

Feature Focus Guide: Interactive Messages

Core Product: Aloha Quick Service, Aloha Table Service
Last Updated: June 13, 2024

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Revision Record

Date	Version #	Description
Prior to 12/15/2022	v6.5+	Implemented the Interactive Messages feature.
	v17.1	Updated document to reflect Aloha Configuration Center and Aloha Manager.
12/15/2022		Converted the document to use new templates.
01/12/2023		Updated front cover and back page to reflect new NCR branding.
06/13/2024		Updated document to reflect NCR Voyix branding.

About Interactive Messages

Interactive Messages at a Glance	
Core Product	Aloha® Quick Service, Aloha Table Service
Complementary Products	No
Separate License Required?	No
Other References	Aloha Quick Service Manager Guide, Aloha Quick Service Reference Guide, Aloha Table Service Manager Guide, Aloha Table Service Reference Guide

The Interactive Messages feature provides a tool for managers to communicate with an employee, or a group of employees, via the Aloha Point-of-Sale (POS) system without any face-to-face contact. A message can appear when an employee clocks in or clocks out, depending on your need. We recommend you word the message in the form of a question where the employee can respond in a 'yes' or 'no' fashion. A 'yes' response would not require immediate attention; however, a 'no' response alerts a manager via a notification chit or requires manager approval to continue. You can also enter text in foreign languages directed to non- English speaking employees. The following are examples of how you might use an interactive message:

- A daily message assigned to all tipped employees in strict labor jurisdictions regarding employee breaks, such as "I declare under penalty of perjury that today I have received my allotment of breaks."
- A one-time message assigned to a specific employee regarding a schedule change, such as "Mary called in sick and I need you to close tonight. If you cannot, please click No."
- A one-time message assigned to the kitchen staff regarding chef jackets, such as "Have you received your chef jacket yet?"
- A daily message assigned to the support staff regarding tipshare, such as "Have you received your tipout from last night?"
- A one-time message assigned to all employees regarding the company picnic, such as "Can you attend the company picnic?"

Additionally, driven by recent legislature, restaurants need the ability to capture information from the employee at the time they return from a meal period in order to demonstrate that they are voluntarily choosing to return early. Also, if the employee returns early, restaurants would like the opportunity to discuss or validate the early return for the employee, which can be accomplished by requiring a manager approval at the point the employee returns from break. We have enhanced the existing

break rule functionality to include additional settings within the break rules function to select customized messages and manager required for yes or no response.



Reference

Refer to the [Employee Breaks Feature Focus Guide - HKS315](#) for detailed information regarding interactive messages, employee breaks, and early returns from enforced breaks.

Configuring Interactive Messages

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

Interactive Messages Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	Select Maintenance > Labor > Security Roles to provide access to the interactive messages feature. See page 6 .
2.	Select Maintenance > Labor > Pos Access Levels to allow employee access to approve message responses. See page 8 .
3.	Select Maintenance > Labor > Labor Groups to assign an interactive message to multiple job codes. See page 9 .
4.	Select Maintenance > Messaging > Interactive Messages to create an interactive message. See page 10 .
5.	Select Maintenance > Messaging > Interactive Messages to delete an interactive message. See page 12 .
6.	Select Utilities > Refresh POS & All Products to refresh the data. See page 12 .

Providing access to interactive messages

To use the Interactive Messages feature, you must have a sufficient security level to access the Interactive Messages feature. If your security role does not include access to Interactive Message Response, the option does not appear when you log in to the Back-of-House (BOH).

To provide access to the interactive messages feature:

