a generic interface employee that can be accessed by multiple actual employees so this function works smoothly.

Interface Jobcode — Specifies the job code assigned to the interface employee configured for your system.

Enable tip for Mobile Pay — Activates a tip prompt so that guests using mobile pay have an opportunity to tip the employee, such as a server.

Mobile pay tender screen title — Specifies the name for the mobile pay tender screen to differentiate it from another tender screen.

Print Mobile Pay chit when first Order Mode is applied on the check — Enables printing a chit containing the Mobile Pay code each time you open a check (and an order mode is applied).

Print Mobile Pay code on the guest check — Enables printing the Mobile Pay code on the bottom of the receipt/guest check.

Open Item — Sets the item ID (in POS) that Mobile Pay uses to add a 'message' item to the check. For example, Mobile Pay adds item 9999 to the check which prints the message specified in Open Item text..

Open Item text — Specifies the text that corresponds to the ID number designated in Open Item. For example, you can type text, such as 'Guest may pay with Mobile Pay' to correspond to item 9999.

Custom tab

Use the custom tab to configure the plug ins that manage the selected integration.

Group bar: Custom

Plugin — Identifies the plugin name.

XPath — Indicates the path where you want to add the new data item. Use the standard xml xpath search format, and must start with /AtgSettings as root element. Will create elements if they are not found.

Element name — Specifies the name of the attribute to add to the element.

Value — Specifies the value of the attribute configured with 'Element name.'

Attribute — Should always be true.

Interactive Messages

Select **Maintenance > Messaging > Interactive Messages** to access this function.

Use the Interactive Messages function to create messages to send to your employees. You can configure the message to appear when the employee clocks in or clocks out, depending on your need. We recommend you phrase the message as a question so that employees can respond with Yes or No, where a No response requires immediate attention or feedback. You can also create messages in a foreign language directed to non-English speaking employees.

The interactive message appears to the same employees daily, until you change the assignment. The following table shows the differences in behavior when assigning an interactive message to a specific employee or to a labor group:

Employee	Labor Group	Result
Assigned	None	Sends a daily message to the specific employee.
None	Assigned	Sends a daily message to employees assigned to a job code or to a specific clock in for a specific job code.
Assigned	Assigned	Sends the message daily to a specific employee as well as to a group of employees. Note: If the specific employee is part of the assigned labor group, the employee receives the message only once.
None	None	Disables the message.



Reference

Refer to the [Interactive Messages Feature Focus Guide - HKS496](#) for more information.

Interactive Message types

When you create a new message, you must select the type of message you want to create. Select from the following types, when you click the **down-arrow** next to New, to add a new message:

Clock In represents a message that appears to assigned employees at clock in only each shift.

Clock Out represents a message that appears to assigned employees at clock out only each shift.

Early Return from Enforced Break represents a message that appears to assigned employees who return early from a required break, when your restaurant requires employees to clock out and clock in for required breaks.

Interactive Message tab

Use the Interactive Message tab to define and create messages to send to your employees.

Group bar: Settings

Name — Identifies the interactive message. Type a maximum of 25 characters.

Type — Identifies the type of message you selected from the list box that appeared when you clicked the New drop-down arrow.

Labor group — Designates the labor group to which to send the message. All employees who clock in using the job codes assigned to the labor group receive the message daily until you change the assignment.

 **Note**

When you modify a labor group, the change applies to all job codes assigned to that group. To disable a message from one job code only, remove that job code from that labor group.

Manager approval needed when response to message is — Designates the response for which you require manager approval before the employee can continue with the clock in or clock out process. Select from Yes, No, and Yes or No. None is a valid option. **Required Options:** To provide an employee the ability to approve an interactive message response, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Approve interactive message response' under the 'Employee' group bar.

Group bar: Text

Line 1 through Line 15 — Specifies up to 15 lines of text to appear in the interactive message. Each line has a maximum of 25 characters. The message appears centered on the FOH screen.

Employees tab

Use the Employees tab to assign the interactive message to specific employees. If you need the message distributed to more than one employee, such as any employee with a certain job code, you must first create a labor group and include the desired job code in the labor group. Then, you can assign the interactive message to a labor group, instead of an employee.

Group bar: Employees

Use the >> and << arrows to move employees between the 'Available' list and the 'Included' list. The column headings that appear in the 'Included' and 'Available' lists are as follows:

Number — Indicates the employee ID number.

Name — Identifies the employee.

Printers tab

Use the Printers tab to specify the printers at which the message prints when you select 'Print notification to local printer.' For example, an employee returns early from an enforced break, and your company requires manager approval to allow this; the specified notification message prints to the printer or printers you select.

Print notification to local printer — Prints a notification message for the response. The notification message is dependent upon the interactive message to which the employee responds.

Print when response to message is — Designates the required response from the employee for the message to print. Select from No, Yes, and Yes or No.

Notification message — Specifies the content to print in the message. Select a custom message you define in the Guest Check Message function or select Default to use the system-generated text.

Group bar: Additional Printers

Use the >> and << arrows to move printers between the 'Available' list and the 'Included' list. The column headings that appear in the 'Included' and 'Available' lists are as follows:

Number — Indicates the employee ID number.

Name — Identifies the employee.

Items

Select **Maintenance > Menu > Items** to access this function.

The Items function enables you to store all items you sell at your establishment in a central database. You can add up to 999,999 items; however, you can enforce a limit using the 'Maximum number of items' option located under the 'Item limits' group bar in Maintenance > Business > Installed Products > Global tab. Increasing the number of menu items to 30,000 uses more memory and should be used only when necessary.

- Menu items are the building blocks that form the base of the Aloha POS system. You should add every item available to sell or consume at a restaurant to the Aloha POS item database. This means not only do you add 'Double Cheeseburger' to the database; but, also the items used to modify the 'Double Cheeseburger,' such as cheese, lettuce, tomatoes, pickles, onions, and hamburger buns.
- Modifier items are the items or elements that help you customize your menu items, and to customize the preparation of your menu items. For example, if you add an '8oz Steak' to your item database, this typically means that you plan to offer steak as an entrée item for your restaurant. But when a customer orders steak at a restaurant, they do not simply tell the server, "I'd like to order the steak." Instead, they often say, "I'd like to order the steak, prepared medium rare" or "I'd like to order the steak, and make sure it's prepared well done." In these examples, the customer is attempting to customize their order, and the server must have a way to enter the custom requests. To do this, you add modification items to the database, such as meat temperatures, toppings, quantities, and sizes, and anything else that is normally written on a guest check or kitchen chit to modify a menu item.
- Retail items are items you plan to sell, such as shirts, mugs, hats, gift cards, and other sales items your establishment offers.

Each item you add to the database is called an 'item.' And each item requires data from other functions, including Taxes, Surcharges, Modifiers, and Categories, for the item to be complete.

Once you add items to the database, use these items to form the submenus, modifier groups, and exception modifier groups you need for the Aloha Front-of-House POS system.

Item types

When you create a new item in the database, you must select the type of item you want to create. Select from the following types, when you click the New drop-down arrow to add a new item:

Standard represents a basic food, beverage, retail, or modifier item. You generally use the standard type for most items in the database.

Cash card represents a cash card item, when you want to sell cash cards from the FOH terminals.

Required Options: You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display cash card' to expose this item type in Item Maintenance.

Gift card represents a gift card item, when you want to sell gift cards from the FOH terminals.

Required Options: 1) If you are creating a corporate-owned gift card, you must access Maintenance > Business > Additional Features (Corporate Administration)> Corporate Owner tab and select 'Display gift card' to expose this item type in Item Maintenance. **2)** If you are creating a store-owned gift card, in addition to option 1, you must also select one of the below gift card types in Maintenance > Business > Store > Store Settings tab > 'Gift Card/Certificate Sales' group > 'Gift sales' group bar > Gift card/certificate provider. **3)** You must be licensed to use gift cards to enable gift cards.

- Basic gift certificate
- Aloha Stored Value
- Paymentech
- Stored Value System
- Value Link
- Vantiv
- Private Label

Basic gift certificate represents a basic gift certificate item, when you want to sell gift certificates from the FOH terminals. **Required Options: 1)** If you are creating a corporate-owned gift certificate, you must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display basic gift certificate' to expose this item type in Item Maintenance. **2)** If you are creating a store-owned gift certificate, in addition to option 1, you must also access Maintenance > Business > Store > Store Settings tab > 'Gift Card/Certificate Sales' group > 'Gift sales' group bar > Gift card/certificate provider and select 'Basic gift certificate.' **3)** You must be licensed to use Gift Certificate Manager to enable gift certificates.

Build represents a grouping of included, zero-priced modifiers that you can use as a base to prepare one or more menu items. For example, you could group oil and vinegar, lettuce, red onions, and flat bread into one build item, group lettuce, tomato, red onions, mayonnaise, and sourdough bread into another, and so on.

Items quick tips:

An item database can be as simple or as complex as required, but there are several rules or tips to consider when you add a new item to the database:

- Assign numbers to your items in groups, using a uniform method. For example, create appetizers using a number between 3000-3999, and create entrées using a number between 4000-4999.
- You can assign an item a specific ownership level. The owner assigned to an item determines how the record is filtered, when data is distributed to a store, and who has the ability to view and edit the record.
- Item numbers range from 1 to 999998 (999999 is reserved for the PLU button).
- Item numbers 30100-30199 are reserved for 'Open' items and can only be used in the Aloha Table Service environment, not Quick Service. These numbers are also unavailable when your item type is 'gift certificate.'

- Item numbers 30200 to 30299 are reserved for the 'Aloha gift certificate' item type only.
- The short name for an item appears on the order button and can be up to 15 characters; however, if you type more than 11 characters, the short name might appear cropped on a button. As a solution, type '\n' at the desired line break in the 'Short name' text box to configure the short name to appear as two lines on a button.
- The chit name for an item can be up to 15 characters and is typically in ALL CAPS. Consult with the chef for preferences and names.
- The long name for an item can be up to 25 characters and appears on the guest check; therefore, be sure to double-check the spelling.
- It is mandatory to apply a tax, category, and printer group, to an item.
- If applicable, remember to assign a modifier group to an item. You can assign more than one modifier group, if necessary.
- You can price an item at the 'item' level; however, there are alternative pricing methods available to price items, and which one you use depends on your business needs.

Item tab

The Item tab enables you to define basic information about an item, such as the item type, owner type, number, name, and other identification properties of the item. You also use this tab to store tax information for the item, as well as any functional groups to which the item is assigned.

Group bar: Settings

Short name — Indicates the abbreviated name for the item. The short name appears on item buttons in submenus, modifier groups, and exception modifier groups. The text is centered on the button; therefore, the length of the short name is a factor. Type a maximum of 15 characters; however, if you type over 11 characters, the short name might appear cropped on a button. As a solution, type '\n' at the desired line break in 'Short name' to configure the short name to appear as two lines on a button. For example, type 'Hot\nTamale' to have 'Hot' appear on the top line and 'Tamale' appear on the bottom line of a button. Keep in mind, '\n' takes up two of the allotted 15 characters.

Chit name — Indicates the name of the item that appears on the kitchen chit. A chit is a printed order confirmation receipt the kitchen receives after you send an order to the kitchen. The chit name can be up to 15 characters and can contain menu items as well as modifiers, depending on how you enter the order in the system. You typically type the 'Chit name' in ALL CAPS, to make the name easier to recognize. This option is useful if your restaurant uses nicknames for menu items. For example, if the kitchen staff of your restaurant refers to a lobster tail as 'LOB,' type LOB in 'Chit name' and 'LOB' appears on the kitchen chit each time a server enters an order for a lobster tail.

Chit name alternate — Displays another name in place of the standard chit name. When you configure an item in Item Maintenance, the chit name appears on the kitchen chit and on any video display system in use; however, some kitchens do not use kitchen printers and rely primarily on video screens to prepare orders. In v6.4.2, you can now type an alternate chit name, using the language of

your choice, and the operator can toggle the video screen to display the alternate name. This is very helpful for kitchen staff who speak and read a different language. Type a maximum of 15 characters, and trailing spaces are not allowed.

On the video screen, the chit name appears as defined by 'Chit name' for the video device. If you select 'Chit name,' the text entered for 'Chit name' appears. If you select 'Alternate chit name,' the text entered for 'Alternate chit name' appears. If you leave 'Alternate chit name' blank, the text for 'Chit name' appears. For example, if you configure items 'Cheese' and 'Bacon' in Item Maintenance with a Spanish translation for 'Alternate chit name' and the guest orders a #1 with bacon and no cheese, the text in 'Chit name' appears on the video cell.

The employee in the kitchen presses 'Refresh Display' on the bump bar. The video screen switches and the text from 'Alternate chit name' appears ('No Queso,' and 'Add Tocino'). If they press 'Refresh Display' again, the screen returns to 'Chit name' ('No Cheese,' and 'Add Bacon').

Long name — Indicates the formal, more descriptive name of the item. The long name, which can be up to 25 characters, prints on the guest check and is used in conjunction with the item number to create a unique ID for each item in the system.

Long name alternate — Allows you to add a second line of text, in conjunction with Long name, to print on the guest check. You can use this for such things as displaying items in dual languages or for exceptionally long names. The additional line does not appear on the guest check window, reports, or a video screen in use, nor does it contain a price. Starting in v6.4, you can now print a second line of text for an item on the guest check. You may want to print a second line for any of the following reasons:

- In the International market, it is customary to print an item on the guest check in its native language and in English.
- Some menu items have exceptionally long names or include patented signature items that need to appear on the check, such as the 'Aloha[®] Cafe Triple-Decker Hamburger Deluxe.'
- Reserve the second line for the number of calories included in a menu item.

Button image — Specifies the image to assign to the item button. For example, if you add 'soft drink' as an item, you can select the graphic file for a specific brand of soft drink to appear on an item button, on the FOH terminal. To select an image, click the down-arrow to display the Media Files dialog box. Select an image from the list of graphics preloaded into the system database. **Related Options:** An image must be uploaded using the Media Files function, before you can select it from the image list.

Control name — Indicates the global, corporate-level name for an item, when a menu item name is different in certain regions or restaurant locations. Situations arise where geographical or language differences mandate that an item have a different 'Short name' at different locations; although, the corporate office considers both items the same. For example, the corporate office of fast food chain

XYZ might use 'French Fries' as their control name, but use the short name 'Chips' for their restaurants located in England, as the name 'Chips' is more common in that region. 'Control name,' which can be up to 20 characters, is available for the Standard item type only.

Kitchen chit item image — Designates the image to print to the left of the menu item on a kitchen chit, when using a production chit layout in Print Designer. You may want to do this to promote signature items or identify generic items, such as an image of a drink for your drink items. You could also use an image to indicate the serving temperature recommended for items, such as HOT for a coffee, or use an image containing the first letter of an item, such as the letter B for a burrito. We recommend using 22x22 as the dimensions for your image. **Documented Version:** AK v19.3. **Required Options:** You must import the image using the Aloha Kitchen application type in the Media Files function to make the image available in the drop-down list.

Ask for description — Indicates you want the FOH system to prompt for a description of the item when you order or sell the item. When you select this option, a keyboard appears on the FOH screen, allowing you to type a brief description of the item. **Related Options:** To create an 'open item' that prompts for a description and amount in the FOH, for adding items to the guest check that are no longer, or will never be, in the Items database **1)** Select 'Ask for description,' here on this tab. **2)** Select the Pricing tab and select Ask for Price from the 'Pricing method' drop-down list. **3)** Select the Print tab and based on your preference, select or clear 'Print on check when price is zero,' under the 'Check printing' group bar and 'Hide price when zero' under the 'Chit printing' group bar.

Cost — Specifies the dollar amount required to produce the item. For example, this amount might be the standard cost of the menu item, based on the specific ingredient purchase costs. do not confuse this option with the sell price (Default price) of the item. Effective with CFC v17.5, 'Cost' is moved to the Item Cost function. You must access Maintenance > Labor > Security Roles > POS tab and select a minimum of Read and Edit for the Standard security level for the Item Cost function under the 'Maintenance > Labor' group bar.

Gift card action — Indicates how the system handles the gift card item when you sell it to customers. The system handles the gift card item based on the type of gift cards you purchase from the vendor. **Required Options:** You must select an item type of 'Gift card' to enable this option. Choose from the following options:

Activate card — Activates the gift card when it is approved by the card vendor. This option applies to new and not yet activated cards.

Add value — Use if you order pre-activated cards from your card vendor and allow guests to increase the value of the gift card. This option is available for the Gift card item type only. If you are using Aloha stored Value, this option is not available.

Gift certificate tracking — Indicates you want to keep numerical track of each gift certificate you sell. Basic gift certificate is a feature within the Aloha system to track paper gift certificates. When you select this option, a keyboard appears on the FOH screen each time you sell a gift certificate, allowing you to type the valid gift certificate number. **Required Options:** You must select an item type of 'Aloha gift certificate' to enable this option.

Export Id — Associates the item with an equivalent item in a third-party system.

Group bar: Assignments

Tax group — Indicates the specific group of taxes assigned to the item. A tax group contains one or more taxes. You first set up a tax group, and then assign a tax group to an item. Later, when you order the item on the FOH system, the system applies the applicable taxes to item, based on the corresponding tax group.

Concept — Specifies the type of establishment, or operation to associate with the item, if applicable. A concept is a type of branded operation, that typically sells a focused line of products. Examples include coffee houses, ice cream parlors, donut shops, sandwich shops, to name a few. If you create items in a single master database, for multiple concepts, you can assign the item to a specific concept. For example, assign the item 'banana split' to the concept 'ice cream parlor,' if you sell banana splits only at your ice cream parlors.

Sales/retail category — The Categories function enables you to combine similar menu items into groups that you can use for reporting and forecasting purposes. You can also use categories to effectively manage special item promotions and comps, or to support other features in the system, such as order modes, labor groups, and performance measures.

Although there are three different types of categories, there are two major category types: Sales and Retail.

Use sales category for consumable goods, such as food and beverage items. Quite often, restaurants want to track the sale of their menu items, to know if a certain item is popular with customers, or if they need to replace it with a different menu item. Restaurants can assign a menu item to a sales category, and use various reports to quickly determine the sales level of a specific item. Very generic sales categories might be called Food, Beverages, Liquor, Beer, and Wine. Whereas, more specific sales categories might be called Coffee/Tea, Burgers, Sides, Appetizers, Desserts, or Fountain Drinks.

Use retail category for non-consumable goods, such as shirts, mugs, and other retail items. If a coffee shop wants to know how many coffee mugs they sell, in addition to their beverages, they can assign

coffee mugs to a retail category, and use various reports to quickly determine the number of coffee mugs sold at their establishment.



Caution

Every item you add to the item database must be assigned to at least one Sales or Retail category; otherwise, you may receive errors when you attempt to validate your database.

Group bar: Advanced Pizza

Use the options under the 'Advanced Pizza' group bar to configure the Aloha POS system to support Advanced Pizza functionality only. These options are not intended for use with the classic Pizza Modifier screen. You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display advanced pizza' under the 'Options to display' group bar to expose these options.

Topping — Indicates this item represents a pizza topping. **Required Options: 1)** You must clear 'Pizza' and 'Fraction,' to enable the selection of this option. **2)** Selecting this option enables the Pizza Topping Matrix tab. You need to configure this tab only if you are using pizza topping inventory depletion.

Pizza — Indicates this item represents a pizza menu item. **Related Options: 1)** This option enables the 'Fraction pricing override,' 'Initial topping,' 'Size,' and 'Sum of fractions must equal a whole' options. **2)** You must clear 'Topping' and 'Fraction,' under the 'Pizza' group bar, to allow you to select this option. **3)** Selecting this option enables the Included Topping Matrix tab. You need to configure this tab only if you are using pizza topping inventory depletion.

Fraction — Indicates this item represents a fraction of a pizza. **Required Options: 1)** You must select the fraction represented by this item from the 'Fraction Type' drop-down list to complete this configuration. **2)** You must clear 'Topping' and 'Pizza' to enable the selection of this option.

Fraction type — Specifies the fraction represented by this item. Select from 'Quarter,' 'Half,' and 'Third.' **Required Options:** You must select 'Fraction' to enable this option. **Related Requirements:** You must access Maintenance > Screen Designer and add a button for each pizza fraction you support, using the Fraction button function.

Fraction pricing override — Designates the method for pricing toppings on pizza portions instead of the global method defined in Maintenance > Business > Store > Store Settings tab > Order Entry group for 'Portion pricing' under the 'Pizza' group bar. **Required Options:** You must select 'Pizza' to enable this option.

Initial Topping — Specifies the number of toppings that come on the pizza, by default. For example, if a Veggie Lovers pizza has four toppings, type '4.' The system only uses this number for pizza topping inventory depletion. Leave this blank if you are not using pizza topping inventory depletion. **Required Options: 1)** You must select 'Pizza' to enable this option and for the Included Topping

Matrix tab to appear. **2)** You must configure the Included Topping Matrix tab for this option to have any value. **Related Requirements:** You must configure topping levels in Maintenance > Menu > Advanced Pizza Depletion > Topping Levels.

Size — Specifies the size of the pizza for the system to use for pizza topping inventory depletion. The size you select here does not denote the size of the pizza for order entry. The system only uses this size for pizza topping inventory depletion. Leave this blank if you are not using pizza topping inventory depletion. **Required Options: 1)** You must select 'Pizza' to enable this option. **Related Requirements:** You must first define your pizza sizes in Maintenance > Menu > Advanced Pizza Depletion > Pizza Sizes.

Sum of fractions must equal a whole — Enforces the logic that when you enter an order for a fractional pizza, you cannot complete the item until the sum of all fractions equals a whole. For example, when you enter a 'Halves' pizza and only fulfill one half of the pizza, you cannot enter the next item until you order both halves of the pizza. Select this option for fractional pizza menu items only, such as 'Halves,' 'Thirds,' 'Quarters,' and more. **Required Options:** You must select 'Pizza' to enable this option.

Group bar: Catalog

Available for online — Indicates the selected item can be exported to the BSP catalog service. **Required Options:** You must select 'Export to Platform - Catalog' in Maintenance > Business > Store to expose this option.

Online name — Specifies the online name for this item. Defaults to the item long name if no name specified. **Required Options:** You must select 'Export to Platform - Catalog' in Maintenance > Business > Store to expose this option.

Online description — Specifies the online description for this item. **Required Options:** You must select 'Export to Platform - Catalog' in Maintenance > Business > Store to expose this option.

Link to online image — Specifies the URL associated to the image of this item for use in online systems. **Required Options:** You must select 'Export to Platform - Catalog' in Maintenance > Business > Store to expose this option.

Modifier tab

Use the Modifier tab to attach up to ten modifier groups to an item, as well as define the behavior of an item if you use the item as a modifier. The Modifier tab appears when the item type is 'Standard.'

Group bar: If used as modifier

Use the following options to define additional criteria when using the item as a modifier.

Apply surcharge — Applies a surcharge to the item when you order the item as a modifier for another item. This option is related to the 'Surcharge tax' option. **Related Requirements: 1)** You must define surcharges in Maintenance > Taxes > Surcharge **2)** You must associate a surcharge with a tax group in Maintenance > Taxes > Tax Group **3)** You must then assign the tax group to an item on the Item tab under the 'Assignments' group bar.

Combine price with parent item — Combines the price of the modifier item with the price of the item being modified. If you do not select this option, the price of the modifier and the price of the parent item appear separately on the order screen and the guest check.

Highlight if modifier — Prints the item in reverse type on the chit — white on black on mono-chrome printers, and in red on color printers, when you order the item as a modifier for another item.

Print independently — Prints the modifier on the chit in the same format as a regular item. Normally, a modifier item prints to the same printer as the item it is modifying; however, if you select this option, the modifier item prints to the specific printer group to which it is assigned in Maintenance > Menu > Item Routing.

Display context panel — Indicates a context panel automatically appears when you select the modifier from the guest check window. **Required Options: 1)** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display Context Panels' under the 'Options to display' group bar to expose options related to context panels. **2)** You must access Maintenance > Business > Store > Store Settings tab > User Interface group and select 'Uses context panels' under the 'POS Order Entry Check' group bar to activate the context panel functionality. **3)** You must select a context panel from the 'Context Sensitive Panel' option on the Display Options tab to configure a context panel. **Related Requirements:** You must access Screen Designer and select 'Context Panel' on the Properties dialog box to configure a panel as a context panel.



Reference

Refer to the [Context Panels Feature Focus Guide - HKS346](#) for more information on context panels.

Group bar: Modified by

Modifier 1 through Modifier 10 — Specifies the modifier group to attach to the item. The modifier group provides additional choices for an item. Example groups include ingredients, side items, temperature, and quantity, to name a few. You can attach up to 10 modifier groups to an item. **Related Requirements:** You must define a modifier group in Maintenance > Menu > Modifier Groups, before you can assign a group to an item.

Pricing tab

Use the Pricing tab to define the price for the item. Select from the available methods to price an item: Item Price, Price Level, Quantity Price, and Ask for Price; however, the pricing method you

select depends on the type of item itself. For example, you must use the 'Item Price' method to price a basic gift certificate item.

Group bar: Pricing options

Pricing method — Indicates the specific method to use to determine the price of the item. The default price method is Item Price. **Required Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and clear 'Restrict price edit' under the 'Restrictions settings' group bar to expose all available pricing methods.

Allow sites to change price — Enables each store to change the price of the item using the Price Changes function. If you clear this option, store-level operators can view the price, but they cannot change the price. This check box is available at the 'corporate level' only.

Minimum price — Indicates the lowest price you can assign to the item. The system compares any price changes made to the item, to the minimum and maximum price settings. This option is available for the Standard item type only.

Maximum price — Indicates the highest price you can assign to the item. The system compares any price changes made to the item, to the minimum and maximum price settings. This option is available for the Standard item type only.

Default price — Indicates the default price assigned to the item, unless you specify an alternative pricing method. 'Default price' is available only when the selected price method is 'Item Price.' Every item must have a default price. \$0.00 is a valid default price.

Price level — Designates the price level to use for the item. Price levels enable you to assign a common price to items in a group. For example, if you sell all your medium soft drinks at the same price, you can assign the 'Medium Soft Drink' price level to each medium soft drink item you add to the system. When you must change the price for your medium soft drinks, you can change the price of the 'Medium Soft Drink' price level, and every item to which you assigned the 'Medium Soft Drink' price level, changes accordingly. **Required Options:** 'Price level' is available only when you select 'Price Level' as the pricing method.

Group bar: Quantity price options

Unit name — Indicates the descriptive name for the specified unit of measure. For example, if the unit name is 'lb.,' the price per unit is the price of the item per pound (lb.).

Precision — Designates up to five decimal points to use when you enter a weight measurement for an item on the FOH system. For example, if the precision is 2, you can specify a weight of up to 1/100th of a pound (e.g., 2.50 lb.). If the precision is 3, you can specify a weight of up to 1/1000th of a pound (e.g., 2.495 lb.). Valid entries range from 0 to 5.

Tare — Indicates the weight of the container in which the item is weighed to determine the sell price. The system automatically deducts the tare weight of the container from the weight entered in the FOH system. However, the system does not subtract the tare weight if you use the Scales function to enter the item weight.

Affects inventory — Indicates you want to deduct the item from inventory, when sold.

Apply item quantity to modifiers — Applies the item quantity to any associated modifiers, when an item uses quantity pricing. This is useful in certain environments, such as catering, when you want to order large numbers of items on a single check, and have the system quantify an associated modifier accordingly. For example, if you place an order for 50 hamburgers and include cheese as a modifier, the system orders 50 slices of cheese, as well, as part of the single order entry transaction. If you attach a price to the modifier, the system applies the appropriate price for the designated quantity. This option ensures that the modifier quantity reflects correctly in the PMix report. **Required Options:** You must select 'Affects inventory' to enable this option. **Related Options:** If you select 'Combine price with parent item,' on the Modifier tab, the price of the modifier appears as part of the item price on the guest check.

Price per unit — Indicates the price of the item per unit sold. For example, if the unit of measure for lobster is (pound) lb., the price per unit might be \$7.99 per lb. The price depends on the unit of measure specified in 'Unit name.'

General Settings tab

The General Settings tab enables you to set videos for an item, guest counts, token distribution properties, and more. You can also use this tab to store recipe information for an item. For example, you can store recipes for an item, upload pictures of how an item should look when served, and even store videos that show exactly how to prepare an item.

Group bar: General

Revenue item — Indicates a revenue item that you do not want include in net and gross sales. For example, select this check box for such things as party deposits, amusement or slot machines, admissions, club dues, and more. This option is available for the Standard item type only.

Refill — Configures the item to allow refills of the menu item. 'Refill' is available in Quick Service only and for the Standard item type only.

Guest count weight — Establishes the weight value of the item when counting guests by category. For example, you can set the guest count weight of an item named 'Fajitas for Two' so that it increases the guest count by two when ordered. Valid entries range from 1 to 999, and the default guest count weight is 1.

Label — Designates the specific label to print when you order the item. Use this option if the item requires a printed label. **Related Requirements:** You must first define a label of the Item type in Maintenance > Hardware > Labels.

Product mix report multiplier — Specifies the quantity sold for the item, with one being the default. For example, specify a multiplier of six for the item Bud Lite 6 Pack because you are selling six bottles of Bud Lite in a pack. When you review the Weekly Product Mix report, the report shows that six bottles of Bud Lite were sold. This option has no impact on the Daily Product Mix report. Valid entries range from 1 to 999.

Group bar: Video



Note

Video options are available for only the Standard item type.

Do not show when item — Prevents an item from appearing on the video screens, when you order the item as a regular item and not as a modifier. Use this option with a kitchen display system add-on.

Do not show on summary cell when item — Prevents an item from displaying on the video summary cell, when you order the item as an item and not as a modifier. Use this option with a kitchen display system add-on.

Do not show when modifier — Prevents an item from appearing on the video screens, when you order the item as a modifier for another item. Use this option with a kitchen display system add-on.

Show modifier independently — Displays the modifier on the video screen in the same format as a menu item, even though the item is ordered as a modifier. Use this option with a kitchen display system add-on.

Do not show on summary cell when modifier — Prevents an item from appearing on the video summary cell, when you order the item as a modifier for another item. Use this option with a kitchen display system add-on. For example, you can hide cooking temperature modifiers, such as 'Well Done' from the summary cell.

Show on tracking summary — Enables the item to appear on the kitchen video summary cell. Use this option with a kitchen display system add-on.

Prep time in seconds — Specifies the amount of time, in seconds, that an item takes to prepare before cooking can begin. The time is an indicator for the food prep to have items ready at a specific time. Use this option when one item takes longer to prepare than another. Use this option with a kitchen display system add-on.

Typically, you specify a time for the item that takes the longest to prepare. This time appears on the video monitors to which any other items on the order are sent. When you bump an item with a specified prep time, the system initiates a countdown on the other video monitors. You cannot bump an order until the countdown for the item with the longest prep time begins. If more than one item on the order has a prep time specified, the system uses the longest prep time.

Assembly time in seconds — Specifies the amount of time, in seconds, it takes to assemble the item after cooking. For example, after the burger patty is cooked, it takes a few seconds to assemble the non-cooked items and condiments.

Item Highlight — Designates a highlight color to appear on the kitchen screen, for the selected item.

Group bar: Token distribution



Note

Token distribution options are exposed and available only when you select Maintenance > Business > Additional Features (Corporate Administration) > 'Display token distribution.

Override default token calculation — Indicates you want to override the token distribution amount for the item. If you use token distribution in your operation, all items are subject to the calculation of how many tokens to distribute to the guest based on the subtotal of the check. However, you can control the number of tokens to distribute for certain items, if you wish. For example, if you dispense four tokens for every dollar amount across the board, and you want to dispense ten tokens if the guest orders your largest pizza, you can override the distribution number at the item level.

Tokens per item — Indicates the number of tokens to dispense when you order the item, when you want to override the normal token distribution amount. Type a maximum of four digits. **Required Options:** You must select 'Override default token calculation' to enable this option.

Group bar: Recipe information



Note

Recipe information is available for the Standard item type only.

Auto display recipe — Automatically displays the recipe for the item you select in the FOH. Three red asterisks in the top left corner of the item button indicate items with recipes.

Print recipe frequency — Indicates the number of times you must order the item before a copy of the recipe prints. The recipe prints on a kitchen chit or appears on a remote display system monitor, per the print group or video group to which it is assigned. If you do not want the recipe to print, type '0' in this text box. Valid entries range from 0 to 99.

Recipe text — Enables you to type recipe or ingredient information for the item. For example, if you list the ingredients for item 'chocolate brownies,' a server can view the recipe information on the FOH system to determine if the brownies contain nuts, a common food allergen. Click the **ellipsis (...)** to activate the MemoExEdit dialog box, in which you type the recipe information. The system stores recipes in a .txt format, in the Recipe folder. Type a maximum of 2000 characters.

Recipe bitmap — Assigns an image to a recipe, in addition to text. Store bitmap files in the Recipe folder. The file naming convention is ITM(item number).bmp, where 'item number' is the number of the item in the Item file, with no leading zeros. To assign a new or different image, click the **ellipsis (...)** next to 'Recipe bitmap' to display the Media Files dialog box. Select an image from the list of graphics preloaded into the system database. **Related Requirements:** You must access Maintenance > System Settings > Media files and upload an image before you can select it from the image list.

Recipe movie — Assigns an audiovisual (.avi) file to a recipe in addition to the text. Store the audiovisual files in the Recipe folder. The file naming convention is ITM(item number).avi, where 'item number' is the number of the item in the Item file. To assign a new or different audiovisual file, click the **ellipsis (...)** next to 'Recipe Movie' to display the Media Files dialog box. Select a movie from the list of .avi files preloaded into the system database. **Required Options:** You must access Maintenance > Business > Store > Store Settings tab > User Interface group and select 'Enable multimedia' under the 'Display' group bar to allow a movie to play on the FOH terminal. **Related Requirements:** You must access Maintenance > System Settings > Media files and upload a movie before you can select it from the movie list.

Print tab

The Print tab enables you to define printing options for an item, such as how, and if, the item needs to print on a guest check or a chit.



Note

Multiple, related options also control how an item prints. See the Chit Printing and Check Printing groups located in Maintenance > Business > Store > Store Settings tab for more information.

Group bar: Check printing

Print on check when price is zero — Prints the item on the guest check when you use the item as a modifier; otherwise, the item prints only on the kitchen chit.

Group bar: Chit printing

Highlight if item — Prints the item in alternate type on the chit (white on black on monochrome printers, and in red on color printers) when you use the item as a modifier for another item.

Consolidate first modifier group — Prints and consolidates modifiers based on the first modifier group of the item. Use this option in conjunction with 'Consolidate items with different modifiers' located in Maintenance > Business > Store > Store Settings tab > 'Chit Printing' group under the 'Appearance' group bar. This is for food items, such as steaks, which commonly have prep temperature as the first modifier group. The kitchen can then know how many steaks to prepare based on preparation time. This option is available for the Standard item type only.

Print in bold — Prints the item in bold on the chit.

Justification — Selects the printing justification on the guest check for the item. Available options are left, centered, and right, with left being the default.

Independent mod parent print behavior — Specifies whether the info for the parent item prints along with its independent modifiers.

Mod only — Indicates only the modifier prints.

Mod and parent — Indicates the modifier and its parent item print.

Mod and parent and its mods — Indicates the modifier prints, along with its parent and any other modifiers attached to the parent item.

Hide price when zero — Prevents zero-priced open items from printing on the kitchen chit.

Required Options: You must configure the open item in Maintenance > Menu > Items as 'Ask for description,' 'Ask for Price,' '0.00' as the minimum price, and clear 'Print on check when price is zero' to use this feature effectively. **Documented Version:** v19.3.

Display Options tab

When you configure the system to use system-generated panels for quick combo item selection and item substitution, the system uses a default gray background and black text color for all buttons on these panels.

Using a template panel, you can now change these attributes. You can customize the display properties of individual buttons by assigning a bitmap to the button, changing the text color, and selecting a different background color.

Group bar: Context panel

Context Sensitive Panel — Specifies the context panel to automatically appear when you add this item to the guest check and when you select the item from the guest check window. **Required Options: 1)** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display Context Panels' under the 'Options to display' group bar to expose options related to context panels. **2)** You must access Maintenance > Business > Store > Store Settings tab > User Interface group and select 'Uses context panels' under the 'POS Order Entry Check' group bar to activate the context panel functionality. **Related Requirements:** You must access Screen Designer and select 'Context panel' equals **True** in the Properties dialog box to configure a panel as a context panel. **Related Options:** To associate a context panel to a modifier, you must also access Maintenance > Menu > Items > Modifier tab and select 'Display context panel' under the 'If used as modifier' group bar for the appropriate modifier item.



Reference

Refer to the [Context Panels Feature Focus Guide - HKS346](#) for more information on context panels.

Group bar: Quick combo generated panel display settings

Set text color — Specifies the color to use for the text on the button when the item appears on a quick combo system-generated panel.

Text color — Enables you to select a color for the button text. Select the color from the drop-down color palette.

Set background color — Specifies the color to use for the background of the button when the item appears on a quick combo system-generated panel.

Background color — Enables you to select a color for the button backdrop. Select the color from the drop-down color palette.

Display bitmap — Enables the ability to use a bitmap on the button when the item appears on a quick combo system-generated panel.

Bitmap — Enables you to specify a unique, previously uploaded, bitmap image to apply to the button background.

Hide text — Omits the item short name from appearing on the button, displaying only the bitmap.

Quick Count tab

The Quick Count tab enables you to manage ingredient inventory for an item. You can determine which items you want to track, and for each tracked item, specify exactly *what* you want to track. For example, you can track how many hamburger buns are used and wasted. **Required Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display quick count' under the 'Options to display' group bar to expose this option. **Related Requirements:** If you plan to use the Tracking Items feature on this tab, you must define the items you want to track in Maintenance > Quick Count > Tracking Item.



Tip

The 'Quick Count' tab is available in Quick Service (QS) and Table Service (TS) modes, and for the Standard item type only. Also, see the [Quick Count Feature Focus Guide - HKS316](#) for instructions on how to configure and use Quick Count.

Group bar: Quick count settings

FOH quick count report — Enables the tracking item to appear on the FOH Quick Count report. Press the **Report Quick Count** button on the FOH system, to access this report.

Auto depletion and replenishment — Adjusts the sale and void counts automatically for a tracking item, based on sales, voids, and refunds of the associated menu items (composite tracking items). Do not use this function in conjunction with 'Add,' 'Waste,' and 'Usage' under the 'Display item on these count screens' group bar.

Group bar: Display item on these count screens

Open — Includes the tracking item on the Open Counts report.

Usage — Includes the tracking item on the Usage Counts report.

Close — Includes the tracking item on the Close Counts report.

Add — Includes the tracking item on the Add Counts report.

Waste — Includes the tracking item on the Waste Counts report.

Display on projection item reports — Includes the item on the Prep Projections reports. These reports compile tracking item data from prior days and weeks, to provide forecast information. This option works with the Prep Projections Interface and database.

Group bar: Select tracking items

Tracking item — Displays the list of items to track, each time you sell the selected menu item. For example, a menu item called 'Big Burger' might have the following ingredients defined as tracking items: Beef, Bun, Tomato, and Lettuce. You use a unit of measure, such as unit, lb., oz., or cup, to count these ingredients; therefore, one 'Big Burger' uses 1 Beef Patty, 1 Bun, 1 Tomato Slice, and 1 oz. Lettuce. **Related Requirements:** You must define a tracking item in Maintenance > Quick Count > Tracking Item, before the item can appear for selection.

Usage — Indicates the quantity that applies to the selected composite tracking item. If the unit of measure is one beef patty, type the usage as 1.0000. If the unit of measure is pounds and the quantity used for the composite tracking item is less than one pound, such as a quarter pound (1/4 lb) hamburger, type the usage as .25000.

Gift Certificate tab

Use the Gift Certificate tab to define valid ranges for gift certificate numbers. You must select 'Aloha gift certificate' as the item type to enable this tab.

Group bar: Valid Range

From — Indicates the beginning number for the range of valid gift certificate numbers. Type a maximum of 20 characters.

To — Indicates the ending number for the range of valid gift certificate numbers. Type a maximum of 20 characters.

Dynamic Modifiers tab

Use the Dynamic Modifiers tab to define and add modifiers to an item. You can also use this tab to designate the modifier items within each modifier group that are included (come standard) with an item. Use the 'Move up' and 'Move down' buttons to control the order in which the modifier items

appear on the area of a context panel reserved for Dynamic Modifiers. It only rearranges modifier buttons added using the Dynamic Included Modifier button function.

Modifier Group — Indicates the group to which the modifier item belongs.

Modifier Item — Identifies the modifier item.

Included — Indicates the modifier comes standard with the item. For example, when the food item is a hamburger, lettuce can be an included modifier.

Auto Add — Automatically adds the modifier selected in 'Modifier Item' to a check when you add the menu item you are editing to the guest check. When using modifiers with pizza, any modifier you configure with 'Auto Add' is added to the whole pizza, instead of just to a portion. If you have multiple items configured in the Included Modifiers grid, you should place modifiers configured with 'Auto Add' at the top of the list. **Documented Version:** v15.1.

Substitution charge (QS Only) — Allows you to define rules regarding price differences when substituting an included modifier with another modifier. **Documentation Version:** While visible in TS and QS, this option was introduced in v6.7 and is QS only.

None — Specifies this included modifier cannot be substituted for another modifier from the same modifier group. This is the default selection and counts against the minimum/maximum/free settings for the applicable modifier group only when you add the included modifier to the check. **Required Options:** You must select 'Included' to enable this option.

No charge — Specifies this included modifier can be substituted for another modifier from the same modifier group at no charge. The included modifier and replacement modifier do not count against the minimum/maximum/free settings for the applicable modifier group. **Required Options:** You must select 'Included' to enable this option. **Related Options:** You can override this rule and not make the substitution at all when you access Maintenance > Menu > Modifier Groups > Layout tab and select 'Not eligible for substitution' under the 'Modifier item' group bar for the modifier you are substituting.

Charge difference — Specifies this included modifier can be substituted for another modifier from the same modifier group and charged the difference between the two modifiers. If the price of the included modifier is greater than the replacement modifier, the system prices the substitution at \$0.00, instead of pricing a negative amount. The included modifier and replacement modifier do not count against the minimum/maximum/free settings for the applicable modifier group. **Required Options:** You must select 'Included' to enable this option. **Related Options:** You can override this rule and not make the substitution at all when you access Maintenance > Menu > Modifier Groups > Layout tab and select 'Not eligible for substitution' under the 'Modifier item' group bar for the modifier you are substituting.

Print in kitchen (QS Only) — Enables the dynamic modifier to print in the kitchen. **Required Options:** You must access Maintenance > Business > Store > Store Settings tab > User Interface group and under the 'POS Order Entry Check' group bar, select 'Use included modifiers' to activate the printing of included modifiers in the kitchen and clear 'Print in kitchen.' The 'Print in kitchen' option appears when you select 'Use included modifiers.' **Related Options:** For optimal use, access Maintenance > Menu > Items > Item tab and select a priority for the individual modifier under the 'Auto menu' group bar. **Documentation Version:** While visible in TS and QS, this option was introduced in v6.7 and is QS only.

Takeout checklist — Indicates the item is a sundry item given to a guest who orders this item. This item needs to appear on the bag manifest. For example, when the food item is soup, a plastic spoon should be given to the guest.



Reference

Refer to the [Bag Manifests Feature Focus Guide - HKS338](#) for further information.

Pizza Topping Matrix tab

You must access Maintenance > Menu > Items > Item tab and select 'Topping' under the 'Advanced Pizza' group bar to enable the Pizza Topping Matrix tab.



Reference

Refer to the [Advanced Pizza in QuickService Feature Focus Guide - 1673](#) for more information.

Group bar: Settings

Unit of measure description — Indicates the unit of measure in which you weigh or dispense the topping, such as each, ounce, slice, and more.

Group bar: Topping Matrix

Pizza Size — Relates the size of pizza to the selected topping level.

Topping level — Specifies the topping level to calculate in relation to the pizza size for the pizza topping depletion matrix. **Related Requirements:** You must first access Maintenance > Menu > Advanced Pizza Depletion > Topping Levels and create the pizza topping levels to appear in this list.

Whole qty — Specifies the quantity or amount of the topping you use for the whole pizza, in relation to the size and topping level in place. Once you enter a value, the system automatically populates the '1/2 qty,' '1/3 qty,' and '1/4 qty' columns for you.

1/2 qty — Specifies the quantity or amount of the topping when you order the topping on half of a pizza, in relation to the size and topping level in place. This option automatically populates based on the following calculation: 'Whole qty' / 2. If your operation uses a calculation other than a straight fraction, you can change the value, as needed.

1/3 qty — Specifies the quantity or amount of the topping when you order the topping on a third of a pizza, in relation to the size and topping level in place. This option automatically populates based on the following calculation: 'Whole qty' / 3. If your operation uses a calculation other than a straight fraction, you can change the value, as needed.

1/4 qty — Specifies the quantity or amount of the topping when you order the topping on a quarter of a pizza, in relation to the size and topping level in place. This option automatically populates based on the following calculation: 'Whole qty' / 4. If your operation uses a calculation other than a straight fraction, you can change the value, as needed.

Extra % — Specifies the percentage, from -100 to 999, to adjust to the quantities when you apply an eligible modifier code to the topping. Type in percentage values such as, 50% to indicate half of the regular depletion, 100% to indicate no change in depletion, 200% to double the regular depletion, and more. **Required Options:** You must access Maintenance > Menu > Modifier Codes and select 'Used in pizza matrix' under the 'Settings' group bar to enable a modifier code to be included in the pizza topping depletion matrix and to have a column appear.

Light % — Specifies the percentage, from -100 to 999, to adjust to the quantities when you apply an eligible modifier code to the topping. Type in percentage values such as, 50% to indicate half of the regular depletion, 100% to indicate no change in depletion, 200% to double the regular depletion, and more. **Required Options:** You must access Maintenance > Menu > Modifier Codes and select 'Used in pizza matrix' under the 'Settings' group bar to enable a modifier code to be included in the pizza topping depletion matrix and to have a column appear.

Included Topping Matrix tab

You must access Maintenance > Menu > Items > Item tab and select 'Pizza' under the 'Advanced Pizza' group bar to enable the Included Topping Matrix tab.

On a pizza, when you apply a modifier code to a topping, the quantity can either increase or decrease depending on your operations. You use the modifier codes in the pizza topping depletion matrix to reflect an adjustment in depletion.

Group bar: Included Topping Matrix

Topping Name — Identifies the included topping item.

Unit of measure description — Indicates the unit of measure in which you weigh or dispense the topping, such as each, ounce, slice, and more.

Topping level — Specifies the topping level to calculate in relation with the pizza size for the pizza topping depletion matrix. **Required Options:** You must access Maintenance > Menu > Topping Level and create your pizza topping levels to appear in this list.

Whole qty — Specifies the quantity or amount of the topping you use for the whole pizza, in relation to the size and topping level in place. Once you enter a value, the system automatically populates the '1/2 qty,' '1/3 qty,' and '1/4 qty' columns for you.

1/2 qty — Specifies the quantity or amount of the topping when you order the topping on half of a pizza, in relation to the size and topping level in place. This option automatically populates based on the following calculation: 'Whole qty' / 2. If your operation uses a calculation other than a straight divisor, you can change the value, as needed.

1/3 qty — Specifies the quantity or amount of the topping when you order the topping on a third of a pizza, in relation to the size and topping level in place. This option automatically populates based on the following calculation: 'Whole qty' / 3. If your operation uses a calculation other than a straight divisor, you can change the value, as needed.

1/4 qty — Specifies the quantity or amount of the topping when you order the topping on a quarter of a pizza, in relation to the size and topping level in place. This option automatically populates based on the following calculation: 'Whole qty' / 4. If your operation uses a calculation other than a straight divisor, you can change the value, as needed.

<First Modifier Code>% through <Fourth Modifier Code>% — Specifies the percentage, from -100 to 999, to adjust the quantities when you apply the selected modifier code to the topping. Type percentage values, such as 50% to indicate half of the regular depletion, 100% to indicate no change in depletion, 200% to double the regular depletion, and more. **Required Options:** You must first access Maintenance > Menu > Modifier Codes and select 'Used in pizza matrix' under the 'Settings' group bar to enable a modifier code to be included in the pizza topping depletion matrix and to have a column appear. You can select up to four modifier codes and the name of the selected modifier code appears in the column heading.

SKU Numbers tab

Use the SKU Numbers tab to associate SKU numbers to an item for scanning with a scanner, instead of selecting the item on the screen. SKU numbers can be alphanumeric. You can associate multiple SKU numbers to a single item.

Group bar: SKU numbers



Note

SKU' options are available for only the Standard item type. If you print multiple bar codes on the chit for the item, only the first five SKU numbers print.

Number — Associates the string of alphanumeric characters for the Stock Keeping Unit (SKU) to an item to use with a scanner. This is typically shown on a bar code. Additional entries allow you to assign more than one SKU number to an item. The SKU number must be unique across all records. Type a maximum of 15 alphanumeric characters.

Items > Production Line Assembly tab

Use the Production Line Assembly tab to optionally configure a modifier that is included with the menu item and is only used with production assembly line screen types in Aloha Kitchen > Maintenance > Hardware > Kitchen Screen. You can use an implied modifier to indicate the type of the item, but it is not considered a base ingredient pulled from the make-line. For example, a taco might use a crispy corn tortilla, by default, but the tortilla is not housed in a hotel pan on the make-line. The implied modifier appears below the base item name on the production assembly line screen.



Reference

Refer to the [Production Assembly Line Feature Focus Guide - HKS1548](#) for more information.

Group bar: Implied Modifiers

Select the **modifier** from the 'Available' list and click >> to move the **modifier** to the 'Included' list.

Item Cook Times

Select **Maintenance > Menu > Item Cook Times** to access this function.

Use Item Cook Times to define cook times for all items on your menu. When the kitchen receives an order, the item with the longest cook time appears on the kitchen display first and the remaining items appear by cook time in descending order. This allows all items in an order to finish cooking at the same time. Use this option with Aloha Kitchen or Video Display System. This option is available for the Standard item type only.



Tip

Unless you use Aloha Configuration Center (CFC) as your management tool, you can configure only the global default record for this function. You configure cook times for all items and maintain those cook times in this global record. [Refer to Chapter 1, Introducing Aloha Configuration Center, for more information.](#)

The cook time for the item that takes the longest to prepare appears on the video monitors to which any other items on the order are sent. This time equals to delay times that appear on screen for other menu items. When you bump an item with a specified delay time, the system initiates a countdown on the other video monitors. You cannot bump a delayed order until the countdown for the item with the delay time begins. If more than one item on the order has a delay time specified, the system uses the longest delay time. For example, a pizza takes 10 minutes to cook; a salad takes one minute to prepare. Set the pizza to have a cook time of 600 seconds. When you bump the pizza, indicating start of preparation, the cook time of the pizza item appears as a delay time on the video monitor where the salad appears. The delay time counts down to zero. The delay time indicates the time the pizza will be ready and enables the food prep to prepare the salad and have it ready at the same time the pizza is ready.

Item Cook Time tab

Use the Item Cook Time tab to configure the default settings for menu item cook times.

Group bar: Settings

Name — Identifies the global default record. This option, by default, is read only.

Group bar: Cook Time Assignments

Use the >> and << arrows to move items between the 'Available' list and the 'Included' list. The column headings that appear in the 'Included' and 'Available' lists are as follows:

The column headings that appear in the 'Available' list are as follows:

Number — Indicates the item number.

Name — Identifies the item.

An additional column appears in the 'Included' list.

Cook time — Indicates the amount of time, in seconds, that an item takes to prepare. To set or change this amount, you click 'Cook time' for each item and type the cook time in seconds.

Standard Modifiers tab

Use the Standard Modifiers tab to alter the default cook time for items you can prepare in multiple ways, such as meat that can be rare, medium rare, medium, and well done. **Required Options:** You must access Maintenance > Business > Installed Products > Global tab and select 'Uses Kitchen' under the 'Products installed' group bar to enable this tab.

Note

Cook times on this tab override settings on the Item Cook Time tab.

Use the >> and << arrows to move items between the 'Available' list and the 'Included' list. The column headings that appear in the 'Available' list are as follows:

Number — Indicates the item number

Name — Identifies the item.

Two additional columns appear in the 'Included' list.

+/- Percent — Specifies the amount of time, as a **percentage of the default time**, that the system needs to alter the cook time of the item.

+/- Seconds — Specifies the amount of time, in **seconds**, that the system needs to alter the default cook time of the item.

Note

You must include the minus sign (-) to subtract time from the original item cook time.

Advanced Modifiers tab

Use the Advanced Modifiers tab to override settings on both the Item Cook Time tab, and the Standard Modifiers tab, with a specific pairing of an item and a modifier. Typically, you use this when a cook time adjustment is already in place or when you want to use a pairing at all times, such as a kids' meal Hamburger with small fries.

Note

Cook times on this tab override settings on the Item Cook Time tab and the Standard Modifiers tab.

Group bar: Cook Time Assignments

Item — Identifies the item.

Modifier item — Identifies the modifier.

Combined cook time — Specifies the combined cook time of both the item and the modifier.

Item Cost

Select **Maintenance > Menu > Item Cost** to access this function.

Effective in CFC v17.5, you manage the costing of items using the Item Cost function. The 'Cost' option is no longer available in the Items function, preventing the need to create versions of the item record in Maintenance > Menu > Items. Instead, you accomplish any store-specific need to override an item cost by creating a store version of the primary Item Cost record. The Item Cost function supports real time updates. If you modify/enter an item cost using this function, a prompt to perform a real-time update appears.

Upgrade Path: Upon upgrade to CFC v17.5, all currently existing items migrate over to the Item Cost function. Any item with a stated cost in the Items function appears in the Included list in the Item Cost function; any item without a cost appears in the Available list. You must access Maintenance > Labor > Security Roles > POS tab and make the appropriate security selections to provide access to the Item Cost function. The 'All' Security level already provides full access but you may need to make the appropriate selections for the 'Standard' access level under the Maintenance > Menu group bar.

Item Cost tab

Group bar: Settings

Identifies the selected item cost record. For Aloha Manager users, there is only one item cost record. If you are a CFC user, it is possible to create multiple item cost records.

Group bar: Cost Assignments

Two selection lists appear on the Item Cost tab. The Available list, on the left side of the screen, contains the items in the database that are available for you to establish an item cost. The Included list, on the right side of the screen, displays the items for which an item cost has already been established.

Use the >> and << arrows to move items between the 'Available' list and the 'Included' list. The column headings that appear in the 'Included' and 'Available' lists are as follows:

Number — Indicates the item number.

Name — Identifies the item.

Two additional columns appear in the 'Included' list.

Cost — Indicates the cost of the item at the store. To set a different item cost for a store or region, you must create a store version of the Item Cost record. To set or change the cost of an item, click the >> to move the item to the Included list. The cursor focus is on 'Cost,' ready for you to type the cost of the item.

Primary cost — Indicates the primary cost of the item entered into the corporate record. This is for CFC users only.

Item Routing

Select **Maintenance > Menu > Item Routing** to access this function.

Use the Item Routing function to assign priorities to items and reroute printers and video monitors by item.

Item Routing tab



Tip

Unless you use Aloha Configuration Center (CFC) as your management tool, you can configure only the global default record for this function. You configure routing for all items and maintain that routing in this global record. [Refer to Chapter 1, Introducing Aloha Configuration Center, for more information.](#)



Reference

Unless you use Aloha Configuration Center (CFC) as your management tool, you can configure only the global default record for this function. You configure routing for all items and maintain that routing in this global record. [Refer to Chapter 1, Introducing Aloha Configuration Center, for more information.](#)

Use the Item Routing tab to specify, item by item, the printers and video groups that receive each item once you bump an order from the order entry screen on the FOH.

Group bar: Settings

Name — Identifies the global default record. This option, by default, is read only.

Group bar: Routing assignment

Use the >> and << arrows to move items between the 'Available' list and the 'Included' list. The column headings that appear in the 'Available' list are as follows:

Number — Indicates the item number. This option is read-only.

Name — Identifies the item. This option is read-only.

Additional column headings that appear in the 'Included' list are as follows:

Printer group — Indicates the specific printer or group of printers to which the Aloha POS system routes the item when you order it on the FOH system.



Note

Multiple, related options also control how an item prints. See the Chit Printing group located on the Store Settings tab in Maintenance > Business > Store.

Video group — Indicates the specific video screen or group of video screens to which the Aloha POS system routes the item when you order it on the FOH system.



Note

Multiple, related options also control how an item appears. See the Video Group tab located in Maintenance > Hardware > Video Groups.

Priority — Specifies the order in which items print on the kitchen chit and appear in the video cell. A valid range is from 1 to 255, with an item assigned a priority of 1 appearing above an item assigned a priority of 255. For example, you might assign a priority of 1 to your appetizers so that they appear before your entrées, which you assign a priority of 255, to ensure the kitchen knows to cook the appetizer items before the entrées. This option is only available for the Standard item type. **Related Options:** To sort items printed on a chit based on their priority, access Maintenance > Business > Store > Store Settings tab > Chit Printing group and select 'Sort items by priority' under the 'Kitchen Chit > Content' group bar.

Jobcodes

Select **Maintenance > Labor > Jobcodes** to access this function.

Job codes are user-defined job descriptions that categorize employees and tasks into logical groupings. Job codes provide a description for the role an employee performs for the job assigned to that job code. They control whether an employee can enter orders, the parameters under which they can take breaks, whether they can operate a cash drawer, and more. Use this function to define the tasks for each job code, as you do when writing a job description. For example, kitchen employees typically do not have order entry privileges so you would clear 'Order entry' under the 'Order entry' group bar on the Order Entry tab. Once you define the necessary job codes, access Maintenance > Labor > Employees and assign at least one job code to each employee.

Jobcode tab

The Jobcode tab enables you to configure basic information about the job. Use the Jobcode tab to define the requirements for the job code, such as a training mode, if a password expires, to log in to the FOH, if the employee uses a cash drawer, and more.

Group bar: Identification

Name — Identifies the job code, such as Cashier, Bartender, Server, and Manager. Type a maximum of 10 characters.

Description — Identifies the full name of a job code, such as Cashier, Bartender, Server, and Manager. Type a maximum of 20 characters.

POS icon — Associates a specific image with a job code. Images appear on order entry terminals, and serve as a visual representation of the job code. This is useful when you assign more than one job code to an employee. **Related Requirements:** You must import an image, whether standard or custom, using the Media Files function, before you can select it from the image list.

Job Group — Designates the job group under which an employee clocked in under this job code is to function. Job groups bundle job codes into a single grouping to make it easier to control the menus that appear based on the job code under which an employee is operating. **Related Requirements:** You define job groups in Maintenance > Labor > Job Groups.

Job Group for tip share — Designates the job group under which an employee clocked in under this job code receives tip-share distribution amounts. **Related Requirements:** You define job groups in Maintenance > Labor > Job Groups.

Training mode (unpaid) — Indicates an employee clocked in under this job code is working in 'training mode.' A 'training mode' job code allows access to all rights and menu navigation. The system records training sales in the Trans.log file but the sales do not appear in any Aloha reports or have any effect on payroll information. Training sales print only to the local chit printer. They do not open the drawer, nor do they display on a video screen or a pole display. The words 'Training Mode'

print at the top of all guest checks and chits. Additionally, guest checks appear in green instead of blue on order entry terminals. **Required Options:** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on this tab to enable this option.

Group bar: Time and Attendance

Shift required to clock in/out — Requires an employee clocked in under this job code to clock in and clock out at the beginning and end of each shift. **Related Options:** This option does not enable order entry capabilities unless you also select 'Order entry' on the Order Entry tab.

Automatically clock in/out when ringing an order — Enables an employee clocked in under this job code to perform order entry functions without clocking in first. Use this option for managers and other exempt employees. This job code, and the labor hours generated with it, do not appear on any FOH or BOH labor report. You typically assign only a manager job code to managers because, if you assign more than one job code to the employee, the system prompts the employee to clock in. The system automatically records the clock in and clock out punches for each business day, and you access these punches using the Audit report. **Related Options:** Selecting this option selects and then hides the following options: 'Exclude from Labor Scheduling' under the 'Time and Attendance' group bar on the Jobcode tab, 'Order entry' under the 'Order Entry' group bar on the Order Entry tab, and 'Do not print or export' under the 'Report Settings' group bar on the Financial tab.

Exclude from Labor Scheduling — Enables an employee clocked in under this job code to clock in without being scheduled to work, in accordance with the punctuality rules. Use this option for managers and other exempt employees. **Required Options: 1)** Access Maintenance > Business > Store > Store Settings tab > Labor group and define punctuality rules under the 'Scheduling' group bar. **2)** Selecting 'Automatically clock in/out when ringing an order,' selects and then hides this option automatically.

Allow login without an Occasion — Prevents an employee clocked in under this job code from logging in to the Aloha POS system unless you define and activate an occasion.

Export code — Associates a secondary job code to the selected job code in the Aloha POS system. This export code is used by a third-party software system and you can configure it to appear on the labor report. Type a maximum of 10 characters.

Suppress the shift time out on printed schedule on FOH — Prevents the shift time out for an employee clocked in under this job code from appearing on the schedule when you configure the Aloha POS system to print employee schedules from the FOH.

Enable prompt for punch adjustment acknowledgement at clock in — Enables an acknowledgment prompt to appear when an employee for whom you adjust a punch clocks in under this job code. The message appears on the following business day. The employee must approve or reject the adjustment. **Related Options:** This option enables 'Require manager approval to clock in if acknowledgment is declined.'

Group bar: Breaks

Break type — Indicates whether the break is paid, unpaid, or both for an employee clocked in under this job code. 'None' is also a valid option. **Required Options:** You must select 'Shift required to clock in/out' to enable this option.

Allow contiguous shifts — Enables an employee clocked in under this job code to add together the hours worked from consecutive shifts when qualifying for a break rule, only if they clock out and back in within a specified time. **Required Options:** You must access Maintenance > Business > Store > Store Settings tab > Labor group and select 'Consider contiguous shifts when qualifying breaks' under the 'Employee settings' group bar to use this option.

Order Entry tab

Use the Order Entry tab to further define the functions and tasks related to a Quick Service or Table Service environment, such as assigning order entry screens and queues, self-banking and others.

Group bar: Order entry

Order entry — Indicates order entry screens appear to enable an employee clocked in under this job code to ring sales or close checks. **Required Options:** You must select 'Shift required to clock in/out' on the Jobcode tab to enable this option.

Interface — Defines an employee clocked in under this job code as a COM interface employee not subject to the restrictions in place for checking out with open checks. This option applies to interface employees configured for use with products that inject orders into the POS system using Aloha Take-out. Consumer Self Ordering (CSO2) injects orders using Aloha Transaction Gateway; therefore this option does not apply to interface employees configured for CSO2. **Related Requirements:** You must select the Jobcodes tab in Maintenance > Labor > Employees and assign this job code to each interface employee not subject to the restrictions in place for checking out with open checks. For example, when using Aloha Takeout, assign this job code to each ATO interface employee so that the interface employee can check out while checks are still open in the Aloha Takeout queue.

Can get checks from other employees — Allows an employee clocked in under this job code the ability to get open checks from other employees. Use this option primarily in a cashier environment where cashiers close checks opened by an employee, such as when a cashier closes a tab that was opened with the bartender. The Get Check button appears on the FOH order entry screen. **Required Options: 1)** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **2)** You must select 'Order entry' to enable this option. **Related Requirements:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels, and add the Get Check button function to a panel to appear on the FOH.

Automatically exit on close check — Automatically logs out an employee who is clocked in under this job code when they close a check. The employee must log back in for the next transaction. If the change due message appears when they close a check, the system logs them out when they dismiss the message. This feature overrides any screen timeout settings assigned to the job code. This feature does not apply to transactions entered into Aloha through a hotel PMS (property management system) or through external computer programs using Aloha Connect. **Documented Version:** v12.3.

Allow item lookup — Enables an employee clocked in under this job code to look up any item. The Item Lookup screen appears when you select the Item Lookup button. **Required Options: 1)** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **2)** You must select 'Allow add item' to enable ordering the item after you look it up on the FOH screen. **Related Requirements:** You must also access Screen Editor and add the Item Lookup button function to a panel to display on the FOH screen.

Allow add item — Enables an employee clocked in under this job code to add an item after they look it up using the Item Lookup feature. When ordering, forced modifiers accompany the item as normal. **Required Options: 1)** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **2)** You must select 'Allow item lookup' to enable this option.

Exclude Takeout employees from checkout restriction — Enables an employee clocked in under this job code to check out, even if there are open checks in the queue. **Required Options:** You must select 'Used by Takeout' under the 'Settings' group bar on the Takeout tab to define this job code as one for use by Aloha Takeout.

Allow multi-terminal login — Allows employees clocked under this job code to log in to and use multiple terminals simultaneously during a shift. For example, select this option for an employee who needs to take orders on one terminal and accept payments on another terminal. **Documented Version:** v19.3.

Order entry screen — Indicates the default order entry screen that appears to an employee clocked in under this job code, when they access a FOH terminal. **Required Options:** You must select 'Shift required to clock in/out' on the Jobcode tab to enable this option.

Order entry queue — Indicates the order entry queue that appears, upon log in, to an employee clocked in under this job code.

Screen timeout — Specifies the time, in seconds, a screen remains active before timing out and requiring a password to log back in.

No default screen — Ensures an employee clocked in under this job code does not automatically see a default order entry screen. Every employee that requires access to a FOH terminal does not necessarily need access to the order entry system. For example, kitchen staff required to clock in and out need access to a FOH terminal; however, they do not need access to the order entry screens.

When you restrict access to default screens, neither the default screen assigned to the job code, nor the default screen assigned to the FOH terminal, appear for every employee clocked in under the selected job code. The only screens that appear are the Login screen and Clock In/Out screen.

Required Options: You must select 'Shift required to clock in/out' on the Jobcode tab to ensure an employee clocked in under this job code can access the Clock In/Out screen.

Group bar: Delivery

Delivery driver — Defines an employee clocked in under this job code as a driver, capable of receiving order assignments from the restaurant and delivering them to customer locations. **Required Options:** You must select 'Shift required to clock in/out' on the Jobcode tab to enable this option.

Related Options: Selecting this option enables 'Can assign orders to self.'

Can assign orders to self — Enables a delivery driver to view orders ready for delivery in the system, and to self-assign the orders without the need for authorization from a manager or another employee. **Required Options:** You must select 'Delivery driver' to enable this option.

Prompt for mileage — Enables a delivery driver to track mileage for reimbursement. **Required Options:** You must select 'Delivery driver' to enable this option.

Delivery dispatcher — Enables an employee clocked in under this job code to assign completed orders to drivers and to sign the drivers out and back in as they leave and return. **Required Options:** You must select 'Shift required to clock in/out' on the Jobcode tab to enable this option.

Delivery order taker — Enables an employee clocked in under this job code to receive delivery orders into the system and to authorize the orders for preparation. **Required Options:** You must select 'Shift required to clock in/out' on the Jobcode tab to enable this option.

Financial tab

Use the Financial tab to define how you want the system to handle cash drawers, tips, reports, and security for a specific job code.

Group bar: Financial

Uses cash drawers — Allows an employee clocked in under this job code to operate a cash drawer. The most employees you can assign to a cash drawer is one, however, you can use public cash drawers to assign more. **Required Options:** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **Related Options:** Selecting 'Bartender' under the 'Order entry' group bar on the Order Entry tab appears to disable this option, however the default value for this option for a bartender is true, and gives bartenders access to cash drawers. **Related Requirements:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels, and add the Assign Drawer or Manage Drawers button to a panel to appear on the FOH screen.

Use count screens — Enables an employee clocked in under this job code to use a money counter to enter or confirm their starting bank. **Required Options: 1)** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **2)** You must select 'Uses cash drawers' to enable this option.

Can be assigned to multiple drawers — Enables assignment of more than one cash drawer at a time to an employee clocked in under this job code. **Required Options: 1)** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **2)** You must select 'Uses cash drawers' to enable this option.

Can use all global public cash drawers — Enables an employee clocked in under this job code to access a public cash drawer with a primary owner. This option is usually reserved for managers, floor supervisors, or any other managerial personnel. **Required Options:** You must select 'Uses cash drawers' to enable this option. **Related Options:** Access Maintenance > Hardware > Cash Drawers > Cash Drawer tab and select 'Public cash drawer' and 'Global public cash drawers' under the 'Settings' group bar.

Self banking — Assigns cash accountability to an employee clocked in under this job code, but not assigned to a specific cash drawer. **Required Options:** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option.

Can assign self to cash drawer — Enables an employee clocked in under this job code to assign themselves to their own cash drawer. **Required Option:** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **Related Requirements: 1)** You must also access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Assign Drawer button to a panel to display on the FOH. **2)** When you select 'Can assign self to cash drawer' in conjunction with 'Uses cash drawers,' and only one drawer is defined for the terminal at which an employee clocked in under this job code logs in, the Aloha POS system bypasses the drawer selection process and automatically assigns the drawer.

Prompt for starting bank — Requires an employee clocked in under this job code to enter a starting bank. **Required Options: 1)** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **2)** You must select 'Can assign self to cash drawer' to enable this option. **Related Requirements:** You must also access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Assign Drawer button to a panel to display on the FOH.

Reconcile payments at checkout — Requires an employee clocked in under this job code to declare payment counts upon checking out for over/short calculations. **Required Options: 1)** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **2)** Selecting this option enables 'Tenders to declare.'

Tenders to declare — Indicates if an employee clocked in under this job code must reconcile all tenders or only cash tenders at the end of each shift. **Required Options:** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option.



Reference

Refer to the [Drawer Reconciliation Feature Focus Guide - HKS310](#) and [Employee Reconciliation Feature Focus Guide - HKS307](#) for additional information on reconciling tenders.

Number of attempts — Stipulates the number of times an employee clocked in under this job code can attempt to reconcile tenders before a manager must approve the reconciliation. **Required Options: 1)** You must select 'Shift required to clock in/out' on the Jobcode tab to enable this option. **2)** You must select 'Reconcile all tenders' in 'Tenders to declare' to enable this option. **Related Options:** To enable an employee to override a reconciliation when the number of attempts lapses, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Force reconciliation' under the 'Employee' group bar.

Display unused tender types — Lists all defined tender types on the reconciliation screens, even if the tender was not used as a form of payment. This allows a manager to adjust a tender type that would ordinarily not appear in the list during reconciliation since the tender type was not used for the given shift. Use this option when you use payment reconciliation as opposed to drawer reconciliation. **Required Options:** You must select 'Order entry' on the Order Entry tab and 'Reconcile payments at checkout' on the Financial tab to enable this option. **Documented Version:** v12.3.

Audit selected coupons — Requires an employee clocked in under this job code to perform a coupon audit count at checkout for all qualifying coupons. **Required Options:** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option. **Related Options: 1)** For each coupon type you must access Maintenance > Payments > Promotions > Coupon tab and select 'Audit count at checkout' under the 'Coupon' group bar to qualify a coupon for audit count. **2)** Selecting this option enables 'Number of attempts.'

Number of attempts — Stipulates the number of times an employee clocked in under this job code can attempt to reconcile coupons before a manager must approve the reconciliation. **Required Options:** You must select 'Audit selected coupons' to enable this option. **Related Options: 1)** To enable an employee to override a reconciliation when the number of attempts lapses, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Force reconciliation' under the 'Employee' group bar.

Group bar: Tips

Store collects employee tips — Enables the store to collect credit card tips and gratuities for employees clocked in under this job code. This option enables the store to collect all credit card tips from sales without affecting the cash owed amount on the checkout report. For Table Service opera-

tions, use this for environments where a cashier accepts payments from guests instead of the server and the cashier is liable for the tips when reconciling the drawer. For Quick Service operations accepting online orders, tips coming from online sales are collected by the store. In both environments, the system declares the full amount of the credit card tips received for each employee and managers determine the best method for distributing the amounts. **Required Options:** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to expose this option. **Documented Version:** v19.9.

Must declare tips at clock out — Requires an employee clocked in under this job code to declare tips upon clocking out. The FOH Enter Tips screen appears when the employee touches the Clock Out button. **Required Options:** You must select 'Shift required to clock in/out' under the 'Time and Attendance' group bar on the Jobcode tab to enable this option.

Threshold type — Specifies the threshold to use when an employee clocked in under this job code declares their tips. **Required Options:** You must select 'Must declare tips at clockout' to enable this option.

Amount — Specifies the tip threshold, by job code, based on the fixed amount entered in the 'Low tip threshold amount' text box, per job code. Use this method for non-order entry employees who receive and must declare tips, such as bussers and dishwashers. For example, if the fixed tip threshold is \$2.00, then the employee must declare at least \$2.00. **Required Options:** To define the tip threshold for this declaration method, type an amount in the 'Low tip threshold amount' text box, located on this tab.

Hourly amount — Specifies the tip threshold, by job code, based on the greater of the following calculations: employee's charged tips OR job code tip threshold x employee's work time. For example: The employee works three hours, receives \$10.00 in charged tips, and has a tip threshold value of 5. The employee must declare at least \$15.00 because the job code tip threshold x employee's work time equals \$15.00, which is greater than the employee's charged tips of \$10.00. **Required Options:** To define the tip threshold for this declaration method, type a value in the 'Low tip threshold amount' text box, located on this tab.

Hourly amount plus charged tips — Specifies the tip threshold, by job code, based on the following calculation: (job code tip threshold value x employee's work time) + (employee's charged tips - employee's tip distribution). For example, if the employee works 3.45 hours, receives \$13.00 in charged tips, has a tip % threshold value of 5, and pays \$3.00 in tip share, then the employee must declare at least \$27.25. **Required Options: 1)** To define the tip threshold for this declaration method, type a value in 'Low tip threshold amount.' **2)** If you access Maintenance > Business

> Store > Store Settings tab > Labor group and clear 'Allow tipped declaration less than charged tips' under the 'Employee settings' group bar and the employee calculated tip declaration is less than the charged tips, the employee must declare at least the amount of their charged tips.

Charged tips minus percentage — Specifies the tip threshold, by job code, based on the following calculation: (employee's charged tips - tip share distribution) - (job code tip threshold x employee's tippable sales). If the calculated tip threshold amount is less than zero, the system rounds up and uses the value of zero. For example, if the employee enters \$215.00 in tippable sales, receives \$13.00 in charged tips, has a tip % threshold value of 1, and pays \$3.00 in tip share, then the employee must declare at least \$7.85. **Required Options: 1)** To define the tip threshold for this declaration method, type a percentage in 'Low tip threshold percentage.' **2)** If you access Maintenance > Business > Store > Store Settings tab > Labor group and clear 'Allow tipped declaration less than charged tips' under the 'Employee settings group bar and the employee calculated tip-declaration method is lower than the charged tips, the employee must declare at least the amount of their charged tips.

Global percentage — Specifies the tip threshold, by store, based on the following calculation: store tip % threshold x employee tippable sales. For example, if an employee had \$100 in tippable sales and the store tip % threshold is 10%, the employee must declare at least \$10.00. Selecting 'Global Percentage' disables 'Low tip threshold amount' and 'Low tip threshold percentage.' **Required Options:** To define the tip threshold for this tip-declaration method, access Maintenance > Business > Store > Store Settings tab > Labor group and type an amount in 'Default tip-share percent' under the 'Tip share' group bar.

Percentage — Specifies the tip threshold, by job code, based on the following calculation: job code tip % threshold x employee's tippable sales. For example, if the employee's tippable sales is \$100.00 and the tip % threshold is 10%, then the employee must declare at least \$10.00. **Required Options:** To define the tip threshold for this declaration method, type a percentage in the 'Low tip threshold percentage' text box, located on this tab.

Percentage of cash sales — Specifies the tip threshold, by job code, based on the following calculation: (job code tip % threshold x employee cash sales - employee tip-share % of cash sales) + (employee charged tips - tip refunds - employee tip-share % of charged sales). For example, if the employee had \$150.00 in tippable sales, but \$100.00 of the amount was tendered to cash, and the tip % threshold is 10%, the employee must declare at least \$10.00. The Aloha POS system adds any charged tips for the total tip declaration. **Required Options:** You define the tip threshold for this tip-declaration method in 'Low tip threshold' under the 'Tips' group bar.

Note

When you select 'Percentage of cash sales,' the Aloha POS system separates the transactions tendered to cash from the transactions tendered to non-cash, and the employee must declare against their cash tippable sales only. The Aloha POS system later adds the charged tips to the tip declaration.

Low tip threshold amount — Specifies the tip threshold value, between 0.00 to 9999.99, based on the tip-declaration method you select in 'Threshold type.' **Required Options:** You must select a 'Threshold type' of 'Amount,' 'Hourly amount,' or 'Hourly amount minus percentage' to enable this option. When you select 'Amount,' 'Hourly amount,' or 'Hourly amount minus percentage,' the Aloha POS system treats the value for this option as an amount.

Low tip threshold percentage — Specifies the tip threshold value, between 0.00 to 9999.99, based on the tip declaration method you select in 'Threshold type.' **Required Options:** You must select 'Percentage,' or 'Charged tips minus percentage' to enable this option. When you select 'Percentage,' or 'Charged tips minus percentage,' the Aloha POS system treats the value for this option as a percentage.

Maximum tip threshold percentage — Specifies the maximum percentage of cash tips an employee clocked in under this job code can declare. Use this option to safeguard against an employee accidentally declaring an unusually large amount. Type 0.00 to specify no maximum amount. **Required Options:** You must select a 'Threshold type' of 'Percentage of cash sales' to enable this option.

Display low tip warning — Shows a warning message when an employee clocked in under this job code declares tip amounts lower than the defined threshold, or minimum, amount. **Required Options:** You must select 'Must declare tips at clock out' to enable this option.

Low tip warning message — Designates the custom message to appear when an employee clocked in under this job code declares tip amounts lower than the threshold amount. **Required Options: 1)** You must select 'Display low tip warning' to enable this option. **2)** You create custom messages in Maintenance > Messaging > Guest Check Message.

Override function — Specifies the override action for the Aloha POS system to take when an employee clocked in under this job code declares a tip amount lower than the tip threshold.

Complete checkout — Closes out the employee even though the employee declared an amount lower than the calculated tip threshold amount.

Re-prompt for declared tips — Displays the FOH Enter Declared Tips screen again until the employee declares an amount equal to or higher than the calculated tip threshold.

Require manager approval — Allows a manager to approve the employee clockout, rather than clock the employee out or allow the employee to enter their tips again. **Related Options:** To allow an employee, typically a manager, to approve a clockout, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Approve clock out' under the 'Employee' group bar.

Auto-declare tips if clock out doesn't occur — Automatically declares the charged tips received by an employee clocked in under this job code, when an employee forgets to clock out and a manager or the End-of-Day process must perform the clock out for them. This ensures that at least the

charged-tips amount is declared based on the following calculation: charged tips - tip refund - default tip-share amount contributed. **Required Options:** You must select 'Must declare tips at clockout' to enable this option. **Related Options:** When you access Maintenance > Business > Store > Store Settings tab > System group and select '24-hour operation' under the 'Day/Time' group bar and you access the Labor group and select 'Auto-Clock Out at End of Day' under the Employee Settings group bar, the Aloha POS system continues to automatically declare the charged tips the employee received. When you select '24-hour operation' and you clear 'Auto-Clock Out at End of Day,' the Aloha POS system does not automatically declare tips because it automatically clocks the employee back in after running the End-of-Day process.



Reference

Refer to the [Tip Declaration Feature Focus Guide - HKS317](#) for more information on tip declaration.

Group bar: Report settings

Do not print or export — Prevents the labor information for an employee clocked in under this job code from printing on the following reports: ADP export file, Coconut Code export file, Real World Payroll export file, Labor report, and the Overtime Warning report. **Related Options:** Selecting this option disables 'Exclude from Labor Report Summary section.'

Exclude from Labor Report Summary section — Excludes the labor information for an employee clocked in under this job code from the summary section of the Labor report only. The Aloha POS system adds a disclaimer message that the grand total may not match the labor information on the report. **Required Options:** You must clear 'Do not print or export' to enable this option. **Documented Version:** 14.2.

Do not update FOH Flash Report — Excludes the labor hours and dollars generated for an employee clocked in under this job code from the FOH Flash report and the BOH Hourly Sales report. You can use this option to exclude data from managers and give the report a more realistic total if their pay is defined as higher than other employees.

Consider jobcode as salaried for close payroll — Excludes the labor information for an employee clocked in under this job code from appearing on hourly labor reports. This option enables you to more accurately track your labor costs.

Group bar: Hourly sales and labor report

Revenue center — Designates the specific revenue center under which to report sales for any employee clocked in under this job code on the Hourly Sales and Labor report and the FOH Sales Report (v6.7 and later), when you configure the reports to split hourly sales and labor information by revenue center. 'None' is a valid option. This option only applies to these sales reports and has no bearing on revenue center assignment for a guest check. **Related Options:** To report information per revenue center, select 'Split Hourly Sales and Labor by Revenue Center' in the Reports function.

Group bar: Security

Uses password — Requires an employee clocked in under this job code to use a password to log in. **Related Options:** Selecting this option enables 'Password expires.'

Password expires — Specifies that the password for an employee clocked in under this job code has an expiration date. Upon expiration, the employee must select another password for use. **Required Options:** You must select 'Uses password' to enable this option.

Days until password expires — Specifies the number of days to lapse before a password expires and an employee clocked in under this job code must change it. Valid entries range from 0 to 99999. **Required Options:** You must select 'Password expires' to enable this option.

Automatically perform checkout when clocking out — Enables an employee clocked in under this job code to perform a clock out without performing a server checkout. Use this option for environments that use drawer checkouts. If configured, the employee must still perform any other checkout functions, such as coupon audit, tip share, and more. **Related Options:** When you access Maintenance > Labor > Jobcodes > Jobcodes tab and select 'Automatically clock in/out when ringing an order' under the 'Time and Attendance' group bar, it selects and then disables this option.

Require manager approval for checkout — Requires an employee clocked in under this job code to have manager authorization to check out. The manager approval screen appears when the employee selects Checkout on the FOH screen. **Related Options:** To provide an employee the ability to approve checkouts, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Approve checkout' under the 'Employee' group bar.

Require manager approval for clockout — Requires an employee clocked in under this job code to have manager authorization to check out. The manager approval screen appears when the employee selects the Checkout button. **Related Options:** To provide an employee the ability to approve clock outs, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Approve clock out' under the 'Employee' group bar.

Clock in not required for manager approval functions — Enables an employee clocked in under this job code to approve actions that require manager approval without being clocked in. **Required Options:** This job code must be the first job code you assign to the employee on the Jobcodes tab in Maintenance > Labor > Employees.

Takeout tab

Use the Takeout tab to further define the functions and tasks related to an environment where takeout orders are common and expected.

Group bar: Settings

Used by Takeout — Indicates an employee clocked in under this job code performs the functions in Aloha Takeout, and activates the options that are specific to a take out or a delivery environment.

Related Options: Selecting this option exposes all other options on this tab.

Driver — Indicates an employee clocked in under this job code works as a driver.

Driver fee on split check — Reflects the driver fee as evenly distributed on the driver checkout report for split checks. For example, when the driver fee is \$2.00, and you split a check four ways, the driver checkout report reflects \$2.00, not the \$8.00 that appears if you clear this option.

Required Options: You must select 'Used by Takeout' to expose this option. **Documented Version:** v14.1.

Enable variable driver fee — Allows you to pay your delivery drivers a driver fee based on delivery zones. Use the ATO delivery area feature and set different fees for various delivery zones. ATO returns the amount of the driver fee to the Aloha POS for labor and wage reporting. **Required Options:** You must select 'Used by Takeout' to expose this option. **Related Requirements:** You must use Aloha Takeout (ATO) and define your delivery zones for this feature. **Documented Version:** v14.1.

Driver commission group — Associates this job code with a driver commission group, which allows you to pay drivers a commission based on certain conditions. **Documented Version:** v19.3
Related Requirements: You create a driver commission group in Maintenance > Takeout Configuration > Driver Commission Groups.

Show Takeout on login — Indicates an employee clocked in under this job code logs in directly to Aloha Takeout, instead of to the Aloha POS system. **Required Options:** You must select 'Used by Takeout' to expose this option.

Display 'Aloha' button — Allows an employee clocked in under this job code to see and use the Aloha button on the Takeout user interface to move to the Aloha POS. Clearing this option disables the Aloha button on the user interface. **Required Options:** You must select 'Used by Takeout' to expose this option.

Aloha Takeout initial order filter — Determines the type of order that appears when an employee clocked in under this job code selects an order-related screen. If the employee needs to see other order types, they can easily select those order types using Aloha Takeout. **Required Options:** You must select 'Used by Takeout' to expose this option.

1st generation return screen — Indicates the default screen an employee clocked in under this job code first accesses when returning to Aloha Takeout from the Aloha POS system, if the site installation uses the first-generation user interface. All other screens are quickly accessible, regardless of the

screen selected here. **Required Options:** You must select 'Used by Takeout' to expose this option.

Related Options: 1) This option overrides the '1st generation return screen' option under the 'Aloha Takeout' group bar in Maintenance > Hardware > Terminals > Terminal tab. Your choices include:

- Customer Management
- Order Management
- Point Of Sale
- Future Order Management

2nd generation return screen — Determines the default screen an employee clocked in under this job code first accesses when returning to Aloha Takeout from the Aloha POS system, if the site installation uses the second-generation user interface. All other screens are quickly accessible, regardless of the screen selected here. **Required Options:** You must select 'Used by Takeout' to expose this option. **Related Options: 1)** This option overrides the '2nd generation return screen' option under the 'Aloha Takeout' group bar in Maintenance > Hardware > Terminals > Terminal tab. Your choices include:

- Customer Lookup
- Order Pickup
- Point Of Sale
- Driver Dispatch
- Future Order
- Driver Management
- All Order List

Aloha return screen — Indicates the Quick Service screen to which an Aloha Takeout employee navigates upon selection of the Aloha button from the Aloha Takeout interface. **Related Options: 1)** You must select 'Used by Takeout' to expose this option. **2)** This option overrides the 'Aloha return screen' option under the 'Aloha Takeout' group bar in Maintenance > Hardware > Terminals > Terminal tab when you select an interface terminal as the terminal type. **3)** This option overrides the global 'Default Aloha screen' option in Maintenance > Takeout Configuration > Takeout Settings > Panel Options tab.

Aloha tender screen — Indicates the Quick Service screen to which the Aloha Takeout employee navigates upon selection of the tender button from the Aloha Takeout interface. **Related Options: 1)** You must select 'Used by Takeout' to expose this option. **2)** This option overrides the 'Aloha tender screen' option in Terminal Maintenance when you select an interface terminal as the terminal type. **3)** This option overrides the global 'Aloha Tender screen' option in Maintenance > Takeout Configuration > Takeout Settings > Panel Options tab.

Allow print receipt — Allows an employee clocked in under this job code to print the receipt for an order in Aloha Takeout. Clearing this option disables the Print Receipt button on the user interface. This option is selected by default. **Required Options:** You must select 'Used by Takeout' to expose this option.

Allow adjust payment — Allows an employee clocked in under this job code to adjust the payment applied to an order in Aloha Takeout. Clearing this option disables the Adjust Payment button on the user interface. This option is selected by default. **Required Options:** You must select 'Used by Takeout' to expose this option.

Allow modify order — Allows an employee clocked in under this job code to modify and tender an order in Aloha Takeout. Clearing this option disables the Modify and Tender buttons on the user interface. This option is selected by default. **Required Options:** You must select 'Used by Takeout' to expose this option.

Allow close checks — Allows an employee clocked in under this job code to close a check in Aloha Takeout. Clearing this option disables the Close Check and Picked Up buttons on the user interface. This option is selected by default. **Required Options:** You must select 'Used by Takeout' to expose this option. **Related Options: 1)** When you clear this option with 'Auto fulfill orders' selected in Maintenance > Takeout Configuration > Takeout Settings > Options tab, tendering the order does not automatically close a pick up order in Aloha Takeout. A message stating "The order will remain opened in Aloha Takeout as you do not have access to close checks" appears. **2)** When you clear this option with 'Close checks on apply payment' selected in Maintenance > Takeout Configuration > Takeout Settings > Options tab, tendering the order does not automatically close an order in both the POS and ATO. A message stating "The order will remain opened in Aloha and Aloha Takeout as you do not have access to close checks" appears.

Allow dispatch driver — Allows an employee clocked in under this job code to dispatch a driver in Aloha Takeout. Clearing this option disables the Dispatch button on the user interface. This option is selected by default. **Required Options:** You must select 'Used by Takeout' to expose this option.

Allow return driver — Allows an employee clocked in under this job code to designate a driver returned from their route in Aloha Takeout. Clearing this option disables the Return button on the user interface. This option is selected by default. **Required Options:** You must select 'Used by Takeout' to expose this option.

Allow recall driver — Allows an employee clocked in under this job code to recall a driver in Aloha Takeout. Clearing this option disables the Recall button on the user interface. This option is selected by default. **Required Options:** You must select 'Used by Takeout' to expose this option.

Group bar: Screens

Screen name — Indicates the screens to which an employee clocked in under this job code has access. **Required Options:** You must select 'Used by Takeout' to expose this option. You can select one or all the following screens from the Type list box.

