

# **Aloha Table Service v19.11 Screen Designer Guide**

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Atlanta

Georgia

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## Revision Record

Date	Version #	Description of Change
09/15/2022		Updated to use new templates.
09/18/2023	v19.9	Added two new button functions: <ul style="list-style-type: none"><li>• Gift Card Query Balance For Tender</li><li>• Multiple Item Scanning</li></ul>
07/17/2024		Updated document to reflect NCR Voyix branding.
01/29/2025	v19.11	Incremented version number.

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## About this guide

The Aloha<sup>®</sup> Table Service Screen Designer Guide describes how to build panels and screens for your order entry system. This guide helps familiarize you with the basic and advanced features of Screen Designer, and provides overview, procedural, and field-level descriptions, as necessary.

## Is this guide for you?

The Aloha Table Service Screen Designer Guide is intended for anyone who is responsible for creating the panels and screens that appear on the Aloha Table Service order entry screen. A new user might read the entire guide to gain an understanding of what Screen Designer is and how it is designed to operate. An experienced user that already has the basic knowledge to use Screen Designer might access this user guide to look up specific option descriptions, or to revisit procedural information, as necessary.

The Aloha Table Service Screen Designer 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 Aloha Table Service.
- Basic understanding of restaurant terminology and concepts.
- Basic understanding of PCs and Microsoft<sup>®</sup> Windows<sup>®</sup>.
- 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.

## Conventions used in this guide

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

### Text conventions

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

Example	Description
Click <b>Save</b> .	Indicates buttons that require activation by a mouse, or by a function key on the keyboard.
Press <b>Tab</b> .	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.

### 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.



#### Caution

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



#### 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.

## About Screen Designer

Screen Designer is a robust tool that enables you to create and modify the Point-of-Sale (POS) screens. From creating a floor plan of a store, to replacing specific areas of the Front-of-House (FOH) screen with custom panels, Screen Designer enables you to enhance the look and functionality of the Aloha POS system.

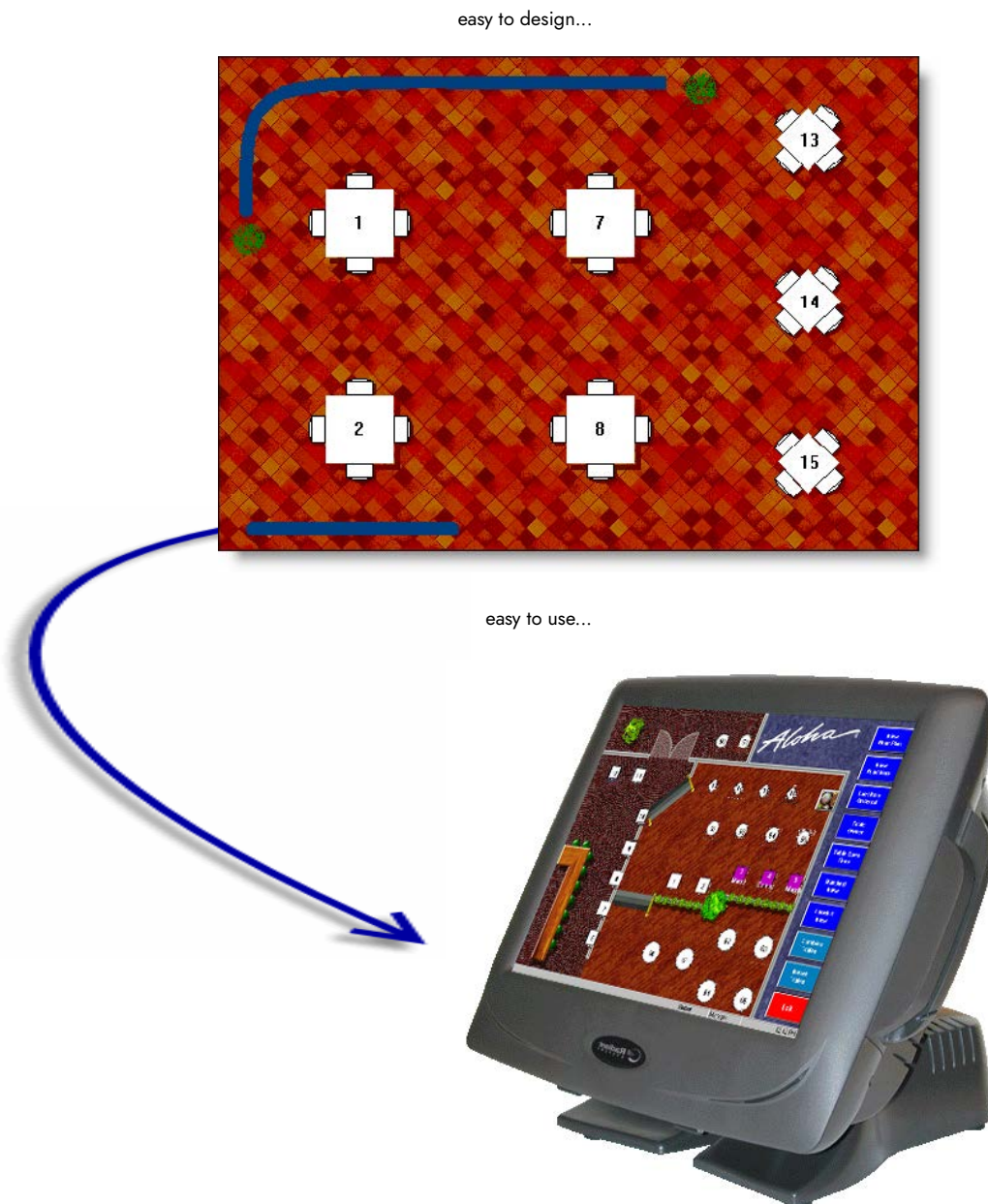


Figure 1 Screen Designer for Table Service

Screen Designer provides tools to easily build custom panels and default screens used for the Aloha Table Service order entry system. Screen Designer has three main components: Panel Editor, Screen Editor, and Screen Simulator.

- **Panel Editor** enables you to create and edit the panels that combine to create your order entry screen, as well as the buttons and images you want available on each panel. Being able to design an order entry screen with multiple panels offers a tremendous amount of flexibility for your order entry process.
- **Screen Editor** enables you to build your Table Service screens from the selection of existing panels created in Panel Editor. With Screen Editor, you create different screens to target a specific job code, such as a server or manager.
- **Screen Simulator** enables you to perform a test on a selected screen, including the panels and buttons used to build the screen. Screen Simulator allows you to drill down to the various sections of a screen and verify that each button operates as designed and that any 'chained' panels link to other panels, as intended, as well as verify the overall layout of all the panels on a screen.

The main question that arises when working with Screen Designer is what do you need to create first, the panels or the screens? Remember, screens are made up of panels; therefore, you need to create the panels you will use for your screens, then create default screens and assign specific panels to the default screens. In some instances, you will go directly to the Work with Screens option, when you already have existing panels, but need to create a new default screen with a different combination of panels.



## Understanding owners in Screen Designer

If you manage multiple sites using CFC, the system requires you to assign an 'owner' to each panel or screen you add to the system. An owner could be the corporate office of a restaurant organization, a specific concept or brand (when an organization has multiple concepts), a franchisee, or an individual store that requires control of specific database records within the database.



### Tip

Owners should already exist in the system, before you start to work in Screen Designer.

The owner assigned to a panel or screen record determines how the panel or screen is filtered, when data is distributed to a store. This provides better control over managing which stores receive specific panels or screens during the data distribution process, within a multi-store, multi-owner organization.

Ownership also affects security of panels and screens. Each owner has an inherent 'record hierarchy level.' The record hierarchy level (Global, Corporate, or Store) attached to the owner becomes attached to the panel or screen 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 panel or screen.

## What's new in Screen Designer

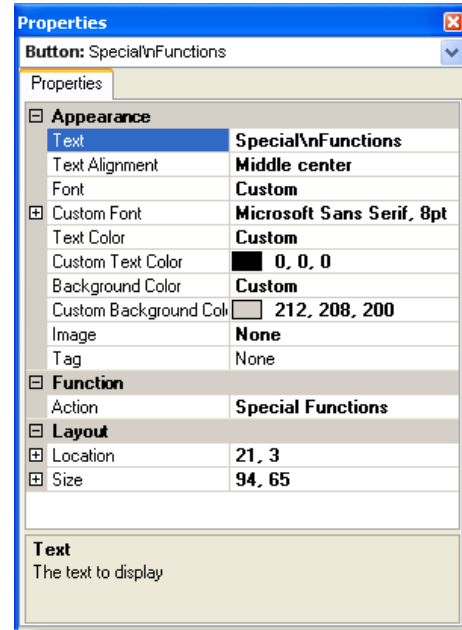
Below are the most significant new or redesigned features to help you easily create and maintain floor plans and custom panels for the Aloha POS system.

### Properties Window

View and edit the attributes for a selected panel or panel elements, such as buttons, using the Properties window.

The Properties window appears automatically when you select a panel or panel element. Use the Properties window to quickly view or modify the current property settings for panels, buttons, images, and button grids.

For example, if you click in a panel, the Properties window displays the settings for the selected panel, including the title, font, color, panel ID number, screen location, size, and much more. When you edit a property setting, the change appears immediately.

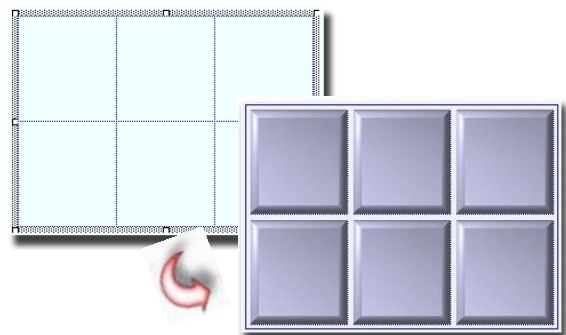


### Button Grid

Create, organize, and resize multiple buttons quickly, with the new button grid tool.

Specify the number of buttons you want, as well as other attributes, in the Properties window. The buttons snap into place in the grid, when you right-click inside the grid and select 'Fill grid with buttons.'

The button grid also helps you make layout changes to your buttons, while keeping each button stationary, aligned, and evenly spaced. This is a great way to rearrange existing buttons without moving each button individually.



### Panel and Screen IDs

Assign unique record IDs for panels and screens. The record ID for a panel or screen enables you to better organize your screen elements and quickly select them from a list, when you need to modify a screen element.



### Panel and Screen Versioning

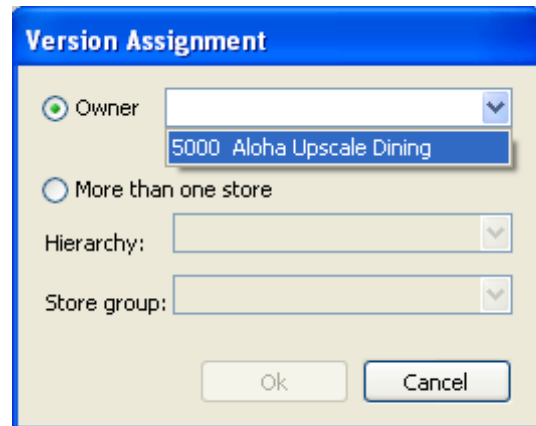
Create versions of a panel to manage store panel variations. Most of the panels you create for your order entry screen are probably used at all store locations; however, when some of your stores need to offer different options on their order entry screen, you can use versioning to support those panel variations at each store. In addition to creating a version of a panel, you can also create versions of the default screens.

You can assign a version to a single store, or a group of stores, when you set up store group hierarchies in the system.

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.

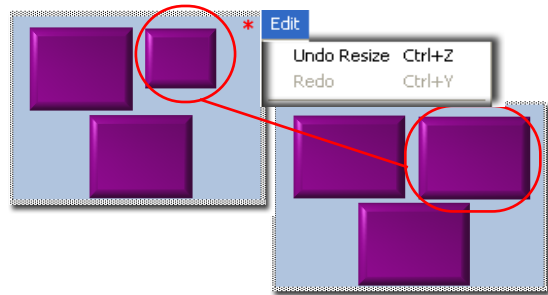
For each hierarchy you define, you can create several store groups to associate to the hierarchy, and then assign stores to each store group.

Any versions you assign to a store group are automatically associated to each store in the store group.



### Undo/Redo Function

Reverse or repeat a previous action using the handy Undo/Redo options. You can undo or redo most actions, up to the last save. You can also use the Ctrl+Z or Ctrl+Y shortcut keys, to undo or repeat an action.



### Multi-Selection Edits (Lasso)

Select multiple buttons on a panel and make the same attribute changes to all the selected buttons, at the same time.

#### To select multiple buttons at the same time:

Click in an empty area of the panel, then drag the mouse to **lasso** a region of buttons you want to select.

**or**

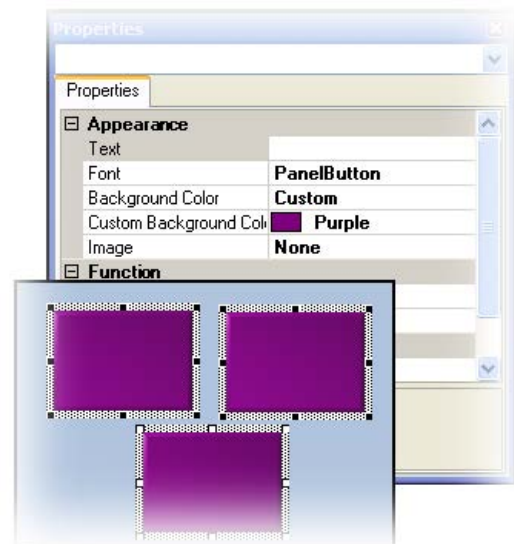
Press and hold the Shift key and drag the mouse over the buttons you want to select.

**or**

Press and hold the Ctrl key, and click each button you want to select.

#### To edit a property setting for the selected buttons:

In the Properties window, locate the property you want to change, and make the appropriate change in the right column of the property. The changes take effect immediately to all selected buttons.



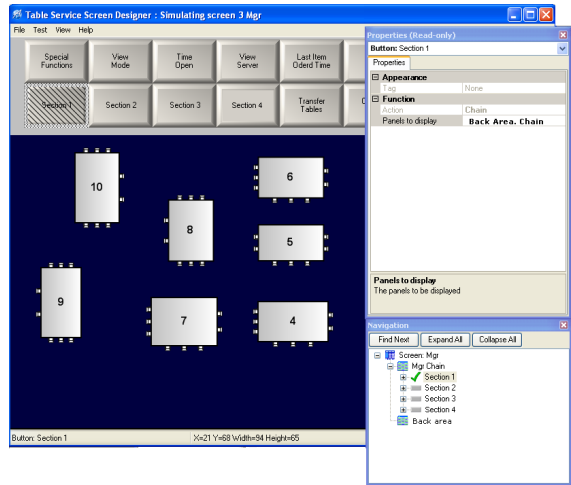
### Screen Simulator with Navigation

Perform a virtual test of a selected screen to verify the screen flow and functionality of the panels and buttons used to build the screen.

The Properties window is 'view only' and lists the current properties for a selected screen element, such as a panel or button. If you click on a button, the Properties window displays the button function property only.

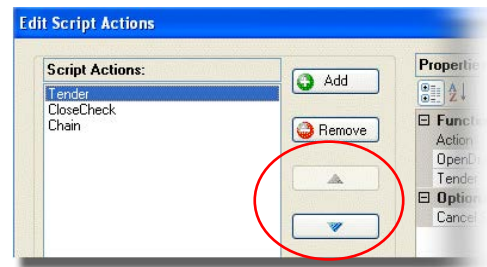
The Navigation window enables you to view the screen flow of panels linked together by 'chain' buttons. You can verify that buttons 'chain' or link to the proper panels.

You access Screen Simulator from the Panel menu in Panel Editor.



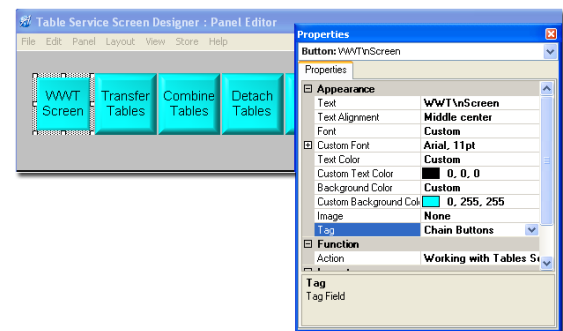
### Script Function Re-Sort

Change the order in which a button function operates on the POS terminal, when you create or modify an applicable script button. The Re-sort feature enables you to change the order in which the functions appear in the Script Actions list. Click the applicable button, to move a function up or down in the list.



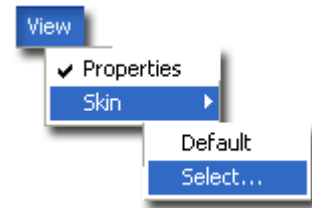
### Button Tags

Assign select buttons to a specific tag group. When you assign a button to a tag group, you can easily activate and deactivate buttons using the Activate Panel Button event in the Event Schedule function. Set up an Activate Panel Button event to activate a specific Tag, and all buttons assigned to that tag group are activated, no matter on what panel they reside.



### Skin Selection

Apply pre-defined color groups to panels, buttons, and backgrounds, automatically. The Skin feature enables you to assign a color scheme to multiple panels and buttons, at one time. This saves you time when you have to build many panels and buttons for an order entry screen.