1. Select **Maintenance > Labor > Security Roles**.
2. Select a **security role** from the drop-down list.

3. Select the **POS** tab.

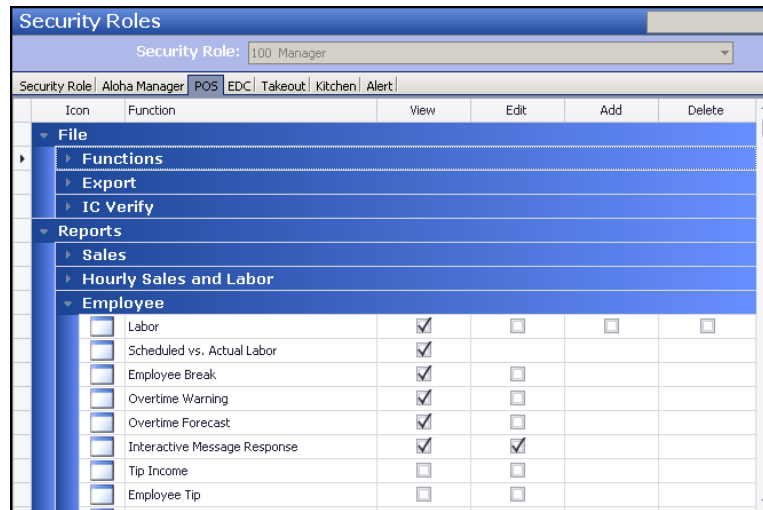


Figure 1 Security Roles

4. Under the 'Reports > Employee' group bar, select **View** and **Edit** for Interactive Message Response, where applicable.
5. Click **Save**.
6. Repeat this **procedure** for any other security roles requiring access to break rules.
7. Exit the **Security Roles** function.

Allowing employee access to approve message responses

You can configure interactive messages to require manager approval of a 'No' response when an employee clocks in, clocks out, or returns early from an enforced break. Approval of this function is controlled by the access level under which the employee clocks in.

To allow employees access to approve message responses:

1. Select **Maintenance > Labor > Pos Access Levels**.
2. Select the **access level**, such as a manager, from the drop-down list.

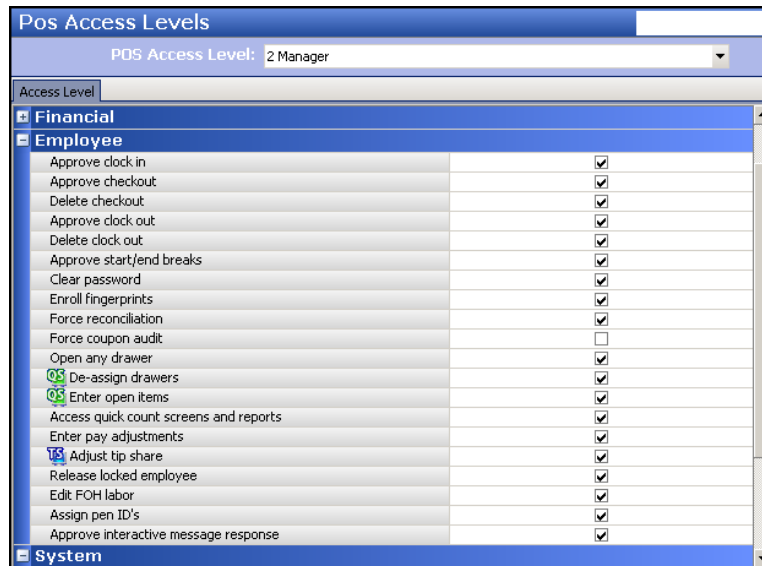


Figure 2 Pos Access Levels

3. Under the 'Employee' group bar, select **Approve interactive message response** to enable all employees using this access level to approve interactive message that require manager approval to continue with a clock in, clock out, or early return from enforced break function.
4. Click **Save**.
5. Repeat this **procedure** for each access level allowed to approve an interactive message response.
6. Exit the **Pos Access Levels** function.

Creating a labor reporting group

In the Labor Group function, you can group multiple job codes together for either labor reporting or for job code groupings. Labor groups designed for reporting appear on reports to determine your labor hours and dollars, and labor groups designed for job code groupings are used for logical assignments for other functions, such as interactive messages. In the Interactive Messages function, you can use either type of labor group; however, you may want to create and use labor groups designed for job code groupings so these groups do not clutter reports and cause confusion.

When you create an interactive message, the system offers the capability to assign the message to multiple job codes. This is helpful when you have a message that must be dispersed amongst a large number of staff.

To group job codes to assign message to multiple job codes:

1. Select **Maintenance > Labor > Labor Groups**.
2. Click the **New** drop-down arrow, select **Labor Reporting**, and click **OK**.
3. Type a **name** to identify the group job codes.
4. Select the **Jobcodes** tab.