- Customer Lookup
- Order Pickup
- Driver Dispatch
- Driver Management
- Future Order
- All Order List
- Mapping Driver Dispatch

Job Groups

Select **Maintenance > Labor > Job Groups** to access this function.

Job groups make it easier to control the menus that appear based on the job code under which an employee operates. Use the Job Groups function to identify job groups into which to bundle multiple job codes. If you use Tip Share Distribution, a separate job group specific to tip share makes it easier to distribute tip-share contributions based on the area of the restaurant in which an employee works. For example, in an establishment with a bar and dining area in both the downstairs and upstairs, create a 'Downstairs' and an 'Upstairs' job group and then select Maintenance > Labor > Jobcodes, access an upstairs bartender job code, and select 'Upstairs' from the 'Job Group for tip share' drop-down list.

After you identify your job groups, assign each job group to any function with a provision for using them. For example, select Maintenance > Labor > Jobcodes, select a job code, and designate the job group to correlate with that job code in both 'Job Group' and 'Job Group for tip share,' if applicable.

The Job Group tab enables you to create and identify your job groups.

Name — Identifies the job group.

Labels

Select **Maintenance > Hardware > Labels** to access this function.

Use the Labels function to print an item or guest check label based on your business needs.

Group bar: Settings

Name — Identifies the label.

Type — Indicates the type of label to print.

Item — Prints a label that contains information about the item in the intended container. If you select 'Print barcode' under the 'Print options' group bar, the label prints with a barcode that, when scanned, returns information about the item. If the container includes more than one item, a label prints for each item in the order. The Aloha POS system then uses the item information on the label to ring up the item. **Note:** The label conveys no guest check information.

Guest check — Prints a label that contains guest check information about the item or items in the intended container. If you select 'Print barcode' under the 'Print options' group bar, the label prints with a barcode that, when scanned, returns information that is used with the Get Check function to pull up the customer check. You can then close the check if the guest is in the store, or you can transfer it to a driver for delivery. If you select 'Guest check' as the label type, you cannot assign the label to a menu item. If you subsequently change the selected label to 'Guest check,' prior label assignments to menu items involving the label become invalid.

Printer group — Determines the locations where the label prints.

Text Size — Specifies the default text size to use on the label. Choose from Large, Medium, and Small.

Group bar: Print options

Print barcode — Enables bar code printing on the label. When scanned, the bar code prompts the system to display information about the item or the full guest check, depending upon the label type you chose under the 'Settings' group bar.

Print item price — Prints the item price on the label. **Required Options:** You must select a label type of 'Item' to enable this option.

Print name — Prints the customer name on the label.

Print address — Prints the customer address on the label.

Group bar: Print area

Label width inches — Specifies the width of the label. The label manufacturer provides this information.

Label height inches — Specifies the height of the label. The label manufacturer provides this information.

Margin inches — Specifies the desired width of the left label margins. The label manufacturer provides the margin limits.

Group bar: Order modes

Print label for all order modes — Prints a label for all order modes. Selecting this option disables 'Order mode #1' through 'Order mode #4.'

Order mode #1 through Order mode #4 — Select a message to print for each order mode using the drop-down selection list. **Required Options:** You must clear 'Print label for all order modes' to enable manual selection of order modes. **Related Requirements:** You define order modes in Maintenance > System Settings > Order Mode.

Labor Groups

Select **Maintenance > Labor > Labor Groups** to access this function.

The Labor Groups function enables you to combine sales/general categories with job codes to track labor costs associated with different areas in your restaurant. For example, to keep track of Front-of-House (FOH) and Back-of-House (BOH) labor, create a labor group that includes cashiers and other FOH job codes. Create another labor group that includes cooks and other BOH job codes. Only existing sales categories and job codes are available for selection. To preserve labor data integrity, you can indicate if the labor group you create is for reporting purposes, or for other job code-related reasons, such as interactive messages or tip-share distribution.

Job Code types

When you create a new labor group in the database, you must select the type of group you want to create. Select from the following types, when you click the New drop-down arrow to add a new labor group:

Labor Reporting allows you to view labor costs for each labor group, as a percentage comparison to specific sales/general categories.

Jobcode Group allows you to use job codes to manage job code-related tasks such as interactive messages or tip-share distribution. These tasks may or may not be report-related.

Labor Group tab

The Labor Groups tab enables you to add basic information about a labor group.

Group bar: Identification

Name — Identifies the labor group. Type a maximum of 25 characters.

Type — Indicates the type of labor group. This option is read-only.

Categories tab

The Categories tab lists the sales categories available to place in the selected labor group. You must select Labor Reporting as the type, to enable the Categories tab. You define categories in Maintenance > Menu > Categories.

Use the >> and << arrows to move categories between the 'Available' list and the 'Included' list. Select up to 20 sales categories per labor group.



Note

You must remove categories from the 'Included' list, before you can delete a labor group.

Jobcodes tab

The Jobcodes tab lists the job codes available to place in the selected labor group. You define job codes in Maintenance > Labor > Jobcodes.

Use the >> and << arrows to move job codes between the 'Available' list and the 'Included' list. Select up to 99 job codes per labor group.



Tip

You must remove job codes from the 'Included' list, before you can delete a labor group.

Loyalty Providers

Select **Maintenance > Guest Experience > Loyalty Providers** to access this function.

The Loyalty Providers function enables you to designate the loyalty provider for your site and to establish the communication between the Aloha Point-of-Sale (POS) and the loyalty provider. The communication between the provider and the POS is accomplished using Aloha Transaction Gateway, which is an interface management application that broadens the connectivity of the Aloha POS, and enables restaurants to connect to various external applications. Contact your NCR representative for help in configuring the POS to communicate with your loyalty provider through Aloha Transaction Gateway.

Loyalty Provider types

The Aloha POS system currently supports the following loyalty providers in this function: Aloha Loyalty, Bally CMP, EMN8 Loyalty, GiveX Mobile Couponing, Aloha Enterprise Loyalty, and Generic and BSP Generic. You must select one of these loyalty providers from the list box when you click the New drop-down arrow to create a new loyalty provider record; however, some providers with which you can integrate may use Generic instead. If your provider is not in this list, you may be able to take advantage of the Generic loyalty provider type for your loyalty needs.

Provider tab

The Provider tab identifies the loyalty provider and allows you to select which stores in your network use the selected provider as their loyalty provider. When you select a provider from the Type list box, a tab specific to the provider of your choice appears.

Custom tab

Use the Custom tab to enter custom variables to support features that are not yet available in the Integrations.cfg file for a provider. This tab appears for every provider type but is not valid for Generic Loyalty.

BSP Generic tab

This tab appears when you click New and select BSP Generic from the Type list box.

Group bar: Client

Number of milliseconds to wait for host connection — Designates how long, in milliseconds, the system waits for a connection, when attempting to contact the loyalty host. Valid entries include one (1) for wait indefinitely, and whole numbers representing milliseconds.

Allow manual card entry — Designates whether an employee can manually type a loyalty card number into the system. When cleared, this option requires the employee to slide a magnetic stripe card or scan a bar code.

Employee with security permission to remove discounts from check — Designates the employee, usually a manager, that has security permission to remove discounts from a check.

Job Code for the employee with security permission to remove discounts from check —

Specifies the job code under which the employee designated in 'Employee with security permission to remove discounts from check' must log in to have security permission to remove discounts from the check.

Loyalty magcard track number — Designates the track on a magnetic card the system uses to specify the loyalty program.

Loyalty reminder message for cashier — Specifies optional message text to appear to an employee as they access the Tender screen, when no loyalty card was entered for a guest check.

Default Comp Id — Designates the Comp ID to use when the loyalty host does not provide a Comp Id for order level discounts.

Default Promo Id — Designates the Promo ID to use when the loyalty host does not provide a Promo Id for item level discounts.

Enable Email and Numeric Assign — Allows you to configure button text for 'Email Assign Button Text' and 'Numeric Assign Button Text' buttons. **Related Options:** Selecting this option exposes 'Email Assign Button Text' and 'Numeric Assign Button Text.'

Email Assign Button Text — Designates the text to appear on the Email Assign button. **Required Options:** This option appears only when you select 'Enable Email and Numeric Assign.'

Numeric Assign Button Text — Designates the text to appear on the Numeric Assign button. **Required Options:** This option appears only when you select 'Enable Email and Numeric Assign.'

Send All finalize — Sends all closed checks to the loyalty host, even if no loyalty identifier is applied to the check.

Send All process — Sends all check activity (order items, add non loyalty discounts, etc.) to the host, even if no loyalty identifier is applied to the check.

Sign-up screen title — Designates the title to appear on the Membership Sign-Up screen (loyalty main screen).

Suppress award message on assign — Turns off the message on assignment when the host returns reward approval choices.

Group bar: Dialogs

The group bars available under the Dialog group bar allow you to customize the Loyalty screen provided by BSP Generic Loyalty. This is the default screen that appears when you touch the Loyalty button without first designing a custom loyalty screen using Screen Designer.

Group bar: Dialogs > Appearance

Button background gradient start — Designates the starting color in the color palette to use for the gradient background on a button.

Button background gradient middle — Designates the middle color in the color palette to use for the gradient background on a button.

Button background gradient end — Designates the ending color in the color palette to use for the gradient background on a button.

Button font color — Designates the color in the color palette to use for text that appears on a button.

Dialog logo image — Allows you to select an image to appear on the input screen. **Required Options:** You must upload the bitmap image to the BMP folder before it appears in the selection box.

Border color — Designates the color in the color palette to use for the screen border.

Background gradient start — Designates the starting color in the color palette for the gradient background.

Background gradient end — Designates the ending color in the color palette for the gradient background. Selecting the same color as 'Background gradient start' provides a solid, single-color screen background.

Group bar: Dialogs > Search options

Enable email search — Indicates your loyalty provider supports email search. **Required Options:** The BSP Generic loyalty provider supports selecting any combination of the available search options: email, phone, and name; however, you must clear all search options not supported by your loyalty provider.

Enable phone search — Indicates your loyalty provider supports phone number search. **Required Options:** The BSP Generic loyalty provider supports selecting any combination of the available search options: email, phone, and name; however, you must clear all search options not supported by your loyalty provider.

Enable name search — Indicates your loyalty provider supports member name search. **Required Options:** The BSP Generic loyalty provider supports selecting any combination of the available search options: email, phone, and name; however, you must clear all search options not supported by your loyalty provider.

Barcode tab

This tab only appears for the BSP Generic Loyalty provider type.

Group bar: Settings

Barcode image format — Designates the type of bar code image supported by your loyalty provider. Valid options include QR code, Aztec, Code 128, Data matrix, and Maxicode.

Barcode image generated width — Specifies the bar code width, in pixels, that your printers can support.

Barcode image generated height — Specifies the bar code height, in pixels, that your printers can support.

Skip text embedded in barcode image — Allows you to print bar codes that do not include any identifying text.

String to find in check text to insert message — Allows you to specify a code string above which to print the bar code on a check. For example, the string <LINEFEED>4</LINEFEED> tells the system to skip four blank lines and then print the bar code above that point.

Barcode — Specifies the bar code image that prints on a check. For example, the string <PRINTBITMAP>[image name]</PRINTBITMAP> designates the bar code to use, where image name is the file name of the bar code image you uploaded to the BMP folder.

Barcode text — Specifies the bar code text to print as part of the bar code, if you did not select 'Skip text embedded in bar code image.' For example, the string %BARCODETEXT%[text string] where text string specifies the text to embed in the bar code.

Command Buttons tab

This tab only appears for the BSP Generic Loyalty provider type.

The Command Buttons tab is useful when you have several loyalty buttons you need to define but limited space on the order entry screens. This tab allows you to visually design a screen with up to 10 loyalty commands that you access using a single POS button.

Group bar: Main screen configurable button

You must first select a button from the two columns on the left to activate the options available under this group bar.

Custom — Allows you to specify a command in 'Custom Button Command.' If cleared, 'Custom Button Command' toggles to 'Button Command,' and you must then select a command from the drop-down list. **Related Options:** 'Custom' is cleared, by default. You must select this option to expose 'Custom Button Command.'

Button Command — Designates the command to assign to the button. Available commands are None, Assign, Assign Email, Assign Alpha, Process, Coupon, and Coupon Alpha. **Related Options:** You must clear 'Custom' to expose this option.

Custom Button Command — Designates the command to initiate when using this button. **Related Options:** You must select 'Custom' to expose this option.

Button Text — Allows you to specify the text to appear on the button.

Generic tab

This tab appears when you click New and select Generic from the Type list box.

Group bar: Client

IP address — Designates the IP address to use when connecting to the third-party loyalty provider; typically this is the IP address of the BOH site controller. Contact the loyalty host for specific information.

Port — Designates the active port through which the third-party loyalty provider will be listening. Contact the loyalty host for specific information.

Open item to use for member entry — Designates the item created for adding a loyalty card number to the check. This option is not supported effective ATG 15.x and later because ATG handles this for you.

Open item button text — Designates the text to appear on the button used to add a loyalty card number to the check. This option is not supported effective ATG 15.x and later because ATG handles this for you.

POS type identifier for loyalty host — Designates the POS identifier the third-party loyalty provider uses to identify your system. Contact the loyalty host for specific information.

Number of milliseconds to wait for host connection — Designates how long, in milliseconds, the system waits for a connection, when attempting to contact the loyalty host. Valid entries include: -1=wait indefinitely, and whole numbers representing milliseconds.

Allow manual card entry — Designates whether an employee can manually type a loyalty card number into the system. When cleared, this option requires the employee to slide a magnetic stripe card or scan a bar code.

System employee to remove discounts — Designates the employee, usually a manager, that has security permission to remove discounts from a check.

Jobcode for system employee — Specifies the job code under which the employee designated in 'System employee to remove discounts' must log in to have security permission to remove discounts from the check.

Loyalty magcard track number — Designates the track on a magnetic card the system uses to specify the loyalty program.

Loyalty balance inquiry message — Specifies the message text to appear when showing the loyalty balance.

Loyalty reminder message for cashier — Specifies optional message text to appear to an employee as they access the Tender screen, when no loyalty card was entered for a guest check.

Lookup message type — Designates the method to use when looking up a loyalty member. Contact the loyalty provider for more information.

Member lookup —

Filter account —

Group bar: Dialogs

The group bars available under the Dialog group bar allow you to customize the Loyalty screen provided by Generic Loyalty. This is the default screen that appears when you touch the Loyalty button without first designing a custom Loyalty screen using Screen Designer.

Group bar: Dialogs > Main screen

Dialog logo image — Allows you to select the image to appear on the main menu screen. **Required Options:** You must upload the bitmap image to the BMP folder before it appears in the selection box.

Border color — Designates the color in the color palette to use for the screen border.

Background gradient start — Designates the starting color in the color palette to use for the gradient background.

Background gradient end — Designates the ending color in the color palette to use for the gradient background. Note: Selecting the same color as 'Background gradient start' provides a solid, single-color screen background.

Assign button label — Designates the text to appear on screen on the Assign button.

Activate button label — Designates the text to appear on screen on the Activate button.

Renew button label — Designates the text to appear on screen on the Renew button.

Refund button label — Designates the text to appear on screen on the Refund button.

Balance button label — Designates the text to appear on screen on the Balance button.

Group bar: Dialogs >Message

Dialog logo image — Allows you to select the image to appear on the message screen. **Required Options:** You must upload the bitmap image to the BMP folder before it appears in the selection box.

Border color — Designates the color in the color palette for the screen border.

Background gradient start — Designates the starting color in the color palette for the gradient background.

Background gradient end — Designates the ending color in the color palette for the gradient background. Note: Selecting the same color as 'Background gradient start' provides a solid, single-color screen background.

Group bar: Dialogs > Input

Dialog logo image — Allows you to select the image to appear on the input screen. **Required Options:** You must upload the bitmap image to the BMP folder before it appears in the selection box.

Border color — Designates the color in the color palette to use for the screen border.

Background gradient start — Designates the starting color in the color palette for the gradient background.

Background gradient end — Designates the ending color in the color palette for the gradient background. Note: Selecting the same color as 'Background gradient start' provides a solid, single-color screen background.

Enable email search — Indicates your loyalty provider supports email search. **Required Options:** Aloha Generic Loyalty supports selecting any combination of the available search options 'email,' 'phone,' and 'name.' If your loyalty provider does not support one or more of these options, you must clear the unsupported options.

Enable phone search — Indicates your loyalty provider supports phone number search. **Required Options:** Aloha Generic Loyalty supports selecting any combination of the available search options 'email,' 'phone,' and 'name.' If your loyalty provider does not support one or more of these options, you must clear the unsupported options.

Enable name search — Indicates your loyalty provider supports member name search. **Required Options:** Aloha Generic Loyalty supports selecting any combination of the available search options 'email,' 'phone,' and 'name.' If your loyalty provider does not support one or more of these options, you must clear the unsupported options.

Group bar: Dialogs > Keyboard

Dialog logo image — Allows you to select an image to appear on the keyboard screen. **Required Options:** You must upload the bitmap image to the BMP folder before it appears in the selection box.

Border color — Designates the color in the color palette to use for the screen border.

Background gradient start — Designates the starting color in the color palette for the gradient background.

Background gradient end — Designates the ending color in the color palette for the gradient background. Note: Selecting the same color as 'Background gradient start' provides a solid, single-color screen background.

Group bar: Dialogs > Loyalty activation

Use this group bar to customize the screen that appears when you activate a loyalty card.

Dialog logo image — Allows you to select the image to appear on the loyalty activation screen.

Required Options: You must upload the bitmap image to the BMP folder before it appears in the selection box.

Border color — Designates the color in the color palette to use for the screen border.

Background gradient start — Designates the starting color in the color palette for the beginning of a gradient background.

Background gradient end — Designates the ending color in the color palette for the end of a gradient background. Note: Selecting the same color as 'Background gradient start' provides a solid, single-color screen background.

Group bar: Dialogs > Member select

Use this group bar to customize the screen that appears when perform a search for a loyalty member.

Border color — Designates the color in the color palette to use for the screen border.

Background gradient start — Designates the starting color in the color palette for the beginning of a gradient background.

Background gradient end — Designates the ending color in the color palette for the end of a gradient background. Note: Selecting the same color as 'Background gradient start' provides a solid, single-color screen background.

Barcode tab

This tab only appears for the Generic loyalty provider type.

Group bar: Settings

Barcode image format — Allows you to select the type of bar code image supported by your loyalty provider. Valid options include QR code, Aztec, Code 128, Data matrix, and Maxicode.

Barcode image generated width — Specifies the bar code width, in pixels, that your printers can support.

Barcode image generated height — Specifies the bar code height, in pixels, that your printers can support.

Skip text embedded in barcode image — Allows you print bar codes that do not include any identifying text.

String to find in check text to insert message — Allows you to specify a code string above which the printer will print the bar code on a check. For example, the string <LINEFEED>4</LINEFEED> prints four blank lines. The system searches for those four blank lines and prints the bar code above that point.

Barcode — Allows you to specify the bar code image that prints on a check. For example, the string <PRINTBITMAP>[*image name*]</PRINTBITMAP> designates the bar code to use where *image name* is the file name of the bar code image you uploaded to the BMP folder.

Barcode text — Allows you to specify the bar code text that prints as part of the bar code if you did not select 'Skip text embedded in bar code image.' For example, the string %BARCODETEXT%[*text string*] allows you to specify the text to embed in the bar code.

Group bar: Receipt message

Message line — 'Displays the message as you build it using 'Edit message line'

Edit message line — Allows you to build the message by selecting from a list of variables that appear in a Message Line Builder list box when you click 'Edit message line.'

Main Screen Message

Select **Maintenance > Messaging > Main Screen Message** to access this function.

Use the Main Screen Message function to display a message on the Front-of-House (FOH) login screen. If one is attached, the message can also appear on a pole display. The first and second messages defined in the Main Screen Message function appear, by default, on the left and right sides of the order entry terminal login screen; however, you can also schedule a message to appear using an event. To schedule a message to appear, select Maintenance > System Settings > Event Schedule and use the following event types, as necessary:

- Set Left Message
- Set Right Message

Main Screen Message quick tips:

- There are eight lines available for message text.
- Each line has a maximum of 20 characters.
- By default, message ID 01 appears on the left side of the FOH terminal and message ID 02 appears on the right. You must create an event to display any other messages.
- When you create a message for a pole display, leave a blank line between the lines of text so the message scrolls across the screen with a pausing effect, making the message easier for the customer to read. The main screen message always appears on top; however, unlike other message types in the Aloha POS system, you cannot target main screen messages to different areas of the restaurant, or to different job codes.



Reference

Refer to [Event Schedule](#) for more information regarding using an event to schedule a message to appear.

Message tab

Use the Message tab to define basic information about the message, as well as the message text itself.

Group bar: Settings

Name — Identifies the main screen message.

Display on pole — Enables the main screen message to appear on a pole display, if one is attached to the FOH terminal. The main screen message continues to appear on the order entry terminal, as before.

Group bar: POS login screen message

Line 1 through Line 8 — Specifies the text to appear on the main screen of the order entry terminal or pole display. The entry in the first line serves as the identification name for the message. Use the additional lines for typing the message as you want it to appear on the main screen or pole display. Type a maximum of 20 characters per line.

Media Files

Select **Maintenance > System Settings > Media Files** to access this function.

The Aloha POS system uses image and video files to enhance the Front-of-House (FOH) order entry screens and provide training for your employees. For example, in the Jobcodes function, you can reference an image that represents the job function, to assist employees in selecting the correct job code when they log in to the FOH. Other functions in which you can use image files include Items, Movie, Order Modes, Kitchen Screens, Tenders, and more.

The POS system supports the following types of media files, where appropriate: BMP, PNG, JPG, AVI, ASF, SWF, WMV, and JS.



Tip

You must access Maintenance > Business > Store > Store Settings tab > User Interface group and select 'Enable multimedia' under the 'Display' group bar to allow a movie to play on the FOH terminal.

Quick Service supports all file types on buttons and panels; however, you still have to import the images through the Media Files function.

When you first install the configuration management tool, either Aloha Configuration Center or Aloha Manager, you must perform a data import, which also imports, among other things, the existing media files from the local site. After a successful import, use either the Import Multiple Media Files utility or the Media Files function to view and manage media files, when you need to import updated or additional media files. The Import Multiple Media Files utility allows you to select and import media files into your database individually or in bulk, and automatically logs you out of the system when you are done. You need to log back in to continue. The Media Files function is better used for single file imports.

Media File types

The choices that appear for 'Application' include the products and features installed on the system. The application you select determines the media file types supported by and available for selection from 'File Type.'

Media Files quick tips:

There are several tips to know before uploading media files:

- When you are performing a new CFC or Aloha Manager installation and you do not have an existing database to import, either at a site or on a lab system, place your media files in a folder on the file server, and use either the Import Multiple Media Files utility or the Media Files function to import the files into the database.
- After a successful import, the media files become part of the CFC or Aloha Manager database. For this reason, you cannot just copy a file with the same name into the BMP folder at the site and

have the system recognize it as an updated file. You need to perform an import so that it becomes part of the database and wait for the next data refresh for it to become active.

- If you create a new media file after your initial import, you must create a record in Media Files, to import the new file, and then reference it to make it available for the next export.
- The Media Files function also manages the images for the floating logo (Logo1.bmp, Logo2.bmp, and so on). Be sure to include these media files as part of your import.
- Once you successfully import the necessary media files, access the applicable function and select the media file for reference. The system only includes referenced media files in the export to the site.
- At the end of every business day, as part of the End-of-Day process, the system removes all media files at the site, and then exports only referenced media files back to the site, to prevent unnecessary files from being copied to the site.

Media Files tab

Use the Media Files tab to import a new media file into the configuration management tool.

Group bar: Identification

Name — Identifies the media file. This is the name you reference when you create a reference to a media file. Once you type a name, it should remain static so that any references to the media file do not break.

Application — Identifies the product for which the media file is intended, for organizing, filtering, and exporting purposes. This option is read only

Original File Name — Identifies the original name of the file you initially selected for upload. This option is read-only.

File Type — Indicates the graphic, video, or script media file type, such as BMP, AVI, WMV, VBS, and more. The file types that appear correspond to the file types supported by the application you select from the Application list box.

Select File — Enables you to browse and select the media file you wish to upload to the host database. The file name cannot be the same name as one you have already successfully imported. For this reason, to update an existing media file for which you already have a reference, create a file with a slightly different name. For example, if you need to update the Icon5.bmp media file, name the new file Icon5_New.bmp. **Required Options:** You must make a selection in 'File Type' to expose this option.

Export location — Specifies the folder to which to export the file. Choose 'Kitchen folder' for all Kitchen image files except those intended for use with a kitchen screen of the 'Customer order display' type, in which case, choose 'Customer Display folder.' **Required Options:** You must select 'Aloha Kitchen' as the media file type to expose this option.

Preview tab

Use the Preview tab to view the selected file.

Minor Exemptions

Select **Maintenance > Labor > Minor Exemptions** to access this function.

Employees younger than a certain age are required by law to adhere to certain break rule requirements. If the employee skips a required break, or is not allowed to take a required break, the Aloha POS system records a break rule violation. The term minor refers to a person under a certain age, depending upon jurisdiction and application, but is typically 16, 18, or 21.

Minors who are married or who have a high school diploma on file are relieved from the meal break requirements. To prevent the Aloha POS system from recording a violation based on age alone, you can set up various exemption reasons using the Minor Exemptions function.

Note

Minor Exemptions work in conjunction with employee maintenance. The exemption reasons you create in this function populate the list of reasons to exempt a minor from minor break rules on the 'Status' tab in the Maintenance > Employees function.

Minor Exemptions tab

Use the Minor Exemptions tab to create one reason for each qualifying exemption.

Group bar: Settings

Description — Identifies the reason to exempt a minor from qualifying for a break configured for minors. Common examples are: Has marriage license, has high school diploma, military personnel, and others.

Modifier Codes

Select **Maintenance > Menu > Modifier Codes** to access this function.

Modifier codes allow you to send additional information about a modifier to the kitchen staff, such as the preparation method, omissions, substitutions, and additions. When needed, you first select a modifier code on the Front-of-House (FOH) screen and then select the affected modifier. The modifier code indicator precedes the modifier on the screen and appears on the guest check, chit, and video screen. For example, NO Onions or XT Mustard.

The Modifier Codes function includes a standard set of modifier codes that are considered protected, meaning you cannot delete them (Delete button is disabled), nor can you change their functionality. They are active, by default; however, you can change the active status and color of these modifier codes. To prevent a modifier code from appearing, clear 'Active.'

Code ID	Default Modifier Code	Indicator
1	With	<empty>
2	No	NO
3	Extra	XT
4	Side	SD
5	Message	MSG
6	Sub	SUB
7	For	FOR
14	Light	LT
15	Heavy	HV
16	Only	ONLY
17	Half	1/2
18	Quarter	1/4
19	Add	ADD
202	Included	INCL

Modifier Codes quick tips:

There are several rules or tips to follow when you use modifier codes:

- A modifier code must be set to active before you can use it on a FOH terminal.
- You cannot delete record numbers 1 through 19, and 202, as these are protected modifier codes; however, you can make a copy of a modifier code and customize it for your needs. You are able to delete a copy of a protected modifier code.
- You cannot change the text that appears in 'Indicator' for the protected modifier codes.
- In Quick Service, you have the option of using the standard Classic or system-generated modifier panels or you can use Panel Editor to create and add modifier code buttons to a Quick Service panel of your own creation.
- You can define up to 99 modifier codes, including the standard set of modifier codes. For COM features using the interface, such as handheld devices, the system continues to synchronize the

default codes, as appropriate, to retain existing functionality. For any new modifier codes, you must configure the COM interface to link to the new modifier codes.

- When you configure modifier codes with the standard Classic modifier screen setup, the FOH Modifier screen shows four modifier codes, and left and right scroll arrows, where appropriate.
- Modifier codes 14 through 19, while visible in both Table Service and Quick Service, are reserved for Quick Service. If you select 'Active' for one of these modifier codes in Table Service, it appears on the hard-coded modifier screen, but does not function and the indicator does not appear.
- When you configure modifier codes for use with the system-generated modifier screen, the modifier screen displays all active modifier codes. If you add a modifier code to a panel, but the code is inactive, an error message appears when you select the modifier code.
- When you use a user-defined modifier panel, the FOH operates as normal. You assign as many modifier codes as you want to a button. If you add an inactive modifier code to a panel, an error message appears when you select the modifier code.
- The FOH and Back-of-House (BOH) PMix reports show the usage of the item per the quantity defined for the code. For example, if you configure the 'Heavy' modifier code with a quantity of '3,' all modifiers applied with the 'Heavy' modifier code assume three times the portion sold.

Modifier Codes tab

Use the Modifier Codes tab to provide basic information, and to designate how the modifier code functions on the FOH.

Group bar: Settings

Description — Provides a description of the modifier code. Type a maximum of 20 characters.

Display name — Specifies the text, up to 20 characters, to appear on the FOH button. Type '\n' between words to display text on separate lines.

Active — Activates the selected modifier code.

Indicator — Specifies the text, up to four characters, to use as a prefix on the kitchen chit and guest check.

Quantity — Specifies the item count, from -999.99 to 999.99, to remove from inventory when you apply the modifier code.

Display graphical modifier image — Associates an image with the modifier code. The image appears on the FOH screen on the next modifier you select after selecting the modifier code. For example, if you associate a double plus sign (++) with the Extra modifier code, when you touch Extra and then touch the Pickles order modifier button, ++ appears on the Pickles order modifier button.



Note

The Aloha POS system supports images on modifier code buttons only when placed on a system-generated panel, the classic modifier screen, or a panel designated as being a 'context' panel.

Kitchen modifier image — Designates the image to print to the left of a modifier code on a kitchen chit, when using a production chit layout in Print Designer. You may want to use a plus sign for a modifier added to an item (Add), a minus sign for a modifier removed from an item (No), and others. You could also use an image with the word ADD or NO. We recommend using 22x22 as the dimensions for your image. **Documented Version:** AK v19.3. **Required Options:** You must import the image using the Aloha Kitchen application type in the Media Files function to make the image available in the drop-down list.

Use graphical modifier color — Stipulates to associate a color with a modifier button when you select an order modifier using this modifier code. **Related Options:** This option enables the 'Custom graphical modifier color' option. **Documented Version:** v12.3.

Custom graphical modifier color — Associates a color with the modifier code. On the FOH screen, the next modifier button you touch after selecting the modifier code changes to the color you select. For example, if you associate blue with the Extra modifier code, when you touch Extra and then touch the Pickles order modifier button, the Pickles order modifier button turns blue. The system supports color on modifier code buttons only when you place them on a system-generated panel, the classic modifier screen, or a panel designated as being a 'context' panel. **Related Options:** You must select 'Use graphical modifier color' to enable this option. **Documented Version:** v12.3.

Used in pizza matrix — Indicates this modifier code is used in the pizza inventory depletion matrix. Once you select this option, an additional column appears on the Pizza Topping Matrix tab in Maintenance > Menu > Items. Clear this option if you are not using the pizza matrix. You cannot use this option when configuring the Pizza Modifier screen. **Required Options:** You must select 'Use graphical modifier color' to enable this option. **Documented Version:** v12.3.

Item highlight — Configures the selected RGB color set to appear as the background color of an item assigned this modifier code. This color overrides the default color defined for the background of the kitchen video screen.

Group bar: Video options

The 'Video options' group bar is not available for some of the protected modifier codes, but does appear for all new modifier codes you create. You must access Maintenance > Business > Additional

Features (Corporate Administration) > Corporate Owner tab and select 'Enable VideoMX' under the 'Options to display' group bar to expose these options and access Maintenance > Business > Store > Store Settings tab > VideoMX group and select 'Enable VideoMX' to use these features.

Video color — Designates the color to use for the modifier code.

Intensify — Indicates the selected modifier code appears in a brighter or more intense color. The normal 16 bit color display is changed to a 255 bit color display.

Reverse — Displays the selected modifier code in reverse. For example, black text appears as white text and a white background appears as a black background.

Blink — Causes the selected modifier code to blink when it appears on the video screen.

Group bar: Pricing

The 'Pricing' group bar is not available for some of the protected modifier codes, but does appear for all new modifier codes you create.

Affects pricing — Designates the modifier code as one that calculates and controls the price of a priced modifier item when you add a priced modifier item to the check using a modifier code. You cannot affect the price of a 'No' modifier code. **Related Options:** This option enables the 'Charge X percent' and 'Charge X percent if included' options. **Documented Version:** v12.3.

Charge X percent — Defines the percentage, from 0 to 9999 with 100% being the default, to use when calculating the price of a modifier not already included as part of the standard item, by first selecting a modifier code; for example, when a guest requests "heavy" mushrooms on a Pepperoni pizza. **Required Options:** You must select 'Affects pricing' to enable this option. 2) You must configure a price for the modifier for this option to affect its pricing. **Documented Version:** v12.3.

Charge X percent if included — Defines the percentage, from 0 to 9999 with 100% being the default, to use when calculating the price of a modifier already included as part of the standard item, by first selecting a modifier code; for example, when a guest requests "extra" pepperoni on a Pepperoni pizza. **Required Options:** 1) You must select 'Affects pricing' to enable this option. 2) You must configure a modifier as an included modifier for this option to operate. 3) You must configure a price for the modifier, for this option to calculate a percentage for the modifier item pricing. **Documented Version:** v12.3.

SCENARIO: 1: MODIFIER CODE ADJUSTMENT INCREASED FOR A NON-INCLUDED MODIFIER

A BLT is priced at \$3.00. Avocado is priced at \$1.00 and is not an included modifier for the BLT. The Heavy modifier code is set to 120% for non-included modifiers. You order the BLT and select Heavy Avocado. The system charges the BLT as $\$3.00 + (\$1.00 \times 120\%) = \$4.20$.

SCENARIO: 2: MODIFIER CODE ADJUSTMENT DECREASED FOR A NON-INCLUDED MODIFIER

A BLT is priced at \$3.00. Avocado is priced at \$1.00 and is not an included modifier for the BLT. The Light modifier code is set to 80% for non-included modifiers. You order the BLT and select Light Avocado. The system charges the BLT as $\$3.00 + (\$1.00 \times 80\%) = \$3.80$.

Modifier Groups

Select **Maintenance > Menu > Modifier Groups** to access this function.

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 defined in the Items file, grouped into a modifier group, and then assigned to an item. Modifiers convey information to the kitchen when printers and remote display systems are in use. For example, lettuce, onions, and pickles are Items, collected into a modifier group called *Extras*, then assigned to the Hamburger item. If necessary, you can assign a price to a modifier item. For example, you can assign a price to bacon (when used as a modifier), so that when a customer orders a hamburger with bacon, the price of the bacon posts to the guest check.

You can also use modifiers to alter other modifier items. For example, you might have a salad as a modifier choice for a steak dinner item. That salad might also have a set of modifier choices, such as *Salad Toppings*, that includes the dressings and other toppings commonly added to a salad.

When you add a Hamburger item to a submenu, and an employee selects it on an order entry terminal, the employee can select a modifier from the *Extras* modifier group.

Using the features available in the Modifier Groups function, you control whether the modifier group appears automatically when you select the item to which it is assigned, or whether you must select the Modify button for the modifier group to appear. You also control other attributes, such as the minimum and maximum number of modifiers you can select and the number of modifiers that are allowed at no charge. This linked method of building menus permits unlimited configuration options in the menu system.



Tip

Modifiers force employees to navigate through extra screens; which can sometimes slow down the checkout process. For example, in a cafeteria environment, you do not need to modify an item with extra tomatoes unless there is a charge for extra tomatoes.

Examples of how you might use a modifier group to extend, alter, or further define a menu item:

Create Sides modifier groups and include the items from which a customer must choose to complete an entrée or combo, such as salad, baked potato, vegetables, french fries. You typically force the guest to choose a 'Minimum' of 1, and a 'Maximum' of 1.

Create Ingredients modifier groups and include the items a guest can add or omit on request, such as onions on a hamburger, or sour cream on nachos. You rarely force the guest to choose something unless you state and encourage it on your menu.

Create Prep modifier groups and include the ways in which you prepare or cook an item. For example, a steak temperature. You always force the guest to choose a 'Minimum' of 1, and a 'Maximum' of 1.

Create Quantity or Size modifier groups and include the sizes, portions, or amounts in which a guest can order an item. For example, a small or large bowl of soup. You always force the guest to choose a 'Minimum' of 1, and a 'Maximum' of 1.

Create Build modifier groups from which you can switch out all modifier items that come standard with a menu item with another grouping of modifier items, with one button touch. For example, a sandwich concept offers a chicken sandwich with a build modifier group that includes flat bread, lettuce, red onions, and an oil and vinegar sauce. The guest would like to swap out the build modifier group with another group that includes sourdough bread with lettuce, tomato, red onions, and mayonnaise. You would not force the guest to choose a modifier because the item comes with a standard build modifier group.



Tip

After you create a modifier group, remember to select and add the modifier group to the item to modify in Maintenance > Menu > Items > Modifier tab.

Modifier Groups types

Standard represents a grouping of standard items from which a guest can choose to modify a menu item.

Build represents a grouping of the item types you designate as build items, from which a guest can choose to modify a menu item.

Modifier Group quick tips:

There are several rules or tips to follow when you add a new modifier group:

- To include an item in a modifier group, you must first add the item to the items database. Then, you can quickly and easily add the item to a modifier group. Modifier group record numbers begin at 10,000 and end at 19,999.
- You price modifiers, as necessary. Keep in mind, the price of a modifier is not sensitive to the *No* or *Extra* modifier buttons. In other words, if you order no bacon using the *No* and *Bacon* modifiers, the price of the bacon (if you assigned a price) does not change accordingly.
- The 'Screen Flow Required' option forces the modifier screen to appear each time a guest orders an applicable item.
- Modifier groups can modify other modifier groups. For example, a *salads* modifier group can modify a dinner entrée item and a *salad toppings* modifier group can modify a salad.
- You must associate modifier groups to their applicable items, in Maintenance > Menu > Items; otherwise, the modifier group does not appear on the Aloha POS terminal when an employee selects an item.

Modifier tab

Use the Modifier tab to identify the modifier group, and set options that change the modifier screen, or determine employees who can use the selected modifier group.

Group bar: Settings

Short name — Identifies the abbreviated name for the modifier group. The short name appears on the FOH order entry screen. Text is centered on the button; therefore, the length of the short name is a consideration. Type a maximum of 15 characters, but if you type more than 11 characters, the short name might appear cropped on screen. To control the appearance on screen, type `\n` at the desired line break in 'Short name' to configure the short name to appear as two lines on a button. For example, type 'Hot\nTamale' to have Hot appear on the top line and Tamale appear on the second line of a button. Keep in mind, `\n` takes up two of the allotted 15 characters.

Long name — Identifies the formal, more descriptive name of the item. The long name appears in reports and reporting features built into the system.

Minimum — Specifies the minimum number of modifiers that you can select when a customer orders an item. The value can be 0 (zero). A number more than zero forces the modifier selection screen to appear, regardless of whether you select 'Screen flow required.' This forces you to select at least the minimum number of items from the modifier group. If you do not set a minimum number, then you need not set a maximum.

Maximum — Specifies the maximum number of modifiers that you can select when a customer orders an item. If both 'Minimum' and 'Maximum' are 0 (zero), the Aloha POS system assumes an unlimited number; otherwise, this option must be equal to or greater than the value shown for 'Minimum.'

Free — Specifies the number of items from the modifier group the customer can order at no charge. For example, if the value for 'Free' is set to 1, then the Aloha POS system does not charge for the lower-priced item.

Substitute group — Indicates a previously defined modifier group that contains items you can substitute for the items listed in the current modifier group. Selecting a substitute group is not required, but if selected, the system places a 'Substitute' button on order entry terminals.

Deferred modifier — Adds placeholders on the guest check screen for any required modifier to allow an employee to continue working with the order without interrupting the guest. The employee can address the deferred modifier once the guest gives the rest of their order. This only applies to first-level modifiers. When cleared, you must address each required modifier before you can enter the next menu item. **Related Options: 1)** This option disables the 'Screen flow required' option. **2)** Select 'Exempt queue from flow' and use an exempted order entry queue to disable this option. **3)** This feature works best with system-generated modifier screens. To do this, you must configure a template panel in Screen Designer and select that panel from in 'Modifier Panel' on the same tab.

Screen flow required — Forces the order entry terminal to automatically open the Modifier Group screen. Typically, the value in 'Minimum' is greater than 0 (zero), forcing you to select at least one modifier from the group. **Required Options:** You must clear 'Deferred modifier' to enable this option.

Modifier toggle configuration — Enables you to toggle between adding or removing modifiers within this modifier group to or from an item on the guest check, as well as change the modifier code applied to a modifier, with one button touch. **Required Options:** 1) You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display Context Panels' under the 'Options to display' group bar to expose this option. 2) You must add the modifier buttons to a panel designated as a Context Panel instead of adding them to the classic Modifier panel. **Related Options:** This option exposes 'Automatically replaces included modifiers.'

Exempt queue from flow — Prevents this modifier group from appearing during order entry, even when you select 'Screen flow required' or 'Minimum 1,' for each order entry queue for which, you select 'Exempt from modifier flow. **Required Options:** You must access Maintenance > System Settings > Order Entry Queue and select 'Exempt from modifier flow' under the 'Settings' group bar to suppress automatically showing any modifier group with 'Screen flow required' selected.

Suppress classic modifier screen — Prevents the system from showing the hard-coded classic modifier screen when the modifier group has one or more minimum required modifiers, as defined in 'Minimum.' **Required options:** You must clear 'Screen flow required' to enable this option.

Use modifier panel — Forces the order entry terminal screens to automatically open a modifier group screen on the FOH terminal. The screen is generated by the system to display the modifiers created. 'Use modifier panel' requires an order taker to enter the modifiers and select either OK or Cancel on the modifier panel. **Required Options:** You must select 'Screen flow required' to enable this option. **Related Options:** Selecting this option disables 'Deferred modifier.'

Show keypad on panel — Displays a numeric keypad on the modifier panel. The numeric keypad enables you to enter multiple entries of the same modifier. **Required Options:** You must select 'Use modifier panel' to enable this option.

Modifier panel — Enables you to select the modifiers to add to the modifier group. You create a panel in Screen Designer for the modifiers. Typically, a you create a blank panel in Screen Designer and select the modifiers to display. This method enables you to use the panel for multiple modifier groups. **Required Options:** You must select 'Use modifier panel' to enable this option.

Automatically replaces included modifiers — Allows you to substitute all included modifiers with a non-included modifier, with one touch. Each modifier must reside in the same modifier group attached to the item. Replacing an included modifier works when you select the non-included modifier without a preceding modifier code, as the system will insert a 'NO' modifier code for each included modifier. **Required Options: 1)** You must select 'Modifier toggle configuration' to enable this option. **2)** You must configure context panels and modifiers, both included and non-included, to use this feature. **Documented Version:** v12.3.

Group bar: Catalog

Available for online — Indicates the modifier group to export to the BSP catalog service.

Required Options: 1) Items in the modifier group do not appear online unless you also publish the individual modifier item. 2) You must select 'Export to Platform - Catalog' in Maintenance > Business > Store to expose this option.

Online name — Specifies the online name for this modifier group. **Required Options:** You must select 'Export to Platform - Catalog' in Maintenance > Business > Store to expose this option.

Layout tab

The Layout tab contains the button positions used to add items to the modifier group. Modifier items display on order entry terminals in the order in which they appear on the Layout tab; therefore, you should consider the order in which servers typically select modifiers.

You can select up to 54 modifiers for a specific modifier group. The item name that appears on each modifier button is the 'Short name,' which you specify when you add an item in Maintenance > Menu > Items; however, if you assign a bitmap (BMP) image to an item, the bitmap image appears instead of the 'Short name.' Additionally, the corresponding item number appears in the lower left corner of each modifier button, and the lower right corner shows the 'Price' you assign to the modifier item, if applicable.

Arrow buttons appear at the bottom of the Layout tab to navigate to additional modifier buttons.

The following buttons and options also appear on the Layout tab:

Sort ^ Button — Sorts the buttons vertically in alphabetical order.

Sort > Button — Sorts the buttons horizontally in alphabetical order.

Consolidate Button — Eliminates any blank buttons that might fall between assigned buttons.

Item — Designates the item to add to the modifier group. To remove a modifier button assignment, click the button containing the item to remove, and then select None from 'Item.'

Weight — Determines the selection count of the modifier item. For example, Mike's restaurant offers entrées with a choice of two sides, and each side item has a default weight of '1.' Customers can substitute a salad in place of two side items. In this situation, the salad carries a default weight of '2,' so that when you order the item from the 'Side Items' modifier menu, the system counts the salad as the equivalent of two sides. Valid entries range from 1 to 30.

Not eligible for substitution — Specifies this modifier cannot be substituted for an included modifier you configured as substitutable in Maintenance > Menu > Items > Dynamic Modifiers tab under the 'Dynamic Modifiers' group bar.

Price method — Indicates the specific method to use for determining the price of the modifier item. Available price methods are 'Item price,' 'Button price,' or 'Price level.' The default price method is 'Item price.'

Default price — Stipulates to use the price of the item, as entered in Item Maintenance, to price the modifier item. **Required Options:** You must select a price method of 'Item price' to enable this option.

Button price — Stipulates to use the button price to price the item. Type the price of the modifier next to 'Button price.' **Required Options:** You must select a price method of 'Button price' to enable this option.

Price level — Identifies the specific price level to use when pricing the item. **Required Options:** You must select a price method of 'Price level' to enable this option. **Related Requirements:** You define pricing levels in Maintenance > Pricing > Price Level.

Movie

Select **Maintenance > Messaging > Movie** to access this function.

Use the Movie function to configure playing a movie (video) for specific employees, or all employees, upon clock-in. Using this tool to train and motivate your employees can greatly reduce your training costs.

With this feature, you can:

- Assign a movie to play for a specific job code.
- Assign a movie to play for a specific employee.
- Define a range of dates for which the movie is to play.
- Restrict the time of day the movie plays, so the movie does not play for employees that clock in during busy hours.
- Define the number of times a movie plays during a range of dates.



Reference

Refer to the [Clock-In Movie Feature Focus Guide - HKS344](#) for more information on configuring a movie to play at clock-in.

Movie tab

The Movie tab enables you to define basic information about the movie, including which movie to play, start and end dates, and more.

Group bar: Settings

Name — Identifies the movie. Type a maximum of 40 characters.

Movie — Specifies the movie to play. The Aloha POS system currently supports movies with a .wmv or .swf file extension. **Required Options:** You must access Maintenance > Business > Store > Store Settings tab > User Interface group and select 'Enable multimedia' under the 'Display' group bar to allow a movie to play on the FOH terminal. **Related Requirements:** You must access Maintenance > System Settings > Media files and upload a movie before you can select it from the movie list.



Reference

The Clock-In Movie feature uses the Activate Movie event type to specify the movie to play at clock-in. Refer to [Events Schedule](#) for more information.

Group bar: Plays settings

Start date — Indicates the date of business, in *mm/dd/yyyy* format, for the movie to begin playing.

End date — Indicates the date of business, in *mm/dd/yyyy* format, for the movie to stop playing.

Number of plays — Indicates the number of times you want the movie to play within the specified date range. The Aloha POS system keeps track of the number of times the movie plays, and for whom, in MovieHst.dbf.

Maximum play time in minutes — Specifies the number of minutes the movie plays, up to a maximum of 999 minutes. We recommend you set this value to 0 for all media files except flash files. For flash media files, type the actual playing length of the movie. If you type 0, then the flash media file will not close on the Front-of-House (FOH). If you type a value shorter than the length of the movie, the flash media file closes before the movie finishes.

Employees tab

The Employees tab enables you to designate specific employees to view the movie at clock-in. The Aloha POS system keeps track of the employees for which the movie plays in MovieHst.dbf.

The Available list, on the left side of the screen, shows the employees that currently exist in the database. The Included list, on the right side of the screen, shows the employees currently assigned to view the movie. You can select up to five employees. Use the >> and << arrows to move an employee between the 'Available' list and the 'Included' list.

Jobcode tab

The Jobcode tab enables you to designate specific job codes to view the movie at clock-in. When you select a job code, the movie plays for any employee who clocks in under that job code.

The Available list, on the left side of the screen, shows the job codes that currently exist in the database. The Included list, on the right side of the screen, shows the job codes currently assigned to view the movie. You can select up to five job codes. Use the >> and << arrows to move a job code between the 'Available' list and the 'Included' list.

No Sale Reasons

Select **Maintenance > System Settings > No Sale Reasons** to access this function.

The No Sale Reasons function enables you to define the reasons why you can open a cash drawer without an accompanying sale. This function is not limited to open cash drawers only; you can use a no-sale reason message for other actions that can potentially impact the interpretation of the daily sales and business reports, so that an explanation of such actions appears in the daily reports. You can create up to 20 reasons.

Access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'No sale' under the 'Financial' group bar to enable the Open Drawer button to appear on the Front-of-House (FOH) terminal for each employee assigned this access; otherwise, the button does not appear. When an employee selects this button without first entering a sale, a prompt appears directing the employee to select a reason. To disable the prompt for a no-sale reason, you must *not* define no-sale reasons.

Use the No Sale Reason tab to define or change no-sale reasons. When you open a cash drawer or another action takes place that can potentially impact the interpretation of the daily sales and business reports, that action accompanied by a No Sale Reason message can appear in the daily reports.

No Sale Reason tab

Use the No Sale Reason tab to define the reasons why you can open a cash drawer without an accompanying sale.

Group bar: Identification

Description — Identifies the no sale reason. The name should be descriptive for ease of reference. Type a maximum of 15 characters.

Occasions, Occasion Categories, PAR Templates, and Kitchen Routing Levels

The Occasions functionality is complex and requires configuration in Maintenance > System Settings > Occasions, Occasion Categories, PAR Templates, and Kitchen Routing Levels. Contact your account executive for assistance and DO NOT activate this feature without first consulting with them.

Order Entry Queue

Select **Maintenance > System Settings > Order Entry Queue** to access this function.

Order entry queues allow you to organize and route incoming orders to reflect the check numbering system and ordering methods of your store. Typically, order entry queues section off terminals, such as Drive Thru, Counter, Bar, and more. You can establish the default order mode for the queue, designate an image to act as a visual indicator of the order mode, set the number of orders that can remain open, and assign numbers to the orders. You also control automatic processes, such as credit card order closure, printing, and new order opening, with the Order Entry Queue function.

Order Entry Queue tab

Use the Order Entry Queue tab to configure how incoming orders route during the order entry process.

Group bar: Settings

Name — Identifies the queue. We recommend using a descriptive name, such as Drive Thru, Counter, and Bar. Type a maximum of 30 characters.

Default order mode — Establishes the order mode that appears for the queue. **Related Requirements:** You define order modes in Maintenance > System Settings > Order Mode.

Image — Designates the image to appear in the order entry queue as a visual indicator of the order mode applied to the order. **Related Requirements:** You must use the Media Files function to import an image before you can select the image from the image list.

Auto close — Automatically closes credit card orders after receiving approval.

Auto print — Automatically prints the guest check when the order closes.

Auto open new order — Automatically starts a new order when the previous order closes.

Exempt from modifier flow — Specifies that modifier groups for which you select 'Exempt queue from flow' do not appear during order entry for the selected order entry queue. This allows you to override 'Screen flow required' and 'Minimum' in the Modifier Groups function, which always shows the modifier group when you add an applicable item to the order. **Required Options:** To qualify which modifier groups are exempt from the forced modifier flow, access Maintenance > Menus > Modifier Groups > Modifier tab and select 'Exempt queue from flow' under the 'Settings' group bar.

Maximum number of open orders — Defines the maximum number of orders that can remain open simultaneously in the order queue. Valid entries range from 0 to 255

Minimum order number — Sets the lowest number the system can assign to the order.

Maximum order number — Sets the highest number the system can assign to the order.

Order number prefix text — Sets a prefix that appears in front of the order number. Type a maximum of 10 characters.

Redirect tender actions to review check — Directs tender functions from this order entry queue to the check appearing in the review order window. If cleared, tender functions apply to the check appearing in the guest check window, as normal. **Documented Version:** v12.3.

Review check panel — Specifies on which review check panel to apply all tender functions.

Related Requirements: To display a review check panel for selection, access Screen Designer and create a review check panel named 'The first open and sent check' and assign it to the base position.

Required Options: You must select 'Redirect tender actions to review order' to enable this option.

Print individual seat checks — Prints a seat check, for each order sent to this order entry queue, to ensure you place the proper items on a tray for each individual guest included in the total order. Each seat check prints at the local terminal default printer as soon as the order taker creates another seat by pressing Next Seat on the order entry terminal. Updated seat checks print if a customer changes an order before the total check is closed. No seat check prints when the order includes only one seat (guest). **Documented Version:** v12.3.

Group bar: Speed of service

Speed of service — Determines the method to use when recording speed of service metrics for this order entry queue. 'None' is a valid entry. **Documented Version:** v12.3.

None — Excludes this order entry queue from contributing to the recording of metrics for the Speed of Service report.

Use check close time — Allows recording metrics for the Speed of Service report to end when you close the check.

Use served order time — Allows recording metrics for the Speed of Service report to end when you select 'Served' on the FOH.

Use last bump time — Allows the recording of metrics for the Speed of Service report to end when you bump the last item from a video screen.

Use longest of last bump/served time — Tracks both the last bump and serve time transaction end points simultaneously and records the longer of the two for speed of service metrics. This more accurately captures the entire process of cooking and presenting the food to the guest in the case where a cashier may touch the 'served order' button before the kitchen staff even bumps the order. **Documented Version:** v14.1.

Number of seconds for yellow indicator — Designates the number of seconds after starting an order for the yellow indicator to appear on the terminal letting you know you are quickly approaching a critical threshold for speed of service metrics. **Documented Version:** v12.3.

Number of seconds for red indicator — Designates the number of seconds after starting an order for the red indicator to appear on the terminal letting you know you are quickly approaching a critical threshold for speed of service metrics. **Documented Version:** v12.3.

Order Mode

Select **Maintenance > System Settings > Order Mode** to access this function.

Order modes direct the behavior of menu items when you add an order in the Aloha POS system. Use the Order Modes function to define the different ways in which customers receive orders within the restaurant. Typical order modes include Dine In, To Go, Appetizers, and Express. You can define up to 999 order modes.

In Quick Service, order modes appear as buttons that you select on the order entry screen each time you take an order from a customer.



Tip

After you define order modes, you must manually create the order mode buttons and place them on the appropriate panels in Screen Designer; however, you can assign advanced features to the order modes in the Order Modes function.

Order Mode tab

Use the Order Mode tab to configure how the order mode functions during the order entry process.

Group bar: Settings

Name — Identifies the order mode. Type a maximum of 12 characters.

Indicator — Designates special characters or character combinations that mark items as ordered (sent to the kitchen) when ordered at order entry terminals. These special characters, such as '->,' help make clear the order mode under which you order an item. Type a maximum of three characters.

Image — Designates the image to appear in the order entry queue as a visual indicator of the order mode. For example, an image of a car is a visual indicator of the drive-thru order mode. **Related Options:** Any image you select in the User Interface group under the 'Display > Graphics On External Orders' group bar on the Store Settings tab in Maintenance > Business > Store supersedes the image you select here. **Documented Version:** v19.3.

On-screen check background — Designates the image to appear as the background of an on-screen guest check as a visual indicator of the order mode. **Documented Version:** v19.3.

Kitchen chit header — Specifies a character string to print on the chit at the beginning of the items sent in that order mode. This string can be simple, such as 'To Go,' or descriptive, such as 'The Following Items To Go' for a to go order mode.

Kitchen chit footer — Specifies a character string to print on the chit at the end of the items sent in that order mode. This string can be simple, such as 'To Go,' or descriptive, such as 'The Above Items To Go' for a to go order mode.

Route orders to printer group — Sets the routing for any items you order using the order mode. The selection on the Order Mode function tab overrides all other printer routing in the Aloha menu system. This selection must be active only in those cases where the defined order mode requires specific routing, such as a special printer for to go orders. If no special routing requirements exist for the order mode, select 'None.'

Revenue center — Allows the assignment of a specific order mode to a revenue center for income reporting purposes. If no special need exists for reporting income by revenue center for the order mode, select 'None.'

Active — Sets the order mode to active. **Related Options:** You can also activate an order mode with the 'Activate order mode' event in Maintenance > System Settings > Event Schedule.

Apply to all unordered items — Sends all unordered items on the guest check to the kitchen when you touch the order mode button; otherwise, you must select the items on the check and touch the order mode button. **Related Options:** Select 'Apply to ordered items' to include ordered items.

Apply to ordered items — Sends all unordered and ordered items on the guest check to the kitchen when you touch the order mode button. **Required Options:** You must select 'Apply to all unordered items' to enable this option.

Sales are included in tippable sales calculation — Includes sales from this order mode in tippable sales amounts. Do not select this option for order modes that are not subject to tipping.

Include sales in POS interval report — Includes sales from this order mode in the appropriate interval of the Interval report. Use this option for cafeteria environments using Table Service. **Related Options:** To define the Interval report to print, clear 'No interval report' in Store Settings.

Require manager approval for Cash tender type over threshold — Specifies the amount a cash tender must exceed, when applying a cash payment to a guest check, for the Aloha POS system to require manager approval. **Required Options:** Access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Approve cash drops' under the 'Financial' group bar to enable an employee, such as a manager, to approve a tender that exceeds the threshold and perform a cash drop. **Documented Version:** v12.3.

Do not send items — Disables automatically sending items to the kitchen when you tender and close the check or select another order mode. If you select this option, you must provide another method for sending items to the kitchen, such as selecting a different order mode that is configured to send items to the kitchen. **Documented Version:** v12.3.

Display on kiosk — Allows guests placing an order from a kiosk to select this order mode. **Required Options:** You must select 'Uses kiosk' under the 'Products installed' group bar in Maintenance > Business > Installed Products to expose this option.

Group bar: Tax selections

Override primary Tax Type 1 — Supersedes the existing tax type amount and allows the system to tax at a different amount when an alternate order mode is used. For example, guests are taxed using different tax amounts when placing orders to-go, versus dining in.

Category 1 — Associates the item category to the primary tax type 1 to override when using an alternate order mode.

Override primary Tax Type 2 — Supersedes the existing tax type amount and allows the system to tax at a different amount when an alternate order mode is used. For example, guests are taxed using different tax amounts when placing orders to-go, versus dining in.

Category 2 — Associates the item category to the primary tax type 2 to override when using an alternate order mode.

Non-taxable except — Used to treat the selected order mode as nontaxable, except in the case where a guest makes a purchase from the category selected in 'Category.' **Related Options:** Selecting this option enables the 'Category' option.

Category — Specifies the category of items you want to tax within the selected nontaxable order mode. **Required Options:** You must select 'Non-taxable except' to enable this option.

Override occupational Tax Type — Enables you to override an occupational tax based on the order mode you apply to the guest check. **Documented Version:** v19.3. **Related Options:** Selecting this option enables 'Occupational Tax Type Category.'

Occupational Tax Type Category — Enables you to select a category for which to override the occupational tax for items ordered from a specific category when you apply the order mode. (Optional) **Documented Version:** v19.3. **Required Options:** You must select 'Override occupational Tax Type' to expose this option.

Group bar: Service charge

Use the 'Service charge' group bar to define requirements for using service charges.

Apply service charge — Enables you to add a surcharge to the guest check for all orders from this order mode. **Related Options:** Enables the service charge options. For example, you can use the service charge options to add a delivery fee to all orders from the 'To Go' order mode.

Charge line text — Specifies the text to appear next to the service charge amount on the guest check. For example, type 'Delivery Fee' for the service charge being added to 'To Go' orders. **Required Options:** You must select 'Apply service charge' to enable this option.

Primary tax applied to service charge — Designates the primary tax type to apply to the service charge. **Required Options:** You must select 'Apply service charge' to enable this option.

Secondary tax applied to service charge — Designates the secondary tax type to apply to the service charge. **Required Options:** You must select 'Apply service charge' to enable this option.

Service charge method — Indicates the method the system uses to calculate the service charge. **Required Options:** You must select 'Apply service charge' to enable this option.

Percent — Designates the service charge is treated as a percentage rate. If selected, the Aloha POS system uses the percentage rate you specify to calculate a percentage of the guest check total. The amount is then added to the guest check when you apply this order mode. Currently, the Aloha POS system does not support fractional percentages and you must enter the percentage as a whole integer only. For example, if there is a 10 percent up-charge for 'To Go' items, select 'Percentage,' then type 10 in the adjacent text box.

Fixed — Designates the service charge is a fixed monetary value. If selected, the Aloha POS system adds the amount you specify to the guest check when you apply this order mode. For example, in the To Go order mode, selecting 'Fixed,' and then typing 2.00, applies a \$2.00 service charge for the 'To Go' order mode.

Percent — Designates the percentage to use when calculating the service charge for the order mode. Currently, the Aloha POS system does not support fractional percentages and you must enter the percentage as a whole integer only. For example, to charge a 10 percent service charge for 'To Go' orders, type 10. **Required Options:** You must select 'Apply service charge' and a 'Service charge method' of Percent to enable this option. **Related Options:** To override a percentage calculation that is too low for small orders or too high for large orders, establish thresholds in 'Minimum service charge amount,' and 'Maximum service charge amount.'

Minimum service charge amount — Indicates the minimum dollar amount to charge for a service charge, such as a delivery fee, when you select Percent in 'Service charge method.' If the percent calculation is less than the minimum dollar amount specified here, the system overrides the percent calculation and adds the dollar amount specified here to the guest check instead. **Required Options:** You must select 'Apply service charge' and a 'Service charge method' of Percent to enable this option. **Documented Version:** v12.3.

Maximum service charge amount — Indicates the maximum dollar amount to charge for a service charge, such as a delivery fee, when you choose Percent as the 'Service charge method.' If the percent calculation is greater than the maximum dollar amount specified here, the system overrides the percent calculation and adds the dollar amount specified here to the guest check instead. **Required Options:** You must select 'Apply service charge' and a 'Service charge method' of Percent to enable this option. **Documented Version:** v12.3.

Amount — Specifies a flat rate to add to the check when using the fixed rate method for the service charge. **Required Options:** You must select 'Apply service charge' and a 'Service charge method' of Fixed to enable this option.

Round to 0.05 — Rounds the order mode charge, if any, to the nearest five one hundredths. For example, if the calculation for the 'To Go' delivery fee is \$1.98, the system rounds the service charge to \$2.00. **Required Options:** You must select 'Apply service charge' to enable this option.

Group bar: Eligible Items

Category of eligible items — Designates the category of items for which you want to either explicitly apply or NOT apply this order mode, based on your selection in 'Eligibility methods (include).' Selecting None means there is no category restriction and you can apply this order mode to items from all categories. **Related Options:** Selecting a category other than None enables 'Eligibility methods (include).'

Eligibility methods (include) — Designates you must apply this order mode to only items in the selected category in 'Category of eligible items.' When cleared, you cannot apply this order mode to any item in the selected category. **Required Options:** You must select 'Category of eligible items' to enable this option.

Group bar: Printing

Print barcode on Expediter — Prints the bar code number on the expeditor chit.

Exclude additional charges — Stipulates to not include additional charges when you order items using this order mode. The following scenarios illustrate this functionality:

- If you ring up *all* items on the guest check under an order mode that excludes the additional charge, the Aloha POS system does not apply the charge to the guest check.
- If you ring up items on the guest check under two or more order modes and one allows an additional percentage charge, the percentage applies only to the order mode items that allows the additional charge.
- If you ring up items on the guest check under two or more order modes and you configured one order mode with a flat fee additional charge, the Aloha POS system applies the flat fee to the guest check regardless of the combined amount from multiple order modes.

Delivery tab

Use the Delivery tab to establish the information that prints on a delivery ticket. It also provides the ability to set up different programs to reward and encourage guests to buy more frequently with the use of coupons and bonus plans.

Group bar: Print additional information on delivery ticket

Customer name — Prints the name of the guest from the delivery database.

Phone number — Prints the phone number of the guest from the delivery database.

Short address — Prints an abbreviated address of the guest from the delivery database.

Long address — Prints the full address of the guest from the delivery database.

Directions — Prints additional address information from the delivery database.

User Field 1 — Prints the text in the 'User 1' option from the delivery database.

User Field 2 — Prints the text in the 'User 2' option from the delivery database.

Print delivery check and chit — Specifies the position on the check where the delivery information prints.

Voucher Printers tab

Use the Voucher Printers tab to specify the voucher printer on which the order prints when you select this order mode. Use the >> and << arrows to move printers between the 'Available' list and the 'Included' list.

Expediter Printers tab

Use the Expediter Printers tab to specify the expediter printer on which the order prints when you select this order mode. Use the >> and << arrows to move printers between the 'Available' list and the 'Included' list.

Kitchen tab

Use the Kitchen tab to configure additional options for the order mode when interfacing with Aloha Kitchen. **Required Options:** You must select 'Uses Kitchen' in Maintenance > Business > Installed Products to enable this tab.

Kitchen icon — Defines an image to appear on the video cell when using this order mode. Select a stock image or select 'Custom' from the drop-down list. **Required Options:** If you select 'Custom,' designate the custom image to use in 'Custom kitchen icon.'

Custom kitchen icon — Defines an image other than a stock image to appear on the video cell in Aloha Kitchen. **Required Options:** You must select 'Kitchen icon' to enable this option.

Order mode routing method — Overrides the method established in Kitchen Settings to determine when items appear on the kitchen screen once employees enter the order in the POS. Select from the following:

Default — Maintains the routing method established in Kitchen Settings. This is the default selection.

Immediate — Enables each item to appear on the kitchen screen as entered on the POS. This option overrides the method established in Kitchen Settings.

One behind — Enables each item to appear on the kitchen screen when you enter the next item in the order. If the item is the last in the order, it appears when you apply an order mode to the order. This option overrides the method established in Kitchen Settings.

Route when POS order is closed — Enables each order to appear on the kitchen screen when you close the order on the POS. This option overrides the method established in Kitchen Settings.

When finalized — Enables each order to appear on the kitchen screen when you apply this order mode to an order. This option overrides the method established in Kitchen Settings.

Parse order name for phone number — Separates the phone number from the order mode for display purposes.

Parse order name for pager number — Separates the pager number from the order mode for display purposes.

Parse order name for tent number — Bypasses internal naming conventions of a check, such as 'table #' and 'check #,' and allows the system to use a tent number in place of the order name.

Parse order name for customer name — Bypasses internal naming conventions of a check, such as 'table #' and 'check #,' and allows the system to use Print Designer to print the consumer name on a production chit. **Related Requirements:** You must add either the 'Customer first name' or 'Customer last name first initial' element to a production chit in Print Designer to use this option.

Use phone number for SMS paging — Enables you to use a phone number associated with the check to send an SMS page. You either enter the phone number as the guest name or the number is sent from Aloha Takeout. **Related Options:** This option enables the 'SMS paging text message' and 'Page timeout (in seconds)' options.



Reference

Refer to the [HME Wireless Text Paging Feature Focus Guide - HME367](#) for information on sending text pages.

SMS paging text message — Specifies the text message to send to a guest notifying them when their order is ready. The default message is 'Order {0} is ready for pick up.' The number in brackets

determines whether the system includes the order number or the order name in the message text. Type {0} to use the order number, or type {1} to use the order name. You can also change the surrounding message around the variable to customize the message text. **Documented Version:** AK v16.1. **Required Options:** You must select 'Use phone number for SMS paging' to enable this option.

Page timeout (in seconds) — Specifies the number of seconds, from zero to 600, between which Aloha Kitchen sends a text message. We recommend setting this between six and 10 seconds. Anything less, the text message may not get sent to the guest when you bump an order back to back from the kitchen screen. The higher the number, the longer the delay between sending text messages. **Documented Version:** AK v17.1. **Required Options:** You must select 'Use phone number for SMS paging' to enable this option.

Is guest present — Displays an icon on the video cell when a guest arrives at the restaurant. **Required Options:** You must interface with Aloha Takeout to use this feature.

Show with item — Displays the order mode name with each item on the video cell.

Kitchen text — Specifies any text to precede an order on the video cell.

Print layout override — Specifies the production chit layout designed in Print Designer to use for printing the chit when you apply this order mode. **Documented Version:** AK v19.3. **Related Options:** The 'Print layout override' option overrides the layout defined in Maintenance > Kitchen Configuration > Kitchen Settings.

Pay Adjustments (formerly Other Wages)

Select **Maintenance > Labor > Pay Adjustments** to access this function.

Use the Pay Adjustments function to manually enter and edit paid time off (PTO) in the form of sick, holiday, or vacation time for your employees. Calculate the PTO pay in hours, dollar amounts, or both. In addition, you set parameters related to meal and rest period breaks, split shift premiums, and other system-generated adjustments. You can add Pay Adjustments from either the Front-of-House (FOH) terminal or the Back-of-House (BOH) terminal, if you have appropriate access.

The Pay Adjustments function uses wage types you define; however, the Aloha POS system has some predefined pay adjustment types that you cannot edit. In addition to sick pay, holiday, and vacation pay, here are some examples of PTO pay adjustment types: **Pay Adjustment tab**

Name	Description
Bonus	Pay for bonus number of hours or a flat dollar amount.
Bereavement	Pay for funeral leave.
Jury Duty	Pay for jury service.
Training	Pay for time spent while employee is in training.
Cash Tips	Dollar amount or hours employee receives for tips.
Adjustments	Pay adjustment to correct a previous error, deduct an authorized deduction, or any other adjustment needed.

The Pay Adjustment tab enables you to add basic information, including number, description, and calculation method for a pay adjustment type. You can create up to 100 different pay adjustment types.

Group bar: Identification

Description — Specifies a descriptive name that appears on screen. Type a maximum of 45 characters.

Short Name — Specifies an abbreviation for the descriptive name to appear on reports. Type a maximum of 45 characters.

Calculate “paid time off” based on — Indicates how the Aloha POS system calculates amounts for the pay adjustment.

Hours — Enables you to configure a pay adjustment type that calculates by number of hours.

Amount — Enables you to configure a pay adjustment type that calculates by dollar amount.

Both — Enables you to configure a pay adjustment type that calculates by both hours and dollar amount. (This option not supported by NCR Back Office Labor.)

Export ID: Numeric — Designates a unique numeric code for each pay adjustment type to enable exporting to third-party software.

Export ID: Alphanumeric — Designates a unique alphanumeric code for each pay adjustment type to enable exporting to third-party software.

Payment Device: Payment Devices

Select **Maintenance > Hardware > Payment Device > Payment Devices** to access this function.

Use the Payment Devices function to define the wireless payment devices for the Elavon pay-at-table payment solution.

Group bar: Settings

Name — Identifies the wireless PIN pad device. Be specific, as you can have multiple PIN pad devices for one area. For example, you use three PIN pad devices in the bar. Name each PIN pad device using the locale and a number, such as 'Bar 1,' 'Bar 2,' and so on. **Documented Version:** v14.1.

Model — Designates the type of wireless PIN pad device used for the pay-at-the-table solution. We currently only support the Verifone VX 680 payment device for this solution. **Documented Version:** v14.1.

Serial number — Designates the unique code assigned to a single wireless PIN pad device, such as the nine-digit number located on the back of the VeriFone VX 680 device. The serial number must correspond to the terminal ID number. **Documented Version:** v14.1.

Group bar: Connection Settings

IP address — Designates the unique string of numbers, separated by periods, that identifies each PIN pad device participating in a computer network that uses Internet Protocol for communication. The address should follow the same IP range as the Aloha POS terminals. For example, if the file server has the IP address 100.100.100.101 and the master terminal has the IP address 100.100.100.102, then the first device should use the IP address 100.100.100.103 and the next device should use the IP address 100.100.100.104, and so on. **Documented Version:** v14.1.

Port number — Designates the number, from 0 to 65535, to associate with the IP address for this device. **Documented Version:** v14.1.

Processor Terminal ID — Designates the unique identifier assigned to the wireless PIN pad device, which identifies the location from which a payment card transaction originates. Obtain this number from the processor. The terminal ID number serial number must correspond to the serial number. Note: After you activate the Verifone device, the Processor Terminal ID appears on its screen. **Documented Version:** v14.1.

Payment Device: Payment Device Settings

Select **Maintenance > Hardware > Payment Device > Payment Device Settings** to access this function.

Use this function to define global settings for all wireless payment devices defined in Maintenance > Hardware > Payment Device > Payment Devices, such as the timeout thresholds in which the payment device either confirms, approves, or cancels a transaction.

Group bar: Identification

The Payment Device Settings function allows for only one record into which you establish the default wireless payment device settings. You cannot change the name and number assigned to this record.

Group bar: Timeouts

Swipe timeout in seconds — Specifies the number of seconds from 0 to 180, allowed for a guest to insert or slide a payment card on the payment device before the system cancels the transaction. We recommend 20 seconds. **Documented Version:** v14.1.

Confirm amount due timeout in seconds — Specifies the number of seconds, from 0 to 180, allowed to confirm or reject the amount of the voucher presented by the payment device before the system cancels the transaction. We recommend 20 seconds. **Documented Version:** v14.1.

Approved message timeout in seconds — Specifies the number of seconds, from 0 to 180, allowed for viewing the approved status of the transaction presented by the payment device. We recommend 10 seconds. **Documented Version:** v14.1.

Declined message timeout in seconds — Specifies the number of seconds, from 0 to 180, allowed for viewing the declined status of the transaction presented by the payment device. We recommend 10 seconds. **Documented Version:** v14.1.

Group bar: Languages

Under the 'Languages' group bar, select the language to appear to the employee on the PIN pad device. You must select at least one language. If you select both English and French, the employee must choose a language each time they log in to a PIN pad device. Note: The card issuer controls the language that appears to the guest when using a PIN pad device, including the voucher.

English — Sets the display language to appear to the employee on the wireless PIN pad device to English. If you select both English and French, the employee must select the language to use on the PIN pad device for each transaction. **Documented Version:** v14.1.

French — Sets the display language to appear to the employee for the wireless PIN pad device to French. If you select both English and French, the employee must select the language to use on the PIN pad device for each transaction. **Documented Version:** v14.1.

Performance Measures

Select **Maintenance > Labor > Performance Measures** to access this function.

The Performance Measures function enables you to track individual employee performance against your desired objectives. For example, you can use performance measures to determine the average sales per guest for each employee, to see which employees are your strongest performers. You can also use performance measures to track contests, such as which employee is selling the highest number of desserts.

Performance Measures rely heavily on the categories you define in Maintenance > Menu > Categories. You will find it necessary to create general (non-sales) categories to take full advantage of the Performance Measures function. For example, to determine how well a new entrée is selling compared to all entrées, create a new category of the 'General' type and add the new entrée as the only item in the category. Using the 'Sales to sales' or 'Count to count' performance measure type, select the new category as the target category and the category containing all entrées as the base category. Performance Measures also rely heavily on sales types. If you do not select a target or base category, you must then choose a sales type: gross sales, comparative sales, or net sales.

Each employee can quickly view how they are doing using the Flash Report and the Checkout report. Managers can use the BOH Performance Measures report to view individual employee sales data by selected performance measure.

You can make a performance measure active at all times, or use the 'Activate Performance Measure' event in Maintenance > System Settings > Event Schedule to activate a performance measure, as necessary. This reduces the number of performance measures that appear on the Front-of-House (FOH) screens, checkouts, and the Back-of-House (BOH) performance measures report.



Tip

The gross sales or net sales values in the Performance Measure report take into account the options in Maintenance > Business > Store > Store Settings tab > Financials group under the 'Reports' group bar.

Performance Measure types

The system bases each performance measure type on individual employee performance. Select from the following types, when you click the New drop-down arrow to add a new performance measure:

Straight sales provides the total count and net sales value for the items sold from the designated category, or the sales value that corresponds with the sales type you choose. For example, if you designate Appetizers as the target category, the number of appetizers sold and the corresponding net sales value appears; if you choose a sales type, such as 'Net sales,' instead of a category, the net sales value for all items sold by the employee appears.

Sales per hour provides the total net sales value for items sold from the designated category, or the sales value that corresponds with the sales type you choose, divided by the number of hours/minutes the employee has been on the clock. For example, if you designate Appetizers as the target category,

and the net sales value for appetizers sold by an employee clocked in for five hours is \$35.00, the average sales per hour is \$7.00. If you choose a sales type, such as 'Gross sales,' instead of a category, and total gross sales for an employee clocked in for five hours is \$250.00, the average sales per hour is \$50.00.

Sales per check provides the total net sales value for items sold from the designated category, or the sales value that corresponds with the sales type you choose, divided by the number of guest checks owned by the employee. For example, if you designate Appetizers as the target category, and the net sales value for appetizers sold by an employee who owned five guest checks is \$35.00, the average net sales per check is \$7.00. If you choose a sales type, such as 'Gross sales,' instead of a category, and total gross sales for an employee who owned five guest checks is \$250.00, the average gross sales per check is \$50.00.

Count to guests provides the percentage of total guests who purchased an item from a designated category. For example, if you designate Appetizers as the target category, when the total guest count for a server is 21, and seven of those guests order an appetizer, the server sold an appetizer to 33% of the guests they served.

Sales to guests provides the total net sales value for the designated category, or the sales value that corresponds with the sales type you choose, divided by the number of guests served. For example, if you designate Appetizers as the target category, and the net sales value for appetizers sold by an employee who serves ten guests is \$35.00, the average net sales value for appetizers per guest is \$3.50. If you choose a sales type, such as 'Gross sales,' instead of a category, and gross sales for that same employee is \$250.00, the average total gross sales value per guest is \$25.00.

Count to count provides the total number of items sold from the designated target category divided by the total number of items sold from the designated base category. For example, if you designate desserts as the target category, and entrées as the base category, and the item count for the dessert category is 7 and for the entrée category is 35, the percentage of number of desserts sold to number of entrées sold is 20%.

Sales to sales provides the total net sales value for the designated target category, or the sales value that corresponds with the target sales type you choose, divided by the net sales value for the designated base category, or the sales value that corresponds with the base sales type you choose. For example, if you designate Appetizers as the target category, and All Items as the base category, the percentage of net sales for appetizers (\$35.00) per net sales for all items (\$220.00) is .16. If you choose a sales type, such as 'Gross sales,' instead of a specific base category and gross sales for that same employee is \$250.00, the average percentage of appetizers to total gross sales is .14.

Quick combo upsells (QS Only) provides the lump sum value, not each upsell value, of price increases that result when a guest chooses to order and pay to increase the entire size of a quick combo across all items bundled within a promotion. This performance measure appears at the bottom of the audit section on the checkout chit.

Quick combo component upsells (QS Only) provides the lump sum value of all item surcharges, not each upsell value, of price increases that result when a guest chooses to pay an item surcharge

for a larger size of a component within a quick combo. This performance measure appears at the bottom of the audit section on the checkout chit.

Quick combo component item surcharge (QS Only) provides the lump sum value of all item surcharges, not each upsell value, of price increases that result when a guest chooses to substitute one component for another more costly component with an added item surcharge. For example, a quick combo includes a medium fountain drink, yet the guest orders a medium chocolate shake. Even though you serve both in a medium cup, it costs more to make a chocolate shake, so there is an item surcharge. The performance measure metric appears at the bottom of the audit section on the checkout chit.



Note

While the quick combo performance measure types appear in the Table Service user interface, Table Service does not support the Quick Combo function and these are not valid performance measure types for this product.

Performance Measure tab

Use the Performance Measure tab to establish the objectives by which to measure employee performance.

Group bar: Settings

Name — Identifies the performance measure. Type a maximum of 15 characters.

Type — Specifies the type of performance measurement created. This option is 'read only.'

Active — Indicates the selected performance measure is active at all times. **Related Requirements:** To activate a performance measure independently, as needed, use the 'Activate Performance Measure' event in Maintenance > System Settings > Event Schedule.

Target — Indicates the parameter on which to target the performance measure. The performance measure type determines the options that appear for 'Target.' For example, you must select a performance measure type of 'Quick combo upsells,' 'Quick combo component upsells,' or 'Quick combo component item surcharge' to enable the 'Count' and 'Sales' options.

Category — Bases performance measure data on a specific category of items. **Required Options:** You must select a category from the 'Target category' drop-down list.

Count — Bases performance measure data on the number sold of a designated upsell level, or the number sold of all upsell levels. **Required Options: 1)** You must select a performance measure type of 'Quick combo upsells,' 'Quick combo component upsells,' or 'Quick combo component item surcharge' to enable this option. **2)** You must select a specific upsell level, or choose 'All Upsell Levels,' from the 'Upsell level' drop-down list.

Sales — Bases performance measure data on the sales value of a designated upsell level, or the sales value of all upsell levels. **Required Options: 1)** You must select a performance measure type of 'Quick combo upsells,' 'Quick combo component upsells,' or 'Quick combo component item surcharge' to enable this option. **2)** You must select a specific upsell level, or choose 'All Upsell Levels,' from the 'Upsell level' drop-down list.

Gross sales — Bases performance measure data on gross sales.

Comparative sales — Bases performance measure data on comparative sales.

Net sales — Bases performance measure data on net sales.

Target category — Indicates the specific category of items on which to target the performance measure. **Required Options:** Selecting 'Category' from the 'Target' drop-down list enables this option.

Upsell level — Indicates the upsell level to target. You may target a specific upsell level, such as 'Upsell level 1' or 'Upsell level 2,' or select 'All Upsell Levels' to target all levels. **Required Options:** Selecting a performance measure type of 'Quick combo upsells,' 'Quick combo component upsells,' or 'Quick combo component item surcharge' enables this option.

Base — Indicates the parameter on which to base the performance measure. **Required Options:** Selecting a performance measure type of 'Count to count' or 'Sales to sales' enables this option.

Category — Bases performance measure data against a specific category of items. **Required Options:** You must select a category from the 'Base category' drop-down list.

Gross Sales — Bases performance measure data on gross sales.

Comparative sales — Bases performance measure data on comparative sales. **Note:** The 'comparative sales' column data is the same as 'gross sales,' on reports.

Net sales — Bases performance measure data on net sales.

Base category — Indicates the specific category of items on which to base the performance measure. **Required Options:** You must select 'Category' from the 'Base' drop-down list to enable this option.

Petty Cash Account

Select **Maintenance > System Settings > Petty Cash Account** to access this function.

The Petty Cash Account function enables you to define a tracking system for petty cash transactions. There are two account types, paid in accounts for deposits to petty cash, and paid out accounts for petty cash disbursements. The Aloha POS system permits up to 60 petty cash accounts. Select from the following types, when you click the New drop-down arrow to add a new petty cash account.

Petty Cash Account types

Paid out petty cash accounts allow you to disburse cash payments.

Paid in petty cash accounts allow you to receive cash payments.



Note

The Gift Card Cash Out button function requires you stipulate a petty cash account for tracking and reporting when a guest requests the balance of their gift card in the form of cash. We recommend you create a paid out petty cash account specific to each gift card type for which you support cash out.

Petty Cash Account tab

Use the Petty Cash Account tab to configure paid in and paid out petty cash accounts for your store.

Group bar: Settings

Name — Identifies the petty cash account. Type a maximum of 15 characters.

Account type — Indicates if the petty cash account is a paid out or paid in account. This option is read-only.

Ask for description — Indicates you want the Front-of-House (FOH) system to prompt for a description for each transaction posted to this petty cash account. Type a maximum of 25 characters.

Affects total cash owed — Used to note whether activity on the account affects bank deposits. If you are simply moving money to or from the safe, the activity does not affect the deposit. If you pay money to a vendor, the activity affects the deposit.

Starting bank — Includes the current amount in this petty cash account in the starting bank amount.
Required Options: You must select an account type of 'Paid in' to enable this option.

Report as non-cash tender — Designates a specific non-cash tender, such as a specific type of gift card, under which to report the activity on this petty cash account, allowing you to track the paid out activity separately. None is a valid option. **Required Options:** You must select an account type of

'Paid out' to enable this option. If you attach a non-cash tender to a petty cash account, the transaction does not appear in the regular Paid Out section on the Checkout report but instead appears in the non-cash transactions section.

Pos Access Levels

Select **Maintenance > Labor > Pos Access Levels** to access this function.

POS access levels control security settings and the corresponding rights and privileges assigned to each security access code, for Front-of-House (FOH) terminal use. Aloha POS access levels work in conjunction with job codes. Use access levels to define whether an employee can perform specific functions without having to view and respond to the Manager Approval (JIT) screen.

You typically create access levels that correspond to a certain type of job code. For example, if your restaurant uses a cashier job code, you can create a cashier access level that indicates the rights and privileges an employee has when logged in as a cashier.

You can also mix and match access levels with different job codes, as necessary, when you assign a job code and access level to an employee record. For example, a trusted employee working as a cashier might need to perform manager functions when the manager is not present. In this situation, you can assign a cashier job code to the employee, but instead of assigning a cashier access level, you assign a manager access level. This way, the employee can log in as a cashier, and also perform manager related functions, such as approving voids, assigning drawers, and other tasks, as needed. Once you define your access levels, access Maintenance > Labor > Employees and select the appropriate access level for each job code you assign an employee.

Access Level tab

Use the Access Level tab to create a new access level and define the reports and functions available to that access level.

Group bar: Identification

Name — Identifies the access level, such as 'Manager.' Type a maximum of 10 characters.

Group bar: Aloha Takeout

Can override order capacity — Enables employees assigned this access level to authorize additional orders for a specific time frame, on a given day, in excess of the defined capacity. **Related Options:** To establish the order capacity restriction, access Maintenance > Takeout Configuration > Takeout Settings > Order Scheduling tab and select 'Enable order capacity tracking' under the 'Weekly Properties' group bar.

Can override restricted dispatch — Enables employees assigned this access level to temporarily authorize drivers to depart out of sequence to make deliveries. This option helps prevent drivers from selecting preferred routes or customers. **Related Options:** To establish the driver restriction dispatch, access Maintenance > Takeout Configuration > Takeout Settings > Options tab and select 'Restrict dispatch to longest in driver' under the 'Delivery' group bar.

Can override 'No order assignment until after bump' — Enables employees assigned this access level to assign an order to a driver before bumping the order to the delivery queue. This option is for use with Aloha Kitchen only.

Can override 'Required Aloha Loyalty member ID for ...' — Enables employees assigned this access level to override the requirement to enter an Aloha Loyalty member ID number when creating a new customer record.

Authorize deposit refunds — Enables employees assigned this access level to refund a deposit previously accepted as partial payment for a future order. **Related Options:** To establish deposit refunds, access Maintenance > Takeout Configuration > Takeout Settings > Deposits tab and select 'Enable deposits' under the 'Deposits' group bar.

Authorize deposit surrender — Enables employees assigned this access level to authorize the surrender (forfeiture) of a deposit previously accepted as partial payment for a future order. **Related Options:** To establish deposit refunds, access Maintenance > Takeout Configuration > Takeout Settings > Deposits tab and select 'Enable deposits' under the 'Deposits' group bar.

Driver management — Enables employees assigned this access level to perform driver management activities, such as closing or opening drivers.

Approve driver to driver transfers — Enables employees assigned this access level to transfer orders from one driver to another.

Change promise time for active orders — Allows employees assigned this access level to change the promise time for orders already released and available in the 'Pick Up' or 'Dispatch' screen. This allows the employee to move the order to another time or time segment based on the customer request.

Can adjust order mode charges — Makes it possible for employees assigned this access level to modify charges added to an order based on the order mode, such as delivery or mileage fees. One employee per shift should have this capability, to adjust order mode charges that appear insufficient or excessive. **Related Options:** To establish order mode charges, access Maintenance > Takeout Configuration > Takeout Settings Delivery Fees tab and select 'Enable delivery fees' under the 'Settings' group bar.

Can adjust quote time — Allows employees assigned this access level to override the quote times that appear in the Dashboard Settings screen when you touch Adjust Quote Time in the Aloha Takeout (ATO) FOH.

Can override delivery area restrictions — Allows employees assigned this access level to override the restriction for a customer identified as one from whom you will not accept a delivery order. This option also allows employees to accept orders for customer addresses outside the defined delivery area. **Related Options: 1)** To establish the delivery area restriction for customers, access Maintenance

nance > Takeout Configuration > Takeout Settings Options tab and select 'Enable restrict delivery by guest' under the 'Delivery' group bar. **2)** To establish the restriction of delivery orders to the delivery area, select 'Restrict delivery orders to delivery area' under the 'Delivery' group bar.

Can add customer credit — Enables employees assigned this access level to add a credit to a customer account. This feature is often used to compensate a customer for trouble experienced with an order. **Related Options:** To establish the ability to add customer credit, access Maintenance > Takeout Configuration > Takeout Settings > Options tab and select 'Enable customer credit' under the 'Customer Credit' group bar.

Can add/edit tax exemptions — Enables employees assigned this access level to add tax exempt status to a customer record, or to modify this status, once enabled.

Can override 'Require e-mail for new guests' — Allows employees assigned this access level to override the e-mail address requirement when entering a new guest. **Related Options:** To establish the e-mail address requirement, access Maintenance > Takeout Configuration > Takeout Settings > Customer Information tab and select 'Require e-mail for new guests' under the 'Customer information' group bar.