## How to use Screen Designer

The Aloha POS system is made up of a collection of panels and panel elements that form the order entry screen you use to handle sales transactions and other operational functions from your Front-of-House (FOH) terminal.

### Including images and other multi-media files

Multi-media files include the images and videos that ultimately appear on the Aloha POS system to enhance the order entry process, or provide training for your employees. For example, in Maintenance > Menu > Items > Item tab, the 'Button image' option enables you to assign a graphic image to an item record, which represents the item on the POS screen. Recipe videos enable you to train staff on how to prepare certain menu items, and images are used frequently in Screen Designer, when you need images to appear on panels and buttons.

You can create your own custom files, such as a company logo or recipe video; however, to make media files available for use in the system, you must first add the image(s) in Maintenance > System Settings > Media Files.

If you are CFC user and you add an image to the system, the image record follows the same ownership rules as any other record; therefore, if you want the image available at multiple stores, you need to assign a global- or corporate-level owner to the record. But, if you want the image available at a single store, assign the store as the owner of the record. An individual store can also upload a media file, but it will be available at that store only. And if the store wants to assign a different media file to a corporate-owned record, a version of that record must exist, for the store to modify.

#### Note

When you import data into Table Service, direct the system to the Bmp and Recipe folders in the \Aloha directory, which holds the images and other media files used with the Aloha POS system. The system imports **only** the media files referenced by records in the current data set. If after an import, you determine you want to use other files that were in the BMP or Recipe folders, you must first upload those files using the Media Files function.

The system supports the following multi-media file types:

Option	Supported Media File Type	Used to...
<b>Button Image</b>	Bitmap - <b>.bmp</b> JPEG - <b>.jpg</b> Portable Network Graphic - <b>.png</b>	Assign an image to an item button.
<b>Recipe Image</b>	Bitmap - <b>.bmp</b> Portable Network Graphic - <b>.png</b>	Assign an image to a recipe, in addition to the recipe text.
<b>Recipe Movie or Clock-In Movie</b>	Audio/Video Interleave - <b>.avi</b> Advanced Streaming Format - <b>.asf</b> Small Web Format, or Shock wave Flash Format - <b>.swf</b> Windows Media Video - <b>.wmv</b>	Assign an audiovisual file to a recipe, in addition to the recipe text. Assign a movie for an employee to view at clock-in.
<b>Tender Image</b>	Bitmap - <b>.bmp</b> Portable Network Graphic - <b>.png</b>	Assign an image to a tender type button.
<b>Script files</b>	Visual Basic Script - <b>.vbs</b> Java Script - <b>.js</b> Perl Language - <b>.pl</b> XML Script - <b>.xst</b>	Assign a customized script to a button.

## Panels

A panel is a section of a screen on which you add the panel elements (i.e., buttons and images) you want to appear on the POS terminal. In Table Service, the system uses pre-defined panels to create most areas of the order entry screen. Generally, these panels are considered hard-coded; you cannot change their look and feel; you can only modify the buttons that appear on the panels, based on the



menu items offered, or the system configuration options you select in Aloha Configuration Center; however, with Screen Designer, you can enhance certain areas of the order entry screen.

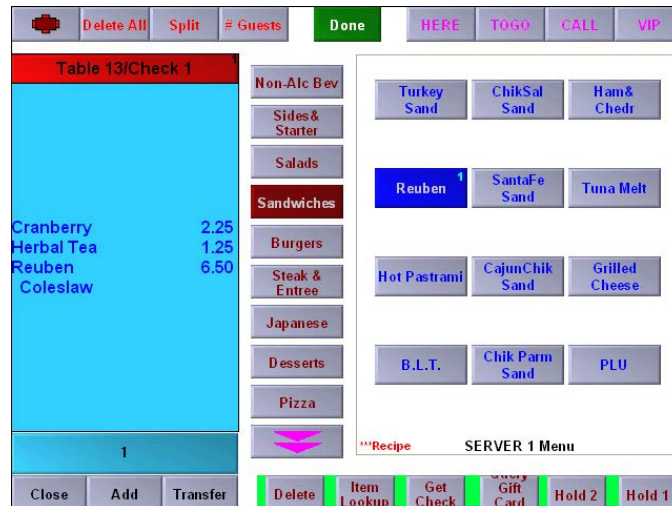


Figure 2 Standard Table Service Order Entry Screen

## Panel elements

Panel elements are objects you place on a panel to perform specific functions in the Aloha POS system. There are two types of panel elements: buttons and images.

A **Button** is a type of panel element used to define the menu items and functions that appear on the Aloha POS system. You place buttons on panels and you can define the size, shape, color, text, and position of a button, as well as the function, or behavior, of the button. For example, you might add a PLU lookup button to a panel so an employee can search for a specific menu item on the Aloha POS terminal.

You use **Bitmaps/Images** to enhance the look and functionality of buttons and panels. Images can replace text on a button or enhance the background design of a button or panel. For example, you can add a company logo to a panel, or you can use a product logo bitmap to replace the button text for a well known beverage item button, such as Pepsi.



Figure 3 Example of Buttons with Bitmaps on a Panel

**Tables** and **Walls** are panel elements you use to build a representation of your restaurant. These panel elements are used with the Floor Plan feature only.

## Creating a floor plan

The Table Service POS system uses hard-coded screens for most areas of the order entry screen; however, you can make certain enhancements to the order entry screen. The Floor Plan feature replaces the Working with Tables screen as the default screen used to start a new order, and integrates the panels, buttons, and screens created in Panel Editor and Screen Editor. With a little creativity and Panel Editor tools, you can create a functional floor plan that represents the layout of your restaurant.

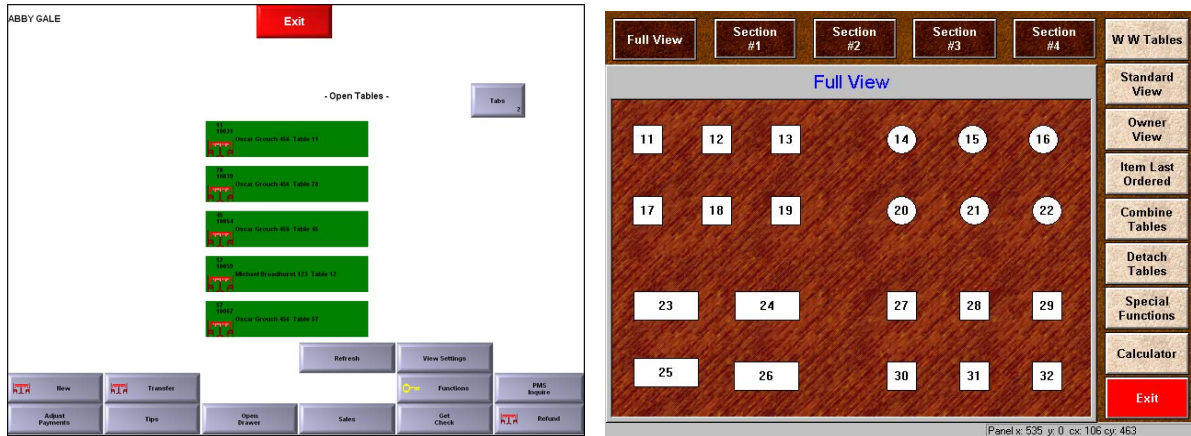


Figure 4 Example Working with Tables and Basic Floor Plan Screens

The Floor Plan Interface has the following benefits:

- **Start Tables Faster and Easier** — Enables you to start a new table faster and with less keystrokes.
- **Multiple View Modes** — Enables you to view the status of tables, such as ownership, time opened, and check number.
- **Drill Down into Separate Sections** — Enables you to view individual sections of the Floor Plan screen.
- **Combine and Separate Tables** — Enables you to pull together and detach tables.
- **Design with Bitmaps and Colors** — Enables you to add bitmaps and colors for a custom design. You can make your Floor Plan screen as elaborate or as simple as you want. You can define the size, color, and position of each panel. You can even add a title border to a panel, or create panels without title borders, for a more seamless look.

Access to the Floor Plan screen is controlled by an employee's job code or by the terminal they use. The Floor Plan feature is NOT designed for table management where other employees, such as host staff and bussers, receive notifications and monitor tables to continue with their duties.

Your Floor Plan screen can be very elaborate, or it can be very basic and functional:

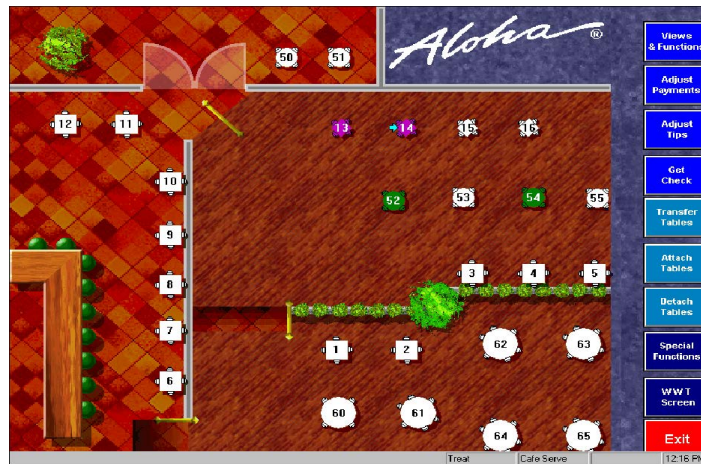


Figure 5 Example of an Elaborate Floor Plan (Table Owner View)



Figure 6 Example of a Basic Floor Plan

### Note

The 'Basic' floor plan example is the layout you should follow when you create a floor plan.

We recommend you follow a specific process to build your floor plans, ensuring a successful and usable floor plan screen. This section provides an overview for each step of the build process:

## 1. Planning the layout design

Before you begin building a floor plan in Screen Designer, first take time to analyze the type of floor plan your establishment requires. Adding new panels in the future may seem like a simple step, but could require major adjusting and resizing to other panels on the screen. If necessary, sketch the design on paper before beginning.

## Floor plan sections

Determine how many sections you want to access in your floor plan design. For example, you might have a main section that represents the main dining room, and two additional sections that represent the patio area and large group meeting areas of your restaurant. If you create a section for each area, it will be easier to access tables on the FOH because an employee can touch the section they want, and then touch the table in that section to start or revisit the guest check for the table.

## Employee job codes

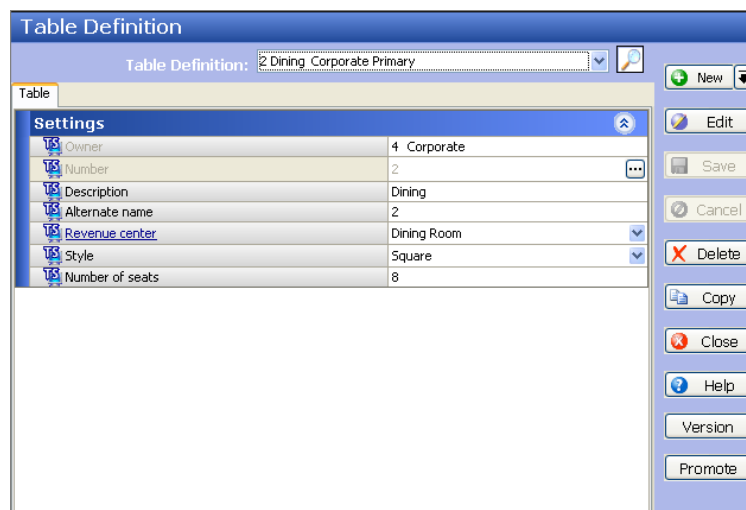
Think about the job codes that will use the Floor Plan feature. Do you want only the manager to use Floor Plan, or do you want the manager, hostess, and servers to be able to access Floor Plan, as well? Remember, the Floor Plan feature replaces the Working with Tables screen as the default way to access a table. If you do not activate Floor Plan for a specific job code, an employee can still access tables through the Working with Tables screen, as long as you configure their job code for 'order entry' or 'bartender.'

## Employee functions

Determine the functions that the intended job codes will need to have, such as the ability to view table status, perform a 'get check,' or adjust tips. You can place these function buttons on one or more of the panels you create for the floor plan.

## 2. Creating the tables

Tables are used in Floor Plan to open a new check for a corresponding, physical table. Before you can add tables and seats to a floor plan design, those tables must exist in the Aloha Configuration Center database. Access Maintenance > System Settings > Table Definition to set up tables.



Here is where you define all the tables in your establishment, including the style of table and the number of seats the table typically holds.

Figure 7 Table Definition for Floor Plan Tables

You define tables in your restaurant so employees can associate orders to the tables and you must associate each table to a revenue center. You can create up to as many tables as defined in Maintenance > Global Administration.

### 3. Building the panels

Once you define the tables, you can begin to build your Floor Plan panels. Use the 'Floor Plan' panel type to create your floor plan. We recommend a three-panel design, which includes:

- A panel for the main area of the restaurant.
- A panel for function buttons.
- A panel for chain buttons.

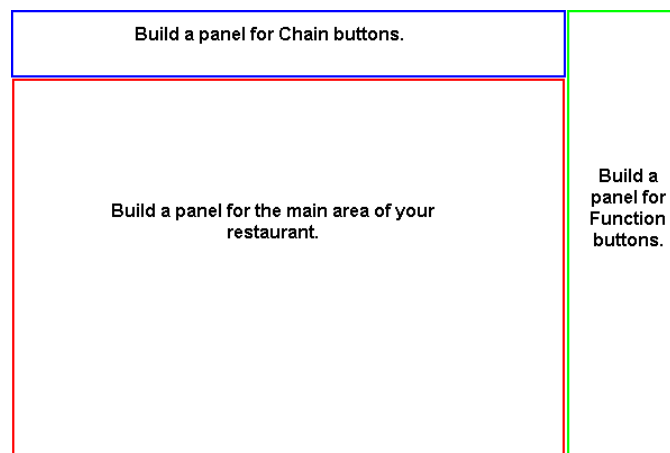


Figure 8 Three-Panel Floor Plan Design

The panel you build for the main area of your restaurant contains the tables, and any other restaurant floor plan elements you want to include, such as walls and bitmap images. The panel you build for function buttons provides access to system/employee tasks, such as viewing the time a table was opened, combining or detaching tables, or accessing the Working with Tables screen. The panel you build for chain buttons enable access to other section panels of the restaurant, or other function panels.

#### 4. Adding the tables, walls, and buttons to floor plan panels

After you lay out and save the panels in Panel Editor, you can add the panel elements, including walls, tables, function and chain buttons, to the appropriate panels.

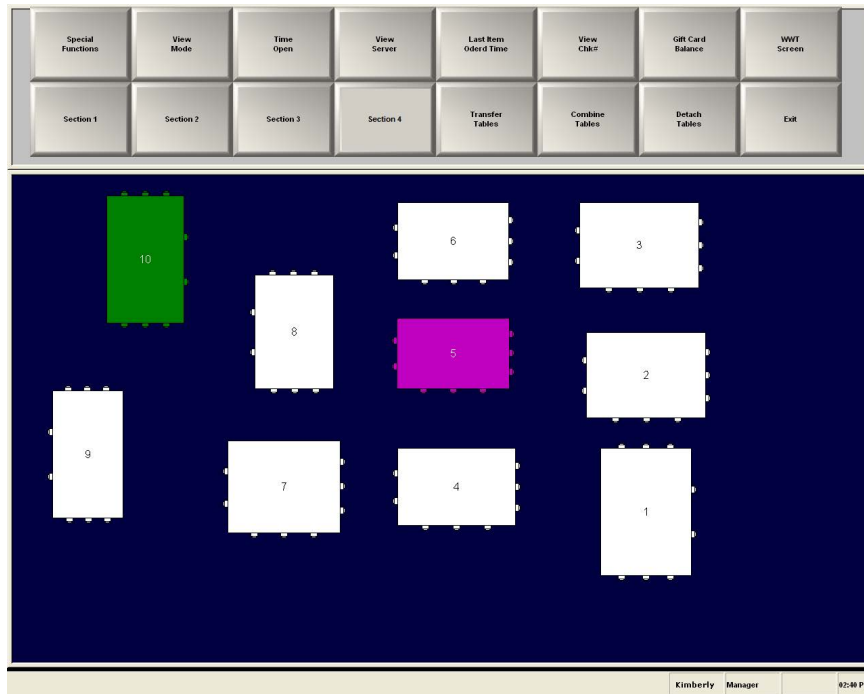


Figure 9 Example Floor Plan Panels with Panel Elements

Use the following table placement strategy to speed up the process of adding tables and additional section panels:

1. Add a 'table' button.
2. Copy the button.
3. Paste the button multiple times.
4. Edit each table button so it is unique.
5. Align the table buttons.
6. Add walls to separate seating areas, as needed, and then save the panel.
7. Make a copy of the panel for each additional section you need.
8. Edit each new section panel and tables, and delete any tables you do not need for that section.
9. Save 'All Panels.'

You can add the following button functions to a Floor Plan panel:

Adjust Payments	Custom Activity	None	Report Break Alert
Adjust Tips	Custom Report	Open Drawer	Report Restaurant Sales and Labor Statistics
Alerts	Dashboard	PMS Check	Reroute Display Board
Alternate Language GC Receipt	Delivery TableService	PMS Inquire	Run Application
Assign Price Change	Detach Tables	Print Message	Sales Summary
Automation Script	Exit	Quebec Fiscal Printing	Script
Break	Get Check	Query Gift Card Balance	Special Functions
Chain	Gift Card Cash Out	Quick Combo	Transfer Tables
Checkout	Item Lookup	Quick Count	View Schedule
Clock Out	Just-in-time Manager Approval	Refund	View Tables Mode
Combine Tables	New Tab	Release Locked Employee	Working with Tables Screen

## 5. Building and testing the default screen

After you finish building the Floor Plan panels, use Screen Editor to combine panels and save them as a 'default screen.'