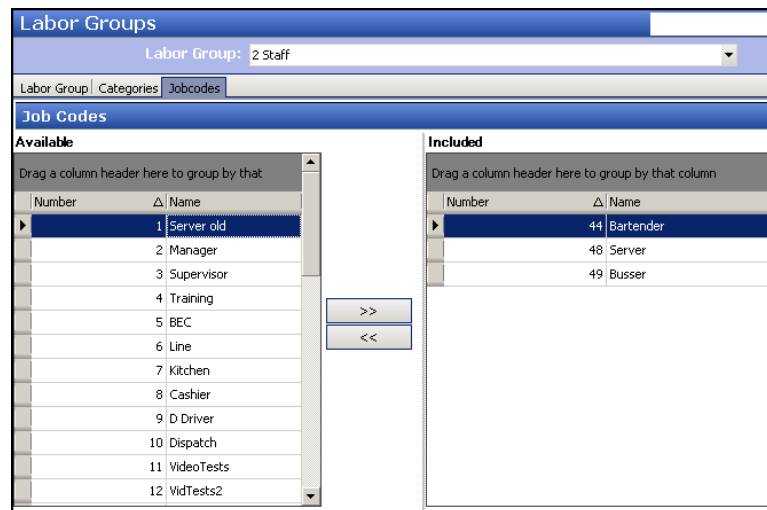


Figure 3 Labor Groups

5. Select the **job code** from the 'Available' list and click **>>** to move it to the 'Included' list.
6. Repeat **step 5** until you select all job codes for this labor group.
7. Click **Save**.
8. Repeat this **procedure** for any other labor groups you want to create.
9. Exit the **Labor Groups** function.

Creating an interactive message

Use the Interactive Messages function to create the message to send to your employees. You can configure the message to appear when the employee clocks in, clocks out, or returns early from an enforced break, depending upon your need. We recommend you word the message in the form of a question where the employee can respond in a 'yes' or 'no' fashion, with a 'no' response requiring immediate attention or feedback. You can also enter text in a foreign language directed to non-English speaking employees.

To create an interactive message:

1. Select **Maintenance > Messaging > Interactive Messages**.
2. Click the **New** drop-down arrow, select either **Clock In**, **Clock Out**, or **Early Return from Enforced Break**, and click **OK**.
3. Accept the **system assigned number** or click the **ellipsis (...)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.

Figure 4 Interactive Messages

4. Type a **name** to identify the interactive message.
5. Select a **labor group** from the drop-down list, if you wish to send the interactive message to a lot of employees, such as the entire kitchen staff.
6. Select either **No**, **Yes**, or **Yes or No** to require manager approval before the employee can continue with the clock in or clock out process.
7. Type the **text** of the message to appear in line 1 through line 15.

- If your message is directed to only one employee, select the **Employees** tab.

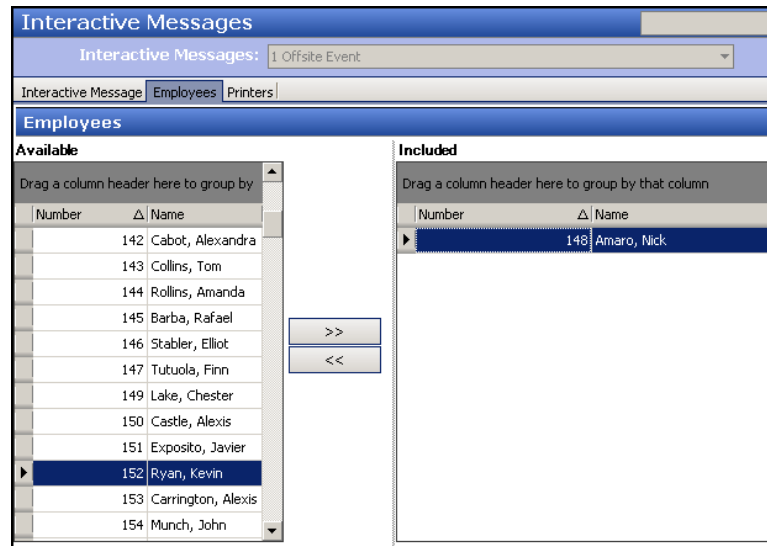


Figure 5 Employees Tab

- Select an **employee** from the 'Available' list and click **>>** to move the employee to the 'Included' list.
- Select the **Printers** tab.