Can override tax locale — Allows employees assigned this access level to override the tax locale for a specific order. **Related Options:** To establish tax by destination, access **Maintenance > Takeout Configuration > Takeout Settings > Order Modes tab > Order Modes Properties tab** and select 'Enable tax by destination (requires POS 13.1)' for an order mode under the 'Settings' group bar.

Can edit guest name — Enables employees assigned this access level to change the name of an Aloha Takeout guest. **Required Options:** You must couple this option with 'Prompt for new guest creation on name change' in Maintenance > Takeout Settings > Customer Information tab.

Can override 'Require customer first name' — Enables employees assigned this access level to override the entry of the first name for a guest record when this is a required entry. **Required Options:** To require the entry for the first name for a guest record, select 'Require customer first name' in Maintenance > Takeout Configuration > Takeout Settings > Customer Information tab.

Can override 'Require customer last name' — Enables employees assigned this access level to override the entry of the last name for a guest record when this is a required entry. **Required Options:** To require the entry for the last name for a guest record, select 'Require customer last name' in Maintenance > Takeout Configuration > Takeout Settings > Customer Information tab.

Can override 'Require customer address' — Enables employees assigned this access level to override the entry of the address for a guest record when this is a required entry. **Required Options:** To require the entry for the customer address for a guest record, select 'Require customer address' in Maintenance > Takeout Configuration > Takeout Settings > Customer Information tab.

Can override 'Require state for address' — Enables employees assigned this access level to override the entry of the state in which the customer resides for a guest record when this is a required entry. **Required Options:** To require the entry for the state in which the customer resides for a guest record, select 'Require customer state for address' in Maintenance > Takeout Configuration > Takeout Settings > Customer Information tab.

Can override 'Require company name for office address' — Enables employees assigned this access level to override the entry of the name and address of the office for which the customer works for a guest record when this is a required entry. **Required Options:** To require the entry for the address of the office for which the guest works for a guest record, select 'Require customer name for office address' in Maintenance > Takeout Configuration > Takeout Settings > Customer Information tab.

Can override 'Require zip code for address' — Enables employees assigned this access level to override the entry of the zip code in which the customer resides for a guest record when this is a required entry. **Required Options:** To require the entry for the zip code in which the guest resides for a guest record, select 'Require customer zip code for address' in Maintenance > Takeout Configuration > Takeout Settings > Customer Information tab.

Can override 'Require phone number' — Enables employees assigned this access level to override the entry of the phone number of the customer when this is a required entry. **Required Options:** To require the entry of a phone number for a guest record, select 'Require phone number' in **Maintenance > Takeout Configuration > Takeout Settings > Phone Numbers tab.**

Can override 'Require extension for guest office phone ...' — Enables employees assigned this access level to override the entry of an office phone number extension when this is a required entry. **Required Options:** To require the entry of an office phone number extension for a guest record, select 'Require extension for guest office phone numbers' in Maintenance > Takeout Configuration > Takeout Settings > Phone Numbers tab.

Can override 'Always refund deposit to original tender' — Enables employees assigned this access level to override the 'Always refund deposit to original tender' restriction in Aloha Takeout. **Required Options:** To force you to refund a deposit to the same tender used to pay the deposit, select 'Always refund deposit to original tender' in Maintenance > Takeout Configuration > Takeout Settings > Deposits tab.

Can override Loyalty validation failure — Allows all employees clocked in with this access level to override the validation of a Generic Loyalty ID added or edited for a guest record. **Documented Version:** v19.3.

Can add/edit fiscal ID — Enables employees assigned this access level to add, edit, and remove the fiscal ID for an Aloha Takeout guest record. **Required Options:** You must select 'Enable customer fiscal ID' in Maintenance > Takeout Configuration > Takeout Settings > Customer Information tab to allow an employee to enter a fiscal ID number for an Aloha Takeout order.

Group bar: Reports

Restaurant Sales — Allows employees assigned this access level to run the FOH Restaurant Sales Report from the FOH terminal.

Server Sales — Allows employees assigned this access level to run the FOH Server Sales report from the FOH terminal.

Manager Flash — Allows employees assigned this access level to view the FOH configured sales reports from the FOH terminal.

Payment — Allows employees assigned this access level to run the Payment report from the FOH terminal. This report prints credit card payments only.

Employee Breaks — Allows employees assigned this access level to run the FOH Employee Breaks report from a POS terminal.

Custom Reports — Allows employees assigned this access level to run any custom reports.

Restaurant sales and labor statistics — Allows employees assigned this access level to view the FOH Restaurant Sales and Labor Statistics report.

View FOH labor reports — Allows employees assigned this access level to view the FOH Labor reports.

Server Tip — Allows employees assigned this access level to view the FOH Server Tip report that shows details about their checks, including check numbers, open and close times, the check total, the tip amount, and more. This report is very beneficial for servers who work in a cashier environment in which the server is not responsible for closing their own checks. They can also print a Server Tips report to the local receipt printer.

Group bar: Financial

Assign promo — Allows employees assigned this access level to apply a promotion to guest checks. This ability is generally reserved for managers.

Delete promo — Allows employees assigned this access level to delete a promotion from the check.

Assign comp — Allows employees assigned this access level to apply a comp to guest checks. This is generally reserved for managers.

Delete comp — Allows employees assigned this access level to delete a comp from the check.

Assign day part — Allows employees assigned this access level to manually set the current meal period. **Required Options:** You must select this option with 'Manual Day Parts' in Store Settings. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Assign Day Part button on a panel to appear on the FOH terminal.

Split checks — Allows employees assigned this access level to split a guest check into separate checks without manager approval. **Related Options:** You cannot split a check that contains unordered items. If 'Do not send items' under the 'Settings' group bar in Maintenance > System Settings > Order Mode is selected, items remain unordered when you access the Close screen and the Split Check function is unavailable. To correct this, you must return to the order and apply an order mode that sends the items to the kitchen and then return to the Close screen to perform the split check function. **Related Requirements:** In Quick Service, you must access Maintenance > Menu > Screen Designer and add the Split Check button function to your Close screen panel.

Reopen check — Allows employees assigned this access level to reopen a check that was closed by another employee. **Related Requirements:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Reopen Check button on a panel to appear on the FOH screen.

Reprint check — Allows employees assigned this access level to reprint clock-outs, checkout reports, and guest checks.

Void items — Allows employees assigned this access level to void ordered items from a check, for another employee, without manager approval. **Related Options: 1)** The manager password prompt appears. If 'Void items' selected, the employee uses their employee password, and then types the void reason to complete the void. **2)** If 'Void items' cleared, a manager must complete the void. The void reason appears on the Void Report.

Cash drawers — Allows employees assigned this access level to perform cash drawer management and petty cash functions.

Cash drawer checkout — Allows employees assigned this access level to perform drawer checkouts. If cleared, a screen requiring manager approval appears when you perform a drawer checkout.

Approve cash drops — Enables employees assigned this access level to approve cash payments that exceed the defined cash tender type threshold, and then perform a cash drop. **Required Options:** You must access Maintenance > System Settings > Order Mode > Order Mode tab and define an amount in 'Require manager approval for Cash tender type over threshold' under the 'Settings' group bar to enforce manager approval and operational procedures requiring a cash drop. **Documented Version:** v12.3.

Allow cash drops on behalf of self-banking employees — Allows employees assigned this access level, typically managers, to approve cash drops from self-banking employees.

Resend chit to kitchen — Allows employees assigned this access level to print a new kitchen chit by resending one or more items to the kitchen. This is useful in situations where an order with a missing item is delivered to a table or when the kitchen staff misplaces a kitchen chit. **Related Requirements:** You must also access Screen Designer and add the Resend to Kitchen button function to a panel.
Documented Version: v12.3.

Override category limits — Allows employees assigned this access level to override any item limit defined for a category. **Related Options: 1)** Access Maintenance > Menu > Categories > Category tab and specify the maximum number of items allowed in 'Maximum per check' under the 'Settings' group bar to define an item limit for a category.

Delete payments — Allows employees assigned this access level to delete a payment from a check. If cleared, the manager approval screen appears when an employee without sufficient access tries to delete a payment.

Adjust payments — Allows employees assigned this access level to adjust payments, comps, promos, order mode charges, maximum tip percentages defined for the tender, and more for other employees. This is generally reserved for a manager. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Adjust Payments button on a panel to display on the FOH.

No sale — Allows employees assigned this access level to access the 'No Sale' function on the FOH terminal and open a cash drawer. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Open Drawer button on a panel to display on the FOH.

Cash refunds — Allows employees assigned this access level to issue cash refunds.

Non-cash refunds — Allows employees assigned this access level to issue refunds for non-cash tenders other than credit cards, such as room charges, accounts receivable charges, and gift certificates.

Credit card refunds — Allows employees assigned this access level to issue credit card refunds.

Manual credit card number — Allows employees assigned this access level to bypass manager approval when attempting to manually enter a credit card or gift card number. **Related Options:** The manager approval screen appears if you access an appropriate tender type in Maintenance > Payments > Tenders > Type tab and select 'Use magnetic card only' under the 'Options settings' group bar, or 'Use Mag Card Only' in the Aloha Loyalty Configuration wizard.

Force payment authorization — Allows employees assigned this access level to force authorization on credit card and gift card payments.

Approve offline hotel charges — Allows employees assigned this access level to approve and post hotel charges when the POS system cannot connect to the property management system in use.

Related Options: When you select 'Allow offline charges' for a tender of the 'Property management' type in the Tenders function, the Manager Approval screen appears for anyone without sufficient access.



Reference

Refer to the Aloha PMS Integration Guide for more information.

Override security verifications on tenders — Allows employees assigned this access level to bypass the security verification options for tenders.

Resend failed credit card transaction — Enables employees assigned this access level to send a failed transaction to the host a second time for authorization. The employee must first select the failed credit card transaction on the guest check, and then touch the 'Resend' button to send the transaction back to the processor. **Related Requirements:** You must access Quick Service Screen Designer and create a 'Resend Failed Credit Card Transaction' button.

Override gift card restrictions — Allows all employees assigned this access level to override restrictions placed on gift cards, such as applying a gift card as payment twice in the same day and applying a gift card as payment on the same day on which the card is activated. **Documented Version:** v12.3.

Enable cash out from gift card — Allows employees assigned this access level to cash out a Givex gift card upon demand from the guest. **Documented Version:** v15.1.

Approve additional Aloha Loyalty member transactions — Allows employees assigned this access level to enable the check to count toward Aloha Loyalty rewards, after the member has reached the maximum number of visits per day, as configured in the Aloha Loyalty program. **Related Options:** This option overrides the 'Max Visits' option in the Aloha Loyalty Configuration wizard.

Approve manual Aloha Loyalty card number — Allows employees assigned this access level to manually enter an Aloha Loyalty card number, without manager approval. It also allows this same employee to enter a password to continue, when they attempt to manually enter the Aloha Loyalty card number without sufficient access. **Related Options:** This option overrides the 'Use Mag Card only' option in the Aloha Loyalty Configuration wizard.

Approve Aloha Loyalty card assignment — Allows employees assigned this access level to approve the assignment of a member to a check for cards with 'Require Manager Approval' selected in the Aloha Loyalty Configuration wizard.

Approve Aloha Loyalty member lookup — Allows employees assigned this access level to perform a manual loyalty guest lookup using an alternate ID, such as a name, phone number, or email address, without requiring manager approval. **Documented Version:** v14.1.

Restricted tender group for this access level — Restricts employees assigned this access level to applying payments using only the tenders defined in the specified tender group. An employee with sufficient access must approve any tender not defined within the assigned tender group. 'None' is a valid option, which allows the use of all tenders. **Related Requirements:** You create tenders in Maintenance > Payments > Tenders.

Assign price change — Allows employees assigned this access level to override the current price in effect for an order with a price change. Only valid price changes, where today's date is between or inclusive of the start date and end date defined in Maintenance > Pricing > Price Changes, appear on the screen for selection. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Assign Price Change button on a panel to appear on the FOH.

Override split check limits — Allows employees assigned this access level to override both the time limit for check activity after initiating the split check function and the limit on the number of split check functions allowed for a check after printing any check in the split. The manager approval screen appears when an employee exceeds either of these limits and a manager must enter their password to allow the employee to continue working with the check.

Edit price change events — Enables employees assigned this access level to ignore, cancel, or immediately activate a price change event scheduled for the day, from a FOH terminal. You must access Screen Designer and add an Edit Price Change Events button to a panel in use.

Override EMV verifications — Enables employees assigned this access level to slide the EMV-enabled card through a magnetic stripe reader (MSR) on the FOH only as a backup and optional solution. **Documented Version:** v15.1.

ps.

Manage Connected Payments — Controls access to certain Connected Payments functions in the FOH.

Group bar: Employee

Approve clock in — Allows employees assigned this access level to approve clock-in transactions.

Approve checkout — Allows employees assigned this access level to approve checkout transactions.

Delete checkout — Allows employees assigned this access level to delete checkout transactions. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Delete Checkout button on a panel to appear on the FOH terminal.

Approve clock out — Allows employees assigned this access level to approve clockout transactions.

Delete clock out — Allows employees assigned this access level to delete clockout transactions.

Related Requirement: You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Delete Clockout button on a panel to appear on the FOH terminal.

Approve start/end breaks — Allows employees assigned this access level to approve an early break return. This applies to mandated unpaid breaks.

Clear password — Allows employees assigned this access level to clear passwords for other employees. You typically reserve this option for managers. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Clear Password button on a panel to appear on the FOH terminal.

Enroll fingerprints — Allows employees assigned this access level to assign login access to employees, using the fingerprint scanner system.

Force reconciliation — Allows employees assigned this access level to force reconciliation, even if the number of attempts at reconciliation exceeds the number specified. You typically reserve this option for managers. **Related Options:** Access Maintenance > Hardware > Cash Drawers > Cash Drawer tab and select 'Perform drawer reconciliation' and 'Number reconciliation attempts' under the 'Settings' group bar to define the number of reconciliation attempts allowed per drawer.



Reference

Refer to the [Drawer Reconciliation Feature Focus Guide - HKS310](#) for more information.

Force coupon audit — Allows employees assigned this access level to override the system error message and force a reconciliation of a coupon audit, after exceeding the defined number of attempts.

Open any drawer — Allows employees assigned this access level to open cash drawers associated with a specific terminal. You must have a reason for opening the drawer. The event appears in the audit log recorded in the same way as a No Sale event

De-assign drawers — Allows employees assigned this access level to remove employee access to their assigned cash drawers. This is typically a manager function.

Enter open items — Allows employees assigned this access level to ring up open items on the FOH terminal. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the PLU List button on a panel to appear on the FOH terminal.

Access quick count screens and reports — Allows employees assigned this access level to access Quick Count screens and reports on the FOH and BOH terminals. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add a Quick Count button for each count type on a panel to appear on the FOH screen.



Reference

Refer to the [Quick Count Feature Focus Guide - HKS316](#) for more information.

Enter pay adjustments — Allows employees assigned this access level to enter Pay Adjustments from the FOH manager screen. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Pay Adjustments button on a panel to appear on the FOH manager screen.

Release locked employee — Allows employees assigned this access level to release a lock file and enable an employee to log back into the system after a power outage or equipment failure event causes the system to freeze. This issue only occurs with handhelds and devices running through COM. **Related Requirements:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the 'Release Locked Employee' button on a panel to appear on the FOH manager screen.



Caution

Unlocking an in-store employee who is actively using a terminal may cause serious transaction corruption and discrepancies in sales and reports.

Edit FOH labor — Enables employees assigned this access level to edit or add a break or shift, and to adjust break minutes.

Assign pen IDs — Allows employees assigned this access level to assign Pen IDs to other employees for system access. **Related Requirement:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Assign Pen ID button on a panel to appear on the FOH screen.

Approve interactive message response — Allows employees assigned this access level to approve interactive messages, requiring manager approval, before an employee can continue with the clock in or clock out function.

Group bar: System

Reroute devices — Allows employees assigned this access level to reroute printers, printer groups, or remote display systems.

End of day — Allows employees assigned this access level to manually run end-of-day (EOD) functions from the FOH terminal. **Related Requirements: 1)** You must schedule the EOD process as an event in Maintenance > System Settings > Event Schedule to enable it to be automatic. **2)** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the EOD button function on a panel to appear on the FOH screen.

Shutdown terminal — Allows employees assigned this access level to close the FOH. The system proceeds directly to the Windows shutdown screen. This applies only to terminals running Microsoft Windows 95 and prevents employees from simply turning off the machine, which could cause data corruption. **Related Requirements:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Shutdown Term button function to a panel to display on the FOH.

Calibrate touchscreen — Allows employees assigned access level to calibrate the touch-screen server terminals. **Related Requirements:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels, and add the Calibrate button function on a panel to display on the FOH.

Query cash card balance — Allows employees assigned this access level to query the balances of cash cards. **Related Requirements:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the Query Cash Card Balance button function on a panel to display on the FOH.

View alerts — Enables employees assigned this access level to view alerts on the FOH terminal. **Documented Version:** v12.3.

Dismiss alerts — Enables employees assigned this access level to dismiss alerts on the FOH terminal. **Documented Version:** v12.3.



Reference

Refer to the [Alerts Feature Focus Guide - HKS334](#) for more information.

Price Changes

Select **Maintenance > Pricing > Price Changes** to access this function.

The Price Changes function offers flexibility in managing item pricing and eliminates the need to ever manually change a price. Use the Price Changes function to change the price of individual items, price levels, and promotions, all at the same time. The change can be temporary, or you can maintain all your pricing using only the Price Changes function.

Note

Do not use the 'Button price' pricing method in either the Modifier Groups or Submenus functions, if you want to use the Price Changes function to manage temporary price modifications.

Additionally, you can stipulate the maximum number of items or promotions allowed in one price change. Access Maintenance > Business > Installed Products > Global tab and type a value in 'Maximum number of item price changes in thousands' and 'Maximum number of promotion price changes in thousands' under the 'Item limits' group bar. If you attempt to include more items or promotions in a price change than the values specified here, a warning message appears indicating you exceeded the maximum value. For example, if you defined the 'Maximum number of promotion price changes in thousands' as five, you can activate a price change for up to 5000 promotions.

Caution

Activating more than 5000 new prices using the Price Changes function uses an extreme amount of memory and affects processor speed. If you implement this feature, please ensure your site controllers have a fast processor.

Activating Price Changes

You must create an event in Maintenance > System Settings > Event Schedule to control when a price change takes effect and for how long. Use the 'Set Price Change' event type to activate a price change. You can set up multiple 'Set Price Change' events, to organize subsequent price changes. When the current price change expires, the next price change event in the schedule takes its place.

You can also use the 'Disable Price Change' event to stop a price change before EOD occurs, such as when you need happy hour items to return to regular pricing for the current day. If a 'Disable Price Change' event is not defined for a price change, the price change becomes inactive when the EOD occurs.

Price Changes quick tips:

You must consider these additional rules when you manage price changes:

- You can change the price of individual items, price levels, and promotions in a single price change.
- If you plan to use the Price Change function to manage all your pricing, it is best not to assign a default price to the item or the price level.
- You must use the 'Events Schedule' function to activate a price change or stop a price change that needs to end before the EOD occurs.
- You must select a button pricing method of 'Item price' or Price level' in the Modifier Group and Submenu functions to manage temporary prices using Price Changes.
- You can activate up to the number of items and promotions specified under the 'Item limits' group bar in Maintenance > Business > Installed Products in a single price change. For example, if you set the 'Maximum number of promotion price changes in thousands' to five, you can select a maximum of 5000 promotions to activate per price change.
- Activating more than 5000 price changes using the Price Changes function uses an extreme amount of memory and affects processor speed. If you implement this feature, please ensure your site controller has a fast processor.

Price Change tab

Use the Price Change tab to set up basic information about the price change, such as a descriptive name.

Name — Identifies the price change. Type a maximum of 20 characters.

POS activation start date — Indicates the first date the POS can use the price change. You must select a date from the calendar to save the price change. Because you stipulate a start date for a price change using the 'Set Price Change' event type in Event Schedule, if the start date you enter here in this function is later than the start date in the event, the price change does not become active at the store as scheduled. We recommend you select an arbitrary date, such as 01/01/1989, to ensure there is not a conflict with the event start date.

POS activation end date — Indicates the last date the POS can use the price change. You must select a date from the calendar to save the price change. Because you stipulate an end date for a price change using the 'Set Price Change' event type in Event Schedule, if the end date you enter here in this function is earlier than the end date in the event, the price change becomes inactive too soon. We recommend you select an arbitrary date, such as 01/01/2060, to ensure there is not a conflict with the event end date.

Items tab

All items in the Items function appear on this tab, along with the default price of the item. Use the Items tab to temporarily change the default price of an item, or to change the price that occurs

because of another price change. When you enter a new price on the Items tab, the system shows the action as a result of the price change. For example, you may want to temporarily reduce the price of Mozzarella Sticks from \$6.50 to \$3.25 during 'Happy Hour.' Locate the item on the tab, type \$3.25 in the 'Price' column. The system compares the two prices and 'Decreased \$3.25' appears in the 'Action' column. When you activate the price change using Maintenance > System Settings > Event Schedule, the selected items appear at reduced prices for the specified dates and times.

Note

When you create a price change for an item, the system validates the new price against the 'Minimum price' and 'Maximum price' set in Maintenance > Menu > Items on the Pricing tab. A red X appears on the screen when the price is either too high or too low, and an error indicating you are out of the acceptable range appears when you try to save the price change.

Name — Identifies the item as defined on the Item tab in the Items function. This column is 'read only.'

Compare — Shows the default price for the item as it exists either in the Items function, an active price change, or another specific price change of your choosing. Click the ellipsis (...) located at the bottom of the Items tab to select the type of price to appear in the 'Compare' column. The system compares the price in 'Compare' to the value you enter in the 'Price' column and the result appears in the 'Action' column.

Item price — Compares the value you enter in 'Price' to the default price for each item found on the Pricing tab in the Items function. If there is not a price assigned to the item in the Items function, a default price of zero (\$0.00) appears. **Note:** This is the default comparison option.

Current price change — Compares the value you enter in 'Price' to the active price change for the item.

Other price change — Compares the value you enter in 'Price' to the chosen price change for the item. When you select 'Other price change' you must choose a specific price change to compare against the value you enter in the 'Price' column.

Price — Specifies the new price to assign to the item while the price change is in effect.

Action — Calculates the variance between the price in 'Compare' and the value you enter in the 'Price' column and displays the action resulting from the price change.

- Added - Indicates a new price change amount for which no previous price change amount existed in the database.
- Removed - Indicates you cleared a price change amount for which a previous price change amount existed in the database.

- Increased - Indicates an increase to the price and by how much.
- Decreased - Indicates a decrease to the price and by how much.

Price Levels tab

Price levels allow you to establish a price for a group of items that carry the same price. For example, all medium soft drinks are \$1.15, so you create a \$1.15 price level and attach it to all medium soft drinks. You define price levels in Maintenance > Pricing > Price Levels and all defined price levels appear here on the Price Levels tab. Use the Price Levels tab to temporarily change the price for a price level, or to change the price that occurs as a result of another price change. For example, you can create a price change to temporarily change the price of medium soft drinks to \$1.00, so that you can sell soft drinks at a reduced price during a weekly event at your store.



Note

When you create a price change for a price level, the system validates the new price against the 'Minimum price' and 'Maximum price' set on the Price Level tab in Maintenance > Pricing > Price Level. A red X appears on the screen when the price is either too high or too low, and an error indicating you are out of the acceptable range appears when you try to save the price change.



Caution

If you attempt to include more than 5000 price levels in a price change, an error message appears, indicating you have exceeded the maximum allowed.

Name — Identifies the price level as defined on the Price Level tab in the Price Level function. This column is read-only.

Compare — Shows the price for the price level as it exists in the Price Level function, an active price change, or a specific price change of your choosing. Click the ellipsis (...) located at the bottom of the Price Levels tab to select the type of price to appear in the 'Compare' column. The system compares the price in 'Compare' to the value you enter in the 'Price' column and the result appears in the 'Action' column.

Default price — Compares the value you enter in 'Price' to the default price for each price level, found on the Price Level tab in the Price Level function. **Note:** This is the default comparison option.

Current price change — Compares the value you enter in 'Price' to the active price change for the price level.

Other price change — Compares the value you enter in 'Price' to the chosen price change for the price level. When you select 'Other price change' you must choose a specific price change to compare against the value you enter in the 'Price' column.

Price — Specifies the new price to assign to the price level while the price change is in effect.

Action — Calculates the variance between the price in 'Compare' and the value you enter in the 'Price' column and displays the action resulting from the price change.

- Added - Indicates a new price change amount for which no previous price change amount existed in the database.
- Removed - Indicates you cleared a price change amount for which a previous price change amount existed in the database.
- Increased - Indicates an increase to the price and by how much.
- Decreased - Indicates a decrease to the price and by how much.

Promos tab

Promotions allow you to offer special prices to your guests in the way of coupons, BOGOs, group combos, and more. For example, you can define a kids meal promotion that offers a sandwich, drink, and cookie for \$3.50, and these same items would sell for \$4.00 if ordered separately. You define promotions in Maintenance > Payments > Promotions and all defined promotions appear here on the Promo tab. Use the Promo tab to control the pricing of your promotions through price changes, such as temporarily change the price for a promotion or change the price that occurs as a result of another price change. For example, you can create a price change to offer the kids meal promotion for \$3.00 between the hours of 4:00 and 7:00 p.m. on Sundays. Depending on the type of promotion, you can define the price change as a percentage rather than a specific amount.

Note

When you create a price change for a promotion, the system validates the new price against the 'Maximum amount' set in Maintenance > Payments > Promotions > Promotion tab. A red X appears on the screen when the price is too high, and an error indicating you are out of the acceptable range appears when you try to save the price change.

Name — Identifies the promotion as defined on the Promotion tab in the Promotions function. This column is 'read only.'

Compare — Shows the price or percentage discount of a promotion as defined in the Promotions function, an active price change, or a specific price change of your choosing. Click the ellipsis (...) located at the bottom of the Promos tab to select the type of price to appear in the 'Compare' column. The system compares the price in 'Compare' to the value you enter in the 'Price' column and the result appears in the 'Action' column.

Item price — Compares the value you enter in 'Price' to the default price or percentage discount for the item as defined in the Promotions function. If there is not a price assigned to the item in the Promotions function, a default price of zero (\$.00) appears. **Note:** This is the default comparison option.

Current price change — Compares the value you enter in 'Price' to the active price change for the promotion.

Other price change — Compares the value you enter in 'Price' to the chosen price change for the item. When you select 'Other price change' you must choose a specific price change to compare against the value you enter in the 'Price' column.

Change — Specifies the new price or percentage to assign to the promotion while the price change is in effect. Type a percentage as a number and two decimal places. For example, type a percentage of 50% as 50.00.

Action — Calculates the variance between the price or percentage in 'Compare' and the value you in the 'Change' column and displays the action resulting from the price change.

- Added - Indicates a new price change amount for which no previous price change amount existed in the database.
- Removed - Indicates you cleared a price change amount for which a previous price change amount existed in the database.
- Increased - Indicates an increase to the price or percentage and by how much.
- Decreased - Indicates a decrease to the price or percentage and by how much.

Price Level

Select **Maintenance > Pricing > Price Level** to access this function.

The Price Level pricing method enables you to assign a common price to a group of items. Any time you have a group of like-priced items, you can use a price level to control prices for those items. For example, if you sell all medium soft drinks at the same price, regardless of the brand, you can create a price level for a 'Medium Soft Drink' and assign that price level to each medium soft drink item in the item database using the 'Items' function. That price then appears on the POS terminal when a customer orders a medium soft drink. If you decide to change the price of your medium soft drinks, simply change the price of the 'Medium Soft Drink' price level, and every item assigned this price level changes accordingly.

Price Level tab

Use the Price Level tab to control prices for select items.

Group bar: Identification

Name — Identifies the price level. Type a maximum of 30 characters.

Default price — Indicates the price to charge for each item assigned the price level.

Group bar: Constraints

Minimum price — Indicates the lowest price a store can assign, if they override the current price level. This option is read-only when you log in as a store-level employee.

Maximum price — Indicates the highest price a store can assign, if they override the current price level. This option is read-only when you are logged in as a store-level employee.

Allow site override — Enables each store to change the price of the item using the Price Changes function. If you clear this option, store-level operators can view the price, but they cannot change the price. This check box is available at the 'corporate level' only.

Print Designer

Select **Maintenance > Hardware > Print Designer** to access this function.

The Aloha POS system provides a generic layout for the guest check and for chits that print in your restaurant. You can do limited customization to these layouts using options available in functions like Store Settings, Printers, and others. Print Designer provides the ability to create custom layouts with much more flexibility on what prints on a guest check or chit, as well as increased control over the positioning of the information. Using Print Designer, you can change the layout of your chits, guest check, and campaign vouchers. You can create as many custom layouts as needed to fit your business needs.



Note

When integrating with Aloha Kitchen, you can choose to use a custom layout for your printed chits, if it is of the 'Production chit' or 'Order taker' type.



Reference

Refer to the [Print Designer Feature Focus Guide - HKS375](#) for a complete list and description of the elements available for each layout type.

Printer Groups

Select **Maintenance > Hardware > Printer Groups** to access this function.

After you define printers in Maintenance > Hardware > Printers, use the Printer Groups function to combine them into logical groups for printing. You can handle virtually any printing situation by assigning such things as menu items to a dedicated printer group. You can then reroute all items assigned to a specific printer group, when necessary, without having to reroute each item individually.

For example, you assign the bar printer to printer group 1, the fry printer to printer group 2, the grill printer to printer group 3, and the cold station printer to printer group 4.

You place an order for the following items:

- Corona Beer (printer group 1)
- Chicken Platter w/Fries (printer group 2)
- Cheesecake (printer group 4)

The Corona Beer routes to printer group 1 (Bar Printer), the Chicken Platter routes to printer group 2 (Grill Printer), the Fries route to printer group 3 (Fry Printer), and the Cheesecake routes to printer group 4 (Cold Station Printer). This way, each item routes to the appropriate station for preparation.

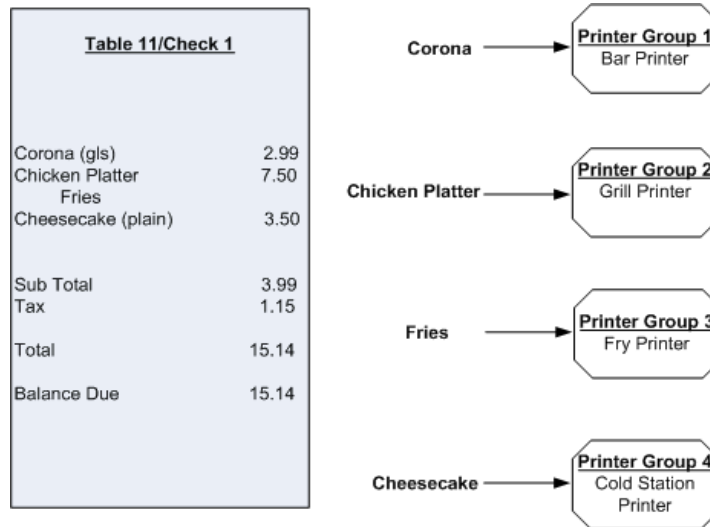


Figure 4 - 6 Printer Groups Matrix Example

If you send the fry cook home early, you can reroute printer group 3 (Fry Printer) to printer group 2 (Grill Printer), so the grill cook knows to also prepare the fries, as well as any other item that normally prints to printer group 3. You can also reroute printer groups manually, or automatically, through the use of scheduled events.

Printer Group tab

Use the Printer Group tab to identify your printer groups.

Group bar: Settings

Name — Identifies the printer group. We recommend you use a name identifying the purpose of the printer group (e.g., Kitchen, Counter, Drive-Thru). This option has a maximum value of 40 characters.

Printer tab

The Printer tab enables you to assign one or more printers to a printer group, by moving printers from the 'Available' list on the left side of the screen to the 'Included' list on the right side of the screen. To assign a printer to a printer group, you must already have the printer configured in the system. The printers that currently exist in the database appear in the 'Available' list. The printers currently assigned to the printer group appear in the 'Included' list.

Use the >> and << arrows to move printers between the 'Available' list and the 'Included' list. The column headings that appear in the 'Available' and 'Included' lists are as follows:

Number — Indicates the number of the printer record.

Name — Identifies the printer.

Printers

Select **Maintenance > Hardware > Printers** to access this function.

Use the Printers function to define the physical connections between terminals and printing devices. Each printer must connect to a terminal and should have an assigned backup printer to use in the event of hardware failure. After you define printers, you can group them together logically using Maintenance > Hardware > Printer Groups, for use with other components of the Aloha system.

Applications

When you create a new printer in the database, you must select the application that controls the printer you want to create. The application you select determines the tabs and options that are available to you for configuration of that printer. For example, selecting Aloha Kitchen as the Application provides fewer models for selection in the 'Models' drop-down list than for the Aloha POS application. Select from the following applications when you click the New drop-down arrow to add a new printer:

Aloha Point of Sale indicates either Aloha Table Service or Aloha Quick Service is routing print jobs to this printer.

Aloha Takeout indicates the printer is a label printer for use with Aloha Takeout. At the time of this writing, we support the Bixolon SLPD420, the Datamax E4203 (supported for legacy installs only), the Epson TM-L90, and the Zebra LP2044.

Aloha Kitchen indicates a terminal configured as an Aloha Kitchen terminal is routing print jobs to this printer, such as chits for bumped orders.

Printer tab

The Printer tab enables you to configure a printer to take maximum advantage of the built-in features and flexibility.

Group bar: Settings

Name — Identifies the printer. We recommend using a name descriptive of the purpose of the printer (e.g., Kitchen, Counter, Drive-thru). Type a maximum of 25 characters.

Model — Designates the model of the printer you are configuring. The drop-down list contains a list of typical printers that work with Aloha. There may be more or less models available for selection depending on the application controlling the printer. The model you select also determines other options that may become available.



Note

For all slip printers, define the 'Prefix Lines' and 'Lines Per Sheet' in Store Settings; otherwise, only one line at a time prints and feeds the paper until it runs out.

Use native network interface — Designates the printer requires an IP address and port to communicate with the system. **Required Options: 1)** You must select Aloha Takeout or Aloha Kitchen as the application and a label printer from the 'Model' drop-down list to enable this option. It is the default selection for the Bixolon SLPD420 model and cannot be cleared. **2)** When selected, you must specify a 'Network address' and 'Network port;' otherwise, you specify the terminal to which you attach the printer and the COM port.'

Network address — Designates the network IP address set on the printer. **Required Options:** You must select Aloha Takeout or Aloha Kitchen as the application and a label printer from the 'Model' drop-down list to enable this option.

Network port — Designates the port to which you connect the printer. Leave this at the default value of 9100 unless your network administrator requires another port number. **Required Options:** You must select Aloha Takeout or Aloha Kitchen as the application and a label printer from the 'Model' drop-down list to enable this option.

Label size — Designates the size and orientation of the label you wish to print using this printer. **Required Options:** You must select Aloha Takeout as the application to enable this option.

Size 4x2 — Prints labels in landscape orientation. Recommended for pizza operations.

Size 2x4 — Prints labels in portrait orientation. Recommended for sandwich operations, and is supported on the Datamax and Zebra models only.



Reference

Refer to the [Label Printing Feature Focus Guide - HKS369](#) for more information on configuring a label printer for use with Aloha Takeout.

Terminal — Indicates the physical terminal to which you connect this printer, if the printer is a serial printer. If this printer is one for use with the 'Aloha Kitchen' application, only terminals configured as Aloha Kitchen terminals appear for selection in the drop-down list. **Related Requirements:** You must first define your terminals in Maintenance > Hardware > Terminals.

Port — Specifies the serial port where the printer connects to the terminal. This option must reflect the hardware configuration. **Related Options:** This option does not appear when you select printer type 'Windows Printer,' 'OPOS,' or 'Fiscal Manager.'

Backup printer — Identifies a backup printer to use in the event of hardware failure. **Related Options:** If the originally designated printer fails for longer than the time interval specified in 'Reroute timeout seconds' under the 'Option settings' group bar on the Options tab, the system reroutes output to the backup printer.

Label printing width in millimeters — Designates the label width, in millimeters, for labels printed from this printer. **Required Options:** You must select Aloha Kitchen as the application and Epson TM-L90 from the 'Model' drop-down list to enable this option.

Label printing text margin in millimeters — Allows you to change the width for indentation of text for label chits. **Required Options:** You must select Aloha Kitchen as the application and Epson TM-L90 from the 'Model' drop-down list to enable this option.

Label printing text size in points — Designates the size of the text for labels printed from this printer. **Required Options:** You must select Aloha Kitchen as the application and Epson TM-L90 from the 'Model' drop-down list to enable this option.

OPOS name — Identifies the OPOS printer driver file as it appears in the registry editor. (Note: You must first install the driver files.) This option has a maximum value of 30 characters. **Required Options: You must** select Aloha Point-of-Sale as the application and OPOS from the 'Model' drop-down list to activate this option. **Related Requirements:** To determine how the name appears in the registry editor, access a DOS command line, type REGEDIT and press Enter. The registry editor appears. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and MSR. The installed drivers list appears under MSR.

Send non-checks to — Establishes the printer to which non-check print jobs are sent. Print jobs of this nature might include reports generated from an order entry terminal. This option is generally used with a slip printer; however, any printer can send non-checks to another printer.

Preloaded logo — Utilizes preloaded logos stored in non-volatile RAM (NVRAM) in certain printer models. To determine the logo to use, consult the literature received with the printer or consult the printer manufacturer. **Required Options:** You must select Epson TM-80 or Radiant SRP350 from the 'Model' drop-down list to activate this option.

Code page — Associates the printer to a set of character codes for another language on Epson printers. We currently support the Euro (prints the Euro monetary symbol) and Cyrillic (Russian) character sets. **Required Options:** You must select an Epson printer or OPOS from the 'Model' drop-down list to enable this option.



Tip

The selection in 'Code page' specifies the character set for the printer, but you must also specify the character set for the terminal. To specify the character set for the terminal, select Start > Settings > Control Panel and double-click Regional Options. Match the language set for the system in Aloha CFC.

Use the following table to determine the code page settings for the corresponding language:

Printer Type	Code Page Range
Epson	858 Euro
Epson	866 Cyrillic
OPOS	http://msdn2microsfot.com/en-us/library/ms776446.aspx (provides full list of code page values.)

Suppress hard coded chit lines — Suppresses any hard-coded chit lines defined for a chit layout, which can reduce the waste of receipt paper on printers that can automatically adjust to the next break. **Required Options:** You must select Aloha Kitchen as the application and Epson TM-80 from the 'Model' drop-down list to enable this option.

Group bar: Fiscal printer settings

You must select Fiscal Manager from the 'Model' drop-down list to activate this group bar and these options.

IP address — Specifies the IP address of the fiscal manager system to which the fiscal printer connects. A fiscal printer, which is used internationally, prints certain government-required financial information on the customer receipt. Type a maximum of 150 characters.

TCP/IP port — Specifies the physical port where the fiscal printer connects to the fiscal manager system.

Group bar: Windows printer settings

You must select Windows Printer from the 'Model' drop-down list to activate this group bar and these options.

Network printer name — Links an Aloha printer definition to a Windows printer definition, enabling any item that prints in the FOH to also print to a printer previously set up in the Microsoft® Windows® operating system. It is very important that the printer name entered here matches the printer name assigned in Windows under Start > Settings > Printers and Faxes. Type a maximum of

100 characters. **Required Options:** You must select Windows Printer as the 'Windows printer type' to activate this option. **Related Requirements:** 'Network printer name' works only if you install the drivers for the Windows printer on the FOH terminal.

 **Tip**

For Windows NT® (local printers), type the printer name here as entered under Printers in Windows. For example: If the Windows printer is called HP LaserJet Plus, then the 'Network printer name' must be HP LaserJet Plus. On Windows NT systems (network printers), the printer name includes the server name. In this case, the 'Network printer name' option must contain the path. For example, if the printer name on an NT system is HP LaserJet Plus on Server01, the name should be \\Server01\HP LaserJet Plus.

Windows printer type — Determines the printer model being used as a Windows printer. **Related Options:** Selecting Windows Printer from the drop-down list activates the 'Windows printer options' group bar.

Maximum number of characters for the QR Code on the guest check — Specifies the maximum number of characters of the QR code allowed to print on the guest check. **Required Options:** You must select 'Print large QR Code on check' in Maintenance > Business > Check Printing group to expose this option. **Documented Version:** v19.9.

Group bar: Windows printer options

This group bar and related options appear only when you select Windows Printer from the 'Model' drop-down list under the 'Windows printer settings' group bar.

Left margin in millimeters — Specifies the left margin of the page, for printing purposes. This option has a maximum value of 65535.

Right margin in millimeters — Specifies the right margin of the page, for printing purposes.

Top margin in millimeters — Specifies the top margin of the page, for printing purposes. This option has a maximum value of 65535.

Bottom margin in millimeters — Specifies the bottom margin of the page, for printing purposes. This option has a maximum value of 65535.

Number of columns — Specifies the number of columns to print on a page. This option has a maximum value of 999.

Space between columns in millimeters — Specifies how much space to put between columns on a page. This option has a maximum value of 65535.

Font settings — Stipulates the font style and size to print. To modify font settings, click the ellipsis (...) to display the Font dialog box into which you make your selections.

Group bar: Windows printer settings

This group bar and related options appear only when you select Aloha Kitchen as the application and Windows Printer from the 'Model' drop-down list under the 'Settings' group bar.

Printer name — Uniquely identifies the printer. **Documented Version:** AK v19.3.

Font name — Specifies the font to use instead of the default font for chit printing. **Documented Version:** AK v19.3.

Font size (very small) — Specifies the font size to use for very small printing. The default is 5 points. **Required Options:** This option overrides the default font size used for the 'Very small' choice for 'Size' on the Design tab in the Print Designer function. **Documented Version:** AK v19.3.

Font size (small) — Specifies the font size to use for small printing. The default is 7 points. **Required Options:** This option overrides the default font size used for the 'Small' choice for 'Size' on the Design tab in the Print Designer function. **Documented Version:** AK v19.3.

Font size (medium) — Specifies the font size to use for medium printing. The default is 10 points. **Required Options:** This option overrides the default font size used for the 'Medium' choice for 'Size' on the Design tab in the Print Designer function. **Documented Version:** AK v19.3.

Font size (large) — Specifies the font size to use for large printing. The default is 13 points. **Required Options:** This option overrides the default font size used for the 'Large' choice for 'Size' on the Design tab in the Print Designer function. **Documented Version:** AK v19.3.

Font size (very large) — Specifies the font size to use for very large printing. The default is 15 points. **Required Options:** This option overrides the default font size used for the 'Very large' choice for 'Size' on the Design tab in the Print Designer function. **Documented Version:** AK v19.3.

Options tab

The Options tab provides configuration that relates more to the restaurant environment, such as transfer and timeout functions. The application you choose when you create the record determines the options available on this tab and this tab does not appear at all when you select Aloha Takeout as the application.

Group bar: Option settings

In kitchen — Items routed to a printer group that includes an 'In Kitchen' selection also print at the expeditor printer. Using this method, only the orders that are 'split' to multiple printer groups print to the expeditor printer for quality control. This method eliminates the requirement to include the expeditor printer in printer groups. **Required Options:** You must access Maintenance > Business > Store > Store Settings tab > Chit Printing group and specify the 'Expediter printer' under the 'Content' group bar.

Reroute timeout seconds — Specifies the amount of time, in seconds, the system waits before rerouting the print job from the defined printer to the backup printer defined on the Printer tab. Valid entries range from 0 to 65535.

Beeps — Sets the number of audible signals emitted by the printer each time a chit prints. This feature is only available on some printer models. Some printers use an annunciator connected to the cash drawer port on the printer to create the beep sounds. Consult the manufacturer of your printer for more information. Valid entries range from 0 to 99. In all cases, the beeps operate using the same signal that opens a cash drawer. If a cash drawer is attached to the printer, verify this option is set to '0' to prevent the cash drawer from opening each time a chit prints.

Number of guest checks — Specifies the number of guest checks to print. Valid entries range from 1 to 99.

Communicate to external device — Allows a designated printer to communicate with an external device, such as a sales recording module (SRM), for fiscal purposes. **Documented Version:** v12.3.

Group bar: Chit printing

Print item prices — Prints item prices on the chit.

Print order total — Prints the order total on the chit.

Print terminal name — Prints the name by which the order terminal is identified in the system on the chit.

Never print delivery/carryout information — Prevents the system from printing delivery or carryout information on the chit.

Never print seat information — Prevents the system from printing seat information on the chit.

Always sort by seat number — Enables the system to sort chit information by seat number, when seat numbering is in use.

```
*****Seat 1*****  
Steak  
Salad  
*****Seat 2*****  
Fish  
Salad
```

Toggle item chit names on the FOH — Enables the printer to toggle between 'Chit name' and 'Chit name alternate' on FOH video devices.

Default item chit name — Specifies whether the default is 'Chit name,' 'Chit name alternate,' or 'Both.'

Group bar: Chit settings

Chit type — Indicates if the chit type is ‘Standard,’ ‘Single-item,’ or ‘Both.’

Standard — Prints the standard Aloha chit with a summary of all items for the order, followed by a full cut.

Single-item — Prints a chit for each item ordered, followed by a half cut.

Printer Name Support up to 30 Character waiter name date time table: 1 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 4.50 Cheeseburger TOTAL: \$50.31 Order Mode < Partial Cut >	Printer Name Support up to 30 Character waiter name date time table: 2 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 4.50 Cheeseburger TOTAL: \$50.31 Order Mode < Partial Cut >	Printer Name Support up to 30 Character waiter name date time table: 3 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut >	Printer Name Support up to 30 Character waiter name date time table: 4 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut >	Printer Name Support up to 30 Character waiter name date time table: 5 of 5 Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut >
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Figure 4 - 7 Single Chit Printing

Both — Prints the standard Aloha chit with a summary of all items for the order, followed by a full cut, and a chit for each item ordered, followed by a half cut.

Printer Name date time waiter name: 1 of 1 table: Order Mode: Guests: Check: 12345 Order Mode 2 9.00 Cheeseburger 3 21.00 Snapper TOTAL: \$50.48 Order Mode < Full Cut >	Printer Name Support up to 30 Character date time waiter name: 1 of 5 table: Order Mode: Guests: Check: 12345 Order Mode 1 4.50 Cheeseburger TOTAL: \$50.31 Order Mode < Partial Cut >	Printer Name Support up to 30 Character date time waiter name: 2 of 5 table: Order Mode: Guests: Check: 12345 Order Mode 1 4.50 Cheeseburger TOTAL: \$50.31 Order Mode < Partial Cut >	Printer Name Support up to 30 Character date time waiter name: 3 of 5 table: Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut >	Printer Name Support up to 30 Character date time waiter name: 4 of 5 table: Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut >	Printer Name Support up to 30 Character date time waiter name: 5 of 5 table: Order Mode: Guests: Check: 12345 Order Mode 1 7.00 Snapper TOTAL: \$50.31 Order Mode < Partial Cut >
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Figure 4 - 8 Summary and Single Chit Printing

Consolidate items with different modifiers — Prints like items on the chit even if the modifiers are not the same. **Required Options: 1)** You must select ‘Single-Item’ or ‘Both’ in ‘Chit type’ to enable this option.

Consolidate only parent items with identical modifiers — Prints identical items with the same modifiers and modifier codes, on the same chit. If the items are not the same or have mixed modifiers, the items print on individual chits using single-chit printing rules. **Required Options: 1)** You must select ‘Single-Item’ or ‘Both’ in ‘Chit type’ to enable this option. **2)** You must clear ‘Consolidate items with different modifiers’ to enable this option. **3)** You must specify the minimum number of items in ‘Consolidate if printing more items than ____.’ **Related Options:** If you access Maintenance >

Menu > Items > Print tab and select 'Independent mod parent print behavior' for a modifier under the 'Chit printing' group bar, the system does not consolidate items and prints on an individual chit using single-chit printing rules. **Documented Version:** v12.3.

Consolidate if printing more items than — Specifies the minimum number of identical items with the same modifiers and modifier codes, before the system prints in consolidation on the same chit. Valid entries range from 2 to 999, with 2 being the default. **Required Options:** You must select 'Consolidate only parent items with identical modifiers' to enable this option. **Documented Version:** v12.3.

Continue chit numbering for add-on items — Includes any add-on orders in the chit numbering of the original order when using single-chit printing. For example, if the first chit is numbered 1 of 2 for order #100, and the second chit is numbered 2 of 2, adding an item to order #100 inherits the chit numbering and prints as 3 of 3. **Required Options:** You must select 'Single-item' or 'Both' from 'Chit type' to enable this option.

Text for add-on items — Specifies the text to print at the top of the chit when you add items to an existing order after the initial print. This allows you to quickly identify the items as part of another order. **Required Options:** You must select 'Continue chit numbering for add-on items' to enable this option. **Default Text:** **ADD ON**. **Documented Version:** v12.3.

Additional text to print on single-item chits — Prints additional text, up to 30 characters, at the top of the chit. **Required Options:** You must select 'Single-Item' or 'Both' in 'Chit type' to enable this option.

Category to combine on single final chit — Specifies the category of items to combine and print together on the final single chit for single-chit configurations. **Required Options:** You must select 'Single-item' or 'Both' in 'Chit type' to enable this option.

Printer Groups tab

The Printer Groups tab is available only for printers controlled by the Aloha Point-of-Sale application. This tab enables you to assign one or more printer groups to a printer. To assign a printer group to a printer, you must already have the printer group configured in the system. You configure printer groups in Maintenance > Hardware > Printer Groups. The printer groups that currently exist in the database appear in the 'Available' list. The printer groups currently assigned to the printer appear in the 'Included' list. Use the >> and << arrows to move printer groups between the 'Available' and 'Included' lists. The column headings that appear in the 'Available' and 'Included' lists are as follows:

Number — Indicates the number of the printer group record.

Name — Identifies the printer group.

Label Print Categories tab

The Label Print Categories tab is available only for label printers controlled by the Aloha Takeout application. This tab enables you to route the printing of a label for specific categories of items to this printer. To assign a category to a printer, you must already have the category configured in the system. You configure categories in Maintenance > System Settings > Categories. The categories that currently exist in the database appear in the 'Available' list. The categories currently assigned to the printer appear in the 'Included' list.

You typically do not print a label for every item. For example, beverage cans and sauce cups usually do not require a printed label; however, entrées and other kitchen produced items require a label. Create a 'General' category that consists of items that require a printed label, using the following guidelines:

- If all items requiring a printed label print to a single label printer, you only need one category.
- Similar to kitchen printing, sites using multiple label printers should create a category for each location in which a label printer resides and items are produced.
- If you use multiple label printers, type a logical name for each category you create for label printing, such as "Grill Label," "Pizza Label," or "Salad Label," to help with configuration.
- You can route categories of items to more than one label printer, if desired.
- Use the >> and << arrows to move categories between the 'Available' list and the 'Included' list. The column headings that appear in the 'Available' and 'Included' lists are as follows:

Number — Indicates the number of the category record.

Name — Identifies the category.

Promotions

Select **Maintenance > Payments > Promotions** to access this function.

Promotions is a comprehensive feature set that allows the configuration of a wide array of promotions to fit every need. There are many different promotion types. You define each one in a separate secondary dialog box specific to the type. Promotions are created in conjunction with the categories defined in Maintenance > Menu > Categories. You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels, to add promotion buttons on panels for display on the FOH terminals.

Categories are the cornerstone in the promotions structure, and you need a full understanding of them to get the most from the promotions features. Promotions are defined in terms of categories, and depending on the needs of the restaurant, you may need to create special 'general categories to use with promotions. For example, a rib dinner normally sells for \$8.99, but using a coupon, a discount of \$2.00 can be applied. Items can only belong to one sales category, and if the rib dinner is already included in a sales category, we recommend that you create a general category that includes only the rib dinner. Select this category when configuring the promotion, thereby, limiting the promotion to only the rib dinner.

Promotion quick tips:

There are several rules to follow when you add and maintain taxes in the system:

- Promotion numbers range from 1 to 30,000.
- If you click New, the system defaults to the first promotion type in the list, Click the New drop-down arrow to select a promotion type. If you click New for each subsequent record you add, the system assigns the same promotion type as the previous record.

Promotion types

There are several promotion types to choose from, when you decide to offer promotions at your restaurant.

BOGO (Buy One Get One) allows a customer to buy an eligible item and receive another item at a discount or free of charge.

Combo combines menu items and assigns a special price.

Coupon assigns coupon characteristics to a promotion and defines a coupon.

New Price assigns a special promotional price to a menu item without affecting prices elsewhere in the Aloha menu system.

New Price Aloha Loyalty defines the promotion as a real-time promotion for use with the Aloha Loyalty rewards program. This promotion type disables most of the options and tabs available on the Promotions function screen.

Check Reduction permits a simple check reduction with either percentage or dollar amount discounts.

Quick Combo QS enables a combination of items to be grouped together for a special price. Most quick combos include a main entrée, such as a burger or sandwich, a side dish, and a drink. The main entrée is typically the primary item that motivates the guest in deciding whether to order the quick combo promotion at a reduced price or as a single item. For this reason, the system provides the ability to quickly build a quick combo based on the primary item of the promotion, and if the guest changes their mind, the system can 'break' the quick combo and return to the primary item. Using this method, employees can easily support the flow of conversational ordering in a quick service environment.

Group Combo allows you to group one or more items or combos for a special price or reward. For example, a dozen assorted donuts has a group price. You can then select 12 individual assorted donuts which can then roll up into a group of one dozen assorted donuts. This satisfies the requirements of a group combo for a \$1.00 discount on a cup of coffee with the purchase of a dozen assorted donuts. You use 'Auto-apply' to automate the process.

Package Promo calculates the total amount of the guest check by applying the base price per guest by the total number of guests in the party, rather than discount the total amount the guest must pay on a guest check. They also determine the items to add to the guest check, and how many of each, based on the guest count.

Promotion tab

Use the Promotion tab to define the dates of the promotion and the type of the promotion, bar code range values, validation options, and more. Click the New drop-down arrow to select a promotion type. If you click New for each subsequent record you add, the system assigns the same promotion type as the previously added record. (If you click New first, the system defaults to the first promotion type in the list.)

The Bar Code Range options enable you to use bar codes with your promotions, specifically printed coupons, and assist you with looking up the promotion. The Bar Code Range options allow you to apply the promotion to the guest check very quickly. Use bar code range values to establish a valid range of SKU numbers for the promotion. For example, you can set up a range of coupons with the same restrictions and reductions to apply to the check. The coupon must have a SKU number and bar code label and the lowest and highest values must have the same number of digits. **Required Options:** To use bar code scanners, access Maintenance > Hardware > Terminals > Readers tab and select 'Use bar code reader' under the 'Bar code reader' group bar for the terminal with the scanner. **Related Options:** When scanning promotions with a bar code reader, the system reads the SKU number in Maintenance > Menu > Items first, then the promotion SKU number.

Use the Validation options to check the validation code of the promotion and whether you can enter numeric entries only. You cannot use this feature with a quick combo promotion, or any promotion in which you enable the 'Auto-apply' option.

Group bar: Settings

Name — Identifies the promotion. Type a maximum of 20 characters.

Type — Specifies the promotion type. This option is 'read only.' Click the New drop-down arrow to select a promotion type. See "Promotion types" for more information.

Active — Indicates the promotion is available for use at a store. You can also use Events to activate a promotion. Any event you create override this option.

Start date — Specifies the day the promotion begins. Type the date in mm/dd/yy format, or select the date from the calendar.

End date — Specifies the day the promotion ends. Type the date in mm/dd/yy format, or select the date from the calendar. An error message appears if the end date is not greater or equal to the start date.

Allow price change to override — Enables each store to change the price of the promotion using the Price Changes function. If you clear this option, store-level operators can view the price, but they cannot change the price. This check box is available at the 'corporate level' only.

Maximum amount — Defines the maximum amount of discount allowable per check.

Panel sort order — Indicates where on a panel the promotion is placed. A value of '0' means the promotion does not get sorted. The highest value is placed last on the panel. Valid entries range from 0 to 9999.

Report as — Specifies the promotion under which you want to report sales applied with this promotion.



Tip

To report a promotion as itself, select Default from the 'Report as' drop-down list.

Print check on close — Prints a copy of the guest check immediately after tendering and closing the check, for the guest to view. In a table-service environment, we recommend you clear this option as the guest leaves the restaurant before the last and final closing of the check.

Manager required — Requires a manager to apply the promotion. **Related Options:** This option is overridden if you select 'Auto Apply' in the Type Specifics configuration for the promotion.

Do not show in promo lookup list — Designates the promo is not to appear in the promo dialog box.

Include discount amount in gratuity calculation — Enables the system to apply a gratuity to the guest check, after adding the selected promotion to the check.

Do not report as discount — Determines if the price differential between an item when sold as a promotion versus when sold a la carte reports as a discount. For example, you sell a single taco for \$2.00. If you sell 12 tacos a la carte, the total comes to \$24.00; however, you offer a group combo

of 12 tacos for \$12.00. When selected, the system recognizes the group price as the price of the item and does not report the price differential of \$1.00 per taco as a discount. When cleared, the system recognizes the group price as the price of the item and the price differential of \$1.00 per taco reports as a discount. **Required Options:** You must select Quick Combo QS or Group Combo as the promotion type to enable this option. **Documented Version:** v12.3.

Export ID — Designates a unique code for each promotion to enable exporting to third-party software application interfaces.

If non-taxable exclude from discount — Excludes the price of any item in the quick combo sold as non-taxable, when calculating the quick combo discount distribution for reporting purposes. **Related Options:** Selecting this option exposes 'Apply indicator for tax free item.' **Related Requirements:** Access Maintenance > System Settings > Order Mode and select 'Non-taxable except' under the 'Tax selections' group bar to designate an order mode as non-taxable. Selecting this option exposes 'Category,' which allows you to designate the category containing items that are taxable when an order is applied to the order mode. **Documented Version:** v19.3.

Apply indicator for tax free item — Includes an asterisk on the guest check next to any item in the quick combo sold as non-taxable. **Related Options:** You must select 'If non-taxable exclude from discount' to enable this option. **Documented Version:** v19.3.

Group bar: Bar code range

Lowest — Establishes the lowest number in a range to support a bar code scan for the promotion.

Highest — Establishes the highest number in a range to support a bar code scan for the promotion.

Group bar: Validation

This group bar does not appear for promotion types Quick Combo, Group Combo, Package Promo, and New Price Aloha Loyalty.

Prompt for validation code — Requires you to enter a validation code for the promotion.

Numeric only — Requires you to enter only numeric values for the validation code. **Required Options:** You must select 'Prompt for validation code' to enable this option.

Restrict length — Indicates to limit the length of text an employee can enter for the validation code. **Required Options:** You must select 'Prompt for validation code' to enable this option.

Length — Specifies exact length of text you can enter for the validation code. **Related Options:** You must select 'Restrict length' to enable this option.

Group bar: Kitchen (available for only Quick Combo and Group Combo promotions)

Quick Combo expo display type — Specifies how to display combo orders on kitchen screens. You can select from 'Default,' 'Group on expo,' 'Group and display name on expo,' 'Group on all,' or 'Group and display name on all.'

New Price tab

This tab appears only for the 'New Price' promotion.

Base discount category — Specifies the category of items from which a guest must make a purchase to qualify for the New Price promotion. **Related Options:** This option enables the 'Base discount category's new price' option.

Base discount category's new price — Specifies the price to apply to any item selected from the base discount category, **Required Options:** You must select a 'Base discount category' to enable this option.

Maximum items eligible for new price — Allows you to specify a maximum number of items in the category that are eligible for this promotion.

Auto-apply — Applies the discount automatically to eligible items without requiring employee input.

Taxes tab

The system provides multiple tax options to ensure restaurants comply with various laws regarding the handling of taxes for promotions. Based on the tax jurisdiction, some tax laws may require some restaurants to pay the tax on all promotions and comps, while other restaurants pass the tax on to customers.

You can apply primary, secondary, or vendor taxes to promotions. And you can specify if you want to apply taxes to the full amount of sale, before you apply the promotion.

Guest pays tax — Requires the guest to pay the tax on the promotion. If cleared, the restaurant pays the tax.

Group bar: Primary taxes

Apply tax to discount amount — Calculates the primary tax on the ala carte price of the items in the promotion, not the discounted price.

Apply tax on food cost only — Uses the percentage defined in the 'Food cost %' text box to apply a tax amount on the food cost in the promotion. **Required Options:** You must define a tax percentage in 'Food cost %.'

Food cost % — Defines a tax percentage (entered as a decimal), to use when calculating tax based on the cost of an item. Valid entries range from 0.0 to 100.00. **Required Options:** You must select 'Apply tax on food cost only' to enable this option. **Related Requirements:** You define food costs in Maintenance > Menu > Item Cost.

Override tax on discount amount — Applies the selected tax type to the promotion, rather than calculating the tax based on the tax defined for each item in the promotion. Some jurisdictions require the restaurant to pay the tax on all promotions. Thus, one way to track promotion tax amounts is to create a special tax type called Promotions/Comps. **Related Requirements:** To define a tax, select Maintenance > Taxes > Tax Type.

Group bar: Secondary taxes

Apply tax to discount amount — Applies a secondary tax to the promotion amount. The system calculates the tax on the original item price before applying the promo.

Group bar: Vendor tax

Apply tax to discount amount — Applies the vendor tax to the full amount of the promotion.

Tax food cost — Uses the percentage defined in the 'Food cost' text box to apply a vendor tax amount on the food cost in the promotion. **Required Options:** You must define a tax percentage in 'Food cost.'

Food cost % — Defines a tax percentage (entered as a decimal), to use to calculate an approximate food cost. Valid entries range from 0.0 to 100.00. **Required Options:** You must select 'Tax food cost' for vendor tax to enable this option.

Group bar: Surcharge

Surcharge discount amount — Applies a tax to the promotion amount. This option is for use with surcharges only.

Restrictions tab

Use the Restrictions tab to define the limitations on the promotion, govern how to handle comp items with the promotion, and how other promotions affect it. This tab is not available if the promotion type is New Price Aloha Loyalty.

Group bar: Promotion restrictions

Allow items discounted by a promotion — Indicates items already defined as promotions are eligible for inclusion in the promotion being defined.

Allow with existing promotions on check — Enables you to apply this promotion to a check if another promotion already exists on the check.

Allow with existing promotions on table — Enables you to apply this promotion to a table if another promotion already exists for the table.

Allow subsequent promotions on check — Enables you to apply another promotion to a check after you apply this promotion to the check.

Allow subsequent promotions on table — Enables you to apply another promotion to a table after you apply this promotion to the table.

Group bar: Comp restrictions

Allow Items discounted by a comp — Allows comp items to be eligible for the promotion. Clear this option if comp items are not permitted.

Allow with existing comps on check — Allows you to apply this promotion to a check if a comp already exists on the check.

Allow with existing comps on table — Enables you to apply this promotion to a table if a comp already exists for the table.

Allow subsequent comps on check — Enables you to apply a comp to a check after you apply the current promotion to the check.

Allow subsequent comps on table — Enables you to apply a comp to a table after you apply the current promotion to the table.

Group bar: Maximum

Per check — Defines the maximum allowable number of promotions permitted on each guest check. Attempts to apply more promotions than the number specified here result in a warning message on the order entry terminal. Valid entries range from 1 to 99.

Token Distribution tab

Use the Token Distribution tab to allow the specific promotion to override the calculation distribution of tokens when interfacing with a token distribution system. Select the Token Distribution tab from the Promotions function. **Required Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display token distribution' under the 'Options to display' group bar to expose this tab.

Group bar: Token Settings

Override token calculation — Overrides token distribution calculation by a set quantity.

Method — Indicates the way the system allows a token calculation override. **Required Options:** You must select 'Package Promo' as your promotion type to enable this option. You must select 'Override token calculation' to enable this option.

Override quantity — Specifies the number of tokens to dispense when you apply the promotion.

Item level override — Enables you to distribute tokens by the number of guests in the promotion; otherwise, all tokens are dispensed as one batch.

Quantity — Specifies the number of tokens to dispense when you apply the promotion. **Required Options:** If your promotion type is 'Package Promo,' you must select 'Override quantity' as your 'Method' to enable this option.

Pause based on group size — Enables the dispenser to pause between guests so the next guest has time to place their cup under the opening. **Required Options:** You must select 'Item level override' as your 'Method' to enable this option.

Promotion Type Tabs

Each promotion type has one or more type-specific tabs you must complete to set up the promotion. In addition to the general tabs you complete for every promotion, complete the following tabs, based on the type of promotion you create:

BOGO Promotion

- BOGO tab
- Requirements tab

Check Reduction Promotion

- Check Reduction tab

Combo Promotion

- Combo tab
- Components tab

Coupon Promotion

- Coupon tab
- Requirements tab

New Price Promotion

- New Price tab
- Requirements tab

Package Promotion

- Component tab
- Package Promo Matrix tab

Quick Combo Promotion

- Quick Combo tab
- Components tab

BOGO tab

Use the BOGO (Buy One Get One) promotion type to configure a buy one get one of equal or lesser value, either free or at a discounted price. Chargeable modifiers are included in the calculated cost when determining the lower priced item. For example, buy two large sandwiches at regular price, and receive a small sandwich at the discounted price of \$0.99.

Group bar: Buy one get one

Discount item restriction — Defines the behavior to use when determining which eligible items to discount with a BOGO promotion. **Required Options:** You must select BOGO as the promotion type to enable the BOGO tab. **Documented Version:** v12.3.

None — Does not place an item restriction.

Equal or lesser — Applies the promotion to only items whose price is equal to or less than the price of the qualifying item. If more than one eligible item is on the check, the system uses the highest priced qualifying item.

Equal or higher — Applies the promotion to only items whose price is equal to or more than the price of the qualifying item. If more than one eligible item is on the check, the system selects the highest priced qualifying item.

Lowest — Applies the promotion to items whose price is equal to or less than the price of the qualifying item. If more than one eligible item is on the check, the system selects the lowest priced item.

Price of discounted item — Indicates how to apply price to the promotion item.

Free — Indicates the second item is sold at no price.

Fixed price — Indicates the second item is sold at a discounted fixed price.

Percent off — Indicates the second item is sold at a discounted fixed percentage of its original price.

Price — Indicates the specific amount to charge for the promotion item. **Required Options:** You must select 'Fixed price' from 'Price for discounted item' to enable this option.

Percent off — Indicates the percentage to take off the cost of the promotion item. Valid entries range from 0.00 to 100.00. Enter the percentage as a number and two decimal places. For example, a percentage of 50% is entered as 50.00. **Required Options:** You must select 'Percent off' from 'Price of discounted item' to enable this option.

Auto-apply — Applies the BOGO to all eligible items on the check and suppresses the FOH Select Items prompt. **Related Options: 1)** This option disables the 'Per check' and 'Per table' options in Maintenance > Payments > Promotions > Restrictions tab. **2)** This option overrides the 'Manager required' option in Maintenance > Payments > Promotions > Promotion tab.

Check Reduction tab

Use the Check Reduction promotion to discount the guest check either by a percentage or a dollar amount. You can place restrictions on the promotion, such as a minimum amount for the guest check. For example, the guest check total must be at least \$50.00 for the customer to receive a 10% discount. You can also restrict the discount to items from a specific category, or it can apply to all items on the guest check.

Check minimum — Specifies the minimum amount for the guest check before you can apply the Check Reduction promotion. **Related Options:** If you select 'Check minimum qualification' and a 'Qualifying Items' category, the 'Check minimum' amount pertains to the total value of the items ordered from that category. This total must be greater than the amount specified in 'Check minimum' before you can apply the promotion to items purchased from the category specified in 'Items.'

Check minimum qualification — Works in conjunction with the two options below and the 'Check Minimum' text box to place a restriction on the promotion. **Related Options:** You can apply the promotion if the item total is less than the amount specified in 'Check minimum.'

Select items that do not apply to check minimum — Specifies the category to exclude when determining if the promotion is still valid. **Required Options:** You must select 'Check minimum qualification' to enable this option.

Select items that apply to check minimum — Specifies the category to include when determining if the promotion is still valid. **Required Options:** You must select 'Check minimum qualification' to enable this option.

Items that apply to check minimum — Specifies the category containing the items that are discounted when you apply the promotion. **Required Options:** You must select 'Select items that apply to check minimum' under the 'Check minimum qualification' option to enable this option.

Items that do not apply to check minimum — Specifies the category containing the items that are not discounted when you apply the promotion. **Required Options:** You must select 'Select items that do not apply to check minimum' under the 'Check minimum qualification' option to enable this option.

Eligible items for discount — Specifies the category containing the items that are discounted when the promotion is applied.

Method — Determines whether the promotion applies a percentage amount or a fixed amount.

Amount — Treats the value as a dollar amount for fixed value coupons.

Percent — Reduces the check by a percentage. Enter the percentage in the 'Amount' text box.

Amount — Specifies the check reduction amount. **Required Options:** You must select 'Amount' under the 'Method' option to enable this option.

Percent off — Specifies the check reduction percentage. Enter the percentage as a whole number and two decimal places. For example, a percentage of 50% is entered as 50.00, and 100% is 100.00. **Required Options:** You must select 'Percent' under the 'Method' option to enable this option.

Auto-apply — Applies the check reduction to all eligible items on the check and suppresses the display of the FOH Select Items prompt. **Related Options: 1)** This option disables the 'Per check' option in Maintenance > Payments > Promotions > Restrictions tab. **2)** This option overrides the 'Manager required' option in Maintenance > Payments > Promotions > Promotion tab.

Combo tab

Use the Combo promotion to combine items from up to 10 categories and assign a special reduced price to the combination of items. For example, if the individual price for the sandwich category is \$2.99, the sides category \$1.99, and the drink category is \$1.29, the order total would be \$6.27. A combo could be created that allows the customer to order an item from each of these categories for a special reduced price of \$5.00. Upon closing the check, the server selects the Combo button, and the system automatically verifies the presence of qualifying menu items on the guest check and applies the combo price.

Note

The price of the combo promotion must be less than the total price of the combined items for the combo to be applied.

Combo check name — Specifies the name of the combo to appear on the guest check.

Price — Sets the reduced special price of the combo.

Eligible modifiers for discount — Specifies the category from which chargeable modifiers are free when you apply the combo.

Auto-apply — Applies the discount automatically to eligible items without requiring cashier input.

Requirements tab

The Requirements tab is available for BOGO, Coupon, and New Price promotions.

Group bar: Items

Use the Items section to associate items to your promotions. Click **Add**, and a new grid row appears towards the bottom of the Items grid. Complete the following options for each item row you add:

Name — Identifies an eligible item. **Related Options:** You must select BOGO to enable this option.

Required number of items — Specifies the required number of items needed for the promotion to take effect. **Related Options:** You must select BOGO to enable this option.

Required items for discount — Specifies a specific category from which the selected item must come for the promotion to take effect. **Related Options:** Selecting this option in 'Coupon' promotion or 'New Price' promotion enables the 'Minimum items required' option.

Minimum items required — Specifies the minimum number of items required for the promotion to take effect. **Related Options:** You must select Coupon, or New Price for this option to appear. You must select 'Required items for discount' to enable this option.

Group bar: Combos

Use the >> and << arrows to move items between the 'Available' list and the 'Included' list.

The column headings that appear in the 'Available' list are as follows:

Number — Indicates the unique number assigned to the combo.

Name — Identifies the long name assigned to the combo.

The column headings that appear in the 'Included' list are as follows:

Number — Indicates the unique number assigned to the combo.

Name — Identifies the long name assigned to the combo.

Components tab

Use the Components tab to specify the items eligible to become part of the combo, the category which includes each item, and the minimum and maximum number of items an employee can order from the selected category.

Group bar: Components

When specifying categories and items included in the combo, you must click Add to display a row, If you no longer want to include a category in the selected combo promotion, select the appropriate row, then click Remove to delete the row. You define categories in Maintenance > Menu > Categories.

Name — Identifies an eligible item. **Related Requirements:** The item must be included in the selected category.

Category — Specifies up to 10 categories you can include in the combo promotion.

Minimum — Determines the minimum number of items you can order from the selected category. Valid entries range from 0 to 99.

Maximum — Determines the maximum number of items you can order from the selected category. There is no additional charge for the items over the minimum limit. Valid entries range from 1 to 99.

Group bar: Combos

Use the >> and << arrows to move items between the 'Available' list and the 'Included' list. The column headings that appear in the 'Available' list are as follows:

Number — Indicates the unique number assigned to the item.

Name — Indicates the long name assigned to the item.

The column headings that appear in the 'Included' list are as follows:

Number — Indicates the unique number assigned to the item.

Name — Indicates the long name assigned to the item.

Component tab (Package Promotion)

Use Package Promotions to calculate the total amount of the guest check by applying the base price per guest by the total number of guests in the party, rather than discount the total amount the guest must pay on a guest check. You can also determine the items to add to the guest check, and how many of each, based on the guest count.

The Component tab enables you to define price and component information about the package promotion.

Default price per person — Specifies the base price of the promotion. For a discount, the base price X guest is less than the total price of all components combined. For a gain, the base price X guest is more than the total price of all components combined.

Group size minimum — Specifies the minimum number of guests needed, to use the promotion. This option has a minimum value of 1.

Group size maximum — Specifies the maximum number of guests allowed, to use the promotion. This option has a maximum value of 999. The value for this option must be greater than the value for 'Group size minimum.

Number of components — Specifies the number of components to use for the promotion. This number should be equal to the number of items included in the promotion. Valid entries range from 0 to 10. For example, if this promotion includes pizza, a drink, a dessert, and tokens, type 4. **Related Options:** Typing a value for this option inserts that many rows into the 'Components' grid.

Group bar: Components

Enables you to select each item to include in the promotion. The number of rows that appears is equal to the value for 'Number of components.' Complete the following options for each component:

Number — Indicates the line item number.

Component — Indicates the item you want to include as a component for the package promo. Only items of 'standard' type appear for selection.

Free Modifiers — Specifies a modifier group of modifiers for the corresponding item in which the modifiers are not charged when you select them in the FOH. This list displays the modifier groups attached to the corresponding item. 'None' indicates there are no modifier groups attached to the item.

Exclude from discount — Indicates you want to exclude the item from the discount or gain calculation. To clear an excluded item, select the item again. **Related Options:** When selected, this option disables the 'Sequence' option.

Sequence — Indicates the sequential order number in which you want the component to absorb the full possible amount of the promotional discount. After applying the amount, if there is a remaining discount, the next sequential order number absorbs the fullest possible amount. If you set the promotion to show a gain and any component has a 'Sequence' value greater than zero, the full value of the gain is allocated to the lowest numbered component. **Required Options:** You must clear 'Exclude' to enable this option.

Components QS tab (Quick Combo Promotion)

The Components QS tab, which is for Quick Service environments, enables you to add one or more components to the quick combo promotion, and select items for each component. When you add a component, a component row appears at the top of the tab, for you to name the component. Additionally, options appear at the bottom of the tab for you to select and configure the items for the selected component.



Note

The options that appear at the bottom of the Quick Combo tab change dynamically, per the component row you select at the top of the tab. For example, if you have the first component row selected at the top of the tab, the options that appear under the 'Items' group bar correspond to the first component row.

Group bar: Components

Use the 'Components' group bar to add components to your quick combo. You can add a maximum of 10 components per quick combo. You must add at least two components before you can save the

record. For example, if your quick combo consists of a sandwich, a side, a drink, and a toy, then you would add four components.

Complete the following options for each component you add:

Name — Identifies the quick combo component, such as sandwich, drink, or any name that is descriptive of the component you want to offer.

Contains pizza halves — Indicates the quick combo promotion allows fractional pizza menu items. A fractional pizza is a pizza that is divided into halves, thirds, or quarters, so that a guest can order more than one pizza menu item per pizza. Select this option only if you allow the guest to order the pizza in fractions. **Documented Version:** v19.6. **Related Options:** When selected, this option enables the 'Pizza halves' feature.

Exclude from item count — Does not include this component in the item count calculation for the check. Use this option for such things as user-defined 'markers,' beverages, and any other items that are non-essential to the item count. **Required Options:** To benefit from this option and enable the system to include components in the item count, you must access Maintenance > Business > Store > Store Settings tab > Check Printing group and select 'Include quick combo components in item count.' **Documented Version:** v12.3.

Exclude from Discount — Indicates you want to exclude the component from the discount calculations. This applies the total discount to only the components not marked with 'Exclude' in the promotion. If the price of the discounted amount is greater than the full price of the components not marked with 'Exclude,' then you cannot apply the promotion.

Exclude from mixed levels determination — Leaves out the component when determining the quick combo level for report. You must have at least one component included in the mixed levels determination. **Required Options: 1)** To enable the quick combo to use mixed levels, select 'Allow components with mixed upsell levels' on the Quick Combo QS tab. **2)** To enter an upcharge for a size surcharge, type an amount in the 'Size surcharge' column, located in the Items section of the Components tab.

Primary component — Specifies the component is a required entry on the order before you can apply the quick combo using the Quick Combo Toggle button function. The primary component is typically the main entrée component upon which the quick combo meal is based. You can designate only one component as the primary. **Related Requirement:** You must access Panel Editor and add the Quick Combo Toggle button function to a panel, to toggle between the primary component and its respective quick combo promotion.

Enable item substitution — Enables you to substitute the component for another eligible item. Eligible items include items in the designated substitution category, as well as the items defined on the Items tab in the quick combo configuration. Selecting this option enables 'Substitution category.'

Substitution category — Designates the category of items to use for item substitution for the corresponding component. All items in the substitution category must also be designated as eligible items for the component on the Items tab of the quick combo or the system ‘breaks’ the quick combo into a la carte pricing. **Required Options:** You must select ‘Enable item substitution’ to enable this option. **Related Requirements:** There are two different implementations for Quick Combo Item Substitutions. **1)** To have the system automatically place the items in the category on a system-generated Quick Combo Substitution screen, you must create a blank panel in Screen Designer and then select that panel from the ‘Quick combo template’ drop-down list in Maintenance > Business > Store > Store Settings tab > User Interface group > ‘Quick combo’ group bar. **2)** To use a context panel from which to perform item substitution, you must add a Dynamic Substitute button for each eligible item, to a context panel in Panel Editor. Then attach that context panel to the corresponding component in Maintenance > Payments > Promotions > Quick Combo QS > Components QS tab > Substitution category option.

Context option — Specifies whether this component uses the context panel associated with the quick combo, the context panel associated with the specific item, or a custom panel of your choosing. **Required Options: 1)** You must select ‘Display Context Panels’ in Maintenance > Business > Additional Features (Corporate Administration) > ‘Options to display’ group bar to expose options related to context panels. **2)** You must access Maintenance > Business > Store > Store Settings tab > User Interface group and select ‘Uses context panels’ under the ‘POS Order Entry Check’ group bar to activate the context panel functionality. **Related Requirements:** You must access Screen Designer and select ‘Context Panel’ on the Properties dialog box to configure a panel as a context panel.

QC Default — Associates the context panel you specify at the quick combo level in this same function on the Quick combo QS tab.

Item’s context panel — Associates the context panel you specify at the item level.

Custom context panel — Associates a custom panel you design specifically for this component.

Required Options: You must select the custom panel you design from the ‘Custom panels’ drop-down list.

Custom panels — Attaches a custom panel you select from a list of user designed panels. **Required Options:** You must select ‘Custom context panel’ to enable this option.

Group bar: Items

Use the Items section to associate items to your components. You can associate a maximum of 45 items per component. The selections in the Items grid change per the component row you select in the Components grid. Click **Add**, and a new grid row appears towards the bottom of the Quick

Combo tab, to configure the item. For example, if your selected component is a sandwich, you can select up to 45 different sandwiches to include in the quick combo.

 **Tip**

If you installed Aloha Kitchen, an additional option appears for each item you assign to a combo component. 'Highlight' allows you to select the color in which the selected item text appears on screen in the kitchen. This option provides an at a glance reminder that the Quick Combo may contain non-standard items which may or may not count as an upsell.

Complete the following options for each item row you add:

Regular item — Defines the default, standard item for the selected component. For example, if the Sides component is normally a regular order of fries, then select 'Reg Fries' from the drop-down list.

Do not affect size level — Designates the combo level is not to increase in size when a customer orders this component item as part of a combo. This option does not affect any item surcharges incurred on the combo. **Documented Version:** v12.3.

Item highlight — Designates the color to apply to the background (not foreground) of an item cell, overriding the color scheme of the kitchen skin.

Item surcharge — Specifies the additional amount to charge for an item when it is not considered a base item of the quick combo. For example, you can add a \$0.30 item surcharge each time a guest orders a shake in place of the standard drink choice for the quick combo.

Upsell item 1 — Defines the first-level upsell item for the selected component. For example, if you can upsell a combo from a regular to large order of fries, then select 'Large Fries' from the drop-down list.

Item highlight 1 — Designates the color to apply to the background (not foreground) of the upsell item 1 cell, overriding the color scheme of the kitchen skin.

Item surcharge 1 — Specifies the additional amount to charge for the first-level upsell item, if a customer orders an item that is not considered a standard upsell item for the quick combo.

Size surcharge 1 — Specifies the additional amount to charge for the first-level upsell item, if applicable. For example, if you typically charge extra when you upsell a combo to include an large order of fries, type the extra charge amount in this option text box.

Upsell item 2 — Defines the second-level upsell item for the selected component. For example, if you can upsell a combo from a regular to an extra large order of fries, then select 'Extra Large Fries' from the drop-down list.

Item highlight 2 — Designates the color to apply to the background (not foreground) of the upsell item 2 cell, overriding the color scheme of the kitchen skin.

Item surcharge 2 — Specifies the additional amount to charge for the second-level upsell item, if a customer orders an item that is not considered a standard upsell item for the quick combo.

Size surcharge 2 — Specifies the additional amount to charge for the second-level upsell item, if applicable. For example, if you typically charge extra when you upsell a combo to include an extra large order of fries, type the extra charge amount in this option text box.

Group bar: Pizza halves

The 'Pizza halves' group bar appears only for items in the Components group bar for which you selected 'Contains pizza halves.' First select a pizza menu item configured to support pizza fractions, such as 'Fractional Small,' then click Add for each pizza menu item a guest can purchase in fractions for that item.

Regular item — Defines the default, standard item. For example, if you allow guests to purchase a Veggie Lovers Small Pizza in fractions, select this pizza menu item from the drop-down list.

Upsell item 1 — Defines the first-level upsell item for the selected component. For example, if you can upsell a quick combo from a regular to medium pizza halves menu item, then select 'Veggie Lovers Medium Pizza' from the drop-down list.

Upsell item 2 — Defines the second-level upsell item for the selected component. For example, if you can upsell a quick combo from a regular to a large pizza halves menu item, then select 'Veggie Lovers Large Pizza' from the drop-down list.

Coupon tab (Coupon Promotion)

Use the Coupon promotion type to apply a percentage or fixed dollar coupon discount to items from a specific category. You can set restrictions, such as two items must be purchased from a specific category to receive a discount, or you can apply the coupon to only one qualifying item per guest check.

Group bar: Coupon

Method — Indicates how the system calculates the value of the coupon.

Fixed amount — Specifies the coupon discount is a fixed dollar amount.

Fixed percent — Specifies the coupon discount is a percentage.

Prompt for amount — Prompts you to type the discount amount.

Prompt for percent — Prompts you to type the discount percentage.

Item by percent — Determines the maximum discount value of the coupon based on a calculated percentage of a specific item. Use this feature if your store has multiple price markets, to discount an item based on the price of the item at the location from which it is sold. **Related Options:** This option enables the 'Use selected Item as max discount amount' option. **Documented Version:** v15.1.

Use selected Item as max discount amount — Displays a list of items and allows you to attach a specific item to a coupon that uses the 'Item by percent' method. **Required Options:** You must select 'Item by percent' from the 'Method' drop-down list to enable this option. **Documented Version:** v15.1.

Auto-apply if possible — Applies the discount automatically to eligible items without requiring cashier input.

Amount — A dollar amount entered here establishes a maximum amount, to prevent the discount from exceeding a certain amount. For example, if a customer purchases two entrées, they may receive a dessert free. However, if the amount specified is \$3.00, the customer must pay the difference if the price of the dessert is more than \$3.00. **Related Options:** You must select 'Amount' as the Method to enable this option.

Percent off — Treats the value as a percentage for percentage coupons, and as a dollar amount for dollar amount coupons. Enter the percentage as a number and two decimal places. For example, a percentage of 50% is entered as 50.00, and 100% is 100.00. Specify the percentage or fixed dollar amount in the text box. You must select 'Percent off' as the Method to enable this option.

Item selection — Indicates the manner in which items are selected for discount.

System selects all qualified items — Causes the system to select all items from the order that qualify for the promotion. **Related Options:** This option enables the 'Automatically include new items' option.

User selects each qualified item — Requires the person entering the customer order to select the items that qualify for the promotion.

System selects first qualified item — Enables the system to automatically apply a discount to the first qualifying item for a coupon and bypasses the 'Is this correct' confirmation screen. If you apply another coupon to the same check, and there is another qualifying item, the system applies the discount to the next eligible item.

Automatically include new items — Enables the system to automatically recalculate a coupon discount when you add new eligible items to the check. You must apply the coupon again to enable the system to include the new item. **Required Options:** You must select 'System selects all qualified items' to enable this option.

Apply discount amount — Allows you to specify whether to apply the discount 'Once per item' or 'Once per coupon.'

Audit count at checkout — Requires a count of the total number of this type of coupon received, upon checkout.



Reference

Refer to the [Coupon Audit Count Feature Focus Guide - HKS347](#) for more information on reconciling coupons.

Variance quantity allowed — Determines the number you can be over or short from the expected number for this coupon when verifying totals for audit. **Required Options:** You must select 'Audit count at checkout' to enable this option.

Eligibility tab

The Eligibility tab is available for Bogo, Coupon, and New Price promotion types. Use the Eligibility tab to identify and define items and modifiers eligible for discounts.

Eligible items for discount — Select a category of eligible menu items for the discount. **Related Requirements:** You define categories in Maintenance > Menu > Categories. This is mandatory.

Item limit (available for Coupon Promotion only) — Determines the maximum number of eligible items that can be selected at any one time from the FOH selection screen when applying the promotion. If more items are selected than the number specified here, an error message appears.

For example, the promotion states buy any entrée for 10% off. If the guest check has three entrées for \$10.00 each, the discount is calculated based on 10% of \$30.00 and a \$3.00 discount is applied to the check.

If the promotion states buy one entrée and get \$2.00 off, and the guest check has three entrées for \$10.00 each, the discount is applied to each entrée individually, creating three entries on the guest check for \$2.00 each; however, if 'Per Check' is set to 2, the discount can be applied to two entrées only for a maximum discount of \$4.00.

Eligible modifiers for discount — Specifies a category from which chargeable modifiers are free when you apply the promotion.

Items — Specifies an eligible item to receive a new price. **Required Options:** You must select 'New Price' promotion to enable this option.

New Price — Specifies a new price for the selected item. **Required Options:** You must select 'New Price' promotion to enable this option.

Group bar: Combos

Use the >> and << arrows to move items between the 'Available' list and the 'Included' list. The column headings that appear in the 'Available' and 'Included' lists are as follows:

Number — Indicates the unique number assigned to the item.

Name — Indicates the long name assigned to the item.

New Price tab (New Price Promotion)

Use the New Price promotion to assign a special promotional price to menu items without affecting prices elsewhere in the system. For example, an entrée that normally sells for \$12.50 can be purchased for \$9.50 with the New Price promotion. This type of promotion is different in that it sets the price for the item as opposed to calculating a new price based on a percentage or dollar amount discount. It is also different in that specific items eligible for discount are defined instead of allowing the discount to be applied to any item in a specific category.

You can place restrictions on the promotion. For example, the customer may have to purchase two entrées to receive a dessert that normally sells for \$5.50 at a discounted price of \$4.00

Base discount category — Specifies the category of items to include in the New Price promotion. **Required Options:** You must select 'New Price' from the New list box to enable this option. **Related Options:** This option enables the 'Base discount category's new price' option.

Base discount category's new price — Specifies the price to apply to promotion items included on a guest check. **Required Options:** You must select a 'Base discount category' to enable this option.

Maximum items eligible for new price — Sets the number of promo types you can apply to the same guest check. For example, if you type one, you can only apply one instance of the New Price promotion and no other promotion type.

Auto apply — Applies the New Price promotion to all eligible items on the check and suppresses the FOH Select Items prompt from displaying. **Related Options: 1)** This option disables the 'Per Check' and 'Per Table' options in Maintenance > Payments > Promotions > Restrictions tab. **2)** This option overrides the 'Manager Needed' option in Maintenance > Payments > Promotions > Promotion tab.

Package Promo Matrix tab

The system generates line items under the 'Size' and 'Price' columns on the Matrix tab, based on the 'Group size maximum' and the 'Default price per person,' incrementing by one. The Matrix tab enables you to override the calculations in each column, except for the Size column. Vertical and horizontal scroll bars display on the bottom and side to display all the columns and rows.

Group bar: Default price per person

Default price per person — Indicates the base price of the promotion per guest.

Group bar: Matrix

Matrix grid — The Matrix grid enables you to override price and quantity for the individual promotion components in a package promo.