A default screen is the screen that first appears when an employee accesses a POS terminal, and is determined by the job code to which the employee is assigned or the terminal they are using. A default screen consists of only those panels you want the employee to see initially. If a default screen is not available when an employee accesses a POS terminal, then no panels are available; therefore, you must create at least one default screen.

You can create more than one default screen, if you want different job codes to use different screens. For example, a server may need a different default screen than a floor supervisor. You can create a different default screen for each job code, but keep in mind, each job code can have only one default screen assigned at a time.

After you build your default screen(s), access Screen Simulator from the Panel menu in Panel Editor, and test each screen. You can quickly view properties for each button on the screen and verify that chain buttons link properly between panels.

Although you cannot make edits while in Screen Simulator mode, you can view the function properties for a button to verify the correct button action is assigned. You can also view the screen flow of panels linked together by 'chain' buttons, which allows you to verify that buttons 'chain' or link

to the proper panels. When you double-click a button in the Navigation window, the navigation tree expands to where the button is in the screen flow and highlights the selected button.

## 6. Activating the default screen

Once a default screen is ready for use, you can either assign the screen to a job code or a terminal to make the screen available at the FOH.

When you assign the default screen to a job code, any employee with that job code can view the screen by default, when they access a POS terminal. You assign to job codes in the Labor function (Maintenance > Labor > Jobcodes). Additionally, you must select 'Enable Floor Plan' for any job code you want to be able to view the Floor Plan screen you built, in place of the standard Working with Tables screen the employee would normally see when they first access the POS terminal.

As an alternative, you can assign a default screen to a terminal, and any employee with the ability to use the terminal will see the default screen.

If you create screens for a multi-store environment, after you assign your default screens to the appropriate job codes, the panels and default screens built in Screen Designer are ready for distribution to stores. When a store receives the new panels and default screens, the store can perform a system refresh to activate the screens on the POS terminals.



## Customizing the order entry screen

Aloha Table Service uses hard-coded screens to maintain familiarity and a consistent screen flow. You can create a custom panel to replace the typical buttons that appear in the lower right portion of the POS order entry screen, which are: Item Lookup, Recipe, Quantity, Repeat, Modify, Delete, and Hold. You can also have an optional fifth order mode in place of the Hold button. Some of these buttons are available at all times, and some depend on the configuration defined in the Back-of-House (BOH).

Use Screen Designer to create a custom panel for this area. You can add any number of buttons and place them in this area; however, you cannot control the size of this panel or move the panel to another location on the screen.

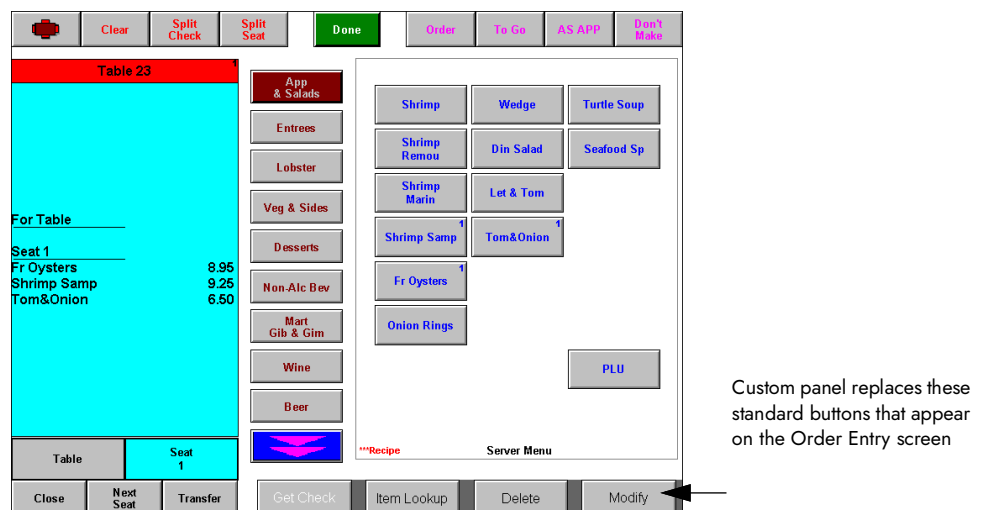


Figure 10 Order Entry Screen with Customized Order Entry Panel

Use the following process to build a custom panel. This section provides an overview for each step of the build process:

### 1. Creating an order entry screen panel

Access Screen Designer > Table Service Screen Designer > Working with Panels to create a custom panel. Use the 'Order Entry Screen' option from the Panel Editor menu bar.

You can create a single Order Entry Screen panel, or you can create multiple panels when you need to control the buttons that appear in this area, based on the job code of the person using the order entry screen.

For example, you might create an Order Entry Screen panel that contains functions a server would use, such as Item Lookup, Quantity, Hold, Modify, Delete, and Repeat. You might create another panel that contains functions a cashier would use, such as Get Check, Reprint Check, and Print Receipt.

## 2. Adding buttons to the order entry panel

When you replace the standard buttons that appear in this area of the Order Entry screen with a custom panel, you must add a button for every function you wish to perform from the new panel. This includes the standard buttons you want to retain. The standard buttons are Item Lookup, Recipe, Quantity, Repeat, Modify, Delete, and Hold.

When you replace this area of the screen with a custom panel, you have the ability to disable certain buttons by job code. For example, if you want to add the Get Check button to the panel for your cashiers, but you do not want your servers to be able to use this function, you can clear the 'Can get checks from other employees' check box for the server job code in Maintenance > Labor > Jobcodes. This way, although the 'Get Check' button is visible for both cashiers and servers, the 'Get Check' function will not work for servers.

You can use one or more 'Chain' buttons to link multiple Order Entry panels together. By linking panels together, you essentially have access to more functions. The following figures provide an example of a chain button that links to additional buttons on another Order Entry Screen panel.

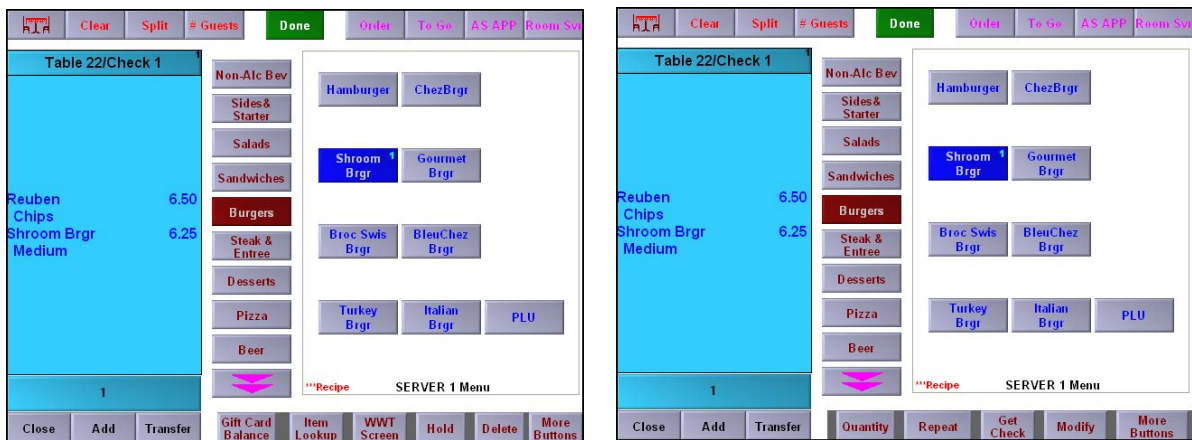


Figure 11 Order Entry Panel with a Link to Additional Button Functions



### Tip

If you link to another panel, remember to provide a way back to the first Order Entry Screen panel.

**You can add the following button functions to an Order Entry Screen panel:**

Alerts	Customer Information	Order Type	Repeat
Alternate Language GC Receipt	Dashboard	Print Message	Report Break Alert
Assign Menu	Delete	Print Receipt	Reprint Check
Assign Price Change	Get Check	Quantity	Reroute Display Board
Automation Script	Hold	Quebec Fiscal Printing	Run Application
Chain	Item Lookup	Query Gift Card Balance	Script
Course	Just-in-time Manager Approval	Recipe	System Monitor
Custom Activity	Modify	Rename Tabs and Tables	Working with Tables Screen
Custom Report	None	Reorder Family Style items	

Refer to the button function definitions in “Appendix B: Button function descriptions” for more information.

### 3. Creating an event to activate the custom panel

After creating your new panel, or panels, access Maintenance > System Settings > Event Schedules to set up a ‘Set Order Screen Panel by Jobcode’ event. This event replaces the existing buttons on the Order Entry screen with new buttons. When you create the event, you must select a job code for which you want the customized Order Entry Screen panel to appear. If you want all employees to use the new panel, you must create an event for each applicable job code. When the event is in effect, each employee clocked in under an applicable job code can view the new buttons on the Order Entry screen.



#### Reference

Refer to [Event Schedule](#) for more information.



#### Tip

After all settings are in place, you must select Utilities > Refresh Data to transfer the new settings to the POS terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. After the data refresh is complete, all new settings become operational on the FOH.

When using a customized Order Entry Screen panel, you operate the FOH as normal and use the new buttons in the lower right portion of the Order Entry screen to perform functions, as needed.

## Customizing the submenu area

The standard Aloha Table Service system uses pre-defined panels for the order entry screen. In addition to being able to customize the Action Item area, you can also customize the Submenu area to enhance the look and functionality of the order entry screen.

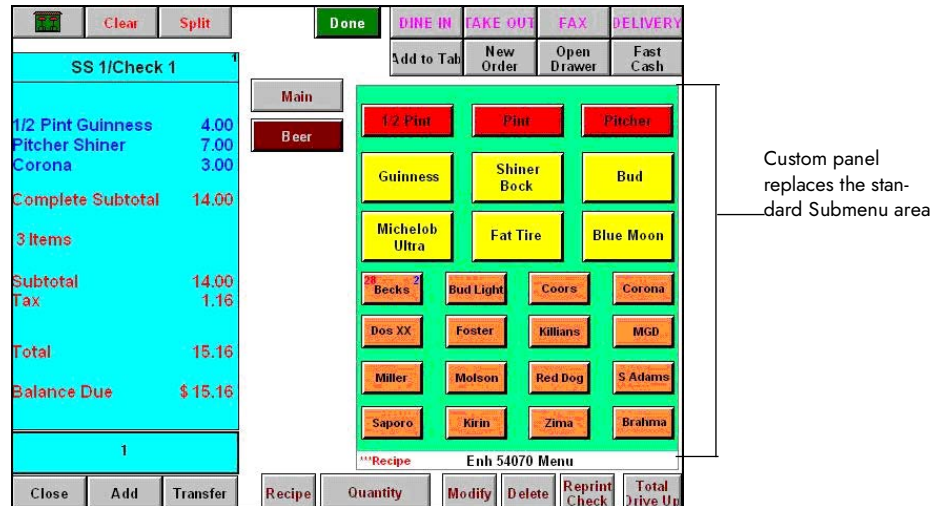


Figure 12 Order Entry Screen with a Custom Submenu Panel

There are many reasons to use a custom panel in place of the standard submenu panel:

**Smart Item and Smart Select Buttons** — You can only use Smart Item and Smart Select buttons, commonly used for beverages that you sell in different sizes, with a custom panel. Smart Item and Smart Select buttons reduce the number of buttons needed on a screen. You cannot use Smart Item and Smart Select buttons with standard submenus.

**Bitmaps** — Unlike the standard submenu, a custom panel allows you to place a bitmap, such as the store's logo, on the submenu itself. Because you create the panel using Panel Editor, you can place a bitmap on a submenu item button in a much easier fashion and you can place a bitmap on an unsigned button that is not associated with a menu item.



### Caution

We recommend you balance the use of bitmaps depending on your processor speed.

**Panel and Button Colors** — Although you can use installed FOH themes or an enhanced graphical interface (EGI) with a standard submenu, a custom panel allows you to add any background color you want. For example, if your brand colors are pink and yellow, you can customize your submenus with alternating pink and yellow backgrounds. A custom panel also allows you to set the color on a sub-

menu item button. For example, you can set all your salad items to green and all your hot items to orange. We recommend using the colors red and blue sparingly, as the system uses these colors for indicators on the button with other features, such as Recipes and Item Availability.



### Caution

We recommend you balance the use of panel and button background colors, depending on your system processor speed. Setting the background color of a Submenu panel to 'transparent' helps eliminate slow screen redrawing.

Use the following process to build a custom Submenu panel for the Submenu area of the POS order entry screen. This section provides an overview for each step of the build process:

## 1. Creating a submenu panel

Access Screen Designer > TableService Screen Designer > Working with Panels to create a custom panel. To create a replacement panel for the Submenu area, use the 'New Submenu Panel' option from the Panel Editor menu bar.

While setting properties for the panel, we recommend you select 'Transparent' so the panel maintains the same colorization of the FOH order entry screen. Otherwise, you may see a noticeable difference when you pass between a standard Submenu and a custom Submenu panel. Additionally, setting the Submenu panel to transparent reduces the chance of the FOH screen flickering during the redrawing of the panel on terminals with a lower processing speed.



### Note

When using a Submenu panel, the panel is in a fixed position on the screen and you cannot add a border.

## 2. Adding buttons to the submenu panel

On a standard Submenu panel, you can alter the number of columns and rows of buttons you can use on a submenu; however, the buttons appear on the 'submenu area' in numbered order, and in uniform size.

With a custom Submenu panel, the buttons you place on the submenu can have any size and can appear in any order. You can also use any number of columns or rows, as the panel allows. For example, if you want to bring attention to a top selling item, or a row of Smart Select functions, you can resize the buttons to double their normal size.

You can add the following button functions to a Submenu panel:

• Alerts	• Image	• Query Cash Card Balance
• Chain	• Modifier Code	• Query EBT Card Balance
• Count	• None	• Script
• Dashboard	• Order Item	• Smart Item
• Dynamic Text	• Order Modifier	• Smart Select
• Fraction	• PLU List	• Tender

### 3. Replacing the standard submenu with a custom submenu panel

After you create the Submenu panel in Panel Editor, you must select the panel in Table Service, so it will replace the standard panel on the POS order entry screen. Access Maintenance > Menu > Submenu and select the desired custom panel from the Submenu Panel drop-down list.

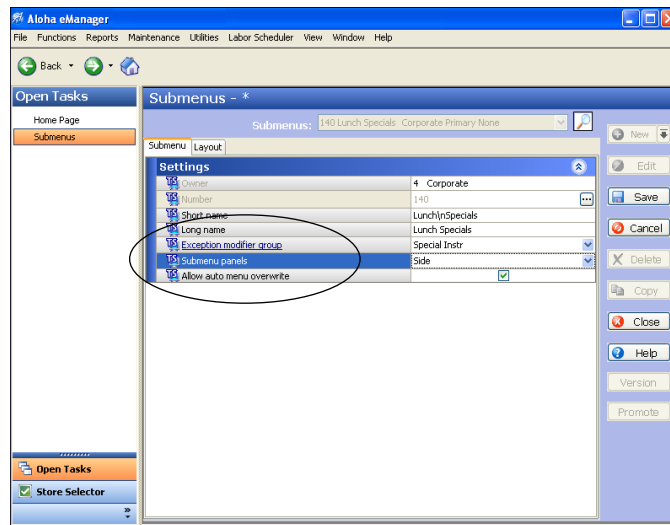


Figure 13 Submenu Function

Once you replace the standard submenu with a custom Submenu panel, you can no longer add submenu buttons to the standard submenu.



#### Caution

Be aware when you replace an existing standard submenu with a custom Submenu panel, you lose all buttons that reside on the selected standard submenu, without the ability to undo the action.

## Submenu panel quick tips:

Submenu panels do not support the following Table Service features, commonly used with standard submenus:

- The 'Suggested Selling Category' feature groups items so they blink on a standard submenu to attract attention and encourage sales of these items. This feature is not supported with a Submenu panel.
- You can allow an employee access to another menu by selecting 'Assign menu' under the 'Financials' group bar in Maintenance > Labor > Pos Access Levels. When you assign another menu to the employee, the 'Other Menu' button appears on each standard submenu, for the respective check. The 'Other Menu' button does not appear on a Submenu panel.
- In AutoMenu Maintenance, you can replace an entire standard submenu. This does not apply to a Submenu panel.
- In Events Maintenance, you can set up a 'Set Submenu Item,' 'Set Auto Menu,' and 'Activate Panel Button' event to activate certain items, menus, or buttons on standard submenus, at specific times of the day. These events do not apply to a Submenu panel.
- Since Smart Items and Smart Select buttons are intended to reduce the number of buttons you place on a panel, some buttons do not appear on the Submenu panel, by design. For example, if you sell a Kids Coke, Small Coke, Medium Coke, and a Large Coke, with Medium Coke as the default selection, then Medium Coke appears on the submenu and the other three selections are not visible. When you use the Recipe feature with Smart Items, the three red asterisks appear on the button only if the default selection has a recipe attached. When you use the Item Availability feature with Smart Items, the item and quantity on hand counters appear on the button designated as the default selection only.