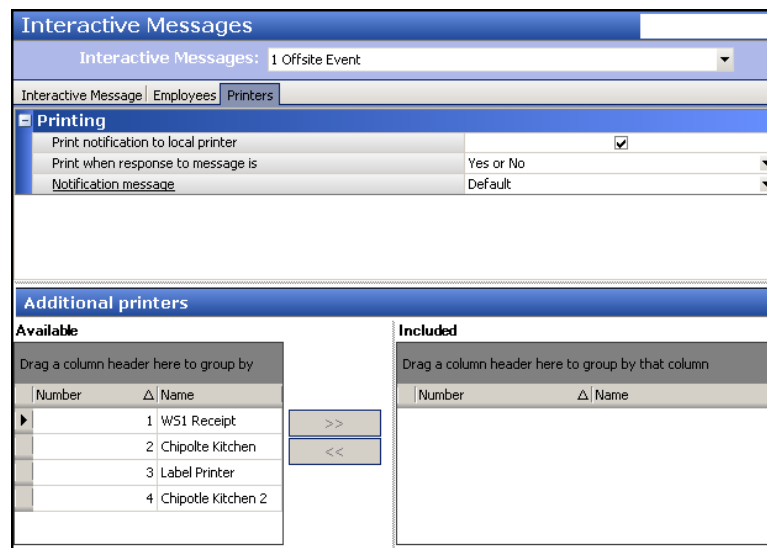


Figure 6 Printers Tab

- Select **Print notification to local printer** to print a notification message for the response.
- Select **No**, **Yes**, or **Yes or No** to designate the required response from the employee for the message to print.

13. Select the **Notification message** to specify the content to print in the message.
14. Click **Save**.
15. Repeat this **procedure** for any other interactive message you want to create.
16. Exit the **Interactive Messages** function.

To delete an interactive message:

1. Select **Maintenance > Messaging > Interactive Messages**.
2. Select the **message** from the drop-down list.
3. Click **Delete**. A confirmation message appears.
4. Click **Yes** and exit the **Interactive Messages** function.

Refreshing the data

After all settings are in place in Aloha Manager, you must select Utilities > POS > Refresh POS & All Installed Products to transfer the new information to the Front-of-House (FOH) terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. If you run the refresh prior to the EOD process, select 'Automatically restart all POS terminals' and click OK to continue. After the data refresh is complete, all new settings become operational across the Aloha network.



Caution

Refresh data with caution and never during peak hours of operation. All FOH terminals reboot during a refresh and are down for a short period of time.

Using Interactive Messages

When you receive an interactive message at clock in or clock out, you must answer with a 'yes' or 'no' response. A 'no' response could alert the manager and require manager approval before allowing you to continue. If you give a 'no' response to multiple interactive messages, the manager approval screen appears only once after you acknowledge all messages.

To use an interactive message:

1. Log in to the **Front-of-House (FOH)**.

If you are clocking in, the FOH Clock In screen appears. Select the **job code** for which you will work and touch **Clock In**.

If you are clocking out, touch **Clock Out** to display the Clock Out screen. Touch **Clock Out** again to complete the clock out.

The interactive message appears.