To override a price, click inside a value of the Price column and type the new price. Do this in situations where you want to offer a price break if the party reaches a certain number of guests. For example, if the calculated price for 10 guests is \$79.90, you could type a new price of \$75.00 in the Price column to override the calculated price.

To override the quantity of a component, click inside the value of any of the other columns, excluding Size, and type the new value. Do this in situations where you want to control accurate food and token servings. For example, if a whole pizza serves six guests, then you would type 1 in the 'pizza' column, up to the size of six guests. After the sixth guest, you would type 2 in the 'pizza' column, up to the number of guests required for a third pizza.

Quick Combo QS tab

Use the Quick Combo promotion type to group a combination of items together for sale at a special price. You can combine up to ten items. For example, you might group together a burger, fries, and a drink, and then assign the group, or combo, a discounted price.

Group bar: Quick Combo QS

Regular name — Identifies the quick combo on the on-screen guest check when the system auto-applies the quick combo. Type a maximum of 25 characters.

Regular price — Specifies the base price of the quick combo without an upsell charge. The system validates if the price is lower than the total of each item included in the quick combo if it were priced separately. Duplicate Help ID

Upsell name #1 — Specifies the description for the upsell level, such as 'Biggie Size.' The Upsell number corresponds to the number selected in 'Upsell.' Type a maximum of 25 characters.

Upsell price #1 — Specifies the additional price for the upsell level, on top of the previous level.
Related Options: This option corresponds to the 'Upsell name #1' option.

Upsell name #2 — Specifies the description for the upsell level, such as 'SuperBiggie Size.' The Upsell number corresponds to the number selected in 'Upsell.' Type a maximum of 25 characters.

Upsell price #2 — Specifies the additional price for the upsell level, on top of the previous level.
Related Options: This option corresponds to the 'Upsell name #1' option.

Show upsell as modifier — Displays the quick combo on the check as modifier.

Auto apply if possible — Allows the system to evaluate the items on the guest check and when the minimum number of each component of a quick combo exists on the check, and the total price of the a la carte items is greater than the price of the quick combo, the eligible items roll up into the quick combo item and the guest is charged the lower discounted price. If cleared, you must manually select each of the components to apply the quick combo. **Related Options: 1)** This option disregards the 'Per check' and 'Per table' options in Maintenance > Payments > Promotions > Restrictions tab. **2)** This option overrides the 'Manager required' option in Maintenance > Payments > Promotions > Promotion tab.

Group delete — Deletes the individual items from the check and only shows the order as a combo.

Allow components with mixed upsell levels — Enables you to order items from all levels defined for the quick combo without breaking the promotion. **Related Options: 1)** To allow the system to automatically calculate size surcharges based on the price difference between items, select 'Auto calculate size surcharges.' **2)** To exclude a component from mixed upsell levels, select 'Exclude from mixed levels determination' on the Components tab. **3)** To enter an upcharge for a size surcharge, type an amount in the 'Size surcharge' column, located in the Items section of the Components tab.

Auto calculate size surcharges — Automatically calculates all size surcharges for the quick combo based on the price difference between components items found in separate mixed levels. **Required Options:** You must select 'Allow components with mixed upsell levels' on the Quick Combo QS tab to enable this option. **Related Options:** This option overrides any value you enter in the 'Size surcharge' column, located in the Items section of the Components tab.

Only print combo name on guest check — Causes the system to print the name of the combo on the guest check without summarizing the items contained in the combo.

Consolidate like components — Causes the system to list multiple instances of items together on the guest check.

Context Panel — Specifies the context panel to automatically appear when you select this quick combo component from the guest check window in the FOH. If you want to use the context panel you associated at the quick combo level, select 'QC Default.' If you want to use the context panel you associated at the item level, select 'Item's Context Panel.' **Required Options: 1)** You must select 'Display Context Panels' in Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab under the 'Options to display' group bar to expose options related to context panels. **2)** You must select 'Uses context panels' in Maintenance > Business > Store > Store Settings tab > User Interface group > 'POS Order Entry Check' group bar to activate the context panel functionality. **Related Requirements:** You must access Screen Designer and select 'Context Panel' on the Properties dialog box to configure a panel as a context panel. **Related Options:** To associate a context panel to the entire quick combo component, select 'Context Panel' in Maintenance > Payments > Promotions > Quick Combo QS > Quick combo QS tab, for the appropriate quick combo.

Group Combo tab

Use the Group Combo tab to define the system behavior when a group combo, or elements that qualify for a group combo, exist on a guest check.

Name — Identifies the group combo on the on-screen and printed guest check when the system auto-applies the group combo. Type a maximum of 25 characters.

Price — Indicates the specific amount to charge for the promotion item.

Auto apply if possible — Evaluates the items on the guest check and when the minimum number of each component of a group combo exists on the check, and the total price of the a la carte items is greater than the price of the group combo, the eligible items roll up into the group combo item and the guest is charged the lower discounted price. If cleared, you must manually select each of the components to apply the group combo. **Related Options: 1)** This option overrides the 'Manager required' option in Maintenance > Payments > Promotions > Promotion tab. **2)** This option ignores the values established in the 'Per check' and 'Per table' options in Maintenance > Payments > Promotions > Restrictions tab.

Allow auto-apply to break promo apart — Allows the system to consider the items in this group combo as eligible to be taken from this group combo to become part of another group combo with a lower ID, should the criteria be met. For example, consider if you select this option for GC ID 20 Chicken Sandwich Combo (1 chicken sandwich, 1 fries, and 1 drink). The guest orders a chicken sandwich, an order of fries, and a drink and the system auto-applies GC ID 20 to the check. The guest then orders another chicken sandwich. The system breaks apart GC ID 20 so that it can auto apply GC ID 1 Two Chicken Sandwich Combo (2 chicken sandwiches, 1 fries, 1 drink) to the check instead. **Related Options:** If you also access Maintenance > Business > Store > Store Settings tab >

User Interface group and select 'Use best price for Group Combo auto-apply' under the 'Functionality' group bar, auto-apply can break apart and take items from this group combo to become part of another group combo only when the new group combo gives a lower subtotal.

Group delete — Allows the selection and deletion of the entire group combo from the guest check, or you can select and delete a single item within the group combo. If the quantity for the item you select for deletion is greater than one, the quantity decrements by one each time you touch Delete. Because the order no longer qualifies for the group combo, the remaining items appear on the guest check as separate items at their regular price. If you clear this option, when you select the group combo and touch Delete, the group combo breaks into separate items at their regular price even though the order qualifies for a group combo.

Only print combo name on guest check — Suppresses all item detail and prints only the group combo name and the associated price on the printed guest check. If you clear this option, the items the guest chooses for each component also print beneath the combo name on the printed guest check. **Related Options:** If you select 'Consolidate like components,' all components for which there are multiple like items consolidate into one line on the printed guest check, preceded by the quantity. If you clear 'Consolidate like components,' each item appears as a separate line on the printed guest check, once for each occurrence.

Note

You get the same results on the printed guest check if you select both 'Only print combo name on guest check' and 'Consolidate like components' as you do if you select 'Only print combo name on guest check' and clear 'Consolidate like components.'

Consolidate like components — Consolidates all components for which there are multiple like items into one line on the printed guest check, preceded by the quantity. If you clear 'Consolidate like components,' each item appears as a separate line on the printed guest check, once for each occurrence.

Components tab (Group Combo)

When you configure a group combo in the Promotion function, you can either select up to ten single items or specify a category of items from which the guest must choose for each component. When the number of items from which a guest must choose for a single component is greater than 10, you must take advantage of categories to accommodate this need. You can take advantage of both single items and categories in the same group combo to meet your needs.

Reference

Refer to the [Group Combos Feature Focus Guide - HKS366](#) for further information.

Group bar: Components

Name — Identifies the combo component.

Category — Identifies the eligible categories.

Minimum — Specifies the minimum quantity of this component that must be purchased.

Maximum — Specifies the maximum quantity of this component that can be purchased. There is no additional charge for the items over the minimum limit.

Price separately — Indicates you want the a la carte price of the item selected for this component to appear next to the item on the guest check. **Related Options:** Selecting this option enables 'Combine price,' which impacts how the group combo price appears in the guest check. If you select 'Combine price,' the a la carte price of the item selected for the component reflects in the total price of the quick combo. If you clear 'Combine price,' the a la carte price of the item selected for the component subtracts from the group combo price on the guest check. If you clear both options, only the group combo total appears on the guest check.

Combine price — Indicates you want the a la carte price of the item selected for this component to reflect in the total price of the quick combo on the guest check. If you clear this option, the a la carte price of the item selected for this component subtracts from the group combo price on the guest check. **Required Options:** You must select 'Price separately,' to enable this option.

Group bar: Items

Use the Items section to associate items to your promotions. Click **Add**, and a new grid row appears towards the bottom of the Items grid.

Item — Identifies each item eligible for the selected promotion.

Punch Edit Reasons

Select **Maintenance > Labor > Punch Edit Reasons** to access this function.

Use the Punch Edit Reasons function to define specific reasons to use when editing a punch on the BOH or FOH. For example, if you commonly edit a punch for employees who forget to clock in, you can define a punch edit reason stating 'Employee forgot to clock in.' The reasons you define appear for selection when you edit a punch using Functions > Edit Punches and also appear with the corresponding punch on the Edited Punches report.

Punch Edit tab

The Punch Edit tab enables you to define reasons for editing a clock in/out or break time for an employee.

Group bar: Settings

Reason — Specifies the reason for editing a clock in/out or a break time for an employee, such as 'Forgot to clock in' or 'Returned early.' Type a maximum of 40 characters. **Related Requirements:** You must access Maintenance > Business > Store > Store Settings tab > Labor group and select 'Use punch edit reasons' under the 'Employee settings' group bar to activate this function and display the reasons while editing a punch in Edit Punches.

Report Settings

Select **Maintenance > Business > Report Settings** to access this function.

Each Back-of-House report you run from the Reports menu for Aloha Configuration Center, Aloha Manager, and Aloha Kitchen provides a Settings dialog box for establishing the parameters under which to run the report. Use Report Settings to establish default selections for these reports so that you do not have to enter them each time you run the report. You can also “lock down” the selections so that anyone running the report cannot make changes to your selections.

Report Settings types

There is a corresponding report type available in the Report list box when you click the New drop-down arrow for every report you can run from the Reports > Aloha Manager, Reports > Aloha Configuration Center, or the Reports > Kitchen menu option (select AK in the product panel first). You can only have one default report record for each report type.

Settings tab

Use the Settings tab to establish whether to use the default selections when the report is run and whether to lock down the selections so that they cannot be changed.

Group bar: Settings

Name — Identifies the report and appears in the ‘Report’ text box when you run the report from the Reports menu.

Group bar: Behavior

Default — Indicates to populate the Settings dialog box that appears when you run the report with the default selections established here; however, you can change the selections when you run the report. **Related Options:** If you also select ‘Locked,’ you cannot change the default selections when you run the report.

Locked — Indicates the default values are “locked” in place. The default selections appear in the Settings dialog box when you run the report and are not available for selection or change.

Options tab

The Options tab mirrors the selections that appear in the Settings dialog box for each report. If you attempt to save the selections on the Options tab before making a required selection, a message appears letting you know how to correct the issue.

Revenue Center

Select **Maintenance > System Settings > Revenue Center** to access this function.

Use the Revenue Center function to summarize income from different sections in the restaurant, such as the drive-thru window, a patio dining area, a main dining area, or a take-out service. These income sources are reported as revenue centers on the various financial reports available through the Aloha POS system.

For a virtual kitchen solution, create a revenue center for each concept/aggregator combination the virtual kitchen uses. Name the revenue center based on the combination, such as 'Aloha Cafe-Take It Away,' where Aloha Cafe is the name of the concept, not the host restaurant, and Take it Away is the name of the aggregator. The system uses the name you assign the revenue center to represent the aggregator elements you configure in Aloha Takeout and Aloha Kitchen.



Reference

Refer to the [Virtual Kitchen Feature Focus Guide - HKS1718](#).

The Revenue Center function also allows you to:

- Disable tips for the revenue center.
- Assign automatic gratuities to the revenue center.
- Enable pivot seating for the revenue center.
- Configure the revenue center for use with a property management system (PMS) interface.

Revenue Center Hierarchy

The system assigns a revenue center to every guest check as soon as you start the guest check, based on the terminal from which you initiate the guest check. The revenue center changes only if you merge the guest check with another guest check belonging to another revenue center. You can also configure a revenue center in the Jobcodes function but this only applies to sales reports and has no bearing on revenue center assignment for a guest check.

Revenue Centers tab

Use the Settings tab to configure basic information to work with revenue centers.

Group Bar: Settings

Name — Identifies the revenue center. We recommend you use a name that is descriptive of the order entry queue, such as Counter, Drive Thru, or Main. Type a maximum of 15 characters. When creating a revenue center for a virtual kitchen, we recommend you include the name of the aggregator with the concept, such as 'Aloha Cafe-Take It Away.'

Disable tips — Disables tip tracking for the selected revenue center only. The system does not prompt you to enter a tip or print a tip line, however, you can adjust tips for payments tendered from this revenue center. **Related Options:** This option overrides 'Allow tips' in Maintenance > Payments > Tenders > Tender tab under the 'Tips' group bar.

Wait for credit card authorization — Pauses the terminal while a credit card transaction is taking place. The Authorization in Progress screen displays during credit card authorizations and the terminal is not available for input until the authorization is complete.

Print check on close — Used to determine how often to print a receipt when a check is tendered on a terminal linked to the specific revenue center.

Default — Disables the Print Receipt option and reverts to the default settings in the Tender function to dictate whether a receipt prints.

Always — Forces a receipt to always print when closing a check on a terminal linked to the specific revenue center.

Never — Prevents receipts from printing when a check is closed on a terminal linked to the specific revenue center.

Close open checks at EOD to tender — Specifies the tender to which to close all checks left open from this revenue center when the end-of-day runs. We recommend you use a tender of the house account type. **Documented Version:** v19.9.

PMS Revenue Center — Allows you to correlate a revenue center used in a property management system (PMS) with a POS revenue center. Any number other than 0 (zero) exports the PMS revenue center ID to the EDC transaction files in place of the POS revenue center ID, allowing for more accurate allocation of sales in the PMS. If left blank or 0 (zero), the Aloha POS revenue center ID continues to export. **Required Options:** Access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display property management' under the 'Options to display' group bar to expose this option.

Concept — Specifies the concept to use for this revenue center. You can only associate one concept per revenue center. Use this option for a virtual kitchen solution. **Required Options:** Access Maintenance > System Settings > Concepts to define a concept. **Documented Version:** v19.9.



Reference

Refer to the [Virtual Kitchen Feature Focus Guide - HKS1718](#).

Options tab

Use the Options tab to configure club member information tracking, and to refine the revenue center for interfacing with a property management system (PMS). If you do not define information on this tab, the '+Tip' text prints on the check by default when you access Maintenance > Payments >

Tenders > Tender tab and select 'Print signature line' under the 'Settings' group bar. Group bars and options only appear on this tab when you select one of the features in Maintenance > Business > Additional Features (Corporate Administration).



Reference

Refer to the Aloha PMS Integration Guide for more information.

Group bar: Hotel management

The 'Hotel management' group bar appears only if you access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display property management' under the 'Options to display' group bar and you are interfacing with a Property Management System.

Tip line text — Specifies the text to print for the tip line on the guest check in place of the standard text when an order originates from this revenue center.

Room line text — Specifies the text to print for the room number line on the guest check in place of the standard text when an order originates from this revenue center.

Verify Hotel information on all tenders — Requires verifying the room number for all tenders applied as payments in this revenue center.

Routing Level

Select **Maintenance > System Settings > Routing Level** to access this function.

Use the Routing Level function to control video group routing for items waiting in an order queue. You can change video group assignments to reroute where pending orders appear on screen from one area of the restaurant to another, such as from Video Group 1 to Video Group 3.



Note

Routing assignments specified using the Routing Level function override any other routing assignments in the system.



Tip

Remember to specify queue, source video group, and destination video group on the same line for each routing assignment. If one of these three elements is missing for a given assignment, the system will not reroute the queue, as intended.

Routing Level tab

Use the Routing Level tab to identify the routing level.

Group bar: Settings

Name — Identifies the routing level. Use names indicative of the level of business under which the routing level is appropriate, such as slow, off-peak, and more. Type a maximum of 20 characters.

Reroute tab

The Reroute tab enables you to reassign video group routing destinations for items in a specific queue, such as Walk-In Queue, Call-In Queue, and more.

Order queue — Identifies the queue to route from one video group to another.

Reroutes from video group — Specifies the video group currently assigned to the selected order queue.

Reroutes to video group — Specifies the destination video group to which to reroute the selected order queue.

Scales

Select **Maintenance > Hardware > Scales** to access this function.

Scales enhance the POS system by allowing you to calculate the price of a menu item, such as a salad, based on its weight. Click the New drop-down arrow to select from the list of scales currently supported in the Aloha POS system: Mettler Toledo (8217 and 8213), NCI (6702, 6710, and 6720), CAS PD II (using a Mettler Toledo 8213 emulation), and the Brazilian Toledo Prix III scale.

For sites in the United States, it is a requirement of the National Conference of Weights and Measures (NCWM) that POS systems interfacing with scales be compliant with the standards set forth by the National Type Evaluation Program (NTEP). The NTEP program was established in 1984 by a task force of weights and measures officials, as well as manufacturers and users of weighing devices. The purpose of this program is to govern a set of requirements for evaluating commercial weighing and measuring devices before they are sold. Failure to abide by these regulations could result in penalties and the removal of the scale from the workplace. Compliancy is not mandatory for International locations.



Reference

Refer to the [Scales Feature Focus Guide - HKS1480](#) for more detailed instructions.

Scale tab

Use the Scale tab to set up and use one or more scales at your establishment.

Group bar: Settings

Name — Identifies the scale. We suggest the name be descriptive or reflect its physical location. Type a maximum of 25 characters.

Terminal — Identifies the terminal to which you physically connect the scale.

Port — Specifies the port on the terminal to which you physically connect the scale, such as COM 1, COM 2, and more.

Display Weight on Pole Display — Enables the weight measurement from the scale to appear on a pole display.

Reset to zero not required — Eliminates the need to reset the scale to zero between readings. Used for International sites only. This option is not in compliance with NTEP regulations and therefore does not appear for domestic sites. **Required Options:** You must access *Maintenance > Business > Store > Store Settings tab > System group* and select 'Use special currency' under the 'Regional Settings' group bar, and define a currency other than 'US Dollar.'

Screen Designer

Select **Maintenance > Screen Designer > Quick Service Screen Designer** to access this function.

Quick Service Screen Designer is a robust tool that enables you to create and modify the function and order entry screens you use to interact with the Aloha POS system. Screen Designer enables you to easily customize your screens for the way you do business. From designing the layout of each screen, to specifying which menu items, promotions, manager functions, and employee functions are available on a screen, Screen Designer enables you to define the entire look, feel, and function of your Aloha POS system.



Reference

Refer to the [Quick Service Screen Designer Guide](#) for more information on panel types and how you can use them to build your Quick Service user interface.

Security Roles

Select **Maintenance > Labor > Security Roles** to access this function.

Security Roles control access to Back-of-House functions available in your configuration management tool, either Aloha Manager or Aloha Configuration Center. The products currently supported by the configuration management tool and for which you can establish security roles include: POS (Aloha Table Service, Aloha Quick Service), EDC (Electronic Draft Capture), Aloha Kitchen, Aloha Takeout, and ORDERPOINT!.

When you create a security role, you assign rights to that role that allow an employee to view, add, edit, or delete records in the Back-of-House for these products, very like how POS access levels control tasks an employee can perform in the Front-of-House. Use the Security Roles function to create the various security roles your operation requires and then use the Employees function to assign a security role to a specific employee.

Default Security Role

The system provides a default system-owned security role that cannot be edited or deleted from the system.

All (997) provides rights for most of the tasks in the system. This security role is appropriate for support technician type employees.



Note

If you need a security role with access that is different from this default role, you must manually create the new security role.

Security Role Rules

The security role assigned to your employee record has a direct impact on the data you can access and modify in the system, as well as the security roles you can assign to other employees. Review the following rules to understand how security role rights might affect you as you work in the system:

- If you are responsible for modifying security roles, the security role assigned to you must have at least the same rights, or more, than the security role you want to modify. For example, if you are responsible for adding rights to a Manager security role, then the security role assigned to your employee record must have at a minimum, the same rights as the Manager security role.
- If you are responsible for adding employees to the system, the security role assigned to you must have at least the same rights, or more, than the security role you assign to the employee in Maintenance > Labor > Employees.
- If assigning additional rights to a security role, be sure to also assign those rights to any other security role with an equal or greater level of responsibility. For example, a manager typically has a greater level of authority and responsibility than the cashier supervisor. If the Manager security role does not have at least the same rights as the Cashier Supervisor security role, the manager

might not be able to make changes to the Cashier Supervisor security role, or assign the Cashier Supervisor security role to an employee.

Security Role tab

Use the Security Role tab to define basic information about a security role, such as number, name, and description.

Group bar: Identification

Name — Identifies the security role, such as 'Supervisor.' Type a maximum of 18 characters.

Description — Provides a more detailed description of the security role, such as 'Supervisor for the FOH staff.' Type a maximum of 500 characters.

Screen timeout in seconds — Specifies the number of seconds before access to the Back-of-House times out from inactivity. Once the screen times out, employees must log in again to regain access. Valid entries range from 60 to 900. The default is 900.

Disable change password — Prevents employees assigned this security role from changing or resetting their own BOH passwords. If the selected security role has access to change or reset BOH passwords for other employees, that remains unaffected.

User lockout attempts — Specifies the number of times an employee with the selected security role can try to log in before the system locks them out. If an employee gets locked out, they need to contact their manager or first line of support. Due to PCI requirements, you must lock a user out of the system after so many failed attempts. Valid entries range from 1 to 6. The default value is 6. You cannot enter a value less than 1 or greater than 6. CFC and Aloha Manager do not support any automatic 'unlock after x minutes' behavior. Once an account becomes locked, it remains locked until it is reset by an admin.)

Password expires after this many days — Specifies the number of days after which an employee assigned this security role must change their Back-of-House password. When a password expires, the system prompts the employee to enter a new password at login. Due to PCI requirements, a password must always be set to expire. Valid entries range from 0 (zero) to 90. The default value is 90. A zero (0) value indicates the password never expires; however, enforcing password expiration is the recommended best practice. You cannot enter a value less than 0 or greater than 90.

Number of historical passwords to retain — Specifies the number of previously used passwords the system disallows for an employee creating a new password. Type the number of recent passwords you want to prevent employees re-using, when they create new passwords. Valid entries range from 4 to 99. The default value is 4.

Home page web address — Contains the path to an HTML page to appear on the Main screen when an employee logs in to the system. The Home page, which can be a website or a path to a file, has a maximum of 4000 characters. Type the full path to the file, if internal. For example: C:\Documents\WelcomePage.jpg -OR- type the URL for the desired site or HTML page. For example: [http://\[yourcompany\].com](http://[yourcompany].com).

Product Tabs

The remaining tabs represent the individual products you configure using the data management tool and each tab lists the functions or applications to which you assign view, add, edit, or delete access for the security role. An additional tab appears for Alerts, which refers to the service that runs in the background and provides the foundation for the system to deliver alerts based on conditions or events for which you want your restaurant managers and staff to take action.



Reference

Refer to the [Alerts Feature Focus Guide - HKS334](#) for more information about the Alerts function.

Group bars on each tab sort the various functions into categories. Click the triangle in each group bar to expand or collapse the category for easier viewing. For example, the Maintenance category contains all functions related to maintenance functions in the selected product, such as Employees, Items, and more. To view or edit security access for functions on the Maintenance menu, expand the Maintenance group bar on the individual product tab, and locate the specific function.

A separate row appears for each function for which you can assign access. Click View, Add, Edit, or Delete to specify the exact access an employee has under that security role.

View — Enables the employee to launch, access, and view the selected function in the system. You must select View to enable the Add, Edit, and Delete privileges.

Add — Enables the employee to add new records for the selected function in the system.

Edit — Enables the employee to edit records for the selected function in the system.

Delete — Enables the employee to delete records for the selected function in the system.

Size Groups

Select **Maintenance > Menu > Size Groups** to access this function.

Size Groups enable you to easily change the size of an item on the guest check, including the modifiers that come with the item, instead of requiring you to delete the item first. You add an item in the size group to the guest check and then use another 'Change Size' button to increase, decrease, or 'leap to' a specific size of the item, should the guest request a larger or smaller size. For example, the guest orders a 6" sandwich that comes with four ounces of meat and two pickles on a six inch bun and then changes their mind and wants a 12" sandwich that comes with eight ounces of meat and four pickles on a twelve inch bun. Instead of deleting the 6" sandwich, you can touch the 'Change Size' Button to switch the item to a 12" sandwich. Use the Change Size button function in Quick Service Screen Designerto create the buttons that change the size of the item.

Size groups are beneficial only when you price the modifiers separately from the menu item, according to size, and need the price of the item modifiers to increase the price of the menu item when you change the item size.

Size Group Quick Tips:

Rules or tips to follow when you add new size groups:

- You must add each item to the size group in order of smallest to largest size to properly increase and decrease the size.
- You must create a size group for each priced modifier that changes size based on the item it modifies. In this example, the pickle modifier goes from two pickles to four pickles when the item size increases to a 12" sandwich, so you need a size group that designates a 2-pickle priced modifier in Level 1 and a 4-pickle priced modifier in Level 2.

Size Group tab

Use the Size Group tab to identify the size group and select an item for each level in the size group, from smallest to biggest.

Group bar: Settings

Name — Identifies the size group. Using a descriptive name, such as Sandwich, helps you identify size groups more quickly.

Level 1 (Smallest) through Level 10 (Largest) — Designates the specific item for the level in the size group. For example, you would assign 'Small Sandwich' to Level 1, '6" Sandwich' to Level 2, and '12" Sandwich' to Level 3 (smallest to largest). The item you select for a specific size level must coincide with the same level for its corresponding modifiers in the size order.

Skins

Select **Maintenance > System Settings > Skins** to access this function.

A skin is a set of graphical elements, such as a designed color scheme, theme, background, images, buttons and controls, which give the interface a completely different look without changing functionality. The Aloha system comes preloaded with 28 skins from which you can choose. The skin you choose can remain static (always appear) or you can choose a skin for a specific occasion, such as the holiday season, or any other purpose. For example, you can use the Winter skin seasonally or you can use the Coffee skin if you operate a coffee shop. You can also create skins to your corporate standards, such as branding the skin to the colors used at your restaurant. For example, if the color scheme at your restaurant is gold and silver, you can create a skin that predominately uses the colors gold and silver.

The attributes for each skin are defined in EGI.cfg, located in the Data and Newdata directories; however, you need to make all your configuration changes for skins in Skin Maintenance and not directly in this file. If you wish to use a predefined skin without any alterations, you need only go into Stores and select a skin from the 'Graphical skin' drop-down list. If you want to change a predefined skin, or configure a skin from scratch, you must access Skin Maintenance and configure the attributes of the skin, including the menu and submenu areas, if desired.

The controls for customizing a skin are all Windows standard controls. For example, you can click any option requiring a color and open a Windows color-picker grid to select the desired color. If you decide to customize your own skins, we recommend you copy a predefined skin and make your desired alterations, so that no attributes accidentally get omitted.



Caution

If you edit a predefined skin and overwrite the original, you must reinstall to reset the original attributes.

State

Select **Maintenance > Labor > State** to access this function.

The State function works in conjunction with the County function, for use in NCR Back Office Labor. Use this function to define your states and associate one or more counties to a state, as needed. You define counties in Maintenance > Labor > County.

State tab

Use the State tab to add one or more valid states to your database. Once you add them, select the appropriate state when establishing store and employee addresses.

Name — Identifies the state. Type a maximum of 15 characters.

Counties tab

Use the Counties tab to associate one or more counties with a state. The 'Available' list, on the left side of the screen, contains the counties that currently exist in the database. The 'Included' list, on the right side of the screen, contains the counties currently assigned to the selected state. Use the >> and << arrows to move counties between the 'Available' list and the 'Included' list.

Store

Select **Maintenance > Business > Store** to access this function.

The system automatically creates a store during the system installation/import process. This function enables you to configure default system settings for your store.

The Store function separates options into groups, based on the area of the Aloha POS system affected by your selections. The system provides default values for some of the options, and although you do not have to create or change each one, we recommend you review each selection to ensure it meets the needs of the store.

Location Information tab

Use the Location Information tab to define basic settings for the store, such as store number, address, and telephone number. The initial setup completes this automatically; however, we recommend you review the information on this tab and make changes, as necessary.

Group bar: Settings

Store name — Identifies the store. Type a maximum of 35 characters.

Active POS version — Identifies the current Aloha POS version installed at the store. The POS version dictates the options that appear on function screens in the system. **Important:** When you change the active POS version for a store, you must log out and log back in to Aloha Manager before any options for the new version appear.

GST business number — Identifies the business or federal ID number that you use for tax reporting purposes. Type a maximum of 20 characters.

Address 1 — Identifies the physical street address. Type a maximum of 25 characters.

Address 2 — Identifies the second line of the physical street address, if necessary. Type a maximum of 25 characters.

Mailing address 1 through Mailing address 4 — Specifies the street, box, or other address used by your establishment for postal purposes. Type a maximum of 30 characters.

Telephone number 1 — Specifies the phone number at your store. Type a maximum of 26 characters.

Telephone number 2 — Specifies an alternate phone number for your store. Type a maximum of 26 characters.

City / town — Designates the city or town. Type a maximum of 20 characters.

State — Designates the state. Type a maximum of 15 characters.

County — Designates the county. Type a maximum of 25 characters.

Postal code — Indicates the federal ZIP code used by your store.

Group bar: Network

TERMSTR — Defines the default terminal-naming convention that you must use on all Aloha terminals and file servers in the system. For example, if you type TERM in 'TERMSTR,' then you must name your terminals TERM1, TERM2, and more. Type a maximum of 25 characters.

IBERDIR — Identifies the directory location of the POS folder. Type a maximum of 25 characters.

Licensing tab

Use the licensing tab to store your assigned security license key information. The initial client setup supplies this information automatically; however, we recommend you review the information on this tab and make changes, as necessary.

Group bar: Licensing

Enable NCR Aloha Licensing — Provides enhanced security to protect against software piracy without requiring the use of a hardware HASP Key. **Related Options:** Selecting this option enables 'License ID.'

License ID — Identifies the ID number for the current license. **Required Options:** You must select 'Enable NCR Aloha Licensing' to enable this option.

Security line 1 through Security line 6 — Indicates the assigned security license numbers required by a hardware HASP Key.

HASP Key Number — Represents the physical HASP key on the file server at a site. The system auto-populates this for you at the same time it reads the POS version number. This value appears as read-only.

Custom tab

Use the Custom tab to customize the store-specific settings and values that the Aloha POS system stores in Aloha.ini.



Note

Contact your NCR Voyix representative for further information regarding custom settings.

Store Settings tab

Use the Store Settings tab to configure baseline system functionality for an individual store. If you select certain options in other areas of the user interface, these options override the default options selected in Store Settings. The description for an option in other areas of the user interface indicates whether it overrides the default option on the Store Settings tab.

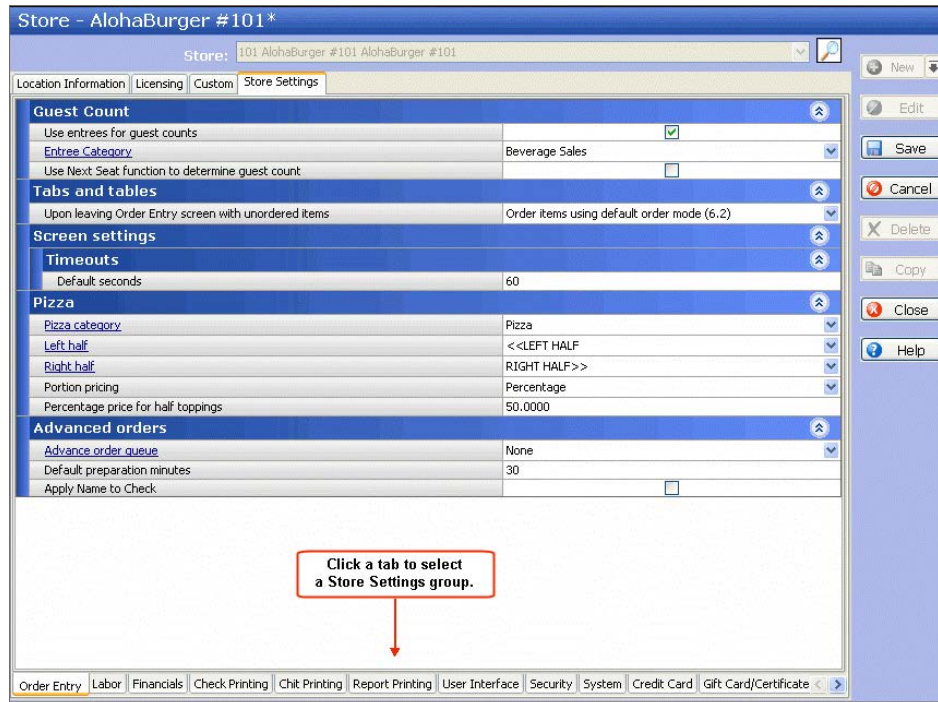


Figure 4 - 9 Store Settings Groups

The Store Settings tab separates the options into groups based on the area of the system affected by the options. The system provides default values for some of the options, and although you do not have to edit each value, you should review them to ensure they are applicable for your restaurant environment.



Note

To view or edit options for a specific Store Settings group, click the applicable group name that appears at the bottom of the Store Settings tab.

Order Entry Group

Use the Order Entry group to configure basic options relating to the order entry process.

Group bar: Guest Count

Use entrees for guest counts — Calculates the guest count using the number of entrées sold from the category selected in 'Entree Category.' Each time you order an item from the selected category, the guest count increases by the default weight of one; however, you can define a menu item to carry a different guest count weight. You typically select entrées to track guest counts, but you can use any category of items to count guests, such as drinks. **Related Options: 1)** Selecting this option enables 'Entree Category.' **2)** To enable items to use a guest count weight other than the default weight of one, access Maintenance > Menu > Items > General Settings tab and enter the guest count value in 'Guest count weight' under the 'General' group bar.

Entree Category — Designates the category the system uses to calculate guest counts. While you typically count guests using entrees, you can use any category of items to count guests. **Required Options:** You must select 'Use entrees for guest counts' to enable this option.

Use Next Seat function to determine guest count — Enables you to count each sub-order as a guest when using suborders. **Related Options:** If you select this option along with 'Use entrees for guest counts,' the system determines the guest count.

Reports use fractional guest counts — Shows guest count values with two decimal places on the following reports: FOH Server Sales report, FOH Flash report, BOH Server Sales report, BOH Sales by Revenue Center report, and the BOH Summary and Weekly Sales reports. This option also impacts any custom FOH report for which you include the #Guests variable in the configuration. The guest count values appear with decimal places only when you sell an item configured with a fractional guest count weight. **Required Options: 1)** You must select 'Use entrees for guest counts' on this same tab and specify an 'Entree Category' to use fractional guest counts. **2)** To define items with a guest count weight, access Maintenance > Menu > Items > General Settings tab, and type a whole or fractional number in 'Guest count weight' under the 'General' group bar.

Group bar: Screen settings > Timeouts

Default seconds — Denotes the number of seconds without activity before the FOH screen times out and returns to the FOH Floating Logo screen. You set this number to reflect the individual needs of your restaurant, although 30 seconds is typical.

Group bar: Pizza

Pizza category — Specifies the category of items from which the Pizza Modifiers screen displays. When you modify a category, the change applies to all items assigned to that category. **Related Requirements:** This option applies only to Basic pizza users.

Left half — Specifies the item to represent the left half of the pizza. The name of this item appears on the guest check when using the Pizza Modifiers feature. **Related Requirements:** This option applies only to Basic pizza users.

Right half — Specifies the item to represent the right half of the pizza. The name of this item appears on the guest check when using the Pizza Modifiers feature. **Related Requirements:** This option applies only to Basic pizza users.

Whole pizza included modifier substitution rules — Adjusts price automatically when you remove an included topping from a pizza, and substitute one or more add-on toppings. The system determines the price difference between the included topping that was removed, and the toppings you add, and adjusts the price accordingly. You configure the system to use either the original price of the included modifier or the price of the add-on topping, if lower. **Related Requirements:** This option applies only to Advanced pizza users.

Portion pricing — Indicates the pricing method to use on pizza halves. **Related Requirements:**
 This option applies to both Basic and Advanced pizza users.

Percentage — Prices pizza halves based on a percentage of the base topping price. For example, if you enter 60% as the percentage and the charge for a pizza topping is \$1.00, then the charge for a half topping is \$0.60. Percentage Pricing is the default selection and the default percentage is 50%.

Average — Prices pizza halves based on the average of the combined price of the left and right halves. For example, if a customer orders a pizza with a base price of \$12.00 and wants bacon - \$1.00, extra cheese - \$0.75, and onions - \$0.50 on the right half, but only green peppers - \$0.50 on the left half, the average price calculates based on the following:

Right Half*	\$14.25*
Left Half*	\$12.50*
$\$14.25 + 12.50 / 2$ *	\$13.38*

Figure 4 - 10 Average Example

Highest Fraction — Prices both pizza halves with the price of the higher priced half. For example, if a customer orders a pizza with a base price of \$12.00 and wants bacon - \$1.00 on the right half, and extra cheese - \$0.75 on the left half only, the customer is charged the higher price of \$13.00. The price calculates based on the following:

Right Half*	\$13.00*
Left Half*	\$12.70*

Figure 4 - 11 Higher Price Example

Whole Price — Calculates toppings at full price and allows no variations for split toppings. For example, if a customer orders a pizza with a base price of \$12.00 and wants bacon - \$1 on the right half, and hamburger - \$1.00 on the left half, the price calculates based on the following:

Base Price*	\$12.00*
Bacon*	\$1.00*
Hamburger*	\$1.00*
Total	\$14.00

Figure 4 - 12 Whole Price Example

Topping Average (Advanced Pizza Only) — Prices a pizza using the following calculation: (average price of all toppings ordered for just a fraction of the pizza x fractional topping average rounded up integer) + price of all whole toppings + base price. The class Pizza Modifier screen

does not support this pricing method. **Related Requirements:** This option applies only to Advanced pizza users.

Percentage price for half toppings — Indicates the percentage amount to use when portion pricing is in effect. **Required Options:** You must select 'Percentage' from the 'Portion pricing' drop-down list to enable this option. **Related Requirements:** This option applies to both Basic and Advanced pizza users.

Screen flow follows modifier group setup — Enables the system to follow the screen flow requirements from the individual modifier groups attached to the pizza item. If one or more modifier groups has 'Screen Flow Required' selected, or if a value of more than zero in the 'Min' field displays. Use this option if you do not want the Pizza screen to automatically appear when you select a pizza item from the FOH. If cleared, the system automatically displays the Pizza screen when you select a pizza item. **Related Requirements:** This option applies only to Basic pizza users.

Group bar: Advanced orders

Advance order queue — Defines the order entry queue in which to automatically place all of your advance orders. If you select 'None,' you can select a queue for each advance order. **Related Requirements:** To define an order entry queue specifically for advance orders, access Maintenance > System Settings > Order Entry Queue.

Default preparation minutes — Defines the default increment for preparation time needed for advance orders. For example, if you type 30 minutes, you can only use increments of 30 minutes, such as 30, 60, 90, and 120 minutes. The default is 30 minutes.

Apply Name to Check — Automatically names the check with the description used when you place an advance order.

Group bar: Speed of service

Speed of service maximum order time in seconds — Specifies the number of seconds, from 0 (zero) to 999, to use when a speed of service end point has not yet been reached. You reach an end point when you close, bump, or serve an order to a guest. **Related Options:** Access Maintenance > System Settings > Order Entry Queue > Order Entry Queue tab and define the end points to use for each order entry queue in 'Number of seconds for yellow indicator' and 'Number of seconds for red indicator' under the 'Speed of Service' group bar. **Documented Version:** v12.3.

Reset speed of service on terminal after each day part — Indicates you want to reset the TRM and STR speed of service indicators that appear on each POS terminal after each day part instead of at the end of a business day. **Documented Version:** v14.1.

Labor Group

Use the options in the Labor group to configure scheduling requirements, employee settings, break approval rules, tip-share settings, and more.

Group bar: Scheduling

Allow employees only one shift per day — Restricts all non-scheduled employees from working more than one shift, per day. This option applies only if the employee is not scheduled to work for the day, or if you do not use a labor schedule. **Related Options: 1)** To ignore shift requirements for an employee, access Maintenance > Labor > Jobcodes > Jobcode tab and select 'Exclude from Labor Scheduling' under the 'Time and Attendance' group bar, and assign the job code to the employee. **2)** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee.

Prompt for manager password if unscheduled — Prompts for a manager password if an employee attempts to clock in but is not scheduled to work. **Required Options:** You must select 'Use clock-in punctuality' to operate this feature. **Related Options: 1)** To define the period start date, access Maintenance > Business > Store > Store Settings tab > System group and select a date from the 'First day of week' drop-down list under the 'Day/Time' group bar. **2)** To ignore shift requirements for an employee, access Maintenance > Labor > Jobcodes > Jobcode tab, clear 'Shift required to clock in/out' under the 'Time and Attendance' group bar, and assign the job code to the employee. **3)** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee.

Enable labor schedule — Activates the punctuality options forcing employees to adhere to schedules created in either the internal Basic Labor Scheduler or the Aloha Labor Scheduler add-on program. **Related Options: 1)** To ignore shift requirements for an employee, access Maintenance > Labor > Jobcodes > Jobcode tab, clear 'Shift required to clock in/out' under the 'Time and Attendance' group bar, and assign the job code to the employee. **2)** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee. **Related Requirements: 1)** To create a schedule with Basic Labor Scheduler, select Functions > Basic Labor Scheduler. **2)** To create a schedule with Aloha Labor Scheduler, refer to the Aloha Labor Scheduler User Guide.

Schedule is not required — Specifies that employees can clock in without manager approval, even if they are not scheduled for the current day. If scheduled, the employee must clock in at the assigned time. **Required Options:** You must select 'Use clock-in punctuality' to operate this feature. **Related Options:** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee.

Use clock-in punctuality — Enforces the scheduled clock-in time for a shift. You must schedule shifts for employees in Aloha Labor Scheduler or Basic Labor Scheduler to use clock-in punctuality. **Related Options: 1)** To ignore shift requirements for an employee, access Maintenance > Labor > Jobcodes > Jobcode tab, clear 'Shift required to clock in/out' under the 'Time and Attendance' group

bar, and assign the job code to the employee. **2)** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee. **Related Requirements: 1)** To create a schedule with Basic Labor Scheduler, select Functions > Basic Labor Scheduler. **2)** To create a schedule with Aloha Labor Scheduler, refer to the Aloha Labor Scheduler User Guide.

Number of minutes allowed for early clock-in — Specifies the number of minutes before the start of a scheduled shift that an employee can clock in without manager approval. Type a number from 0 to 99. **Related Options: 1)** To configure an employee to allow an early clock-in, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Approve clock in' under the 'Employee' group bar. **2)** To ignore shift requirements for an employee, access Maintenance > Labor > Jobcodes > Jobcode tab, select 'Exclude from Labor Scheduling,' and assign the job code to the employee. **3)** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee.

Number of minutes allowed for late clock-in — Specifies the number of minutes after the start of a scheduled shift that an employee can clock in without manager approval. Type a number from 0 to 99. **Related Options: 1)** To configure an employee to allow a late clock-in, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee. **2)** To ignore shift requirements for an employee, access Maintenance > Labor > Jobcodes > Jobcode tab, clear 'Shift required to clock in/out' under the 'Time and Attendance' group bar, and assign the job code to the employee. **3)** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee.

Number of minutes allowed to clock-in after manager authorization — Specifies the number of minutes within which an employee must clock in or clock out after a manager, or an employee with sufficient access, resets it using 'Allow Clock In' or 'Allow Clock Out' on the FOH Employee screen. Type a number from 0 to 99. **Related Options: 1)** To ignore shift requirements for an employee, access Maintenance > Labor > Jobcodes > Jobcode tab, clear 'Shift required to clock in/out' under the 'Time and Attendance' group bar, and assign the job code to the employee. **2)** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee.

Use clock-out punctuality — Enforces the scheduled clock-out time for a shift. You must schedule shifts for employees in Aloha Labor Scheduler or Basic Labor Scheduler to use clock-out punctuality. **Related Options: 1)** To ignore shift requirements for an employee, access Maintenance > Labor > Jobcodes > Jobcode tab, clear 'Shift required to clock in/out' under the 'Time and Attendance' group

bar, and assign the job code to the employee. **2)** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee.

Number of minutes allowed for late clock-out — Specifies the number of minutes after a shift ends that an employee can clock out before the Manager Approval screen appears. **Related Options:** **1)** To configure an employee to allow a late clockout, select 'Approve clock out' under the 'Employee' group bar on the Access Level tab in Maintenance > Labor > Pos Access Levels. **2)** To ignore shift requirements for an employee, access Maintenance > Labor > Jobcodes > Jobcode tab, clear 'Shift required to clock in/out' under the 'Time and Attendance' group bar, and assign the job code to the employee. **3)** To allow an employee to override this restriction in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve clock in' under the 'Employee' group bar, and assign the access level to the employee.

Display clock-in break message — Indicates that a message will appear when an employee logs in to the FOH terminal.

Message — Indicates the clock-in message that appears when an employee clocks in to the FOH terminal.

Printed schedule shows — Determines the format to use for printing the date on the schedule and the clock-out chit when you configure the system to print employee schedules from the FOH.

Date — Prints the date in mm/dd/yyyy format on the schedule and the clock-out chit.

Day of the week — Prints up to 10 characters for the day of the week, such as Sunday, on the schedule and the clock-out chit.

Use employee schedule to qualify breaks — Allows the system to use the employee schedule to determine when an employee qualifies for a break. **Required Options:** You must select 'Enable labor schedule' to enable this option. **Related Options:** If a contiguous shift is enabled, the system applies the shifts to qualify breaks for the sum of scheduled hours of contiguous shifts. **Documented Version:** v12.3.

Workweek hours threshold — Specifies the number of hours, typically 30, after which an employee reaches the equivalent of a full-time workweek. Federal mandate requires tracking and reporting on the number of full-time equivalent employees in your restaurant, for the Affordable Health Care Act.

Group bar: Employee settings

Employee minimum age — Defines the minimum legal age for employee in your state. When you add an employee, the system uses the employee date of birth to determine if the employee is at least the minimum legal age to work in your state. An error appears if you try to add an employee who is too young.

Minor age is under — Specifies the age at which you are no longer considered a minor, based on the laws in your state. Type '0' to indicate there is no minor age defined in your state. **Related Options:** This option works in conjunction with Maintenance > Labor > Employees > Status tab, 'Exempt from minor break rules' under the 'Break exemption' group bar, and Maintenance > Labor > Break Rules > Break Rule tab, 'Only applies to minors' under the 'Qualifiers' group bar. This option does not apply to Maintenance > Labor > Break Rules > Break Rule tab, 'Employee age range type' under the 'Qualifiers' group bar. **Documented Version:** v12.3.

Minimum wage — Specifies the minimum wage rate for non-tipped employees. Enter a number up to 999,999.99.

Print employee ID on Interactive Message Chit — Prints the employee ID on the chit if you configure the system to print a chit when an employee provides a 'No' response to an interactive message.

Auto-Clock Out time — Enables the system to automatically clock out any employee who forgets to clock out at the end of their shift and is still clocked in at the time the EOD occurs, based on your selection. You can choose to not use this feature or use the employee checkout time as the employee clock out time. You can choose to not use this feature, use the employee checkout time as the employee clock out time, or use the time at which the End-of-Day process runs as the employee clock out time. If an employee has not run a checkout, the system checks them out, and then clocks them out. For non-order entry employees, the system clocks them out at the time of EOD. It may be necessary to make pay adjustments no matter which method you choose. This option was called 'Auto clock out at End of Day.' **Related Options:** If you select 'End of day,' in 'Auto-Clock Out time,' along with '24-hour operation' under the 'Day/Time' group bar in Maintenance > Business > Store > Store Settings tab > System group, the system clocks employees out at the time EOD runs, but does not clock them back in for the new business day. **Documented Version:** v19.3. Prior to v19.3, this option was called 'Auto clock out at End of Day.' **Related Options:** If you select 'End of day,' in 'Auto-Clock Out time,' along with '24-hour operation' under the 'Day/Time' group bar in Maintenance > Business > Store > Store Settings tab > System group, the system clocks employees out at the time EOD runs, but does not clock them back in for the new business day.

Upgrade Path: Upon upgrade to POS v15.1, if 'Auto clock out at End of Day' is False (not selected), the drop-down selection for 'Auto-Clock Out time' is set to 'None.' If 'Auto clock out at End of Day' is True (selected), the drop-down selection for 'Auto-Clock Out time' is set to 'Checkout time,' in

keeping with current functionality. No action is required on your part unless you want to change the feature to use the time at which the End-of-Day runs instead.

None — Disables the auto-clock out feature. The system discards the shift times for employees who do not check out before the EOD runs, and the shift does not appear in edit punches.

Related Options: If you select '24-hour operation,' under the 'Day/Time' group bar in Maintenance > Business > Store > Store Settings tab > System group, the system clocks employees out at the time EOD runs and then clocks them back in for the new business day.

Checkout time — Uses the employee checkout time as the employee clock out time. For example, if an employee checks out at 3:00 p.m. and the EOD process runs at 11:00 p.m., the system records the clock out time as 3:00 p.m., same as the checkout time for the employee. This may result in under-paying an employee and a pay adjustment may be required.

End of day — Uses the time at which the EOD process runs as the employee clock out time. For example, if an employee checks out at 3:00 p.m. and the EOD process runs at 11:00 p.m., the system records the clock out time as 11:00 p.m., the time at which the EOD process runs. This may result in over-paying an employee and a pay adjustment may be required.

Allow current day punch edits from POS terminals — Allows you to edit clock-in and clock-out times by selecting 'Edit Clock In' on the FOH Employee screen.

Assign drawers only to clocked in employees — Prevents the ability to assign a drawer to an employee until the employee clocks in to the system.

Use edit punch reasons — Enables you to specify a reason for editing a punch from the BOH and FOH. The reason for each edit appears on the Edit Punches report. **Related Requirements:** Access Maintenance > Labor > Punch Edit Reasons to create edit punch reasons.

Suppress pay rate on edit punch screens — Hides employee pay rate information on the Edit Punches screens, including 'Edit Shift Data' and 'Edit Other Wage Data' screens. Use this option if you have managers who are paid hourly and their pay rate is entered into the system. **Documented Version:** v14.1.

Print break receipts — Prints a break receipt to the local printer when an employee starts and ends a break.

Consider contiguous shifts when qualifying breaks — Allows the system to sum the hours worked from contiguous shifts when qualifying for a break rule, if the punches are within a specified time. If cleared, the hours worked resets with each new shift. **Related Options:** This option enables 'Minutes between shifts are less than.' **Required Options:** To allow an employee to work contiguous shifts, access Maintenance > Labor > Jobcodes > Jobcode tab, select 'Allow contiguous shifts' under the 'Breaks' group bar, and assign that job code to an employee. **Documented Version:** v12.3.

Minutes between shifts are less than — Specifies the maximum number of minutes that can lapse between shifts, from 0 to 30, that when less than, the hours from two or more shifts can be summed together and count as a single shift, when qualifying for a break rule. **Required Options:** You must select 'Consider contiguous shifts when qualifying breaks' to enable this option.

Indicate minors on labor report and edit punches — Adds an indicator on labor reports and punch edits to identify minor employees.

Group bar: Employee settings > Schedule not used or employee not scheduled

Prompt for Waive Break messages — Always shows waive break messages at clock in, even when using a schedule or the employee is not scheduled to work. The message appears even when you configure the message to appear at clock out.

Prompt for Break Reminder messages — Always shows break reminder messages for an unwaived break at clock in even when using a schedule or the employee is not scheduled to work. All break reminder messages appear, even when you configure the messages to appear at clockout. **Related Options:** Selecting this option enables 'Default break reminder message.'

Default break reminder message — Specifies the break reminder message to display at clock in when you do not use schedules, or when a currently clocked in employee is not on the schedule. **Required Options:** You must select 'Prompt for Break Reminder messages' to enable this option. **Related Requirements:** Access Maintenance > Messaging > Break Reminder Messages to create break reminder messages. **Documented Version:** v12.3.

Group bar: Employee settings > Break Approvals

Manager must approve clock out when Break is violated — Shows a notification when an employee clocks out with a violation. The manager, or an employee with sufficient access, must approve the clock out before the employee can leave. At this time, the manager must decide the action to take on the violation. The manager may require the employee to stay on the clock and take a forgotten break, may adjust the employee break time at a later time, using the Edit Punches function, or may allow the employee to clock out with a violation.

Manager must approve clock out when Penalty Pay is earned — Requires a manager to approve the clock out for an employee when the employee earns penalty pay, if your area requires the restaurant to pay extra wages for a break rule violation. Penalty pay is used in certain jurisdictions that allow monetary compensation to an employee in lieu of not taking their required break. The penalty pay amount usually equals an hour of regular or minimum wage, depending on the requirements of the local law.

Group bar: Employee settings > When approving early return from an enforced break

Display interactive message — Requires a manager to acknowledge a message that the employee returned early from a mandated break. **Required Options:** Selecting this option disables 'Manager must approve an early return from an enforced break.'

Manager must approve early return from an enforced break — Requires manager approval when an employee returns early from a break. You can configure the system to take action on the early return by keeping the break as punched, or removing the break if the break minutes are below the defined threshold. **Required Options:** Selecting this option disables 'Display interactive message.'

Show Break Reminder Message on JIT — Displays additional text on the manager approval screen for early break returns, alerting the manager approving the return of legal requirements and potential issues, allowing them to make more informed decisions regarding employee breaks. **Required Options:** You must select 'Manager must approve early return from an enforced break' to enable this option. **Related Requirements:** You must first create this message in Maintenance > Messaging > Break Reminder Messages. **Documented Version:** v17.1.

Early return from break options — Uses the options you configure in Maintenance > Business > Store > Store Settings tab > Labor group under the 'Break Approvals' group bar to determine what to do with the minutes not taken or with the break itself, when you allow an employee to return from a break early. You can configure the Aloha POS system to handle the enforcement regarding ending a break early in three ways:

Keep the break as punched — Informs the system to keep the break type and break minutes as punched when an employee returns from a break early. The employee can approve the early break return (no manager approval required) and the system takes corrective action, if needed.

Remove minutes when less than threshold — Specifies the manager must approve the early break return and the system takes corrective action, as required. The system removes the break if the total break minutes taken is less than the defined threshold. **Related Options:** Selecting this option enables 'Remove break minutes when less than percent.'

Prompt manager options — Requires manager approval when an employee returns early from a break; however, it allows the manager to make a decision as to any needed corrective action on a per break basis. Upon approval, the manager then selects from a list of options from the FOH Break Options screen, to take action on the break, based on the additional options you select.

Required Options: 1) You must select 'Manager must approve an early return from an enforced break' to enable this option. **2)** Selecting this option enables 'Keep break as punched,' 'Convert Unpaid break to Paid break,' and 'Remove the break.'

Remove break minutes when less than percent — Designates the percent threshold, if you want the system to calculate the threshold using the following calculation: $\text{threshold \%} \times \text{minimum break minutes}$. If the break minutes taken totals more than the calculated threshold, the system records the

break type and minutes as punched which might incur a break violation. If the break minutes taken totals less than the calculated threshold, the system automatically removes the break. **Required Options:** You must select 'Remove minutes when less than threshold' from the 'Early return from break options' drop-down list to enable this option.

Keep break as punched — Shows 'Keep Break as Unpaid Break' on the FOH screen that appears for a manager override. The system records the break as unpaid. **Required Options:** You must select 'Prompt manager options' from the 'Early return from break options' drop-down list to enable this option.

Convert Unpaid break to Paid break — Shows 'Convert Break into a Paid Break' on the FOH screen that appears for a manager override. The system records the break as paid at regular pay. **Required Options:** You must select 'Prompt manager options' from the 'Early return from break options' drop-down list to enable this option.

Remove the break — Shows 'Remove Break' on the FOH screen that appears for a manager override. The system removes the break completely. **Required Options:** You must select 'Prompt manager options' from the 'Early return from break options' drop-down list to enable this option.

Group bar: Clock in/Out

Enable manager clock-in report from POS terminals — Enables employees to access 'Employees on the Clock' on the FOH Reports screen. **Documented Version:** v15.1.

Disable all labor reporting — Disables printing the clock-in and clock-out chits. Also, labor figures do not appear in the Restaurant Sales report for the FOH. Use this option primarily for international operations. **Required Options:** You must select 'Enable manager clock-in report from POS terminals' to enable this option.

FOH Labor report interval minutes — Denotes the time interval (in minutes) used for calculating the FOH Labor Report. Labor costs are reported in increments of this value. **Required Options:** You must select 'Enable manager clock-in report from POS terminals' to enable this option.

Print clock-in chit — Prints a clock-in chit for each employee. **Related Options:** To disable printing clock-in chits, select 'Disable all labor reporting.'

Print schedule on clock-out chit — Enables the system to automatically print employee schedules on the clock-out chit when the employee clocks out. **Related Requirements:** You must configure labor schedules in Basic labor scheduler, NCR Aloha Labor Scheduler, or NCR Back Office Labor to use this option.

Restrict to select labor group — Limits printing employee schedules on the clock-out chit to a labor group. Use this option if you want to enable automatic printing only for a group of job codes, such as employees who work only in the kitchen. **Required Options:** You must select 'Print schedule on clock-out chit' to enable this option.

Number of weeks to print — Specifies the number of scheduled weeks to automatically print on the clock-out chit. **Required Options:** You must select 'Print schedule on clock-out chit' to enable this option.

Clock-in rounding interval — Specifies the number of minutes to use for rounding clock-in times. When employees clock in, the system rounds the time per the number entered in this text box. For example, if you enter '5,' and the employee clocks in at 7:58, the system rounds the time to the nearest 5-minute interval, which is 8:00. Type a number from 0 to 60, with 0 to indicate no rounding.

Round clock-in upward after this many minutes — Specifies the number of minutes at which the system rounds the clock-in time. Type a number from 0 to 60, and the number must be less than the time specified in 'Clock-in rounding interval.' If set to 0, the system automatically rounds to the nearest time interval listed in 'Clock-out rounding interval.'

Clock-out rounding interval — Specifies the number of minutes to use for rounding clock-out times. When employees clock out, the system rounds the time per the number entered in this text box. For example, if you enter '5,' and the employee clocks out at 7:58, the system rounds the time to the nearest 5-minute interval, which is 8:00. Type a number from 0 to 60, with 0 to indicate no rounding.

Round clock-out downward before this many minutes — Specifies the number of minutes at which the system rounds the clock out time. Type a number from 0 to 60, and the number must be less than the time specified in 'Clock-out rounding interval.' If set to 0, the system automatically rounds to the nearest time interval listed in 'Clock-out rounding interval.'

No period to date hours on clock-out chit — Suppresses the period to date (PTD) hours on the clock-out chit.

Print period to date tips — Prints the day part and charged tips on the employee checkout. The sales for the current day and the percentage of sales also appear.

Number of minutes after clock out employee can earn sales and tips ... — Designates the number of minutes after a team member clocks out within which you must close an open team check for the clocked-out team member to still be eligible for automatic distribution of those sales and tips. For example, '15' for 15 minutes. If set to '0,' the system automatically removes the employee from the team and does not automatically distribute any sales and tips of existing open team checks at the time of clocking out to the team employee. **Documented Version:** v14.1.

Group bar: Overtime

Enable daily overtime — Specifies the employee earns a higher overtime pay rate based on daily hours worked over the normal hours per day vs. weekly hours worked over the normal hours per week. **Related Options:** Selecting this option enables 'Maximum hours per day before daily overtime rate,' 'Daily overtime rate multiplier,' and 'Enable second daily overtime.'

Maximum hours per day before daily overtime rate — Denotes the number of hours an employee must work in a single day before earning overtime pay. The value specified here must be less than the value in 'Maximum hours per day before second daily overtime rate.' **Required Options:** You must select 'Enable daily overtime' to enable this option.

Daily overtime rate multiplier — Indicates the number by which the system multiplies the employee pay rate, to determine the appropriate overtime pay, when an employee exceeds the hours per day limits; typically, the rate is 1.5. **Required Options:** You must select 'Enable daily overtime' to enable this option.

Enable second daily overtime — Specifies the employee earns an even higher overtime pay rate for daily hours worked over the hours specified in 'Maximum hours per day before second daily overtime rate.' **Related Options:** Selecting this option enables 'Maximum hours per day before second daily overtime rate,' and 'Second daily overtime rate multiplier.'

Maximum hours per day before second daily overtime rate — Denotes the number of hours an employee must work per day before meeting the second daily overtime rate requirement. The value specified here must be greater than the value in 'Maximum hours per day before daily overtime rate.' **Required Options:** You must select 'Enable second daily overtime' to enable this option.

Second daily overtime rate multiplier — Indicates the number by which the system multiplies the employee pay rate, to determine the appropriate overtime pay, when an employee meets the second daily overtime rate requirement; typically, the rate is 2.0. **Required Options:** You must select 'Enable second daily overtime' to enable this option.

Daily overtime depends on employee rate — Specifies that daily overtime does not apply to any employee whose pay rate is more than the amount defined in 'Daily overtime does not apply when rate is greater than' text box. **Required Options:** You must select 'Enable daily overtime' or 'Enable second daily overtime' to enable this option.

Daily overtime does not apply when rate is greater than — Denotes the pay rate at which an employee whose pay rate is equal to or greater than this amount is ineligible to receive daily overtime pay.

Daily overtime starts with first clock-in — Uses the last clock-in time for an employee to begin a 24-hour work day, instead of using the system date-of-business, when calculating daily overtime. For example, if an employee clocks in at 1:00 p.m. on Tuesday, the work day starts at 1:00 p.m. and con-

tinues until 12:59 p.m. on Wednesday, even if the employee clocks in again within that 24-hour time frame. **Related Options:** Selecting this option enables 'Allowed minutes between contiguous shifts crossing end of day.'

Allowed minutes between contiguous shifts crossing end of day — Designates how many minutes can lapse between two shifts, one occurring before the End-of-Day process and one after the End-of-Day process, to consider the two shifts as one continuous shift. The default value is '5.' The system handles shifts crossing two business days correctly through carryover; however, if a manager uses Edit Punches to manually add a shift or edit the last shift before the EOD or the first shift right after the EOD, the value entered here determines whether the system connects and considers both shifts as one shift. **Required Options:** You must select 'Daily overtime starts with first clock-in' to enable this option.

Enable weekly overtime — Enables overtime earned on a weekly basis. **Related Options:** Selecting this option enables 'Maximum hours per week before weekly overtime rate,' and 'Weekly overtime rate multiplier.'

Maximum hours per week before weekly overtime rate — Denotes the number of hours an employee can work per week before going into overtime. This is typically set to 40. **Required Options:** You must select 'Enable weekly overtime' to enable this option.

Weekly overtime rate multiplier — Indicates the number by which the employee pay rate is multiplied, to determine the appropriate overtime pay when an employee's hours exceed the hours per week limits. Typically, the rate is 1.5. **Required Options:** You must select 'Enable weekly overtime' to enable this option.

Enable 7th day overtime — Enables overtime requirements for the seventh day an employee works in a pay period. **Related Options:** Selecting this option enables 'Maximum hours on 7th day before 7th day overtime rate,' '7th day overtime rate multiplier,' and 'Enable extended 7th day overtime.'

Maximum hours on 7th day before 7th day overtime rate — Denotes the number of hours an employee can work on the 7th consecutive day worked before going into overtime, if applicable. The 'Maximum hours on 7th day before second 7th day overtime rate' text box must be greater than or equal to the number of hours set for this option. Employees receive overtime pay for the 7th consecutive day worked, regardless of the number of hours worked that same week. After a defined number of hours are worked on the 7th consecutive day, employees can receive additional overtime pay. **Required Options:** You must select 'Enable 7th day overtime' to enable this option.

7th day overtime rate multiplier — Indicates the number by which the employee pay rate is multiplied, to determine the appropriate overtime pay when an employee's hours exceed the 7th day limits. **Required Options:** You must select 'Enable 7th day overtime' to enable this option.

For example, an employee who worked five hours a day for seven days, and using 1.5 as the overtime multiplier rate, the overtime calculates as follows:

Number of Hours	Rate of Pay	Overtime Rate	Total Pay
30.0 hours	\$5.00		\$150.00
5.0 hours	\$7.50	1.5	\$37.50

If that same employee worked 10 hours on the 7th consecutive day worked, using 2.0 as the additional overtime multiplier rate, the overtime calculates as follows:

Number of Hours	Rate of Pay	Overtime Rate	Total Pay
30.0 hours	\$5.00		\$150.00
8.0 hours	\$7.50	1.5	\$60.00
2.0 hours	\$10.00	2.0	\$20.00

Enable extended 7th day overtime — Enables overtime requirements for when an employee works longer than the hours required for 7th day overtime, within a pay period. **Required Options:** You must select 'Enable 7th day overtime' to enable this option.

Maximum hours on 7th day before second 7th day overtime rate — Denotes the number of hours an employee can work per day before meeting the second 7th day overtime rate requirement. The number of hours for this option must be greater than, or equal to, the 'Maximum hours on 7th day before 7th day overtime rate' option. **Required Options:** You must select 'Enable extended 7th day overtime' to enable this option.

Second 7th day overtime rate multiplier — Indicates the number by which the employee pay rate is multiplied, to determine the appropriate overtime pay when an employee's hours meet the second 7th day overtime rate requirement. **Required Options:** You must select 'Enable extended 7th day overtime' to enable this option.

Calculate overtime based on — Indicates the type of rate on which you want to calculate overtime pay.

Shift rate — Calculates employee's overtime pay by the shift rate of the job code the employee is logged in as when overtime begins accumulating.

Average rate — Calculates overtime pay by the total pay earned for all shifts worked during the current pay period, divided by the employee's total hours worked for all shifts during the current pay period.

Minimum wage — Calculates overtime pay using the minimum wage rate defined by the system.

Include daily overtime hours in weekly overtime hours — Includes the hours earned from daily overtime in the weekly overtime calculation. Typically, daily overtime hours are counted only once as daily and are never included as weekly

Minimum daily hours to qualify for spread of hours — Specifies the minimum working hours in a single business day to qualify for a one-time penalty pay at the minimum wage defined in the system. Then type the number of hours to pay. The system records the pay as the other wage type '913 Spread of Hours Premium' in the Other Wages function.

Hours paid at minimum wage for exceeding the spread — Specifies the number of hours to pay at minimum wage when the employee qualifies for a spread of hours.

Group bar: Shifts

Use the 'Shifts' group bar to enable and set parameters for split shift and shift pay rules. If all criteria is met, the system automatically generates a pay record in Pay Adjustments when End-of-Day is run. This record is identifiable as system-generated and can either be accepted or deleted when the Pay Adjustments section is reviewed by the manager. The system generated records for shifts are:

- Split Shift Premium
- Worked < half scheduled
- No Schedule minimum
- 2nd Shift minimum

Note

In the examples, employee and employer can mutually consent to waive the second meal period, if the employee's work period of not more than twelve hours completes his day's work. Meal Break 1 rules apply and are mandatory because total continuous hours in all instances exceed the threshold of six hours.

Use shift rules — Enables you to specify the parameters to apply to the shift rules. **Related Options:** Selecting this option enables the options under the following group bars: 'Split Shifts,' 'First Shift,' and 'Second Shift.'

Caution

Check the wage and payday laws for your state to ensure your policies and procedures are in compliance.

Group bar: Shifts > Split Shifts

Use the options under the 'Split Shifts' group bar to define the rule for split shifts and paying an additional wage if an employee works a split shift. A split shift is recognized as two clock in/clock outs in one work day. The references to '1st reporting' and '2nd reporting' that follow refer to an employee's 1st shift and 2nd shift. **Required Options:** You must select 'Use shift rules' to enable this group bar and these options.

Number of hours to be added as a pay adjustment — Represents the number of hours added as pay adjustments if the employee has worked one shift and works a second shift in one work day. Valid entries are from 1.00 to 24.00.

Pay rate to use for the pay adjustment — Represents the rate of pay if the employee works a split shift. 'Minimum Wage' is an option. If you select 'Regular Pay,' the rate is for the job worked on the first shift.



Tip

You set the minimum wage rate in Maintenance > Business > Store > Store Settings tab > Labor group under the 'Employee settings' group bar.

The following table shows examples of results generated by criteria you may set for split shifts:

Criteria:	
Pay one hour at minimum pay rate.	
Scenario:	Result:
Bob works first shift as a cook for three hours at \$10 hour, and second shift as a dishwasher for two hours at \$6 an hour.	Bob gets paid three hours times \$10, plus two hours times \$6, plus one hour times minimum wage. The extra hour pay does not count toward overtime. The system generates a Pay Adjustments entry as 'System-Split Shift Premium.'
Criteria:	
Pay one hour at regular pay rate.	
Scenario:	Result:
Bob works first shift as a cook for three hours at \$10 hour, and second shift as a dishwasher for two hours for \$6 an hour.	Bob gets paid three hours times \$10, plus two hours times \$6, plus one hour times \$10.00, since his regular pay for first shift is \$10.00. The extra hour pay does not count toward overtime. The system generates a Pay Adjustments entry as 'System-Split Shift Premium.'

Group bar: Shifts > First Shift

The first shift reporting rule is that if an employee works less than half the scheduled hours, the employee pay for half the scheduled hours at the regular rate of pay. When this condition is met, the system generates a Pay Adjustments entry with the wage type 'System - Worked < half scheduled.'

Required Options: You must select 'Use shift rules' under the 'Shifts' group bar on this tab to enable this group bar and these options.

Minimum hours to add for working less than half of scheduled shift — Represents the minimum number of hours to add as Pay Adjustments, if the employee works less than half their scheduled hours on first reporting. Valid entries range from 1.00 to 24.00.

Maximum hours to add for working less than half of scheduled shift — Represents the maximum number of hours to add as Pay Adjustments, if the employee works less than half their scheduled hours on first reporting. Valid entries range from 1.00 to 24.00. This value cannot be less than the minimum value.

Pay rate to use for pay adjustment — Represents the employee pay rate. The default value is regular pay. 'Minimum Wage' is an option.

The following table shows examples of results generated by criteria you may set for split *first* shifts:

Criteria:	
Pay two hours minimum and four hours maximum at regular pay rate.	
Scenario:	Result:
Bob is scheduled to work four hours, but works three hours.	Bob gets paid for actual hours worked, because he worked more than half his scheduled shift.
Bob is scheduled to work six hours, but works two and a half hours.	Bob gets paid for his actual hours worked, plus three additional hours, for a total of five and a half hours. The three hours is because he was scheduled for six hours, half of which is three. He received the three hours pay because he did not work at least that many. The system generates a Pay Adjustments entry as 'System Worked < half scheduled.'
Bob is scheduled to work four hours, but works one and three quarters hours.	Bob gets paid for his actual hours worked, plus 2 hours for working less than half his scheduled shift, for a total of 3.75 hours. The system generates a Pay Adjustments entry as 'System Worked < half scheduled.'

Minimum hours to add for working with no schedule — Represents the minimum hour(s) to pay if the employee is not scheduled to work. Valid entries range from 1.00 to 24.00.

The following table shows examples of results generated by criteria you may set for split shifts:

Criteria:	
System is set to pay two hours minimum, four hours maximum at regular pay rate, but the employee does not have a schedule.	
Scenario:	Result:
Bob is not scheduled and works four hours.	Bob gets paid four hours at the job code rate.
Bob is not scheduled and works six hours.	Bob gets paid six hours at the job code rate.
Bob is not scheduled and works three hours.	Bob gets paid three hours at the job code rate, plus two additional system generated hours at the job code rate. The system generates a Pay Adjustments entry as 'System-No schedule minimum.'

Group bar: Shifts > Second Shift

'Use shift rules' under the 'Shifts' group bar on this tab to enable this group bar and these options.

Minimum hours to be eligible for working on second shift — Represents the threshold number of hours the employee must work less than on second shift to be eligible for additional pay. Valid entries range from 1.00 to 24.00.

Hours to add for working short second shift — Represents the number of hours to add to Pay Adjustments if the employee works less than the threshold hours on second shift. Valid entries range from 1.00 to 24.00.

Pay rate to use for second shift pay adjustment — Represents pay rate for additional hours, if employee is not allowed the set number of hours on his second shift. The default is the regular rate of pay. 'Minimum Wage' is an option.

The following table shows examples of results generated by criteria you may set for split *second* shifts:

Criteria:	
Employee works second shift less than two hours. Pay two hours at minimum pay rate or regular rate.	
Scenario:	Result:
Bob returns for his second shift. He clocks in and is immediately sent home.	Bob gets paid actual time worked plus two hours either minimum wage or regular rate. The system generates a Pay Adjustments entry as 'System- 2nd Shift minimum.'
Bob returns for his second shift. He works an hour and a half and is sent home.	Bob gets paid the one and a half he worked plus two hours at either minimum wage or his regular rate. The system generates a Pay Adjustments entry as 'System- 2nd Shift minimum.'
Bob returns for his second shift. He works three hours and is sent home.	Bob gets paid his actual hours worked only since he worked more than the threshold.

Financials Group

Use the Financials group to establish policies and procedures for financial aspects of your business that apply to the entire restaurant. The options in the Financials group allow you to define:

- Secondary tax and surcharge requirements.
- Report requirements, such as if net sales includes comps or promotions, if gross sales includes voided sales, and the minimum tip percentage all employees must tip.
- Prompts to remind the cashier to make cash drops.
- The method with which you can search house accounts.
- Either a flat charge or a percentage to apply to the guest check.

Group bar: Taxes

Enable Secondary taxes — Enables the use of secondary taxes by the system. **Related Requirements:** Access Maintenance > Taxes > Tax Types to define secondary taxes and then assign secondary taxes to items in Maintenance > Menu > Items.

Subtract inclusive taxes when Tax Exempt — Removes inclusive taxes from the item price, when the check is tax exempt.

Rounding rules for primary and secondary taxes — Specifies rounding rules to apply to taxes. This allows you to define rounding based on regional regulations. Valid choices are 'System default,' 'Round up,' and 'Round down.' **Documented Version:** v12.3.

Exempt inclusive tax item indicator — Denotes the character or text to appear on the printed receipt to indicate the inclusive tax was backed out of the price, when the check is tax exempt.

Required Options: You must select 'Subtract inclusive taxes when Tax Exempt' to enable this option.

Exclude inclusive primary tax from exclusive secondary tax — Calculates the secondary tax using the base price of the item, not the price after adding the exclusive tax.

Display exempted tax amount on check — Indicates the amount of inclusive or exclusive tax removed when you apply a tax exemption on the on-screen and printed guest check. **Documented Version:** v12.3.

Show tax details on screen — Enables different taxes to appear as separate line items on screen.

Group bar: Goods and services tax (GST)

A GST tax charges a certain percentage on the sale of all goods and services; however, you can exempt certain items from the GST tax, as allowed. You apply the GST tax at the item level, and after other taxes are applied to the guest check. For example, if the guest check subtotal for a single item, such as a sandwich, is \$5 and the primary tax applied is 5%, the new subtotal is \$5.25. If a GST tax of 3% is in effect, the system calculates the tax against the new subtotal (\$5.25), which brings the guest check total to \$5.40.

Goods and services tax — Designates the tax record corresponding to the GST tax in effect in your area. **Required Options:** You must select 'Apply Additional Charges' under the 'Additional charges' group bar on this same tab to expose this option. Leave the default value for 'Additional Charge method' as None. **Related Options:** Selecting this option enables 'Print GST text on receipt.' **Related Requirements:** Access Maintenance > Menu > Tax Types, select either the inclusive or exclusive GST tax record supplied by the POS system, and change the percentage, if needed.

Apply GST to comp amount — Calculates the GST tax on the ala carte price of the items in the comp, rather than the price after applying the discount.

Apply GST to promo discount — Calculates the GST tax on the original (ala carte) price of the items in the promotion, rather than the price after applying discount.

Print tax invoice for totals over this amount — The amount above which the GST tax applies to the guest check. Type a currency amount in the text box.

Category of items to exempt from GST — Determines the category of items that are exempt from the GST tax, if any.

Print GST text on receipt — Indicates you want a message to appear on the guest check, when a GST tax is applied. **Related Options:** Selecting this option enables 'GST text to print on receipt.' **Required Options:** You must select 'Goods and services tax' to enable this option.

GST text to print on receipt — Prints a message on the guest check, in response to application of the GST tax. Type the message in the text box. Type a maximum of 20 characters. **Required Options:** You must select 'Print GST text on receipt' to enable this option.

Group bar: Surcharge

Enable Surcharges — Activates surcharges in the system and applies them to the designated menu items. **Related Options:** Selecting this option enables all other options under the 'Surcharge' group bar.

Surcharge text — Specifies the text to appear on guest checks when 'Enable Surcharges' is selected. If cleared, the surcharge text appears as 'Surcharge 1,' 'Surcharge 2,' etc. Type a maximum of 20 characters. **Required Options:** You must select 'Enable Surcharges' to enable this option.

Guest pays surcharge — Applies surcharges to designated menu items and includes them on guest checks. **Related Options:** Selecting this option disables the 'Enable Smart Surcharges' option.

Enable Smart Surcharges — Adds exclusive surcharges only if there are exclusive taxable items on the check. If there are no exclusive taxable items, the Surcharge line does not appear on the check. **Related Options:** Selecting this option disables the 'Guest pays surcharge' option.

Display all surcharges on one line — Combines all surcharges into a single entry on guest checks. If cleared, surcharges are listed separately each time they are applied.

Apply surcharge to zero-priced items — Includes zero priced items in surcharge calculations.

Apply surcharge to voided items not returned to inventory — Includes voided items in surcharge calculations.

Apply surcharge to discounted items — Includes comps and promotions in surcharge calculations.

Group bar: Reports

Exclude voided items from gross sales — Does not include sales from voids in the gross sales calculations.

Include promos discounts in gross sales — Includes sales which were discounted with a promotion in the gross sales.

Include comps in net sales — Includes sales which were discounted with a comp in the net sales.

Include promos discounts in net sales — Includes sales which were discounted with a promotion in the net sales.

Exclude open sales from BOH reports — Does not include sales entered with the open item function on the BOH reports.

Include modifiers on FOH Product Mix report — Includes all defined modifiers on the FOH Product Mix (PMIX) report. If cleared, modifiers do not appear on the report. **Documented Version:** v12.3.

Exclude zero-priced modifiers on FOH Product Mix report — Omits unpriced modifiers from the FOH Product Mix (PMIX) report. **Required Options:** You must select 'Include modifiers on FOH Product Mix report' to enable this option. **Documented Version:** v12.3.

Exclude 100% comp checks from guest and check counts — Does not include checks in which a comp took the amount to \$0.00, when calculating check and guest counts totals.

Display FOH labor hours format — Indicates the format you want to use for showing labor hours and minutes on FOH reports for Clock In/Out times and the Labor report.

Minute — Controls display of hours and minutes on FOH reports for Clock In/Out Times and the Labor report. If cleared, the hours appear in a decimal, or hundredths, format. If selected, the times appear in hours and minutes, or HH:MM.

Decimal — Controls display of hours and minutes on the clock in/clock out chit. If selected, times and totals print in the HH:MM format *and* in hundredths, or decimals.

Print both minute and decimal formats on timeclock chits — Prints the clock-in/out chit with HH:MM and decimal format.

Report non-cash tenders by terminal revenue center — Always reports non-cash payments to revenue centers attached to the terminal, even if you have attached a revenue center by an order mode or by a table.

Tip breakdown prints on clock out chit — Prints a tip breakdown section, such as the tip rate%, total charge sales and tip rate, total cash tips and tip rate, and more, at the bottom of the clock out chit. **Related Options:** The tip breakdown appears on the clock out chit for an employee clocked in under a job code with 'Order entry' selected.

Clock out chit footer message — Prints a defined guest check message as a footer at the bottom of the clock out chit. Select '00000 None' to disable the feature.

Default minimum declared tip percentage — Specifies the percentage to use when determining if an employee's declared tips are too low. The employee receives only one chance to enter their declared tips at the right percentage. If the amount is too low, a warning message displays. If the wrong amount is accepted, the manager must delete the clock out for the employee to enable them to try again.

Do not round balance due before tender applied — Prevents the system from performing rounding on the balance due to the guest until a tender is applied to the check. This more commonly applies to sites located outside of the United States of America. **Required Options:** Configure tender rounding in Maintenance > Payments > Tenders > Rounding tab.

Disable configured rounding for payable amount less than .05 — Does not round a check total that is less than five cents, when the remainder of the check after applying non-cash tenders is paid with cash. For example, when a \$20.00 meal voucher is applied to a \$20.04 check total, and you then pay cash, the system does not round the remaining four cents. This option overrides any five-cent rounding configured for a tender in the Tenders function. **Documented Version:** v19.11.

Group bar: Cash Drops

Cash drawer amount for initial cash drop prompt — Designates the amount that must be in the drawer to initiate the first message prompt for a cash drop. Once the dollar amount of cash owed reaches this amount for the first time in a shift, the system prompts the employee to perform a cash drop. They can either perform a drop or continue operating without a drop until the amount in the drawer reaches the specified amount for a subsequent prompt.

Incremental amount for cash drop reminder beyond initial amount — Determines the amount that must be in the drawer to display subsequent message prompts for a cash drop. This number must be greater than the number entered in the 'Cash drawer amount for initial cash drop prompt' text box.

Cash drawer amount at which cash drop is required — Designates the amount that must be in the drawer to display a message prompt for a required cash drop. When the amount of cash in the drawer reaches this amount, the employee cannot continue operations until they make a drop. This number must be greater than the numbers entered in the 'Cash drawer amount for initial cash drop prompt' and 'Incremental amount for cash drop reminder beyond initial amount' text boxes.

Manager approval required for cash drop — Displays the manager approval screen when you are prompted to perform a cash drop from the FOH. **Required Options 1)** You must type a value higher than 0.00 in the corresponding text boxes to enable the 'Prompt for Cash Drop' feature. **2)** To allow an employee to approve cash drops, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Approve cash drop' under the 'Financial' group bar, and assign the access level to the employee.

Self-banking amount for initial cash drop prompt — Designates the amount that must be in the employee bank to initiate the first message prompt for a cash drop. Once the dollar amount of cash owed reaches this amount for the first time in a shift, the system prompts the employee to perform a cash drop. They can either perform a drop or continue operating without a drop until the amount in the drawer reaches the specified amount for a subsequent prompt.

Incremental cash drop reminder for self-banking beyond initial amount — Determines the amount that must be in the employee bank to display subsequent message prompts for a cash drop. This number must be greater than the number entered in the 'Cash drawer amount for initial cash drop prompt' text box.

Self-banking amount at which cash drop is required — Designates the amount that must be in the employee bank to display a message prompt for a required cash drop. When the amount of cash in the drawer reaches this amount, the employee cannot continue operations until they make a drop. This number must be greater than the numbers entered in the 'Cash drawer amount for initial cash drop prompt' and 'Incremental amount for cash drop reminder beyond initial amount' text boxes.

Group bar: Automatic Deposits

Number of description fields — Specifies whether to show one or two prompts for a deposit description. Selecting '2' enables the 'Field 2 text,' 'Length for field 2 text,' 'Field 2 is numeric,' 'Field 2 is required,' and 'Field 2 prompt for deposit reason' options.

Field 1 text — Denotes the first text string to appear on the FOH deposit declaration screen and the Edit Deposit Entry dialog box in Functions > Edit Deposits. **Required Options:** You must select at least '1' or '2' from 'Number of description fields' to enable this option.

Field 2 text — Denotes the second text string to appear on the FOH deposit declaration screen and the Edit Deposit Entry dialog box in Functions > Edit Deposits. **Required Options:** You must select at least '2' from 'Number of description fields' to enable this option.

Length for field 1 text — Specifies the number of characters, up to 30, you can add for the corresponding field 1 description. **Required Options:** You must select at least '1' or '2' from 'Number of description fields' to enable this option.

Length for field 2 text — Specifies the number of characters, up to 30, you can add for the corresponding field 2 description. **Required Options:** You must select at least '2' from 'Number of description fields' to enable this option.

Field 1 is numeric — Specifies whether you must enter numbers only for the corresponding field 1 description.

Field 2 is numeric — Specifies whether you must enter numbers only for the corresponding field 2 description. **Required Options:** You must select at least '2' from 'Number of description fields' to enable this option.

Field 1 is required — Indicates field 1 is mandatory.

Field 2 is required — Indicates field 2 is mandatory. **Required Options:** You must select at least '2' from 'Number of description fields' to enable this option.

Field 1 prompt for deposit reason — Displays the Deposit Reason screen so you can enter a description for deposit 1.

Field 2 prompt for deposit reason — Displays the Deposit Reason screen so you can enter a description for deposit 2. **Required Options:** You must select at least '2' from 'Number of description fields' to enable this option.

Maximum amount per deposit — Specifies the maximum amount you can enter for a deposit, up to \$999,999.99. When the reconciled amount exceeds the maximum amount, the deposits are broken out separately.

Automatically generate deposit from declared tenders — Enables you to automatically transfer the reconciled amount to a deposit. **Required Options:** If you are using Employee Reconciliation, you must access Maintenance > Labor > Jobcodes > Financial tab and select 'Reconcile payments at checkout' under the 'Financial' group bar. If you are using Drawer Reconciliation, you must access Maintenance > Hardware > Cash Drawers > Cash Drawer tab and select 'Perform drawer reconciliation' under the 'Settings' group bar.

Always display the deposit distribution screen — Displays the Distribution screen, always, after you perform a reconciliation. This allows you to add and edit deposits, regardless of the maximum deposit amount value.

Group bar: House account

House account lookup method — Indicates the method you use to look up a house account record.

Account number — Searches for house accounts by account number.

Account name — Searches for house accounts by the account name.

Account number, then account name — Searches for house accounts by the account number, then if nothing is found, searches for the account name.

Group bar: Additional charges

Apply Additional Charges — Enables additional charges to be applied automatically to the guest check per the defined criteria. Once selected, the system checks for an inclusive GST tax in use, and once found, disables both the 'Apply to comp amounts' and 'Apply to promo discount amounts' text boxes and adds additional charges to the full item prices. In addition, the system disables the 'Charge amount' text box so that you may not use a flat rate for the additional charge. If 'Apply additional charges' is cleared, the additional charge does not appear on FOH or BOH reports.

Name — Indicates the name of the additional charge. Type a maximum of 20 characters.

Text — Determines the text to print on the guest check when the additional charge is added. For example, you may want 'Service Charge' printed on the guest check, rather than 'Additional Charge.'

Additional Charge method — Defines whether the additional charge uses an amount or a percentage rate.

Charge amount — Displays a numeric value which represents the flat charge the system automatically adds to each guest check. The default value is 00000.00. **Required Options:** You must select 'Amount' as the 'Additional Charge method' to enable this option.

Charge percent — Displays a numeric value which represents the multiplier used in concert with the subtotal on the guest check. The default is 00.0000. **Required Options:** You must select 'Percent' as the 'Additional charge method' to enable this option.

Apply to promo discount amounts — Indicates whether the additional charge is applied to promo(s). If selected, the additional charge is applied to the subtotal of the guest check including the amount of the promo(s). **Required Options:** You must select 'Apply Additional Charges' to enable this option.

Apply to comp amounts — Indicates whether the system applies the additional charge to comp(s). If selected, the system applies the additional charge to the subtotal of the guest check, including the amount of the comp(s). **Required Options:** You must select 'Apply Additional Charges' to enable this option.

Print on reports — Enables you to report additional charges on the FOH and BOH Sales and Sales by Revenue Center reports. **Required Options:** You must select 'Apply Additional Charges' to enable this option.

Display additional charge — Shows any additional charges on the FOH order entry screen. **Required Options:** You must select 'Apply Additional Charges' to enable this option.

Category of items to exclude from additional charges — Designates a category to *exempt* from the additional charge.

Check Printing group

Use the Check Printing group to set up various styles and content for printing, excluding chit printing and report printing, for the whole restaurant. The options in the Check Printing group allow you to define:

- What prints on the guest check, such as the grand total, signature lines with messages, and user-defined text to replace the Tip line.
- A slip to print for logging comp reasons, when you apply a comp.
- Other requirements you need to print on the guest check, such as consolidation, the revenue center, the bar code, and the day part.

- Store-wide numbering that prints and numbers all checks in the sequence in which you begin ordering, regardless of revenue center numbering.
- The line space to leave at the top and the bottom of the guest check for proper alignment and centering.
- Large fonts to print on the guest check, if desired.
- An extra check stub for the guest to hand to a cashier upon exiting, such as in a wait-staff cafeteria environment.
- The requirements for printing the checkout report, such as including the check count, non-cash tenders, and period to date (PTD) tips.
- A custom checkout report to print with the standard FOH checkout report, or replace the entire FOH checkout report with custom information.
- The hourly threshold for the FOH Break Alert report.