## Customizing the close screen

Aloha Table Service uses hard-coded screens to maintain familiarity and a consistent screen flow. The Close screen is one of those screens. Prior to Aloha POS Table Service v14.1, when using Aloha Takeout (ATO) to accept a future order, to provide a guest with an accurate guest check total with taxes, comps, and promos applied, required advancing to the Close screen to apply any comps or promos and view the taxes on the check. Advancing to the Close screen caused the system to assign an order mode, order the items, and send the items on the guest check to the kitchen. This was unacceptable, as ATO requires an order to remain suspended until the requested order time, without sending the items to the kitchen.

Effective in Table Service v14.1, a new feature allows you to log in as an ATO user, enter a future order, and access a modified version of the Close screen without sending the items to the kitchen. Because the order is in the 'suspended ordering' state, items appear in magenta text in the guest check window. Instead of displaying tenders for selection on the Close screen, comps and promos appear for selection, by default, and you cannot apply payment to the check. The order remains in a 'suspended ordering' state until the order releases to the kitchen at the desired time. When you later access the check to apply payment, the system reverts to the original Close screen because the order is no longer suspended.

You can also customize the buttons that appear on the bottom of the Close screen just like you can customize the buttons that appear on the bottom of the order entry screen. We introduced a new Close Screen panel type that you control by job code and activation/event schedules. We added new button functions that allow you to replace the standard hard-coded buttons that appear in this location on the original Close screen, such as Tax Exempt and Add/Edit Gratuity. We also added the ability to add ATO custom activity interface button functions, such as FLEX\_ENTRY\_COMPLETE, to this panel type, so that you can confirm an ATO order from the Close screen and return to an ATO screen, such



as the Lookup screen. You can use one or more 'Chain' buttons to link multiple panels of the Close Screen type together.

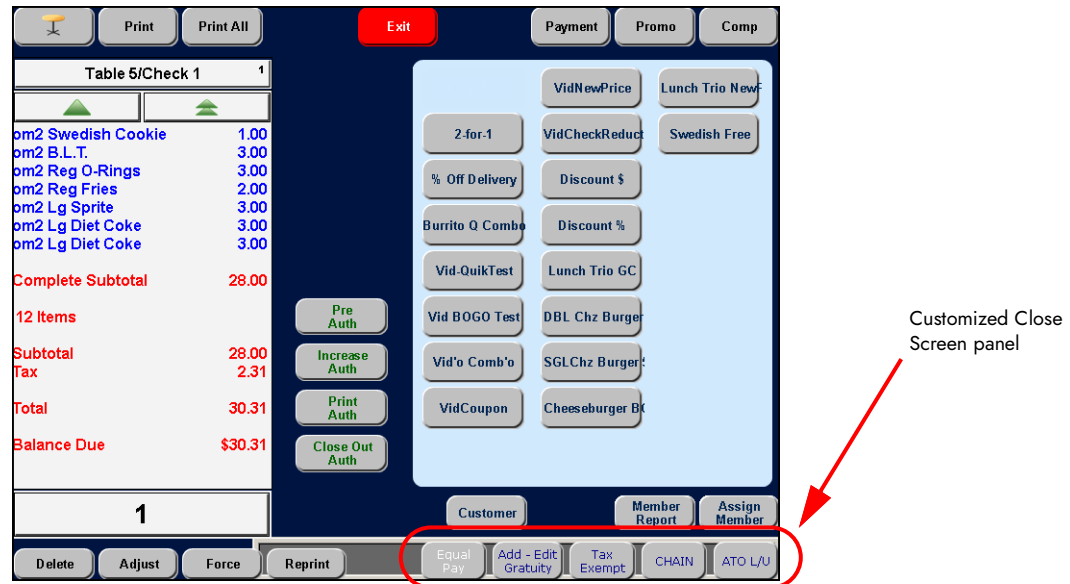


Figure 14 Customized Close Screen Panel

To customize the Close screen for use with ATO:

- Create a panel of the Close Screen type and add the buttons you require, both the hard-coded buttons you need to retain, as well as the Custom Activity Interface button needed to confirm an order and return to an ATO screen. New button functions that replace original hard-coded buttons include Add/Edit Gratuity, Equal Pay, Promo Lookup, Surcharge Functionality, and Tax Exempt. Use the Custom Activity button function to enter the FLEX\_ENTRY\_COMPLETE command to provide a means to return to ATO. If you require more buttons than can fit on one panel, use the Chain button function to chain only to other panels of the Close Screen type.
- Determine which job codes require access to the modified Close screen with the new panel appearing at the bottom.
- Create an event schedule to place the new customized panel on the modified Close screen and specify for which job codes the new customized panel is to appear. The new customized panel needs to appear at all times for an employee logged in under this job code when they are working with an order in the suspended state, so it is not necessary to end the event prior to the End-of-Day.

## 1. Creating a Close Screen panel

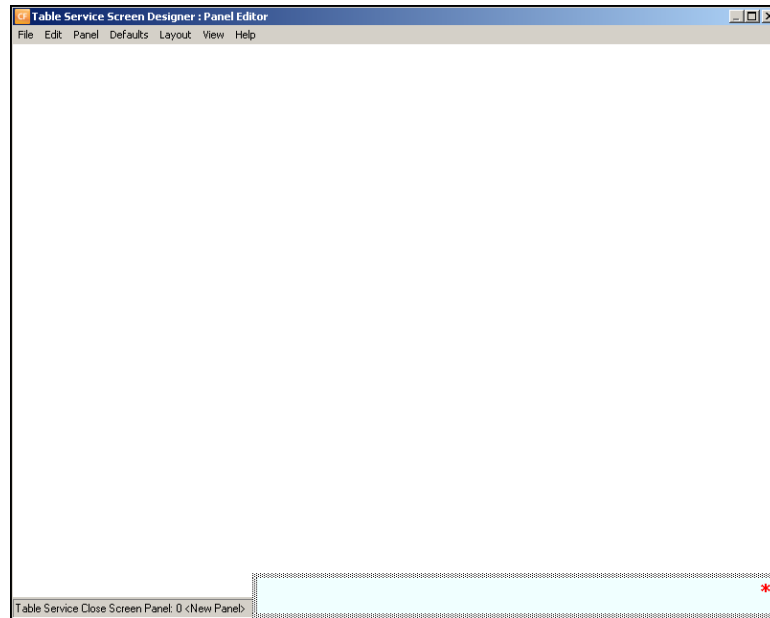


Figure 15 Customized Close Screen Panel

Access Maintenance > Screen Designer > Table Service Screen Designer > Work with Panels to create a custom panel. Select New Close Screen from the Panel menu bar. You can add any number of buttons to this panel; however, you cannot control the size of this panel or move the panel to another location on the screen. If you need more buttons than can fit on one panel, create multiple panels of the Close Screen type and use the Chain button function to move between them.

## 2. Adding buttons to a panel of the Close Screen type

You can add the following button functions to a panel of the Close Screen type:

- Add/Edit Gratuity
- Equal Pay
- Promo Lookup
- Surcharge Functionality
- Tax Exempt
- Chain (A Chain button on a panel of the Close Screen type only allows access to another panel of the Close Screen type.)
- Custom Activity (Only those currently supported by Aloha Takeout.)

### 3. To schedule the customized panel to appear on the Close Screen

Once you create the customized panel, the Activation Schedule and Event Schedule functions work together to establish for whom and when the customized panel is to appear on the Close screen. Use the 'Always' Activation Schedule to stipulate the event is to remain active until the End-of-Day occurs and a new business day starts, so that the customized panel appears at all times when the conditions are met. Use the 'Set Close Screen Panel' event to specify the customized panel is to appear only for an employee logged in as an ATO order taker. Refer to "Activating a Close screen panel" on page 93.

#### To schedule the customized panel to appear on the Close Screen.

1. Select **Maintenance > System Settings > Event Schedule**.
2. Select an existing Event Schedule, usually only one exists.
3. Select the **Events** tab.

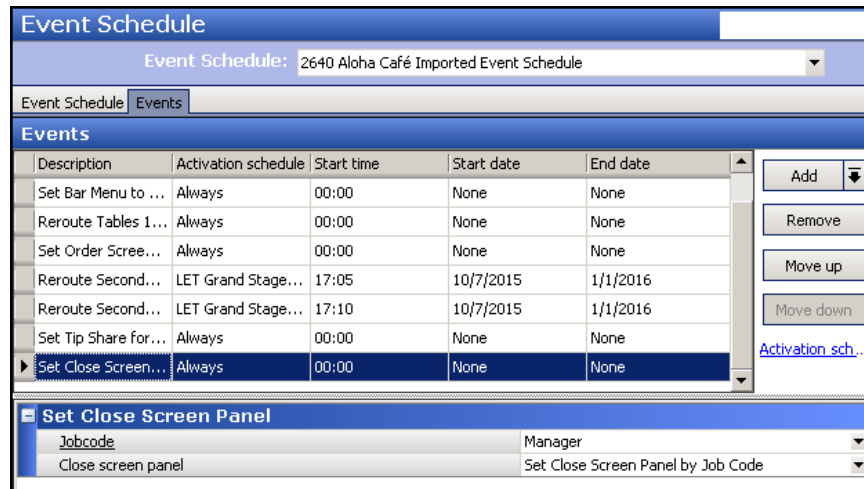


Figure 16 Event Schedule

4. Under the 'Events' group bar, click the **Add** drop-down arrow, select **Set Close Screen Panel**, and click **OK**.
5. Select the **activation schedule that begins at the desired start time** from the drop-down list. For example, 'Always.'
6. Under the 'Set Close Screen Panel' group bar, select a **job code**, such as 'ATO Order Taker,' from the drop-down list.
7. Select the **customized panel you created to appear in the bottom right corner of the Close screen from the 'Close screen panel'** drop-down list. For example, 'Close Screen for ATO Order Taker.'
8. Click **Save** and exit the **Event Schedule** function.

## Getting started

To get started, you must access Screen Designer and set the desktop resolution.

### Accessing the Screen Designer home screen

You access Screen Designer from the Maintenance menu.

Select **Maintenance > Screen Designer > Table Service Screen Designer**.

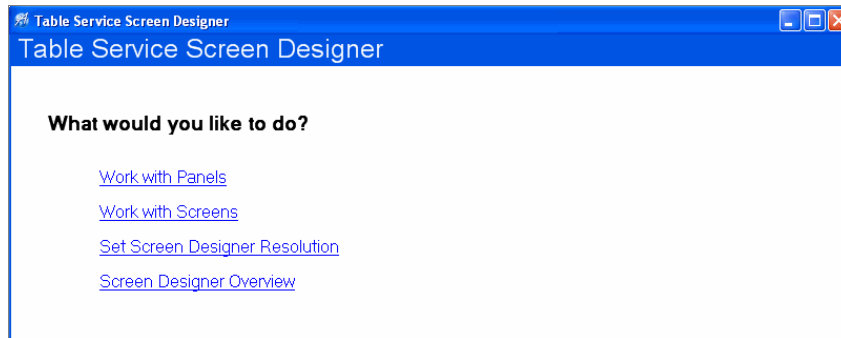


Figure 17 Screen Designer Home Screen

The home screen provides the following options:

- Work with Panels
- Work with Screens
- Set Screen Designer Resolution
- Screen Designer Overview

## Setting the desktop size for Screen Designer

The Set Screen Designer Resolution option on the Screen Designer home screen allows you to set a specific monitor screen resolution before you access Panel Editor.

We recommend you design in Panel Editor using the screen resolution that matches the POS terminals. This way, your panels and buttons display in design mode the way they will appear on the Aloha POS order entry screen in the restaurant.

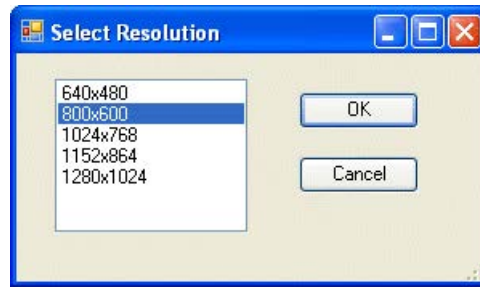


Figure 18 Screen Resolution Dialog Box

When you initially set the screen resolution, the system retains the resolution properties each time you access Screen Designer until you change to a different resolution. When you exit, screen resolution resets to a default of 800x600. The list of available screen resolutions are based on the specific computer used to access Table Service.

## Introducing Panel Editor

The Panel Editor environment contains specific tools that help you build and customize panels.

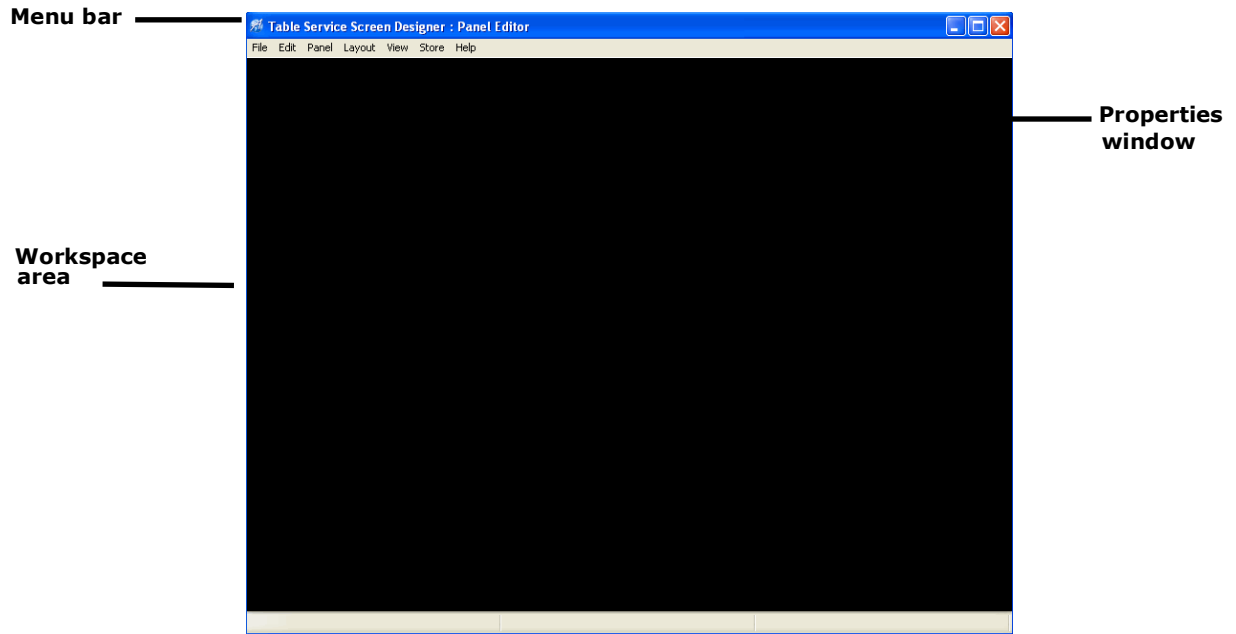


Figure 19 Panel Editor Screen

### Menu bar

The menu bar contains the following menus you need as you build panels in Panel Editor:



Figure 20 Panel Editor Menu Bar

**File** — Enables you to exit Panel Editor and return to the Screen Designer Home screen, exit the application, or switch to Screen Editor.

**Edit** — Enables you to perform basic edit functions, such as Undo, Redo, Cut, Copy, Paste, and Select All.

**Panel** — Enables you to open, add, and manage panels and buttons.

**Layout** — Enables you to control the alignment, size, and spacing of buttons on a panel.

**View** — Enables you to show or hide the Properties window, select a color scheme (Skins) for panels and buttons, as well as set your current color selections as the default skin.

**Help** — Enables you to get online Help for Screen Designer and Panel Editor, as well as product version information.

## Workspace area

The workspace, the black area of the Panel Editor screen, is the region where you draw your panels and panel elements to build the components of a screen. The size of the workspace is determined by the resolution of the desktop.

## Panel Properties window

The Panel Properties window lists the current properties for a selected panel. This window appears automatically, so you can quickly view or make changes to a panel. For example, if you click in a panel, the Properties window displays the settings for the selected panel, including the title, font, color, ID number, location, size, and much more. To close the Properties window, click **Close (X)**.

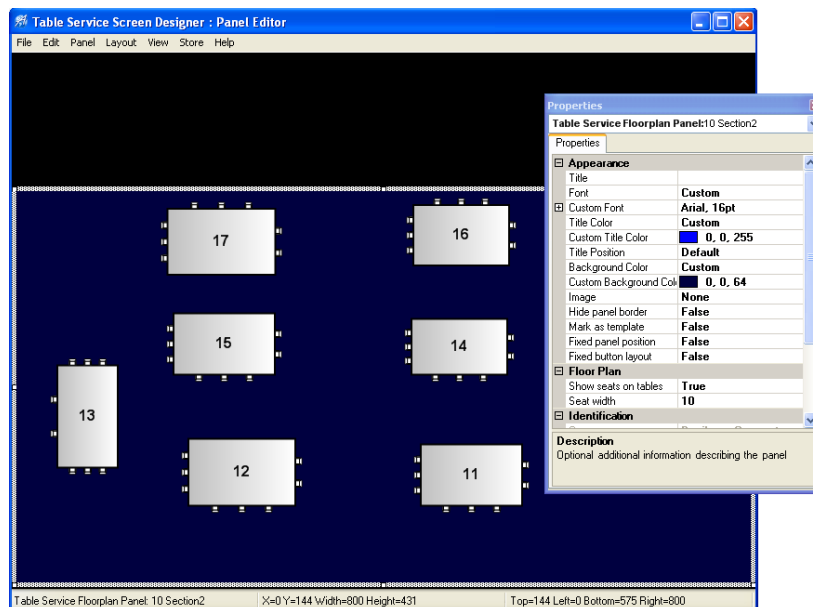


Figure 21 Example Properties Window for a Panel

### To navigate the Properties window:

1. Select the **panel** whose properties you want to display. The properties are sorted by group. For example, the 'Appearance' group bar includes the Font, Background Color, and Image properties, to name a few.
2. Collapse the **group bar list** so that you can see the group names only, or expand a **group bar**, to view the properties within that group. When you expand or collapse the list, you see a plus (+) icon or minus (-) icon to the left of the group name.
3. Use the **scroll bar** on the right side of the Properties window to navigate up and down the various panel properties.