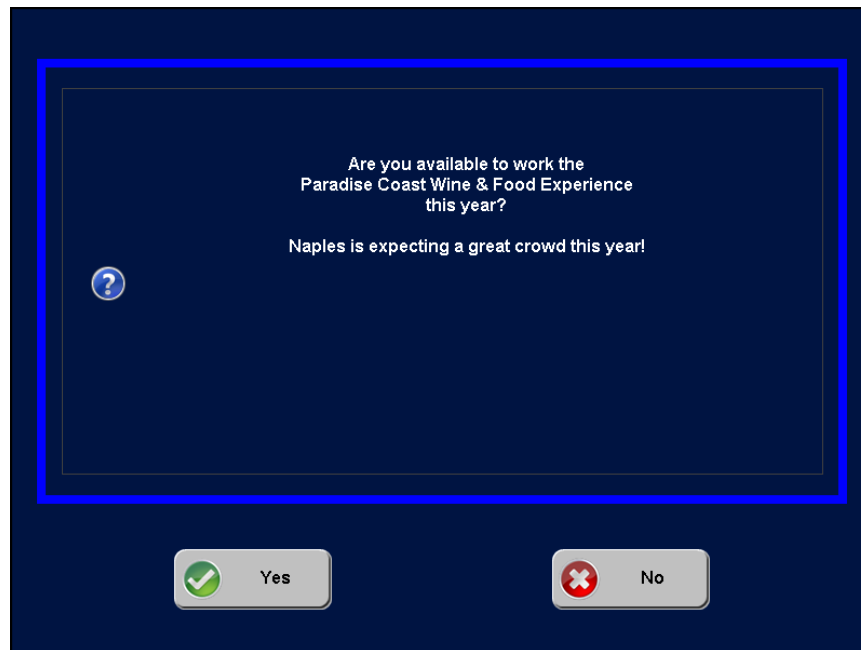


Figure 7 Interactive Message



Note

Depending upon the system, you may need to perform several functions during the process, such as performing a checkout, declaring your tips, contributing in a tip-share pool, viewing a clock in movie, or respond to other on-screen messages, such as a waive break message, a clock in message, or a birthday message.

2. Select **Yes** to answer 'Yes' to the message and end the procedure.
-OR-
Select **No** to answer 'No' to the message and continue with the procedure. If the system is configured for manager approval, the manager approval screen appears.