Group bar: Guest Check Content

Print business number — Prints the business or ID number on the guest check.

Print Order Mode — Prints the order mode on the left side of the guest check with the heading of Order Type.

Print Revenue Center — Prints the revenue center on the guest check.

Print Daypart — Prints the day part on the left side of the guest check with the heading of DAY PART.

Use store-wide order numbering — Activates the Store Wide Order Numbering functionality. Use this feature to systematically number all checks, across all queues. When you clear this option, guest checks are numbered as defined in Maintenance > System Settings > Order Entry Queues. **Related Options:** Selecting this option enables 'Minimum order number,' and 'Maximum order number.'

Minimum order number — Specifies the minimum order number to assign to a guest check. This is the starting order number at the beginning of each business day. **Required Options:** You must select 'Use store-wide order numbering' to enable this option.

Maximum order number — Specifies the maximum order number to assign to a guest check. **Required Options:** You must select 'Use store-wide order numbering' to enable this option.

Do not print check number — Does not print the check number on the guest check. When you clear this option, the check number prints on the right side of the guest check.

Print header on open guest check — Enables you to configure text, to print in the header, to indicate a guest check is open. This meets the legal requirements for International countries, such as Columbia. **Related Options:** Selecting this option enables the 'Text' option.

Text — Indicates the exact text to appear in the header for open guest checks. If you leave this blank, the system does not print a header. **Required Options:** You must select 'Print header on open guest check' to enable this option.

Printer header on closed guest check — Enables you to configure text, to print in the header, to indicate a guest check is closed. This meets the legal requirements for International countries, such as Columbia. **Related Options:** Selecting this option enables the 'Text' option.

Text — Indicates the exact text to appear in the header for closed guest checks. If you leave this blank, the system does not print a header. **Required Options:** You must select 'Print header on closed guest check' to enable this option.

Do not print voided items — Suppresses voided items from printing on the guest check. If cleared, voided items printed on the check, along with the word 'VOIDED' and a negative amount.

Consolidate identical items — Combines like items on the guest check, such as the format of (2 at 5.00). If cleared, like items appear separately.

Print non-taxable comps and promos above subtotal — Prints comp and promo information before the subtotal.

Item count text — Specifies the text to print before the item count number on the guest check, for example, 'Item Number.' Type a maximum of 20 characters. **Required Options:** You must select 'Print item count before subtotal' to enable this option.

Put the quantity in front of the item name if more than one — Prints the quantity of the item ordered before the item name on the guest check, such as 2 Hamburger (@ 2.50). This does not apply to quantity priced items.

Print item count before subtotal — Displays the total number of items (item count) before the subtotal amount on the printed and on-screen guest check. The total does not include modifiers or quick combo components. You must order at least one item before the item count updates.

Include quick combo components in item count — Enables the system to count each component within a quick combo in the item count. When cleared, the system treats the entire quick combo as one item. **Related Options:** To exclude a quick combo component from the item count, access Maintenance > Payments > Promotions > Components QS tab and select 'Exclude from item count' under the 'Components' group barfor that quick combo component. **Documented Version:** v12.3.

Print tax detail — Prints and separates taxes by ID number on the guest check. **Related Options:** This option enables the 'Print total tax line' option.

Print total tax line — Prints a total of the detailed taxes below the tax detail on the guest check. **Related Options:** You must select 'Print tax detail' to enable this option.

The following sample guest checks illustrate the tax detail print options. The guest check on the left printed with 'Print tax detail' selected, and shows detail for food and alcohol taxes. The guest check on the right printed with 'Print tax detail' and 'Print total tax line' selected, and shows the same detail as the one on the left, with an additional line for the total of the two taxes.

Sample Restaurant		Sample Restaurant	
Server: Aloha	01/03/2000	Server: Aloha	01/03/2000
Table 12/1	10:04 AM	Table 12/1	10:04 AM
Guests: 8	10014	Guests: 8	10014
T-Bone Steak	16.95	T-Bone Steak	16.95
Cherry Jubilee	4.75	Cherry Jubilee	4.75
Margarita	4.25	Margarita	4.25
Michelob	3.50	Michelob	3.50
Subtotal	29.45	Subtotal	29.45
Food Tax	1.63	Food Tax	1.63
Alcohol Tax	.74	Alcohol Tax	.74
Total	31.82	Total Tax	2.37
		Total	31.82
Thank You		Thank You	

Figure 4 - 13 Sample Guest Checks with Tax Detail

Do not print tax line if tax is zero — Omits printing a tax line on the guest check if the total amount of tax on the check is zero.

Print total in all currencies — Enables the guest check total to print in all currencies in use.

Print a grand total — Enables the grand total, including the total and tips, to print on the closed guest check.

Print sales category totals — Prints sales category totals (subtotal and grand total) for each category that is rung up.

Reflect sales category totals at amount sold — Prints the total sales for each affected sales category at the amount at which the items were sold to the guest rather than the base price of the items before applying any discounts. If cleared, the totals do not reflect any discounts. **Required Options:** You must select 'Print sales category totals' to enable this option.

Print Hotel PMS guest name — Prints the name of the guest on guest checks to which you apply the PMS tender as payment. **Related Requirements:** Access Maintenance > Payments > Tenders and create a tender of the 'Property management' type for applying payments to a guest check for a hotel guests.

Print room number and guest name lines — Prints the room number and guest name lines on guest checks to which you apply the PMS tender as payment. The guest can fill in this information when charging a meal to the room. **Related Requirements:** Access Maintenance > Payments > Tenders and create a tender of the 'Property management' type for applying payments to a guest check for a hotel guests.



Reference

Refer to the Aloha PMS Integration Guide for more information.

Print barcode for guest check — Prints the bar code on the guest check. Typically, you use this in a cashier environment where the guest takes the check to the cashier and the cashier scans the check to access it with the Get Check functionality.

Print barcode below each item on guest check — Enables the system to print a bar code below every item listed on a guest check that has a SKU number configured. If you have more than one SKU number for an item, the system prints the first available SKU number. Voided items and refunds appear on the guest check without the accompanying bar codes. **Required Options:** Access Maintenance > Menu > Items > SKU Numbers tab to define a SKU number for each item.

Documented Version: v14.1.

Print total, tip and signature line on all checks — Adds the Total, Tip, and Signature lines to the guest check. **Related Options:** Selecting this option enables 'Custom tip text line 1,' and 'Custom tip text line 2.'

Custom tip text line 1 — Indicates the first line of text to appear before the tip line, on the guest check. **Required Options:** You must select 'Print total, tip and signature line on all checks' to enable this option.

Custom tip text line 2 — Indicates the second line of text you want to appear before the tip line, on the guest check. **Required Options:** You must select 'Print total, tip and signature line on all checks' to enable this option.

Comp and Promo tax replacement text — Replaces the default text used to indicate inclusive taxes collected from the guest for items discounted due to an applied comp or promotion. The text appears on the guest check, checkout reports, and sales report. If cleared, the system uses the text 'Discount Tax.' **Required Options: 1)** To use this option with comps, you must access Maintenance > Payments > Comps > Taxes tab and select 'Guest pays tax' and clear 'Exclude inclusive tax' under the 'Taxes' group bar. **2)** To use this option with promotions, you must access Maintenance > Payments > Promotions > Taxes tab and select 'Guest pays tax' and clear 'Exclude inclusive tax' under the 'Taxes' group bar. 'Exclude inclusive tax' appears when you select 'Guest pays tax.'

Print cash drawer serial number — Prints the cash drawer serial number on top of the cash in/out chit.

Use international EAN barcode format — Indicates your system supports International (EAN) bar codes and prints the weight on the bar code on the guest check.

Path to the application or batch file used to process guest check output files — Specifies the exact location of the application or batch file used to process guest check output files. An example path might be: C:\Aloha\Checks\ACPrint.exe.

Field separator used in the guest check output file — Specifies the character to use as a separator. If this option is blank, the system defaults to “,”.

Disable check printing — Suppresses checks from printing during normal behavior.

Number of guest check copies to automatically print — Indicates the number of checks to print automatically.

Do not print voided items on reprints — Indicates you do not want to include voided items when you reprint a check.

Printer bitmap — Prints a custom bitmap, such as a logo, on each printed guest check.

Printer bitmap size — Specifies whether the bitmap prints normal-sized, or stretched. Valid options include: ‘Normal,’ ‘Stretch horizontally and vertically,’ ‘Stretch vertically,’ and ‘Stretch horizontally.’

Printer bitmap justification — Specifies whether the bitmap prints left-aligned, right-aligned, or centered horizontally on the guest check.

Print original check number on quick refund check — When performing a refund using the Quick Refund button, the original check number appears as a reference on the refund check. **Documented Version:** v19.3.

Print large QR code on check — Allows QR codes with more than 180 characters to print on the guest check for supported Windows printers. **Required Options: 1)** Selecting this option exposes ‘Maximum number of characters for the QR code on the guest check’ in Maintenance > Hardware > Printers. **2)** You must select a supported printer from the ‘Printers’ drop-down list in Maintenance > Hardware > Printers. **Documented Version:** v19.9.

Group bar: Guest Check Content > Comp Slips

Print custom comp chit — Enables defined information, using a text file, to print with a guest check when you apply a comp. The printed message can be different based on the applied comp. Use this for record keeping purposes in restaurants that require a manager to complete a short form for each check containing a comp.

The comp form only prints when you close the check after applying a comp to the check. Configure the comp form layout by creating a text file titled CompForm.txt in the \Data folder. Only one instance

of the comp form prints per check. For example, if you apply the same comp to a check twice, the comp form prints one time.

The system also supports multiple comp forms. Rather than have a CompForm.txt file, which prints any time you apply a comp to a check, you can configure multiple comp file forms titled, CPFnnnnn.txt, where nnnnn is the ID number of the comp. For example, if you apply comp ID 101 to a check, and CPF101.txt is found in the \Data folder, CPF101.txt prints. In the event a comp ID number does not have a corresponding comp form file, CompForm.txt prints.

Use the following rules when adding content to CompForm.txt:

- Start each line with 'MSG.' All other lines are ignored.
- Insert an '&' in the fifth text line position (MSG plus one space) to instruct the printer to perform a partial cut (if the printer is capable).
- Insert a '^' in the fifth text line to insert the system date and the check number on the left side of the form. This uses a *yyymmdd – 99999* format (for example, 20010606 – 10001).
- Insert an '@' in the fifth text line to instruct the printer to start using a large font.
- Insert a '#' in the fifth text line to instruct the printer to stop using a large font.
- If you configure the printed guest check to use the large font, then the comp form will default to the large font. You must use a '#' at the beginning of the form to default to the smaller font.
- Since the paper cutter on the printer is not at the same location as the print head, paper cuts may appear several lines above the location defined in CompForm.txt. You must experiment with your printer type and compensate for this in your comp form design.

The following is an example of a CompForm.txt file:

```

MSG &
MSG
MSG ^
MSG
MSG @
MSG          Comp Slip
MSG
MSG Restaurant: _____
MSG Shift: _____
MSG #
MSG
MSG          Check all that apply and print name
MSG
MSG ___ Customer Relations _____
MSG Explanation: _____
MSG _____
MSG _____
MSG
MSG ___ Executive Meal
MSG ___ Manager Meal
MSG ___ 50% Emp Meal
MSG
MSG -----
MSG | Date                               20
MSG -----
MSG | Description | Amount
MSG -----
MSG | Liquor      |
MSG -----
MSG | Beer        |
MSG -----
MSG | Wine        |
MSG -----
MSG | Food        |
MSG -----
MSG |              | Total
MSG -----
MSG Server      Emp#
MSG -----
MSG Customer/Employee Signature
MSG -----
MSG Manager Signature
    
```

Figure 4 - 14 Example Compform.txt file

Print slip when the comp is applied — Prints the comp form when you apply the associated comp to a check. **Required Options:** You must select 'Print custom comp chit' to enable this option.

Number of copies — Specifies the number of comp forms to print when you apply the comp to the check.

Group bar: Guest Check Content > Check Counter

Use the option under the 'Check Counter' group bar to set up the perpetual check counter function available to international sites. This function prints a perpetual check number in the top left corner of the guest check. Once set up, the counter automatically activates when you enter a guest check on a

FOH terminal. A binary file, Counter.bin, is created in the root directory (C:\) on the terminal in which the guest check is generated. This file stores all sales information.

The system tracks the following items on each terminal when the counter activates:

- The total sales generated on a terminal.
- The total number of checks generated from a sale.
- The total number of server checkouts.
- The total number of sales reports printed.



Tip

The perpetual check counter does not roll over at EOD. To reset the counter for the terminal, delete Counter.bin located in the root directory of the corresponding terminal.

Print check counter — Activates the check counter feature, which prints a unique sequential number for each check at the store. You must create a Counter.bin file, located in the root directory of the terminal, to use this feature. **Related Options:** Selecting 'Print check counter' exposes the remaining options under the 'Check Counter' group bar.

Check counter text — Specifies the text to print before the sequential number (check number) on the guest check. For example, *Check Number*. **Required Options:** You must select 'Print check counter' to expose this option.

Pad check counter with zeroes — Enables the system to print the leading zeros in the sequential number, as defined by the number of digits allowed in 'Number of Digits.' For example, if the number of digits for the check number is eight, the check number would print as 00005309. **Required Options:** You must select 'Print check counter' to expose this option.

Number of digits — Specifies the number of digits, one to 10, to allow for the check counter number. **Required Options:** You must select 'Print check counter' to expose this option.

Include Store ID — Prints the store ID with the check counter on the guest check. **Required Options:** You must select 'Print check counter' to expose this option.

Pad store ID with zeroes — Enables the system to add leading zeros to the store ID. **Required Options:** You must select 'Print check counter' and 'Include Store ID' to expose this option. **Related Options:** The 'Store number' text box in Maintenance > Business > Store > Location Information tab determines the maximum number of digits for the store ID.

Include Terminal ID — Prints the terminal ID with the check counter on the guest check. **Required Options:** You must select 'Print check counter' to expose this option.

Pad terminal ID with zeroes — Enables the system to add leading zeros to the terminal number.
Required Options: You must select 'Print check counter' to expose this option. **Related Options:** The 'Terminal number' in Maintenance > Hardware > Terminals determines the maximum number of digits for the terminal ID.

Print separator — Prints a defined character as a separator between the store ID and the terminal ID. **Required Options:** You must select 'Print check counter' to expose this option.

Separator character — Specifies the exact character to use as a separator between the store ID and the terminal ID. The default value for this option is a <space>. To exclude a separator, you must delete the space inside the text box. **Required Options:** You must select 'Print check counter' and 'Print separator' to expose this option.

Generate check counter when driver is assigned for delivery — Starts the check counter at the moment you assign the order to a driver for delivery. **Required Options:** You must select 'Print check counter' to expose this option. **Documented Version: 12.3.**

Upgrade Path: The 'Generate check counter when driver is assigned for delivery' option located in Maintenance > Business > Store > Store Settings tab > Check Printing group > 'Guest Check Content > Check Counter' group bar is now called 'Generate check counter when an action is assigned for driver,' which offers three choices, 'Default,' 'On assign driver,' and 'On dispatch driver.' Upon upgrade, 'On assign driver' is automatically selected for you.

Generate check counter when an action is assigned for driver — Generates the perpetual check counter to print on the guest check at the moment you either close the check, assign the check to a delivery driver, or dispatch the delivery driver. **Documented Version:** Effective in v19.3, we renamed this option from 'Generate check counter when driver is assigned for delivery' to 'Generate check counter when an action is assigned for driver,' and provide the available choices in a drop-down list. **Required Options:** You must select 'Print check counter' to expose this option.

Default — Assigns and prints the perpetual check counter at the moment you close the check.

On assign driver — Assigns and prints the perpetual check counter at the moment you assign the driver. If you select this option, and a guest changes their order before you dispatch the driver, the amount reported for the perpetual check ID will be different than the actual check amount.

On dispatch driver — Assigns and prints the perpetual check counter at the moment you dispatch the driver. A guest can no longer change their order after you dispatch the driver; therefore, the amount reported for the perpetual check ID and the actual check amount are the same.

Do not count reprints before check counter is assigned to check — Excludes any reprints from the check counter when they occur prior to the assignment of the order to a delivery driver. **Required Options:** You must select 'Print check counter' to expose this option. **Documented Version: 12.3.**

Group bar: Guest Check Content > Fiscal printer

Print 'X' report with checkout — Enables you to print a drawer status report, as part of the checkout process. In Aloha, if you run a drawer checkout, the system asks if you want to reset the totals. If you say no, it is essentially printing an X report. If you say yes, it is essentially printing a Z report.

Include taxes in the total on the 'Z' report — Indicates you want taxes to appear when you generate the 'Z' report.

Fiscal printing agency — Designates the governing body or agency for which to enable fiscal printing. Revenu Quebec is the only governing body available for selection at this time. **Documented Version:** v12.3.



Reference

Refer to the [Revenu Quebec Fiscal Requirements Feature Focus Guide HKS378](#) for more information.

Group bar: Guest Check Content > Tax Breakout

Do not print subtotal and tax on check — Disables printing the subtotal and tax on guest checks. Use this option with 'Use Inclusive Tax Breakout.' In European countries, only a total amount is required to print on checks.

Use inclusive tax breakout — Prints the subtotal and tax of the inclusively taxed items above the Balance Due line, and an additional tax breakout section below the Balance Due line. Valid options include: Pre Text, Tax Text, and Base Text. **Related Options:** Selecting this option enables 'Print inclusive tax breakout on check.'

Print inclusive tax breakout on check — Prints an inclusive tax breakout section at the bottom of the check. **Required Options:** You must select 'Use inclusive tax breakout' to enable this option. **Related Options:** Selecting this option enables 'Inclusive tax detail section header text,' 'Inclusive tax text,' and 'Inclusive base text.'

Inclusive tax detail section header text — Contains up to 20 characters of text, such as GST Tax, to print before the tax information in the tax breakout section below Balance Due on the guest check. **Required Options:** You must select 'Print inclusive tax breakout on check' to enable this option.

Inclusive tax text — Contains up to 20 characters of text, such as Base, to print before the tax amount in the tax breakout section below Balance Due on the guest check. **Required Options:** You must select 'Print inclusive tax breakout on check' to enable this option.

Inclusive base text — Contains up to 20 characters of text, such as IncTax, to print before the pre-tax amount of the item in the tax breakout section below Balance Due on the guest check. **Required Options:** You must select 'Print inclusive tax breakout on check' to enable this option.

Print exclusive tax breakout on check — Prints an additional exclusive tax breakout section below the Balance Due line. You configure the exclusive tax breakout section using the 'Exclusive tax text' and 'Exclusive base text' options. **Related Options:** Selecting this option enables 'Exclusive tax detail section header text,' 'Exclusive tax text,' and 'Exclusive base text.'

Exclusive Taxes				
8%	Base	6.00	Tax	0.48
5%	Base	5.00	Tax	0.25
2%	Base	14.98	Tax	0.30

Exclusive tax detail section header text — Specifies up to 20 characters of text, such as 'Tax,' to print before the tax information in the tax breakout section below Balance Due on the guest check. **Required Options:** You must select 'Print exclusive tax breakout on check' to enable this option.

Exclusive tax text — Contains up to six characters of text, such as 'Tax,' to print before the tax amount in the tax breakout section below Balance Due on the guest check. **Required Options:** You must select 'Print exclusive tax breakout on check' to enable this option.

Exclusive base text — Contains up to six characters of text, such as 'Base,' to print before the taxable sales amount in the tax breakout section below Balance Due on the guest check. **Required Options:** You must select 'Print exclusive tax breakout on check' to enable this option.

Group bar: Guest Check Style

Number of leading blank lines — Specifies the number of blank lines to appear at the top of the guest check. This allows for an attractive guest check and paper cutting.

Number of trailing blank lines — Specifies the number of blank lines to appear at the bottom of the guest check. This allows for an attractive guest check and paper cutting.

Taxable item indicator — Designates the character to print next to any taxable item on the guest check or receipt. This is a one-character field, and is useful in a retail environment when wanting to differentiate between taxable and nontaxable items.

Use large font — Uses a larger font size on the guest check.

Use large font for total — Prints the Balance Due and Change Due lines on the check in a larger font size.

Use large font for order name — Prints the name of the guest check in a larger font size.

Auto-print when items are ordered — Enables a receipt to print automatically as soon as food is committed to an order mode or sent to the kitchen. This is very helpful in fast environments where you need to print a receipt for the guest without waiting for authorization from the processor. The credit card status prints on the receipt as 'Authorizing.'

Wait for authorization to complete before printing if the authorization amount is greater than — Allows you to type the amount over which you want the system to complete an authorization before printing a receipt for the guest. For example, if you type \$50.00, the system completes the authorization before printing a receipt only for those transactions that are greater than \$50.00 Documented Version: v15.1.

Auto-print when non cash tender is applied — Enables a receipt to print automatically as soon as you slide or tap a non-cash tender as payment for an order. This is very helpful in fast environments where you need to print a receipt for the guest without waiting for authorization from the processor to complete. **Related Options: 1)** The credit card status prints on the receipt as 'Authorizing' unless the amount is greater than the threshold you establish in 'Wait for authorization to complete before printing if the authorization amount is greater than.' **2)** Because the system will not allow you to process a payment when unordered items exist on a check, you must select an order mode before you slide or tap a card unless you also define a default order mode in Maintenance > Hardware > Terminals or Maintenance > System Settings > Order Entry Queue. If the non-cash tender allows tips or requires security verification, you must enter this information before continuing with the authorization. **Documented Version:** v12.3.

Wait for authorization to complete before printing if the authorization... — Establishes the amount over which you want an authorization for a non-cash tender to complete before printing a receipt for the guest. For example, if you type \$50.00, the system completes the authorization before printing a receipt only for those transactions that are greater than \$50.00. **Documented Version:** v15.1



Reference

Refer to the [Credit Card Lookup in Quick Service Feature Focus Guide - HKS336](#) for more information about how you can apply 'Auto-print when non cash tender is applied' and 'Wait for authorization to complete before printing if the authorization amount is' to your operation.

Print refund slip — Prints a refund slip when you apply a refund from the FOH. **Related Options:** To enable an employee to perform a refund, select Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Cash refunds' and 'Non-cash refunds' under the 'Financial' group bar.

Number of refund slip copies — Specifies the number of refund slips to print when you apply a refund from the FOH. You can print up to 10 copies of the refund slip. **Related Options:** You must select 'Print refund slip' to enable this option.

Refund slip message — Specifies the number of the guest check message that contains the text to print on the refund slip when you apply a refund. **Required Options:** Access Maintenance > Messaging > Guest Check Messages to define the message for a refund slip.

Group bar: Check Stub

Use the options under the 'Check Stub' group bar to support environments where a guest orders as they walk into the restaurant. The person taking the order enters the items into the system, without ordering them, and a check stub prints for the guest to take with them to the table. The guest will then hand the check stub to the server. The server verifies the order, accesses the guest check in the system, and begins the process of ordering the items. The server maintains the guest check during the meal, and provides the guest with a check when they are ready to leave. The guest pays the server or the cashier, upon exiting.

You can define the information to print on the check stub, as well as control whether to print a check stub at initial order entry or to print a new check stub every time the server modifies the guest check.

The following is a sample check stub:

(Guest Check Message)	
(Address)	
(Telephone)	
(Stub Text Line 1)	
(Stub Text Line 2)	
(Stub Text Line 3)	
(Employee Name)	(Date)
(Check Number)	(Time)
(Order Items)	
(Bar Code)	

Print check stub — Activates the Print Check Stub feature and enables the remaining options under the 'Check Stub' group bar.

Print guest check information — Prints guest check information you define elsewhere on the check stub. **Required Options: 1)** You define the information that prints at the top of the guest check on the Message tab in Maintenance > Messaging > Guest Check Message. **2)** You define the information that prints in the second area in Maintenance > Business > Store > Location Information tab under the 'Settings' group bar.

Print upon exiting order — Prints the check stub each time you exit the check. The check stub does not print until you exit the check, regardless of whether you order an item.

Print only once — Prints the check stub the first time you open and close the check only. It does not print when you make modifications to the check.

Do not print barcode — Does not print the bar code on the check stub. Only thermal printers support printing the bar code.

Stub text 1 — Specifies the text to print on the check stub. Type a maximum of 50 characters.

Stub text 2 — Specifies the text to print on the check stub. Type a maximum of 50 characters.

Stub text 3 — Specifies the text to print on the check stub. Type a maximum of 50 characters.

Group bar: Hard Check

Number of leading blank lines — Specifies the number of lines down from the top to print checks on a slip printer. A hard check, or slip, is a guest check that you must manually feed into the slip printer.

Lines per sheet not including leading lines — Specifies the total number of printable lines on the check, not including any blank lines, when printing checks on a slip printer.

Clock in/Clock out left margin on hard check — Specifies how far to the left the clock-in/clock-out punch begins printing on the hard check.

Clock in/Clock out right margin on hard check — Specifies how far to the right the clock-in/clock-out punch stops printing on the hard check.

Group bar: Hard Check > Slip Printer Options

Print short clock-out report — Causes a clock-out report to print on the slip printer without period-to-date detail.

Clock-in/clock-out left margin — Specifies how far to the left the clock-in/clock-out report begins printing on the hard check.

Clock-in/clock-out right margin — Specifies how far to the right the clock-in/clock-out report stops printing on the hard check.

Group bar: Tray checks

Suppress tray check for single seat — Prevents printing the tray check when there is only one seat assigned to the check. For example, one guest orders items. The system checks and verifies a 'single' tray, and does not print the tray check. If you do not select this option, when a single guest orders items, the system prints the tray check. **Documented Version:** v14.1.

Chit Printing Group

Use the options in the Chit Printing group to define:

- The content to print on the chit, such as a summary section of items, consolidation of items, and if previously ordered items print with new items.
- The line space to leave at the top and the bottom of the chit for proper aligning and centering.
- The sorting of items and modifiers.
- Other requirements you need to print on the chit, such as consolidation, the order time in bold, the check number, a quantity number next to items, and how modifiers display on the chit.
- Table tents, such as how you increment the table tent number, and user-defined messages to display as prompts.
- Production chits, such as tray chit printing and expediter chit printing.
- Chit printing requirements when you perform a void.

Chit types

Regular chits print items ordered per station. When pivot seating is enabled, item and seating information are included.

Tray chits are used in a pivot seating environment by the person assembling the order and distributing it to the table by seat position. This feature provides the kitchen with a summary of the order contents, and the seat number to which each item belongs. All items from an order print on the tray chit, including the items routed to a specific printer station. The chit prints the summary by seating arrangement.

Expediter chits are like a tray chit, except they print a summary grouped by like items, instead of by seating arrangement.

Group bar: Kitchen chit > Content

Print check number — Prints the check number on the chit.

Print SKU Number — Prints the SKU number of the item on the chit. **Required Options:** Access Maintenance > Menu > Items > SKU Numbers tab to define up to five SKU numbers per item. If you order the item with a scanner, the system prints the appropriate SKU number. If you order the item without a scanner, the system prints the first available SKU number, found vertically in the list of SKU numbers. The system prints the SKU number before each item and its modifiers, if applicable and found, as shown in the 'Chablis' line item. The SKU number does wraps to the next line, if necessary.

If the SKU number and item cannot fit on the same line, the system prints the SKU number on the first line and the item name on the next line, as shown in the 'Special 50th Anniversary Goblet' line item. If the item does not have a SKU number, it prints as shown in the '2 Glasses' line item.

FRANCIS	04/29/2005
Table 15	11:37 AM
Type: Dine In	1 of 1
1 123456743213 Chablis	
	2 Glasses
	12356789101 Anniversary Glass
1 789101234567	
Special 50th Anniversary Goblet	

Disable standalone chit printing — Prevents chit information from printing to a local printer. Standalone chit printing is for when the local terminal is the master and only terminal in use, therefore, all chits route to the local printer.

Print message if order contains items routed to more than one order printer — Prints message on the chit, if the system routes an order to multiple printers. The message is summarized at the bottom of the chit as follows:

More Items @
<printer name>

Print all items on all kitchen chits — Prints all items in an order that were not committed to an order mode. This is for a normal printing environment.

Print entire order including previously ordered items — Prints all items in an order, regardless if previous items were committed to an order mode. For example, if you add a dessert to a check that contained a previously ordered entrée, both the dessert and the entrée print on the chit. Typically, you use this in Quick Service environments where you distribute the entire order at once.

Do not reprint chit when order mode is changed — Does not reprint a chit for ordered items when the order mode changes, such as from 'To-Go' to 'Dine-In.' Typically, you use this in Quick Service environments.

Number of leading blank lines — Sets the number of blank lines to print at the beginning of the chit to allow for a readable chit, paper cutting, and the placement of chits on a ticket wheel, or bar. Type a maximum of two digits.

Number of trailing blank lines — Sets the number of blank lines to print at the end of the chit to allow for a readable chit and paper cutting. Type a maximum of two digits.

Use full paper cuts — Cuts printed chits completely instead of partially.

Maximum lines per chit — Sets the maximum number of lines you can print on the chit. If the order exceeds the maximum lines, the system breaks the chit into multiple chits and prints x of y at the bottom of each chit. **Required Options:** You must select a chit type of 'Summary' to enable this option.

Maximum items per chit — Sets the maximum number of items you can print on the chit. If the number exceeds the maximum items, the system breaks the chit into multiple chits and prints x of y at the bottom of each chit. **Required Options:** You must select a chit type of 'Summary' to enable this option.

Maximum seats per chit — Gets the maximum number of seats you can print on the chit. If the number exceeds the maximum seats, the system breaks the chit into multiple chits and prints x of y at the bottom of each chit. **Required Options:** You must select a chit type of 'Summary' to enable this option.

Sort items by priority — Causes menu items to print on the chit using their assigned 'Priority.' The Course Ordering feature also respects the value entered for 'Priority' when you use the course entry screen to assign courses. **Related Options:** To assign a priority to an item, access Maintenance > Menu > Item Routing > Item Routing tab and enter a value between 1 and 255 in 'Priority' under the 'Routing Assignment' group bar.

Print a separator line between priority — Prints a separator line between menu items with different priorities. **Required Options:** This works in conjunction with 'Sort items by priority.'

Modifier sorting method — Sorts the modifier on the chit per the method you select.

As entered — Displays modifiers in the order you enter them for the item.

By priority, modifier group, name — (1) Sorts alphabetically based on the priority defined for the modifier in Maintenance > Menu > Items > Item tab under the 'Auto menu' group bar. (2) If modifiers have the same priority, they sort alphabetically based on the order of the modifier groups attached to the menu item.

By modifier group, priority, name — (1) Sorts alphabetically based on the order of the modifier groups attached to the menu item. (2) Sorts alphabetically based on the priority defined in Maintenance > Menu > Items > Item tab under the 'Auto menu' group bar.

By priority only — (1) Sorts alphabetically based on the priority defined for the modifier in Maintenance > Menu > Items > Item tab under the 'Auto menu' group bar.

Use highest modifier priority if greater than item priority — If a modifier has a higher priority than the item it modifies, the entire item takes on the higher priority.

Expediter printer — Designates the printer to which a chit containing all menu items for orders will print. An order split between two or more printer groups in the kitchen also prints in its entirety on the expediter printer. Orders not split between printer groups have no effect on the expediter. When you modify a printer, the change applies to all areas assigned to that printer. **Required Options:** This option only affects the printers defined in Maintenance > Hardware > Printers > Options tab with 'In kitchen' selected under the 'Option settings' group bar.

Expedite even when items only route to one printer — Prints an expediter chit when the system routes all ordered items to one kitchen printer. If cleared, expediter chits print when the system splits an order between two or more kitchen printers.

Group bar: Appearance

Use large font — Prints the chit in a larger font than the default size.

Print double height text — Doubles the default height of the text.

Print order mode in red — Prints the selected order mode(s) in red ink on the chit.

Print chit time in bold — Prints the time header information in bold type.

Print native items in bold — Prints items in bold, at the designated printer for the items, when used as modifiers. For example, a salad used as a modifier for a steak, prints in bold at the salad prep printer, and normally at the grill printer. When ordered as a menu item, the salad prints normally at both the salad prep printer and at the grill printer.

Print open item indicators — Prints the preceding and succeeding exclamation point indicators when you enter the item using a QWERTY keyboard. **Related Options:** To define open items to print in red, select 'Print open items in red.'

Print open items in red — Prints the entry in red when you type the item using a QWERTY keyboard. **Related Options:** To define open item indicators on the chit, select 'Print open item indicators.'

Print modifiers in red — Prints all modifiers in red ink when printed on color printers, or in reverse type on monochrome printers.

Print items in red if flagged as 'Highlight if modifier' — Prints modifier items defined to highlight in red ink, when printed on color printers. On some printers, the item may display in reverse type. **Related Options:** To define items to display highlighted, access Maintenance > Menu > Items > Modifier tab and select 'Highlight if modifier' under the 'If used as a modifier' group bar.

Print No, Extra, Side, etc. modifier items in bold — Prints items with No, Side, Extra, and Sub in bold type.

Print No, Extra, Side, etc. modifier items in red — Prints items with No, Side, Extra, and Sub in red type.

Group quick combo items — Prints items that are part of a quick combo promotion together on the chit.

Consolidate items with identical modifiers — Consolidates like items with the same modifiers on the chit. **Related Options:** To apply consolidation to a table using pivot seating, select "Consolidate 'For Table' items only."

2 TBone	
	Rare
	Salad
	Beans

Consolidate items with different modifiers — Consolidates like items on the chit even if the modifiers are not the same.

2 TBone	
	1 Rare

		Salad
		Beans
	1 Medium Rare	
		Salad
		Beans

Print '1' in front of single quantity — Prints a '1' in front of any item that is ordered without another like item, instead of '>'.
 >

1 TBone	
	1 Rare
	1 Salad
	1 Beans

Print parenthesis for quantity items — Prints the total number of like items in parenthesis in front of the item.

(6) BBQ Sandwich

Default item justification — Enables items to print with left, right, or centered justification.

No, Extra, Side, etc. modifier items justification — Enables No, Side, Extra, and Sub to print with left, right, or centered justification.

Wraparound modifiers — Determines how modifiers appear on the chit.

One line per modifier — Prints one line per modifier under the item being modified. *(Default)*

Contiguous, on same line as item — Prints modifiers as one single line along with the item being modified.

2 TBone	Rare	Salad	Beans
---------	------	-------	-------

Contiguous, on next line following item — Prints modifiers as one single line under the item being modified.

2 TBone			
	Rare	Salad	Beans

Wraparound modifier tab stops — Specifies the number of characters used to separate each modifier. **Required Options:** You must select a wraparound type of 'Contiguous, on same line as item' or 'Contiguous, on next line following item.'

Group bar: Tray Chits

Print tray chits — Enables tray chit printing on the printer you select in 'Tray chit printer,' and enables all other options under the 'Tray Chits' group bar.

Tray chit printer — Specifies the printer to use for tray chit printing.

Do not print items from this category — Enables the tray chit printer to exclude the category of items specified in 'Excluded category.' This feature, when used with sub-orders, ensures that a category of items, such as Beverages does not print on kitchen chits.

Excluded category — Specifies the category of items to exclude from printing on chits.

Do not print modifier items — Prevents printing the modifiers on the tray chit.

Maximum seats per tray chit — Sets the maximum number of seats per tray for each chit. If the order exceeds the maximum lines, the system breaks the chit into multiple chits and prints x of y at the bottom of each chit. Valid options range from 0 to 99.

Group bar: Order Taker Chits

Print order taker chits — Prints order taker chits and enables you to define a message to print on the chit. **Related Options:** To define an employee as an order taker, access Maintenance > Labor > Jobcodes > Order Entry tab, select 'Order taker' under the 'Order entry' group bar, and assign the job code to the employee.

Text line 1 through Text line 5 — Specifies one to five lines of message text to print on the order taker chit.

Group bar: Table Tents

Table tents are physical markers placed on the table, by either the guest or the employee, to reduce the time a guest spends in line, and to help identify the table for order delivery. This is common in a counter environment that does not employ the use of table numbers, and when orders require preparation time. When enabled, the Aloha system requires you to enter a table tent number when you send an order to the kitchen that contains an item routed to a printer group. For example, if you only order a non-alcoholic beverage, which is commonly not routed to a printer, the table tent prompt does not appear.

SCENARIO: The guest orders a pizza from the front counter. The employee takes a physical table tent with a number, hands it to the guest, and enters the same number when sending the order. The guest places the table tent at his table. The employee delivers the order to the correct table by comparing the number on the chit or guest check with the number on the table tent.

You can assign only one table tent number per check. The number you type appears on the chit, guest check, and in the Change Due message box. It does not appear on the video screen, if you are using a remote display systems add-on. In operations where you wish to name certain orders with the 'Name Order' function, instead of using the table tent prompt, select 'Do not use table tent for named orders' under this group bar.

There are two FOH options for entering table tent numbers. The system automatically increments the table tent number by one for each order. You can override the system generated number and type the number for each order, which starts a new numbering sequence. You can also use the 'Force Sequence' option to allow the system to keep the same numbering sequence and offer you the next table number, which you can accept or skip. Both options accommodate situations when a physical table tent is lost, damaged, or not placed in order.

Use table tent numbers — Activates the Table Tent feature and enables the remaining options under the 'Table Tents' group box.

Minimum tent number — Designates the beginning number in the series. Type a number up to 9998 and lower than the 'Maximum tent number.' Leave this text box blank if you want to always manually enter the table tent number in the FOH.

Maximum tent number — Designates the ending number in the series. Type a number up to 9999 and higher than the 'Minimum tent number.' Leave this text box blank to always *manually* enter the table tent number in the FOH.

On-screen prompt — Designates the text for the prompt in the FOH Change Due message box, such as 'Tent #.'

Guest check text — Designates the message line to appear on the guest check, such as 'Order #.'

Chit text — Designates the message line to appear on the chit, such as 'Order #.'

Do not use table tent for named orders — Does not prompt for a table tent number when you perform a Name Order function before you send the item to the kitchen. **Related Requirement:** To add the Name Order button function, access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels, and then add the Name Order button function to the appropriate currently used panel.

Scenario 1: Type an item for the order, name the order with the Name Order function, then send the order to the kitchen. The table tent prompt does not appear.

Scenario 2: Type an item for the order, send the item to the kitchen with an available order mode, then name the order with the Name Order function. The table tent prompt appears.

Force sequential number entry — Retains the original numbering sequence as defined in the minimum and maximum tent numbers. You cannot manually enter a table tent number, but you can skip the offered table tent number and accept the next available number in sequence.

Report Printing Group

Use the Report Printing group to define the requirements for certain reports, such as the Employee Checkout, Drawer Checkout, Flash, and Interval reports.

Group bar: Transaction Chits

Number of copies of petty cash chits — Denotes the number of chit copies to print for each petty cash in/out transaction. Type a number greater than zero.

Print void chits at remote printer — Prints voided chits to a remote printer only.

Print void chit when an item is voided — Prints a void chit when you void an item.

Create check dump files in training mode — Allows customized files, while in training mode, to manipulate the check information based on requirements of the establishment.

Group bar: Checkout Reports

Print only custom employee checkout — Prints only the custom checkout when an employee performs a checkout. **Related Options:** Selecting this option disables all options under the 'Checkout Reports > Employee Checkout' group bar.



Reference

Refer to the [Custom Checkout Feature Focus Guide - HKS313](#) for more information on configuring a custom checkout.

Print only custom drawer checkout — Replaces the standard drawer checkout report with a comprehensive report that you customize using Checkout.cfg. **Related Options:** Selecting this option disables all options under the 'Checkout Reports > Drawer Checkout' group bar.

Group bar: Checkout Reports > General Checkout

Print zero-amount lines — Prints all lines on the checkout report, even though some amount values may be zero. If cleared, lines with zero values do not print.

Print additional cash calculation section — Prints an alternate cash calculation on the checkout. The normal cash calculation adds all sales and subtracts all non-cash payments to arrive at the cash amount. An extra section prints showing cash sales less charge tips to arrive at a cash owed figure.

Change due detail for non-cash tenders — Prints, by tender, the total amount of change received from a non cash tender (gift certificates, travelers checks, etc.). If a guest check has multiple non cash tenders, the change due is allocated to the first non cash tender found on the check.

Print non-cash tenders detail — Prints a separate listing for non-cash tenders.

Print check count — Prints the number of checks closed during a shift.

Print number of split checks — Prints the number of splits on the check when you split a check between customers.

Group bar: Checkout Reports > Employee Checkout

You must clear 'Print only custom employee checkout' to enable the options under this group bar.

Exclude voids from the gross sales on the employee checkouts — Does not include voids in the gross sales total that prints on the employee checkout.

Print detailed list of all checks — Prints a separate listing for tendered checks. This option is helpful for troubleshooting a specific problem.

Sort by revenue center — Sorts guest checks by the revenue center in which they originated. Revenue center information lists with the check detail information. **Required Options:** You must select 'Print detailed list of all checks' to enable this option.

Include tax in performance measures — Includes taxes in the totals printed for the Performance Measures report.

Print number of cleared items — Prints the number of items you removed (cleared) from a guest check before sending them to the kitchen on the Drawer Checkout report. **Related Options: 1)** When you select 'Totals only' or 'List all' as the 'Drawer checkout values' option, the Drawer Checkout report prints the number and total sales value of cleared item information. **2)** When you select 'List all with values' for the 'Drawer checkout values' option, the Drawer Checkout report prints the number and total sales value of cleared item information only if there was activity. If there was no activity, cleared item information does not print.

Group bar: Checkout Reports > Drawer Checkout

You must clear 'Print only custom drawer checkout' to enable the options under this group bar.

Drawer checkout values — Separates the cashier activity into distinct transaction types. You specify whether you want the report to list only summary totals, or more detailed information for these transaction types.

Totals only — Lists summarized totals for each transaction type. For example, if you select this option, the Sales transaction type appears as a combined total for all sales, rather than a separate total for each sales category (e.g., food, beverage, and so on).

List all — Lists detailed totals for each transaction type, broken out by transaction IDs. For example, if you select this option, the Sales transaction type appears as a separate total for each sales transaction ID, or category (e.g., food, beverage, and so on). This option lists all transaction IDs for each transaction type. If no activity occurred for a given transaction ID, the report still shows a line item for the transaction ID, with a zero next to the transaction ID.

List all with values — Lists detailed totals for each transaction type, broken out by transaction IDs. For example, if you select this option, the Sales transaction type appears as a separate total for each sales transaction ID, or category (e.g., food, beverage, and so on). If no activity occurred for a given transaction ID, the report does not show a line item for the transaction ID.

Print Sales Section — Prints the Sales section at the bottom of the Drawer Checkout report. The Sales section contains sales transactions for checks closed to this cash drawer, and provides you with information you can use for comparison balancing.

Print detailed list of all checks — Prints a separate listing for tendered checks. This helps with troubleshooting a specific problem.

Sort by revenue center — Sorts guest checks by the revenue center in which they originated. Revenue center information appears with the check detail information. **Required Options:** You must select 'Print detailed list of all checks' to enable this option.

Print voided items — Includes the number and total sales value of items you voided from a guest check after they are ordered on the Drawer Checkout report. **Related Options: 1)** When you select 'Totals only' for the 'Drawer checkout values' option, the report prints the number and total sales value of voided item information only. **2)** When you select 'List all' for the 'Drawer checkout values' option, the report prints the number and total sales value of voided information and for each defined void reason, regardless whether activity occurred. **3)** When you select 'List all with values' for the 'Drawer checkout values' option, the report prints the number and total sales value of voided information only for each defined void reason that showed activity.

Print cleared items — Includes the total sales value of the items you removed (cleared) from a guest check before sending them to the kitchen on the Drawer Checkout report. A second line prints with the percentage of cleared items against net sales, based on the following calculation: total of cleared item sales / net sales x 100. **Related Options: 1)** When you select 'Totals only' or 'List all' for the 'Drawer checkout values' option, the report prints the number and total sales value of cleared item

information. **2)** When you select 'List all with values' for the 'Drawer checkout values' option, the report prints the number and total sales value of cleared item information only if there was activity. If there was no activity, cleared item information does not print.

Show drawer checkouts payments — Specifies the method used to report at which drawer a payment appears. This is useful in a multiple drawer environment. Select from one of the following options.

Check Closed — Reports payments at the drawer from which you closed the check.

Payment Adjusted — Reports payments at the drawer from which you last adjusted a payment.

Group bar: Report settings

POS Flash report time interval in minutes — Determines the number of minutes, per interval, to use for displaying the FOH flash report. Valid options include 5, 10, 15, 20, 30, and 60 minute intervals.

Enable print option for POS Flash report — Enables you to print the Flash report from the FOH terminal and displays the Print button on the FOH Entire Day Summary page. If this option is cleared, you can only view the FOH Flash report.

Do not print wages on POS labor report — Does not print wages on the FOH Labor report.

Display custom reports on the FOH — Allows you to view custom FOH reports on screen first and print the report only when desired instead of automatically sending them to the printer. This replaces the need to enable Print Intercept functionality to control when to print a custom FOH report.

Break alert threshold hour(s) — Defines the threshold in which employees can work continuously without a break before appearing above the Threshold line on the FOH Break Alert report. Enter a time between 0 and 24 hours (in decimal format). For example, type 4.25 to enter at total of 4 hours and 15 minutes. 0 hours indicates no threshold and all clocked in employees appear on the FOH Break report. **POS Version:** Obsolete as of v6.4.

User Interface Group

The User Interface group enables you to define settings pertaining to the appearance of the FOH, screen timeout requirements, and other elements that affect the user interaction with the system. Use the options in the User Interface group to define:

- The alert that indicates the system is in redundancy mode.
- The QuickSearch Employee Lookup feature.
- Whether to use the Enhanced Graphical Interface feature, or FOH theme, instead of the basic Aloha interface.
- Support information to appear on the FOH Floating Logo screen.
- The number of rows and columns to use for showing modifiers on the FOH Modifier screen.
- The size and positioning of the FOH Change Due message.
- Requirements for pole displays, such as the text to print when not in use, and if the subtotal appears.
- Volume levels help to determine when to cut labor staff based on periodical sales totals.

Group bar: Display

Logo screen contact information — Displays the selected Aloha support or contact information on the FOH floating logo screen.

Display NTEP CC Information on Logo screen — Shows the company name and software version of the scale in use on the FOH floating logo screen.

For sites in the United States, it is a requirement of the National Conference of Weights and Measures (NCWM) that POS systems interfacing with scales be compliant with the standards set forth by the National Type Evaluation Program (NTEP). The NTEP program was established in 1984 by a committee of weights and measures officials, as well as manufacturers and users of weighing devices. The purpose of this program is to govern a set of requirements for evaluating commercial weighing and measuring devices before they are sold. Failure to abide by these regulations could result in penalties and the removal of the scale from the workplace. Compliance is not mandatory for International locations

NTEP Certificate — Specifies the actual certification number to indicate the Aloha POS system is compliant with NTEP standards. **Required Options:** You must select 'Display NTEP CC Information on Logo Screen' to enable this option.

Graphical Skin — Designates the skin to apply to the FOH interface. **Related Requirements:** Access Maintenance > System Settings > Skins to create a new skin or change a predefined skin. **Documented Version:** v12.3.

Disable enhanced graphics on POS — Disables the enhanced graphical interface on the FOH terminal screens.

Disable graphics in maintenance — Disables the enhanced graphic interface on the BOH screens representing the FOH, such as menus, submenus, modifiers, exception modifiers, panels, and the floor plan.

Base font — Indicates the type face used on the FOH terminals.

Character set — Specifies the style of characters to display on the FOH terminals.

Use this open item if the order taker enters a SKU# that cannot be found — Designates the default item to use when the system cannot read the SKU number. **Related Options:** To associate a SKU number with an item, access Maintenance > Menu > Items > SKU Numbers tab and add the SKU number.

Item unavailable message text — Specifies the text, up to 80 characters, that appears for unavailable items. **Documented Version:** v12.3.

Item unavailable media file — Specifies the graphic to appear for unavailable items. Be aware the system does not resize the custom graphic to fit the size of the button, the way it can with system-generated buttons. You must size the graphic to match the dimensions of the button on which it appears. **Related Requirements:** You must first add the graphic to the database using the Media Files function, and perform an import into CFC to access the graphic. **Documented Version:** v12.3.

Available item category — Specifies the category to use with the Item Availability feature that allows you to filter and search for items to set as unavailable, using an alphanumeric keypad. In Aloha Table Service, you must select the Search/Filter button on the Item Availability screen to access the search functionality. If you do not specify a category, then the button does not appear. **Documented Version:** v12.3.



Reference

Refer to the [Item Availability Feature Focus Guide - HKS368](#) for more information on the Item Availability feature.

Prefix for items in suspend mode — Indicates an ordered item is in suspend mode until ready to be sent to the kitchen. Type a maximum of three characters.

Show cursor — Places a large 'X' on the FOH touch screen instead of a small dot, when used with a mouse. The small dot still appears on the FOH Enter Employee number screen.

Enable recipes — Activates the recipes feature for the selected store. A recipe lists both the ingredients and directions for making or preparing an item. For the Aloha POS system, recipes can be used for a wide range of purposes, from enabling employees to answer ingredient questions for the guest, to providing the bartender instructions on how to prepare a drink.

Default recipe bitmap — Assigns a default image to a recipe, in addition to the text to appear if you define no recipe bitmap for a menu item in Maintenance > Menu > Items > General Settings tab in 'Recipe bitmap' under the 'Recipe information' group bar. Store the bitmap files in the Recipe folder. The file naming convention is ITM(item number).bmp, where (item number) is the number of the item in the Item file, with no leading zeros. Click the down arrow to select an image from the list of graphics preloaded into the system database. **Related Requirements:** You must upload an image using the Media Files function, before it is available for selection in the image list.

Enable multimedia — Allows multimedia files, such as .avi files, to run on the Front-of-House.

Do not display No, Side, and Extra modifier buttons — Prevents the No, Side, and Extra modifier buttons from appearing on the FOH terminal screens. **Related Options:** This option does not appear in v6.4.

Use quick-search employee lookup — Enables a FOH Lookup screen for every instance requiring you to select an employee. Using this feature, you can search for employees alphabetically or by numeric ID.

Do not display total lines on unordered checks — Suppresses the check total line on all unordered guest checks, when printed.

Accept keyboard input — Enables the system to accept input from an attached keyboard.

QWERTY keyboard layout — Displays the Qwerty keyboard to all POS employees to type names and descriptions. Valid options include 'Never,' 'Always,' and 'By Employee Table.' **Related Options:** 'By Employee Table' refers to the selection for 'Prefers qwerty keyboard' under the 'Personal information' group bar in Maintenance > Labor > Employees > Employee tab. 'Prefers qwerty keyboard' does not appear for the employee type 'Above store only.'

Recall the oldest open order — Automatically selects the order that has been open the longest, when the employee touches the Recall Next Open button on the FOH terminal.

Show entry fields in inverse — Shows options in white text against a shaded background.

Display a 'Run Program' button on close check screen — Shows a user-defined script button that accesses another program on the server. Type a maximum of 255 characters.

Text to display on the 'Run Program' button — Indicates the button label to assign to the 'Run Program' button. This button appears on the FOH terminals.

Disable modifier touch screen keyboard — Prevents the typewriter button from appearing in the lower left corner of the refill modifier screen.

Display count on modifier buttons — Enables the system to show the modifier count on each button for which you apply an item modifier count.

Display dialog boxes associated with electronic payments in full-screen — Enables full-screen error messages when an error occurs while applying electronic payments, such as a credit or gift card. The employee cannot view any screen behind the error message until they dismiss the error message, eliminating potential confusion. **Documented Version:** v15.1.

Display double zero button on tender screen — Enables a double zero button to appear on the keypad that appears on the Tender screen, allowing you to add two zeros to the tender amount using a single button touch. **Documented Version:** v19.3.

Display employee assigned to cash drawer on login screen — Enables a Cash Drawers Info button to appear on the FOH login screen, making it easier for employees to view cash drawer assignments without requiring a manager to log in and navigate to the Manage Drawers function. All configured cash drawers appear; an error message appears if the manager has not yet performed cash drawer assignments. **Documented Version:** v19.4.

Change due dialog box font size — Allows you to change the font size of the change due box so that employees can easily read the message that appears. (1) You must check the resolution of your screen, then (2) select the appropriate size from the 'Change due dialog box font size' drop-down list. The available options are 'System default (12), which is considered 'medium,' 'Large (64),' and 'Extra Large (88).' **Documented Version:** v19.5.

Group bar: Display > Quick Combo

Sort Quick Combo panels by — Specifies the sorting method to use for the system-generated quick combo item selection and substitution panels. You can sort items on these panels by the ID number, short name of the item, or upsell level.

Quick Combo template — Specifies the panel to use for the system-generated quick combo selection and substitution panels. If you do not define a template panel, the system uses the first button on the upper-left corner of the panel on which the button resides, to define the display properties of the buttons on the quick combo item selection panel. The quick combo substitution panel does not adhere to the properties of the first button on the upper-left corner of the panel. **Required Options:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels, and create a panel to use for a template panel.

Scan Quick Combo from last to first — Scans items on the guest check in reverse order, from the bottom of the check to the top, to determine if the items required for a quick combo exist on the check and the quick combo can be auto-applied. For example, if you add a hamburger, drink, small fries, and onion rings to the guest check, in that order, and you allow onion rings as a substitute for fries, if you scan the check from top to bottom, the system builds the quick combo using the small fries. If you scan the check from bottom to top, the system builds the quick combo using the onion rings.

Display combo instantly — Specifies that quick combo items appear as you enter them for the order, rather than waiting until you enter all components for the quick combo. Use this option so the guest and the employee can validate the items are correct on the FOH guest check window, order confirmation display, pole display, and video screen. **Related Options:** To use this option for video screens, access Maintenance > Hardware > Video Queues > Video Queue tab and select 'Display items as entered' from the 'Display method' drop-down list under the 'Settings' group bar.

Group delete removes all items — Removes an entire unordered quick combo from the FOH guest check window when you delete the quick combo via the quick combo header or one of the quick combo components. **Required Options:** To use this feature for a quick combo, access Maintenance > Payments > Promotions > Quick combo QS tab and select 'Group delete' under the 'Quick combo QS' group bar.

Mixed level Quick Combo to reflect as regular level — Enables the system to detect if a quick combo has the same component across all upsell levels and to consider the quick combo as a regular level. **Documented Version:** v12.3.

Group bar: Display > Graphics on External Orders

Image — Designates the image to appear in the order entry queue as a visual indicator the order was received from an Application Program Interface (API), such as mobile orders. **Related Options:** The image you select under the 'Display > Graphics On External Orders' group bar is first in the hierarchy and supersedes any image you configure in the Order Mode function. **Documented Version:** v19.3.

On-screen check background — Designates the image to appear as the background of an on-screen guest check as a visual indicator the order was received from an Application Program Interface (API), such as mobile orders. **Related Options:** The 'On-screen check background' image you select under the 'Display > Graphics On External Orders' group bar is first in the hierarchy and supersedes any image you configure in the Order Mode function. **Documented Version:** v19.3.

Group bar: Display > POS Order Entry Check

Display items in priority order — Prioritizes items on the FOH on-screen guest check by the order you enter the items. If cleared, the items appear in the order of their priority. **Related Options:** To configure priorities on items, access Maintenance > Menu > Items > Item tab and type a priority number in 'Priority' under the 'Auto menu' group bar.

Consolidate identical items — Combines like items as one item line with a quantity number, on the FOH on-screen guest check. If cleared, items appear listed separately. You can toggle consolidation with the Page/Half Page icon at the top of the FOH on-screen guest check.

Uses context panels — Activates the use of context panels, allowing you to automatically display a panel, from which you can make additional selections when you select an item, modifier, quick combo, or a quick combo component from another panel or from the guest check window. **Related Requirements:** You must access Panel Editor, create a Quick Service panel, and select 'Context Panel' on the Edit Panel - Button Functions dialog box to configure a panel as a context panel.

Display modifiers in priority order — Prioritizes modifiers on the FOH on-screen guest check by the order you enter the modifiers. If cleared, the modifiers appear in the order of their priority. **Related Options:** To configure priorities on items, access Maintenance > Menu > Items > Item tab and type a priority number in 'Priority' under the 'Auto menu' group bar.

Consolidate quantity ordered modifiers — Combines like modifiers that you enter using the quantity function. For example, you touch the quantity button, type a number, and select a modifier. The modifier appears consolidated with the quantity you typed in front of the modifier. If you type that same modifier again without touching the quantity button first, the second entry appears on its own line. **Documented Version:** v12.3.

Always sort modifiers in order entered — Sorts modifiers using the order in which you type them in the FOH.

Use included modifiers — Activates the 'Included Modifiers' feature that allows you to place a bit-map on the modifier button on the FOH screen for modifiers that come with an item.

Display message for deferred modifier — Suppresses the system generated 'pop-up' modifier panel from which you can select a modifier to fulfill a deferred modifier and displays a message prompting you to manually locate the modifier on your own. **Required Options:** To configure a modifier group as deferred, access Maintenance > Menu > Modifier Groups > Modifier tab and select 'Deferred modifier' under the 'Settings' group bar. The 'Deferred modifier' is only available for the Standard modifier type. **Documented Version:** v12.3.

Modifier Bitmap — Associates a bitmap that appears on the FOH screen for all modifiers configured as included with a menu item. **Required Options:** You must select 'Use included modifiers' on this same tab to enable this option.

Print in kitchen — Determines whether Aloha Kitchen is responsible for all kitchen chit printing. If cleared, Aloha POS is responsible for all kitchen chit printing and allows included modifiers to print on the kitchen chit. **Required Options:** You must select 'Use included modifiers' to enable this option.

Auto-combine scanned checks — Enables the system to combine checks scanned with a bar code reader. This eliminates the need to select the Combine button when scanning multiple checks for the same order.

Use Alphanumeric keyboard for get check — Displays an alphanumeric keypad on the Get Check screen, allowing you to retrieve a check named using either a tab name or the name order function, or if you use alphanumeric table numbers. If using a scanner and the scan fails, you must type the name of the guest check exactly as it appears on the guest check.

Auto-scroll to bottom upon order — Shows the real-time, cumulative subtotal information on the on-screen guest check as you add items to the order. This allows you to know the check total always, without having to manually scroll down to the bottom of the check. **Documented Version:** v12.3.

Display image on active and review checks — Enables images taken by a third party camera interface to appear on the active guest check window and the review order window on the order entry screen. When you recall a check from the screen containing all images in the queue, the check appears in the review order window. **Related Options:** Selecting this option enables the 'Display check from Check Images in on-screen check,' 'IP address,' and the 'IP port' options. To recall a check to the active guest check window rather than the review order window, select 'Display check from Check Images in on-screen check.' **Related Options:** Selecting this option enables 'Display check from Check Images in on-screen check,' 'IP address,' and 'IP port.' **Documented Version:** v14.2.

Display check from Check Images in on-screen check — Allows you to easily recall a check from the screen containing all images in the queue to the active guest check window rather than the review order window. You must select this option if you do not use the review order functionality. **Required Options:** You must select 'Display image on active and review checks' to enable this option. **Documented Version:** v17.1.

IP address — Specifies the IP address to connect to the server attached to the camera or other device provided by the third-party company. **Required Options:** You must select 'Display image on active and review checks' to enable this option. **Documented Version:** v14.2.

IP port — Specifies the IP port on the server to which the third-party camera or other device connects. **Required Options:** You must select 'Display image on active and review checks' to enable this option. **Documented Version:** v14.2.



Reference

Refer to the [Multi-Lane Drive-Thru Vehicle Identification Feature Focus Guide - HKS1670](#) for more information.

Group bar: Functionality

Override refund order mode — Allows you to designate a default order mode to use when applying a refund, with the added ability to select a different order mode when you refund the check in the FOH. If cleared, the system closes all refunded transactions to an internal order mode ID 99 and you cannot apply a different order mode to the refunded check.

Default order mode — Designates the default order mode to use in the FOH when applying a refund to a guest check. If the default order mode is not the same order mode from which the check originated, you can select a different order mode at the time you perform the refund.

Category for item lookup — Specifies the non-sales category of items available when you touch the Item Lookup button on the FOH order entry screen. To include all items in the Item Lookup function, select 'None.'

Automatically detect card swipe — Automatically detects the card type when you slide a payment card across a magnetic stripe reader or tap it against a proximity reader. The applicable guest check must be active in the guest check window. Clearing this option disables automatic detection so, to apply payment, you must select the tender button on the FOH screen that is specific to the card type.

Required Options: **1)** Selecting this option enables 'Prompt for ordered items' and 'Prompt for unordered items,' from which you must select the desired behavior, if different than the default behavior. **2)** You must define up to four valid prefix numbers in Maintenance > Payments > Tenders > Identification tab under the 'Prefix checking' group bar, for each gift card or private label card for which to use auto-detection. **Related Options:** **1)** We recommend you access Maintenance > Payments > Tenders > Type tab and select 'Display tender screen on card swipe' under the 'Options settings' group bar, to give you the opportunity to approve or change the payment amount prior to authorization. **2)** We recommend you define an 'Order mode' for each terminal you configure in Maintenance > Hardware > Terminals, or access Maintenance > System Settings > Order Entry Queue > Order Entry Queue tab and specify a 'Default order mode' under the 'Settings' group bar; otherwise, you must select an order mode before initiating the payment process. **Documented Version:** v12.3.

Prompt for ordered items — Specifies how the system behaves for items on the guest check in the 'ordered' state after you slide or tap a card when using auto-detection. **Required Options:** You must select 'Automatically detect card swipe' to enable this option.

Process Payment — Causes the system to send an authorization request to the processor for any items on the guest check remaining in the 'ordered' state after you slide or tap a card. This option is best suited for an environment in which the cashier controls the payment card.

Hold for Payment — Causes the system to capture and hold the payment card data in memory on the terminal, indicated by a green box around the check in the order entry queue, allowing you to retrieve the data later for payment using the 'Get Stored CC' button function. This option is best suited for an environment in which the guest controls the payment card. **Related Requirements:** You must access Screen Designer and add the 'Get Stored CC' button to a panel to retrieve the stored payment card data held in memory.

Prompt for unordered items — Specifies how the system behaves for items on the guest check remaining in an 'unordered' state after you slide or tap a card when using auto-detection. **Required Options:** You must select 'Automatically detect card swipe' to enable this option.

Order and Process Payment — Bypasses the Yes/No message prompt and immediately orders the 'unordered state' items on the guest check using the default order mode, after you slide or tap a payment card for which use auto-detection. This option is best suited for an environment in which the cashier controls the payment card.

Prompt to Order and Process Payment — Enables the Yes/No message prompt to appear in the FOH when items on the guest check remain in an 'unordered' state, after you slide or tap a payment card for which you use auto-detection. The prompt provides you the opportunity to evaluate and return to the guest check to make changes, if needed. Responding 'Yes' to the prompt immediately orders the unordered items using the default order mode, and sends an authorization request to the processor as soon as you approve the payment amount. Responding 'No' to the prompt cancels the authorization request and returns to the guest check, providing the opportunity to make changes. You must slide the card again to submit another authorization request. This option is best suited for an environment in which the cashier controls the payment card.

Hold for Payment — Causes the system captures and holds the payment card data in memory on the terminal, indicated by a green box around the check in the order entry queue, allowing you to retrieve the data later for payment using the 'Get Stored CC' button function. This option is best suited for an environment in which the guest controls the payment card. **Related Requirements:** You must access Screen Designer and add the 'Get Stored CC' button to a panel to retrieve the stored payment card data held in memory.

Automatically detect and hold all tapped cards — Automatically detects the card type only when you tap a card against a proximity reader. To enable auto-detection of both tapped cards and cards with a mag stripe, select 'Automatically detect card swipe' instead of this option. Clearing both of these options, disables auto-detection for tapped cards only, and you must select a tender button specifically configured to the card type to apply payment for tapped cards on the FOH screen. The system automatically assumes the 'Hold for Payment' functionality for both ordered and unordered items. The applicable guest check must be active in the guest check window. The system captures and holds the card data in memory on the terminal, indicated by a green box around the check in the order entry queue, allowing you to retrieve the data later for payment using the 'Get Stored CC' button function. **Required Options:** You must access Maintenance > Payments > Tenders > Identification tab and define up to four valid prefix numbers under the 'Prefix checking' group bar, for each gift card or private label card for which to use auto-detection. **Related Requirements:** You must access Screen Designer and add the 'Get Stored CC' button to a panel to retrieve the stored payment card data held in memory. **Related Options: 1)** We recommend you access Maintenance > Payments > Tenders > Type tab and select 'Display tender screen on card swipe' under the 'Options settings' group bar for each card type you define, to give you the opportunity to approve or change the payment amount prior to authorization. **2)** We recommend you define an order mode for each terminal

you configure in Maintenance > Hardware > Terminals, or access Maintenance > System Settings > Order Entry Queue > Order Entry tab and specify a 'Default order mode' under the 'Settings' group bar; otherwise, you must select an order mode before initiating the payment process. **Documented Version:** v12.3.

Google wallet support — specifies whether you support payment-only or full Google Wallet integration. If you support full Google Wallet integration, you must choose how the system responds to Yes/No message prompts that occur when the request from Google Wallet to apply a coupon, loyalty, or payment fails. **Documented Version:** v12.3.

None — Does not allow you to apply coupons and loyalty information using the Google Wallet application. Select this option if you support payment-only for Google Wallet.

Prompt to continue on error — Enables a Yes/No message prompt to appear when the request from Google Wallet fails to apply a coupon or loyalty card to the check. You could potentially receive an error for each failure point. Select this option, if you support full Google Wallet integration and you want to require a response to any Yes/No message prompts that appear as a result of one of these errors.

No prompt to continue on error — Enables the system to continue without displaying a Yes/No prompt when the request from Google Wallet fails to apply a coupon or loyalty card, to the check. Select this option if you support full Google Wallet integration and if you want the system to assume a Yes response at each failure point. For example, if Google Wallet sends a request to apply a coupon and a payment to a check, and the system cannot apply a coupon and a payment to a check without displaying the Yes/No prompt for the failed coupon.

Softcard wallet support — Specifies whether you support payment-only or full mobile pay integration. If you support full mobile pay integration, you must choose how the system responds to Yes/No message prompts that occur when the request from a mobile pay device to apply a coupon, loyalty

card, or payment fails. Softcard has been acquired by Google and is no longer supported. **Related Options:** Selecting an option other than 'None' enables 'Softcard location ID' and Softcard merchant ID.'

None — Does not allow you to apply coupons and loyalty information using soft cards. Select this option if you support payment-only for soft cards.

Prompt to continue on error — Enables a Yes/No message prompt to appear when a request from a mobile pay device to apply a coupon or loyalty card to the check fails. You could potentially receive an error for each failure point. Select this option, if you support full Google Wallet integration and you want to require a response to any Yes/No message prompts that appear as a result of one of these errors.

No prompt to continue on error — Enables the system to continue without displaying a Yes/No prompt when the request from a mobile pay device to apply a coupon or loyalty card, to the check fails. Select this option if you support full soft card integration and if you want the system to assume a Yes response at each failure point. For example, the system receives a request to apply a coupon and a payment to a check, but cannot apply a coupon and a payment to a check without displaying the Yes/No prompt for the failed coupon.

Softcard location ID — Specifies the location ID provided by the mobile pay device. You must enter an even number of hexadecimal digits (0-9, A-F). Softcard has been acquired by Google and is no longer supported. **Required Options:** You must select an option other than 'None' in 'Softcard wallet support' to enable this option.

Softcard merchant ID — Specifies the merchant ID provided by the mobile pay device. You must enter an even number of hexadecimal digits (0-9, A-F). Softcard has been acquired by Google and is no longer supported. **Required Options:** You must select an option other than 'None' in 'Softcard wallet support' to enable this option.

Restrict to single item selection — Requires you to select single items from the on-screen guest check window. When you select a different item, the system clears the previously selected item. This prevents employees from deleting multiple items in one transaction, and provides a more accurate audit of the number of deletions the employee performs. **Required Options:** You must clear this option to enable 'Allow multiple item selection.'

Allow multiple item selection — Allows you to select multiple items from the on-screen guest check window. **Required Options:** You must clear 'Restrict to single item selection' to enable this option.

Apply repeat or quantity of component to entire Quick Combo — Prevents you from using the Repeat or Quantity button on a quick combo component; instead, the function repeats the entire quick combo. **Documented Version:** v12.3.

Automatically navigate to modifier screens — Automatically shows the appropriate modifier group associated with the menu item, when you select a modifier for the menu item on the FOH screen. The system always navigates to the 'Classic' modifier screen even when you are using system-generated modifier panels. **Related Options:** Selecting this option enables 'Automatically replace a selected modifier.'

Automatically replace selected modifier — Causes the automatic removal and replacement of the selected modifier, when you select a new modifier from the modifier screen that appears when using auto-navigate. **Required Options:** You must select 'Automatically navigate to modifier screens' to enable this option.

Allow modifier additions or replacements on ordered items — Allows you to add a modifier or replace one modifier with another, after ordering the item, but prior to tendering. You must first select the modifier from the on-screen guest check. **Related Options:** This option enables both 'Void Reason to be used for modifier replacement' and 'Approval required for modifier replacement.' **Documented Version:** v12.3.

Void Reason to be used for modifier replacement — Designates the void reason to use when you replace an ordered modifier with another, prior to tendering. Select one void reason to apply to all modifier replacements. If you do not select a void reason, then 'Unknown' appears as the reason on reports. **Required Options:** You must select 'Allow modifier additions or replacements on ordered items' to enable this option. **Related Options:** To define a void reason, access Maintenance > System Settings > Void Reasons. **Documented Version:** v12.3.

Approval required for modifier replacement — Determines whether you require manager approval when you replace an ordered modifier with a lesser-priced modifier. **Required Options:** You must select 'Allow modifier additions or replacements on ordered items' to enable this option. **Documented Version:** v12.3.

Never — Does not require manager approval when you replace an ordered modifier with another modifier, regardless of a price increase or decrease.

When replacement modifier is priced lower — Requires manager approval only when the replacement modifier costs less than the original modifier. If the employee has a sufficient access level, the manager approval screen does not appear and the system internally reports the void performed by the employee. **Related Options:** To allow an employee access to void their own items, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Void items' under the 'Financial' group bar.

Use best price for Group Combo auto-apply — Enables the system to calculate the best price option when a guest orders separate items that may be less expensive if ordered as a combo.

Ignore Group Combos when restricting promotion application — Allows the system to apply a group combo promotion for which restrictions exist around allowing more than one promotion on a check. This allows you to apply a coupon to a check that also contains a group combo, when the configuration for the coupon does not allow more than one promotion on the check. **Related Options:** You add or remove restrictions to or from a promotion using options on the Restrictions tab in Maintenance > Payments > Promotions. Clear an option on this tab to enforce the restriction; select an option on this tab to remove the restriction. **Documented Version:** v12.3.

Ignore Quick Combos when restricting promotion application — Allows the system to apply a quick combo promotion for which restrictions exist around allowing more than one promotion on a check. This allows you to apply a coupon to a check that also contains a quick combo, when the configuration for the coupon does not allow more than one promotion on the check. **Related Options:** You add or remove restrictions to or from a promotion using options on the Restrictions tab in Maintenance > Payments > Promotions. Clear an option on this tab to enforce the restriction; select an option on this tab to remove the restriction. **Documented Version:** v12.3.

Enable grouped modifier changes — Allows you to use the Quantity button to easily add the same modifier to more than one like item on a guest check, if the like items appear consolidated in the guest check window. If the modifier you select is a priced modifier, the guest check updates to reflect the additional charge for the priced modifier multiplied by the number of like items selected for modification. For example, a guest orders 12 sliders, but wants pickles added to only four of them. Pickles, when added as a priced modifier, is \$0.25 so the system adds \$1.00 to the guest check. **Related Options:** You must use the consolidated feature in the guest check window. **Documented Version:** v19.3.

Multiple item ordering scanning format — Specifies the type of scanning format used for a QR code generated by a non-integrated scale that is not attached to the Aloha POS system. This allows you to scan a single QR code associated with one or more items. Currently, the ProCom system is the only supported scanning format. **Related Options:** To allow you to scan a single QR code associated with one or more items, access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels, and add the 'Multiple Item Scanning' button function to a panel in use. **Documented Version:** v19.9.

Group bar: Hardware > Touchscreen Beeping

Button beep frequency in Hertz — Sets the frequency of audible signals generated by the Aloha POS system. **Related Requirements:** The FOH terminal must have a sound card installed to use this feature.

Button beep duration in 1/20th seconds — Sets the duration of audible signals generated by the Aloha POS system. **Related Requirements:** The FOH terminal must have a sound card installed to use this feature.



Tip

You can disable the audible beep by typing the number 1 in both 'Button beep frequency in Hertz' and 'Button beep duration in 1/20th seconds.'

Background beep frequency in Hertz — Sets the frequency of audible signals generated by the Aloha POS system. **Related Requirements:** The FOH terminal must have a sound card installed to use this feature.

Background beep duration in 1/20th seconds — Sets the duration of audible signals generated by the Aloha POS system. **Related Requirements:** The FOH terminal must have a sound card installed to use this feature.

Group bar: Hardware > Scale

Guest check Net weight message — Defines the text to print on the guest check when the system uses the automatic scale reading. This optional message should be short, such as 'NET WT.'

Scale timeout seconds — Specifies the number of seconds the system waits for a scale reading before it times out. The POS system must receive three consecutive identical scale readings for one instance, before accepting a reading. When the system exceeds the number, you have the option to retry a reading or make a manual entry. Type a value from three to 999 seconds. The default number of seconds is five.

Scale manual weight message — Defines the text to print on the guest check when you enter a manual weight. Type a maximum of 15 characters. The default text is 'MAN WT.'

Group bar: Hardware > Pole Display

Display message on pole display when not in use — Enables text to appear on the pole display when the pole display is not in use. If employees self-assign their drawers, the message appears after the 'You are now assigned to the bank' message. **Related Options:** Selecting this option enables 'Message,' into which you define the text to appear on the pole display when the display is not in use.

Message — Designates the text to appear on the pole display, such as "Closed" or "Next Register," when the pole display is not in use. Type a maximum of 80 characters. **Required Options:** You must select 'Display message on pole display when not in use' to enable this option.

Show subtotal — Displays the running subtotal on the pole display —

.Timeout in seconds — Specifies the number of seconds of inactivity before the pole display message disappears from the pole display. Valid entries range from 1 to 65535.

Group bar: Hardware > Fingerprint Scanner

Support UPEK Fingerprint devices — Allows UPEK and UPEK2 approved scanners to communicate with the Aloha POS system. **Documented Version:** v15.1.

Group bar: Volume levels

Use volume levels to monitor gross sales at set intervals. When sales reach a certain level, the volume level changes so managers can determine their flow of business and when to cut staff. The system checks the gross sales value once every defined interval and indicates the current volume level on the status bar on the FOH screen. **Required Options:** You must access Maintenance > System Settings > Volume Level and define the range of gross sales (high and low) for each level.

Interval to update volume level in minutes — Specifies the interval by which the system checks the value for gross sales and changes the volume level, if necessary.

Default volume level — Designates which volume level is to appear on the FOH screen as the starting level.

Security Group

Use the Security group to define important security restrictions for the entire restaurant and all employees. Options in the Security group include:

- Additional features, such as Drawer and Payment Reconciliation, and Aloha Spy.
- Requirements for passwords, such as the minimum and maximum number of digits, and if passwords are disabled, optional, or required.
- Whether BOH users can change item prices.
- Cash drawer security requirements, such as pre-opening the cash drawer without a transaction, and hiding the cash drawer amount from the employee.

Group bar: POS Security

Enable running sales totals (Non-reset totals) — Carries sales totals over to the next day of business without resetting them to zero. These figures appear on the BOH Sales Summary and Weekly Summary reports.

Enable Aloha spy — *Activates the Aloha Spy feature, which interfaces with the TVS security video. The camera in use displays order entry information, along with the image, in the BOH.*
Related Options: Selecting this option enables 'Output check number.'

Display Restaurant Guard icon on terminal — Displays the Aloha Restaurant Guard logo on the FOH floating logo screen, indicating the employee theft prevention system (Aloha Restaurant Guard) is active. **Documented Version:** v12.3.

Output check number — Sends the guest check number to the video security monitor, recording the number as part of the video image while continuing to record the check ID number in the Trans.log. The check number is the number that prints on the check and appears in reports, making it easier to associate on-screen activity with a specific check number. If you clear 'Output check number,' the system sends the check ID to the video security monitor instead. The check ID is a number generated by the system using a complicated algorithm. Although this number contains more detailed information about the check, it is more difficult to associate this number with a specific guest check. **Required Options:** You must select 'Enable Aloha spy' to enable this option.

Run employee payment reconciliation from — Determines the physical location from which you will perform employee or drawer reconciliation.



Reference

Refer to the [Drawer Reconciliation Feature Focus Guide - HKS310](#) or [Employee Reconciliation Feature Focus Guide - HKS307](#) for more information on configuring and using the reconciliation features.

Front of House — Activates and enables you to run reconciliation functions from FOH terminals only.

Front of House and Back of House — Activates and enables you to run reconciliation functions from either the FOH terminal or the BOH computer by accessing Functions > Payment Reconciliation. This accommodates environments that can spare the use of a terminal while reconciling a drawer.

Ignore tender configuration in cash reconciliation and starting bank — Allows the system to use only the values defined in Maintenance > Payments > Coins and Bills. If cleared, the system uses the values defined in Maintenance > Payments > Coins and Bills, as well as in Maintenance > Payments > Tenders, and therefore, does not support multi-currencies. **Documented Version:** v12.3.

Drawer resets automatically upon checkout — Specifies the drawer totals to reset after an employee performs a drawer checkout. This option bypasses the 'Would you like to reset the drawer totals?' screen.

Print only drawer checkout slip header — Prints the checkout header during reset of the drawer in a drawer checkout.

Manager Mode expires (in minutes) — Defines the maximum number of minutes allowed for the system to remain in Manager Mode without activity. **Required Options:** You must access Maintenance > Screen Designer > Quick Service Screen Designer and create a Manager Mode Toggle button to provide access to Manager Mode on a terminal where another employee is already logged in to the FOH. **Documented Version:** v15.1.

Group bar: POS Password

Minimum password length — Specifies the minimum number of digits allowed for manually entered log in IDs and access approvals. This option does not apply to mag card use.

Maximum password length — Specifies the maximum number of digits allowed for manually entered log in IDs and access approvals. This option does not apply to mag card use. This option must be equal to or greater than the 'Minimum password length.'

Password method — Determines whether you disable, require, or optionally enter passwords in the FOH. Passwords are an extension to the employee log in ID. For example, if the employee log in number is 100, and the password is 100, then the employee must enter 100100 to log in to the system.

Disabled — Disables the use of FOH passwords, including mag cards. The Change Password button does not appear on the FOH Employee screen.

Optional — Enables any employee to log in to the system either with, or without, a password extension.

Required — Requires all employees to use passwords.

Group bar: Restrictions

Restrict open items by access level — Uses POS access levels to determine who can enter open items.

Minimum open item amount — Sets the lowest price that you can enter for an open item amount.

Maximum open item amount — Sets the highest price that you can enter for an open item amount.

Maximum check amount — Sets the maximum amount, including taxes and surcharges, you can add to the guest check. Type a dollar amount of \$0.01 to \$999,999.99. Type 0 if you do not want to set a restriction. An error message appears when you exceed this amount and you cannot add more items to the current check. You must close the check, and start a new one.

Maximum number of items on a check — Indicates the maximum number of items you can add to the check. The system takes the number of lines on a check into account, such as blank lines, balance due lines, tax lines, subtotal and total lines, to determine when you reach the maximum. An error message appears when you try to exceed this number and you cannot add more items to the current check. You must close the check, and start a new one.

Limit the time that items can be cleared before ordering — Enforces a time limit in which an employee can remove an unordered item from a check without manager approval. **Related Options:** Selecting this option enables 'Number of seconds' and 'Void items when cleared past the time limit.'

Documented Version: v12.3.

Number of seconds — Specifies the amount of time (in seconds), from 0 to 999, that an employee must remove an unordered item from the check without requiring manager approval. If you remove an unordered item from a check after the number of seconds specified here, you must specify a void reason in 'Void items when cleared past the time limit,' to establish a default void reason; otherwise, the system prompts for a void reason. **Related Options:** You must select 'Limit the time that items can be cleared before ordering' to enable this option. **Documented Version:** v12.3.

Void items when cleared past the time limit — Specifies the default void reason for items you remove after the allotted time limit. Select 'None' to prompt for a void reason. Be aware this option may have implications on inventory, store-level reporting, and above-store reporting. You might want to select a reason with 'Return voided items to inventory' selected, to avoid potential inventory tracking issues. **Required Options:** You must select 'Limit the time that items can be cleared before ordering' to enable this option. **Documented Version:** v12.3.

Limit the time that items can be voided after ordering — Enforces a time limit (in minutes) after which an employee cannot void an ordered item from a check without manager approval. **Related Options:** Selecting this option enables 'Number of minutes.'

Number of minutes — Specifies the amount of time (in minutes), from 0 to 999, after which an employee cannot void ordered items without requiring manager approval. **Required Options:** You must select 'Limit the time that items can be voided after ordering' to enable this option.

Limit the time on check activity after a split check — Designates to start a timer as soon as an employee initiates the split check function. If the check remains open when the time limit expires, a manager must approve any activity on the parent or any split of the check, to reset the timer and allow the employee to continue working with the check. **Required Options:** Selecting this option enables 'Number of seconds.' **Documented Version:** v14.1.

Number of seconds — Designates the number of seconds after an employee initiates the split check function at which a manager must approve the activity on any split of a check. **Related Options:** Selecting this option enables 'Number of minutes.' **Required Options:** You must select 'Limit the time on check activity after a split check' to enable this option. **Documented Version:** v14.1.

Limit the number of split check functions after the first check print — Designates to limit the number of times an employee can initiate the split check function for a check after printing any check in the split. If an employee tries to initiate the split check function after reaching the limit, a manager must enter a password to allow the employee to continue working with the check. **Related Options:** Selecting this option enables 'Number of split check functions.' **Documented Version:** v14.1.

Number of split check functions — Designates the maximum number of times an employee can initiate the split check function for a check after printing any check in the split. **Required Options:** You must select 'Limit the number of split check functions after the first check print' to enable this option. **Documented Version:** v14.1.

Allow checks with comps, promotions and/or tax exempt items to be split — Enables employees to split a guest check to which a promotion, comp, or tax exemption has already been applied.

Required Options: To allow an employee to split checks, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Split checks' under the 'Financial' group bar, and then assign the access level to the employee.

Cannot move payment types — Prevents employees from moving applied payments from one split check to another. **Required Options:** To allow an employee to split checks, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Split checks' under the 'Financial' group bar, and then assign the access level to the employee.

Day range to perform tip and sales distribution — Establishes whether you allow the distribution of tips and sales for checks from prior days, checks from the current day, or checks from both, when using Tip and Sales Distribution.

Previous days — Works with checks from previous days only and not checks for the current day.

Current — Works with checks for the current day only and not checks from previous days.

Current and previous days — Works with checks from previous days and for the current day.



Reference

Refer to the [Sales and Tip Distribution Feature Focus Guide - HKS379](#) for more information on configuring and using the Tip and Sales Distribution feature.

Disable petty cash accounts — Disables the use of petty cash accounts in the Aloha POS system.

Restrict checkout from queues with open checks — Does not allow the last employee with cash accountability for an order entry queue to check out, if there are any open checks in the order entry queue, regardless of who opened the check. **Documented Version:** v12.3.

Restrict user from voiding own items (overrides 'Void items' access level) — Prevents an employee assigned to an access level with 'Void Items' selected from voiding items on their own transactions. A manager approval screen appears allowing another authorized employee to perform the void. For example, the Nevada Gaming Board does not allow an employee to void their own items. **Documented Version:** v14.1.

Limit to one quick refund per closed check — Prevents employees from refunding a closed check multiple times using the Quick Refund function. **Related Requirements:** You configure the Quick Refund button in Maintenance > Screen Designer > Quick Service Screen Designer. **Documented Version:** v19.3.

Group bar: Cash Drawer

Pre-open cash drawer — Pre-opens the cash drawer on each cash in/out transaction.

Do not display the amount of cash in the drawer — Conceals the cash drawer amount. If selected, the calculated amount in the cash drawer does not appear on the drawer screen.

Disable cash drawer timeout — specifies the cash drawer can remain open without on screen or audible warnings until you close it. The system allows you to enter orders and perform other POS functions even when the drawer is open. Clear this option, if you want to define a timeout threshold, an audible beep, or both, to assist with system security. **Related Options:** You must select 'Do not allow order entry when cash drawer is open' to prevent the entering of new orders while the cash drawer is open. **Documented Version:** v12.3.

Drawer timeout seconds — Specifies the number of seconds the cash drawer can remain open before the audible alarm sounds. The alarm begins immediately if you set this value to zero (0). **Required Options:** You must clear 'Disable cash drawer timeout' to enable this option. **Related Options:** You must select 'Do not allow order entry when cash drawer is open' to prevent an employee entering new orders while the cash drawer is open. **Documented Version:** v12.3.

Beep on timeout — Produces an audible beep when the cash drawer is open longer than the value in 'Drawer timeout seconds.' The alarm sounds immediately, if you set the value in 'Drawer timeout seconds' to zero (0). **Related Options:** You must clear 'Disable cash drawer timeout' to enable this option. **Documented Version:** v12.3.

Do not allow order entry when cash drawer is open — Forces the employee to close the cash drawer before they can enter an order or other transaction involving the cash drawer.

Open drawer when check balance is zero — Automatically opens the cash drawer when the check reaches a zero balance. A zero balance occurs when you add items to a check, then use a void, comp and/or a promotion to back it down to zero. A zero balance also occurs when employees try to close a check with a zero priced item, such as water. **Related Options:** This option overrides 'Open drawer on close' located in Maintenance > Payments > Tenders > Tender tab under the 'Settings' group bar.

Do not allow cancellation of cash declaration — Prevents employees from canceling their cash declaration. When selected, the Cancel button does not appear on the FOH Enter Declared Cash screen. **Required Options:** To require employees to declare their cash, you must access Maintenance > Labor > Job Codes > Financial tab and select 'Must declare tips at clock out' under the 'Tips' group bar, and then assign the job code to the employee. **Related Requirements:** You must access Panel Editor and add the Checkout button function to an available panel, with 'Automatically Open Cash Drawer' selected, to benefit from this feature.

System Group

Use options in the System group to define information about the store, and the capabilities of the system, for the whole restaurant. Use the options in the System group to define:

- Required time and date settings, such as the date of business (DOB), opening time, first day of payroll week, and the local time zone.
- Security key licensing codes used by the Aloha system.
- Store information to use on printed materials and reports, such as the unit number, telephone number, and the store's address.
- Requirements for interfacing with third-party programs and applications, such as Aloha, Aloha Loyalty and COM.
- Maximum item amounts to hold in the database, on a guest check, and item price changes.
- Debugging information generated by the store for troubleshooting, such as events, mag stripe readers, and pole displays.
- End-of-Day requirements, such as the Winhook batch file, a 24-hour environment, and whether the system copies .cdx and .tdx files to subdirectories.

Group bar: Day/Time

Open time — Specifies the restaurant opening time for reporting and system requirements. The opening time is not the time the restaurant opens, but the time employees begin work.

First day of the week — Specifies the first day of the payroll period for reporting purposes.

24-hour operation — Indicates the restaurant is open 24 hours per day and causes the EOD process to operate differently in regards to handling open checks and clocked-in employees. When the EOD process occurs, the system closes all open checks and clocks out all clocked-in employees to finalize the date of business. The system also retains any unordered items left on the check when the EOD process or a system refresh occurs; however, it does not retain items that are in progress but are not completely entered. Before the EOD process completes, the system clocks employees back in and reopens the closed checks with a new check number which then attributes sales to the new DOB.

Related Options: **1)** This option enables 'Report carryover sales to first daypart of new day.' **2)** If you select '24-hour operation' and then access Maintenance > Business > Store > Store Settings tab > Labor group and select 'Auto-Clock Out at End of Day' under the 'Employee settings' group bar, the system clocks out employees at the time the EOD runs, but does not clock them back in for the new business day. If you select '24-hour operation' and clear 'Auto-Clock Out at End of Day, the system clocks out employees at the time the EOD process runs and then clocks them back in for the new business day.

Reporting Behavior with 24-Hour Operations

Employee checkouts show sales for the entire shift, even if it encompasses two days of business.

Reporting Behavior with 24-Hour Operations

Although the system attributes the sales from checks still open at the time of the EOD process to the new DOB instead of the previous DOB, the BOH check reprint function still lists these checks for both dates.

If you are verifying report calculations using reprinted checks, some checks may not apply to the DOB in question.

FOH sales reports for the new DOB include sales from checks that were still open at EOD.

The time stamp displayed on a check listed in the FOH View Open Checks function is true to the time the check was originally opened.

The open time does not reset following EOD.