#### Tip

To move the Properties window around in your workspace area, click the title bar, hold the left mouse, and drag the window to the location you prefer. To resize, move your mouse to the edge of the window until you see double-sided arrows, then hold the left mouse and drag the window border to the size you prefer.

### To change the value of a property:

1. Select the **property** in the left column.
2. Change the **value** of the property in the right column.

#### Tip

If a property has a predefined set of values, a down arrow appears in the right column of the property. Click in the right column of the property, then select a value from the drop-down list. If a property has an additional dialog box to complete, an ellipses button (...) appears. Click the ellipses button (...) to display the dialog box.

## Undoing and redoing changes in Panel Editor

If you make a mistake or change your mind, Panel Editor provides an undo option for the previous actions you performed. You can undo most actions, up to the last save. And if you change your mind about undoing an action, you can use Redo. After you save changes, the Undo/Redo options reset.

### To undo a command:

Select **Edit > Undo** from the Panel Editor menu bar.

**-or-**

Press **Ctrl+Z** on the keyboard.

### To redo a command:

Select **Edit > Redo** from the Panel Editor menu bar.



-or-

Press **Ctrl+Y** on the keyboard.

## Opening and closing Panel Editor

You access Panel Editor through the Screen Designer home screen. After you save your panels, you can close Panel Editor at any time and return to the main screen.

### To open Panel Editor:

1. Select **Maintenance > Screen Designer > Table Service Screen Designer** from the menu bar. The Screen Designer home screen appears.
2. Click **Work with Panels**. The Panel Editor screen appears with the Properties window displayed.

### To close Panel Editor:

1. Select **File > Close Panel Editor** from the Panel Editor menu bar.

-or-

Click **Close (X)**.

-or-

Press **Ctrl+F4**.

2. If a confirmation message appears for you to save panels, select the desired option. The system returns to the main screen.



### Tip

You can also switch to Panel Editor while in Screen Editor. Select **File > Panel Editor** from the Screen Editor menu bar.



### Caution

Always save your panels before you close Panel Editor. An asterisk \* on a panel indicates the panel is not saved. To save a panel, right-click the panel and select **Save Panel**, or select **Panel > Save All Panels** from the Panel Editor menu bar.

## Changing the default owner of a panel

If you manage multiple sites using CFC, the owner of a panel determines who can view and edit a panel, as well as the stores that receive the panel in their database.



### Reference

To learn more about ownership, see [Understanding owners in Screen Designer](#).

### To set the default owner of a panel:

1. Select **Defaults > Make default panel**. The New Panel Options dialog box appears.
2. Select the default **owner** you want to assign to any new panels you create from this point forward.
3. Click **OK**. The selected owner remains in effect for all new panels you create, until the next time you change the default owner.



### Caution

You cannot change the owner after you create a new panel; therefore, if you need to change the owner assigned to new panels you create, change the default owner before you begin creating new panels.

## Working with panels

The Panel Editor tool enables you to build the various panels or sections needed for your Aloha POS screens. Panel Editor includes easy-to-use features that assist you with the panel building process.

There are a few concepts and features to know about when you work with panels in Panel Editor.

### Understanding panel ownership

If you manage multiple sites using CFC, when you create panels in Panel Editor, you assign an owner to each panel. The owner determines who can view and make changes to the panels in the database, as well as which store locations receive the panels in their local database.

For example, if you want the same order entry panel available at all store locations, no matter if they are corporate- or franchisee-owned stores, you assign an owner whose owner type is 'global.' If you want the panel at corporate-owned stores only, you assign an owner whose owner type is 'corporate.' And if you want the panel to appear at a specific store, you assign the specific store as owner of the panel.



#### Reference

If you manage multiple sites using CFC, refer to [Understanding owners in Screen Designer](#) for more information about how ownership works in Configuration Center.

### Understanding panel types

You design each panel for a specific function and purpose. Although you can create as many panels, as necessary, these types of panels are available for you to use in Panel Editor:

**Dashboard Panel** — Displays a panel that allows you to view and identify key performance indicators (KPIs) and other vital statistics. Access a dashboard and view these key metrics quickly and easily, either by displaying a dashboard in place of the floating logo, or on demand by touching a button. A dashboard compiles information from different types of reports into one interface, proving you with actionable information distilled into easy to read components for decisive action on the restaurant floor.



#### Reference

Refer to the [Dashboard Feature Focus Guide - HKS323](#) for more information on configuring and using this feature.

**Order Entry Panel** — Enables you to replace and add items to the Action Item area of the order entry screen. The order entry panel has a fixed position on the order entry screen, in the bottom right portion of the screen. You can create multiple panels, and then use chain buttons to link to other order entry panels in the same position.

**Floor Plan Panel** — Enables you to build a layout, or floor plan of a restaurant, including the walls and furniture. You can create a different panel for each section of the restaurant. You can also use a floor plan panel to add certain types of function buttons, such as open drawer, view tables, sales summary, and more.

**Modifier Panel** — Enables you to overlay the modifier button area of the classic modifier screen with a custom Modifier panel. Use when entering items sold in large quantities, such as '50 Wings,' where you must enter 50 wing modifiers to complete the item. From this panel, you can perform all existing functions, such as ordering, clearing, and deleting modifiers, enforcing minimum, maximum, and free restrictions, as well as applying modifier codes to the modifier.

**Submenu Panel** — Enables you to customize the Submenu area of the order entry screen with special function buttons, such as Smart Item and Smart Select, as well as apply bitmaps and color to the Submenu area, if desired.

**Close Screen Panel** — Allows you to customize the buttons that appear on the bottom of the Close screen just like you can customize the buttons that appear on the bottom of the order entry screen. You control the display of the Close Screen panel type by job code and activation/event schedules. New button functions allow you to replace the standard hard-coded buttons that appear in this location on the original Close screen, such as Tax Exempt and Add/Edit Gratuity. We also added the ability to add ATO custom activity interface button functions, such as FLEX\_ENTRY\_COMPLETE, to this panel type, so that you can confirm an ATO order from the Close screen and return to an ATO screen, such as the Lookup screen. You can use one or more 'Chain' buttons to link multiple panels of the Close Screen type together.

### Establishing panel name and number conventions

We recommend you establish a naming convention for the panels, to avoid confusion when accessing panels. Abbreviate the panel name as much as possible and make it descriptive of the function it performs. When dealing with multiple concepts that use different panels, always enter a preceding indicator, or prefix, such as Sec1 for Section 1, or MGR for Manager. This technique groups panels together when they appear on various screens.

We also recommend you utilize an effective numbering scheme that helps categorize your panels, as well as place them in a logical order.

### Understanding panel versioning

If you manage multiple sites using CFC, 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.

Most of the panels you create are probably used at all store locations; however, when some of your stores may need to offer different options on their order entry screens, you can use versioning to support those variations at each store.

Use the 'New Panel Version' option in Panel Editor to create a version of an existing panel.

A version of a panel is a composite of the primary panel, except for the few changes made to the panel that a single store or group of stores may need. The version panel is not a standalone panel; it shares the identity of the primary panel. The panel version overrides its primary panel based on the start and end dates of the version panel (i.e., scheduled versioning). If there are multiple versions of a primary panel, the most restrictive version takes precedence. For example, a panel version for a single store overrides a panel version for a group of stores, as long as the activation dates for the panel version are valid.

## What you can do with panels

### Adding a panel

You must add a panel to the workspace before you can add buttons and images to the panel. You assign a name and number to each panel, and all panels have a Title property in the Properties window. It is optional to add a title to a panel. The title text appears at the top in a system-generated portion of the panel and you can modify the font and color of the title text, as well as the color and other attributes of a panel, through the Properties window.

#### To add a panel:

1. Select **Panel** from the menu bar, then select one of the following menu options:

**New Dashboard Panel** — Displays a panel that allows you to view and identify key performance indicators (KPIs) and other vital statistics. Access a dashboard and view these key metrics quickly and easily, either by displaying a dashboard in place of the floating logo, or on demand by touching a button. A dashboard compiles information from different types of reports into one interface, proving you with actionable information distilled into easy to read components for decisive action on the restaurant floor.

**New Order Entry Panel** — Enables you to replace and add items to the Action Item area of the order entry screen. The order entry panel has a fixed position on the order entry screen, in the bottom right portion of the screen. You can create multiple panels, and then use chain buttons to link to other order entry panels in the same position.

**New Floor Plan Panel** — Enables you to build a layout, or floor plan of a restaurant, including the walls and furniture. You can create a different panel for each section of the restaurant. You can also use a floor plan panel to add certain types of function buttons, such as open drawer, view tables, sales summary, and more.

**New Submenu Panel** — Enables you to build panels to replace the standard submenu area of the order entry screen. Use submenu panels when you want to use smart item and smart select buttons, panel images, such as a store logo, or when you want to apply a special background color to the submenu area of the order entry screen.

**New Close Screen Panel** — Enables you to customize the buttons that appear on the bottom of the Close screen just like you can customize the buttons that appear on the bottom of the order entry screen. You control the display of the Close Screen panel type by job code and activation/event schedules. New button functions allow you to replace the standard hard-coded buttons that appear in this location on the original Close screen, such as Tax Exempt and Add/Edit Gratuity. We also added the ability to add ATO custom activity interface button functions, such as FLEX\_ENTRY\_COMPLETE, to this panel type, so that you can confirm an ATO order from the Close screen and return to an ATO screen, such as the Lookup screen. You can use one or more 'Chain' buttons to link multiple panels of the Close Screen type together.

The selected panel appears on the workspace and default properties for the panel appear in the Properties window.

2. Move the **panel** to the desired location on the workspace area, and resize, as necessary.



**Note**

You cannot modify the position of the Order Entry Submenu panels.

3. Locate the **Identification** group bar on the Properties window.
4. Click the **left column** of the 'Number' property and assign a **panel number** in the right column.

**-or-**

If you want the system to assign a number to the panel:

- a. Click the **ellipses button (...)**. The Number Assignment dialog box appears.

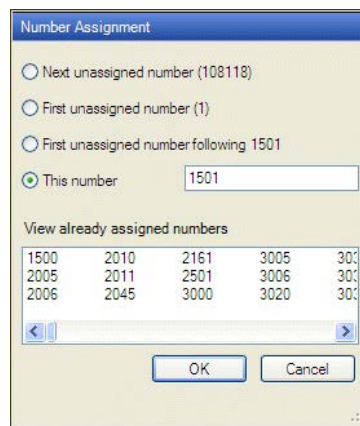


Figure 22 Number Assignment Dialog Box

- b. 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. Type a **name** for the panel. The name identifies the purpose of the panel, such as Main Floor, Section 2, Sandwiches, Manager Functions, and Tenders, to name a few.
6. Type a general **description** for the panel.
7. Complete the additional **options** for the panel, as necessary.
8. Select **True** from the 'Context Panel' drop-down list, if you are creating a context panel.



#### Reference

Refer to the [Context Panels Feature Focus Guide - HKS346](#) for more information on configuring and using this feature.



#### Reference

There are additional properties you can modify for a panel. Refer to the following procedures for more information:

Setting panel properties

[Adding a title to a panel](#)

[Adding an image to a panel](#)

[Changing the color of a panel](#)

9. Select **Panel > Save Panel** from the Panel Editor menu bar.  
**-or-**  
Right-click the **panel** and select **Save Panel**.



#### Caution

An asterisk \* on a panel indicates the panel is not saved. To save a panel, right-click the panel and select Save Panel, or select Panel > Save All Panels from the Panel Editor menu bar.

## Opening a panel

You can quickly locate and open an existing panel from the Panel Editor menu bar.

### To open a single panel:

1. Select **Panel > Open Panel** from the Panel Editor menu bar. The Open Panel dialog box appears.
2. Select the desired **panel** and click **OK**.

**-or-**

Double-click the desired **panel**.

The selected panel appears on the Panel Editor workspace.

### To open all panels for a specific screen:

1. Select **Panel > Show All Panels for Screen** from the Panel Editor menu bar. The Select Screen dialog box appears.
2. Select the desired **screen** and click **OK**.

**-or-**

Double-click the desired **screen**.

All panels assigned to the selected screen appear on the Panel Editor workspace.

## Setting panel properties

You can define the parameters of a panel using the Properties window. This procedure provides the general steps for setting panel properties.

### To set the properties for a panel:

1. Select or open the **panel** for which you want to set properties.
2. In the Properties window, locate the **property** you want to change.
3. Click in the **left column** of the property and in the right column, change the **text** or select a **value** from the drop-down list.



### Tip

If a property has an additional dialog box for you to complete, an ellipses button (...) appears in the right column of the property. Click the ellipses button (...) to display the dialog box.

4. Repeat steps **2** and **3** until you finish making changes to the applicable properties, as necessary. The changes apply to the panel immediately.
5. Select **Panel > Save Panel** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **Save Panel**.



## Adding a title to a panel

You can add a title to a panel and the title appears on the POS terminal. If the title is left blank, the panel appears without a title border.

### To add a title to a panel:

1. Select or open the **panel** for which you want to add a title.
2. Locate the **Appearance** group bar in the Properties window.
3. Click the **left column** of the 'Title' property and in the right column, type a **title** for the panel. The title appears at the top of the panel.
4. Select the desired **font**.

**-or-**

If you want a custom font:

- a. Select **Custom** from the 'Font' drop-down list. The Custom font property appears under the Font property.
- b. Click in the **Custom font property**, then click the **ellipses button (...)**. The Font dialog box appears.

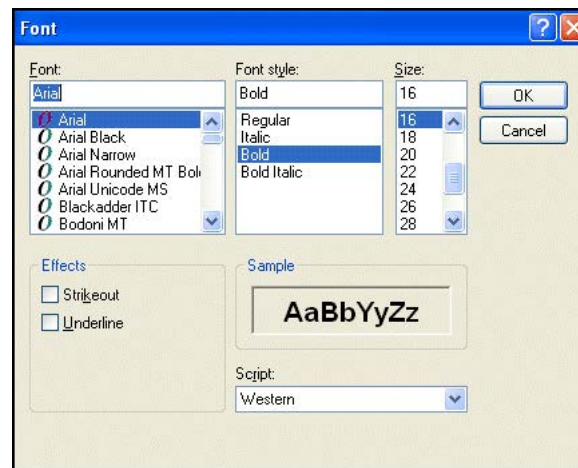


Figure 23 Font Dialog Box

- c. Select a **font**, **font style**, and **size**, then click **OK**.
5. Select the desired **color**.
- or-**
- If you want a custom color:
- a. Select **Custom** from the 'Title Color' drop-down list. The Custom Title Color property appears under the Title Color property.

- b. Click in the **Custom Title Color** property, then click the **down arrow**. A list of available custom colors appears.
- c. Select a **color** from the 'Custom,' 'Web,' or 'System' tab.
- d. Select the desired **title position**.

 **Tip**

Another technique to add a title to a panel is to leave the 'Panel Title' property blank, add a new button on the panel, and assign the title to the button; however, do not assign a function to the button, as it is for title purposes only.

## Hiding a panel border

You can display panels with or without borders. Quite often, screens are created with all panel borders hidden, to create a seamless screen effect on the POS terminal.

### To hide a panel border:

1. Select or open the **panel** for which you want to hide the border.
2. Locate the **Appearance** group bar in the Properties window.
3. Select **True** from the 'Hide panel border' drop-down list.



### Note

When you hide the panel border, the panel title does not appear on the panel.

## Adding an image to a panel

You can add bitmap images to the background of a panel. Select an image from the list of graphics preloaded into the database. An image must be uploaded using the Media Files function, before you can select it from the image list.

### To add an image to a panel:

1. Select or open the **panel** to which you want to add an image.
2. Locate the **Appearance** group bar in the Properties window.
3. Select the **Image drop-down list** and choose a standard graphic.

-or-

If you want a custom image:

- a. Select **Custom** from the Image drop-down list. The Custom image property appears under the Image property.
  - b. Click the **Custom drop-down list**, and then double-click the desired graphic.
4. Select a desired **image layout**.
  5. Select the **transparency** of the image. **Note:** This option is available for custom images only.

## Changing the color of a panel

When you create panels for your screens, it is often necessary to apply a different color to a panel.

### To change the color of a panel:

1. Select or open the **panel** for which you want to change the color.
2. Locate the **Appearance** group bar in the Properties window.
3. Select the desired **background color**.

-or-

If you want a custom color:

- a. Select **Custom** from the 'Background Color' drop-down list. Additional properties appear under the Background Color property.
- b. Click in the **Custom Background Color** property, then click the **down arrow**. A list of available colors appears.
- c. Select a **color** from the 'Custom,' 'Web,' or 'System' tab. The color appears on the selected panel.

## Moving a panel

You can move a panel to a desired location on your workspace. You can move one panel at a time only. There are multiple ways to move a panel.



### Tip

Before you can move an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To move a panel using the Properties window:

1. Select or open the **panel** you want to move.
2. Locate the **Location** group bar in the Properties window.
3. Adjust the **X** and **Y** properties to modify the location of the panel.

### To move a panel using the mouse:

Move your **mouse** to the edge of the panel until you see four arrows, then hold the left mouse and drag the panel to the location you prefer.