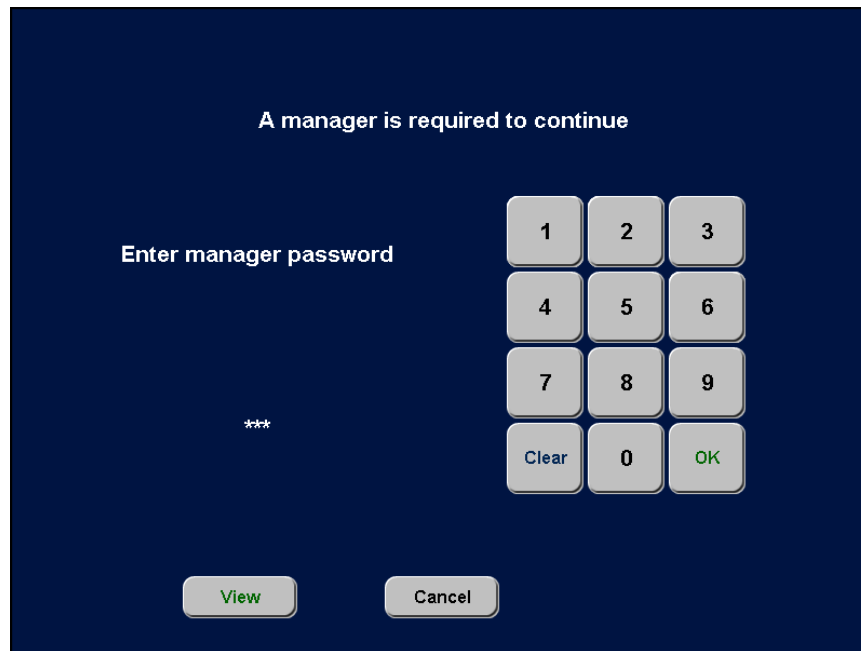


Figure 8 Manager Approval Screen

3. If necessary, touch **View** to view the name of the interactive message.

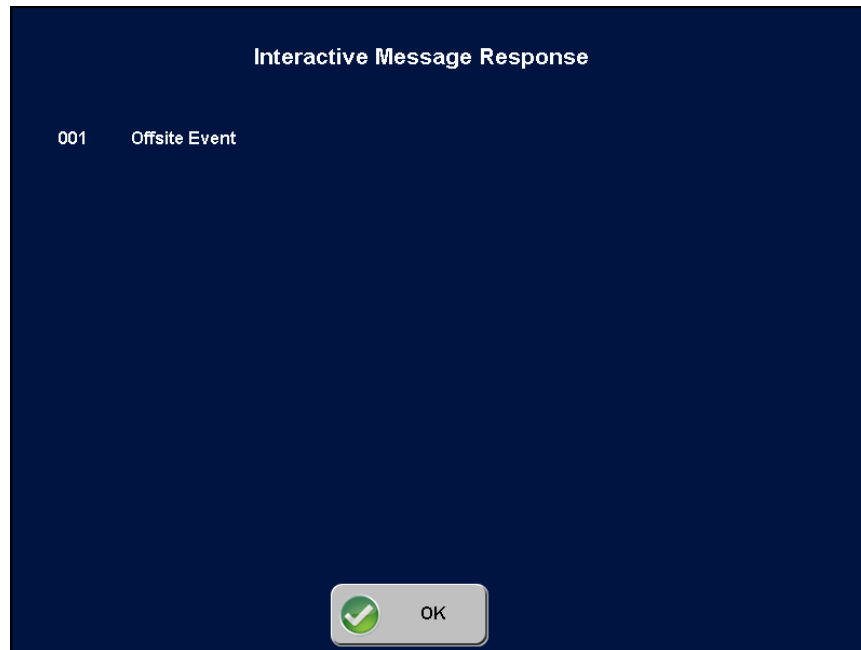


Figure 9 Interactive Message Response Screen

4. Touch **OK** to return to the Manager Approval screen.
5. A manager, or an employee with similar access, must enter their **password** to continue with the clock in or clock out.

 **Tip**

If a manager is clocking you out using the Clock Out button on the Edit Clock In/Out screen, or you are still on the clock when End-of-Day (EOD) occurs, interactive messages do not appear for any subsequent clock in functions.

A notification chit for the manager may print to a local printer.

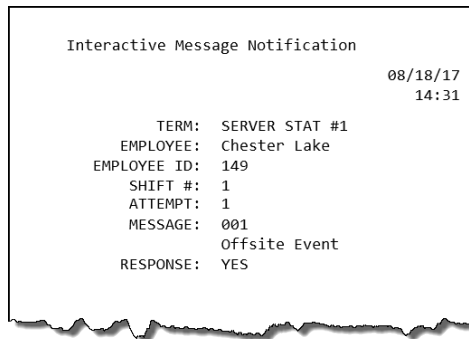


Figure 10 Interactive Message Notification Chit

Reporting Interactive Messages

Use the Interactive Message Response report to view the responses received from each employee.

To run the interactive message report:

1. Select **Reports > Aloha Point-of-Sale > Employee > Interactive Message Response**. The Interactive Message Response Report dialog box appears.

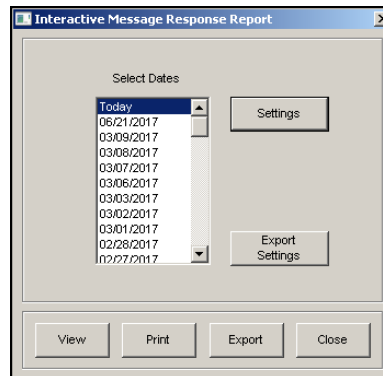


Figure 11 Interactive Message Response Report Dialog Box

2. Select a single date, or a range of dates, from the selection list.
3. Click Settings. The Interactive Message Response Report Settings dialog box appears.

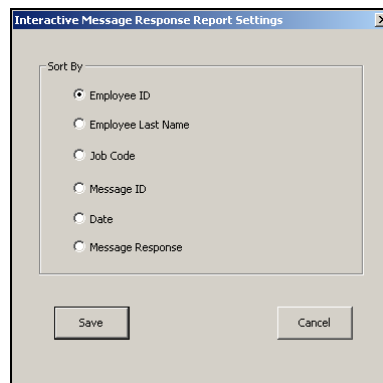
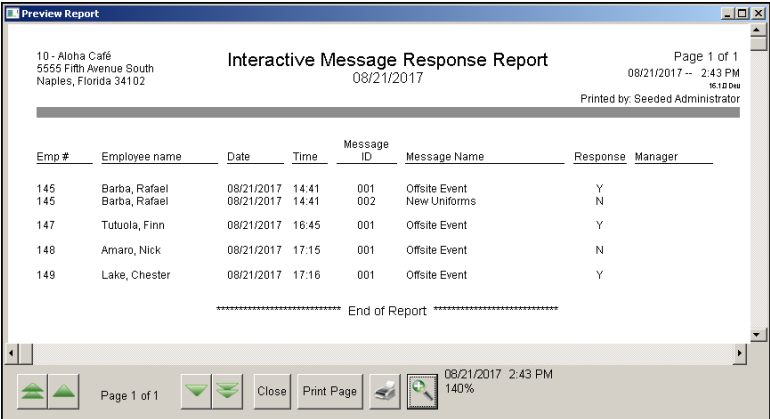