The Employee Break Report reports the end time as the time the EOD process was run.

Report carryover sales to first daypart of new day — Allows a 24-hour site to post sales from an open check, to the following day part, or day, when the EOD process runs. For example, you have open sales at 11:55, and invoke the EOD process at 12:00 while the check is still open, which then defers those sales to the first day part of the new day. This allows the previous day to not show over-inflated sales amounts. **Required Options:** You must select '24-hour operation' to enable this option.

Synchronize POS time with back office time — Makes the time on your POS terminal correspond to the time set on your back-office terminal. This causes SyncTime.exe to run every two hours for all terminals on the system, which synchronizes the terminal time with the time on the file server. It does not interfere with normal operations.

Time zone — Determines whether the time zone of the restaurant is subject to internationally recognized seasonal adjustment, such as Daylight Saving Time (DST). Most of the United States begins Daylight Saving Time at 2:00 a.m. on the second Sunday in March and reverts to standard time on the first Sunday in November. In the European Union, Summer Time begins and ends at 1:00 a.m. Universal Time (Greenwich Mean Time). It begins the last Sunday in March and ends the last Sunday in October. Daylight Saving Time for the U.S. and its territories is NOT observed in Hawaii, American Samoa, Guam, Puerto Rico, the Virgin Islands, the Eastern Time Zone portion of the State of Indiana, and most of Arizona (except for the Navajo Indian Reservation, which participates because of its large size and location across three states, including Arizona). Selecting 'International daylight savings

time' creates a TimeZone.ini, which stores the time zone settings on the file server. The latest versions of data in the \Data directory, and the new TimeZone.ini with the new settings, copies from the file server to the FOH when the FOH terminals synchronize upon boot up.

US daylight savings time — Sets the system to use United States DST settings. This is the default value, which uses the United States rules for DST to spring forward in March, and fall back in November.

No daylight savings time — Specifies your area does not observe DST. This prevents Aloha programs from springing forward or falling back. You must set all terminals and the file server to a state or area that does not observe DST for this variable to work properly.

International daylight savings time — Specifies you are outside the United States. The DST rules of the local country are followed.

Group bar: Interfaces

Enable customer survey — Enables a restaurant to print a customer call-in survey on the guest check. A custom banner and message print on each guest check. The banner prints directly below the check header information and above the menu items. The message prints after the menu items and before the first subtotal line. Use surveys to provide managers the ability to request customer call-in survey responses using a guest check. It is available for an additional cost and requires a new security key code. **Required Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display survey' under the 'Options to display' group bar to expose this option. **Related Options:** Access Maintenance > Messaging > Survey > Banner tab and define the banner and message to print on the guest check.



Reference

Refer to the [Customer Survey Feature Focus Guide - HKS304](#) for more information on configuring and using surveys.

Split checks inherit parent's survey frequency — Enables the survey to print on each split of a guest check with a survey assigned. For example, if you set the survey frequency to 2, and the check being split happens to be a check on which the survey will print, the survey prints on every split of the check. **Required Options:** You must select 'Enable customer survey' to enable this option. **Documented Version:** v14.1.

Indicate when employee worked less than this many days — Indicates the number of days at which you consider an employee to be experienced and trained, based on the date of business of the restaurant against the hire date of the employee. Entering the default value of 0 days indicates all employees are considered experienced. **Related Options:** Works in conjunction with the tenth digit of 'Code output' located in Maintenance > Messaging > Survey under the 'Settings' group bar. If the

employee has been with the company less than the defined number of days, the tenth digit is 0 or 1, indicating the employee is new. If the employee has been with the company more than the defined number of days, the digit is 2 or 3, indicating the employee is considered experienced.

Enable Kitchen — Automatically populates the Aloha Kitchen intercept. No entry required.

Enable QSR video KDS interface — Allows you to interface, through COM, to the QSR video KDS software.

External integrated software component 1 through component 5 — Specifies the application or .dll file, located in the \Bin directory, with which the system interfaces through COM, such as PrinterIntercept.dll.

Request file path for Aloha BackOffice CIM applications — Indicates the specific file path to run CIM applications.

HTML online POS help page — Indicates the available online help page. Valid options are None, Radiant Systems, and Custom. **Related Options:** Selecting Custom enables 'Online POS help page URL.'

Online POS help page URL — Provides a custom URL for online help. **Required Options:** You must select Custom in 'HTML online POS help page' to enable this option.

IP address for PMS Comp Posting server — Designates the PMS server with which the Aloha POS system interfaces to confirm and post a comp.

TCP Port for PMS Comp Posting server — Specifies the port with which to connect a PMS server to the Aloha POS system.

Group bar: Platform Export

Export to Platform - Catalog — Enables CFC to export store catalog records to the BSL catalog service for online use.

Revenue Center available for online — Restricts item data exports to items from a specific revenue center. Select 'None' (Default) to export all item data to the Catalog, or select a single specific revenue center from the drop-down list. In this context, None = no restrictions to a specific revenue center. **Required Options:** You must select 'Export to Platform - Catalog' to expose this option.

Export to Platform - Promo: — **This option is not available as of this publication date.** Exports to a BSL platform-based micro service called Digital Coupon Service. **Required Options:** You must select 'Export to Platform - Catalog' to expose this option.

Group bar: Redundancy

Terminal automatically becomes fileserver in redundancy — Designates the selected terminal will take over as the file server in situations where the file server goes down unexpectedly. This process of redundancy helps to keep a restaurant functioning even when the BOH file server goes down.

Show redundant mode indicator — Displays a red outline on the FOH Log in screen to indicate the system is operating in redundant mode. All terminals show the name of the terminal that is acting as the master terminal at the bottom center of the screen. The label MASTER appears to indicate which is the master terminal, along with the name of the acting file server.

Group bar: End Of Day

Regenerate POS data daily at this time — Forces a data export at the same time each day, based on the time set for this option. If you do not want to force an export, leave this option blank. This option has a time range of 00:00 - 47:59.

Name of batch file to run following EOD — Contains the name of a custom batch file to launch following the EOD process. Custom batch files allow you to automate certain routines originating outside the Aloha POS system that address Aloha data files, such as compressing or zipping data files, and copying them to another drive. Type a maximum of 25 characters.

Number of minutes to save video log transactions prior to EOD — Specifies the number of minutes of transactions sent to the video screen to carry over for the next business day. **Required Options:** You must select '24-hour operation' to utilize this feature.

FOHHOOK.BAT timeout in seconds — Instructs the master terminal how long to wait (in seconds) after executing FOHHook.bat so the batch has time to complete before the terminals reboot. Since the Master terminal leaves the EOD flag in the Data folder for the number of seconds defined in this option, none of the other terminals will reboot. You should set this option to 50 or higher, but you may need to adjust the seconds per your batch file requirements. Set this option to zero (0) to disable FOHHook.bat. **Related Requirements:** To enable FOHHook.bat to function, create a file labeled FOHHook.bat in the Aloha application software Bin folder, configure the batch file to perform the desired tasks and then configure the number of seconds for this option. **Note:** If you do not allow enough time in 'FOHHOOK.BAT timeout in seconds,' the FOH terminals may restart before the batch file tasks finish. Valid entries range from 0 to 999.

Do not copy index files to dated subdirectory — Prevents the system from copying .cdx files to dated subdirectories at EOD. Two files, AdjTime.cdx and GndBreak.cdx, *always* copy, regardless of the selection for this option.

Prevent business date from exceeding system date — Specifies the date of business (DOB) must never move past the system date. The DOB should always match the current system date, to report sales properly and prevent errors from occurring between the BOH and FOH. Most sites configure the Aloha POS system to run the EOD process at a certain time using an event, to ensure the

DOB increases to the next business day; however, some sites, such as 24-hour operations, invoke the EOD manually either from the BOH or the FOH. This option prevents the possibility of a site invoking the EOD process multiple times for the same business day, eliminating the possibility of multiple dated subdirectories containing sales from only one day of business.

Time for manual EOD reminder message — Designates the time, using a 48-hour clock, in which you want a FOH message to appear over the floating logo screen reminding you to perform a manual End-of-Day. The message appears each time the floating logo appears until you run the EOD. For example, to define the reminder to appear at 1:00 a.m., type 25:00. To disable the reminder, type 00:00. **Related Options:** If you select 'Prevent business date from exceeding system date,' and the date of business is equal to, or greater than the system date, you cannot run a manual EOD. The message continues to appear until the system date is greater than the date of business, at which time you can run the EOD.

Category excluded from Item Availability reset — Represents the non-sales category created for item availability carryover items. You must assign all items for which you track item availability to this category. If you do not select a category, the system resets all item quantities to zero at EOD.



Reference

Refer to the [Item Availability Feature Focus Guide - HKS368](#) for more information on configuring and using the Item Availability feature.

Enable EOD control server process delay — Enables the system to delay control server process by the number of seconds specified in 'Seconds to wait for CTLSVR to rename Update.str to Update.hld. Minimum is 30.'

Seconds to wait for CTLSVR to rename Update.str to Update.hld. Minimum is 30 — Delays the control server process by the number of seconds specified. Valid entries range from 30 to 999. **Required Options:** You must select 'Enable EOD control server process delay' to enable this option.

Enable EOD control server FOH process delay — Enables the system to delay control server FOH process by the number of seconds specified in 'Seconds to wait for CTLSVR to delete Update.hld. Minimum is 120.'

Seconds to wait for CTLSVR to delete Update.hld. Minimum is 120 — Delays the control server FOH process by the number of seconds specified. Valid entries range from 30 to 999. **Required Options:** You must select 'Enable EOD control server FOH process delay' to enable this option.

Automatic fileserver recovery at EOD — Allows you to control whether your file servers recover from redundancy automatically at EOD or manually at a time of your choosing.

Suppress checkout printing at EOD — Does not print a checkout as part of the EOD process for employees who did not run a checkout. The system still performs the checkout. **Documented Version:** v12.3.

Suppress clock-out printing at EOD — Does not print a clock-out chit as part of the EOD process for employees who did not clock out. The system still performs the clock-out. **Documented Version:** v12.3.

Force terminal reboot at EOD — Ensures that FOH terminals reboot after the EOD process runs. **Related Options:** This is helpful when you configure each terminal in Radiant Auto Loader to only log the user off and back on during a data refresh for quicker restarts. A full reboot at EOD fully resets the Windows memory. Note: If the local computer name is equal to the server system environment variable, such as an interface server on your file server, the system does NOT automatically reboot.

Run data integrity check at EOD — Supports data integrity checks between grind files and the Trans.log. If selected, (1) the system runs DataIntegrityCheck.exe, which creates a Balance.txt file and compares it to the grind files. If a difference exists among the two files, the system creates 'DataIntegrityException.txt' in the dated subfolder. (2) The system compares values within the grind files, and if a difference between values exists, the results are automatically added to DataIntegrityException.txt in the dated subfolder. Note: If a field does not exist in either Balance.txt or in the grind files, 'Unknown' appears in the field. If cleared, the system does not run the DataIntegrityCheck.exe. **Documented Version:** v14.1.

Group bar: End Of Day > Clean Personal Account Number data

Enable Personal Account Number cleanup — Enables the CleanPAN utility, an automated system process that removes sensitive credit card payment information from stored files, where present.

Number of days to retain — Specifies the number of days (equal to or less than 90) the system stores card information.

Group of tenders to exclude from cleanup — Designates the tenders group created for the purpose of excluding the tender group from CleanPAN processing. **Related Requirements:** Access Maintenance > Payments > Tender Groups to create the tender group to exclude from cleanup.

Group bar: End Of Day > Reports

Print Sales Summary report — Prints the FOH Sales Report at EOD.

Print Clock in/out report — Prints the FOH Clock In/Out Report at EOD.

Print Daily Summary report — Prints the FOH Daily Summary Report at EOD.

Print Quick Count report — Prints the Quick Count Report at EOD.



Reference

Refer to the [Quick Count Feature Focus Guide - HKS316](#) for more information on configuring and using Quick Count.

Report printer — Specifies the printer on which to print the selected POS reports at EOD.

Group bar: BOH settings

In Punch Edit, restrict jobcode to those assigned to employee — Limits job codes that you can select in Functions > Edit Punches to the job codes defined in Maintenance > Labor > Jobcodes.

Number of weeks back that punches can be edited — Specifies the maximum number of previous weeks you can edit punches. Select from one to four weeks. **Related Options:** To define the period start date, select a day in 'First day of the week' under the 'Day/Time' group bar on this tab.

Number of days that deposits can be edited — Limits the number of days, from 0 to 999, allowed to edit a deposit, which forces employees to edit deposits on a timely basis. The number you specify here controls the dates that appear in the Edit Deposits dialog box. The default value is zero, which indicates a limitless number of days. A value of one enables you to edit only the current day.

Documented Version: v15.1.

Disable auto-grind after EOD — Disables automatic data processing and summarizing of previous day activities. Select this option during the store's initial setup or when troubleshooting the Aloha installation.

Enable grind for Aloha Reporting — Enables the use of the Aloha Reporting SQL database and authorizes the Control service to launch the Grind function in real-time mode, regularly updating the Aloha Reporting SQL database based on the interval in 'Minutes between each grind.' Cleared by default upon upgrade from a previous version of the Aloha POS system. Clear this option until NCR announces the Aloha reporting framework as released and ready. **Documented Version:** v12.3.

Related Options: Selecting this option exposes and enables 'Minutes between each grind.'

Minutes between each grind — Designates the interval, in minutes, at which you desire the Grind function to run and update the Aloha Reporting database. The default value is five minutes (5). The minimum value is three minutes (3). **Documented Version:** v17.1. **Required Options:** You must select 'Enable grind for Aloha Reporting' to expose and enable this option.

Group bar: BOH Settings > Disk Maintenance

Low disk space warning threshold in MB — Specifies (in megabytes) the amount of available hard drive disk space remaining before the system provides a low disk space warning.

Number of days to keep dated subdirectories — Specifies the number of days to store dated subdirectories on the hard drive. During the EOD process, the system compares the current system date against dated subdirectories and removes (purges) dated subdirectories that are older than the number of days specified in this option. *Do not enter a value in this text box if you want to use the purge function, or if you do not perform regular backups.*

Do not delete archived files — Purges only files that have the 'Archive' attribute cleared (turned off). There are many ways in which to clear the 'Archive' attribute, but normally this is done by a third-party backup program. You do not normally select this option unless you are using a third-party program to perform regular backups. **Related Options:** When you create or change a file, Microsoft® Windows® turns on the 'Archive' file attribute. If you specify a number in 'Number of days to keep on drive,' and do not select 'Do not delete archived files,' during the EOD process, the system purges all dated subdirectories older than the number of days you specify. If you specify a number and you also select 'Do not delete archived files,' the EOD process does NOT purge any file for which the 'Archive' attribute is turned off, regardless if it is older than the number of days you specify.



Note

The system administrator should review the Disk Maintenance settings periodically, to verify that they are preventing unnecessary buildup of data on the file server. Verify with your accounting department that you are maintaining sufficient data.

Group bar: BOH Settings > Remote File Storage

Beginning with Aloha POS v14.1, the 'Remote File Storage' group bar does not appear. Going forward, the new Aloha Communication Layer (ACL) handles communication across the Aloha network as a single, comprehensive network communication solution. As soon as you install or upgrade to Aloha POS v14.1, the Aloha Communication Layer is active full-time across your Aloha network, requiring no configuration whatsoever. You can use a uniform network configure for each terminal, regardless of how many you have, and they become part of the network upon connection and start-up. The 'always on' feature allows you to concentrate on configuring the Aloha POS to address your business needs, and to designer you network to do exactly what you want it to do without having to worry about limitations imposed by the Aloha POS.



Note

If using a POS version earlier than POS v15.1, refer to the reference guide applicable to your version.

Group bar: Regional Settings

Allow employee identification field (SSN) to be alphanumeric — Enables up to nine alphanumeric characters you can enter for the Social Security number. This is important for countries that do not use the U.S.A. standard nine-digit Social Security number format.

Country / region — Indicates the method to use for expanding data text boxes. This accommodates regions which require extra characters for names, addresses, and phone numbers. Options include United States, United Kingdom, and Universal Format.

Use special currency — Indicates you are using a currency other than 'US Dollar.' The system overrides the standard decimal and monetary values and uses the values entered on this tab. The Aloha POS system ignores values entered in the International options unless you select this option.

Select country currency — Establishes the country for local currency. **Related Options:** You must select 'Use special currency' to enable this option.

ISO code — Shows the International Organization for Standardization (ISO) code for the currency you selected. The system uses the Iso4217.csv file located in the \Data directory to match the ISO code with the selected country. This option is read-only.

Number of digits — Specifies the number of digits that appear to the right of the decimal separator. Although 2 is the standard for North America, many nations require 3 digits to the right of the decimal separator. **Related Options:** You must select 'Use special currency' to enable this option.

Currency symbol — Denotes the symbol that indicates currency. North America uses a '\$' while England uses a '£.' If you leave this option blank, the system uses '\$.' Type a maximum of three characters. **Related Options:** You must select 'Use special currency' to enable this option.

Decimal separator — Denotes the non-numerical character used to separate the integral, or whole value from fractional value of a decimal numeral. For example, dollars versus cents. If you leave this option blank, the system uses a period (.). You cannot use the same character as used for 'Thousand separator' or an error message appears. **Related Options:** You must select 'Use special currency' to enable this option.

Thousands separator — Denotes the customary, non-numerical character used to separate numbers in thousands. For example, North America uses a comma (,) as the thousands separator; European custom is to use a period (.). You cannot use the same character as used for 'Decimal separator' or an error message appears. **Related Options:** You must select 'Use special currency' to enable this option.

Use large currency formatting — Displays the currency in large font.

Date separator 1 — Denotes the character to separate the first two options (such as / or -).

Date separator 2 — Denotes the character to separate the last two options.

Month digits — Specifies the number of digits for month. The default number is two.

Day digits — Specifies the number of digits for day. The default number is two.

Year digits — Specifies the number of digits for year. Set this to two or four digits. The default is four digits.

Date display order — Indicates the order in which the day, month, and year appear, based on regional custom.

YMD — Lists the date with the year first, followed by the month, then the day of the month.

DMY — Lists the date with the day of the month first, followed by the month, then the year.

MDY — Lists the date with the month first, followed by the day of the month and then the year. This is the default selection.

Sample date — Shows an example of how dates appear throughout the system, based on the selected order option (YMD, DMY, or MDY). This option is read-only.

Apply discount rounding for each item with comp or coupon — Applies rounding to each eligible item on the check to determine the discount, and then adds each item discount to calculate the total discount. If cleared, the system calculates the total discount based on the sum of all eligible items on the check and then distributes the discount to each eligible item. If rounding is necessary, the system applies the rounded amount to only one discounted item, usually the item with the largest discount. **Documented Version:** v14.1.

Fiscal national environment — Specifies the country whose fiscal regulations govern this Aloha POS system. **Related Options:** Selecting this option exposes the Fiscal Devices group bar in Maintenance > Hardware > Terminals > Terminal tab.

Group bar: Exports

Generate grind audit (GNDAUDIT) — Enables you to generate a file during the grind process called GndAudit.dbf. The grind process typically runs during the End-of-Day, or when you view reports. This file contains information you can use for troubleshooting and reporting, such as the number of times an employee reopens a check, reprints a check, deletes a promo, and more.

Grind non-sales Categories — Enables the system to include non-sales category information in the GndSales file. Due to the number of non-sales categories most installations use, this option requires additional disk space and processing time.

Create credit card detail polling file — Creates an export text file during a grind that lists details from credit card transactions.

Create gift card polling file — Creates an export text file during a grind that lists details from Aloha Stored Value gift card transactions. **Required Options:** To enable this option, access Maintenance > Business > Store > Store Settings tab > Gift Card/Certificate Sales group and select Aloha Stored Value from the 'Gift card/certificate provider' drop-down list under the 'Gift sales' group bar.

Create PDI export file — Creates a payroll export file during the grind process.

Include surcharges in Coconut Code export — Includes surcharges in the specified payroll export file created during the grind process.

Grind pizza topping quantity using parent pizza — Enables the grind process to deplete inventory for specialty pizzas based on the size of the parent item. For example, if a guest orders a large Meat Lover's specialty pizza, the system depletes the inventory for an entire Meat Lover's pizza because the specialty pizza item is the parent item; if a guest orders a large build-your-own (BYO) pizza, half Meat Lover's/half Supreme, the system depletes the inventory based on the parent item of Large BYO. Use this option if you do not sell fractional pizzas. **Documented Version:** v12.3.

Grind pizza topping quantity using fraction pizza — Enables the grind process to deplete inventory for specialty pizza items based on the fraction of the pizza item ordered by the customer rather than the size of the parent item. For example, if a guest orders a large BYO pizza, half Meat Lover's /half Supreme, the system depletes the inventory based on half a Meat Lover's pizza and half a Supreme pizza. Use this option if you sell fractional pizzas. **Required Options:** You must select 'Grind pizza topping quantity using parent pizza' to enable this option. **Documented Version:** v12.3.

Group bar: Exports > Electronic payroll

Use ADP — Specifies ADP as the active third-party payroll processor.

ADP Company # — Represents the three-digit ADP company number. You must obtain this number from ADP. **Required Options:** You must select 'Use ADP' to enable this option.

ADP Store # — Represents the ADP store number. You must obtain this number from ADP, and the store number is for use by chain operations only. **Required Options:** You must select 'Use ADP' to enable this option.

ADP Version # — Represents the ADP software version number. You must obtain this number from ADP. **Required Options:** You must select 'Use ADP' to enable this option.

Omit credit card tips — Eliminates credit card tips from the ADP export file. **Required Options:** You must select 'Use ADP' to enable this option.

Omit control totals — Works with early versions of ADP software that do not support control totals. **Required Options:** You must select 'Use ADP' to enable this option.

Do not output primary rate or jobcode — Excludes pay rates and job codes from the export file. **Required Options:** You must select 'Use ADP' to enable this option.

Output sales as whole dollars — Discloses sales in rounded, whole dollar amounts, rather than exact dollar and cent amounts. **Required Options:** You must select 'Use ADP' to enable this option.

Output cash tips — Includes cash tips in the ADP export file. **Required Options:** You must select 'Use ADP' to enable this option.

Include SSN in ADP export — Includes employee Social Security numbers in ADP payroll data. **Required Options:** You must select 'Use ADP' to enable this option.

Use PayUSA — Specifies PayUSA as the active third-party payroll processor.

Number of days per pay period — Represents the number of days in a PayUSA pay period. Valid entries range from 0 to 99. PayUSA currently requires this number be either 7 or 14. **Required Options:** You must select 'Use PayUSA' to enable this option.

Company code — Represents the assigned company code obtained from PayUSA. Valid entries range from 0 to 99. **Required Options:** You must select 'Use PayUSA' to enable this option.

Use Paychex — Specifies Paychex as the active third-party payroll processor. **Related Options:** For each employee, you must access Maintenance > Labor > Employees > Employee tab and define an 'Export ID' under the 'Personal information' group bar, to export employee data with Paychex.

The Paychex options are applicable to Paychex payroll processing only. The Paychex export file lists each job an employee works in a specified pay period. The job code ID identifies the jobs worked by an employee. The hours worked for each job code is summarized. For example, the regular hours and overtime hours are calculated by job code, then displayed as one record for each job worked during the pay period. The export file displays as a comma-delimited text file. The following table indicates the fields included in the export order. They are listed in the order in which they exist in the file.

Field	Import Size	Notes
Employee Number	1 - 9999	Uses the Export ID on Employee Maintenance
Department Number	1 - 9999	Uses the Job Code ID for the job that the employee worked.
Regular Hours	-999.99 - 999.99	Summary of regular hours worked for this Job Code ID.
Overtime Hours	-999.99 - 999.99	Summary of overtime hours worked for this Job Code ID.
Pay Rate	0 - 999.999	The pay rate for this Job Code ID.
Credit Card Tips	-9999.99 - 9999.99	Total credit card tips for this Job Code ID.
Declared Cash Tips	-9999.99 - 9999.99	Total cash tips declared for this Job Code ID.

Field	Import Size	Notes
Gross Wages	-.999999.99 - 999999.99	Total pay for this Job Code ID.

Number of days per pay period — Specifies the number of days in a Paychex pay period. Valid entries range from 0 to 99. Currently, Paychex requires either 7 or 14.

Paychex branch # — Represents the Paychex branch number. Valid entries range from 0 to 999. Use leading zeros if the branch number is less than three digits (*example*: 0050).

Paychex client # — Represents the four-digit (0 - 9999) Paychex client number.

Paychex site code — Represents the single-character Paychex site code. The site code is a code assigned to each location that exports Paychex payroll data.

Use Real World payroll — Specifies RealWorld Payroll as the active third-party payroll processor.

Include unpaid breaks in Coconut Code export — Includes unpaid breaks in the specified payroll export file created during the grind process.

Group bar: Fiscal Settings

Enable fiscal button on login screen — Enables you to launch the external Fiscal Manager application from a Fiscal Data button that appears on the FOH login screen to run a fiscal report requested by an auditor without having to log in to the system first. This is commonly used in an international environment. **Documented Version:** v14.1

Items may not be sold or discounted for less than — Establishes the lowest value, such as \$0.01, at which you can sell or discount items, essentially preventing you from selling an item for a zero price, even when the item is 100% discounted through a BOGO, coupon, package promo, and more. The system converts the price of the item to the amount stipulated here. **Documented Version:** v14.1.

Print total terminal sales on employee and drawer checkouts — Prints the total sales for each store on employee checkouts and drawer checkouts. This information assists international customers in complying with requirements to print the perpetual check counter on the guest check. **Documented Version:** v14.1.

Print checkout counter — Activates the check counter feature, which prints a unique sequential number for each check at the store. You must create a Counter.bin file, and place it in the root directory of the terminal, to use this feature. This information assists international customers in complying with requirements to print the perpetual check counter on the guest check. **Documented Version:** v14.1.

Print terminal sales report counter — Activates the terminal sales counter feature, which prints a unique sequential number for each terminal report at the store. This information assists international customers in complying with requirements to print the perpetual check counter on the guest check.

Documented Version: v14.1.

Enable Site Information button on login — Displays the Site Info button on the FOH login screen. This button allows an employee to provide the relevant information to the IT call center agent. If cleared, the Site Info button does not appear on the FOH login screen. **Documented Version:** v15.1.

Related Options: You can use the Report Site Information button function in Screen Designer to add the Site Info button to a panel of your choice.

Show only retry button on printing error — Removes the Exit button from the fiscal printer error message. The 'Retry' button is still available and the terminal remains on this screen until the communication errors are resolved. **Documented Version:** v15.1.

Group bar: Troubleshooting

Debug barcodes — Writes actions performed with a bar code scanner to the debouts.

Bypass errors on POS startup — Enables terminals to automatically fix corrupt transaction, printer, and video logs, and still remain operational. If errors appear in these logs, a notification message appears in red on the FOH.

Number of days to keep POS debouts — Specifies the number of days to keep the FOH-generated debouts on the file server. The system creates a debout file for each day with the naming convention, *Debout.yyyymmdd.nn*, where *yyymmdd* is the year, month, and day, and *nn* is the terminal number. Type '0' to create a debout for only the current day, and when the End-of-Day process occurs, the system deletes the file. Valid entries range from 0 to 999; however, 14 is the default.

Maximum POS debout size in megabytes — Specifies the maximum allowable size (in megabytes) for a debout file.

Record CAP Activities — Enables the Aloha POS system to record all Customer Activity Profile (CAP) activities.

Credit Card Group

Use the options in the Credit Card group to activate and define EDC requirements for the entire restaurant. This provides on-line credit card authorization, pre-authorization, verification, and settlement of credit card transactions. In addition, it provides a number of built-in management tools, such as real-time transaction tracking, maintaining transaction history files, and customized reporting functions.



Reference

Refer to the [Aloha EDC User Guide - HKS1618](#) for more information on configuring and using EDC.

Use the options in the Credit Card group to configure:

- Activating EDC and defining other requirements, such as whether employees can use the same credit card twice in one day.
- Automatically accepting mock authorizations, with a floordown amount, when the system cannot connect to EDC.
- Allowing employees to touch a single credit card button to process credit card transactions, instead of selecting a specific credit card type.
- The number of vouchers to print and the use of custom text lines for sales vouchers and refund vouchers.
- Which part, or all, of the credit card number to mask on the voucher.
- A ceiling amount to suppress the printing of the signature line on the voucher.

Group bar: EDC Setup

To allow for easier setup of Connected Payments, CFC performs the following automatically when a store is made active in the Connected Payments Active Stores applet:

- Selects 'Enable Electronic Draft Capture (EDC).'
- Selects 'Use Aloha EDC.'
- Selects 'Use Chip N Pin.'
- Clears 'Allow authorization when EDC is offline.'

Enable Electronic Draft Capture (EDC) — Activates EDC functionality.

Use Aloha EDC — Indicates you are using the Aloha EDC system in place of a third-party system.
Required Options: You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Use Chip N Pin — Indicates your processor supports chip and PIN cards and you wish to use this functionality. Chip and PIN cards contain an embedded microchip that contains encoded cardholder data. These cards are specifically constructed for interacting with Chip and PIN devices. **Required Options:** You must select 'Use Aloha EDC' to enable this option. **Related Options:** Selecting this option enables 'Minutes for EDC to wait before timeout.'

Minutes for EDC to wait before timeout — Specifies the number of minutes for EDC to wait for credit card authorization from the processor before timing out, forcing you to insert the card again or select another form of payment. **Required Options:** You must select 'Use Chip N Pin' to enable this option.

Only use track 2 credit card data — Designates the mag card reader you are using reads only track two of the magnetic stripe on the back of the credit card. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Do not allow force authorizations — Forces all credit card payments to be electronically approved rather than forced to tender. If cleared, the 'Force' button does not appear on the FOH Close screen. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Cannot use same credit card twice in the same day — Prohibits a guest from using the same credit card number for payment twice in the same business day. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option. **Related Options:** To provide an employee, such as a manager, the ability to apply a payment using the same credit card twice in the same day, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Adjust payments' under the 'Financial' group bar. When an employee without sufficient access attempts to apply the same credit card twice in the same day, the manager approval screen appears. **Documented Version:** v12.3.

Allow same credit card in same day if at or below minute threshold — Specifies the minimum threshold in minutes, from 0 to 9999, that a guest can use the same credit card multiple times for a purchase. If a guest uses the same credit card outside of the threshold, manager approval is necessary. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option. **Related Options:** To provide an employee, such as a manager, the ability to apply a payment using the same credit card twice in the same day, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Adjust payments' under the 'Financial' group bar. When an employee without sufficient access attempts to apply the same credit card twice in the same day, the manager approval screen appears. **Documented Version:** v12.3.

Allow same credit card in same day if greater than minute threshold — Specifies the maximum threshold in minutes, from 0 to 9999, that a guest can use the same credit card multiple times for a purchase. If a guest uses the same credit card outside of the threshold, manager approval is necessary. **Required Options:** You must select 'Enable EDC' to enable this option. **Related Options:** To provide an employee, such as a manager, the ability to apply a payment using the same credit card twice in the same day, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Adjust payments' under the 'Financial' group bar. When an employee without sufficient access attempts to apply the same credit card twice in the same day, the manager approval screen appears. **Documented Version:** v12.3.

Allow authorizations when EDC is offline — Allows the FOH to perform 'mock' authorizations for sales totaling less than a pre-defined amount if the EDC credit card server is down. When selected, if the FOH attempts to do a credit card authorization when the EDC server is down, a 'mock' authorization is done immediately and the transaction is spooled later for an actual authorization. An .spl file is created in the \EDC directory on the master terminal. As soon as the EDC file server becomes available, the EDC program on the server scans for spooled transactions (.spl files).



Note

The master terminal debout indicates any 'mock' authorizations that occur.

Maximum authorization amount — Indicates the maximum amount to authorize when credit card server is down. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Add this tip % to total for authorization — Designates the percentage of the order to add to the check total for authorization. For example, if this tip percentage is set to 15%, and a customer charges \$20.00 on a credit card, the authorization builds in 15% on top of the original \$20.00 for a total authorization of \$23.00. There is a leeway of + or - 20% for restaurants and + or - 15% for retail before a downgrade fee is charged. If a restaurant does not have tipping, type 0. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Display remaining card balance on partial approvals — Shows the remaining balance on pre-paid cards before finalizing a transaction. If the transaction amount exceeds the available balance on the card, guests can use the remaining balance on the card as partial payment of a transaction without the risk of being declined, and then pay the balance of the transaction using an alternate form of payment. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Display warning message when transaction is processed offline — Displays a message on the FOH when EDC cannot connect to the processor for authorization. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Authorize transactions less than 1.00 — Indicates you want to allow credit payments that are less than a dollar. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Include transactions authorized from BOH EDC on POS — Enables an employee to process BOH EDC transaction from the FOH. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Maximum amount of credit card refunds — Specifies the highest amount an employee can refund to a credit card.

Number of IC verify terminals — Specifies the number of ICVerify terminals to use. EDC interfaces with ICVerify terminals; however, First Data has announced end of life for the ICVerify software and no longer supports ICVerify devices. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Food stamp category — Specifies the category of items from which guests can make purchases using their EBT food benefits payment card. Most laws require you to exclude tobacco and alcohol items from this category. **Required Options:** You create categories in Maintenance > Menu > Categories.

Use Canadian Debit — Identifies the processor you are using to process debit cards in Canada. The Paymentech option is available for POS v6.5.1 and later. **Required Options: 1)** You must select 'Enable Electronic Draft Capture (EDC)' and 'Use Aloha EDC' to enable this option.

Show Last Settlement alert — Indicates a warning message appears on the Login screen letting you know you need to run a settlement. **Related Options:** Selecting this option enables 'Number of hours since last settlement.'

Number of hours since last settlement — Specifies the number of hours that must pass before you receive an alert to run a settlement. **Required Options:** You must select 'Show Last Settlement alert' to enable this option.

Tab or table name when customer name not found — Indicates how the system associates a name to a tab or table when track one is unreadable.

System names tab or table — Enables the system to associate a name with a tab or table when track one is unreadable, based on the first letter of the card type and the last four digits of the credit card number. For example, a tab named V5555 represents a Visa card with 5555 as the last four digits of the credit card.

Prompt user for tab or table name — Prompts you to enter the name to associate with a tab or table when track one is unreadable.

Enable point to point encryption and disable credit card entry on all POS terminals — Supports P2PE and prevents the reading of credit card track data from the MSR on POS terminals. **Related Options: 1)** This option exposes 'Allow payment data through FOH COM.' **2)** Selecting Voltage or TransArmor changes the PIN pads available to you in the 'Type' drop-down list under the 'PIN pad' group bar in Maintenance > Hardware > Terminals > Output Devices tab and exposes 'Customer-facing PIN pad' in that same location. **Documented Version:** v15.1.

Allow payment data through FOH COM — Allows Aloha Takeout (ATO), Aloha Online Ordering (AOO), and more to send standard credit card payments to the Aloha POS system; the payment processes successfully despite P2PE enabled at the store. If cleared, Aloha Takeout (ATO), Aloha Online Ordering (AOO), and others cannot send standard credit card payments to the Aloha POS system. The system rejects the transaction. **Required Options:** You must select 'Enable point to point encryption and disable credit card entry on all POS terminals' to enable this option. **Documented Version:** v15.1.

EMV processor — Forces employees and guests to insert or slide chip-enabled payment cards into a wireless PIN pad device to complete a transaction. If an employee attempts to slide the card using the MSR on a POS terminal, an error message, 'EMV enabled cards may not be swiped on POS terminals,' appears on the FOH; however, the employee can manually enter the payment card data at the POS terminal. **Related Options:** Selecting Moneris as the processor enables 'Allow standard credit card processing on POS terminals.' **Documented Version:** 14.1.

Allow standard credit card processing on POS terminals — Allows employees and guests to slide a chip-enabled card on a magnetic stripe reader (MSR) or enter the card number manually on the FOH only as a backup method. Selecting this option may impede EMV functionality and there are liabilities associated when you use a chip-enabled card as magnetic stripe card or you enter the card number manually on the FOH. If selected, you have the choice of an EMV liability warning message appearing on the FOH. **Required Options:** You must select 'Moneris' from the 'EMV processor' drop-down list to enable this option. **Related Options: 1)** Selecting this option enables 'Display EMV liability warning.' Select the option only if you want an alert to appear on the FOH each time you use a chip-enabled card as a magnetic stripe card or enter the card number manually in the FOH instead of using the Ingenico iPP320 PIN pad device. (Recommended). **Documented Version:** v15.1.

Display EMV liability warning — Enables the alert, 'Processing credit cards at this POS terminal could result in liabilities and fees due to EMV requirements. Would you like to proceed?' to appear on the FOH each time you use a chip-enabled card as a magnetic stripe card, or enter the card number manually in the FOH. **Required Options:** You must select 'Allow standard credit card processing on POS terminals' to enable this option.

Disable credit card adjustments — Prevents an employee from making an adjustment to a credit card amount. If selected, the 'Credit card adjustments are disabled' error message appears on the FOH, if an employee attempts to adjust the payment. The Adjust and Adjust Tips buttons are not available on the Tender screen. If cleared, the FOH allows adjustments as per existing functionality. **Related Options:** If you access Maintenance > Electronic Draft Capture > Processor > Options tab and select both 'Disable credit card adjustments' and 'Disable adjustments' under the 'Options' group bar, the system prevents an employee from adjusting a processed credit card payment. If you select 'Disable credit card adjustments' and clear 'Disable adjustments,' the FOH prevents the employee from adjusting the processed credit card payment. If you clear 'Disable credit card adjustments' and select 'Disable adjustments,' the employee can adjust the processed credit card payment; however, EDC stops the transaction and an 'Adjustments were disabled at the time of this transaction' error message appears in EDC. **Documented Version:** v15.1.

Process gift cards using EDC — Allows Connected Payments to process credit cards while Aloha EDC processes gift cards. **Related Requirements: 1)** You must use Connected Payments as your payment application and configure Aloha EDC for gift cards on your system. **2)** Your security key must be licensed for Credit Card + MX and Gift Card + MX under Software Packages, and possibly Custom EDC under Software Options, depending on the processor you use for redeeming your gift cards.

Apply approved partial payment with insufficient funds — Allows you to process a credit card for a partial amount when the card does not have sufficient funds to cover the full amount of the guest check. You can select the next payment amount without the POS assuming it is the same payment type. **Related Options:** Effective with CFC/AM v18.4, you do not have to select 'Uses Connected Payments' in Maintenance > Business > Installed Products to expose this option and this option was relocated to the EDC Setup group bar, where it is more appropriate.

Group bar: Voucher print settings

Print mandatory processor vouchers — Enables processor-specific requirements that must appear on the voucher. Currently, Moneris is the only processor with specific voucher requirements.

Print a voided credit card slip when payment is deleted — Prints a voided receipt from the original credit card transaction when you delete a credit card payment. The voucher reflects the full amount that was deleted, including the tip amount.

Suppress cardholder name — Does not print the name of the card holder on the credit card voucher. When using a magnetic card reader, the system replaces the 'Magnetic Card present: <cardholder name>' line on the voucher with 'Magnetic Card present: Yes.' **Required Options:** You must select the number of vouchers to print from 'Number of voucher copies to print' under this group box to utilize this feature.

Mask 'Not Applicable' card types — Masks numbers on the voucher, reprinted guest checks, and the Payment report, from non-industry standard card types, such as Gift Cards and Private Label Cards. **Related Options:** Define a generic credit card type in Maintenance > Payments > Tenders and designate it as Not Applicable, to use this feature.

Use custom Canadian debit vouchers — Indicates the system can use Canadian vouchers for card payments.

Voucher printer for declined cards — Designates the printer at which to print a voucher when a card is declined, regardless of signature rules you have in place that may prevent printing the voucher. This is helpful in environments for which there is no immediate interaction with the guest and you want to ensure someone sees and intercepts the decline voucher, such as when a guest places an order using Aloha Online Ordering and 'instant approval' is not in use. It is also helpful when you process payment information later, such as for future orders with saved credit card information. This provides you the opportunity to let the guest know to bring another form of payment. **Documented Version:** v14.1.

Limit declined card voucher printing to Labor Group — Prints a decline voucher only when the order originates from a specific labor group. Labor groups consist of specific job codes. This feature is helpful in situations where a guest is not present or is on the telephone, such as with Aloha Online Ordering when instant approval is not in use, or for future orders with saved credit card information. You do not need to select this option in environments where the decline message appears on the on-screen guest check, prompting you to request another form of payment.

Signature not required for Swiped Cards — Applies signature rules to transactions for which you use a magnetic stripe reader to capture the payment card information. Clear this option to ignore signature rules and require a signature for all transactions for which you use a magnetic stripe reader to capture payment card information. **Required Options:** You must type an amount greater than 0.00 in 'Signature not required if check total is less than this amount,' to enforce signature rules. **Documented Version:** v12.3.

Signature not required for Tapped Cards — Applies signature rules to transactions for which you use an RFID reader to capture the payment card information. Clear this option to ignore signature rules and require a signature for all transactions for which you use an RFID reader to capture payment card information. **Required Options:** You must type an amount greater than 0.00 in 'Signature not required if check total is less than this amount,' to enforce signature rules. **Documented Version:** v12.3.

Signature not required for Manually Entered Cards — Applies signature rules to transactions for which you manually enter the payment card information. Clear this option to ignore signature rules and require a signature for all transactions for which you manually enter the payment card information. **Required Options:** You must type an amount greater than 0.00 in 'Signature not required if check total is less than this amount,' to enforce signature rules. **Documented Version:** v12.3.

Require signature when transaction is approved offline — Ignores signature rules and requires a signature for all payment card transactions processed while the system is in offline mode and cannot connect to the processor for approval. Clear this option to apply signature rules to transactions processed offline. **Related Options:** Selecting this option enables 'Print when transaction is approved offline.' **Documented Version:** v12.3.

Print when transaction is approved offline — Ignores signature rules and prints a voucher for payment card transactions processed while the system is in offline mode and cannot connect to the processor for approval. **Required Options:** You must select 'Require signature when transaction is approved offline' to enable this option.

Signature not required if check total is less than this amount — Specifies the purchase amount up to which you do not require a guest signature on the credit card voucher. Signature rules apply to any transaction amount equal to or more than this amount. **Documented Version:** v12.3.

Number of voucher copies to print — Designates the number of vouchers (0 to 4) to print for each transaction. If using a printer with preprinted vouchers and carbon paper or carbonless copy paper, set this value to 1. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Print first voucher with guest check — Combines the information for the customer voucher (first voucher that prints) with the guest check, reducing the amount of paper required for PIN pad payments only. Please note, this option is for use with EMV Moneris only. **Documented Version:** v19.3.

Text to print on first voucher copy — Designates the text to print on the first voucher copy.

Text to print on second voucher copy — Designates the text to print on the second voucher copy.

Text to print on third voucher copy — Designates the text to print on the third voucher copy.

Text to print on fourth voucher copy — Designates the text to print on the fourth voucher copy.

Number of vouchers to print if check amount less than signature amount — Denotes the number of vouchers (0 to 4) to print for each transaction where the check amount is less than the amount for which you require a signature line to print. **Required Options: 1)** You must type an amount greater than 0.00 in 'Signature not required if check total is less than this amount,' to enforce signature rules. **2)** To designate a tender that must respect signature rules, access Maintenance > Payments > Tenders > Authorization tab and select 'Signature lines,' 'Vouchers,' or 'Both' from the 'Print when the signature ceiling is met or exceeded' drop-down list under the 'Authorization' group bar. **Related Options:** Up to four options appear depending on the number you type from which you select the voucher or vouchers for which you want to print a signature line. **Documented Version:** v12.3.

Print signature line on first voucher — Prints a signature line on the first voucher for each transaction where the check amount is less than the signature amount. For example, if you want a signature line to print on the store copy but not the guest copy and the first voucher is the copy designated for the store, select this option for the first voucher and clear it for the second voucher. **Required Options:** You must type a number greater than 0 (zero) in 'Number of vouchers to print if check amount less than signature amount' to enable this option. **Documented Version:** v12.3.

Print signature line on second voucher — Prints a signature line on the second voucher. **Required Options:** You must type a number greater than 1 in 'Number of vouchers to print if check amount less than signature amount' to enable this option.

Print signature line on third voucher — Prints a signature line on the third voucher. **Required Options:** You must type a number greater than 2 in 'Number of vouchers to print if check amount less than signature amount' to enable this option.

Print signature line on fourth voucher — Prints a signature line on the fourth voucher. **Required Options:** You must type a number greater than 3 in 'Number of vouchers to print if check amount less than signature amount' to enable this option.

Number of vouchers to print if check amount at or above signature amount — Denotes the number of vouchers (0 to 4) to print for each transaction where the check amount is equal to or more than the amount for which you require a signature line to print. **Required Options: 1)** You must type an amount greater than 0.00 in 'Signature not required if check total is less than this amount,' to enforce signature rules. **2)** To designate a tender that must respect signature rules, access Maintenance > Payments > Tenders > Authorization tab and select 'Signature lines,' 'Vouchers,' or 'Both' in the 'Print when the signature ceiling is met or exceeded' drop-down list under the 'Authorization' group bar. **Related Options:** Up to four options appear from which you select the voucher for which you want to print a signature line. **Documented Version:** v12.3.

Print signature line on first voucher — Allows you to designate on which voucher you want a signature line to print for each transaction where the check amount is equal to or more than the signature amount. For example, if you want a signature line to print on the store copy but not the guest copy and the first voucher is the copy designated for the store, select this option for the first voucher and

clear it for the second voucher. **Required Options:** You must select a number greater than 0 (zero) in 'Number of vouchers to print if check amount at or above signature amount' to enable this option. **Documented Version:** v12.3.

Print signature line on second voucher — Prints a signature line on the second voucher. **Required Options:** You must type a number greater than 1 in 'Number of vouchers to print if check amount at or above signature amount' to enable this option.

Print signature line on third voucher — Prints a signature line on the third voucher. **Required Options:** You must type a number greater than 2 in 'Number of vouchers to print if check amount at or above signature amount' to enable this option.

Print signature line on fourth voucher — Prints a signature line on the fourth voucher. **Required Options:** You must type a number greater than 3 in 'Number of vouchers to print if check amount at or above signature amount' to enable this option.

Print check at master terminal printer when voucher prints — Prints an additional check at the master printer whenever a voucher prints at the voucher printer. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Print check message on voucher — Prints the guest check message text on credit vouchers. **Related Options:** To define a guest check message, select Maintenance > Messaging > Guest Check Messages. **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Print footer message on voucher — Designates which guest check message to appear in a customized footer on the credit card voucher, when you are required to include a legal declaration on credit card vouchers stating that the guest is responsible for paying their debt.

Print large text on voucher — Prints the text on the voucher in a larger font size. **Related Options:** To disable this option, access Maintenance > Business > Store > Store Settings tab > System group and select 'Use large currency formatting' under the 'Regional Settings' group bar.

Use custom text on sales voucher — Enables custom text to print on the sales voucher. Type up to 40 characters in each text box to print above the signature line, such as 'Your account will be debited,' in the first text box, and 'with the above amount,' in the second text box. Type up to 40 characters in the text box signature text box, such as 'Cardholder signature.' **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Custom text line 1 — Indicates the user-defined text to appear on line one of a sales voucher. Type a maximum of 40 characters. **Required Options:** You must select 'Use custom text on sales voucher' to enable this option.

Custom text line 2 — Indicates the user-defined text to appear on line two of a sales voucher. Type a maximum of 40 characters. **Required Options:** You must select 'Use custom text on sales voucher' to enable this option.

Text after signature line on sales voucher — Indicates the text to appear after the signature line on a sales voucher. **Required Options:** You must select 'Use custom text on sales voucher' to enable this option.

Use custom text on refund voucher — Enables custom text to print on the refund voucher. Type up to 40 characters in each text box, such as 'Your account will be credited,' in the first text box, and 'with the above amount,' in the second text box. Type up to 40 characters in the text box signature text box, such as 'Merchant signature.' **Required Options:** You must select 'Enable Electronic Draft Capture (EDC)' to enable this option.

Custom text line 1 — Indicates the user-defined text to appear on line one of a refund voucher. Type a maximum of 40 characters. **Required Options:** You must select 'Use custom text on refund voucher' to enable this option.

Custom text line 2 — Indicates the user-defined text to appear on line two of a refund voucher. Type a maximum of 40 characters. **Required Options:** You must select 'Use custom text on refund voucher' to enable this option.

Text after signature line on refund voucher — Indicates the text to appear after the signature line on a refund voucher. **Required Options:** You must select 'Use custom text on refund voucher' to enable this option.

Message to print for prepaid cards — Designates the guest check message created specifically to print a legal disclaimer on credit card vouchers for guest checks paid with a prepaid payment card. **Required Options: 1)** To enable this message to print on vouchers, access Maintenance > Payments > Tenders > Authorization tab, select a card type as the tender, and clear 'Do not print vouchers' under the 'Authorization' group bar. **Related Requirements:** Access Maintenance > Messaging > Guest Check Message to create a legal disclaimer message to print for prepaid cards.

Group bar: Connected Payments

The options under the 'Connected Payments' group bar are exposed even when you clear 'Uses Connected Payments' under the 'Products installed' group bar in Maintenance > Business > Installed Products.

Store ID — Identifies the store using Connected Payments.

Company ID — Designates the ID of the company under which the store operates.

EDC path on the BOH server — Designates the path required to access the EDC application on the BOH site controller.

Authorization screen max timeout — Specifies the maximum amount of time, in minutes, the system waits for authorization before timing out. Valid entries range from one to four minutes, with two minutes being the default value.

Delivery Group

Use the Delivery group to establish delivery order types and policies for operations that offer delivery service. This group appears only if you are licensed to use the Delivery/Frequent Buyer (D/FB) program to track sales history for customers. D/FB also provides the ability to set up different programs to reward the guest, and encourages guests to buy more frequently with the use of coupons and bonus plans.

You can define the following:

- Requirements for using Delivery, such as the maximum delivery fee, self-assigned orders, and the number of caller ID lines.
- Requirements, such as defaulting to the last order, printing an itinerary, and changing the font used in the customer selection screen and the Delivery screen.
- Order modes to associate with delivery, discounts, and petty cash accounts for driver cash account posting.

Group bar: Setup

Enable Aloha Delivery — Enables the Aloha Delivery program for use in the restaurant.

Display on-screen keyboard — Displays a keyboard on the customer lookup and information screens when the Aloha system accesses the Delivery/Frequent Buyer program. You must select this option if the terminal does not have an external keyboard. **Required Options:** You must select 'Enable Frequent Buyer' or 'Enable Aloha Delivery' to enable this option.

Default look-up method — Specifies the criteria the system uses to search for a customer already in the database. Select from Phone Number, Last Name, Company Name, or Card Number.

Default to last order placed by customer — Causes the system to open a new order, with the same order last placed by the customer. The customer lookup process must occur before opening a new order, for this to work.

Naming method for delivery orders — Determines the term the system uses to name the order on the guest check. Valid options are Default, Phone, or Name. If you select Default, the system uses the term defined in 'Default look-up method' to name the order.

Delivery order mode — Specifies the order mode for an order to be delivered to the customer at their location.

Call-in order mode — Specifies the order mode for an order originating from a customer who called on the telephone to place an order to be picked up later.

Walk-in order mode — Specifies the order mode for an order originating from a customer who entered the restaurant and placed the order in person, to wait for and pick up.

Maximum delivery fee — Establishes the maximum amount the restaurant charges to deliver orders.

Maximum number of orders a driver can self-assign — Determines the maximum number of orders drivers can assign to themselves at one time. **Required Options:** You must access Maintenance > Labor > Jobcodes > Order Entry tab and select 'Can assign orders to self' under the 'Delivery' group bar and assign the job code to the employee.

Number of caller ID lines — Specifies the number of Caller ID buttons that appear on the Customer Lookup screen. Use this feature to insert one button for each Caller ID line installed in the restaurant that is connected to the system.

Post delivery receipt printer — Specifies the printer upon which Aloha prints post-delivery receipts.

Print check when transferred to driver — Causes the system to print the guest check to give to the customer, when the dispatcher transfers the order to a driver.

Print itinerary of driver orders upon sign-out — Causes Aloha to print the driver itinerary for each order, as they sign out of Aloha to make assigned deliveries.

Require driver to perform cash-in upon sign-in — Requires drivers to turn in store-owned cash upon signing back in from completing deliveries.

Driver cash in account — Specifies the account to which the program credits cash returned from delivery orders.

Driver cash out account — Specifies the account from which the program deducts cash disbursed to drivers for making change while making deliveries.

Automatically close orders to cash upon driver sign-in — Causes delivery orders to close to cash immediately, when a driver signs in after making deliveries. If cleared, you must close delivery orders as normal. **Related Options:** Selecting this option enables 'Cash tender.'

Cash tender — Specifies the tender option available to the delivery driver for cash transactions. We recommend you select 'Exact' so the Aloha POS system will require the exact amount of cash for cash transactions when the driver signs-in. **Required Options:** You must select 'Automatically close orders to cash upon driver sign-in' to enable this option.

Print detailed delivery order information on checkout — Adds specific optional information about delivery orders to the driver checkout, such as gate codes for apartments complexes.

Group bar: Display Options

Customer Selection screen font size — Determines the size of letters the system uses to show customer names on the Select Customer screen, resulting from a search in the delivery database.

Manage Orders screen font size — Determines the size of letters the system uses to show orders and order status on screens that show lists of delivery orders.

Group bar: External Application

Allow user to launch external application — Enables the Aloha system to launch a third-party program, such as opening an external accounting program.

External application button text — Specifies the text to appear on the external application program button. Use the '\n' string to break the button text into multiple lines, as required. For example, type 'Top\nBottom,' to get these two words to appear on two separate lines on the button, with the first word above the second word.

Windows path — Specifies the drive letter and path to the specific program file that launches the third-party program, including the program name, and any required command-line arguments. Use double-quotes to enclose the contents of this text box, if necessary, to facilitate the operation of the program.

Pass customer ID to application — Causes the Aloha system to pass customer ID information to the third-party program. Use this feature, if required by the third-party program.

Gift Card/Certificate Sales Group

Use the Gift Card/Certificate Sales group to establish the type of gift cards or gift certificates you sell. The Aloha system supports the following types:

- Basic Gift Certificates
- Aloha Gift Certificate Manager
- Aloha Stored Value
- Fifth Third Bank
- Paymentech
- Stored Value Systems
- ValueLink

Gift Card/Certificate types

Aloha gift certificate is an Aloha Back Office product and requires a security key license. You set the rules for gift certificates in advance, making it easier to sell and redeem them. You need no forms or manual design, and you can create or inventory preprinted gift certificates easily. The system tracks each certificate you issue and redeem to reduce the risk of missing certificates and compromising security.

Basic gift certificate is an internal feature within the Aloha system used to track paper gift certificates. The Basic Gift Certificates feature does not require a security key license.

Aloha Stored Value is a feature of the Aloha Marketing product that allows you to sell and redeem plastic gift cards. It provides an extensive list of features, such as providing the ability to overpay

when redeeming, requiring employees to enter gift cards with a mag card reader, and more. With Aloha Stored Value, you do not need a credit card processor to transfer transactions.

Paymentech is used as a host to sell and redeem plastic gift cards, as well as acting as its own credit card processor. It provides a variety of features for gift cards, such as entering a range of gift cards using the Range feature, offline transactions, and more.

Stored Value Systems is used as a host to sell and redeem plastic gift cards, as well as acting as its own credit card processor. It provides a variety of features for gift cards, such as supporting offline transactions.

Value Link is used as a host to sell and redeem plastic gift cards, using either the CES (First Data South) or Nabanco (First Data North) credit card processors. It provides a variety of features, such as enabling preauthorization, offline transactions, and more.

Private Label is used as a host to sell and redeem plastic gift cards.

Heartland Payment Systems is used as a host to sell and redeem plastic gift cards.

Group bar: Gift sales

Gift card/certificate provider — Specifies the type of gift card or gift certificate program you want to implement at your restaurant.

Store number for IVR redemptions — Indicates the unit number of the store, when using Stored Value Systems gift cards. Use this option to associate the store number for offline transactions, when using Stored Value Systems gift cards. **Required Options:** You must select 'Stored Value Systems' in 'Gift card/certificate provider' to enable this option.

IVR phone number — Indicates the phone number of the store, when using Paymentech gift cards. **Required Options:** You must select 'Paymentech' in 'Gift card/certificate provider' to enable this option.

Group bar: Gift card settings

The 'Gift card settings' group bar and options appear for all providers except 'Aloha gift certificate' and 'Basic gift certificate.'

Requires card to be swiped upon activation — Prevents the employee from manually entering a gift card number when they sell a gift card. The system prompts for a manager password when the employee attempts to manually enter the number. **Required Options:** You must select a gift card provider to enable this option. **Related Options:** To override this option for certain employees and allow them to enter the gift card number without manager approval, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Manual card number' under the 'Financial' group bar, and then assign that access level to an employee.

Quantity sales method — Enables the Activate Range functionality for you to sell a range of gift cards in one transaction, thereby reducing the transaction fees charged by the host. If these options are disabled, the gift card does not support the Activate Range functionality.

Prompt for each card number — Requires you to sell gift cards in the FOH by entering each card number one card at a time.

Activate range by entering first card number — Enables you to sell a range of cards in the FOH by entering the first card number in a series and a quantity. The system sends a request for the card and all cards following it, based on the quantity. **Related Options: 1)** This option is disabled if you select 'Prompt for each card number.' **2)** This option is disabled if you select 'Stored Value Systems' as your provider.

Activate range by entering first and last card number — Enables you to sell a range of cards in the FOH by entering the first card and then the last card number in a series. The system sends a request for all card numbers between, and including, the first and last card. **Related Options: 1)** This option is disabled if you select 'Prompt for each card number.' **2)** This option is disabled if you select 'Stored Value Systems' as your provider.

Maximum cards per range — Specifies the maximum number of cards in a range that you can sell. **Related Options:** Selecting 'Prompt for each card number' disables this option.

Group bar: Printing properties

Print gift certificate when check is closed instead of at time of sale — Waits until the end of the sale after processing the payment to print the gift certificate instead of printing it when you add the gift certificate item to the guest check. **Required Options:** You must select 'Basic gift certificate' as the provider to enable this option.

Print sold and void details for gift certificates on server checkout — Includes a detailed list of gift cards or gift certificates sold and voided on the checkout report. **Required Options:** You must select 'Basic gift certificate' as the provider to enable this option.

Card number masking method — Determines the portion of the gift card number to print on the voucher. All other numbers are masked and do not print for the guest. Select from Select from 'Always show full number,' 'Show last 4 digits except on first voucher,' and 'Show last 4 digits on all vouchers.'

Group bar: Printing properties > Voucher

Print guest check message — Prints additional text on each voucher.

Print large text — Prints the voucher text in large fonts.

Print tip line — Includes a line at the bottom of the voucher so the guest can add gratuity.

Number of copies — Denotes the number of vouchers to print for each gift card redemption. The number you select determines the number of corresponding voucher text boxes that appear. When you indicate the number of copies you want to print, up to four additional options appear, to define the text that prints on each voucher.

Text to print on voucher 1 — Holds the text to print on each gift card voucher in separate 'Voucher' options. Common examples are 'Customer Copy' and 'Restaurant Copy.' **Required Options:** You must select a number greater than 0 in 'Number of copies' to enable this option.

Text to print on voucher 2 — Holds the text to print on each gift card voucher in separate 'Voucher' options. Common examples are 'Customer Copy' and 'Restaurant Copy.' **Required Options:** You must select a number greater than 1 in 'Number of copies' to enable this option.

Text to print on voucher 3 — Holds the text to print on each gift card voucher in separate 'Voucher' options. Common examples are 'Customer Copy' and 'Restaurant Copy.' **Required Options:** You must select a number greater than 2 in 'Number of copies' to enable this option.

Text to print on voucher 4 — Holds the text to print on each gift card voucher in separate 'Voucher' options. Common examples are 'Customer Copy' and 'Restaurant Copy.' **Required Options:** You must select a number greater than 3 in 'Number of copies' to enable this option.

Group bar: Restrictions

Cannot redeem same gift card twice in a day — Prevents the redemption of the same gift card more than once in the same business day. **Related Options:** To override this restriction, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Override gift card restrictions' under the 'Financial' group bar. **Documented Version:** v12.3.

Cannot activate and redeem gift card on same day — Prevents the redemption of a gift card on the same business day on which the card is activated. **Related Options:** To override this restriction, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Override gift card restrictions' under the 'Financial' group bar. **Documented Version:** v12.3.

Allow refund transactions for activations and reloads — Enables you to perform a refund for a customer who wishes to return a private label gift card they have purchased or remove additional funds loaded on their private label gift card. **Required Options:** You must select Private Label from the 'Gift card/certificate provider' drop-down list to enable this option. The system supports this functionality for Givex private label gift cards only.

Restrict multiple redemptions of the same gift card on a single check — Prevents redeeming the same gift card more than once on the same check. Select this option if the back-end system of the site cannot process multiple redemptions using the same gift card on the same guest check. **Related Options:** To allow an employee to override this restriction and allow multiple redemptions using the

same gift card on the same guest check, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Override gift card restrictions' under the 'Financial' group bar. **Documented Version:** v14.1.

Restrict multiple add values of the same gift card on a single check — Prevents you from using the same gift card for more than one add value transaction on the same check. Select this option if the back-end system of the site cannot process multiple add values for the same gift card on the same guest check. **Related Options:** To allow an employee to override this restriction and allow multiple add values, including the initial purchase value, for the same gift card on the same guest check, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Override gift card restrictions' under the 'Financial' group bar. **Documented Version:** v14.1.

Restrict activation of gift card until tendered — Prevents activating or reloading a gift card until you receive payment and the guest check has a \$0.00 balance. If activation or reload fails, the Aloha POS system sends an immediate reversal to the guest check, preventing over-payment. You cannot activate multiple gift cards when using NPG if you select this option. **Documented Version:** v14.1.

Group bar: Aloha Stored Value

Complete Aloha Loyalty processing before applying payment — Forces the Aloha POS system to complete the Loyalty member assignment before applying a tender to the guest check tender.

Campus Card Group

The options in this group control processing for a specific type of prepaid card.

Group bar: Campus Card settings

Allow offline processing — Allows automatic approval of transactions with offline authorizations, when the terminal cannot connect to the host for an electronic response.

Maximum amount while processing offline — *Specifies the maximum amount the system can automatically approve while the terminal is offline.* **Required Options:** You must select 'Allow offline processing' to enable this option.

Suppress offline processing indicators — *Suppresses the alert that appears indicating the system is operating offline.* **Required Options:** You must select 'Allow offline processing' to enable this option.

Group bar: Printing properties

Print campus card when check is closed instead of at time of sale — Waits until the end of the sale after processing the payment to print the campus card instead of printing it when you add the campus card to the guest check.

Print sold and void details for campus cards on server checkout — Includes a detailed list of campus cards sold and voided on the checkout report.

Card number masking method — Determines the portion of the campus card number to print on the voucher. All other numbers are masked and do not print for the guest. Select from 'Always show full number,' 'Show last 4 digits except on first voucher,' and 'Show last 4 digits on all vouchers.'

Group bar: Printing properties > Voucher

Print guest check message — Prints additional text on each voucher.

Print large text — Prints the voucher text in large fonts.

Print tip line — Includes a line at the bottom of the voucher so the guest can add gratuity.

Number of copies — Denotes the number of vouchers to print for each redemption. The number you select determines the number of corresponding voucher text boxes that appear. When you indicate the number of copies to print, up to four additional options appear, to define the text that prints on each voucher.

Text to print on voucher 1 — Holds the text to print on each gift card voucher in separate 'Voucher' options. Common examples are 'Customer Copy' and 'Restaurant Copy.' **Required Options:** You must select a number greater than 0 in 'Number of copies' to enable this option.

Text to print on voucher 2 — Holds the text to print on each gift card voucher in separate 'Voucher' options. Common examples are 'Customer Copy' and 'Restaurant Copy.' **Required Options:** You must select a number greater than 1 in 'Number of copies' to enable this option.

Text to print on voucher 3 — Holds the text to print on each gift card voucher in separate 'Voucher' options. Common examples are 'Customer Copy' and 'Restaurant Copy.' **Required Options:** You must select a number greater than 2 in 'Number of copies' to enable this option.

Text to print on voucher 4 — Holds the text to print on each gift card voucher in separate 'Voucher' options. Common examples are 'Customer Copy' and 'Restaurant Copy.' **Required Options:** You must select a number greater than 3 from 'Number of copies' to enable this option.

Group bar: Restrictions

Restrict multiple redemptions of the same campus card on a single check — Prevents redeeming the same campus card more than once on the same check. Select this option if the back-end system of the site cannot process multiple redemptions using the same campus card on the same guest check.

Restrict multiple add values of the same campus card on a single check — Prevents you from using the same campus card for more than one add value transaction on the same check. Select this option if the back-end system of the site cannot process multiple add values for the same campus card on the same guest check.

Quick Count Group

The options in this group control how the system handles Quick Count functionality.



Reference

Refer to the [Quick Count Feature Focus Guide - HKS316](#) for more information.

Group bar: Options

Enable quick count — Activates the Quick Count functionality. **Required Options:** To expose this option, access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display quick count' under the 'Options to display' group bar. **Related Options:** This option exposes the rest of the Quick Count options.

Rollover count totals at end-of-day — Designates all count totals to roll over to opening counts for the next day, when the EOD runs. For example, if you have 10 Waste counts when the EOD runs, then the following day you will have 10 waste counts again. **Required Options:** You must select 'Enable quick count' to enable this option. **Related Options:** If you select both 'Rollover count totals at end-of-day' and 'Automatically calculate and set opening count,' the system performs the Rollover Count function, unless you manually enter the closing counts in the FOH. If you manually enter the closing counts, they become the opening counts for the next day.

Automatically calculate and set opening count — Calculates closing counts for the current day, and the closing counts become the opening counts for the next day, when the EOD runs. **Required Options:** You must select 'Enable quick count' to enable this option. **Related Options:** If you select both 'Rollover Count totals at end-of-day' and 'Automatically calculate and set opening count,' the system performs the Rollover Count function, unless you manually enter the closing counts in the FOH. If you manually enter the closing counts, they become the opening counts for the next day.

Enable projection reports — Activates projection reporting and gives you the ability to view them on the FOH. You must add the available buttons to a panel to display on the FOH. **Required Options:** You must select 'Enable quick count' to enable this option and begin accumulating data for Quick Count reporting. The reports are not meaningful to you until you activate the feature and then accumulate approximately three weeks of historical data (dated subs).

Number of weeks to project — Indicates the number of past weeks, up to eight weeks, to use when calculating sales projections. The default value is one week. **Required Options:** You must select 'Enable quick count' to enable this option.

Minimum time interval to project in minutes — Indicates the minimum time interval (5, 15, 30, or 60 minutes) in which you want the system to calculate the FOH report. The system displays the number of items sold in the specified time interval. The smaller the interval, the longer it takes the system to build the database. We recommend using a low number for the minimum time interval, such as 5,

even though it might take longer to build. You cannot change the time interval in the FOH to a smaller interval than the interval specified in this option. **Required Options:** You must select 'Enable quick count' to enable this option.

Print waste chits — Prints a waste chit each time an item waste count updates. **Required Options:** You must select 'Enable quick count' to enable this option.

VideoMX Group

Use the Video MX group only if you use a third-party video software provider, such as QSR and Progressive. NCR no longer supports the Aloha video solution that integrates with the Aloha POS using VideoMX. Instead, we offer NCR Aloha Kitchen, the latest generation of kitchen productivity software.

If using a third-party video software provider, use the options in the VideoMX group to define:

- If orders display as they are ordered, one order behind, or when the order is finalized and tendered.
- The number of seconds before an order becomes an aged order, and when an aged order becomes an old order.
- Color and text attributes to associate with certain item types, such as the aged order background, voided items, modifier codes, and the summary order background.

Group: Setup

Enable VideoMX — Enables the use of video screens in place of, or in addition to, printers. Ordered items appear on designated video screens. Selecting this option enables the remaining options on the screen. You must select this option for the video system to work. **Required Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Enable VideoMX' under the 'Options to display' group bar.

Code page — Enables the video to use a set of character codes for another language with the kitchen video display.

Number of seconds until order becomes aged — Defines how long an order displays on the screen before it is considered an aged order. This is important because aged orders can display in a certain color to alert the kitchen that the order has been sitting on the screen too long.

Number of seconds until order becomes old — Defines how long an order displays on the screen before it is considered an old order. An old order is considered older than an aged order. An old order can also be set up to display in a different color than either the current or aged orders.

Number of seconds until order is automatically bumped — Indicates the number of seconds before the POS system automatically bumps a sent check from a video screen. (The system pushes back, or bumps, sent checks when there is no action taken on the check.) Once an order has been bumped, it can be recalled, unless it has already been deleted. This is disabled if set to '0'.

Number of seconds until bumped orders are automatically deleted — Indicates the number of elapsed seconds before the POS system completely removes a check from a video screen. The system stores up to 16 bumped orders. This option does not go into effect until the 17th bumped order is stored. This is disabled if set to '0'.

Beep only when items are displayed — Enables the video display system to beep only when an order containing items configured to display in a video group appears on the video screen. For example, if the video screen displays six cells, and the seventh order in the queue contains items configured with a video group, then the system beeps once you bump a previous order and the seventh order appears on the video screen.

Cannot bump until check is closed — Allows you to bump orders from the video screen only for closed checks. Items routed to separate video screens are also bumped and removed from the screen. **Related Requirement:** The function applies only if you use the 'Bump Order' button function in Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels.

Wraparound modifiers — Determines how modifiers appear and wrap on the video screen.

One line per modifier — Shows one line per modifier under the item being modified in video cells. This is the default selection for normal operations.

Table 12		1:52:00
Burger		
	LT	
	TOM	
	ON	
	MST	
	AM CHZ	

Contiguous, on same line as item — Displays modifiers as one single line along with the item being modified. The modifiers wrap on to the next line with an indentation on the order cell and do not wrap on the summary cell. **Related Options:** To print modifier items on a separate line, access Maintenance > Menu > Items > Modifier tab and select 'Print independently' under the 'If used as modifier' group bar. .

Table 12		1:52:00
Burger LT TOM ON MST		
	AM CHZ	

Contiguous, on next line following item — Prints modifiers as one single line under the item being modified. The modifiers wrap on to the next line with an indentation on the order cell and do not wrap on the summary cell. **Related Options: 1)** This option enables the 'Wrap modifier tabstops' option. **2)** To print modifier items on a separate line, access Maintenance > Menu > Items > Modifier tab and select 'Print independently' under the 'If used as modifier' group bar.

Table 12		1:52:00
Burger		
	LT TOM ON MST	
	AM CHZ	

Wrap modifier tabstops — Specifies the number of characters used to separate each modifier.
Required Options: You must select 'Contiguous, on next line following item' to enable this option.

Method for Cook Time to appear on video — Determines the method to use when to show the cook time on the video screen. **Documented Version:** v12.3.

All Items to appear with countdown — Enables all items in the order to appear in each appropriate video station, showing the countdown timer for the longest cook-time item in the order. When the timer starts counting down, this alerts the kitchen they have 'X' minutes, and counting, before the longest cook time item will be ready.

Show items on video when countdown begins — Enables items in the order to appear in video station 1 when the item countdown for the longest cook-time item begins. When you bump the item from video station 1, the next item appears in video station 2 and alerts the kitchen they have 'X' minutes, and counting, before the longest cook time item will be ready. You control when items appear on video station 2. Items do not appear on video station 2, with the countdown timer, until you bump the longest cook-time item, regardless of when, during the cooking process, you bump the item from video station 1.

Show items on video when countdown expires — Enables all items in the order to appear in each subsequent video station when the item countdown for the longest cook-time item expires. This alerts the kitchen they must make any accompanying items immediately. This option will not allow the subsequent items to appear on video station 2 until the timer for the item with the longest cook-time expires, regardless of when, during the cooking process, you bump the item from video station 1.

Group bar: Display

Display volume level on video — Enables the current volume level to appear on the status bar at the bottom of the video monitor screen. Volume levels are set through Maintenance > System Settings > Volume Level in Aloha Quick Service only. The volume level number represents the level of sales volume so the kitchen will know when they need to prepare more food.

Consolidate identical items on video — Combines similar items together and displays the appropriate quantity needed. If cleared, similar items display individually. You can consolidate items appearing on the video screen that have identical modifiers. The system can automatically combine these items, and then show a count to the left of the item. This is optional and configurable.



Note

If you modify a similar item, the item appears separately from the other items.

Sort items by priority — Shows menu items or tracking items sorted according to their priority.

Related Options: To assign a priority to an item, access Maintenance > Menu > Items > Item tab and specify a 'Priority' under the 'Auto menu' group bar.

Display cleared items on video — Shows items employees clear from the order.

Indicate changed items on video — Causes changed items on the video screen to appear using the text attributes, color options, and a specified indicator. A changed item occurs when you modify or delete an item after you initially enter it. **Required Options:** You must select 'Changed Items Text' or 'Changed Items Background' in the 'Item Type' column under the 'Color options' group bar and select a text attribute or color. **Related Options:** If you select 'Consolidate identical items on video,' any like item consolidates on the video into one line item, and if one of these items changes, the line item inherits the changed item appearance.

Modifiers use their own video routing settings — Sends modifier items to the queue designated under the 'Routing Assignment' group bar in Maintenance > Menu > Item Routing, only if the menu item it modifies has the same queue designation. If cleared, modifiers appear in every queue in which the menu item appears.

Voided items indicator — Shows up to three characters of text before the line item. For example, type DEL to appear before each voided item. This option is not available for general text attributes or any of the cell backgrounds.

Changed items indicator — Shows up to three characters of text before the line item. For example, type | to appear before each changed item. This option is not available for general text attributes or any of the cell backgrounds.

Group bar: Color options

The 'Color options' group bar allows you to use a color to indicate different order states and special instructions.

Type — Determines the element for which to define the color options and attributes.

Color — Defines the color to associate to the item type.

Intensify — Shows the selected display item in a brighter or more intense color. For example, the normal 16 bit color display changes to a 255 bit color display. When you use Intensify on a background item type, QSR Video causes the foreground text to blink. IBM does not support Intensity on background item types.

Reverse — Shows the selected display item in reverse color. For example, black text appears as white text. A white background appears as a black background. QSR Video does not support Reverse on background item types. IBM does not support Blink on background item types.

Blink — Causes the selected display item or background to blink while showing on the video screen. QSR Video does not support Blink on background item types.

Item Type	Description
Items text	Any menu item appearing on the video screen.
Modifiers text	Any modifier or modification to an item entered without the use of a modifier code.
Substitute modifiers	Any modifier entered using the Substitute function.
General text	The text on the video screen that is not an item or a modifier.
Voided items text	Any item voided during ordering.
Voided items background	The background appearance of the voided line item.
Changed items text	Any modified line item during ordering.
Changed items background	The background appearance of the modified line item.
New order background	The background appearance of a cell that contains a new order. A new order is an order that was entered into the system but has not been finalized. This gives the kitchen an idea of what they must prepare.
Finalized order background	The background appearance of a cell that contains a finalized order. A finalized order is an order that was 'sent to the kitchen' for preparation.
Aged order background	The background appearance of a cell that contains an aged order. An aged order is one that stayed on the screen longer than the number defined in the 'Seconds to Aged Order' text box.

Item Type (Continued)	Description
Old order background	The background appearance of a cell that contains an old order. An old order is one that stayed on the screen longer than the number defined in the 'Seconds to Old Order' text box.
Bumped order background	The background appearance of a cell that contains a bumped order. A bumped order is one that was moved off the screen using a bump bar or keyboard.
Summary order background	The background appearance of a cell(s) that contains the summary information.
Preview order background	The background appearance of a cell(s) containing unassigned or unbalanced orders.
Tracking item text	Any item defined as a tracking item using the Aloha Quick Count add-on.
Check total text	The text on the video screen that shows the check total.
Check total background	The background appearance of the line item containing the check total.

Hotel Group

A Property Management System (PMS) is a software application that enables hotels to automate such things as their guest reservations, guest check-ins and check-outs, room assignments, room rates, posting of charges, and more. NCR provides an interface that allows the Aloha POS to integrate with the hotel PMS in use, enabling the two systems to share data and improve efficiency. Guests can make purchases in the hotel restaurant, bar, or through room service and seamlessly charge them to their room. Use the Hotel group to enable the PMS interface functions and designate the property management system with which to integrate. This group appears only if you are licensed to use the PMS interface (Hotel + MX) and you select 'Display property management' under the 'Options to display' group bar in Maintenance > Business > Additional Features (Aloha Manager) or Corporate Administration (CFC).



Reference

Refer to the Aloha PMS Integration Guide for more information on configuring and using a property management system.

Group bar: Hotel settings

Enable Hotel PMS functions — Activates the PMS interface and enables the remaining options in this group. **Required Options: 1)** To expose this option, access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display property management' under the Options to display' group bar. **Related Options:** This option exposes the rest of the PMS options.

Select a property management system interface — Designates the property management system to integrate with the Aloha POS system. Aloha currently supports the following property management systems. **Required Options:** You must select 'Enable Hotel PMS functions' to expose this option.

- Generic Micros 4700
- Encore
- RDP
- Springer Miller
- HIS
- CSS
- Fidelio
- Fastech
- Marriott
- HIS Preauth
- Aloha hotel manager
- Micros FIAS

Number of Sales Categories — Specifies the number of PMS sales categories to use for sales reporting. **Required Options:** You must select 'Enable Hotel PMS functions' to expose this option.

Discounts and taxes split by category — Separates the total discounts and taxes in the request file sent to the hotel PMS (property management system) interface, by PMS category. Clearing this option submits discounts and taxes as a consolidated total amount. **Required Options:** You must select 'Enable Hotel PMS functions' to expose this option.

Response timeout in seconds — Designates the number of seconds to wait for a response from the PMS system. Enter the desired time limit in seconds, with 30 seconds as the default. **Required Options:** You must select 'Enable Hotel PMS functions' to expose this option.

Number of voucher copies — Designates the number of vouchers to print. This option controls the number of vouchers to print when you adjust or authorize a PMS payment, but not when you delete a PMS payment. **Required Options:** You must select 'Enable Hotel PMS functions' to expose this option.

Report sales for the revenue center from where the check was opened — Indicates sales reporting for the check appears under the revenue center from which the sale originated. For example, if a check originates in the bar and later transfers to the dining room, the sales for the check report under the bar revenue center. **Required Options:** You must select 'Enable Hotel PMS functions' to expose this option.

Number of minutes before 'REQ' file is renamed — Specifies the number of seconds to wait for a response from the PMS when renaming an .req file to an .ans file, for a faster offline response. When the Req timeout value lapses, the PMS timeout begins. Typically you set this Req timeout value lower than the PMS timeout value. **Required Options:** You must select 'Enable Hotel PMS functions' to expose this option.

Allow closed check adjustment — Allows an employee with the appropriate security to adjust the tender applied to a closed check. **Required Options:** You must select 'Enable Hotel PMS functions' to expose this option.

Percent to use when preauthorizing a charge — Specifies the percentage to add to a preauthorization request to account for the guest leaving a tip.

Offline Printer — Specifies the printer to which receipts print when the POS cannot connect to the PMS system. **Required Options:** You must select 'Enable Hotel PMS functions' to expose this option. **Related Requirements:** You define printers in Maintenance > Hardware > Printers.

Token Distribution Group

Use the Token Distribution group to define requirements for token dispensers. The Token Interface enables you to automatically dispense tokens based on the sales amount the guest purchases. You can easily interface the Token dispensing hardware and Aloha security key access, through the touch screen terminal to distribute the correct number of tokens, eliminating the need to manually calculate the number of tokens because the Aloha system does it for you.

You can also define what appears on FOH messages, which helps you in troubleshooting and provides guidance when the TODD token hardware stalls or does not operate correctly. Additionally, you can define the number of seconds to wait before the messages appear.

The system calculates the number of tokens to dispense on a variety of levels, starting with a global setting that affects all items across the board. You can alter the calculation at the item level and the promotion level to override the number of tokens to dispense.

Use the options in the Token Distribution group to define:

- The use of token dispensers and the sales amount guests must spend to receive a token.
- Messages that appear when the machine is dispensing, empty, jammed, or paused.
- Values for when the machine times out.

Group bar: Distribution

Enable token distribution — Activates the Token Distribution feature. **Related Options:** Selecting this option enables all other options in this group.

Amount a customer must spend to receive one token — Specifies the dollar amount the guest must spend to receive a token. The formula is based on the subtotal of items, and rounds down to the next whole dollar. **Required Option:** You must select 'Enable token distribution' to enable this option.

Group bar: Dispensing status messages for POS

You must select 'Enable token distribution' to enable this group bar and its options.

Dispensing — Shows the message prompt that appears while the dispenser is dispensing tokens, such as 'Token dispensing.' Type a maximum of 80 characters.

Empty — Shows the message prompt that appears when the dispenser is empty, such as 'Please check token dispenser. It may empty.' Type a maximum of 80 characters.

Jammed — Shows the message prompt that appears when the dispenser is jammed, such as 'Please check token dispenser for possible jam.' Type a maximum of 80 characters.

Pause — Shows the message prompt that appears when the dispenser pauses, such as 'Please remove all tokens from coin holder.' Type a maximum of 80 characters.

Next guest — Shows the message prompt that appears when the dispenser is ready for the next guest, such as 'Please place cup for next guest.' Type a maximum of 80 characters.

Group bar: Set Dispensing device controller

You must select 'Enable token distribution' to enable this group bar and its options.

Number of seconds allowed before signaling out of tokens — Specifies the maximum number of seconds to wait before signaling that the dispenser is out of tokens.

Number of seconds allowed before signaling jam — Specifies the maximum number of seconds before signaling that the dispenser is jammed.

Number of tokens dispensed before stopping and displaying pause message — Specifies the number of tokens to dispense before showing the 'pause message.' This allows you to remove one cup and put in a different cup.

Aloha Manager tab (Aloha Configuration Center tab)

Use the options on the Aloha Manager tab to configure general settings that apply to the Aloha Manager interface with the Aloha POS system.

Group bar: General settings

Number of seconds between in store processor calls (requires reboot of File Server) — Indicates the number of seconds to wait between calls to the InStoreProcessor. One of the main tasks of the InStoreProcessor is to determine whether an automatic export of the system DBF data needs to run; therefore, this value should be relatively low (i.e., 300, which equals 5 minutes, or 600, which equals 10 minutes), to ensure the export will run automatically before the End-of-Day process runs.

Related Requirements: You must reboot the system when you modify this option.

Number of minutes to allow InStoreProcessor inactivity — Indicates the number of minutes to wait with no response from the InStoreProcessor before timing out.

Number of days to retain log information — Indicates the number of days you want the system to retain specific log files, which contain important activity information about events that occurred during installation, as well as other processes running at the store. Valid entries range from 1 to 999; however, the default is seven days.

Log level — Specifies the level of detail to include in each applicable Aloha Manager or Aloha Configuration Center log file. This information is very useful for troubleshooting purposes.

Info — Stores general event and process activity information, such as information about the executable file being launched, and version information. When you select this option, you receive Info, Warnings, Errors, and Fatal messages in the log files.

Warnings — Stores warning messages that appeared during installation or other process activity, such as an error that occurred during a download. When you select this option, you receive Warnings, Errors, and Fatal messages in the log files.

Errors — Stores error messages that appeared during installation or other process activity, such as if an error occurred during an attempt to apply a download update to the system. When you receive this option, you receive Errors and Fatal messages in the log files.

Fatal — Stores fatal error messages that appeared during installation or other process activity, such as if a failure occurs while processing data distribution transactions. When you select this option, you receive Fatal messages only in the log files.

Debug — Stores debug information that appeared during installation or other process activity. When you select this option, you receive Debug, Info, Warnings, Errors, and Fatal messages in the log files.

Number of database backups to retain — Specifies the number of backups to retain on the server. This function provides you the ability to restore your system to a specific backup, if necessary.

Location for database backup files — Specifies the location where the system stores retained database backup files.

Group bar: Fileserver service parameters

The options under this group bar support communication for remote workstation and the store file server.

Host name — Identifies the file server for the Aloha POS system. The default is 'localhost.'

Group bar: Only use when multiple instances of the POS are installed on the fileserver

Multiple instances of POS are installed — Indicates you installed multiple instances of the Aloha POS system on the file server.

Group bar: Export settings

Exclude employee data from CFC exports — Allows you to maintain the content of the in-store employee file used by the POS using NCR Back Office. Starting with Aloha Configuration Center v14.1, when selected, CFC maintains the structure of the in-store employee file. This ensures any new columns required for new POS versions are automatically added to the file while allowing NBO to continue maintaining the employees within the file.

Aloha digital menu board export folder — Identifies the location of any export files for the Aloha digital menu board settings and configuration (.xml file).

Surcharge

Select **Maintenance > Taxes > Surcharge** to access this function.

A surcharge is an additional charge applied to a check when specific items are sold. It is different from regular charges because a surcharge can be based on the quantity of the item sold, and not necessarily on the price of the item. You use it in instances such as in Florida where each alcoholic drink you sell has its own surcharge assessed.

Restaurants in some jurisdictions require a method to recapture a surcharge on certain menu items. In many cases, a surcharge is an additional flat-rate tax levied on alcoholic beverages on a volume basis. For example, a state might have a surcharge of \$13.50 per gallon on liquor. The Aloha POS system allows restaurant owners to recapture such taxes through the Surcharge feature. You have the option to explicitly charge the cost to the guest, or reduce it as a cost of business. If you opt to collect the money from the guest, the charge shows up as a line item on the guest check. If you opt out of collecting money from the guest, the charge shows up as an expense and thus deducted from the Net Sales calculation. When the Aloha POS system assesses a surcharge on an item, the amount accumulates as a collected surcharge or a not-collected surcharge.

You can also apply an exclusive tax to a surcharge. In this situation, the tax is applied to the surcharge only, not to the item to which the surcharge is applied. The exclusive tax applied to the surcharge appears on the tax line of the guest check.

Surcharges affect the following reports: Restaurant Sales, Server Sales, Flash, and Daily Summary.



Note

You cannot apply an inclusive tax to a surcharge.



Tip

To activate surcharges, access **Maintenance > Business > Store > Store Settings tab > Financials** group and select 'Enable Surcharges' under the 'Surcharge' group bar.

Surcharge tab

Use the Surcharge tab to create and configure the basic options for surcharges.

Group bar: Settings

Name — Specifies the descriptive name for the surcharge. Type a maximum of 12 characters.

Description — Describes the purpose for the surcharge. Type a maximum of 50 characters.

Method — Indicates the calculation method to use to determine the surcharge amount applied to an item.

Amount — Calculates the surcharge as a flat amount.

Percent — Calculates the surcharge as a percentage of the item price.

Amount — Indicates the flat rate, in dollars and cents, to apply to the price of items that require a surcharge. For example, in the case of a surcharge of \$13.50 per gallon of liquor, you can base the amount on the apportioned amount of liquor served in a single drink. One ounce of liquor requires a surcharge of \$0.1055 to recapture the surcharge amount. You can then assign this surcharge to all appropriate liquor menu items that require a surcharge. **Required Options:** You must select Amount as the 'Method' for calculating surcharges to enable this option.

Percentage — Indicates the percentage of the item amount to use when calculating the surcharge. **Required Options:** You must select Percentage as the 'Method' for calculating surcharges to enable this option.

Tax surcharge — Specifies the existing tax record to apply to the surcharge, when applicable.

Survey

Select **Maintenance > Messaging > Survey** to access this function. You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display survey' under the 'Options to display' group bar to expose the Survey function.

The Survey function enables you to request feedback from guests in a random manner. The survey prints on the guest check, after which the guest can access a customer survey or website to obtain a reward, discount, or create a loyalty account. The Aloha POS system offers three code print types from which you can choose to define how a guest accesses the survey, 'Text,' 'Barcode,' and 'QR code.' The guest can call the telephone number provided on the check and enter the specific number of digits to obtain the customer survey or poll; otherwise, the guest scans the bar code or QR code using a smart phone or tablet to access your website for more information.

Survey tab

Use the Settings tab to define basic information about the customer survey.

Name — Identifies the specific survey.

Active — Indicates the survey is active.

Start date — Specifies the date the survey is to begin printing on the guest check.

End date — Specifies the date the survey is to stop printing on the guest check.

Code output — Determines the number of digits to include in the survey code.

No Code — Suppresses the printing of a code number with the survey.

10 digits — Prints a unique 10-digit code on the guest check. This code contains the unit number, current hour the check is closed, current date, and the current month.

15 digits — Prints a unique 15-digit code on the guest check. This code contains the guest check number, current hour the check is closed, current date, and the current month.

16 digits — Prints a unique 16-digit code on the guest check for utilizing five-digit unit numbers. This code contains the guest check number, current hour the check is closed, current date, and the current month.

20 digits — Prints a unique 20-digit code on the guest check for utilizing five-digit unit numbers. This code contains the guest check number, current hour the check is closed, current date, and the current month.

Code print type — Designates the method by which guests access customer surveys. The choices are:

Text — Displays the unique code as numeric. The guest calls the phone number you provide and enters this unique code to access the survey.