### To move a panel using the keyboard:

Select the **panel** you want to move and press the appropriate **up**, **down**, **left**, or **right arrow** on the keyboard to move the panel to the location you prefer.

## Resizing a panel

You can change the size of a panel, as necessary. You can resize one panel at a time only. There are multiple ways to change the size of a panel.



### Tip

Before you can resize an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To resize a panel using the Properties window:

1. Select or open the **panel** you want to resize.
2. Locate the **Size** group bar in the Properties window.
3. Adjust the **Width** and **Height** properties, to modify the size of the panel.

### To resize a panel using the mouse:

Move your **mouse** to the border handle of the panel until you see a double-sided arrow, then hold the **left mouse** and drag the **panel border** to the size you prefer.

## Copying a panel

Use the Duplicate Panel option to create a copy of a panel. A copy of a panel inherits all the properties of the original panel, such as name, appearance, template settings, text and color selections, size and location, as well as all button functions. When you copy a panel, the new panel appears on top of the original panel.

If you are a CFC user, you can create a copy of a corporate-owned panel or a store-owned panel. You must assign an owner to each copy you create; however, copies of store-level panels are automatically owned by the store.



### Caution

A copy of a panel cannot have the same name as the original panel.

### To copy a panel:

1. Select or open the **panel** you want to copy.
2. Select **Panel > Duplicate panel** from the Panel Editor menu bar. The copied panel appears on top of the original panel. If you are CFC user, select the appropriate **owner** for the copied panel and then click **OK**. **Tip:** You can also right-click a **panel** and select Duplicate Panel.
3. Move the **panel** to a location you prefer on the workspace area, and resize, as necessary.
4. Locate the **Identification** group bar on the Properties window.
5. Click the **left column** of the 'Number' property and assign a panel **number** in the right column.

**-or-**

If you want the system to assign a number to the panel:

- a. Click the **ellipses button (...)**. The Number Assignment dialog box appears.
- b. 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.
6. Type a **name** for the panel. The name identifies the purpose of the panel, such as Main Floor, Section 2, Sandwiches, Manager Functions, and Tenders, to name a few.
  7. Type a general **description** for the panel.
  8. Complete the additional **options** for the panel, as necessary. A description of each Property window option is available in "Appendix A: Properties window descriptions."



### Reference

There are additional properties you can modify for a panel. Refer to the following procedures for more information:

[Setting panel properties](#)

[Adding a title to a panel](#)

[Adding an image to a panel](#)

[Changing the color of a panel](#)

9. Select **Panel > Save Panel** from the Panel Editor menu bar.

### Locking a panel in place

After you are finished working with a panel, including the buttons on the panel, you can lock the position of the panel and buttons. This way, the panels and buttons remain in the desired location.

#### To lock a panel in place:

1. Select the **panel** you want to lock.
2. Locate the **Appearance** group bar in the Properties window.
3. Select **True** from the 'Mark as template' property drop-down list. The 'Fixed panel position' and 'Fixed button layout' properties automatically set to 'True.'

**-or-**

Select **True** from the 'Fixed panel position' drop-down list, if you want to lock only the panel in place.

**-or-**

Select **True** from the 'Fixed button layout' drop-down list, if you want to lock only the buttons in place.

**Tip**

We recommend you set the 'Mark as template' to True on all completed panels, to prevent accidental changes to the panel. Do not set this property to True until the panel is complete; otherwise, you cannot continue to make changes to the panel.

### Creating a version of a panel

If you manage multiple sites using CFC, create a version of a panel when you need to accommodate menu variations, such as a special menu item button or a store-specific promotion for one or more stores. You create a version of a panel from the existing 'primary' panel.

#### To create a version of a panel:

1. Open the **panel** you want to version.
2. Select **Panels > New Panel Version** from the Panel Editor Main menu. The Select Panels option appears. **Tip:** You can also right-click a panel and select New Panel Version.
3. Open the **panel** for which you want to create a version. The primary panel appears.
4. Click **Version**.The Version Assignment dialog box appears.
5. Select from **one** of the following options:

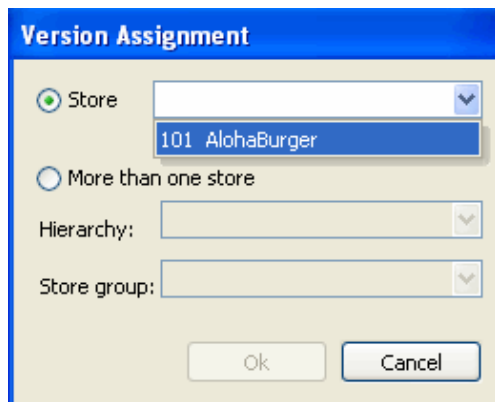


Figure 24 Version Assignment Dialog Box

- **Store** - Allows you to assign the version to a specific store. Click the **drop-down list** to select a 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.

6. Click **OK**. New information for the version appears in the Properties window.

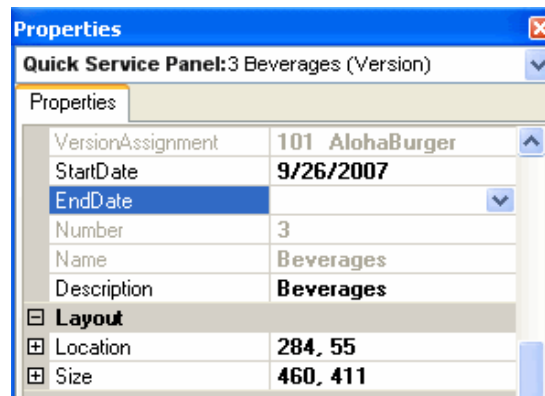


Figure 25 Version-Related Properties

7. Locate the **Identification** group bar. The 'Record number' and 'Name' options are the same as the primary panel. A 'Version assignment' option appears, which displays the store, or store group/hierarchy combination you selected.
8. Select a **Start date** to indicate the first day you want the version active at the store.
9. Select an **End date** to indicate the last day you want the version active at the store.
10. Assign a **Description** to the version panel that indicates the purpose of the panel.
11. 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.
12. Select **Panel > Save Panel** from the Panel Editor menu bar.

### Saving a panel

Anytime you are working with a single panel or elements on a panel, you should save the panel as often as necessary. When you are working with multiple panels at a time, it is easier to save all panels at one time, than it is to save each panel individually.



#### Caution

An asterisk \* on a panel indicates the panel is not saved.

#### To save a panel:

1. Open the **panel** you want to save.
2. Select **Panel > Save Panel** from the Panel Editor menu bar.

-or-



Right-click the **panel** and select **Save Panel**.

**To save all panels on a screen:**

- Select **Panel > Save All Panels** from the Panel Editor menu bar.
- or-
- Right-click in an **empty area** of the workspace and select **Save All Panels**.

### Closing a panel

If you do not need a panel to appear on the workspace, you can close the panel, as necessary. When you are working with multiple panels at a time, it is easier to close all panels at one time, than it is to close each panel individually.

**To close a panel:**

1. Open the **panel** you want to close.
  2. Select **Panel > Close Panel** from the Panel Editor menu bar.
- or-
- Right-click the **panel** and select **Close Panel**.

**To close all panels on a screen:**

Select **Panel > Close All Panels** from the Panel Editor menu bar.

-or-

Right-click in an **empty area** of the workspace and select **Close All Panels**.

### Deleting a panel

You can delete a panel, if it is not currently assigned to a screen.

**To delete a panel:**

1. Open the **panel** you want to delete.
  2. Select **Panel > Delete Panel** from the Panel Editor menu bar.
- or-
- Right-click the **panel** and select **Delete Panel**.
- A confirmation message box appears.
3. Click **OK** to confirm the deletion.

## Working with buttons on a panel

Buttons are objects you place on a panel that perform specific functions or enhance the appearance of a panel. An element can range from buttons and images to recipes and instructional videos.

Below are descriptions of the panel elements you can work with in Panel Editor.

### Understanding button types

The buttons you place on a panel enable you to perform the POS functions needed for your restaurant. Each button in Screen Designer performs a different function on the POS terminal. You use only the buttons you need in your operation. Although each button serves a different purpose, there are some common elements that enable us to group button functions into the following categories:

- **Order entry functions** - Indicates these buttons are most likely used on menu, check function, or operations panels. Examples include: Combine Order, Delivery, Get Check, New Order, Order Item, Reprint Check, and more.
- **Employee functions** - Indicates these buttons are most likely used on employee-related panels. Examples include: Clock In/Out, Checkout, Change Password, Fingerprint Scanner Enroll, and more.
- **Manager functions** - Indicates these buttons are most likely used on manager-related panels. Examples include: Allow Clock In, Assign Drawer, Clear Password, Release Locked Employee, and more.
- **Tender functions** - Indicates these buttons are most likely used on payment-related panels. Examples include: Adjust Payment, Script, Promo, Refund, and more.
- **System functions** - Indicates these buttons are most likely used on system-related panels, or when you interface with external systems and devices. Examples include: Calibrate, End of Day, PMS Inquire, Reroute Video, Shutdown Terminal, and more.

### Tables, walls, and bitmaps

In addition to adding buttons, you can also add tables, walls, and bitmaps to a panel. Tables and Walls are used in the Floor Plan feature to build a layout of your restaurant. The Bitmap is available for Floor Plan panels, as well as Order Entry and Submenu panels.

### Understanding button Properties window

The Properties window lists the current properties for selected panel elements, such as buttons and images. This window appears automatically, so you can quickly view or make changes to the selected element. To close the Properties window, click **Close (X)**.

If you click a button, the Properties window displays the settings for the selected button, including the button text, color, action, and much more. When you select multiple panel elements, such as multiple buttons, the Properties window displays only those properties that are common to all the selected

elements. The Button Properties window also enables you to assign an action, or function to a button, which is necessary for the button to operate properly on the POS terminal.

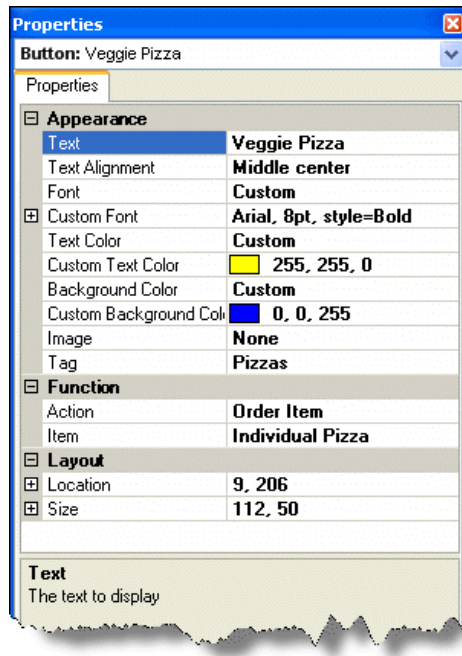


Figure 26 Example Properties Window for a Button



#### Tip

Use the Button Properties window in the same manner as the Panel Properties window.

### Understanding button tags

As you add buttons to panels, you may have certain buttons that do 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.

To activate and deactivate a button on a panel, you have to set an Activate Panel Button event using the Event Schedules function. If you have many buttons that have to be activated and deactivated, the task to set an event for each individual button can be tedious.

The system offers a way for you to activate and deactivate several buttons at one time. The Tags function enables you to create groupings, to which you can assign buttons of like properties. For example, if you have other winter beverages in addition to the pumpkin spice latte example, you

might create a Tag grouping 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.

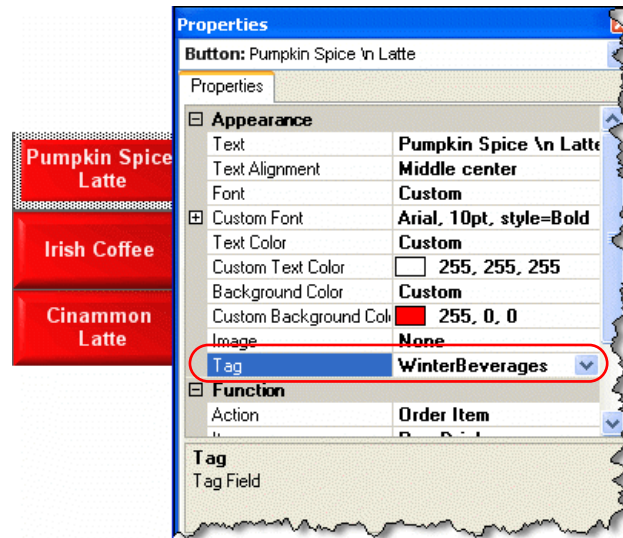


Figure 27 Example of a Beverage Button Associated to a Tag

When you set an event to activate or deactivate the winter beverages, for a particular reason, you need only set one event for the Winter Beverages tag, and each beverage button associated to that tag will activate or deactivate appropriately.

Considering a button must be associated with a tag before you can activate and deactivate it as part of a tag group, it is best practice, and easier, to associate a button to a tag when you add the button to a panel. However, this feature is not just for new buttons; you can associate an existing button to a tag at any time.

## Understanding the button grid tool

The button grid streamlines and simplifies the process of organizing and resizing multiple buttons to an almost effortless task. This feature helps you make layout changes to your buttons while keeping each button stationary, aligned, and evenly spaced.

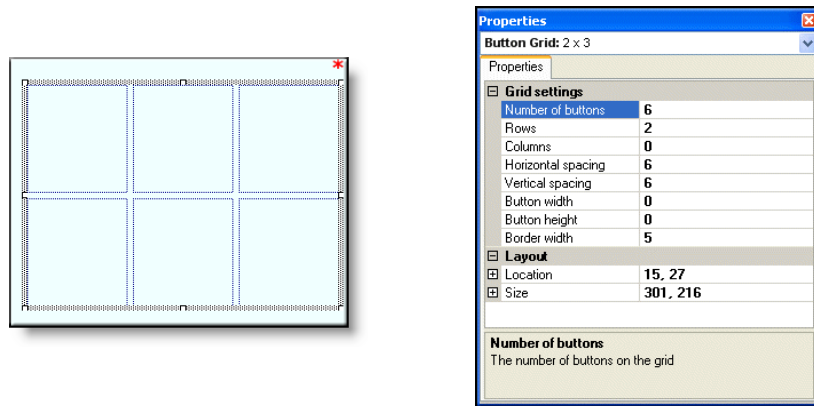


Figure 28 Button Grid and Corresponding Properties

Use the 'New Button Grid' option to lay out a grid on your panel, then use the Properties window to specify the number of buttons and the dimensions of the grid, including spacing and border options. When you have the number of buttons laid out the way you want on the panel, use the 'Fill Grid with Buttons' option to make buttons appear on the panel, within the area indicated by the grid. When you are finished with the grid, select an edge of the grid and press Delete to remove it from the panel. The buttons remain in place on the panel.

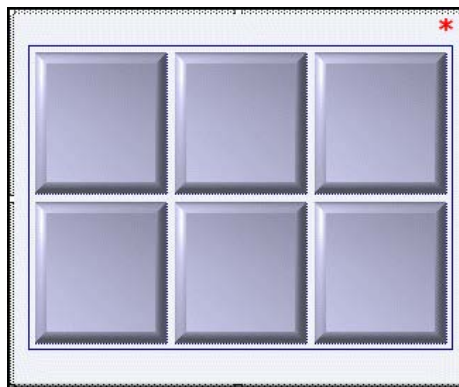


Figure 29 Button Grid Filled with Buttons

As you add buttons to the grid, the buttons within the grid area resize to allow space for the new buttons. If you delete one or more buttons from within the button grid area, you can use the 'Consolidate Buttons' option and the 'Sort' options to reorganize the remaining buttons, starting from the top left corner of the button grid.

If you have existing buttons you want to move, resize, or realign, you can select two or more buttons and use the 'Convert to Grid' option to place a grid around the selected buttons and make changes, as needed.

The following lists the common actions you can perform on a button grid:

If you want to...	Do this...
Add a grid to a panel.	Right-click in the <b>panel</b> and select <b>New button grid</b> .
Remove a grid from the panel.	Select the <b>grid</b> and press <b>Delete</b> to remove it from the panel.
Add a grid around existing buttons.	Select the <b>buttons</b> you want to include in the grid, right-click, and select <b>Convert to Grid</b> .
Indicate the number of buttons in a grid.	Select the <b>grid</b> and in the Properties window, enter a value for the <b>Number</b> property.
Fill a grid with buttons.	Right-click the <b>grid</b> and select <b>Fill grid with buttons</b> .
Add a button to a grid.	Click a <b>button</b> outside the grid, then drag and drop it to the location you prefer, inside the grid.
Rearrange buttons inside a grid.	Click the <b>button</b> you want to rearrange and drag it to the location you prefer, inside the grid.
Add rows or columns to a grid.	Select the <b>grid</b> and in the Properties window, enter a value for the <b>Row</b> or <b>Column</b> property.
Move a grid.	Move your <b>mouse</b> to the edge of the grid until you see four arrows, then hold the <b>left mouse</b> and drag the <b>grid</b> to location you prefer.
Resize a grid.	Move your <b>mouse</b> to the border handle of the grid until you see a double-sided arrow, then hold the <b>left mouse</b> and drag the <b>grid border</b> to the size you prefer.
Consolidate scattered buttons in a grid.	Right-click the <b>grid</b> and select <b>Consolidate buttons</b> .
Sort buttons by button text.	Right-click the <b>grid</b> and select <b>Sort buttons horizontally</b> or <b>Sort buttons vertically</b> .
Remove a button from the grid.	Select the <b>button</b> you want to remove and press <b>Delete</b> .