Figure 12 Interactive Message Response Report Settings Dialog Box

4. Select either **Employee ID, Employee Last Name, Job Code, Message ID, Date, or Message Response** to determine the sort order for the report.
5. Click **Save**.

6. Click **View**, **Print**, or **Export** to review the report.

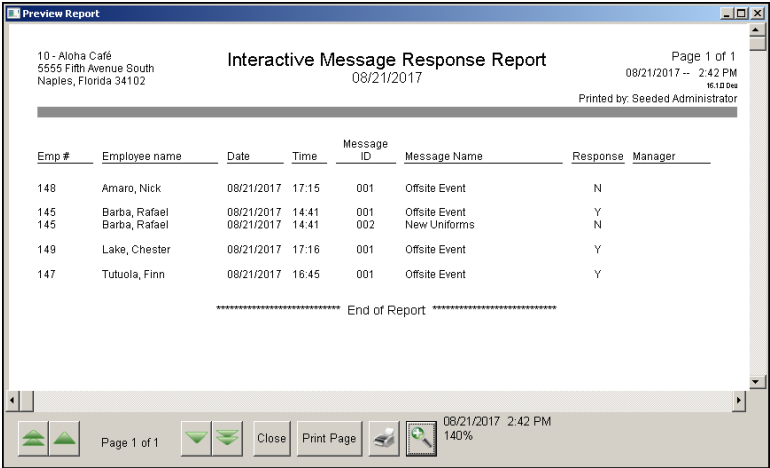


The screenshot shows a 'Preview Report' window for 'Interactive Message Response Report' dated 08/21/2017. The report header includes the address '10 - Aloha Café, 5555 Fifth Avenue South, Naples, Florida 34102' and the printer 'Seeded Administrator'. The table below lists message responses for five employees.

Emp #	Employee name	Date	Time	Message ID	Message Name	Response	Manager
145	Barba, Rafael	08/21/2017	14:41	001	Offsite Event	Y	
145	Barba, Rafael	08/21/2017	14:41	002	New Uniforms	N	
147	Tutuola, Finn	08/21/2017	16:45	001	Offsite Event	Y	
148	Amaro, Nick	08/21/2017	17:15	001	Offsite Event	N	
149	Lake, Chester	08/21/2017	17:16	001	Offsite Event	Y	

***** End of Report *****

Figure 13 Interactive Message Response Report - Employee ID Example



The screenshot shows a 'Preview Report' window for 'Interactive Message Response Report' dated 08/21/2017. The report header includes the address '10 - Aloha Café, 5555 Fifth Avenue South, Naples, Florida 34102' and the printer 'Seeded Administrator'. The table below lists message responses for five employees, sorted by last name.

Emp #	Employee name	Date	Time	Message ID	Message Name	Response	Manager
148	Amaro, Nick	08/21/2017	17:15	001	Offsite Event	N	
145	Barba, Rafael	08/21/2017	14:41	001	Offsite Event	Y	
145	Barba, Rafael	08/21/2017	14:41	002	New Uniforms	N	
149	Lake, Chester	08/21/2017	17:16	001	Offsite Event	Y	
147	Tutuola, Finn	08/21/2017	16:45	001	Offsite Event	Y	

***** End of Report *****

Figure 14 Interactive Message Response Report - Employee Last Name Example

10 - Aloha Café
5555 Fifth Avenue South
Naples, Florida 34102

Interactive Message Response Report
08/21/2017

Page 1 of 1
08/21/2017 -- 2:45 PM
16:10 Dec
Printed by: Seeded Administrator

Emp #	Employee name	Date	Time	Message ID	Message Name	Response	Manager
Jobcode Bar Upstairs							
145	Barba, Rafael	08/21/2017	14:41	001	Offsite Event	Y	
145	Barba, Rafael	08/21/2017	14:41	002	New Uniforms	N	
Jobcode Server Upstairs							
147	Tutuola, Finn	08/21/2017	16:45	001	Offsite Event	Y	
148	Amaro, Nick	08/21/2017	17:15	001	Offsite Event	N	
149	Lake, Chester	08/21/2017	17:16	001	Offsite Event	Y	