Barcode — Displays the code as a machine-readable optical label, represented by varying widths and spaces of parallel lines that contains information about your website. Your guest scans the bar code using a smart phone or tablet to access your website or app.

QR code — Displays the code as black squares arranged in a square grid on a white background. Your guest scans the QR code using a smart phone or tablet to access your website or app.

Print Survey separately — Prints the survey separately from the guest check. The survey always prints when the frequency is met, even if you configure the guest check to not print for a transaction. The following table describes how the survey prints for four possible scenarios:

Survey Printing Separately Option	Guest Check Printing	Output
Selected	Configured	The system prints a slip for the guest check, followed by a slip for the survey.
Selected	Not configured	The system prints a slip only for the survey.
Cleared	Configured	The system prints a slip for the guest check with the survey embedded.
Cleared	Not configured	The system prints a slip only for the survey.

URL for survey — Designates the website address to embed within the QR Code that prints on the survey. **Documented Version:** v19.3.

Group bar: Day part/frequency setup

Use the options under the 'Day part/frequency setup' group bar to specify the day part and the frequency in which the survey prints for the corresponding day part.

Configure All DayParts — Allows you to set the same printing frequency for all day parts. Clear this option to set the frequency for each individual day part. **Documented Version:** POS v19.6. **Related Options: 1)** This option enables the 'Frequency For All DayParts' option. **2)** Selecting this option hides 'Day part 1' through 'Day part 4.'

Frequency For All DayParts — Determines the frequency with which the survey prints for all day parts. For example, if you enter 5, the survey prints on every fifth guest check for all day parts. **Documented Version:** POS v19.6. **Required Options:** You must select 'Configure All DayParts' to enable this option.

Day part 1 through Day part 4 — Determines the day parts (up to four) for which the survey prints.

Frequency 1 through Frequency 4 — Determines the frequency with which the survey prints for the corresponding day part. For example, the 'Frequency 1' option corresponds to the 'Day part 1' option. If you enter 5 for the 'Frequency 1' option, the survey prints on every fifth guest check during the day part selected for 'Day part 1.'

Banner tab

Banner text 1 through Banner text 10 — Designates the banner text to print on the guest check to introduce the customer survey. Enter the text beginning in 'Banner text 1' and continue in sequence (i.e., Banner text 2, Banner text 3...) until you finish the banner. **Related Options:** Add instructional text explaining how to complete the survey using the 'Message text' options.

Message tab

Message text 1 through Message text 10 — Indicates the instructional text to print on the guest check that explains how to complete the survey. Enter the message text beginning in 'Message text 1' and continue in sequence (i.e., Message text 2, Message text 3...) until you finish the message. **Related Options:** Add text introducing the survey using the 'Banner text' options.

Tags

Select **Maintenance > System Settings > Tags** to access this function. The Tags function enables you to create a tag group, to which you can assign buttons with similar properties. Certain buttons may not need to be active at the store at all times. For example, if you sell specialty beverages, such as a pumpkin spice latte, over the winter season, you probably want the button to appear on the order entry screen during the winter season only. If you have other winter beverages in addition to the pumpkin spice latte, you can create a Tag group called Winter Beverages. Later, as you add a winter beverage button to a panel, you can associate the button to the Winter Beverages tag through the Properties window in Screen Designer.

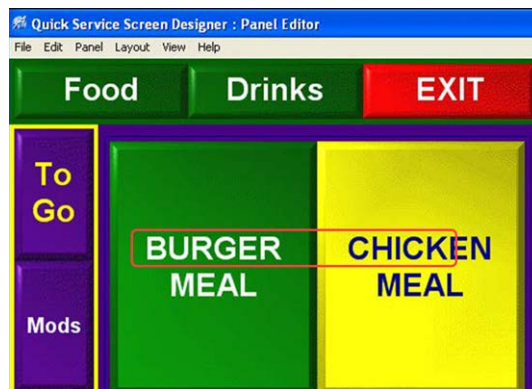


Figure 4 - 15 Example of a Beverage Button Associated to a Tag

If you have many buttons you must activate and deactivate, the task to set an Activate Panel Button event for each individual button using the Events function can be tedious. Using tags, when you set an event to activate or deactivate the winter beverage buttons, you need only set one event for the Winter Beverages tag, and each beverage button associated with that tag activates or deactivates appropriately. Because you must associate a button with a tag before you can activate and deactivate it as part of a tag group, it is best practice to associate a button to a tag when you add the button to a panel; however, the Tags feature is not just for new buttons; you can associate an existing button to a tag at any time.

Tag tab

Use the Tag tab to create groupings to use in certain areas of the system, such as with Screen Designer and Events, when you add buttons to panels.

Number — Indicates the unique number that identifies the record. The combination of Number and Name creates a unique ID for each record in the system. Valid entries range from 1 to 9999.

Name — Identifies the tag group.

Tares

Select **Maintenance > Hardware > Tares** to access this function.

Tares allow you to deduct the weight of the wrapping or container from the gross weight of the goods they contain. When you define a tare, you simply specify the weight of the container for the item. The system then excludes the weight of the container from the total weight of the item before calculating the item price. For example, an item for candy in a glass bowl requires a weighted tare, but an item for sliced meat on butcher paper does not. You associate a tare record to an item in **Maintenance > Menu > Items > Pricing** tab for any item to which you assign the Quantity Price pricing method, if necessary.

Tare tab

Use the Tare tab to create tares for common item wrappings and containers.

Group bar: Settings

Name — Identifies the tare record. We suggest the tare name be descriptive or reflect the type of container or wrapping, such as '1-qt, plastic lidded bowl' or '2-kilo, corrugated waxed box.'

Tare weight — Indicates the weight of the container or wrapping to exclude from the weight calculation of the item. Type the weight using decimals. For example, type .25 to indicate 1/4 of the measurement, whether it is pounds, ounces, or kilos.

Tax Group

Select **Maintenance > Taxes > Tax Group** to access this function.

The Tax Group function enables you to assign one or more tax types to a single tax group, then assign the tax group to each applicable item in the database. Instead of assigning the same set of taxes to each item; you set up the tax group once, then apply it to each item, as needed. For example, if you create a 'food tax' for your database, you would also create a tax group in the Tax Group function, and assign the 'food tax' to that group. Later, when you want to assign a 'food tax' to an item in the system database, you assign the appropriate tax group to the item because that is the group to which the desired food tax belongs.

Tax Group tab

Use the Tax Group tab to define the basic information for a tax group, and assign one or more tax records to the tax group.

Group bar: Identification

Name — Identifies the tax group. Type a maximum of 50 characters.

Group bar: Taxes

Primary tax — Identifies the specific primary tax to add to the tax group. See "Understanding Tax Types" for more information about this tax. **Related Options:** Selecting a primary tax disables the 'Primary flex tax' option. Once you make a primary tax selection, you must select None from the 'Primary tax' drop-down list to re-enable 'Primary flex tax.'

Primary flex tax — Identifies the specific primary flex tax to add to the tax group. **Related Options:** Selecting a 'Primary flex tax' disables the 'Primary tax' option. Once you make a primary flex tax selection, you must select None from the 'Primary flex tax' drop-down list to re-enable 'Primary tax.'

Secondary tax — Indicates the specific secondary tax to add to the tax group. See "Understanding Tax Types" for more information about this tax. **Related Options:** Selecting a secondary tax disables the 'Secondary flex tax' option. Once you make a secondary tax selection, you must select None from the 'Secondary tax' drop-down list to re-enable 'Secondary flex tax.'

Secondary flex tax — Indicates the specific secondary flex tax to add to the tax group. **Related Options:** Selecting a secondary flex tax disables the 'Secondary tax' option. Once you make a secondary flex tax selection, you must select None from the 'Secondary flex tax' drop-down list to re-enable 'Secondary tax.'

Vendor tax — Indicates the specific vendor tax to add to the tax group. See "Understanding Tax Types" for more information about this tax.

Surcharge — Indicates the specific surcharge tax to add to the tax group.

Occupational tax — Indicates the specific occupational tax to add to the tax group. An occupational tax is a privilege or license tax applied to designated types of business, such as hotels, restaurants, and bars. The tax is levied prior to calculating surcharges, primary, and/or secondary taxes. The system then calculates any state and local taxes using the new subtotal. For example, the city of Omaha, Nebraska imposes an occupational tax of 2.5% of the total gross sales for food and beverages as an occupational tax. **Documented Version:** v14.1.

Tax Locale

Select **Maintenance > Taxes > Tax Locale** to access this function.

In the Aloha POS system, taxes typically calculate based on the location of the store; however, some states and local tax jurisdictions require that the tax rate of the delivery destination be applied, for orders that you deliver. This requirement impacts any location that offers delivery, such as Pizza delivery restaurants, and those that provide catering and other order delivery formats.



Note

Tax locales work in conjunction with the Aloha Takeout 'Tax by Destination' function. Using the tax locales you define here, you can associate the appropriate tax to a delivery destination. Refer to your local tax jurisdiction guidelines and regulations for details.

Tax Locale tab

Use the options on this tab to identify the various tax locales that apply to your establishment.

Group bar: Identification

Name — Identifies the tax locale. Allows you to enter up to 20 alphanumeric characters. We recommend using the ZIP code for the name of the tax locale. For example, '76155.'

Description — Provides two lines of free-form text, up to 50 characters, for additional information regarding the tax locale, such as precise street boundaries. For example, 'Fort Worth South of DFW Airport and Hwy 183.'

Tax Type

Select **Maintenance > Taxes > Tax Type** to access this function.

The Aloha system can meet the needs of virtually any taxing jurisdiction. You calculate taxes using a flat rate, or you can set up and utilize tax breakpoints using a tax table. You can also define taxes for use with items that require conditional taxation when purchased under different circumstances. For example, it is possible to not charge tax on a soft drink when it is ordered individually, but charge tax when the soft drink is ordered with food. You can also identify a tax as a Goods and Services Tax (GST), which taxes every item on a guest check unless you identify the item as exempt. You can define up to 999 taxes.



Caution

The information contained here regarding taxes is intended solely as a guide for use with Aloha software. Consult specific state and federal regulations regarding collecting and reporting taxes for your establishment.

Tax types

When you create a new tax type in the database, you must select the type of tax you want to add. Select from the following types, when you click the New drop-down-arrow to add a new tax type:

Primary Tax represents the principle tax used to calculate taxes for items sold at a restaurant. You must assign every item in the database a primary tax. Even if the item is not taxed, you must still apply a tax rate of zero percent (0.00%). Depending on your tax jurisdiction, you can use a flat percentage rate or a tax table, to calculate the primary tax.

Secondary Tax represents a jurisdictional tax that works in conjunction with the primary tax. Some establishments must apply two taxes to a sale, such as a state and a city tax. In this situation, you assign both a primary and secondary tax to each applicable item in the database. Depending on your tax jurisdiction, you can use a flat percentage rate or a tax table, to calculate the secondary tax.

Vendor represents a tax that some product suppliers assess to items purchased by the restaurant. Your establishments can pass along the vendor tax to customers. To recoup the vendor tax, you must add a vendor tax to each applicable item in the database. You can use the vendor tax as a primary tax, or as an additional tax placed on an item.

GST represents a multi-level value-added tax (VAT) used in international environments. This tax charges a certain percentage of the sale amount of all goods and services; however, you can exempt certain items from the GST tax, as allowed. You apply the GST tax at the item level rather than the guest check level, and after other taxes are applied to the guest check. For example, if the guest check subtotal for a sandwich is \$5 and the primary tax applied is 5%, the new subtotal is \$5.25. If a GST tax of 3% is in effect, the system calculates the tax against the new subtotal (\$5.25), which brings the guest check total to \$5.40.

Occupational Tax represents a privilege or license tax on certain types of businesses, such as hotels, car rental companies, restaurants, and bars. You must calculate the occupational tax on the

check total before applying other taxes, and then use this subtotal to calculate state and local sales tax. You cannot combine the occupational tax with any other tax for a flat rate. Additionally, if you configure an item for inclusive taxes, you calculate the overall sales tax amount based on the item price plus the occupational tax.

Tax quick tips:

There are several rules to follow when you add and maintain taxes in the system:

- You never assign a tax type record directly to an item. You assign tax types to specific tax groups, and *then* assign an applicable tax group to an item.
- You can create five different tax types in the Aloha POS system: Primary Tax, Secondary Tax, Vendor, GST, and Occupational Tax.
- You must associate every item in your POS database to a Primary Tax tax type; therefore, every tax group you define must include a Primary Tax type, even if you set the primary tax rate to zero percent (0.00%).
- Tax methods can be exclusive or inclusive, which use different formulas to calculate tax.
- Secondary taxes use the Exclusive tax method.
- Tax jurisdictions that follow tax table guidelines, such as those in Florida, use breakpoints to calculate tax.
- A flex tax rule is not a type of tax; it is a guideline that works with existing primary and secondary taxes, based on conditional taxation rules.
- You cannot apply an inclusive tax to a surcharge.

Tax Type tab

Use the Tax Type tab to establish the name of the tax, the tax rate, and the tax method. You also set the minimum amount to apply to a check before applying a tax.

Group bar: Settings

Name — Identifies the tax record. Type a maximum of 15 characters.

Description — Provides a more detailed description for the tax record. Type a maximum of 50 characters.

Method — Indicates the method of calculation the system uses to determine the tax amount.

Inclusive Rate — Shows the tax included in the stated price of an item. When a customer orders a drink in the bar area of a restaurant, sales tax is often included in the price of the drink, as a convenience to both the restaurant and the customer. **Related Options:** This method appears only when you select Primary or GST as the tax type.

Exclusive Rate — Calculates a tax as an amount added to the price of an item. When prepared food and drinks are sold in restaurants, the sales tax is normally stated separately and added to the total bill. **Related Options:** This method appears only when you select Primary, Secondary, GST, or Occupational Tax as the tax type.

Exclusive Tax Table — Uses a tax table to calculate sales tax. When you select this method, the Non-Repeating Table and Repeating Table tabs appear, into which you must enter the appropriate data obtained from your taxing jurisdiction. **Related Options:** This method appears only when you select Primary, Secondary, GST, or Occupational Tax as the tax type.

Vendor Inclusive — Shows the vendor assessed tax included in the stated price of an item. When a vendor assesses a separate charge, you pass along that assessment to the customer. **Required Options:** This method appears as the only choice when you select Vendor as the tax type.

Percentage — Indicates the default tax percent to apply to each item. **Related Options:** This option is not available when you select Exclusive Tax Table from the 'Method' drop-down list.

Minimum taxable amount — Designates the minimum sale amount required before the system applies a tax. This is used in tax jurisdictions, such as the Canadian Province. **Related Options:** You must select Primary Tax or Secondary Tax as the tax type to enable this option.

Maximum tax amount — Designates the maximum allowable tax amount assessed for the selected tax type. Some state and city laws impose a limit on the amount of tax that can be applied to a check. For example, the city tax of Wasilla in Alaska states that the 'first \$500.00 of any one sale or transaction must be taxed at the current 2% rate; however, a customer cannot be charged more than \$10.00 in sales tax on any one transaction.'

Property Management System tax ID — Enables you to select one of four specific tax categories, typically for room charge postings. These are labeled 'PMS Tax 1' through 'PMS Tax 4.'

Accounts receivable account — Interfaces with the Aloha Accounts Receivable product. There are eight tax rate text boxes located on the General tab in Accounts Receivable. These are labeled 'POS Tax Rate 1' through 'POS Tax Rate 8.' Select the 'POS Tax Rate' text box that corresponds with this tax record. **Related Options:** This option is not available when you select GST as the tax type.

Exclude from tax exempt — Prevents this tax type from being included when tax exempt and taxable items appear on the same guest check. **Documented Version:** v14.1

Non-Repeating Table tab

The Non-Repeating Table and Repeating Table tabs appear only if you select Exclusive Tax Table as the 'Method' for calculating the tax. The system uses the information you configure on these tabs when a taxing jurisdiction, such as the state of Florida, requires you to follow a tax table to calculate taxes instead of using a flat percentage rate. A tax table establishes breakpoints to indicate at which sales amount the guest pays a higher tax amount. As you configure a tax table, the first few breakpoints do not fall into a pattern and are known as non-repeating breakpoints; however, as you continue entering breakpoints into the tax table, there is a point at which the tax table begins repeating itself, known as the 'period of tax repetition.' You type each of the non-repeating breakpoints in the Non-Repeating Table tab. As soon as the repeating cycle begins to occur, you select the Repeating Table tab and continue typing the breakpoints from your tax table. You need only type as many breakpoints as needed before the pattern repeats again.

Use the Non-Repeating Breakpoints tab to establish the initial tax values and breakpoints to apply to a specific range of sale amounts, before the tax breakpoints start to repeat.

Group bar: Non-Repeating Breakpoints

A breakpoint is the value you must add to the total sale before being taxed at the next higher tax amount. You determine the amount for each breakpoint by subtracting the lower 'Tax Amount' value on the tax table from the next higher 'Tax Amount' value.

The first breakpoint you type is equivalent to the lowest amount a guest must purchase before accruing any tax. For example, the guest check must total at least 10 cents (\$0.10) before the system calculates any tax on the purchase. You determine the value for each breakpoint that follows by subtracting the next higher 'Tax Amount' value on the tax table from the 'Tax Amount' value just above it. Continue with this calculation until you reach a point where the pattern repeats. **Required Options:** You must select Exclusive Tax Table as the tax method for this tab to appear.

Breakpoint — Indicates the currency amount that will be taxed.

Tax Amount — Displays the calculated tax amount. The system multiplies the row number by 0.01 to calculate the tax amount for the current row. Note: The first row is considered zero (0.00).

From — Displays the calculated 'From' breakpoint range amount. The first row has a value of 0.00. The system takes the 'To' value from the previous row and adds 0.01, to calculate the 'From' value of each subsequent row.

To — Displays the calculated 'To' breakpoint range amount. The system takes the Breakpoint value from the current row and subtracts 0.01. The system then adds the new total to the 'From' value on the current row, to calculate the 'To' value.

The following table provides a sample of a non-repeating tax table:

Breakpoint	Tax Amount	From	To
0.05	0.00	0.00	0.04
0.03	0.01	0.05	0.07
0.01	0.02	0.08	0.09
0.04	0.03	0.10	0.13

Repeating Table tab

Use the Repeating Table tab when a certain taxing jurisdiction requires you to follow a tax table chart instead of a flat percentage. When you configure a tax table, you establish break points to indicate at which point a sale amount warrants a higher tax value. As you define your breakpoints, a repeating cycle starts to occur.

Use the Non-Repeating Table tab to enter the breakpoints that occur prior to falling into a pattern; use this tab to establish the tax values and breakpoints to apply to a specific range of sale amounts, after the tax breakpoints start to repeat. **Required Options:** You must select Exclusive Tax Table as the tax method for this tab to appear.

Group bar: Repeating Breakpoints

Breakpoint — Indicates the currency amount that will be taxed.

Tax Amount — Displays the calculated tax amount. The system takes the 'Tax Amount' value from the previous row and adds 0.01, to calculate the tax amount for the current row.

Initial From — Displays the calculated 'Initial From' breakpoint range amount. The system takes the last 'To' value that appears on the Non-repeating tax table and adds 0.01 to calculate the 'Initial From' value for the first row. For each subsequent row, the system takes the 'Initial To' value from the previous row and adds 0.01, to calculate the 'Initial From' value. **Note:** If no values exist on the non-repeating tax table, the value for the first row is 0.00.

Initial To — Displays the calculated 'Initial To' breakpoint range amount. The system takes the Breakpoint value from the current row, subtracts 0.01, and then adds the new total to the 'Initial From' value, to calculate the 'Initial To' value.

Repeat From — Displays the calculated 'Repeat From' breakpoint range amount. The system takes the 'Initial To' value from the last row and adds 0.01, to calculate the first 'Repeat From' value. Each subsequent 'Repeat From' value is calculated by taking the previous rows 'Repeat To' value and adding .01 to it. If there is only one row, the system takes the 'Initial To' value from the current row and adds 0.01, to calculate the 'Repeat From' value.

Repeat To — Displays the calculated 'Repeat To' breakpoint range amount. The system takes the Breakpoint value from the current row, subtracts 0.01, and then adds the new total to the 'Repeat From' value, to calculate the 'Repeat To' value.

The following table provides a sample of a tax table once the pattern begins to repeat:

Breakpoint	Tax Amount	Initial From	Initial To	Repeat From	Repeat To
0.06	0.04	0.14	0.19	0.27	0.32
0.04	0.05	0.20	0.23	0.33	0.36
0.03	0.06	0.24	0.26	0.37	0.39

Tender Groups

Select **Maintenance > Payments > Tender Groups** to access this function.

Use the Tender Groups function to group tenders together, by employee access level, to restrict employees from using a single specific tender or a group of tenders. Define a tender group that an access level can use to tender checks, and associate the tender group to an access level, such as 'Cashiers.' Use this feature mainly to restrict non-cash tenders, but you can exclude certain cash denominations from a tender group. The system does not safeguard against the employee entering multiple cash tenders to achieve a higher denomination. For example, if you want to require approval for \$100.00 bills, the employee can still receive a \$100.00 bill, but enter five \$20.00 bills to equal \$100.00.

Tender Group tab

Use the Tender Group tab to create basic information including the number and name of the tender group.

Group bar: Settings

Name — Identifies the tender group. Type a maximum of 10 characters.

Assignment tab

The Assignment tab enables you to assign tenders to a tender group. Unassigned tenders that currently exist in the database appear in the 'Available' list on the left side of the screen. Tenders currently assigned to the selected tender group appear in the 'Included' list on the right side of the screen. **Related Requirements:** You define tenders in Maintenance > Payments > Tenders.

Use the >> and << arrows to move tenders between the 'Available' list and the 'Included' list.

Tenders

Select **Maintenance > Payments > Tenders** to access this function.

Use the Tenders function to define the payment types you plan to use in the Aloha POS system. Use this function to define the attributes of each tender, as well as parameters to handle cash and credit card payments. Tenders are either cash tenders or non-cash.

After you create tenders, access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels, and place tender buttons on panels for display on the FOH terminal.



Reference

Refer to the [Quick Service Screen Designer Guide](#) for more information on configuring and using panels and screens.

Tender types

There are several tender types from which to choose when deciding which payment types to accept at your restaurant.

Accounts receivable is a non-cash tender you create when you interface the Aloha POS with an Accounts Receivable program. This tender allows you to charge purchases to a special account that the customer can settle later.

Campus card is a non-cash tender you create when you interface with a system that provides meal plans for its members, such as on a college campus.

Cash is a generic cash tender that uses a \$0.00 default value. The \$0.00 default value enables you to manually enter the payment amount on the FOH cash screen. You must configure at least one cash tender with a \$0.00 default amount. You can also configure a cash tender for a specific amount, such as \$20.00, another to round a payment up to the next dollar amount, and another to apply a payment equal to the amount of the guest check. **Required Options:** If you select a Cash tender type, you must also select Cash from the 'Report as' drop-down list.



Caution

The FOH does not run unless you first define a cash tender with a \$0.00 default value.

Cash card is a non-cash tender that allows you to accept payments using a Debittek or Intercard cash card device. You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display cash card' under the 'Options to display' group bar. You define the Debittek or Intercard cash card device in Maintenance > Hardware > Cash Cards.

Check is a cash tender you create for accepting personal checks.

Credit card is a non-cash tender that allows guests with cards issued by a bank or business to purchase goods or services on credit. The card holder receives a bill from the issuing credit card

company. You create a credit card tender for each type of credit card your establishment accepts, such as AMEX, VISA, Discover, and more. You can also create a generic credit card tender; however, if you choose this tender method, any payment reports you run will not break out credit card payments by credit card type. **Related Options:** To mask the full or partial card number from appearing on a voucher, make a selection in 'Card number masking method' located in Maintenance > Business > Store > Store Settings tab in both the Gift Card/Certificate Sales group under the 'Printing properties' group bar and in the Campus Card group.

Debit is a non-cash tender that a card holder can use instead of cash when making a purchase. Similar to, but unlike, a credit card, the money comes directly from the card holder bank account at the time of the purchase.

Electronic Benefit Transfer is a type of non-cash tender issued by state governments to provide financial and material benefits to authorized participants. An EBT card is essentially a pre-loaded debit card funded by the United States government.

Generic is a non-cash tender for use when integrating the Aloha POS system with another application, such as Connected Payments.

Gift card is a non-cash tender with a pre-loaded amount that a card holder can use instead of cash when making a purchase. A gift card can be one for use at a specific retailer only, or one that can be used anywhere that accepts major credit cards. Some gift cards allow the card holder to add funds to the card and continue using it. The Aloha POS currently natively supports the following gift card providers: Aloha Stored Value, Paymentech, Stored Value Systems, ValueLink, and Vantiv. The POS also supports Valutec using a Universal Payment Interface.

Gift certificate is a non-cash tender, usually in paper form, entitling the recipient to receive goods or services of a specified value from the issuer. Gift certificates do not support overpayment scenarios.

House account is a non-cash tender you create when your business lets customers set up personal or business accounts. House accounts enable you to charge meals or other items to a special account, that the customer can settle later. You can also use a house account tender to charge employee meals to a separate account, and settle the account later. **Related Requirements:** You define house accounts in Maintenance > Payments > House Accounts.

Property management is a non-cash tender you create when you interface the Aloha POS system with a hotel's property management system, to allow guests to charge purchases to their room.

Tenders quick tips

To allow for easier setup of Connected Payments, tender ID 900 is automatically added to the Tenders function. This record is active on default and cannot be made inactive. Upon upgrade, if a tender with number 900 exists, it is renumbered to the next available number greater than 900. Effective in CFC/AM v18.11, you can edit options in this tender that were previously forced to specific values to allow for different configuration requirements.

Tender tab

Use the Tender tab to determine the tender type, default amounts, tip allowance, over payments, and much more.

Group bar: Settings

Name — Identifies the specific tender, such as \$5, \$20, AMEX, VISA, Cash, and more. Type a maximum of 10 characters.

Type — Indicates the type of tender you are creating. This option is 'read only.' Click the down arrow next to New to select a tender type. See "Tender types" for more information.



Tip

If you select a Cash tender type, you must also select Cash from the 'Report as' drop-down list.

Button image — Specifies the image to appear on the button on the Tender screen. **Required Options:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the tender button to the panel from which you access tenders on the FOH. **Related Options:** You must upload an image using the Media Files function before you can select it from the image list.

Report as — Indicates the tender type to use for reporting sales paid with this tender. To report a tender type as itself, select 'Default.' You should report cash tenders as 'Cash,' unless you want to track how many times you accept a certain denomination, such as a \$100.00 bill.



Tip

If you elect to report the tender as Cash, you must also select Cash as the tender type.

Default amount behavior — Defines how the system applies payment when you select the defined tender on the FOH terminal, which can speed up the payment process.

Ask for amount — Displays the check total but places the cursor at the end of the payment amount, allowing you to change the amount, if necessary. Use this option for non-cash tenders.

Next highest amount — Rounds up the payment amount to the next highest dollar, based on the check total. For example, if the check total is \$6.62, the system applies a payment of \$7.00 and the change due to the customer appears on the screen. Use this option for the cash tenders.

Exact amount due — Applies a payment amount equal to the check total. Use this option for cash tenders.

Specific amount — Applies a payment amount equal to the specific monetary value you associate with the tender in 'Amount' and the change due to the customer appears on the screen. Use this option for cash tenders. **Related Options:** When you select 'Specific amount,' you must designate a monetary value in 'Amount.'

Amount — Designates the specific monetary value to associate with this tender. **Required Options:** You must select 'Specific amount' as the 'Default amount behavior' to enable this option.

Display change for next highest amount — Shows the amount of coinage due back to the customer in the upper right corner of the button, based on the amount due for the check rounded up to the next dollar amount. Use this option so the cashier can quickly have the change ready to give to a customer. **Required Options:** You must select 'Next highest amount' as the 'Default amount behavior' to enable this option. **Related Requirements:** You must access Maintenance > Screen Designer > Quick Service Screen Designer > Work with Panels and add the appropriate tender button to a panel in use. **Documented Version:** v12.3.

Active — Makes the tender available for use in the FOH.

Track — This option is no longer used by the Aloha POS system.

Can refund — Allows you to issue a refund and return money back to the original form of non-cash payment. You must select this option for non-cash tenders that allow refunds. For example, to issue refunds for a gift card tender, you must select this option; otherwise, you cannot issue a refund and return the money back to the gift card. **Related Options:** You can issue credit card refunds even if you clear 'Can refund,' if you also clear 'Authorize using EDC' under the 'Authorization' group bar on the Authorization tab.

Affect deposit — Indicates the over/short calculation for deposits includes this tender. Select this option for cash and personal check tenders. Clear this option for payment card tenders.

Print check on close — Prints a copy of the guest check at the time you close the check. To save paper, clear this option to turn off printing of the guest check at close for non-cash tenders in environments where you provide a copy of the guest check to the guest prior to applying payment. The guest typically does not require another copy of the guest check after you tender and close the check. If you select this option for the default 'Cash' tender, the system automatically prints the guest check for all other cash tenders, such as the \$5.00, \$10.00, and \$20.00 tenders.

Open drawer on close — Automatically opens the cash drawer when you close a check using this tender. If cleared, the drawer does not open automatically. **Related Options:** To override this option and allow the drawer to open, even for checks with a \$0.00 total, access Maintenance > Business > Store > Settings tab > Security group and select 'Open drawer when check balance is zero' under the 'Cash Drawer' group bar.

Print signature line — Prints a signature line on the guest check. Use this option for non-cash tenders for which you require a signature from the guest, such as 'House account' and 'Property management' tender types. Do not confuse this option as one having to do with signature line rules that control when to print signature lines on credit card vouchers.

Campus card plan — Ties this tender to one of nine specific Campus Card processors. Each processor is capable of handling multiple types of cards and plans. **Required Options:** You must select 'Campus card' as the tender type to expose this option.

Group bar: Overpayment

You must select a non-cash tender to enable this group bar and its options.

Allow overpayment — Permits an employee to enter an amount greater than the guest check total when tendering the check, allowing the customer to receive cash back. You can limit the amount a guest can receive back in cash to either a percentage of the guest check, or a set dollar amount.

Related Options: Selecting this option enables 'Limit by percent,' 'Excess amount,' and 'Manager can always overpay.'

Limit by percent — Designates the amount you enter in 'Excess amount' is a percentage, not a set dollar amount. **Required Options: 1)** You must select 'Allow overpayment' to enable this option.

Excess amount — Specifies the maximum dollar amount or maximum percentage you can offer the guest as cash back. If you select 'Limit by percent,' you must enter a decimal percentage as a number and two decimal places. For example, type fifty percent as 50.00. If you **do not** select 'Limit by percent,' you must specify a set dollar amount, such as \$10.00. **Required Options:** You must select 'Allow overpayment' to enable this option.

Manager can always overpay — Enables a prompt for manager approval when an employee enters a tender amount greater than the guest check amount. **Required Options:** You must select 'Allow overpayment' to enable this option.

Auto fix balance without prompt — Enables the system to automatically correct an overpayment on a check, without a confirmation message, when you apply a tender for which you do not allow an overpayment. This applies for non-cash tenders, excluding gift card and gift certificate tender types. When an overpayment situation occurs after you apply the payment, such as a reduction in the check because of a void, the system adjusts the amount charged to the payment card without requiring you to respond to a confirmation prompt. **Related Options:** Selecting 'Allow overpayment' disables this option.

Provide change — Calculates change for the customer for this tender type and shows the amount due, including dollars and cents.

Group bar: Tips

Allow tips — Allows you to add a tip to a guest check paid with this tender. Typically, you select this option for credit card tender types. If cleared, the system does not prompt you to enter a tip, print a tip line, or allow you to adjust a tip for payments made with this tender. **Related Options: 1)** To override this option for a revenue center, access Maintenance > System Settings > Revenue Center > Revenue Centers tab and select 'Disable tips' under the 'Settings' group bar. **2)** You must select this option to enable 'Maximum tip %.'

Maximum tip % — Specifies the maximum allowable tip percentage of the total sale you can enter as a tip for this tender. Type the percentage as a number and two decimal places. For example, type fifty percent as 50.00. **Required Options:** You must select 'Allow tips' to enable this option. **Related Options:** To allow an employee to override the 'Maximum tip %' restriction for a tender in the FOH, access Maintenance > Labor > Pos Access Levels > Access Level tab, select 'Adjust payments' under the 'Financial' group bar, and assign the access level to the employee.



Tip

The percentage in 'Maximum tip %' is not enforced if you set it higher than 99 percent. If you set it to 99% or lower, there is a limit. If you set it to 100% or higher, there is no limit.

Type tab

Use the options on the Type tab to specify credit card and gift card providers and to configure options for your property management system and foreign currencies.

Group bar: Type settings

The selected tender type must be 'Credit card,' or 'Gift card' for this group bar to appear.

Credit card provider — Indicates the specific credit card provider for this tender. **Required Options:** You must select a tender type of 'Credit card' to enable this option. Use 'Not Applicable,' when configuring a credit card tender not tied to one of the listed card brands.

Prompt for payment using the following PIN pad — Designates the PIN Pad device to use when applying a payment for this tender. **Required Options:** You must select a tender type of 'Credit card' to enable this option.

Apply a surcharge to this tender — Adds a surcharge when you apply this tender to the guest check. Use this option when you want to recoup an extra charge, such as a processing fee, from the guest. **Required Options:** You must select a tender type of 'Credit card' to enable this option.

Related Requirements: You define surcharges in Maintenance > Taxes > Surcharge. **Documented Version:** v12.3.

Chip 'N Pin reader ID required — Prompts you to type the chip and pin reader device ID, when you close the check in the FOH. The employee then takes the device to the guest, who enters their PIN number, amount, and tip, using the chip and pin reader device. **Required Options:** You must select a tender type of 'Credit card' to enable this option.

Allow manual entry — Allows manual entry of the credit card number when the magnetic stripe is unreadable. **Required Options:** You must select a tender type of 'Credit card' or 'Gift card' to enable this option.

Gift card provider — Indicates the specific gift card provider for this tender. **Required Options:** You must select a tender type of 'Gift card' to enable this option.

IVR phone # — Indicates the Integrated Voice Response (IVR) number used to dial for voice authorization when the system cannot connect. Type a maximum of 15 characters. **Required Options: 1)** You must select a tender type of 'Gift card' to enable this option. **2)** You must select Paymentech or Stored Value Systems as the 'Gift card provider' to enable this option.

Electronic Benefits Type — Specifies the type of aid supported by the United States government for this tender. Select from 'Cash Benefits' and 'Food Stamps.' You cannot leave this option as 'Not Applicable.' **Required Options:** You must select a tender type of 'Electronic Benefit Transfer' to enable this option.

Cash Benefits — Indicates this tender is for cash benefits issued by the United States government.

Food Stamps — Indicates this tender is for food benefits issued by the United States government. We recommend you name this tender 'Food Benefit,' to avoid the derogatory connotation of the term food stamps. **Required Options:** You must create a category of items that a guest can purchase using their food benefits payment card and access Maintenance > Business > Store > Store Settings tab > Credit Card group and select it from the 'Food stamp category' drop-down list under the 'EDC Setup' group bar.

EBT Tax exempt — Does not apply taxes to a check paid for using a food benefits payment card. This option is only available and automatically selected for EBT tenders for which you select Food Stamps as the 'Electronic Benefits Type.'

Campus card provider — Designates the vendor that provides the campus cards. Currently, Card-Smith is the only provider we support. **Required Options:** You must select 'Campus card' as the tender type to expose this option.

Allowed items category — Designates the category of items from which a campus card owner must purchase items to use the campus card. **Required Options: 1)** You must select 'Campus card' as the tender type to expose this option. **2)** You define categories in Maintenance > Menu > Categories.

Group bar: Property management settings

This group bar appears for every tender type except Electronic Benefit Transfer.

Post to PMS — Identifies this tender as one that interfaces with the property management system in place at the site. This option does not appear for the 'Property management' tender type.'

PMS tender ID — Designates the tender from the PMS interface to which to associate this tender. Valid entries range from 0 to 999,999,999.



Reference

Refer to the Aloha PMS Integration Guide for more information.

PMS room # — Specifies the text to prompt for the entry of the guest room number on the Close screen when you use this tender to apply a payment. Type a maximum of 10 characters.

Allow offline posting — Allows you to post a payment using this tender when the Aloha POS system cannot connect to the property management system in use. A manager or employee with sufficient access must approve the payment if the Manager Approval screen appears. **Required Options:** Access Maintenance > Labor > Pos Access Levels and select 'Approve offline hotel charges' for a manager or another high level employee.

Group bar: Accounts Receivables

Use the 'Accounts Receivables' group box to define options to use for interfacing with an accounts receivable program. You must select a tender type of 'Accounts receivable' to enable this group bar.

Verify customer data — Prompts you to use the accounts receivable database to verify the customer data for this tender type.

Print reference on receipt — Prints the reference information entered in the FOH when you close the guest check. This is determined by the Reference Entry text box in the Accounts Receivable program. Type '0' to disable the FOH prompt. Type '1' to show a FOH prompt with an optional entry. Type '2' to show a FOH prompt with a required entry.

Print balance on receipt — Prints the customer balance from the accounts receivable program on the receipt.

Accounts receivable field printed on receipt — Enables you to select another field from the customer accounts receivable information to print on the FOH receipt. Valid options are None, Card Number, Phone Number, or Company Name.

Group bar: Foreign Currency

Foreign currency — Specifies the currency to use for the selected tender. For example, Canadian Dollar. **Related Requirements:** You define foreign currencies in Maintenance > Payments > Foreign Currencies.

Group bar: Options settings

This group bar appears for all but the 'Accounts receivable' tender type. Only the options applicable to the tender type you are creating appear for selection. For example, 'Verify signature' appears for selection for the Check tender type, but 'Use magnetic card only' does not.

Use magnetic card only — Prevents all employees from manually entering a payment card number without manager approval when applying this tender as payment. The system prompts for a manager password when they attempt to manually enter the number. This option is selected by default for the 'Debit' tender type and cannot be cleared. **Related Options:** To override this option for a certain employee and allow them to enter the gift card number without manager approval, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Manual card number' under the 'Financial' group bar, and then assign that access level to the employee.

Expiration — Enables order entry terminals to automatically prompt for an expiration date when manually entering a payment card number. **Related Options:** Selecting this option, if available for the tender type, enables 'Verify expiration.'

Verify expiration — Compares the credit card or gift card expiration date to the Aloha POS system date automatically to verify the card has not expired. **Required Options:** 1) You must select 'Expiration,' if available for the tender type, to enable this option. 2) While 'Expiration' is available for the Electronic Benefit Transfer tender type, 'Verify expiration' is not.

Verify signature — Prompts the employee to verify the signature on the voucher against the signature on the card, when you apply a payment with this tender.

Reduce points from Loyalty plans — Allows accrual of Loyalty points only when purchasing a gift card, and not when redeeming the gift card. For example, a guest purchases a gift card for \$20.00. At a later visit, the guest purchases \$50.00 of food, and offers the \$20.00 gift card for payment. The guest accrues Loyalty points for the remaining \$30.00 paid with another payment type, preventing duplication of Loyalty points for purchases that already received the points. **Required Options: 1)** You must select 'Gift card' as the tender type to enable this option. **2) You must** configure Aloha Loyalty to work with this enhancement. Contact your Insight/Aloha Loyalty representative for more details regarding loyalty plans.

Display tender screen on card swipe — Makes the appropriate tender screen appear when you slide or tap a payment card while using the Auto-Detection of Card Type feature. Use this option to provide the opportunity to verify or change the amount applied to the card prior to sending the authorization request. If cleared, the system immediately sends the full amount of the transaction for authorization. **Required Options:** You must access Maintenance > Business > Store > Store Settings tab > User Interface group and select 'Automatically detect card swipe' under the 'Functionality' group bar to use this feature.

Display ID field first on tender screen — Makes the ID appear on the Tender screen with the cursor focus on ID. **Required Options:** You must select Private Label as the 'Gift card provider' for the tender under the 'Type settings' group bar on the Type tab to enable this option. **Documented Version:** v15.1.

Allow cash out — Allows you to apply a gift card as a payment to a guest check and provide the remaining balance of the gift card to the guest as cash. **Required Options:** You must access Maintenance > Business > Store > Store Settings > Gift Card/Certificate tab and select 'Paymentech' in the 'Gift card provider' drop-down list to enable this option.

Identification tab

Use the Identification tab to define the requirements for identifying payment cards while tendering a guest check in the FOH, such as the text to prompt for the card number, whether the entry is numeric only and should or should not print on the check, the minimum and maximum number of digits required, and more. You also use this tab to stipulate whether you want to display the Security Verification tab and enforce even stronger security measures regarding payment cards.

Group bar: Identification

Require identification — Forces the entry of information on the FOH tender screen that meets the requirements of the remaining options that appear on this tab when you select this option. You cannot close the check until you meet the requirements. **Required Options:** You must select a non-cash tender to enable this option. **Related Options:** Selecting this option enables the Security Verification tab, and all the remaining options on this tab.

Prompt — Indicates the text to appear on the FOH tender screen to prompt for information, such as 'Card #.' **Required Options:** You must select 'Require identification' to enable this option.

Minimum — Specifies the minimum number of digits or characters allowed for entry for this prompt. **Required Options:** You must select 'Require identification' to enable this option.

Maximum — Specifies the maximum number of digits or characters allowed for entry for this prompt. **Required Options:** You must select 'Require identification' to enable this option.

Numeric only — Specifies the response to the prompt can contain only numbers. Select this option to show a numeric keypad, or clear it to show an alphanumeric keypad on screen. **Required Options:** You must select 'Require identification' to enable this option.

Print on check — Prints the card number on the guest check. Clear this option for *all* payment card tenders. **Required Options:** You must select 'Require identification' to enable this option.

Validate — Validates the account number entered on the FOH tender screen against the list of IDs you stipulate on the Validation tab. **Required Options: 1)** You must select 'Require identification' to enable this option. **2)** Selecting this option enables the Validation tab, where you stipulate the valid or invalid IDs for this payment card. **3)** You must select either Include or Exclude for 'Valid' to determine what to enter on the Validation tab.

Valid — Indicates whether the user-defined IDs on the Validation tab should be accepted or declined in the FOH. **Required Options:** You must select 'Require identification' to enable this option.

Include — Stipulates the gift card IDs entered on the Validation tab are valid and should be accepted in the FOH.

Exclude — -Stipulates the gift card IDs entered on the Validation tab are not valid and should not be accepted in the FOH.

Prompt twice for manual entry — Requires you to enter the card number twice, when entering the card number manually instead of reading it electronically from a magnetic stripe reader. A prompt to Re-enter Card # appears. Both entries must match before you can proceed. **Required Options: 1)** You must select 'Require identification' to enable this option. **2)** You must select either 'Gift card' or 'Credit card' as the tender type to enable this option.

Check the number of digits for private label credit card — Verifies the number of digits for the private label card is no more or less than the minimum and maximum digits allowed for that card. **Required Options:** You must access Maintenance > Payments > Tenders > Type tab and select Private Label as the 'Credit card provider' under the 'Type settings' group bar to enable this option for a credit card tender type.

Group bar: Prefix checking

Prefix 1 through Prefix 4 — Defines valid prefixes for the payment card type, up to the first eight digits. Use this to validate gift card numbers. The system uses these prefixes in the validation process to identify the issuer of the card. While entering a prefix is optional, doing so provides additional security, especially when processing offline. **Required Options:** You must select 'Require identification' and a non-cash tender to enable this option.

Digits to validate — Designates how many digits at the beginning of a card number to validate. For example, if you type a six-digit prefix as a valid prefix, you can validate up to, but not more than, six digits of the card number. **Required Options:** You must select 'Require identification' to enable this option.

Authorization tab

Use the Authorization tab to force the entry of an authorization code for manual credit card transactions, either a code that is returned by Aloha EDC or one you provide when you manually type the card number.

Group bar: Authorization

Require authorization — Forces the employee to provide an authorization code, either a code returned by Aloha EDC or one you manually type, on the FOH tender screen. **Related Options:** Selecting this option enables 'Authorization prompt,' 'Maximum length,' 'Authorize using EDC,' and 'Allow pre-auth with EDC.'

Authorization prompt — Specifies the text, such as 'Authorization #,' to appear for the authorization code on the FOH tender screen and on the guest check. Type up to 15 characters. **Required Options:** You must select 'Require authorization' to enable this option.

Maximum length — Defines the maximum length of the authorization code. If you type 0 (zero) as the maximum length, the system accepts blank authorization codes. **Required Options:** You must select 'Require authorization' to enable this option.

Print on check — Prints the authorization code on the guest check.

Authorize using EDC — Uses Aloha EDC to electronically return an authorization code. If you clear this option, you must manually enter an authorization code on the FOH tender screen before the system will allow you to continue. **Required Options:** You must select 'Require authorization' to enable this option.

Allow pre-auth with EDC — Uses Aloha EDC to electronically return an authorization code for pre-authorizations. If you clear this option, you must manually enter an authorization code for the pre-auth on the FOH tender screen before the system will allow you to continue. **Required Options:** You must select 'Require authorization' to enable this option.

Do not print vouchers — Suppresses printing all vouchers for a non-cash tender for which you do not require a signature from the guest, regardless of the amount of the transaction. This option does not apply to gift card tenders. **Related Options: 1)** To suppress voucher printing for gift card tenders, access Maintenance > Business > Store > Store Settings tab > Gift Card/Certificate Sales group and select 0 (zero) from 'Number of copies' under the 'Printing properties > Vouchers' group bar. **2)** Selecting 'Apply signature line rules for vouchers' overrides this option and prints vouchers based on the requirements you establish for signature line rules.

Apply signature line rules for vouchers — Designates this tender as one for which you want to configure whether and how the tender applies signature line rules. **Related Options:** Selecting this option disables 'Do not print vouchers' and enables 'Print when the signature ceiling is met or exceeded.' **Required Options: 1)** You must select 'Credit card' as the tender type to enable this

option. **2)** Define the requirements for signature line rules in Maintenance > Business > Store > Store Settings tab > Credit Card group under the 'Voucher print settings' group bar. **Documented Version:** v12.3.

Print when the signature ceiling is met or exceeded — Determines how to apply signature line rules to this tender. **Required Options:** **1)** You must select 'Apply signature line rules for vouchers' to enable this option. **2)** Define the requirements for signature line rules in Maintenance > Business > Store > Store Settings tab > Credit Card group under the 'Voucher print settings' group bar. **Documented Version:** v12.3.

Signature lines — Designates this tender as one for which signature line rules apply. The system prints all vouchers with signature lines when the payment is equal to or more than the amount, but no vouchers when payment is less than the amount.

Voucher — Designates this tender as one for which signature line rules DO NOT apply. The system prints all vouchers with signature lines regardless of the payment amount.

Both — Designates this tender as one for which signature line rules apply and also provides more control over the number of copies to print when the payment is equal to or more than the amount, when the payment is less than the amount, and on which copies to print a signature line.

Allow force authorization on Gift Cards — Enables you to force authorization of a gift card using the Force button on the FOH screen. You must contact NCR for custom development to use this feature. **Required Options:** **1)** You must select 'Gift card' as the tender type and Private Label from 'Gift Card provider' under the 'Type settings' group bar on the Type tab to enable this option. **2)** To provide the ability to force an authorization, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Force payment authorization' under the 'Financial' group bar, and then assign the access level to the employee. **3)** You must access Screen Designer and add the Force Tender button to your Tenders panel.

Reconciliation tab

Use the Reconciliation tab to set up the amount for each tender used, that you can be over or under the system total when counting and checking out your bank. If you select any of these options, the system includes the tender in the reconciliation process.



Reference

Refer to the [Drawer Reconciliation Feature Focus Guide - HKS310](#) or [Employee Reconciliation Feature Focus Guide - HKS307](#) for more information on configuring and using the reconciliation features.

Group bar: Reconciliation

Variance amount allowed — Defines the currency amount this tender can differ from the system total when verifying amounts for reconciliation. The variance amount applies to over and under the amount entered for reconciliation. **Required Options:** You must configure the system to use the reconciliation feature to benefit from this option.

The system recognizes the variance amount from the required generic cash tender with \$0.00 defined in the 'Default amount' text box. Variance options for all other cash tenders are not necessary and are invalid. If you entered an amount in 'Default amount' and 'Variance amount allowed,' the system ignores the variance amount.



Note

The options 'For this tender enter and print' and 'Auto Fill' appear for non-cash tenders only.

For this tender enter and print — You must select a non-cash tender to enable this option. Select from one of the following:

Total amount of all transactions — Requires you to enter the total amount when running reconciliation. For example, if the tender is defined as a Visa credit card, you must enter the total amount of all Visa transactions, without itemizing. This is the default selection. **Required Options:** You must configure the system to use the reconciliation feature to benefit from this option.

Detailed information of each transaction — Requires you to enter transaction detail when running reconciliation. For example, if the tender is defined as a personal check, you must enter each individual check. **Required Options:** You must configure the system to use the reconciliation feature to benefit from this option.

Auto fill — Populates all reconciliation fields without the need for the employee to enter the amount. This scenario would be for operations that only verify payments. **Required Options:** You must configure the system to use the reconciliation feature to benefit from this option.

Security Verification tab

Use the Security Verification tab to establish more stringent security measures for non-cash payments. You can require the entry of such things as the ZIP Code for address verification, and the entry of the security codes printed on the exterior of a credit or debit card. Depending on the card brand, this code may be referred to as the CVV, CID, CIN, CVV2, and more. This code is not stored in the track data on the card; therefore, requiring its entry ensures the card is in the actual possession of the card holder. This tab also provides security features for International use, primarily for the United Kingdom, in the way of requiring the entry of the month and year the card was issued to the card holder and the card issue number. If you enable any of the security measures on this tab, the Security Verification screen appears in the FOH during the payment process.

Group bar: Address

Use the 'Address' group bar to capture the entry of the card holder ZIP Code on the FOH Security Verification screen. The system includes the entered ZIP Code in the files it sends to the card processor. If you use a service that checks for a mismatch with the ZIP Code on record, you could reduce the credit card fees imposed by the credit card processor. In the scenario where a guest enters the ZIP Code, such as in a mobile pay environment, the system declines the card when the entry does not match the ZIP code on record and the guest must use another form of payment. To take advantage of this feature, you must determine if the Aloha system is certified for address verification (AVS) with the processor in use.

Enter address verification code — Requires you to type the card holder ZIP Code on the FOH Security Verification screen. **Related Options:** **1)** You must select 'Require identification' on the Identification tab to enable the Security Verification tab. **2)** To allow an employee to override the requirement for the ZIP Code, select 'Override security verification' in Pos Access Levels and assign the access level to the employee. **3)** Selecting this option enables the remaining options under the 'Address' group bar.

Verify address on all cards — Requires you to enter the ZIP Code for all transactions, whether you enter the card number manually or electronically. Clear this option to prompt for the ZIP Code for manually entered card numbers only. **Required Options:** You must select 'Enter address verification code' to enable this option.

Number of characters — Defines the minimum number of characters, or digits, you can type for the ZIP Code. **Required Options:** You must select 'Enter address verification code' to enable this option.

Numeric only — Shows a numeric keypad on the FOH screen and requires you to enter numeric values for the ZIP Code. Clear this option to allow the entry of characters from an alphanumeric keypad. For example, an international postal code may use alphabetic characters as well as numeric. **Required Options:** You must select 'Enter address verification code' to enable this option.

Verify address prompt — Specifies the text, such as 'ZIP Code,' to prompt for the ZIP Code on the FOH Security Verification screen. You can type up to 20 characters. **Required Options:** You must select 'Enter address verification code' to enable this option.

Group bar: Security code

Use the 'Security code' group bar to capture the card issue number. This feature is for International use, primarily in the United Kingdom, and is currently not supported by domestic (USA) processors. When you electronically slide a card through a reader, the system obtains the credit card number and other tracking information, such as the card start date and the card issue number; however, some countries require that when you manually enter a card number, you also capture the start date and card issue number in the transaction data, and some processors charge a downgrade fee if you do

not. Use the 'Security code' group bar to require you to type the card issue number. Use the 'Start date' group bar to require you to capture the month and year the card was issued to the card holder.

Enter security code — Requires you to type the card issue number, also known as the customer verification ID, on the FOH Security Verification screen. Selecting this option enables the remaining options under the 'Security code' group bar. **Related Options: 1)** You must select 'Require identification' on the Identification tab to enable the Security Verification tab. **2)** To allow an employee to override the entry of the card issue number, select 'Override security verification' in Pos Access Levels and assign the access level to the employee.

Verify security code on all cards — Requires you to type the card issue number for all transactions, whether you type the card number manually or electronically. Clear this option to prompt for the card issue number for manually entered card numbers only. **Required Options:** You must select 'Enter security code' to enable this option.

Number of digits — Specifies the number of characters, or digits, to type for the card issue number. **Required Options:** You must select 'Enter security code' to enable this option.

Security code prompt — Specifies the text, such as 'CIN #,' to prompt for the card issue number on the FOH Security Verification screen. Type up to 20 characters. **Required Options:** You must select 'Enter security code' to enable this option.

Group bar: Start date

Use the 'Start date' group bar to capture the month and year the card was issued to the card holder. This feature is for International use, primarily in the United Kingdom, and is currently not supported by domestic (USA) processors. When you electronically slide a card through a reader, the system obtains the credit card number and other tracking information, such as the card start date and the card issue number; however, some countries require that when you manually enter a card number, you also capture the start date and card issue number in the transaction data, and some processors charge a downgrade fee if you do not. Use the 'Start date' group bar to require you to enter the month and year the card was issued to the card holder. Use the 'Security code' group bar to require you to enter the card issue number.

Enter start date — Requires you to enter the month and year the card was issued to the card holder. The system includes that date in the files sent to the processor, enabling you in some cases to reduce the fees imposed by the credit card processor. Selecting this option enables the remaining options under the 'Start date' group bar. **Related Options:** To allow an employee to bypass entering the start date, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Override security verifications on tenders' under the 'Financial' group bar, and then assign the access level to the employee.

Verify start date on all cards — Requires you to enter the start date for all transactions, whether you enter the card number manually or electronically. Clear this option to prompt for the start date for manually entered card numbers only. **Required Options:** You must select 'Enter start date' to enable this option.

Start date prompt — Specifies the text, such as 'MMYY,' to prompt for the start date on the FOH Security Verification screen. Type up to 20 characters. **Required Options:** You must select 'Enter start date' to enable this option.

Group bar: Validation code

Use the 'Validation code' group bar to type the security code, such as the CVV or CID number printed on the reverse side of a debit or credit card, on the FOH Security Verification screen. The system includes that security code in the files sent to the processor. Typing a number that does not match the security code on record for the card does not cause the transaction to fail; however, if you use a service that checks for a mismatch with the security code on record, you can potentially reduce the fees imposed by the credit card processor.

Enter validation code — Requires you to enter the security code, such as the CVV or CID number printed on the reverse side of a debit or credit card, on the FOH Security Verification screen. Selecting this option enables the remaining options under the 'Validation code' group bar. **Related Options: 1)** You must select 'Require identification' on the Identification tab to enable the Security Verification tab. **2)** To allow an employee to bypass typing the security code, access Maintenance > Labor > Pos Access Levels > Access Level tab and select 'Override security verification' under the 'Financial' group bar, and then assign the access level to the employee.

Require code entry — Enforces capture of the security code. Managers cannot bypass entering the code. If you select this option, you must type the code or cancel the payment. **Required Options:** You must select 'Enter validation code' to enable this option.

For all cards manual or electronic — Requires capturing the security code for all transactions, whether you enter the card number manually or electronically. Clear this option to prompt for the security code for manually entered card numbers only. **Required Options:** You must select 'Enter validation code' to enable this option.

Presence indicator — Places additional buttons on the FOH Security Verification screen, allowing you to provide a reason for not entering the security code. **Required Options:** You must select 'Enter validation code' to enable this option. **Related Options:** If you also select 'Require code entry,' the reason buttons do not appear on the FOH Security Verification screen.

Print response code — Prints the response code returned from the processor for a security code submission on the voucher. **Required Options:** You must select 'Enter validation code' to enable this option.

Minimum number of characters required — Defines the minimum number of characters or digits, up to 10, required for the security code. For example, if the security code in your region contains three digits, select or type 3. **Required Options:** You must select 'Enter validation code' to enable this option.

Maximum number of characters required — Defines the maximum number of characters or digits, up to 10, required for the security code. You must select or type a number equal to or more than the 'Minimum number of characters required.' **Required Options:** You must select 'Enter validation code' to enable this option.

Numeric entry only — Requires you to always type numeric values for the security code. Clear this option to enable you to type characters from an alphanumeric keypad. **Required Options:** You must select 'Enter validation code' to enable this option.

Enter code twice — Requires you to type the security code twice when entering the card number manually, instead of reading it electronically from a magnetic stripe reader. A Re-enter Code # prompt appears. Both numbers must match before you can proceed. **Required Options:** You must select 'Enter validation code' to enable this option.

Text to display on prompt — Specifies the text to prompt you to type the security code on the FOH Security Verification screen. Type up to 20 characters. **Required Options:** You must select 'Enter validation code' to enable this option.

Printers tab

The Printers tab enables you to select a specific printer on which to print an extra copy of checks closed using this tender. Printers that currently exist in the database appear in the 'Available' list on the left side of the screen. Printers currently assigned to the tender appear in the 'Included' list on the right side of the screen.

Use the >> and << arrows to move printers between the 'Available' list and the 'Included' list.

Rounding tab

Use the Rounding tab to control the rounding method for tenders accepted by your Aloha POS system.

Enable rounding — Allows a payment made with this tender to round up or down based on the rounding method and the check total.

Round to ____ — Rounds the check total to the defined amount when you apply this tender. Type the rounding amount, from 0.02 to 1.00, to use for rounding the tender. **Required Options:** You must select 'Enable rounding' to enable this option. **Related Options:** To change the decimal precision of the rounding, you must access Maintenance > Business > Store > Store Settings tab > System group and select 'Use special currency' under the 'Regional Settings' group bar.

Display adjustment — Displays the rounding benefit on the guest check when you apply this tender. The rounding benefit describes the variance between the sales total and the payments total when using check rounding. The rounding benefit may also be viewed on various BOH reports. **Required Options:** You must select 'Enable rounding' to enable this option.

Print rounded indicator — Prints the text 'Rounded' after the change line on the check when you apply this tender. Use this for cash tenders only. **Required Options:** You must select 'Enable rounding' to enable this option.

Rounding method — Specifies the rounding method to use when you apply this tender. Select Up or Down if are rounding to the nearest nickel. For any other amount, select Nearest Up or Nearest Down. **Required Options:** You must select 'Enable rounding' to enable this option.

Validation tab

You can specify up to four valid prefixes for payment cards on the Identification tab; however, if you need to specify a range of valid prefixes, or specific card numbers that fall outside a range, select 'Validate' on the Identification tab to enable the Validation tab. You can add as many ranges as required to meet your needs. For example, if you offer several concepts and the same gift card prefix is valid for all three concepts, it is conceivable a guest could use the same gift card at any of the three restaurant locations regardless of the concept. To prevent this, you either must enter each valid gift card number into the tender configuration specific to each concept or enter the valid ranges specific to each concept in the Validation tab. Using this tab, you can designate as many ranges as you need; whereas, you can specify only four valid prefixes per tender on the Identification tab itself.

Group bar: Validation IDs

Identification — Designates specific gift card numbers that fall outside the ranges you enter below in the 'Validation Ranges' group bar.

Group bar: Validation Ranges

Beginning prefix range — Designates the first number in a range of gift card numbers to use when validating a gift card. Type up to 20 alphanumeric characters. Any gift card number with a prefix equal to or larger than this number, up to and including the number designated in 'Ending prefix range' is valid. **Documented Version:** v14.1.

Ending prefix range — Designates the last number in a range of gift card numbers to use when validating a gift card. Type up to 20 alphanumeric characters. Any gift card number with a prefix equal to or less than this number, and equal to or larger than the number designated in 'Beginning prefix range' is valid. **Documented Version:** v14.1.

Terminals

Select **Maintenance > Hardware > Terminals** to access this function.

The Terminals function allows you to define and configure each terminal on the Aloha network in terms of its type, its physical characteristics, and the attached peripherals.

Each Aloha system installation is licensed for a specific number of order entry terminals, each of which serves as a node or station on the Aloha network. Additional nodes are permitted beyond the licensed number of order entry terminals, but the additional nodes cannot be defined or used as order entry terminals. For example, a large system licensed for ten order entry terminals might define an additional network node for a file server. The file server functions normally on the network, but you cannot use it as an order entry terminal, and this setup would not exceed the network license limitations. The typical Aloha POS network consists of one order entry terminal per license and one computer functioning as a file server for the network, which you normally locate in an area of the restaurant that is accessible only by management personnel. Computers running remote copies of Aloha Configuration Center, used by managers for routine database maintenance, do not count against the license count, and cannot function as order entry terminals.

Peripheral devices, such as printers, pole displays, bar code readers, cash drawers, mag card readers, and monitors are physically attached to these terminal nodes to become part of the network. You define some of these devices, such as printers and monitors (display only), in their own database files and assign them to a network node, while you define others within a terminal record, such as pole displays.

Printers and monitors, although attached to a specific network node, are devices shared across the network. Pole displays, also attached to a specific network node, are not shared devices and are available only to the assigned terminal. Thus, an order entry terminal can have access to a printer in the kitchen, but not to a cash drawer at the drive-thru window or bar.

As you create new terminal records, it is important to note that Revenue Center and Term Queue are required. If no queue for the terminal is specified, the system does not allow you to save the record. If no revenue center is assigned, a warning sign appears to indicate the reports may not balance. For correct income reporting in the restaurant, we recommended you select a revenue center for the terminal.

You can define as many terminals as you have nodes on the network, of the number of terminals defined as order entry terminals does not exceed the number provided under the Aloha license agreement. Designate terminals as order entry terminals using the Order Entry Terminal option on the General tab.

Terminal tab

The Terminal tab allows you to define basic information about a terminal, such as the store to which the terminal belongs, the type of terminal, the number, name, and other identification properties of the terminal. You also use this tab to configure the peripherals attached to the terminal.

Group bar: Identification

Name — Identifies the terminal. Terminal naming conventions are set by you, however, we recommend the terminal name be descriptive or reflect its physical location, such as Bar 1, Pantry, Patio, or Dining. Type a maximum of 15 characters. Naming terminals is useful in the case of a terminal failure because the error message displays the specific location. It is also useful when you need to troubleshoot the network.

Group bar: Applications

POS — Indicates the terminal is an Aloha POS terminal. Selected by default, 'POS' enables options specifically for the Aloha POS.

Aloha Kitchen — Indicates this terminal is used by Aloha Kitchen and not the Aloha POS.

Kiosk — Indicates this terminal is an interface terminal used by NCR Kiosk and not the Aloha POS.

Related Options: **1)** Access Maintenance > Business > Installed Products and select 'Uses Kiosk' under the 'Products installed' group bar to expose this option. **2)** Selecting this option exposes the 'Kiosk' group bar here in the Terminals function, under which you designate the interface employee to operate this interface terminal.

Group bar: Settings

Model — Contains a list of the typical terminals encountered in an Aloha system environment. If the type of terminal you are using does not appear in the list, contact Technical Support for help with selecting an appropriate terminal type from the list.

Function — Indicates how the Aloha POS system environment interacts with the selected terminal.

Order entry — Designates the defined terminal as an order entry terminal. The Aloha system license does not restrict the number of terminals; however, the number of *order entry terminals* available depends upon the number permitted by the license agreement for the restaurant.

Interface server — Defines the terminal as an order entry terminal able to run an instance of the Aloha FOH application (Iber) without a dedicated user interface. The FOH application then functions to receive order information from other order entry devices, such as hand-held input devices, and distributes that information through the system to printers, display screens, and

cashier terminals. This is not an actual physical terminal; it is a “virtual” terminal. When used in this manner, the terminal performs FOH functions without the need for an order entry terminal license.

Interface terminal — Designates the defined terminal as an interface terminal. The interface terminal enables applications to communicate through Aloha Connect. The license agreement for the restaurant must include a specific number of order-entry terminals. When the selected terminal is designated as an interface terminal, you must define an order entry terminal as its output terminal in ‘Interface host.’

Radiant interface terminal — Designates the defined terminal as a Radiant interface terminal. This terminal is like the interface terminal; however, the ‘Radiant interface terminal’ does not require a terminal license, as it does not increase the count of interface or order entry terminals at the store, and it must be initialized through an Aloha application.

Order entry non-tendering terminal — Restricts your activity on this terminal to performing order entry and applying promotions and comps. You cannot tender or close a check from this terminal. Use this type of terminal in a double-window drive-thru environment for a terminal that does not have an assigned cash drawer. **Related Options:** Selecting this option enables ‘Auto login employee’ for which you can assign a generic employee for employees to use as a single login ID number. **Documented Version:** v12.3.

Allow order entry — Allows you to configure an interface terminal to enable order entry, if you do not exceed the number of order entry licenses allowed. **Required Options:** You must select ‘Interface terminal’ from the ‘Function’ drop-down list to expose this option.

Restrict order entry if not assigned to drawer — Limits the ability to enter transactions, if the employee is not assigned a cash drawer or is not configured for self-banking. **Required Options:** You must select ‘Order entry’ from the ‘Function’ drop-down list to expose this option. **Related Options:** To override this option, access Maintenance > Labor > Jobcodes > Financial tab and select ‘Self banking’ under the ‘Financial’ group bar.

Auto login employee — Assigns a generic employee to operate the order entry non-tendering terminal. Employees use this generic employee login to log in using the same ID in a double-window drive-thru environment for a terminal that does not have an assigned cash drawer. The generic employee is automatically clocked in to an order entry non-tendering terminal and that terminal continues to use the generic employee for all subsequent log ins. If the generic employee has multiple job codes available, (*not recommended*), the system clocks in the generic employee under the job code with the lowest ID. Generic employee IDs do not appear in the FOH cash drawer assignment list, nor can you associate the same generic employee to any other terminal. A generic employee cannot be configured as an interface employee. **Required Options:** You must select ‘Order entry non-tendering terminal’ to expose this option. **Documented Version:** v12.3.

Quick login option — Allows the generic employee defined as the 'Auto login employee' to log in to a non-tendering terminal with a single button touch. When enabled, the Quick Login button appears on the FOH Login screen. **Required Options:** You must select 'Order entry non-tendering terminal' from the 'Function' drop-down list and select an employee in 'Auto login employee' to expose this option. **Documented Version:** v12.3.

Interface host — Designates the order-entry terminal to receive the output of an interface terminal. Select a "virtual" terminal defined as an interface server from the drop-down list. **Related Requirements:** You must select 'Interface terminal' or 'Radiant interface terminal' from the 'Function' drop-down list to activate this option.

Terminal prefix — Specifies a prefix, up to 10 alpha-numeric characters, to identify the terminal when you use the perpetual check counter. The prefix prints before the terminal ID on each check generated from this terminal. **Required Options:** You must access Maintenance > Business > Store > Store Settings tab > Check Printing group and select 'Print check counter' under the 'Check Counter' group bar to expose this option.

Government issued-terminal ID — Specifies the terminal ID assigned to this terminal to assist in tracking from which terminal a guest check originates. This is numeric only and assists international customers in complying with requirements to print the perpetual check counter number on a guest check. **Related Options:** You must access Maintenance > Business > Store > Store Settings tab > Check Printing group and select 'Print check counter' under the 'Check Counter' group bar to expose this option. **Documented Version:** v14.1.

Group bar: Kiosk

You must select 'Kiosk' under the 'Applications' group bar to expose this group bar.

Interface employee — Designates the 'virtual' employee that works behind the scenes to perform kiosk operations from this terminal.

Group bar: Aloha Takeout

The 'Aloha Takeout' group bar appears only when you select 'Radiant interface terminal' from the 'Function' drop-down list and select a terminal in 'Interface host.'

Interface employee — Designates the 'virtual' employee that works behind the scenes to release future orders and assign orders to drivers.

1st generation return screen — Indicates the default screen an Aloha Takeout employee first accesses when returning to Aloha Takeout from the Aloha POS system, if the site installation uses the first-generation user interface. All other screens are quickly accessible, regardless of the screen

selected here. **Related Options: 1)** The system overrides this option when you define a '1st generation return screen' under the 'Settings' group bar in Maintenance > Labor > Jobcodes > Takeout tab. Your choices include:

- Customer Management
- Order Management
- Point Of Sale
- Future Order Management

2nd generation return screen — Indicates the default screen an Aloha Takeout employee first accesses when returning to Aloha Takeout from the Aloha POS system, if the site installation uses the second-generation user interface. All other screens are quickly accessible, regardless of the screen selected here. **Related Options: 1)** The system overrides this option when you define a '2nd generation return screen' under the 'Settings' group bar in Maintenance > Labor > Jobcodes > Takeout tab. Your choices include:

- Customer Lookup
- Order Pickup
- Point Of Sale
- Driver Dispatch
- Future Order
- Driver Management
- All Order List

Aloha return screen — Indicates the Quick Service screen to which an Aloha Takeout employee navigates upon selection of the Aloha button from the Aloha Takeout interface. You must use an interface terminal to configure this option. **Related Options: 1)** The system overrides this option when you define an 'Aloha return screen' under the 'Settings' group bar in Maintenance > Labor > Jobcodes > Takeout tab. **2)** This option overrides the global 'Default Aloha screen' option in Maintenance > Takeout Configuration > Takeout Settings > Panel Options tab.

Aloha tender screen — Indicates the Quick Service screen to which an Aloha Takeout employee navigates upon selection of a tender button from the Aloha Takeout interface. You must use an interface terminal to configure this option. **Related Options: 1)** This system overrides this option when you define an 'Aloha tender screen' under the 'Settings' group bar in Maintenance > Labor > Jobcodes > Takeout tab. **2)** This option overrides the global 'Aloha Tender screen' option in Maintenance > Takeout Configuration > Takeout Settings > Panel Options tab.

Keyboard present — Indicates the presence of a physical keyboard attached to the terminal. Aloha Takeout begins expecting input from this keyboard once configuration is complete.

Training interface employee — Designates the interface employee created for this terminal to perform COM functions when an ATO employee is clocked in with a 'training' job code. COM functions include releasing training future orders and assigning orders to training drivers.

Show Takeout on login — Indicates an employee logging in to this terminal logs in directly to Aloha Takeout, instead of to the Aloha POS system.

Enable advanced mapping — Identifies this terminal as one from which you can access the Map screen. **Required Options:** Access Maintenance > Labor > Jobcodes > Takeout tab and select the Mapping Driver Dispatch screen from the 'Screens' group bar for the ATO job codes that need to access the Map screen.



Reference

Refer to the [Delivery Area Feature Focus Guide - HKS351](#) for more information on configuring mapping.

Select check in summary based on terminal routing — Supports mobile ordering in Y lane environments.

Group bar: Order Point

You must have ORDERPOINT! installed for this group bar and its options to appear.

Express Order employee — Allows an employee assigned the job code configured to a cashier operating an ORDERPOINT! service, to use Express Order. ORDERPOINT! requires an employee be logged in to the POS terminal to use Express Order for accounting purposes. First you must create a generic job code, then a generic employee login ID for each terminal with an ICD device, and a generic manager login ID to allow access to functions that require manager approval. You do not need to create a generic manager job code for this employee ID, as you can use the normal manager job code.

Use customer display — Allows you to use the customer display that you configured specifically to use Express Order with ORDERPOINT! service. **Related Options:** You must configure each terminal for the device you plan to use with ORDERPOINT!. For C1230 devices, you must obtain and install NCRDisplayVerification_86.exe. For generic display devices, you must license and configure an external interface terminal for each FOH terminal using a generic display device.

Group bar: Printers

This section enables you to define and direct the output of the terminal to printers in the restaurant, according to your needs. This function provides the flexibility to print kitchen orders, labels for take-out orders, credit-card receipts, and guest checks, on different printers in different locations within the restaurant.

Default printer — Designates the printer used for local printing by this terminal. The printer may or may not be physically attached to the terminal. Local printing includes guest checks, printed reports, and messages. If you want to use digital receipts only (i.e. email, SMS text message), you must select 'None' as the default printer; otherwise, you print a physical receipt and send a digital receipt.

Related Requirements: You define printers in Maintenance > Hardware > Printers.

Voucher printer — Designates the printer at which to print EDC vouchers for credit cards. **Related Requirements:** You define printers in Maintenance > Hardware > Printers.

Label printer — Designates the printer at which to print labels that accompany take-out orders.

Required Options: You must select a Label type when you select this option. **Related Requirements:** You define printers in Maintenance > Hardware > Printers.

Label type — Indicates the specific label type to use. **Required Options:** You must select a printer from 'Label printer' to expose this option.

Group bar: Screens

Quick Service screen — Specifies a previously created Quick Service order entry screen to appear on the selected terminal. Screens defined in Quick Service are intended to work with the order entry screens on the FOH terminals.

Group bar: Fiscal Devices

You must make a selection in 'Fiscal national environment' under the 'Regional Settings' group bar in Maintenance > Business > Store > Store Settings tab > System group to expose the 'Fiscal Devices' group bar.

Primary Fiscal Device — Designates the sales recording module (SRM) to pass the sales data through to provide SRM-generated receipts to your customers. The SRM intercepts the data and adds a fiscal transaction ID and bar code to the bottom of each receipt. The SRM keeps a record and then produces periodic sales summary reports to comply with government regulations. **Required Options:** You define fiscal devices in Maintenance > Hardware > Fiscal Devices.

Backup Fiscal Device — Designates the sales recording module (SRM) to pass the sales data through to provide SRM-generated receipts to your customers when the primary fiscal device is offline. The SRM intercepts the data and adds a fiscal transaction ID and bar code to the bottom of each receipt. The SRM keeps a record and then produces periodic sales summary reports to comply with government regulations. **Required Options:** You define fiscal devices in Maintenance > Hardware > Fiscal Devices.

Group bar: Other

Revenue center — Assigns the terminal to a previously defined revenue center. For correct income reporting in the restaurant, we recommend you select a revenue center for the terminal. If you do not assign a revenue center, the system displays a warning message to indicate that reports may not balance.

Terminal queue — Defines the queue from which the terminal receives orders.

Order mode — Defines the type of orders the terminal receives (Example: Dine-In, To Go, and more).

EDC info — Used when a processor is configured with multiple indexes in EDC. The terminal must be assigned to a specific processor index. For example, if you have a CES, CES2, and CES3 processor defined in EDC, and this terminal needs to be assigned to the CES2 processor, type INDEX=2 in the 'EDC Info' text box. If you have only one processor index for the processor, you can leave this text box empty. Type a maximum of 50 characters.

Group bar: Change Due Message Box

The options under 'Change Due Message Box' allow you to define the X and Y coordinates, as well as the height and width of the Change Due message box on the FOH screen. **Related Options:** To add the table tent number to the message box, access Maintenance > Business > Store > Store Settings tab > Chit Printing group and select 'On-screen prompt' under the 'Table Tents' group bar.

Documented Version: Aloha POS v12.3.

Message box X coordinate — Defines the location along the X coordinate, in pixels, of the Change Due message box on the FOH terminal.

Message box Y coordinate — Defines the location along the Y coordinate, in pixels, of the Change Due message box on the FOH terminal.

Height of the message box — Defines the height of the Change Due message box, in pixels, on the FOH terminal.

Width of the message box — Defines the width of the Change Due message box, in pixels, on the FOH terminal.

Dismiss change due message options — Specifies how to dismiss the change due message that appears on the FOH terminal.

Dismiss on touch — Enables you to remove the FOH Change Due message by touching the screen. You must use the 'Dismiss on touch' option in the following situations:

- If you select 'Printer interface' as the 'Type' under the 'Settings' group bar on the Cash Drawer tab in Maintenance > Hardware > Cash Drawers.
- If you assigned no cash drawer to the terminal.
- If you configured self banking and the employee was not assigned a cash drawer.
- If the employee clocks in under the training mode.



Note

When you upgrade to v6.2, the system automatically selects 'Dismiss on touch.'

Dismiss on close — Enables you to remove the FOH Change Due message when you close the cash drawer.

Dismiss change due interval — Specifies the number of seconds, up to 999, for the Change Due message to remain on the screen when you do not touch the screen or close the drawer. Type 0 if you do not want an automatic removal. **Related Options:** **1)** If you select 'Dismiss on touch' and touch the drawer before the timeout expires, the system removes the Change Due message. **2)** If you select 'Dismiss on close' and close the drawer before the timeout expires, the system removes the Change Due message. **3)** If you select 'Dismiss on close' and set the timeout value to 0, and the cash drawer malfunctions, you must refresh the system to release the Change Due message. **4)** If you type a value equal or more than the value in 'Default seconds' located in Maintenance > Business > Store > Store Settings tab > Order Entry group under the 'Screen settings > Timeouts' group bar, an error message appears.

Readers tab

Options on the Readers tab enable you to define any of several input devices used to identify customers or employees, and to interface with their credit card companies, as appropriate.

Group bar: Magnetic stripe reader

Use magnetic stripe reader — Indicates a magnetic stripe reader is physically attached to the terminal. **Related Options:** Selecting this option exposes other options under the group bar.

Type — Indicates the type of magnetic stripe reader attached to the terminal. **Required Options:** You must select 'Use magnetic stripe reader' to expose this option.

Keyboard Wedge — Indicates the magnetic stripe reader attached to the terminal is a Keyboard Wedge.

OPOS MSR — Indicates the magnetic stripe reader attached to the terminal is an OPOS.

Radiant — Indicates the magnetic stripe reader attached to the terminal is a Radiant reader.

OPOS — Indicates the name of the OPOS MSR driver file as it appears in the Registry Editor (Note: You must install the driver files first). For example, the OPOS name for a Panasonic MSR would be JS-9000MSR. To determine this, access a DOS command line, type REGEDIT and press Enter. The Registry Editor appears. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and MSR. The installed drivers appear under MSR. Determine the name of the driver file to use and type it in the 'OPOS' text box. Type a maximum of 30 characters. **Related Requirements:** You must select a mag stripe reader type of OPOS MSR to activate this option.

Track 2 only — Indicates when the magnetic stripe reader uses data from track 2 of the card.

Group bar: Pen reader

You can activate pen readers for use with the system. After configuring each terminal, as appropriate, to use a pen reader, you must also enable managers to assign pen readers to individual employees.



Tip

You enable managers to assign pen readers to individual employees in Maintenance > Labor > Pos Access Levels > Access Level tab > 'Assign pen ID's' under the 'Employee' group bar.'

Use pen reader — Enables pen readers in the system. **Required Options:** You must select a 'Port' for this option.

Port — Specifies the physical port where the pen reader connects to the terminal. **Required Options:** You must select 'Use pen reader' to enable this option.

Group bar: Bar code reader

Use bar code reader — Indicates a bar code reader is physically attached to the defined terminal. If you do not use a bar code reader, clear this option. **Required Options:** You must select a 'Port' and a 'Type' for this option.

Port — Specifies the physical port where the bar code reader connects to the terminal. The system uses the reader port option when you select 'Use bar code reader.' **Required Options:** You must select 'Use bar code reader' to enable this option.

Type — Specifies the type of bar code reader attached to the terminal. **Required Options:** You must select 'Use bar code reader' to enable this option.

Group bar: Fingerprint Scanner

The options under the 'Fingerprint Scanner' group bar enable you to activate and define a fingerprint scanner for use with the system. The Aloha system makes use of biometrics technology, so no actual fingerprints are stored in the system. The system uses a pattern of landmarks when comparing an individual against the database. The Aloha system uses the identification process, rather than verification. Identification as a process is potentially faster because it is a one-step process. The system reads the scanned image of the thumb, then proceeds through the previously defined levels in the system to determine the owner of the print. Verification is a two-step process, in which the person seeking access to the system clocks or logs in, then presents his or her finger for verification of identity against patterns stored in the database.

Use Fingerprint Scanner — Enables the fingerprint scanner function in the system. **Required Options:** You must make a selection in 'Type' for this option.

Type — Specifies the type of fingerprint scanner you wish to use. **Required Options:** You must select 'Use fingerprint scanner' to enable this option.

Group bar: Proximity Reader

Use proximity reader — Indicates a proximity reader device is physically attached to the terminal. Proximity readers use radio frequency identification (RFID) technology to scan a card when it comes close to or touches the reader. **Related Options:** You must make a selection in 'Port' for this option.

Port — Specifies the physical port where the proximity reader connects to the terminal. **Required Options:** You must select 'Use proximity reader' to enable this option.

Group bar: Dallas Key reader

Use Dallas Key reader — Indicates a Dallas Key reader device is physically attached to the terminal. Dallas Key hardware devices provide an alternative to magnetic card readers and RFID proximity readers. **Related Options:** You must make a selection in 'Port' for this option.

Port — Specifies the physical port where the Dallas Key reader connects to the terminal. **Required Options:** You must select 'Use Dallas Key reader' to enable this option.

Output Devices tab

Use this tab to define the type of output devices attached to the terminal and their location.

Group bar: Pole display

Use pole display — Indicates a pole display is physically attached to the defined terminal. **Required Options:** You must select a Type and a Port for this option.

Type — Specifies the pole display model attached to the terminal. **Required Options:** You must select 'Use pole display' to enable this option.

Port — Specifies the physical port where the pole display connects to the terminal. **Required Options:** You must select 'Use pole display' to enable this option.

OPOS — Allows you to define the OPOS Line Display pole type. This text box must contain the name of the OPOS driver file as it appears in the Registry Editor (Note: You must install the driver files.) For example, the OPOS name for a Panasonic Pole Display would be JS-9000LD. To determine the OPOS name, access a DOS command line, type REGEDIT and press Enter. The Registry Editor displays. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and LineDisplay. The installed drivers display under LineDisplay. Determine the name of the driver file to be used and enter it into the 'OPOS' text box. **Related Options:** This option becomes available when you select a pole type of OPOS Line Display. This option has a maximum value of 30.

Code Page — Enables the terminal to use a set of character codes for another language with the pole display. **Required Options:** You must select 'OPOS Line Display' from the Type list box to enable this option.



Tip

The Code Page text box specifies the character set for the printer, but you must also specify the character set for the terminal using the options for the operating system. To specify the character set for the terminal, select Start > Settings > Control Panel and double-click Regional Options. Select the language option for the system.

Group bar: Coin changer

Type — Specifies the model of coin changer attached to the terminal. **Required Options:** You must select a Port for the coin changer.

Port — Specifies the physical port where the coin changer connects to the terminal. **Required Options:** You must select a specific coin changer type to enable this option.

Group bar: Aloha spy server

The Aloha system can interface with the TVS security system. You must define the TVS environment on the file server before you specify Aloha Spy parameters. **Required Options:** Access Maintenance > Business > Store > Store Settings tab > Security group and select 'Enable Aloha spy' under the 'POS Security' group bar.

Port — Indicates the TCP port value, which is the same value established for the TVS security system on the file server. This option has a maximum value of 65535.

IP address — Indicates the IP address or the name of the computer used as the file server. Type a maximum of 150 characters.

Group bar: Fiscal manager

Port — Indicates the TCP socket port value for the Fiscal Manager. This option has a maximum value of 65535.

IP address — Indicates the TCP/IP address or the name of the computer used for Fiscal Manager. Type a maximum of 150 characters.

Group bar: PIN pad

The options in this inset configure the system to use a keypad for accepting a PIN number, as entered by the customer. This type of keypad works in conjunction with debit cards.

Type — Specifies the model of PIN pad device attached to the terminal. Currently, the Aloha system supports the Verifone 1000, Verifone VX830, Everest and Everest Plus, and Ingenico IPP350 (when using Voltage or TransArmor). Everest and Everest Plus use the same emulation; therefore, they are not listed as separate devices.

Port — Specifies the physical port where the PIN pad connects to the terminal. **Required Options:** You must select a specific PIN pad type to activate this option.

Terminal ID — Designates the unique identifier assigned to the first PIN pad device attached to the POS terminal. The Terminal ID identifies the specific PIN pad device from which a debit or credit card sales transaction occurs. Currently, Moneris is the only processor that supports unique terminal IDs for PIN pad devices. Contact the processor for the unique terminal ID. **Documented Version:** v15.1

Secondary PIN pad — Designates there is a second Ingenico IPP320 PIN pad device attached to the POS terminal. **Documented Version:** v15.1.

Secondary port — Designates the COM port to which you attach the second PIN pad device.

Secondary terminal ID — Designates the unique identifier assigned to the second PIN pad device attached to the POS terminal. The Terminal ID identifies the specific PIN pad device from which a debit or credit card sales transaction occurs. Currently, Moneris is the only processor that supports unique terminal IDs for PIN pad devices. Contact the processor for the unique terminal ID. **Documented Version:** v15.1.

Customer facing PIN pad — Displays prompts on the PIN pad device that are appropriate for customer response rather than for a cashier or server. **Required Options: 1)** You must select Voltage or TransArmor from the 'Enable point to point encryption and disable credit card entry on all POS terminals' drop-down list under the 'EDC Setup' group bar in Maintenance > Business > Store > Store Settings tab > Credit Card group to expose this option.

Group bar: Token dispenser

You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'Display token distribution' under the 'Options to display' group bar, and access Maintenance > Business > Store > Store Settings tab > Token Distribution group and select 'Enable token distribution' under the 'Distribution' group bar, to expose this group bar and its options.

Type — Specifies the model of token dispenser attached to the terminal. Valid choices currently include 'None' and 'TODD.'

Port — Specifies the physical port where the token dispenser connects to the printer. **Required Options:** You must select a token dispenser type other than 'None' to enable this option.

Group bar: Order numbering

This section enables you to determine when a number is assigned to an order, as it enters the mix of order queues. This function helps to ensure that an order with relatively few items moves ahead of a larger or more complex order. The first criterion to determine if an order moves ahead in the queue is the number assigned to the order. If the system is configured for load balancing queues, the type of order is considered after the order number.

Assign an order number when — Indicates at what point to assign an order number to an order. This function is useful in a side-by-side drive-thru lane configuration where guests with simple orders, or orders with few items, can move ahead in the line when other guests are placing large or complicated orders. **Required Options:** You must access Maintenance > Business > Store > Store Settings tab > Check Printing group and clear 'Use store wide order numbering' under the 'Guest Check Content' group bar to use this option.

The first item is entered — The system assigns a number to a new order when you add the first item to the order. Orders receive numbers in sequence as the first item appears on the order, regardless of the nature of the order.

The check is sent — The system delays assigning a number to a new order until after you send the completed order to the kitchen for preparation.

EDC Settings tab

Use the EDC Settings tab to define a unique terminal ID for each terminal in the network from which you accept credit card payments.

Processor — Designates the processor used for processing credit card payments from this terminal. **Required Options:** You define processors in Maintenance > Electronic Draft Capture > Processor.

Terminal ID — Designates the unique terminal ID provided by the processor.

Customer Display tab

Use the Customer Display tab to configure the requirements for customer displays as they pertain to ORDERPOINT!. **Required Options:** You must select 'Use customer display' under the 'Order Point' group bar on the Terminal tab to enable this tab to appear.

Device type — Identifies the type of display device attached to the terminal.

Magnetic stripe readers device drivers — Specifies the drivers to use for the ICD magnetic stripe readers attached to the terminal. **Required Options:** You must select ICD from the 'Device type' drop-down list to expose this option.

Custom magnetic stripe readers device drivers — Identifies a custom magnetic stripe reader device configured in the system. Type up to 99 characters. **Required Options:** You must select 'Custom' from the 'Magnetic stripe readers device drivers' drop-down list to expose this option.

Communication method — *Allows you to select how you connect and share data with third-party applications. Valid options include Integrations and COM.* **Required Options:** You must select ODD from the 'Device type' drop-down list to expose this option.



Note

Aloha Transaction Gateway provides the ability to connect and share data with virtually any third-party application, whether it is desktop, mobile, or SaaS-based. You define integration profiles in Maintenance > System Settings > Integrations.

Communication port — *Identifies the COM port through which your display device communicates with the system.* **Required Options:** You must select ODD from the 'Device type' drop-down list to expose this option.

Kitchen tab

Use the Kitchen tab to configure the requirements for the terminal as they pertain to Aloha Kitchen.

Required Options: You must select 'Aloha Kitchen' under the 'Applications' group bar on the Terminal tab to expose this tab.

Group bar: Primary Display

Station — Designates the kitchen station to assign to the primary terminal display. **Related Requirements:** You define kitchen stations by selecting Kitchen in the product bar and then selecting Maintenance > Hardware > Kitchen Station.

Screen — Designates the kitchen screen to assign to the primary terminal display. **Related Requirements:** You define kitchen screens by selecting Kitchen in the product bar and then selecting Maintenance > Hardware > Kitchen Screen.

Bumpbar Layout — Designates the bump bar layout to assign to the primary terminal display.

Related Options: Selecting a bump bar layout exposes the 'Port' option. **Related Requirements:** You define bump bar layouts by selecting Kitchen in the product bar and then selecting Maintenance > Hardware > Bumpbar Layout.

Port — Designates the port to use for the bump bar. **Required Options:** You must select a bump bar layout in 'Bumpbar Layout' to expose this option.