## Understanding the button lasso tool

You can select, or lasso, multiple buttons on a panel, to move, resize, or change the properties of the buttons all at one time.

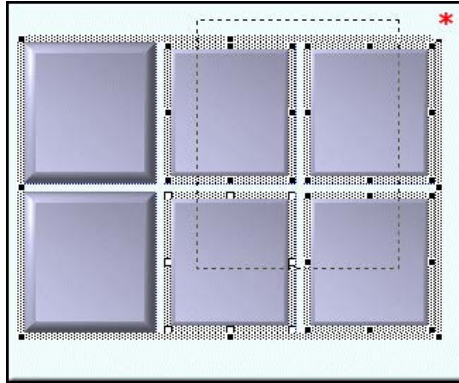


Figure 30 The Lasso Tool with Four Buttons Selected

### To select multiple buttons on a panel using the lasso:

- With the desired panel active, press and hold the **Shift key** and drag the mouse over the buttons you want to select.
- or-
- With the desired panel active, click in an **empty area of the panel**, then drag the **mouse** over the buttons you want to select. A border appears around each selected button.

## What you can do with buttons

You can do the following things with buttons:

### Adding a basic button

You can place one or more rectangular buttons on the panels you plan to use on the POS terminal. Buttons are always placed on panels, and you can define the size, shape, color, text, and position of a button, as well as the function, or behavior, of the button.



#### Tip

Before you can add buttons to an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

There are multiple ways to add buttons to a panel. You can add buttons one at a time or add multiple buttons all at one time. The following procedures explain how to add a basic button to a panel.

### To add a single button to a panel:

1. Click inside the selected **panel**.
2. Select **Panel > New Button** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **New Button**.

A blank button appears on the workspace and default properties for the button appear in the Properties window.

3. Locate the **Function** group bar in the Properties window.
4. Select the desired **button function** from the 'Action' drop-down list. Additional properties may appear under the 'Function' group bar that you need to complete for the button.

A complete list of button function descriptions are available in [Appendix B: Button function descriptions](#).

5. Locate the **Appearance** group bar in the Properties window.
6. Change the **Text** option, if you want a different button name to appear on the button.
7. Modify any additional **properties** for the button, if needed.
8. Select **Panel > Save Panel** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **Save Panel**.



### Reference

There are additional properties you can modify for the selected button. Refer to the following procedures for more information:

[Changing the color of a button](#)

[Changing the font of a button](#)

[Adding an image to a button](#)

[Resizing a button](#)

[Moving a button](#)

[Aligning and spacing a group of buttons](#)

[Sorting a group of buttons](#)

### To add multiple buttons to a panel:

1. Click inside the selected **panel**.
2. Select **Panel > New Button Grid** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **New Button Grid**.



The grid appears in the middle of the panel.

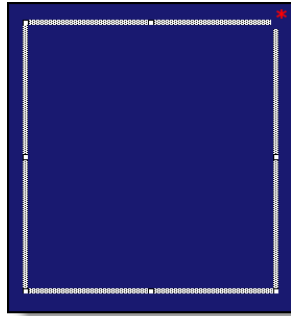


Figure 31 Button Grid without Buttons Filled In

3. Move and resize the **button grid** to match where you want buttons to appear on the panel.

 **Tip**

To move the button grid, click the grid and drag it to the location you prefer. To resize the button grid, move your mouse to the border handle of the grid until you see double-ended arrows, then hold the left mouse and drag the grid border to a size you prefer.

4. Locate the **Grid settings** group bar in the Properties window.
5. Type the **Number of buttons**. The button grid displays lines to indicate the number and size of the buttons.
6. Right-click inside the **button grid** and select **Fill grid with buttons**. The grid fills in with the specified number of buttons and default properties, for the last button added, appear in the Properties window.

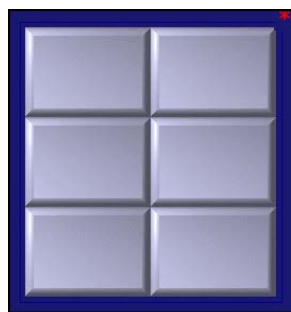


Figure 32 Button Grid with Buttons Filled In

 **Tip**

If desired, you can keep the button grid in place until you are finished modifying the layout of the buttons, as well as the properties of each button.

7. Select a **button**, and then locate the **Functions** group bar in the Properties window.
8. Select the desired **button function** from the 'Action' drop-down list. Additional properties may appear under the 'Function' group bar that you need to complete for the button.  
A complete list of button function descriptions are available in [Appendix B: Button function descriptions](#).
9. Locate the **Appearance** group bar in the Properties window.
10. Change the **Text** option, if you want a different button name to appear on the button.
11. Modify any additional **properties** for the button, if needed.
12. Repeat steps **8** through **12** for each remaining button.
13. When you are finished with the button grid, select the **grid** and press Delete. The buttons remain in place on the panel.
14. Select **Panel > Save Panel** from the Panel Editor menu bar.  
**-or-**  
Right-click the **panel** and select **Save Panel**.



### Reference

There are additional properties you can modify for the selected buttons. Refer to the following procedures for more information:

- [Changing the color of a button](#)
- [Changing the font of a button](#)
- [Adding an image to a button](#)
- [Resizing a button](#)
- [Moving a button](#)
- [Aligning and spacing a group of buttons](#)
- [Sorting a group of buttons](#)

## Adding a menu item button

You must add menu item buttons to a panel before you can order the items from the POS terminal.

### To add an item button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Order Item** from the 'Action' property drop-down list. An additional option appears.
4. Select the **menu item** to assign to the button from the 'Item' property drop-down list.
5. Locate the **Appearance** group bar in the Properties window.
6. If you want to assign a different item name for the button, click the **left column** of the 'Text' property and in the right column, type a different **name**. The size of the button affects how a

name appears on a button. The text is centered on the button and you can type ‘\n’ between words to make the text that follows the ‘\n’ appear on a second line. For example, type ‘Hot\nTamale’ to have ‘Hot’ appear on the first line and ‘Tamale’ appear on the second line of a button. The Text property can be up to 40 characters.

7. If desired, modify the **font**, **background color**, and **image** for the button.

## Adding an image to a panel

You can add one or more bitmap images to a button that are not part of the panel background. For example, you can add a company logo to a panel, and move it anywhere you want on the panel. Select a bitmap image from the list of graphics preloaded into the system database. An image must be uploaded using the Media Files function, before you can select it from the image list. **Note:** Bitmap images have a .bmp file extension.

### To add a bitmap to a panel:

1. Select the **panel** to which you want to add a a bitmap.
2. Select **Panel > New Image** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **New Image**.

The image grid appears in the panel.

3. Drag the **Image grid** to the desired location in the panel.
4. With the image grid selected, locate the **Appearance Settings** group bar in the Properties window.
5. Select the **Image drop-down list** and choose a standard graphic.

**-or-**

If you want a custom image:

- a. Select **Custom** from the Image drop-down list. The Custom image property appears under the Image property.
  - b. Click the **Custom drop-down list**, and then double-click the desired graphic.
6. Select the **transparency** of the image. **Note:** This option is available for custom images only.
  7. Select **Panel > Save Panel** from the Panel Editor menu bar.

**-or-**

Right-click the **panel** and select **Save Panel**.

## Selecting multiple buttons

You can select more than one button at a time when you need to resize, move, or sort a group of buttons, as well as modify attributes for a group of buttons at one time.

### To select multiple buttons on a panel:

- With the desired panel active, press and hold the **Shift key** and drag the mouse over the buttons you want to select.
- or-
- With the desired panel active, click in an **empty area of the panel**, then drag the **mouse** over the buttons you want to select. A border appears around each selected button.
- or-
- Press and hold the **Ctrl key** and click each **button** you want to select. A border appears around each selected button.

## Changing the color of a button

When you add buttons to a panel, it is often necessary to apply a different color to a single button or a group of buttons at one time.

### To change the color of one or more buttons on a panel:

1. Select one or more **buttons** for which you want to change the color.
2. Locate the **Appearance** group bar in the Properties window.
3. Select the desired **background color**.

-or-

If you want a custom color:

- a. Select **Custom** from the 'Background Color' drop-down list. Additional properties appear under the Background Color property.
- b. Click the **Custom Background Color** property, then click the **down arrow**. A list of available colors appears.
- c. Select a **color** from the Custom, Web, or System tab. The color appears on each selected button.

## Changing the font of a button

You can change the font of the text that appears on a button:

### To change the button text font for one or more buttons on a panel:

1. Select one or more **buttons** for which you want to change the text font.
2. Select the desired **font**.

-or-

If you want a custom font:

- a. Select **Custom** from the 'Font' property drop-down list. The Custom font property appears under the Font property.
- b. Click the **Custom font property**, then click the **ellipses button (...)**. The Font dialog box appears.

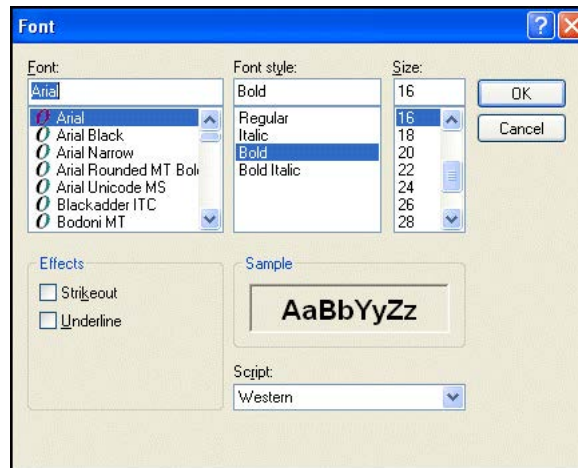


Figure 33 Font Dialog Box

- c. Select a **font**, **font style**, and **size**, then click **OK**. The button text appears with the new font style.

### Adding an image to a button

You can add bitmap images to the background of a button. For example, apply a product logo, such as Coke or Sprite, on a button to make it easy for a cashier to find on the POS terminal. Select an image from the list of graphics preloaded into the system database. An image must be uploaded using the Media Files function, before you can select it from the image list. **Note:** Bitmap images have a .bmp file extension.

#### To add an image to a button on a panel:

1. Select one or more **buttons** to which you want to add an image.
2. Select the **Image drop-down list** and choose a standard graphic.

**-or-**

If you want a custom image:

- a. Select **Custom** from the Image drop-down list. The Custom image property appears under the Image property.
- b. Click the **Custom drop-down list**, and then double-click the desired graphic.

3. Select a desired **image layout**.
4. Select the **transparency** of the image. **Note:** This option is available for custom images only.

## Resizing a button

You can change the size of a single button or multiple buttons at one time.



### Tip

Before you can resize buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To resize a single button on a panel using the Properties window:

1. Select the **button** you want to resize.
2. Locate the **Size** group bar in the Properties window.
3. Type the **width** and **height**, to modify the size of the button.

### To resize a single button on a panel using the mouse:

Move your **mouse** to the border handle of the button until you see a double-sided arrow, then hold the **left mouse** and drag the **panel border** to the size you prefer.

### To resize multiple buttons on a panel:



### Note

When you resize multiple buttons at one time, the system resizes the buttons based on the last button you select in the group.

1. Select the **buttons** you want to resize.
2. Select **Layout > Sizing** from the Panel Editor menu bar, then select one of the following options:
  - **Make Same Width**
  - **Make Same Height**
  - **Make Same Size**

-or-

Locate the **Size** group bar in the Properties window and adjust the **Width** and **Height** properties to modify the size of the buttons.

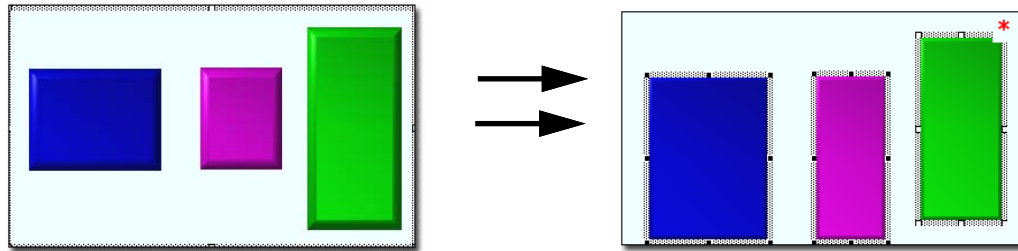


Figure 34 Resizing Buttons Using 'Make Same Height' Option

**Tip**

You can also press and hold the Shift key, then press the up, down, left, and right arrows on the keyboard to resize the buttons to the desired size.

### Moving a button

You can rearrange one or more buttons on a panel, as necessary.

**Tip**

Before you can move buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

#### To move a single button on a panel using the Properties window:

1. Select the **button** you want to move.
2. Locate the **Location** group bar in the Properties window.
3. Adjust the **X** and **Y** properties to modify the location of the button.

#### To move a single button on a panel using the mouse:

Move your **mouse** to the edge of the button until you see four arrows, then hold the left mouse and drag the button to the desired location.

#### To move a single button on a panel using the keyboard:

Select the **button** and press the appropriate **up**, **down**, **left**, or **right arrow** on the keyboard to move the button to the desired location.

**To move multiple buttons on a panel:**

1. Select the **buttons** you want to move.

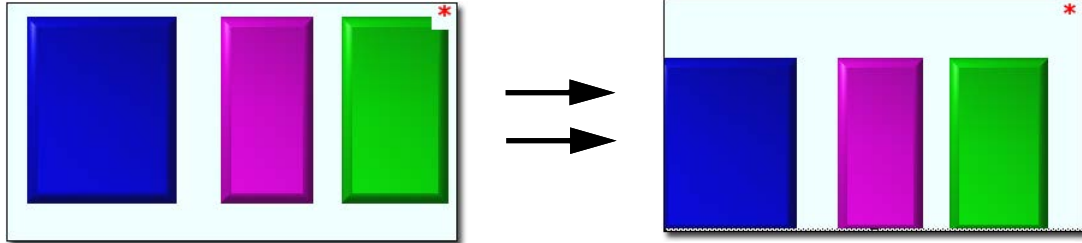


Figure 35 Moving a Group of Buttons on a Panel

2. Press the **up, down, left, and right arrows** on the keyboard to move the buttons to the desired location.

**-or-**

Locate the **Location** group bar in the Properties window and adjust the **X** and **Y** properties to modify the location of the buttons.

### Aligning and spacing a group of buttons

You can align a group of buttons on a panel by the top, bottom, left, or right sides. You can also center a group of buttons, and create an even space between buttons.



**Tip**

Before you can align buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'



### To align or evenly space multiple buttons on a panel:

1. Select the **buttons** you want to align.
2. Select **Layout > Alignment** from the Panel Editor menu bar, then select one of the following options:

• <b>Align Left</b>	• <b>Space evenly horizontally</b>
• <b>Align Right</b>	• <b>Space evenly vertically</b>
• <b>Align Top</b>	• <b>Center</b>
• <b>Align Bottom</b>	• <b>Center horizontally</b>
•	• <b>Center vertically</b>

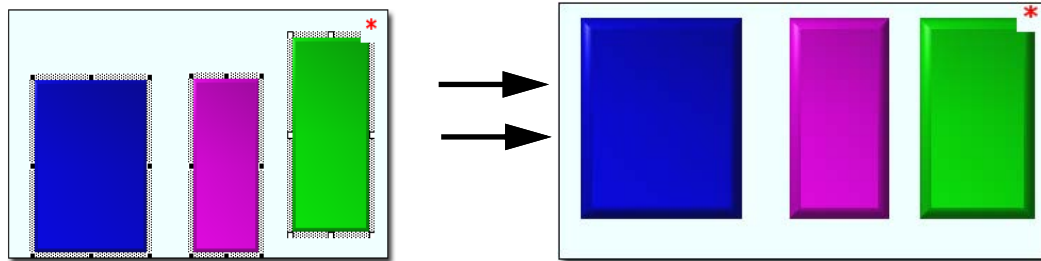


Figure 36 Aligning Multiple Buttons on a Panel Using 'Align Top' Option

### Sorting a group of buttons

You can sort a group of buttons on a panel, based on the button text, either horizontally or vertically. To sort buttons, you must first place a button grid around the buttons, if a grid does not already exist.



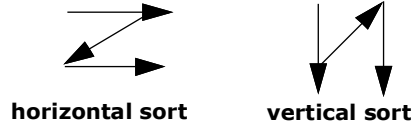
#### Tip

Before you can sort buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To sort multiple buttons on a panel using a button grid:

1. Select the **buttons** you want to sort.
2. Right-click one of the **buttons** and select **Convert to grid**. A border appears around the selected buttons.
3. Right-click the **button grid**.
4. Select one of the following options:
  - **Sort buttons horizontally**
  - **Sort buttons vertically**

The buttons re-sort on the panel as follows:



5. Select the **button grid** and press **Delete** to remove it from the panel. The buttons remain in place on the panel.

## Deleting a button

You can delete a button from a panel, if the panel is not currently assigned to a default screen.



### Tip

Before you can delete buttons on an existing panel, locate the 'Appearance' group bar in the Properties window, and ensure the 'Mark as template' and 'Fixed button layout' properties for the panel are set to 'False.'

### To delete a single button from a panel:

1. Select the **button** you want to delete.
  2. Press **Delete** on the keyboard.
- or-**
- Right-click the **button** and select **Delete**.

### To delete multiple buttons from a panel:

1. Select the **buttons** you want to delete.
  2. Press **Delete** on the keyboard.
- or-**
- Right-click and select **Delete**.