***** End of Report *****

Page 1 of 1 Close Print Page 08/21/2017 2:45 PM 140%

Figure 15 Interactive Message Response Report - Job Code Example

10 - Aloha Café
5555 Fifth Avenue South
Naples, Florida 34102

Interactive Message Response Report
08/21/2017

Page 1 of 1
08/21/2017 -- 2:46 PM
16:10 Dec
Printed by: Seeded Administrator

Emp #	Employee name	Date	Time	Message ID	Message Name	Response	Manager
145	Barba, Rafael	08/21/2017	14:41	001	Offsite Event	Y	
147	Tutuola, Finn	08/21/2017	16:45	001	Offsite Event	Y	
148	Amaro, Nick	08/21/2017	17:15	001	Offsite Event	N	
149	Lake, Chester	08/21/2017	17:16	001	Offsite Event	Y	
145	Barba, Rafael	08/21/2017	14:41	002	New Uniforms	N	

***** End of Report *****

Page 1 of 1 Close Print Page 08/21/2017 2:46 PM 140%

Figure 16 Interactive Message Response Report - Message ID Example

10 - Aloha Café
5555 Fifth Avenue South
Naples, Florida 34102

Interactive Message Response Report
08/21/2017

Page 1 of 1
08/21/2017 -- 2:46 PM
16:10 Dec
Printed by: Seeded Administrator

Emp #	Employee name	Date	Time	Message ID	Message Name	Response	Manager
145	Barba, Rafael	08/21/2017	14:41	001	Offsite Event	Y	
147	Tutuola, Finn	08/21/2017	16:45	001	Offsite Event	Y	
148	Amaro, Nick	08/21/2017	17:15	001	Offsite Event	N	
149	Lake, Chester	08/21/2017	17:16	001	Offsite Event	Y	
145	Barba, Rafael	08/21/2017	14:41	002	New Uniforms	N	

***** End of Report *****

Page 1 of 1 Close Print Page 08/21/2017 2:47 PM 140%

Figure 17 Interactive Message Response Report - Date Example

10 - Aloha Café
5555 Fifth Avenue South
Naples, Florida 34102

Interactive Message Response Report
08/21/2017

Page 1 of 1
08/21/2017 -- 2:47 PM
16.12 Dm
Printed by: Seeded Administrator

Emp #	Employee name	Date	Time	Message ID	Message Name	Response	Manager
148	Amaro, Nick	08/21/2017	17:15	001	Offsite Event	N	
145	Barba, Rafael	08/21/2017	14:41	002	New Uniforms	N	
147	Tutuola, Finn	08/21/2017	16:45	001	Offsite Event	Y	
149	Lake, Chester	08/21/2017	17:16	001	Offsite Event	Y	
145	Barba, Rafael	08/21/2017	14:41	001	Offsite Event	Y	

***** End of Report *****

Page 1 of 1 Close Print Page 08/21/2017 2:50 PM 140%

Figure 18 Interactive Message Response Report - Message Response Example

- 7. Click **Close** to close the report.
- 8. Click **Close** to close the Interactive Message Response dialog box.

Troubleshooting Interactive Messages

If you attempt to add more than one employee from the 'Available' list on the Employees tab in Maintenance > Messaging > Interactive Messages, the following error message 'Employee {last name, first name} may not be assigned to the included list, as it would exceed the limit of 1 per store.'

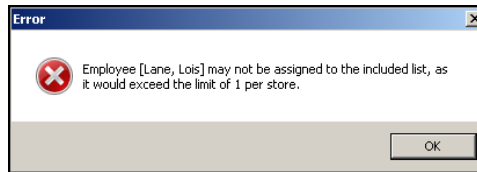


Figure 19 Exceeding the Limit

Click OK to close the error message.

Interactive Messages, Feature Focus Guide

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