Beep volume — Specifies how loud the terminal beeps when you press a button on the bump bar. Valid options are Low, Medium, Medium high, High, and Off. **Required Options:** You must select a bump bar layout in 'Bumpbar Layout' to expose this option. **Related Requirements: 1)** This option only appears with Aloha Kitchen v16.1 installed. **2)** You must use a KC4 kitchen controller (bump bar) to use this feature.

Beep frequency — Specifies the frequency, or pitch, for the beep when you press a button on the bump bar. Valid options are Low, Medium, or High. **Required Options:** You must select a bump bar layout in 'Bumpbar Layout' to expose this option. **Related Requirements: 1)** This option only appears with Aloha Kitchen v16.1 installed. **2)** You must use a KC4 kitchen controller (bump bar) to use this feature.

Beep duration — Specifies the length of the beep, from 0 to 6350 milliseconds, when you press a button on the bump bar. The default length is 100 milliseconds. To disable the beep, set the duration to 0 (zero). **Required Options:** You must select a bump bar layout in 'Bumpbar Layout' to expose this option. **Related Requirements: 1)** This option only appears with Aloha Kitchen v16.1 installed. **2)** You must use a KC4 kitchen controller (bump bar) to use this feature.

Second Bumpbar Layout — Designates the second bump bar layout to assign to the primary terminal display. **Related Requirements:** You define bump bar layouts by selecting Kitchen in the product bar and then selecting Maintenance > Hardware > Bumpbar Layout. **Related Options:** Selecting a second bump bar layout exposes additional options for configuring a second bump bar.

Second port — Designates the port to use for the second bump bar layout. **Required Options:** You must select a bump bar layout in 'Second Bumpbar Layout' to expose this option.

Second beep volume — Specifies how loud the terminal beeps when you press a button on the second bump bar layout. Valid options are Low, Medium, Medium high, High, and Off. **Required Options:** You must select a bump bar layout in 'Second Bumpbar Layout' to expose this option. **Related Requirements: 1)** This option only appears with Aloha Kitchen v16.1 installed. **2)** You must use a KC4 kitchen controller (bump bar) to use this feature.

Second beep frequency — Specifies the frequency, or pitch, for the beep when you press a button on the second bump bar layout. Valid options are Low, Medium, or High. **Required Options:** You must select a bump bar layout in ‘Second Bumpbar Layout’ to expose this option. **Related Requirements: 1)** This option only appears with Aloha Kitchen v16.1 installed. **2)** You must use a KC4 kitchen controller (bump bar) to use this feature.

Second beep duration — Specifies the length of the beep, from 0 to 6350 milliseconds, when you press a button on the second bump bar layout. The default length is 100 milliseconds. To disable the beep, set the duration to 0 (zero). **Required Options:** You must select a bump bar layout in ‘Second Bumpbar Layout’ to expose this option. **Related Requirements: 1)** This option only appears with Aloha Kitchen v16.1 installed. **2)** You must use a KC4 kitchen controller (bump bar) to use this feature.

Printer — Designates the kitchen printer to assign to the primary terminal display.

Enable touch — Enables touch screen capability for the primary terminal display.

Enable split screen — Enables two kitchen screens and kitchen stations to appear side by side or one above the other on this terminal. Command buttons in use continue to appear and function independently for each screen. **Related Options:** Selecting this option exposes additional options for configuring a split screen.

Split screen orientation — Determines the orientation of the split screen. **Required Options:** You must select ‘Enable split screen’ to expose this option.

Horizontal — Splits the terminal display horizontally and one screen appears above the other.

Vertical — Splits the terminal display vertically and the screens appear side-by-side.

Bottom (right) station — Specifies the kitchen station that appears at the bottom or on the right, depending on the split screen orientation. **Required Options:** You must select ‘Enable split screen’ to expose this option.

Bottom (right) screen — Specifies the kitchen screen that appears at the bottom or on the right, depending on the split screen orientation. **Required Options:** You must select ‘Enable split screen’ to expose this option.

Top (left) split screen percentage — Determines the percentage of screen real estate used by the kitchen screen at the top or on the left, depending on the split screen orientation.

Group bar: Secondary Display

Station — Designates the kitchen station to assign to the secondary terminal display. **Related Requirements:** You define kitchen stations by selecting Kitchen in the product bar and then selecting Maintenance > Hardware > Kitchen Station.

Screen — Designates the kitchen screen to assign to the secondary terminal display. **Related Requirements:** You define kitchen screens by selecting Kitchen in the product bar and then selecting Maintenance > Hardware > Kitchen Screen.

Bumpbar Layout — Designates the bump bar layout to assign to the secondary terminal display. **Related Requirements:** You define bump bar layouts by selecting Kitchen in the product bar and then selecting Maintenance > Hardware > Bumpbar Layout.

Port — Designates the port to use for the bump bar.

Printer — Designates the kitchen printer to assign to the secondary terminal display.

Enable touch — Enables touch screen capability for the secondary terminal display.

Enable split screen — Enables two kitchen screens and kitchen stations to appear side by side or one above the other on this terminal. Command buttons in use continue to appear and function independently for each screen. **Related Options:** Selecting this option exposes additional options for configuring a split screen.

Split screen orientation — Determines the orientation of the split screen. **Required Options:** You must select 'Enable split screen' to expose this option.

Horizontal — Splits the terminal display horizontally and one screen appears above the other.

Vertical — Splits the terminal display vertically and the screens appear side-by-side.

Bottom right station — Specifies the kitchen station that appears in the bottom or right on the secondary display, depending on the split screen orientation. **Required Options:** You must select 'Enable split screen' to expose this option.

Bottom right screen — Specifies the kitchen screen that appears in the bottom or right on the secondary display, depending on the split screen orientation. **Required Options:** You must select 'Enable split screen' to expose this option.

Top (left) split screen percentage — Determines the percentage of screen real estate used by the kitchen screen at the top or on the left of the secondary display, depending on the split screen orientation.

Group bar: Advanced

Use the 'Advanced' group bar to define external requirements for the terminal.

Remoting Port — Designates the remoting IP port for this terminal to use for communicating with the file server.

Terminated Employees

Select **Maintenance > Labor > Terminated Employees** to access this function.

The Terminated Employees function allows you to keep a separate record for every terminated employee in the system. The options for this function are the same as for Employees; however, you cannot create a new record. To automatically create a terminated record, access Maintenance > Labor > Employees > Status tab > and select 'Terminated' from the 'Employment status' drop-down list for an employee.

Status tab

While all tabs are available in the Terminated Employees function, you should only use this function to change the information on the Status tab.

Group bar: Employment status

Employment status — Indicates the current work status of the employee.

Active — Indicates the employee currently works.

Pending — Indicates a new employee awaiting approval before they can become an active employee. **Required Options:** You must access Maintenance > Business > Additional Features (Corporate Administration) > Corporate Owner tab and select 'New hires require approval' under the 'Employee maintenance' group bar to expose this option.

Terminated — Indicates the employee does not currently work. If you set the employment status back to active and save the record, the record becomes accessible only through the Employees function. **Related Options:** Selecting this option exposes the options under the 'Termination' group bar.

Group bar: Termination

This group bar appears when you set the employment status to 'Terminated' and the system access type assigned to the employee is not 'Above store only.'

Reason — Indicates the specific reason the employee no longer works for the company. **Required Options:** You must select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option. **Related Requirements:** Access Maintenance > Labor > Termination Reasons to create termination reasons.

Last day — Indicates the last date the employee worked. Type the date in mm/dd/yyyy format or click the drop-down arrow to select the date from the calendar. **Required Options:** You must select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option.

Eligible for rehire — Indicates the employee is eligible for rehire. **Required Options:** You must select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option.

Explanation — Optionally expands on the reason for the employee termination. Type a maximum of 40 characters. **Required Options:** You must select Terminated in 'Employment status' under the 'Employment status' group bar to enable this option.

Expected return date from leave of absence — Indicates the date you expect the employee to return to work after taking an approved leave of absence. Type the date in mm/dd/yyyy format or click the drop-down arrow to select the date from the calendar. **Required Options:** You must select 'Terminated' in 'Employment status' under the 'Employment status' group bar to enable this option.

Termination Reasons

Select **Maintenance > Labor > Termination Reasons** to access this function.

Use the Termination Reasons function to establish up to 50 reasons for use in the Terminated Employees function to document why an employee no longer works for the company.

Termination Reason tab

The Termination Reasons function enables you to define reasons why an employee no longer works for a company. These reasons appear in Maintenance > Business > Terminated Employees > Status tab in the 'Reason' drop-down list under the 'Termination' group bar.

Group bar: Settings

Reason — Contains the specific reasons an employee no longer works for the company. Create concise descriptions that are easy for others to understand. Type a maximum of 30 characters.

Voluntary — Indicates the selected employee chose to terminate employment for the reason listed in 'Reason.' Examples of voluntary termination reasons include: moving, back to school, accepted another job, and more.

Tracking Item

Select **Maintenance > QuickCount > Tracking Item** to access this function.

Use the Tracking Item function to define items that the restaurant counts for inventory purposes as tracking items. You can specify on which reports and screens that tracking items appear, such as the FOH Quick Count report and count screens. You can also make a specific tracking item automatically update when used, and define a priority for the item when it appears in the video summary cell.

Tracking Items tab

The Tracking Items tab allows you to define each tracking item to include in the Quick Count feature.

Group bar: Settings

Description — Provides a brief description of the tracking item. The description appears on various reports that include tracking items. Type a maximum of 25 characters.

Short name — Specifies the name that appears on the kitchen video summary cell, when using the Video Display Systems feature. Type a maximum of 15 characters. If you leave this option blank, it defaults to the same text as the Description option, but truncates at the 15 character limit.

Show on FOH quick count report — Indicates the tracking item appears on the FOH Quick Count report. When using the POS, touch the Report Quick Count button to access this report.

Auto depletion and replenishment — Adjusts the selected item sale and void counts automatically, based on sale, void, and refund quantities of the associated menu items (composite tracking items). Use this for 'Open Counts,' and 'Close Counts;' however, you must still type 'Add Counts,' 'Waste Counts,' and 'Usage Counts' because the system cannot determine these values to automatically deplete and replenish.

Show tracking item on video summary — Enables the tracking item to appear on the kitchen video summary cell. **Related Options:** Selecting this option exposes the 'Priority' and 'Video group' options, when using the Video Display Systems feature.

Priority — Dictates the order in which tracking items appear in a video summary cell, and the order in which they print on the kitchen chit, if necessary. A valid range is from 1 to 255, with an item assigned a priority of 1 appearing above an item assigned a priority of 255. **Required Options:** You must select 'Show tracking item on video summary' to expose this option.

Video group — Indicates on which monitor to show the tracking item, if necessary. Changing a video group changes the video group for all items to which it is assigned. **Required Options:** You must select 'Show tracking item on video summary' to expose this option.

Show if item is not in queue — Enables this tracking item to appear in the summary cell of the selected video group, whether the menu item appears in that cell. **Required Options:** You must select 'Show tracking item on video summary' and then select a 'Video group' other than 'None' to expose this option.

Display on projection item reports — Specifies to include the item on the Prep Projections reports. These reports compile tracking item data from prior days and weeks, to provide forecast information. This option works with the Prep Projections Interface and database.

Display item on the Open count screen — Specifies the tracking item appears on the Open Counts screen, when you press the Opening Counts button, allowing you to type the opening count for the item. **Related Options:** Type open counts manually or allow the system to automatically track the item using the 'Auto depletion and replenishment' function. If manually typed, open counts include the existing item inventories at the start of the business day. If automatically calculated, opening counts equal the closing counts on the previous business day.

Display item on the Usage count screen — Specifies the tracking item appears on the Usage Counts screen when you press the Usage Counts button, allowing you to type usage counts. Usage counts refer to items that you use but do not sell or enter through the POS in the FOH, such as donations to the local school, or free employee meals.

Display item on the Close count screen — Specifies the tracking item appears on the Close Counts screen when you press the Close Counts button, allowing you to type closing counts, or allowing the system to automatically calculate the closing count based on the other counts for the day. Close counts include the existing item inventories at the close of the business day, which then roll over to the following business day for the opening count.

Display item on the Add count screen — Specifies the tracking item appears on the Add Counts screen when you press the Add Counts button, allowing you to type add counts for item deliveries for the restaurant to add the count to inventory.

Display item on the Waste count screen — Specifies the tracking item appears on the Waste Counts screen when you press the Waste Counts button, allowing you to type waste counts for items thrown away or unused, such as over-production and spoilage.

Users

Select **Maintenance > Labor > Users** to access this function.

Note

Effective with Aloha Configuration Center/Aloha Manager v18.6, you configure and manage employees requiring Front-of-House (FOH) access and employees requiring above-store access (BOH) using two separate functions: Employees and Users. Upon upgrade, no special action is required; however, any employee designated as 'Above store only' or 'POS and above store only' in the Employees function is automatically migrated to the new Users function. You continue to use Employees to configure and manage employees who log in to the FOH but you use the Users function to configure and manage employees requiring above store access or POS and above store access.

After the upgrade, CFC users choose the level of ownership to assign a user (i.e. Corporate or a specific site) using the New drop-down arrow in Users. Typically, there is only one Global user per company.

System tab

Group bar: User

User name — Identifies the user ID the employee uses to log in to the system. Type a maximum of 25 characters. This is a required entry. Be sure to name any Corporate user so that it is easy to identify the level of ownership to which it is assigned.

Reset password — Clears the stored password the employee uses to log in to the BOH, and prompts you to enter a 3 to 12 character temporary password for the employee. Note: You must save your changes or the temporary password will not take effect. The next time the employee logs in to the BOH with the temporary password, they receive a prompt to enter a new password. Required Options: 1) To reset a BOH password, your security role must have 'Reset CFC Password' selected under the 'Maintenance > Labor' group bar on the POS tab in Maintenance > Labor > Security Roles

Change password — Enables you to create a new BOH password for the employee. To change a BOH password, your security role must have 'Change CFC Password' selected under the 'Maintenance > Labor' group bar on the POS tab in Maintenance > Labor > Security Roles.

The new password must meet the following requirements:

- a. Must contain 7 to 25 characters.
- b. Has not been used in the previous four passwords.
- c. Must not contain the employee user name, first name, last name, middle name, nick name, or ID number.
- d. Must contain a number (0-9).

e. Must contain at least two of the following three character groups:

English uppercase (A through Z)

English lowercase (a through z)

Special character (i.e., ! @ # \$ % ^ & * () _ +)

Example of a valid password: Nojog1!

Example of an invalid password: PORSCHE

Email address — Specifies the employee email address.

First name — Specifies the first name of the employee. Type a maximum of 30 characters. A warning message appears when you attempt to save the new employee record, if there is an existing employee with the same first and last name. This is a required entry.

Last name — Specifies the last name of the employee. Type a maximum of 30 characters. A warning message appears when you attempt to save the new employee record, if there is an existing employee with the same first and last name. This is a required entry.

Middle name — Specifies the middle name of the employee. Type a maximum of 30 characters.

Nickname — Specifies the name printed on the chit and guest check. Use this option to use an abbreviated employee name or a nickname on customer checks. If you enter a nickname both here and in the Employees function, the nickname entered here is used. If left blank, the Aloha POS system uses the first name of the employee.

POS employee number — Identifies the existing employee number in the Employees function, if applicable.

Inactive — Designates the employee is not an active employee. Clear this for each user requiring access to the Back-of-House functions.

Security role — Allows you to assign a security role for the user level and determines what functions and actions the user can do within the selected site.

User level — Allows you to assign a user level to an employee to control access to payroll information in the Employees function, Users function, Terminated Employees function, and any reports that publish payroll information. Assigning a user level restricts that user level from editing or viewing restricted information on an employee record with a user level equal to or greater than the current level. Printed or on-screen reports do not show payroll information for any levels greater than or equal to the current user level. Valid user levels include User level 1 through User level 9. User level 9 (Admin) has the highest level of access; and user level 1 (Least Privileged) has the minimum level of access. **Required Options:** Access Maintenance > Business > Installed Products (CFC users access Maintenance > Business > Global Administration) and select 'Enable User levels' under the 'User Levels' group bar to expose this option. This option does not appear when logged in as a

corporate employee; it is available only when logged in as a global employee. **Required Versions:**
Aloha POS v15.1.53 and CFC v20.10.

Group bar: Authorization

You may also choose to authorize a user to access and act upon other ownerships within Aloha Configuration Center/Aloha Manager.

Use the >> and << arrows to move an ownership between the 'Available' list and the 'Included' list.

Allowed owner — Designates the store to which you allow this user to access and act upon data.

Termination — Identifies the date in which the employee was terminated.

Reason — Specifies the reason for the termination, whether voluntary or involuntary.

Eligible for rehire — Designates the eligibility of the employee to return to the company.

Explanation — Provides further details regarding the eligibility of the employee to return to the company.

Expected return date from leave of absence — Specifies the return of the employee should there be a leave of absence.

Video Controllers

Select **Maintenance > Hardware > Video Controllers** to access this function.

The Video Controllers function is required only when you interface with a third-party video software provider, such as QSR and Progressive. This function controls the configuration for two key components of the video set up process: Devices and Keypads. Use the options on the Device tab to set up and define the video devices used in the food preparation areas. **Required Options:** You must select 'Display VideoMX' under the 'Options to display' group bar in Maintenance > Business > Additional Features to expose this function.

Video Controller types

When you create a new video controller, you must select the type of controller to create. The type of controller you select determines the options that appear for configuration. Select from the following types, when you click the New drop-down-arrow to add a new video controller:

- Aloha
- IBM
- Progressive
- Select
- QSR
- Radiant



Note

If using Select or IBM Video, determine the device number prior to defining devices. To do this, remove the video controller case to read the pin jumps.

Use the options on the Keypad tab to designate the ASCII or keyboard character used to perform the corresponding function.

The system supports cell layouts containing either variable cell lengths, or cells of the same size. You can define the number of rows and columns, and include an ending summary cell as the last cell. The system also supports the display of two video queues on the same monitor.



Figure 4 - 16 Top and Bottom Split Video Screen with Variable Cell Length

When using variable cell lengths, the system generates a vertical line to separate each column. A blank line that acts as a separator between orders follows each order. The system numbers cells vertically and reserves space on the last order cell for the scroll indicators, the summary cell, and each cell heading.

The system initially displays a complete order starting at the top of the leftmost column. When the screen is full and there is not enough room to display an entire order, the system shows a partial order with the header, the first item, the 'continued' indicator, and the scroll indicator. You can bump an order that is currently visible on the screen, including partial orders, but you can not bump hidden orders (orders that are not visible on the screen).

When you select a video device type, the Keypad tab populates with the default options for the physical bump bar; however, newer bump bar devices may require you to alter those configurations.

For example, if 'Bump Cell Left' populates with the letter 'L,' but the physical bump bar uses '<,' change **L** to **<**. To bump to the left on the video screen, press **<**, located on the bump bar.

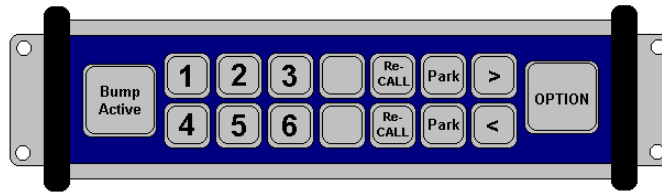


Figure 4 - 17 Sample Bump Bar

Use the Device tab to set up and define the video devices used in the food preparation areas.



Note

If using Select or IBM Video, determine the device number prior to defining devices. To do this, remove the video controller case to read the pin jumps.

Device tab

The Device tab enables you to set up and define the video devices used in the food preparation areas.

Group bar: Settings

Name — Identifies the video device.



Note

When defining a new device, the system defaults to the next unassigned number, based on the number of the previous video device record. For example, if video device number 2 appeared previously on the video device tab, 3 appears as the next video device number. If 3 is already in use, 4 appears as the next video device number. If you want to select a different number, click the ellipsis (...) next to 'Number' to display the Number Assignment dialog box.

Device ID — Specifies the hardware ID number associated with the device.

Use touch screen — Enables the touch screen capability for the selected device.

Has keypad — Indicates the video controller device uses a bump bar with a keypad.

Group bar: Cell layout

Variable cell length — Enables video cells to use variable lengths determined by the number of items in the order. If cleared, all video cells display with the same length. Progressive KPS does not support variable cell lengths.

Rows — Specifies the number of rows that appear on the video monitor. Type a maximum of 9 rows. The default is 2 rows. Rows are not supported with the variable cell length feature. **Required**
Options: You must clear 'Variable cell length' to enable this option.

Columns — Specifies the number of columns that appear on the video monitor. Type a maximum of 9 columns. The default is 4 columns.

Number of summary cells — Indicates the number of cells the Summary screen covers when activated. The Summary screen accumulates orders in finalized mode and shows how many of each item needs to be made. You can toggle the Summary screen on and off, as needed.

Group bar: Window position

Top — Indicates the starting 'Y' coordinate for the top, left corner of the window display.

Left — Indicates the starting 'X' coordinate for the top, left corner of the window display.

Width — Specifies the width, in pixels, of the video image.

Height — Specifies the height, in pixels, of the video image.

Group bar: Chit names

Change chit names — Allows you to select an alternate chit name for output.

Default chit name — Allows either the chit name, the alternative name, or both to appear on the window display. **Related Requirements:** You must select 'Change chit names' to expose this option.

Keypad tab

The Keypad tab enables you to configure the key pad navigation options for the bump bar.

Group bar: Settings

Keypad ID — Specifies the unique identifier for the keypad.

Bump 1st cell through **Bump 8th cell** — Specifies the keypad characters you use to represent the bump 1st cell through 8th cell commands. The character options change, based on the type of device you select.

Scroll left — Specifies the keypad character you use to scroll left. The character options change, based on the type of device you select.

Scroll right — Specifies the keypad character you use to scroll right. The character options change, based on the type of device you select.

Recall last order — Specifies the keypad character you use to recall the last order, if desired. The character options change, based on the type of device you select.

Summary on/off — Specifies the keypad character you use to toggle the summary on and off, as desired. The character options change, based on the type of device you select.

Refresh display — Specifies the keypad character you use to refresh the screen display. The character options change, based on the type of device you select.

Toggle queue — Specifies the keypad character you use to toggle the view back and forth, between queues.

Toggle split screen — Specifies the keypad character you use to toggle the split screen focus between queues. The character options change, based on the type of device you select.

Toggle queue on/off — Specifies the keypad character you use to activate the 'toggle queue on' and 'toggle queue off' commands. The character options change, based on the type of device you select.

Video Groups

Select **Maintenance > Hardware > Video Groups** to access this function.

Video Groups provide the ability to route items to video monitors located in the kitchen prep areas. You must assign each item that needs to appear on a video monitor to a video group. A video group can contain only one video monitor or multiple monitors, enabling items requiring two or more preparation areas to be routed to a video monitor in each area. For example, a grilled chicken salad needs to route to the grill area and cold foods area. **Required Options:** The Video Groups function appears only when you select 'Uses Kitchen' under the 'Products installed' group bar in Maintenance > Business > Installed Products > Global tab or 'Display VideoMX' under the 'Options to display' group bar in Maintenance > Business > Additional Features > Corporate Owner tab.



Reference

Refer to the [Aloha Kitchen Implementation Guide - HKS328](#) for more information on using Video Groups with Aloha Kitchen.

Video Group tab

Use the Video Group tab to add and identify video groups.

Group bar: Settings

Name — Identifies the video group. We recommend you use a name that describes the purpose or location (e.g., Kitchen, Counter, Drive-thru) of the video group.

Override item highlight color — Allows you to set the highlight color to something other than the default.

Override item priority — Allows you to change the item priority for items in the video group to something other than the default, if desired.

Video Queues tab

Use the Video Queues tab to select specific video queue display devices to include in the video group. The video queues currently available for assignment to a video group appear in the Available list on the left side of the screen. The video queues already assigned to the video group appear in the Included list on the right side of the screen. You can select up to five video queues per group.

Related Requirements: You define video queues in Maintenance > Hardware > Video Queues.



Caution

If you access Maintenance > Hardware > Video Queues and select 'Bump to video group,' then assign a queue to a video group that would subsequently cause a system loop, an error message appears.

Use the >> and << arrows to move selected video queues between the 'Available' list and the 'Included' list. The column headings that appear in the 'Available' and the 'Included' lists are as follows:

Number — Indicates the unique number assigned to the video queue.

Name — Identifies the specific video queue.

Video Queues

Select **Maintenance > Hardware > Video Queues** to access this function.

Use Video Queues to define the video devices where orders appear in the kitchen for preparation. You can use the standard setting, or set up the queues to use load balancing, which attempts to distribute the orders among the video devices. The Video Queues function appears only when you select 'Uses Kitchen' under the 'Products installed' group bar in Maintenance > Business > Installed Products > Global tab or 'Display VideoMX' under the 'Options to display' group bar in Maintenance > Business > Additional Features > Corporate Owner tab.

You can define the video to use the split screen functionality to show two queues on the same monitor, either top and bottom, or left and right.

If using an unequal number of columns per queue, when you split a video screen left and right, the right queue has more weight. For example, if you define the screen as a 2 x 5 grid, the left queue appears in the two leftmost columns and the right queue appears in the remaining three columns.

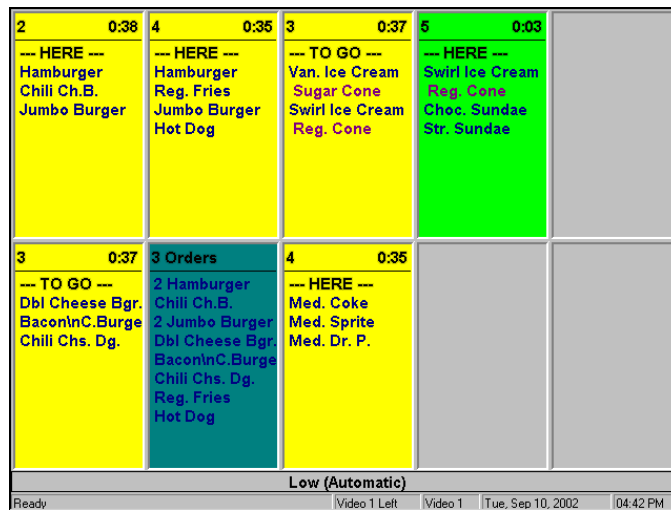


Figure 4 - 18 Split Screen with Unequal Number of Columns per Queue

Orders can span across multiple monitors if they are set in the Video Queue Maintenance screen. You can define up to five video devices to show items that are sent to the queue.

For example, if you send hamburgers to Queue 1 and Queue 1 appears on Device 1, Device 2, and Device 3, then when Device 1 fills, the next order appears on Device 2. In turn, when Device 2 fills, the next order appears on Device 3, and so on.



Reference

Refer to the [Aloha Kitchen Implementation Guide - HKS328](#) for more information on using Video Queues with Aloha Kitchen.

Video Queue types

When you create a new video queue, you must select the type of queue to create. Click the New drop-down-arrow to select from the following types, when you add a new queue:

Standard indicates a standard video queue set up for the device and keypad.

Load balance indicates a video queue that automatically distributes orders to multiple queues, based on individual queue load.

Video Queue tab

The Video Queue tab enables you to define where orders appear in the kitchen for preparation.

Group bar: Settings

Name — Identifies the video queue. Video queue naming conventions are set by the user.

Type — Indicates the type of video queue selected from the 'Type' list box. This option is read only.

Display method — Determines when the items appear on the video monitor once employees enter the order.

Display items as entered — Sends each item to the video screen within five seconds after entering on the order screen. Use this method when you want orders to reach the food preparation staff as soon as possible. Items are not yet finalized (see Display When Finalized below) and may be deleted or changed.

Display one behind — Sends each item to the video screen as soon as you enter the next item. Items appear to food preparation staff within seconds after entering on the order screen. Finalizing the order sends the last item on an order. Using this method can curtail sending premature information about an ordered item, considering last second changes to item modifiers.

Display order when finalized — Sends all items on an order to the video screen, only after you finalize the order. A finalized order is an order that was sent to the kitchen for preparation. Orders are considered finalized if you have ordered all the items and sent them to the kitchen (in Table Service), you close the order (in both Table Service and Quick Service), you total the order (in Quick Service), or you navigate away from the order screen (in Quick Service).

Display Default order mode — Shows the default order mode on the video display as you enter the items on the guest check, if you are using the 'Display Items as Ordered', or the 'Display One Behind' options as your display method. **Related Options:** In Quick Service, you define the default order mode in Maintenance > System Settings > Terminals or Maintenance > System Settings > Order Entry Queue.

Display check total in video cell — Enables the total of the check to appear in video cells.

Display check paid/unpaid status in video cell — Shows 'Check Paid' or 'Check Unpaid' on the bottom line of the video cell, depending on the state of the check. **Related Options:** If you select this option in conjunction with 'Display Check Total in Video Cell,' the video cell shows 'Paid' and 'Unpaid.'

Cannot bump from video device until check closed — Restricts bumping open checks from video screens.

Display add-on items in original cell — Shows add-on items in the same cell with the originally ordered items. An 'Add-On' header appears in the cell to identify the add-on items.

Group bar: Options

Starts timer — Enables the video to start order delay timers. You must select this option for any monitor to which you route items with specified delay times.

Bump from all video queues — Enables the dispatcher to bump all instances of an order from all monitors upon completion. Orders bumped from the 'master' monitor, bump from all video screens. This option is not available with Progressive.

Bump to video group — Specifies a video group to receive bumped orders.

Summary cell items — Indicates which items appear in the summary cell of the video screen.

Show menu items — Shows menu items in the Summary cell.

Show tracking items — Enables you to show only those menu items defined in Aloha Quick Count, in a summary cell that shows tracking items. **Related Options:** Only items set up as tracking items show in the summary cell.

Split screen — Indicates how you want different order queues to appear on the same video screen (either top and bottom, or left and right). Select one of the following options to enable users to view orders from different order queues on the same video screen. **Related Options:** This option works in conjunction with the 'Cell Layout' section of the Video Controller screen.



Caution

Be aware that the system disables the split screen feature when mixing a top or bottom video queue with a left or right video queue, and creates an error in VERIFY.TXT until you correct the configuration.

None — Disables the split screen feature.

Top — Indicates the queue appears on the top of the screen.

Bottom — Indicates the queue appears on the bottom of the screen.

Left — Indicates the queue appears on the left side of the screen.

Right — Indicates the queue appears on the right side of the screen.

Group bar: Hardware

You must select 'Standard' as the video queue type to enable this group bar and its options.

Controller #1 through Controller #5 — Identifies the specific video device used for the queue. You can define up to five video devices for each queue; however, you cannot select a specific device more than once.

Group bar: Load balancing

You must select 'Load balance' as the video queue type to enable this group bar and its options.

Balancing method — Identifies the type of method used to distribute orders to multiple queues, based on the individual queue load. Options include:

By number of orders — Distributes the orders to the queues based on the number of orders.

By number of items — Distributes the orders to the queues based on the number of items.

Queue 1 through Queue 5 — Identifies the specific queue to use for load balancing. You can define up to five video queues; however, you cannot select a specific queue more than once.

Video Groups tab

The Video Groups tab enables you to assign video groups to a video queue. You define video groups in Maintenance > Hardware > Video Groups.

Group bar: Video Group Assignment

Use the >> and << arrows to move selected video groups between the 'Available' list and the 'Included' list. The column headings that appear in the 'Available' and the 'Included' lists are as follows:

Number — Indicates the unique number assigned to the video group.

Name — Identifies the specific video group.

Void Reasons

Select **Maintenance > System Settings > Void Reasons** to access this function.

Use the Void Reasons function to define a list of reasons you can void an item from the FOH, for auditing and reporting purposes. You can configure each void reason to affect or not affect inventory within the Aloha system.

When an employee attempts to delete an item sent to the kitchen from a guest check, the system requires a reason for the deletion. If 'Void items' is selected for the access level to which you assign an employee, that employee can enter their password at the 'Enter manager password' prompt, select a reason for the void, and complete the transaction. Without that access, a manager must complete the transaction. If 'Allow to void own items' is selected for the job code under which an employee clocks in, no password message or void reason appears.



Note

If an employee is assigned to a job code with 'Allow to void own items' selected, the Void Report indicates 'Void Reason UNKNOWN.'

Void Reason tab

Use the Void Reason tab to define basic information about why you must perform a void.

Group bar: Settings

Description — Identifies the void reason. Make the name descriptive for ease of reference. Type a maximum of 15 characters.

Return voided items back to inventory — Used to determine whether the void reason affects inventory. Void reasons that affect inventory add the item back into inventory and allow the item to be sold again. Void reasons that do not affect inventory do not change the inventory count or item availability. **Related Options: 1)** To set a time limit to void items, access Maintenance > Business > Store > Store Settings tab > Security group and select 'Limit the time that items can be voided after ordering' and specify a time interval in 'Number of minutes' under the 'Restrictions' group bar. After the specified time expires, the system no longer accepts a void for a given order.

For Aloha Connect Use Only — Specifies this void reason is only used for an application that communicates using Aloha Connect. Use this for applications such as Aloha Takeout Delivery (ATOD)

Do Not Report — Indicates this void reason does not appear on the BOH Audit report or BOH Voids report. Use this option for voids in other applications such as Aloha Takeout Delivery (ATOD).

Required Options: You must select 'For Aloha Connect Use Only' to enable this option

Volume Level

Select **Maintenance > System Settings > Volume Level** to access this function.

The Volume Level feature is available when you are using a third-party kitchen display system. This feature enables you to indicate the sales volume level that appears on the video display to reflect if the level of sales volume increased or decreased. This helps the kitchen staff know to prepare more food to accommodate a sudden spike in business.

This feature shows a volume level name on order entry terminals, that is reflective of the level of business that takes place in the restaurant within a specified time interval. The names are driven by specific gross sales levels. For example, if you create a volume level called 'Slow' and define a sales level range of \$0.01 to \$199.00 for that level, when the current level of sales at the restaurant is between \$0.01 and \$199.00, the label 'Slow' appears on the order entry terminal.



Tip

You need to add a separate volume level button on the order entry terminal, for each volume level create. Refer to the [Quick Service Screen Designer Guide](#) to learn how to add a button to an order entry screen.

Defined time intervals are cumulative up to the current moment. For example, if you define the time interval as 30 minutes, the volume level appearing on the order entry terminal reflects the amount of business on record for the previous 30 minutes. Promise times are set for increasing amounts of time, as the level of business increases.

Volume Level tab

Use the Volume Level tab to specify a volume level name to appear on order entry terminals, that is reflective of the level of business that takes place in the restaurant within a specified time interval. This feature also provides the ability to set promise times for delivery items during specific levels of business.

Group bar: Settings

Name — Identifies the volume level. We suggest making it descriptive of the level of sales/business volume. Type a maximum of 20 characters.

Low amount for gross sales over reporting interval — Indicates a dollar amount representing the least amount of product sold for the volume level within a given time interval. Valid entries range from 0 to 999999999.99. An error message appears under the following conditions:

- If the amounts set for different volume level records overlap, an error message appears.
- If gaps occur between the low and high amounts set for all the volume level records, an error message appears.
- At least one record must have a low amount of '0.00' or an error message appears.

High amount for gross sales over reporting interval — Indicates a dollar amount representing the maximum amount of product sold for the volume level within a given time interval. Valid entries range from 0 to 999999999.99. An error message appears under the following conditions:

- If the amounts set for different volume level records overlap, an error message appears.
- If gaps occur between the low and high amounts set for all the volume level records, an error message appears.
- If the 'high amount' is not more than or equal to the 'Low amount,' an error message appears.

Promise time based on volume level (HH:MM:SS) — Indicates how long to delay the delivery time for an item, based on the current level of business. For example, during slow business times you might enter 15 minutes (00:15:00); however, if the business level is fast, you might enter 35 minutes (00:35:00) to reflect the expected additional delay.

Waive Break Messages

Select **Maintenance > Messaging > Waive Break Messages** to access this function.

Use the Waive Break Messages function to create the messages to offer your employees the option to waive their consensual breaks. We recommend you word the message in the form of a question where the employee can respond in a yes or no fashion, such as “Would you like to waive your meal period break for this shift?” Ideally, you would create a message specific to each break rule that can be waived.

Message tab

Group bar: Settings

Name — Identifies the message. Type a maximum of 20 characters.

Group bar: Text

Line 1 through Line 5 — Type a message that is descriptive of its purpose. We recommend wording this message in the form of a question, such as “According to state law, you are entitled to an unpaid 30 minute break. Would you like to waive your break for this shift?” You can enter five lines of text at 50 characters per line.

Jobcode tab

Use the Jobcode tab to select specific job codes to include as recipients for the selected Waive Break message. The job codes currently available for assignment to the selected message appear in the Available list on the left side of the screen. The job codes already assigned to the selected message appear in the Included list on the right side of the screen.

Use the >> and << arrows to move selected job codes between the ‘Available’ list and the ‘Included’ list.

Aloha glossary

B

BOGO (Buy One Get One)

A type of promotion in which the customer purchases one item at the regular price and receives another of the same item free or at a discount.

BOH (Back-of-House)

The file server from which Aloha Manager is launched. This file server also stores the dated subdirectories created during the EOD process.

C

Checkout

Checkout is a process that generates a printed listing of sales, payments, comps, promos, cash due, and so on, for a specific employee. A checkout is performed at the end of the employee's shift in preparation for turning in money due the restaurant prior to the employee clocking out. This is only required of employees who handle money.

Chit

A printed version of the customer's order. It prints or displays on remote printers or video monitors which are typically located in the bar and/or kitchen area. This aids the kitchen personnel and bartender in preparation of the order.

Clockout chit

A printed receipt showing the date and time an employee clocked out, and the employee's name, job code, and unpaid break times.

Comps

A method in which items on a guest check are discounted (given away as complimentary) by a dollar amount or a percentage. Typically used for frequent diner incentives, employee meals, or to appease an upset customer.

Cool interface

One of three color themes available for the FOH (Front-of-House), including: Marble, Fabric, Blue Stone, and Wave. These are in addition to the default interface.

CounterService

Aloha Quick Service setting which limits the end-user to two FOH terminals and three remote printers or remote display systems. All other functionality is the same. Allows the Aloha POS system to be cost effective and cost competitive for smaller venues (Mom & Pop shops).

D

DATA subdirectory

The \Data subdirectory contains the working data for the FOH terminals of the restaurant, and is a subdirectory of the \Aloha directory.

Dated subdirectory

The directory or file folder created by the EOD (End of Day) process that contains all of the sales data and all other data for that DOB (Date of Business). These dated subdirectories are stored on the BOH file server.

Day Parts

Day Parts are defined to divide the day into parts for reporting purposes, such as Breakfast, Lunch, Dinner, Happy Hour, and so on. The Event Scheduler triggers period changes using only a start time, with the subsequent period start time serving as the end time for the previous period.

DBF

Database files. These files have a .DBF extension.

Debout (Debugging Output) files

Debugging output files are created by and used by the Aloha POS system for system troubleshooting. A separate debout file is created for each terminal on the network including the BOH file server. Debouts are also created for the EOD (End-of-Day) process, EDC (Electronic Draft Capture) for credit card processing, the grind process, and so on.

DOB

Date-of-Business.

Done30

Marker file created by the EOD (End-of-Day) process to indicate the EOD completed successfully.

E**EDC (Electronic Draft Capture)**

EDC is the technology used in the processing of credit card, debit card, and gift card transactions as payment for goods and/or services.

EGI (Enhanced Graphic Interface)

EGI enables you to use gradient, shadowing, and texture enhancements on the buttons on the FOH. If the computer running the interface has High Color (16 bits or greater), and has 64 MB of RAM or greater, the feature is automatically enabled. If the system does not meet these requirements, the regular default screen appears.

Environment variables

Environment variables are strings consisting of environment information, such as a drive, path, or file name, associated with a symbolic name that can be used by operating systems, including: Windows95, Windows98, and WindowsNT. The defined environment variables are read and set by the system when it boots up. (Examples: path to the Aloha POS software, number of terminals on network, whether the terminal is capable of serving as master terminal or server.)

EOD (End-of-Day)

The EOD (End-of-Day) process is a simple procedure that closes out the sales for a given DOB (Date-of-Business) and starts the new DOB with a fresh Trans.log (transaction log) file and fresh Prt#.log (printer log) files. The EOD process is typically scheduled to occur as an automatic process every day at a certain time during a non-peak period; however, the EOD may be run manually from either the FOH (Front-of-House) or BOH (Back-of-House).

Event

Many common restaurant procedures for standard operations can be automated using the Event Scheduler. The Event Scheduler can be configured to automatically activate menus, reroute printers, change meal periods, change order entry modes, automate the EOD process, or any other activity that has an Active option switch as part of the database file record.

F**File server**

The file server is the BOH computer which launches the Aloha Manager program.

FOH (Front-of-House)

FOH is the interface accessed by servers, bartenders, managers, cashiers, and other restaurant personnel to clock in/out, ring transactions, close checks, perform checkouts, and so on. FOH also refers to the hardware used at the FOH workstations.

G**GndDBF30.XXX**

Marker file created by CTL (Control) to indicate that the grind process for a given DOB completed successfully.

Grind

The grinder (Grind.exe) is a BOH executable program which reads the Trans.log (transaction log) for a given DOB and creates a series of DBF files which contain all relevant information for that DOB. This program insulates other system components from the need to understand the encrypted, proprietary transaction log. The grinder is typically invoked automatically by the Control program approximately 30 seconds following a successfully completed EOD process. If the grinder is successful, it creates a marker file, GndDbf30.XXX, and places it in the dated subdirectory created during the EOD process.

H**House accounts**

The House Account feature is available for use as an accounts receivable module within the Aloha POS system, when combined with a correctly defined house account tender.

I**Iber (Iber.exe or IberQS.exe)**

Iber.exe and IberQS.exe are the executable program files that launch the FOH interface for Table Service and Quick Service, respectively.

IberCfg.bat

IberCFG.bat is a batch file which contains all of the Aloha POS environment variables. We recommend calling this batch file from within the AutoExec.bat batch file so that the environment variables are read and set when the system boots up.

Iberdir

Stands for Iber directory and represents the drive letter and full path up to the \Bin directory of Aloha. When referring to iberdir in this document, you must type the full path up to the \Bin directory, as installed on your system. For example, if you installed Aloha QuickService on drive

C, <iberdir> represents C:\AlohaQS, or if you installed Aloha QuickService under a bootdrive share on drive C, <iberdir> represents C:\Bootdrv\AlohaQS.

Indirectly Tipped

Refers to an employee who receives tips from a tipped employee instead of the customer, such as bussers, hostesses, and dishwashers, and are legally required to declare tips. Typically, this scenario is used with a tipshare pool.

Item Lookup

The Item Lookup function allows the price of an item to be located using its name or SKU (Stock Keeping Unit) number as defined in Item maintenance. The Item Lookup function was created to be used in a retail environment; however, it is not necessarily limited to retail items only.

M

Mag Card Reader or Mag Stripe Reader

A mag card reader is a device that reads and interprets the magnetic stripe encoded on a credit card, debit card, smart card, or other card used by an employee to log on to the Aloha POS system.

Master terminal

The master terminal acts as a sort of arbitrator among the terminals on the network, and manages some important network communication tasks. The master terminal is responsible for running the EOD process.

Mastercapable

Mastercapable is an environment variable which stipulates whether a terminal is capable of taking over as the master terminal in the event that the true master terminal is down or cannot be located by other terminals on the network.

N

NewData Directory

The NewData directory is the subdirectory of the \Aloha directory which contains data that has been changed or modified, but is not currently being used by the FOH at the restaurant.

O

Order Time

Order time is the time at which items are 'sent to the kitchen'. When using the Advance Orders feature, the system uses the following calculation: $\text{Serve Time} - \text{Prep Time} = \text{Order Time}$.

Ordered Items

Ordered items are items that are 'sent to the kitchen'. The text displays as black in the guest check window and you must perform a void to remove them from the check.

P

Pivot Seating

Pivot seating enables you to place orders by seating position of the table to ensure correct tray set up and delivery of food. Restaurants employing this method have a point of reference as the first seating position to start orders, such as the seat facing the bar or the front door.

PLU (Price Look Up)

The PLU (Price Look Up) function allows the price of an item to be located using its PLU number as defined in Item maintenance.

PMS (Property Management System)

The industry standard interface for hotels to manage the various functions of a hotel. The Aloha POS system interfaces with the following PMS systems: Aloha PMS, Generic Micros 4700, Encore, RDP, Springer Miller, HIS, CSS, and Fidelio.

POS

Point-of-Sale

Prep Time

Indicates the time required to prepare an order.

Printer groups

Printer groups allow individual printers to be combined into logical groups, once the individual printers have been defined in Maintenance. This allows routing of items to individual or multiple remote printers for chit printing. Printer groups can contain between zero and five individual printers, and are attached to the item at the item level in Item maintenance.

Printer logs

All printing for the current DOB is stored in printer log files called Prt#.log, with the # being a variable corresponding to the record ID for each printer as defined in Maintenance. These log files are located in the Data subdirectory of \Aloha, and function similarly to the Trans.log, containing all printing that has been sent to a given printer on the current day, as well as indicators as to the data which has printed successfully.

Promos (Promotions)

Promotions allow special pricing specific to the promotion being offered. Promotions might be defined for discounts, specials, coupons, and combo meals; and might be seasonal or always available. Six predefined promotion types are offered: BOGO, Combo, Coupon, New Price, Check Reduction, Package Promo, and Quick Combo.

Punch

A punch refers to the clock in and out times of an employee, hence the term, 'punching the clock'.

Q**Quick Service**

Aloha Quick Service is an NCR premier product offering and is designed for fast food restaurant environments.

R**Receipt printer**

A receipt printer is a printer physically located in the customer area of a restaurant, and is used to print guest checks and credit card vouchers.

Redundancy

Redundancy architecture is designed to retain maximum system functionality in the event of common hardware failures. There are three types of failures: BOH file server down, master terminal down, and complete network failure (hub failure). Redundancy provides a system of fault tolerance that allows the restaurant to continue functioning regardless of the type of failure experienced.

Refresh

Refresh is a process which copies all system configuration files from the \NewData subdirectory of \Aloha to the \Data subdirectory of \Aloha. Changes made to the database are made within Maintenance (\NewData directory). The changes do not take effect on the FOH until a refresh occurs (FOH reads the files in the \Data directory).

Remote printer

A remote printer is a printer physically located in the bar or food preparation area of a restaurant, and is used to print kitchen chits.

Revenue center

Revenue centers are defined and used for reporting purposes. Typically, revenue centers correspond with the areas of the restaurant, such as: Dining Room, Bar, Patio, Cigar Lounge, Banquets, and Room Service (hotel).

S

Server banking

Server banking refers to a restaurant environment whereby the customers pay the server, rather than paying a cashier.

Serve Time

Indicates the time the guest expects to receive or pick up their order.

Servercapable

Servercapable is an Aloha POS environment variable which stipulates whether a terminal is capable of taking over as the file server in the event that the true file server is down or cannot be located by other terminals on the network.

SKU

Stock Keeping Unit

T

Table Service

Aloha Table Service is an NCR premier product offering and is designed for restaurant environments where customers are waited on by an actual server.

Tender

Valid types of payment that a restaurant accepts as payment for goods and services. These include cash, credit cards, house accounts, and so on.

Time Slice

A time slice indicates an employee's shift using the basic labor scheduler program within Aloha Manager. The left end represents the clock in time and the right end represents the clock out time for the shift.

Trans.log

The Trans.log (transaction log) is a file stored in the \Data subdirectory of \Aloha. It contains all activity and transactions for the current DOB. The log stores all FOH activity that occurs during the current DOB in this secure, proprietary encrypted format. New data is appended to the log. It is impossible to lose checks with this system, since every change to the system is reflected in the log. The log also provides a natural audit trail for monitoring potential misuse of the system by employees.

U**Unordered Items**

Unordered items are items that are entered but not 'sent to the kitchen'. The text displays as blue in the guest check window.

W**Winhook**

The Winhook feature is used to launch a custom batch file following the EOD process. Custom batch files allow the automation of certain routines that are outside the system but address Aloha data files, such as compressing, or zipping, data files and copying them to another drive.

Networking glossary

Symbols

10Base2

10 Mbps Baseband Ethernet specification using RG-58 thinnet 50-ohm thin coaxial cable with BNC T Connector. (Limit 185 meters.)

10Base5

10 Mbps Baseband Ethernet specification using Thicknet DIX/AUI 50-ohm Baseband coaxial cable. (Limit 500 meters.)

10BaseF

10 Mbps Baseband Ethernet specification for the 10BaseFB, 10BaseFL, and 10BaseFP standards for Ethernet over fiber-optic cabling.

10BaseFB

10 Mbps Baseband Ethernet specification using fiber optic cabling. Provides a synchronous signaling backbone that allows additional segments and repeaters to be connected to the network. (Limit 2000 meters.)

10BaseFL

10 Mbps Baseband Ethernet specification using fiber optic cabling. It is designed to replace the FOIRL specification. (Limit 2000 meters, 1000 meters w/FOIRL.)

10BaseFP

10 Mbps Fiber-passive Baseband Ethernet specification fiber optic cabling. Used to organize computers into a star topology without the use of repeaters. (Limit 500 meters.)

10BaseT

A variant of Ethernet which allows stations to be attached via twisted pair cable. 10 Mbps Baseband Category 3, 4, or 5 UTP cable RJ-45. One pair for transmitting data and the other for receiving data. (Limit 100 meters.)

10Broad36

10 Mbps Broadband Ethernet specification using Broadband coaxial cable. (Limit 3600 meters).

100BaseFX

100 Mbps Baseband Fast Ethernet specification using two strands of multimode fiber optic cabling per link. (Limit 400 meters).

100BaseT

100 Mbps Baseband Fast Ethernet specification using Category 5 UTP cable RJ-45 connectors. The 100BaseT link pulses, which are sent when there is no traffic, contain more information than those used in 10BaseT.

100BaseT4

100 Mbps Baseband Fast Ethernet specification using four pairs of Category 3, 4, or 5 UTP wiring. (Limit 100 meters).

100BaseTX

100 Mbps Baseband Fast Ethernet specification using two pairs of either UTP or STP wiring. The first pair is used to receive data; the second is used to transmit data. (Limit 100 meters).

100BaseX

100 Mbps Baseband Fast Ethernet specification for the 100BaseFX and 100BaseTX standards for Fast Ethernet over fiber optic cabling.

100VG-AnyLAN

100 Mbps Fast Ethernet and Token Ring media technology (developed by Hewlett-Packard). It uses four pairs of Category 3, 4 or 5 UTP cabling. This high speed technology can be made to operate on existing 10BaseT.

A

ANSI

American National Standards Institute. The United States government body responsible for approving US standards in many areas, including computers and communications. ANSI is a member of ISO. ANSI sells ANSI and ISO (international) standards.

APDU

Application Protocol Data. A packet of data exchanged between two application programs across a network. This is the highest level view of communication in the OSI seven layer model and a single packet exchanged at this level may actually be transmitted as several packets at a lower layer as well as having extra information headers) added for routing, and so on.

ARP

Address Resolution Protocol. A method for finding a host's Ethernet address from its Internet address. The sender broadcasts an ARP packet containing the Internet address of another host and waits for it (or some other host) to send back its Ethernet address. Each host maintains a cache of address translations to reduce delay and loading. ARP allows the Internet address to be independent of the Ethernet address but it only works if all hosts support it.

ATM

Asynchronous transfer mode – fixed packets – Broadband. Speeds up to 622 Kbps – used mainly for ISP backbones because of cost. 53 byte cells instead of packets. – Packet switching protocol. A method for the dynamic allocation of bandwidth using a fixed-size packet (called a cell).

ATS

Asynchronous Terminal Server

ALOHA

A system of contention resolution devised at The University of Hawaii. Packets are broadcast when ready, the sender listens to see if they collide and if so retransmits after a random time. Slotted ALOHA constrains packets to start at the beginning of a time slot. Basic ALOHA is appropriate to long propagation time nets (such as, satellite). For shorter propagation times, carrier sense protocols are possible.

Address mask

A bit mask used to identify which bits in an IP address correspond to the network address and subnet portions of the address. This mask is often referred to as the subnet mask because the network portion of the address can be determined by the class inherent in an IP address. The address mask has ones in positions corresponding to the network and subnet numbers and zeros in the host number positions.

Aloha

A Hawaiian greeting. Also the world's best POS software.

Analog

A description of a continuously variable signal or a circuit or device designed to handle such signals. The opposite is discrete or digital. Analog circuits are much harder to design and analyze than digital ones because the designer must take into account effects such as the gain, linearity and power handling of components, the resistance, capacitance and inductance of PCB tracks, wires and connectors, interference between signals, power supply stability and more.

A digital circuit design, especially for high switching speeds, must also take these factors into account if it is to work reliably, but they are usually less critical because most digital components will function correctly within a range of parameters whereas such variations will corrupt the outputs of an analog circuit.

Application Layer

The top layer of the OSI seven layer model. This layer handles issues like network transparency, resource allocation and problem partitioning. The application layer is concerned with the user's view of the network (such as formatting electronic mail messages). The presentation layer provides the application layer with a familiar local representation of data independent of the format used on the network.

Asynchronous Transmission

Transmission in which time intervals between transmitted characters may be of unequal length. Transmission is controlled by start and stop bits. Data stream passed in one direction. Most common.

Attenuation

The degrading of a signal as it travels farther from its origination.

B

BDC

Backup Domain Controller. A computer that receives a copy of the domain's security policy and database and authenticates network logins. (It provides a backup in case the PDC becomes unavailable. It is not required but is recommended to be a backup to the PDC.)

Bandwidth

The amount of data that can be sent through a given communications circuit per second.

Baseband

A transmission medium through which digital signals are sent without frequency shifting. In general, only one communication channel is available at any given time. Ethernet is an example of a baseband network.

Binary

1. Base two. A number representation consisting of zeros and ones used by practically all computers because of its ease of implementation using digital electronics and Boolean algebra.
2. Any file format for digital data encoded as a sequence of bits but not consisting of a sequence of printable characters (text). The term is often used for executable machine code. Of course all digital data, including characters, is actually binary data (unless it uses some (rare) system with more than two discrete levels) but the distinction between binary and text is well established.

Bit

(b) binary digit. The unit of information; the amount of information obtained by asking a yes-or-no question; a computational quantity that can take on one of two values, such as true and false or 0 and 1; the smallest unit of storage - sufficient to hold one bit. A bit is said to be set if its value is true or 1, and reset or clear if its value is false or 0. One speaks of setting and clearing bits. To toggle or invert a bit is to change it, either from 0 to 1 or from 1 to 0.

Bitwise

A bitwise operator treats its operands as a vector of bits rather than a single number. Boolean bitwise operators combine bit N of each operand using a Boolean function (NOT, AND, OR, XOR) to produce bit N of the result. For example, a bitwise AND operator (& in C) would evaluate 13 & 9 as (binary) 1101 & 1001 - 1001 - 9, whereas, the logical AND, (C &&) would evaluate 13 && 9 as TRUE && TRUE - TRUE - 1.

In some languages, such as Acorn's BASIC V, the same operators are used for both bitwise and logical operations. This usually works except when applying NOT to a value x which is neither 0 (false) nor -1 (true), in which case both x and (NOT x) will be nonzero and thus treated as TRUE. Other operations at the bit level, which are not normally described as 'bitwise,' include shift and rotate.

Boolean

The type of an expression with two possible values, true and false. Also, a variable of Boolean type or a function with Boolean arguments or result. The most common Boolean functions are AND, OR and NOT.

Bit mask

A pattern of binary values which is combined with some value using bitwise AND with the result that bits in the value in positions where the mask is zero are also set to zero.

Bridge

A device which forwards traffic between network segments based on data link layer information. These segments would have a common network layer address.

Broadband

A transmission medium capable of supporting a wide range of frequencies, typically from audio up to video frequencies. It can carry multiple signals by dividing the total capacity of the medium

into multiple, independent bandwidth channels, where each channel operates only on a specific range of frequencies.

Broadcast

A transmission to multiple, unspecified recipients. On Ethernet, a broadcast packet is a special type of multicast packet which all nodes on the network are always willing to receive.

Broadcast storm

A broadcast on a network that causes multiple hosts to respond by broadcasting themselves, causing the storm to grow exponentially in severity.

Bus Topology

Bus consists of a single linear cable called a trunk. Data is sent to all computers on the trunk. Computers listen and accept only messages addressed to them. Bus is a passive topology. Performance degrades as more computers are added to the bus. Signal bounce is eliminated by a terminator at each end of the bus. Barrel connectors can be used to lengthen cable. Repeaters can be used to regenerate signals.

Byte

A unit of information, often 1 character, made up of 8 bits.

C

CAT 1

Voice only

CAT 2

4 Mbps

CAT 3

10 Mbps

CAT 4

16 Mbps

CAT 5

100 Mbps

CRC

Cyclic Redundancy Check or Cyclic Redundancy Code. A number derived from, and stored or transmitted with, a block of data in order to detect corruption. By recalculating the CRC and comparing it to the value originally transmitted, the receiver can detect some types of transmission errors.

CSMA/CD

Carrier Sense Multiple Access / Collision Detect. The low level network arbitration protocol used on Ethernet. Nodes wait for quiet on the net before starting to transmit and listen while they are transmitting. If two nodes transmit at once the data gets corrupted. The nodes detect this and continue to transmit for a certain length of time to ensure that all nodes detect the collision. The transmitting nodes then wait for a random time before attempting to transmit again thus minimizing the chance of another collision. The ability to detect collision during transmission

reduces the amount of bandwidth wasted on collisions compared with simple Aloha broadcasting.

CSMA/CA

Collision Avoidance; Announces intention to send data (Apptalk).

CTS

Clear to Send

Checksum

A computed value that depends on the contents of a block of data and which is transmitted or stored along with the data in order to detect corruption of the data. The receiving system recomputes the checksum based upon the received data and compares this value with the one sent with the data. If the two values are the same, the receiver has some confidence that the data was received correctly. The checksum may be 8 bits (modulo 256 sum), 16, 32, or some other size. It is computed by summing the bytes or words of the data block ignoring overflow. The checksum may be negated so that the total of the data words plus the checksum is zero. Internet packets use a 32-bit checksum.

Circuit switching v

A communications paradigm in which a dedicated communication path is established between the sender and receiver along which all packets travel. The telephone system is an example of a circuit switched network. Also called connection-oriented. Contrast connectionless, packet switching.

Collision

When two hosts transmit on a network at once causing their packets to collide and corrupt each other.

Collision detection

A class of methods for sharing a data transmission medium in which hosts transmit as soon as they have data to send and then check to see whether their transmission has suffered a collision with another host's. If a collision is detected then the data must be resent. The resending algorithm should try to minimize the chance that two hosts' data will repeatedly collide. For example, the CSMA/CD protocol used on Ethernet specifies that they should then wait for a random time before retransmitting.

Combination Networks

Combines the features of both peer-to-peer and Server based networks, Users can share resources among themselves as well as access server-based resources.

Connection

The data communication method in which communication occurs between hosts with no previous setup. Packets sent between two hosts may take different routes. UDP is a connectionless protocol. Also called packet switching. Contrast circuit switching, connection-oriented.

Connection-oriented

(Or connection-based, stream-oriented). A type of transport layer data communication service that allows a host to send data in a continuous stream to another host. The transport service will

guarantee that all data will be delivered to the other end in the same order as sent and without duplication. Communication proceeds through three well-defined phases: connection establishment, data transfer, connection release. The most common example is Transmission Control Protocol (TCP).

Connectionless Protocol

The data communication method in which communication occurs between hosts with no previous setup. Packets sent between two hosts may take different routes. Also called packet switching. Contrast circuit switching, connection-oriented.

Constant mapping

Some TCP software constructs the destination Ethernet Address from the top 24 bits of the Ethernet address followed by the low 24 bits of the (class A) destination Internet address. For this scheme the top 24 bits of the Ethernet address must be the same on all hosts on the net. Contrast ARP.

Contention slot

(Or contention period). Minimum time a host must transmit for before it can be sure that no other host's packet has collided with its transmission. If the maximum propagation delay from one host to any other is T , then a host that starts to transmit at time t_0 may collide with a host that starts just before $t_0 + T$. The first host will not detect the collision until time $t_0 + 2T$.

Cross-over.

See Null Modem.

Cross-pinning.

See Null Modem.

Crosstalk

Signal overflow from one wire to another adjacent wire.

D

DB9

The standard 9-pin D-shell connector used for RS-232 serial communication.

DB25

The standard 25-pin D-shell connector used for RS-232 serial communication.

DCE

Data Communications Equipment

DHCP

Dynamic Host Configuration Protocol. A protocol that provides a means to dynamically allocate IP addresses to computers on a local area network. The system administrator assigns a range of IP addresses to DHCP and each client computer on the LAN has its TCP/IP software configured to request an IP address from the DHCP server. The request and grant process uses a lease concept with a controllable time period.

DNS

Domain Name Services - A general-purpose distributed, replicated, data query service chiefly used on Internet for translating hostnames into Internet addresses. Also, the style of hostname used on the Internet, though such a name is properly called a fully qualified domain name. DNS can be configured to use a sequence of name servers, based on the domains in the name being looked for, until a match is found.

DSR

Data Set Ready

DSU

Digital Service Unit

DTE

Data Terminal Equipment.

DTR

Data Terminal Ready

DVM

Digital VoltMeter) – Uses voltage, tests for continuity or short.

Datagram

A self-contained, independent entity of data carrying sufficient information to be routed from the source to the destination computer without reliance on earlier exchanges between this source and destination computer and the transporting network.

Data Link Layer

The third lowest layer in the OSI seven layer model. The network layer determines routing of packets of data from sender to receiver via the data link layer and is used by the transport layer. The most common network layer protocol is IP.

Deferral

Waiting for quiet on the Ethernet.

Digital

A description of data that is stored or transmitted as a sequence of discrete symbols from a finite set, most commonly this means binary data represented using electronic or electromagnetic signals. The opposite is analog.

Domain

On the Internet, 'domain' is most commonly used to refer to a group of computers whose hostnames share a common suffix, the domain name. The last component of this is the top-level domain.

Domain address

The name of a host on the Internet belonging to the hierarchy of Internet domains.

Dot notation

Berkeley UNIX notation for Internet addresses. An Internet address in dot notation consists of one to four numbers in hexadecimal (leading 0x), octal (leading 0) or decimal. It represents a 32-bit address. Each leading number represents eight bits of the address (high byte first) and the last number represents the rest. Such as address 0x25.32.0xab represents 0x252000ab. By far the most common form is four decimal numbers, such as 146.169.22.42. Many commands will accept an address in dot notation in place of a hostname.

Dynamic Router

Automatically track routes. Routers talk to routers and add them to the tables.

Dynamic Routing

Routing that adjusts automatically to network topology or traffic changes.

E

Ethernet

A local area network. IEEE 802.3, recognized as the industry standard. Data is broken into packets that are transmitted using the CSMA/CD algorithm until they arrive at the destination without colliding with any other. The first contention slot after a transmission is reserved for an acknowledge packet. A node is either transmitting or receiving at any instant. The bandwidth is about 10 Mbps.

Disk-Ethernet-Disk transfer rate with TCP/IP is typically 30 kilobyte per second. Version 2 specifies that collision detect of the transceiver must be activated during the inter-packet gap and that when transmission finishes the differential transmit lines are driven to 0V (half step). It also specifies some network management functions such as reporting collisions, retries and deferrals. Ethernet cables are classified as XbaseY, such as 10base5, where X is the data rate in Mbps, 'base' means baseband (as opposed to radio frequency) and Y is the category of cabling. The original cable was 10base5 (full-spec), others are 10Base2 (thinnet) and 10BaseT (twisted-pair) which is now very common. 100baseT (Fast Ethernet) is also increasingly common.

Ethernet Address

Or MAC address. The physical address identifying an individual Ethernet controller board. An Ethernet address is a 48-bit number aabbccddeeff where a-f are hexadecimal digits. The first 24 bits, aabbcc, identify the manufacturer of the controller. The Ethernet address is hard-wired on some controllers, stored in a ROM on some, and others allow it to be changed from software. It is usually written as six hexadecimal numbers, such as 08:00:20:03:72:DC.

F

FDDI

Fiber Distributed Data Interface. 100Mbps Used mainly for MAN technology - works in a double ring. Like Token-Ring, only many frames can go on the token, not just one.

FQDN

Fully Qualified Domain Name. The full name of a system, consisting of its local hostname and its domain name. For example, 'venera' is a hostname and 'venera.isi.edu' is Fully Qualified Domain Name. An FQDN should be sufficient to determine a unique Internet address for any host on the Internet.

The same naming scheme is also used for some hosts which are not on the Internet, but share the same name-space for electronic mail addressing. A host that does not have a FQDN (which is not 'domainist') must be addressed using a bang path. All Internet computers and most UUCP sites can now resolve FQDNs, thanks to a large amount of behind-the-scenes magic and PD software written since 1980 or so.

Fast Ethernet

A version of Ethernet developed in the 1990s that can carry 100 Mbps compared with standard Ethernet 10 Mbps. It requires upgraded network cards and hubs. The relevant standards are 100baseT, 100BaseFX and 100BaseVG.

Fiber Optic Cable

Cable constructed of pure glass using light beams to transmit large amounts of data. Resistant to interference. Speeds of between 100Mbps - 200,000Mbps.

File server

Hardware and software that together provide file-handling and storage functions for multiple users on a local area network. Storing files on a file server saves having multiple copies stored on individual computers, thus economizing on disk space and also makes administrating and updating the files easier.

Flow control

The collection of techniques used in serial communications to stop the sender sending data until the receiver can accept it. This may be either software flow control or hardware flow control. The receiver typically has a fixed size buffer into which received data is written as soon as it is received. When the amount of buffered data exceeds a 'high water mark,' the receiver will signal to the transmitter to stop transmitting until the process reading the data has read sufficient data from the buffer that it has reached its 'low water mark,' at which point the receiver signals to the transmitter to resume transmission.

Fragment

A piece of a packet. When a router is forwarding an IP packet to a network that has a maximum packet size smaller than the packet size, it is forced to break up that packet into multiple fragments. These fragments will be reassembled by the IP layer at the destination host.

Fragmentation

The IP process in which a packet is broken into smaller pieces, fragments, to fit the requirements of a physical network over which the packet must pass. The inverse is reassembly.

Frame Relay

Point-to-point system. Uses PVC; fast-packet, variable-length digital; digital leased lines. Provides bandwidth as needed. Packet-switching protocol.

G

Gateway

Works at all layers. Gateways change format of the data to make it conform to the application program at the receiving end. Strips packet and rebuilds with new protocol info, that is, PC connectivity to mainframe. Gateway strips PC packet and rebuilds it in mainframe form. Proxy server is gateway to the Internet.

H

Hexadecimal

Or 'hex.' Base 16. A number representation using the digits 0-9, with their usual meaning, plus the letters A-F (or a-f) to represent hexadecimal digits with values of (decimal) 10 to 15. The right-most digit counts ones, the next counts multiples of 16, then $16^2 = 256$, and so on.

Hop

One direct host-to-host connection forming part of the route between two hosts in a routed network such as the Internet. Some protocols place an upper limit on the hop count in order to detect routing loops.

Host

A computer connected to a network. The term node includes devices such as routers and printers which would not normally be called hosts.

Host number

The host part of an Internet address. The rest is the network number.

Hostname

The unique name by which a computer is known on a network, used to identify it in electronic mail, Usenet news, or other forms of electronic information interchange.

HOSTS

File that contains mappings between DNS host names and their IP addresses.

I

IEEE

Institute of Electrical and Electronic Engineers. The world's largest technical professional society, based in the USA. Founded in 1884 by a handful of practitioners of the new electrical engineering discipline, today's Institute has more than 320,000 members who participate in its activities in 147 countries.

The IEEE sponsors technical conferences, symposia and local meetings worldwide, publishes nearly 25% of the world's technical papers in electrical, electronics and computer engineering and computer science, provides educational programs for its members and promotes standardization. Areas covered include aerospace, computers and communications, biomedical technology, electric power and consumer electronics. To learn more go to:
<http://grouper.ieee.org/groups/802/802info.html>.

IP

Internet Protocol. The network layer for the TCP/IP protocol suite widely used on Ethernet networks, defined in STD 5, RFC 791. IP is a connectionless, best-effort packet switching protocol. It provides packet routing, fragmentation and reassembly through the data link layer.

IP address

See Internet Address.

IPX/SPX

Novell. Similar to NetBEUI, only routable.

IRQ

Interrupt Request. The following is a list of common IRQ settings:

- 2 (9) EGA/VGA
- 3 Available (or COM2,COM4)
- 4 COM 1, COM 3
- 5 Available (unless LPT2 or sound card)
- 6 Floppy Disk Controller
- 7 Parallel port (LPT1)
- 8 Real-time clock
- 10 Available
- 11 Available
- 12 Mouse (PS/2)
- 13 Math Coprocessor
- 14 Hard-disk controller
- 15 Available

ISDN

Integrated services digital network; 128 bits per second - 2B+D - 2 64Kbps B channels & 1 16Kbps D channel. Voice, data, images; signaling and link management.

ISO

A voluntary, nontreaty organization founded in 1946, responsible for creating international standards in many areas, including computers and communications. ISO produced the OSI seven-layer model for network architecture. Its members are the national standards organizations of 89 countries, including the American National Standards Institute. The term ISO is not actually an acronym for anything. It is a pun on the Greek prefix iso-, meaning 'same.' Some ISO documents say ISO is not an acronym even though it is an anagram of the initials of the organization's name.

Internet address

IP address, TCP/IP address. The 32-bit host address defined by the Internet Protocol in STD 5, RFC 791. It is usually represented in dotted decimal notation. A host's Internet address is sometimes related to its Ethernet address. The Internet address is usually expressed in dot notation, such as 128.121.4.5. The address can be split into a network number (or network address) and a host number unique to each host on the network and sometimes also a subnet address. The way the address is split depends on its class, A, B or C as determined by the high address bits:

Class A - high bit 0, 7-bit network number, 24-bit host number n1.a.a.a 0 <- n1 <- 127

Class B - high 2 bits 10, 14-bit network number, 16-bit host number n1.n2.a.a 128 <- n1 <- 191

Class C - high 3 bits 110, 21-bit network number, 8-bit host number n1.n2.n3.a 192 <- n1 <- 223

The Internet address must be translated into an Ethernet address by either ARP or constant mapping. The term is sometimes used incorrectly to refer to a host's fully qualified domain name.

Internetworking

The interconnection of two or more networks, usually local area networks so that data can pass between hosts on the different networks as though they were one network. This requires some kind of router or gateway.

Inter-packet gap

A time delay between successive data packets mandated by the network standard for protocol reasons. In Ethernet, the medium has to be 'silent' (that is, no data transfer) for a few microseconds before a node can consider the network idle and start to transmit. This is necessary for fairness reasons. The delay time, which approximately equals the signal propagation time on the cable, allows the "silence" to reach the far end so that all nodes consider the net idle.

J

Jitter

Instability in a signal wave; caused by signal interference or an unbalanced FDDI ring or Token Ring.

L

LAN

Local Area Network. A data communications network which is geographically limited (typically to a 1 km radius) allowing easy interconnection of computers within adjacent buildings. Ethernet and FDDI are examples of standard LANs. Because the network is known to cover only a small area, optimizations can be made in the network signal protocols that permit data rates up to 100 Mbps.

Lana

The NetBIOS LANA (LAN Adapter) number identifies the transport driver, network interface card (NIC) driver, and adapter that will be used to send and receive NetBIOS packets. Each transport driver (protocol), network interface card driver, and adapter will use a different lana number.

LLC

Logical Link Control. The lower sublayer of the data link layer. The interface between a node's Logical Link Control and the network's physical layer. The MAC differs for various physical media.

LMHOSTS

File that contains mappings between NetBIOS computer names and their IP addresses.

Latency

1. The time it takes for a packet to cross a network connection, from sender to receiver. 2. The period of time that a frame is held by a network device before it is forwarded. Two of the most important parameters of a communications channel are its latency and its bandwidth.

M

MAC

The lower sublayer of the data link layer. The interface between a node's Logical Link Control and the network's physical layer. The MAC differs for various physical media.

MAN

Metropolitan Area Network. A data network intended to serve an area the size of a large city. Such networks are being implemented by innovative techniques, such as running optical fiber through subway tunnels.

Mbps

Megabits per second. Millions of bits per second. A unit of information transfer rate. For example, Ethernet can carry 10 Mbps.

Mesh

Commonly used in WAN configurations. Routers are connected to multiple links for redundancy and to give the ability to determine the quickest route to a destination.

Mnemonic

A shortened version of a command word, such as TXD for Transmit Data.

Multiplexer

Mux. Combines several separate data channels for transmission over a single line.

N

NDIS

Used to bind multiple protocols to a network adapter.

NIC

Network Interface Card. An adapter circuit board installed in a computer to provide a physical connection to a network.

NRZ

Non-Return to Zero

NWLINK

Microsoft version of IPX/SPX.

NetBEUI

NetBIOS Extended User Interface. The network transport protocol used by all of Microsoft's network systems and IBM's LAN Server based systems. NetBEUI is often confused with NetBIOS. NetBIOS is the applications programming interface and NetBEUI is the transport protocol.

NetBIOS

An application programming interface (API) which activates network operations on IBM PC compatibles running under MS-DOS. It is a set of network commands that the application program issues in order to transmit and receive data to another host on the network. The commands are interpreted by a network control program or network operating system that is NetBIOS compatible.

Name resolution

The process of mapping a name to its corresponding address. The Domain Name System is the system that does name resolution on the Internet.

Netmask

A 32-bit mask which shows how an Internet address is to be divided into network, subnet and host parts. The netmask has 1s in the bit positions in the 32-bit address which are to be used for the network and subnet parts, and zeros for the host part. The mask should contain at least the standard network portion (as determined by the address's class), and the subnet field should be contiguous with the network portion.

Network

Hardware and software data communication systems. The OSI seven layer model attempts to provide a way of partitioning any computer network into independent modules from the lowest (physical) layer to the highest (application) layer. Many different specifications exist at each of these layers. Networks are often also classified according to their geographical extent: local area network (LAN), metropolitan area network (MAN), wide area network (WAN) and also according to the protocols used.

Network Address

The network portion of an IP address. For a class A network, the network address is the first byte of the IP address. For a class B network, the network address is the first two bytes of the IP address. For a class C network, the network address is the first three bytes of the IP address. In each case, the remainder is the host address. In the Internet, assigned network addresses are globally unique.

Network card

See NIC.

Network Layer

The third lowest layer in the OSI seven layer model. The network layer determines routing of packets of data from sender to receiver via the data link layer and is used by the transport layer. The most common network layer protocol is IP.

Network Transparency

A feature of an operating system or other service which lets the user access a remote resource through a network without having to know if the resource is remote or local.

Node

An addressable device attached to a computer network. More often called a host.

Null Modem

A cable, especially an RS-232 cable, for connecting serial ports on two computers directly, rather than via modems. Since, according to the specification, both computers should transmit on pin three of their RS-232 connectors and receive on pin two, a null modem cable needs to connect one computer's pin two to the other's pin three and vice versa. It also needs to have male connectors at both ends (again, according to the specification).

O

OSI

Open Systems Interconnection model. A model of network architecture and a suite of protocols (a protocol stack) to implement it, developed by ISO in 1978 as a framework for international standards in heterogeneous computer network architecture. The OSI architecture is split between

seven layers, from lowest to highest: 1 physical layer, 2 data link layer, 3 network layer, 4 transport layer, 5 session layer, 6 presentation layer, 7 application layer.

OSPF

Open shortest path first (routing algorithm)

Optical fiber

A plastic or glass (silicon dioxide) fiber no thicker than a human hair used to transmit information using infrared or even visible light as the carrier (usually a laser). The light beam is an electromagnetic signal with a frequency in the range of 10^{14} to 10^{15} Hertz. Optical fiber is less susceptible to external noise than other transmission media, and is cheaper to make than copper wire, but it is much more difficult to connect. Optical fibers are difficult to tamper with (to monitor or inject data in the middle of a connection), making them appropriate for secure communications. The light beams do not escape from the medium because the material used provides total internal reflection.

AT&T Bell Laboratories in the United States managed to send information at a rate of 420 Mbps, over 161.5 km through an optical fiber cable. In Japan, 445.Mbps was achieved over a shorter distance. At this rate, the entire text of the Encyclopedia Britannica could be transmitted in one second. Currently, AT&T is working on a world network to support high volume data transmission, international computer networking, electronic mail and voice communications. (A single fiber can transmit 200 million telephone conversations simultaneously.)

P

PCMCIA

Personal Computer Memory Card International Association

PDC

Primary Domain Controller. Logins, permissions, scripts, securities.

PVC

Permanent virtual circuit

Packet

The unit of data sent across a network. Packet is a generic term used to describe a unit of data at any layer of the OSI protocol stack, but it is most correctly used to describe application layer data units

Packet Switching

A communications paradigm in which packets (messages or fragments of messages) are individually routed between nodes, with no previously established communication path. Packets are routed to their destination through the most expedient route (as determined by some routing algorithm). Not all packets travelling between the same two hosts, even those from a single message, will necessarily follow the same route. The destination computer reassembles the packets into their appropriate sequence. Packet switching is used to optimize the use of the bandwidth available in a network and to minimize the latency.

Peer

A unit of communications hardware or software that is on the same protocol layer of a network as another. A common way of viewing a communications link is as two protocol stacks, which are

actually connected only at the very lowest (physical) layer, but can be regarded as being connected at each higher layer by virtue of the services provided by the lower layers. Peer-to-peer communication refers to these real or virtual connections between corresponding systems in each layer.

Peer-to-Peer Networks

No dedicated server or hierarchy, also called a workgroup. Usually ten or fewer workstations. Users act as their own administrator and security. Computers are in same general area. Limited growth.

Parallel

Transmission mode that sends a number of bits concurrently over separate wires.

Path

The list of directories the command interpreter searches for executables. It is stored as part of the environment in the operating system.

Physical addressing

The low level addressing scheme used on Ethernet. The 48-bit destination Ethernet address in a packet is compared with the receiving node's Ethernet address.

Physical Layer

The lowest layer in the OSI seven layer model. It concerns electrical and mechanical connections and MAC. It is used by the data link layer. Example physical layer protocols are CSMA/CD, token ring and bus.

Presentation Layer

The second highest layer (layer 6) in the OSI seven layer model. Performs functions such as text compression, code or format conversion to try to smooth out differences between hosts. Allows incompatible processes in the application layer to communicate via the session layer.

Protocol

A set of formal rules describing how to transmit data, especially across a network. Low level protocols define the electrical and physical standards to be observed, bit- and byte-ordering and the transmission and error detection and correction of the bit stream. High level protocols deal with the data formatting, including the syntax of messages, the terminal to computer dialogue, character sets, sequencing of messages and so on.

Protocol stack

A layered set of protocols which work together to provide a set of network functions. Each intermediate protocol layer uses the layer below it to provide a service to the layer above. The OSI seven layer model is an attempt to provide a standard framework within which to describe protocol stacks.

Protocol Layer

The software and/or hardware environment of two or more communications devices or computers in which a particular network protocol operates. A network connection may be thought of as a set of more or less independent protocols, each in a different layer or level. The lowest layer governs direct host-to-host communication between the hardware at different hosts; the

highest consists of user application programs. Each layer uses the layer beneath it and provides a service for the layer above.

Each networking component hardware or software on one host uses protocol appropriate to its layer to communicate with the corresponding component (its peer) on another host. Such layered protocols are sometimes known as peer-to-peer protocols. The advantages of layered protocols is that the methods of passing information from one layer to another are specified clearly as part of the protocol suite, and changes within a protocol layer are prevented from affecting the other layers. This greatly simplifies the task of designing and maintaining communication systems. Examples of layered protocols are TCP/IP's five layer protocol stack and the OSI seven layer model.

Protocol Analyzer

Sniffer. Monitors and logs network activities and provides guidelines for optimizing.

R

RD

Receive Data

RI

Ring Indicator

RIP

Routing information protocol. Uses distance-vector algorithms to determine routes.

RJ11

Modular Telephone Jack Standard-11. A six conductor modular jack that is typically wired for four conductors. One line with the two center, red and green, conductors being tip and ring.

RJ14

Modular Telephone Jack Standard-14. Consists of two phone lines. One of the lines is the RJ11 line (the red and green conductors in the center). The second line is the second set of conductors, black and yellow, on the outside.

RJ45

Modular Telephone Jack Standard-45. The eight-pin connector used for data transmission over standard telephone wire.

RJ48C

Modular telephone Jack Standard-48C. An eight-position keyed plug with four wires, two for transmit, two for receive. Commonly used in T1 transmission.

RS232

EIA Recommended Standard-232. Standards specifying electrical and mechanical characteristics for interfaces between computer devices.

RS449

EIA DB37 and DB9 interlace for DTE and DCE data interchange.

RTS

Request to Send

Reassembly

Joining back together a previously fragmented IP packet before it is passed to the transport layer. See also Fragmentation.

Redirector

All Microsoft products come with a redirector that takes a request from the computer and looks to see if it is local or sends to network.

Registry

A central database, where all hardware details, software settings and user preferences are stored.

Reliable communication

Communication where messages are guaranteed to reach their destination complete and uncorrupted and in the order they were sent. This reliability can be built on top of an unreliable protocol by adding sequencing information and some kind of checksum or cyclic redundancy check to each message or packet. If the communication fails, the sender will be notified. Transmission Control Protocol is a reliable protocol used on Ethernet.

Repeater

A part of an Ethernet or other network, on which all message traffic is common to all nodes, that is, it is broadcast from one node on the segment and received by all others. This is normally because the segment is a single continuous conductor, though it may include repeaters. Since all nodes share the physical medium, collision detection or some other protocol is required to determine whether a message was transmitted without interference from other nodes. The receiving node inspects the destination address of a packet to tell if it was (one of) the intended recipient(s). Communication between nodes on different segments is via one or more routers.

Ring Topology

Computers are connected on a single circle of cable. Each computer acts as a repeater. Failure of one computer can affect the entire network. Token passing is used in Token Ring networks. The token is passed from one computer to the next, only the computer with the token can transmit. The receiving computer strips the data from the token and sends the token back to the sending computer with an acknowledgment. After verification, the token is regenerated.

Router

A device which forwards packets between networks. The forwarding decision is based on network layer information and routing tables, often constructed by routing protocols.

Routing

The process, performed by a router, of selecting the correct interface and next hop for a packet being forwarded.

S

SMDS

Switched multi-megabit data service. Up to 34 Mbps. Same fixed-length, cell-relay technology as ATM.

SONET

Synchronous Optical Network. Fiber-optic cabling. 1 Gig per second.

SQL

Structured Query Language. Used by most databases to manipulate data.

STP

Shielded Twisted Pair. Twisted pair wiring, carries signal 100 meters. Has foil or braided jacket around wiring to help reduce crosstalk and to prevent electromagnetic interference.

SVC

Switched virtual circuit

Segment

A part of an Ethernet or other network, on which all message traffic is common to all nodes, that is, it is broadcast from one node on the segment and received by all others. This is normally because the segment is a single continuous conductor, though it may include repeaters. Since all nodes share the physical medium, collision detection or some other protocol is required to determine whether a message was transmitted without interference from other nodes. The receiving node inspects the destination address of a packet to tell if it was (one of) the intended recipient(s). Communication between nodes on different segments is via one or more routers.

Serial (Port)

A connector on a computer to which you can attach a serial line connected to peripherals which communicate using a serial (bit-stream) protocol. The most common type of serial port is a 25-pin D-type connector carrying RS-232 signals. Smaller connectors (e.g. 9-pin D-type) carrying a subset of RS-232 are often used on personal computers. The serial port is usually connected to an integrated circuit called a UART which handles the conversion between serial and parallel data.

Server

A computer that provides some service for other computers connected to it via a network.

Server Based Networks

Ten or more users. Employs specialized servers. File and Print, Application, Mail, Fax, Communications (gateways), Central administration, Greater security, Centralized backup, Data Redundancy. Supports many users.

Session

A lasting connection between a user (or user agent) and a peer, typically a server, usually involving the exchange of many packets between the user's computer and the server. A session is typically implemented as a layer in a network protocol (such as Telnet or FTP).

Session Layer

The third highest protocol layer (layer 5) in the OSI seven-layer model. The session layer uses the transport layer to establish a connection between processes on different hosts. It handles security and creation of the session. It is used by the presentation layer.

Share-level security

Used in Microsoft® Windows® 95 to share resources. A password is needed to access the resource.

Sniffer

A network monitoring tool that can capture data packets and decode them to show protocol data.

Star Bus Topology

Several star topologies linked with a linear bus.

Star Ring Topology

Star hubs are connected using ring topology as opposed to a linear bus or a central hub.

Star Topology

Computers are connected by cable segments to a centralized hub. Signal travels through the hub to all other computers. Requires more cable. If hub goes down, entire network goes down. If a computer goes down, the network functions normally.

Static Router

Administrator manually sets up and configures routing table.

Subnet

A portion of a network, which may be a physically independent network segment, that shares a network address with other portions of the network and is distinguished by a subnet number. A subnet is to a network what a network is to an internet.

Subnet Address

The subnet portion of an IP address. In a subnetted network, the host portion of an IP address is split into a subnet portion and a host portion using an address mask (the subnet mask).

Subnet mask

See Address Mask.

Synchronous Transmission

Transmission in which data bits are sent at a fixed rate, with transmitter and receiver synchronized. Data going in both directions; expensive.

T

T1

1.544 Mbps. Point-to-point, full-duplex transmission. Voice, data and video.

T3

45 Mbps. Point-to-point, full-duplex transmission. Voice, data and video.

TCP

Transmission Control Protocol. The most common transport layer protocol used on Ethernet and the Internet. It was developed by DARPA. TCP is built on top of Internet Protocol (IP) and is nearly always seen in the combination TCP/IP (TCP over IP). It adds reliable communication,

flow-control, multiplexing and connection-oriented communication. It provides full-duplex, process-to-process connections.

TCP/IP

Transmission Control Protocol/Internet Protocol. The de facto standard Ethernet protocols incorporated into 4.2BSD UNIX. TCP/IP was developed by DARPA for internetworking and encompasses both network layer and transport layer protocols. While TCP and IP specify two protocols at specific protocol layers, TCP/IP is often used to refer to the entire DoD protocol suite based upon these, including Telnet, FTP, UDP and RDP.

TD

Transmit Data

TDR

Time Domain Reflectometer. Sends pulses down cable. Looks for shorts or opens. Can give you area of problem.

TERMSTR

Pronounced "term-stir". An environment setting used to override the default naming convention for terminals that must be used on all Aloha terminals and file servers. For example, if TERMSTR is set to TERM, then terminals must be named TERM1, TERM2, etc. Etymology: derived from old Cuban slang term for a traumatized hamster.

Thinnet

10Base2. 185 meters (607 feet); 10 Mbps; BNC Connector (barrel connector, terminator); RG58 cable. 5-4-3 rule (5 segments with 4 repeaters but only 3 segments can have computers.)

Thicknet

Also known as Standard Ethernet (10base5). 500 meters (1640 feet); 10 Mbps; AUI (attachment unit interface) connector, transceivers, transceiver cables (connect to thin).

Top-level domain

The last and most significant component of an Internet fully qualified domain name, the part after the last '.' ' ' . ". For example, host wombat.doc.ic.ac.uk is in top-level domain uk (for United Kingdom).

Topology

Refers to the configuration of the physical media of a network.

Transport Layer

Host-host layer. The middle layer in the OSI seven-layer model. The transport layer determines how to use the network layer to provide a virtual error-free, point to point connection so that host A can send messages to host B and they will arrive uncorrupted and in the correct order. It establishes and dissolves connections between hosts. It is used by the session layer. An example transport layer protocol is Transmission Control Protocol (TCP).

Transport Protocol

Ensures error-free transmission.

Twisted Pair

Standard phone line made up of two insulated copper wires wrapped around each other. The twists minimize interference and attenuation.

U

UNC

Uniform (or Universal) Naming Convention. Used in IBM PC networking to completely specify a directory on a file server. The basic format is: \\servername\sharename, where servername is the hostname of a network file server, and sharename is the name of a networked or shared directory. Note this is not the same as the conventional MS-DOS C:\WINDOWS directory name, such as: \\server1\dave, which might be set up to point to: C:\users\homedirs\dave on a server called server1. It is possible to execute a program using this convention without having to specifically link a drive, by running: \\server\share\directory\program.exe The undocumented MS-DOS command, TRUENAME can be used to find out the UNC name of a file or directory on a network drive.

UPS

Uninterruptible Power Supply. Power supply to run a computer for a short time in case of power loss.

UTP

Unshielded Twisted Pair. At least two pairs of insulated twisted pair and wrapped in an outer cover.

User-level security

Used in Windows NT® to share resources. When you attempt to access a shared resource, the server will make sure your user account has been authorized to access the resource.

V

Virtual Circuits

Logical connections between sending and receiving computers.

W

WAN

Wide Area Network. At least two LANs or MANs connected over a great distance, sometimes even intercontinentally.

WINS

Windows Internet Naming Service. Used to resolve a NetBIOS computer name to an IP address. WINS supports network client and server computers running Windows and can provide name resolution for other computers with special arrangements.

Workgroup

A group of users in a multi-user environment who share data.

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