## Adding a wall

When you add a new Floor Plan panel, or open an existing Floor Plan panel, you can add a wall to separate seating areas on your floor plan layout. A wall does not have a specific function; it is available for display purposes only.

### To add a wall:

1. Click inside the selected Floor Plan **panel**.
  2. Select **Panel > New Wall** from the Panel Editor menu bar.
- or-**
- Right-click the **panel** and select **New Wall**.

The wall grid appears in the panel. **Note:** Click anywhere outside the wall grid to view the wall.

3. Drag the **wall** to the desired location in the panel.
4. With the wall selected, locate the **Wall Settings** group bar in the Properties window.
5. Select the **shape** of the wall, from the 'Style' drop-down list.
6. Modify any additional **properties** for the wall, if needed, such as **thickness, color**, and more.
7. Select **Panel > Save Panel** from the Panel Editor menu bar.

## Working with screens

The Screen Editor tool enables you to build the default screens an employee with a specific job code sees when they log in to an Aloha POS terminal. You build a default screen by selecting the panels you want to include on the default screen only.

There are a few concepts to know about when creating default screens in Screen Editor.

### Understanding screen ownership and organization

If you are a CFC user, when you build a default screen, you indicate the owner to assign to the screen in the same manner you assign an owner to a panel. The owner determines who can view and make changes to the screen record in the database, as well as which store locations receive the screen in their local database.



#### Reference

To learn more about ownership, see [Understanding owners in Screen Designer](#).

Screen Editor uses panel numbers to organize the panels for quick identification. Some restaurants have a large number of panels from which to choose, when they build their default screens. In this situation, you can sort the list of panels for your screens by name or number and you can use the 'Search' function to quickly locate a specific panel by text.

### Identifying overlapping panels

You cannot save a screen if there are overlapping panels. This is because you need access to every button on each panel. If you have panels that overlap on your default screen, return to Panel Editor, and resize the panels to ensure they do not overlap.

Of course, when you create panels in Panel Editor, you can overlap some panels on purpose. These are secondary panels that you access with chain buttons, during the course of completing an order transaction. These secondary panels are not part of the default screen; therefore, these panels can overlap.

### Understanding job code assignment

After you create a default screen, you must assign the default screen to a job code before an employee can access the default screen on an Aloha POS terminal. You can create as many default screens as you need for your establishment; however, keep in mind that a job code can have only one default screen assigned to it at a time.

### Understanding default screen versioning

If you manage multiple sites using CFC, you can create a version of a primary panel to use when one or more stores have variations in their order entry screens. Additionally, you can create a version of a default screen, when one or more stores need different panels assigned, for a certain screen, such as a cashier screen.

Screen versioning uses standard versioning, which means any screen version you create overrides its primary default screen indefinitely, as there are no start and end dates used with standard versioning. As long as the version exists, it will be active at the store. If you no longer want a version of a default screen available at a store, you delete the version, and the primary default screen will be in effect at the store.

Although you can create a version of a default screen, when you select different panels to add to the versioned screen, the panels available for selection are 'primary' panels only. If a version of a panel exists in the database, the version will automatically override its primary panel at designated stores, based on the version assignment, and start and end dates of the versioned panel.

If you are a corporate employee and you create a version of a default screen for a specific store, you can assign corporate-owned panels to the versioned screen; however, store employees cannot create a version of a default screen.

## Introducing Screen Editor

The Screen Editor environment contains specific tools to help you create and manage POS screens.

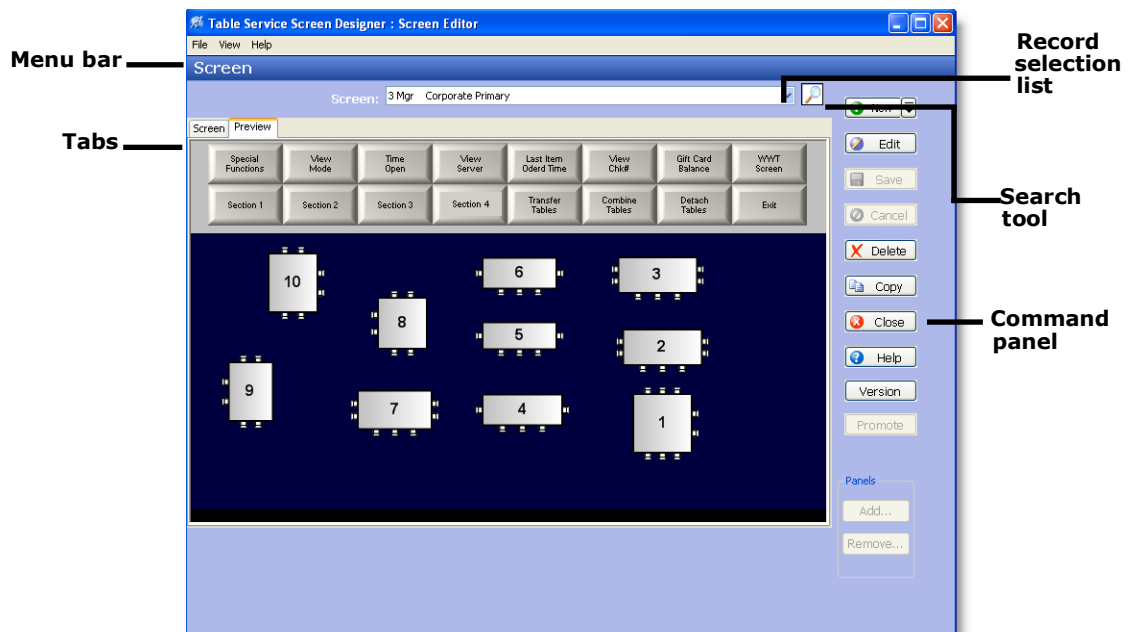


Figure 37 Screen Editor Screen

### Menu bar

**File** — Enables you to exit Screen Editor and return to the system, exit the system application, or switch to Panel Editor.

**View** — Enables you to show or hide the Properties window and set the color scheme (skins) for panels.

**Help** — Enables you to get online Help for Screen Designer and Screen Editor, as well as product version information.

### Screen tab

The Screen tab contains the basic properties for a selected screen. You can quickly view the number and name for the screen, as well as the appearance settings for the screen.

### Preview tab

The Preview tab enables you to view the panels you add to the screen; thereby, helping you determine if you have the correct panels in place for the default screen.

### Command panel

The Command panel provides action buttons that perform specific functions in Screen Editor, such as New, Save, and Cancel.

### Search button

A search button is available, next to the record selection list, which enables you to search for screens by text or by number. By default, all screen records are visible in the record selection list.

## What you can do with default screens

Here are some of the things you can do with default screens in Screen Designer:

### Opening and closing Screen Editor

You access Screen Editor through the Screen Designer application. After you save your screen, you can close Screen Editor at any time and return to the system main screen.

#### To open Screen Editor:

1. Select **Maintenance > Screen Designer > Table Service Screen Designer** from the system menu bar. The Screen Designer home screen appears.
2. Click **Work with Screens**. The Screen Editor screen appears with the Screen tab displayed.

#### To close Screen Editor:

1. Select **File > Close Screen Editor** from the Screen Editor menu bar.

-or-

Click **Close (X)**.

-or-

Press **Ctrl+F4**.

2. If a confirmation message appears for you to save, select the desired **option**. The system returns to the system main screen.



#### Tip

You can also switch to Screen Editor while in Panel Editor. Select File > Screen Editor from the Panel Editor menu bar.

## Creating a screen

You create a default screen from the existing panels created in Panel Editor. Create as many default screens as needed for your establishment.

### To create a screen:

1. Click **New**. The Screen tab appears with the owner and default number assigned to the screen record. **Note:** If you are a CFC user, select the **owner** to assign to the screen and click **OK**.



#### Tip

If you press New, instead of pressing the drop-down arrow next to 'New,' the system automatically assigns the same owner as assigned to the user account under which you logged in to the system.

2. If you want the system to assign a different number to the screen, click the **left column** of the 'Number' property and in the right column, type the **new number**.

**-or-**

Click the **ellipses button (...)**. The Number Assignment dialog box appears.

3. 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.

4. Click the **left column** of the 'Name' property and in the right column, type a **name** for the screen. The name identifies the purpose of the screen, such as Cashier, Manager, and Drive-Thru, to name a few.
5. Select the desired **background color**. The background color fills the area behind the screen with solid color.

**-or-**

If you want a custom color:

- a. Select **Custom** from the 'Background color' drop-down list. Additional properties appear under the Background color property.
  - b. Click in the **Custom background color** property, then click the **down arrow**. A list of available custom colors appears.
  - c. Select a **color** from the Custom, Web, or System tab. The background color fills the area behind the screen with solid color.
6. Select the desired **background image**. A Background image fills the area behind the screen with a specific image.

**-or-**

If you want a custom image:

- a. Select **Custom** from the drop-down list. The Custom background image property appears under the Background image property.
  - b. Click in the **Custom background image property**, then click the **ellipses button (...)**. The Media Control dialog box appears.
  - c. Click **Upload**. The Open dialog box appears.
  - d. Select the desired **bitmap image** and click **OK**. A preview of the image and the image file name appear in the Media Control dialog box.
  - e. Click **OK**. The image appears as a backdrop on the screen.
7. Select a desired **image layout**.
  8. Select the **transparency** of the image.
  9. Select **Remember screen on exit**, if you want the screen to remember the last panel touched upon exit, and return the employee to that panel when they sign back in to the POS terminal.



#### Note

If the next screen you want to add has the same owner as the previous screen, click **New** to create the next record; otherwise, click the **drop-down arrow** next to New, to create the next screen.



10. Click **Add**. The Add Panels dialog box appears.
11. Select each **panel** you want to add to the screen. To select multiple panels, hold down the **Ctrl** key and select each panel.
12. Click **OK**. The selected panels appear on the Preview tab.
13. Click **Save**, when finished.

## Opening a screen

You can quickly locate and open an existing screen from the Screen Editor record selection list.

### To locate and open a screen:

1. Click the **down arrow** next to 'Screen:' and select the desired **screen** from the 'Record Selection' drop-down list.
2. To sort screens by number or name, click the appropriate **column heading** in the 'Record Selection' list. **Note:** If you are a CFC user, you can also sort by owner.

## Adding a panel to a screen

You can add one or more panels to an existing default screen, as necessary.

### To add a panel to a screen:

1. Open the desired **screen** to which you want to add a panel, from the Record Selection list. The selected record appears on the screen.
2. Click **Edit**.
3. Click **Add**. The Add Panels dialog box appears.
4. Select the **panel** you want to add to the screen. To select multiple panels, hold down the **Ctrl** key and select each panel.
5. Click **OK**. The selected panels appear on the Preview tab.
6. Click **Save**, when finished.

## Removing a panel from a screen

You can remove a panel from an existing default screen, as necessary.

### To remove a panel from a screen:

1. Open the desired **screen** from which you want to remove a panel, from the Record Selection list. The selected record appears on the screen.
2. Click **Edit**.
3. Click **Remove**. The Remove Panels dialog box appears.
4. Select the **panel** you want to remove from the screen. To select multiple panels, hold down the **Ctrl** key and select each panel.
5. Click **OK**. The selected panels no longer appear on the Preview tab.
6. Click **Save**, when finished.

## Applying color to a screen

You can apply color to the background section of a screen, to give the screen a harmonious, theme-based look.

### To apply color to the background area of a screen:

1. Open the desired **screen** to which you want apply background color, from the Record Selection list. The selected record appears on the screen.
2. Click **Edit**.
3. Select the desired **background color**. The background color fills the area behind the screen with solid color.

**-or-**

If you want a custom background color:

- a. Select **Custom** from the 'Background color' drop-down list. The Custom background color property appears under the Background color property.
  - b. Click in the **Custom background color** property, then click the **down arrow**. A list of available custom colors appears.
  - c. Select a **color** from the Custom, Web, or System tab. The background color fills the area behind the screen with solid color.
4. Click the **Preview** tab to view the changes.
  5. Click **Save**, when finished.

## Adding an image to a screen

You can add an image to the background section of a screen, to enhance the look of the screen. Select an image from the list of graphics preloaded into the system database. An image must be uploaded using the Media Files function, before you can select it from the image list.

### To add an image the background area of a screen:

1. Open the desired **screen** to which you want to add an image, from the Record Selection list. The selected record appears on the screen.
2. Click **Edit**.
3. Select the **Background Image drop-down list** and select a standard **background image**. A Background image fills the area behind a screen with a specific image.

**-or-**

If you want a custom background image:

- a. Select **Custom** from the Background Image drop-down list. The Custom background property appears under the Image property.
- b. Click the **Custom background drop-down list**, and then double-click the desired graphic.

4. Select a desired **image layout**.
5. Select the **transparency** of the image. **Note:** This option is available for custom backgrounds only.
6. Click the **Preview** tab to view the changes.
7. Click **Save**, when finished.

### Creating a version of a screen

If you manage multiple sites using CFC, the system allows you to create a version of a primary screen, 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.

#### To create a version of a default screen:

1. Open the desired **primary screen** for which you want to create a version, from the Record Selection list. The selected record appears on the screen.
2. Click **Version**. The Version Assignment dialog box appears.

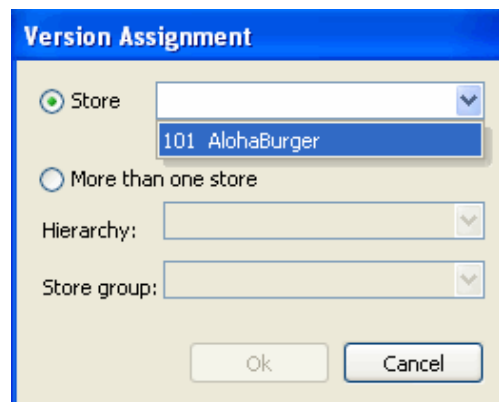


Figure 38 Version Assignment: Store or Store Group

3. Select from **one** of the following options:
  - o 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 screen to that store.

- o 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.
4. Click **OK**. The system returns you to the function screen, and a version of the primary screen appears. The record number is the same as the primary screen. A Version Assignment option appears, which displays the store, or store group/hierarchy combination you selected.
  5. Use the **Add** or **Remove** buttons to modify the panels assigned to the version. Make changes to any of the other settings for the version record, as necessary.
  6. Click **Save**, when finished.

## Testing screens with Screen Simulator

The Screen Simulator tool enables you to perform a virtual test of a selected screen, including the panels and buttons used to build the screen.

Although you cannot make edits while in Screen Simulator mode, you can select a panel element and view the properties for that element. For example, if you select a button on one of the panels, the Properties window displays the function or action assigned to the button. You access Screen Simulator from the Panel menu in Panel Editor.

## Introducing the Screen Simulator screen

The Screen Simulator environment contains specific tools that help you test panel and button functionality.

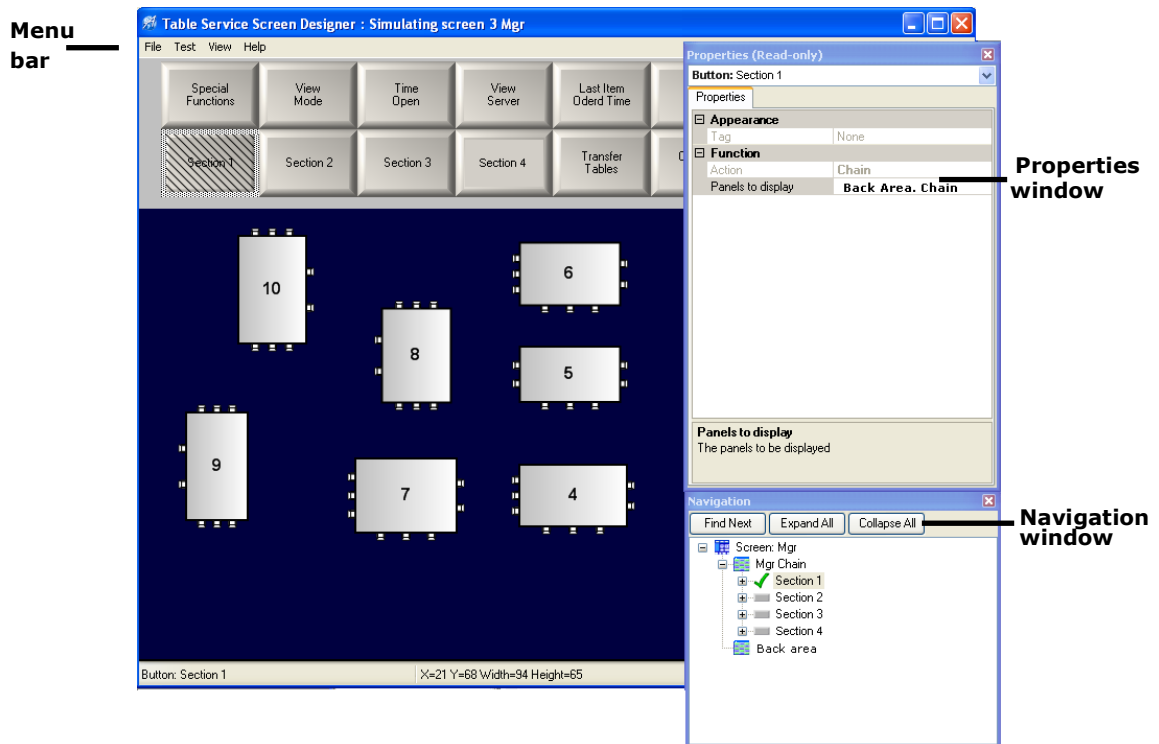


Figure 39 Screen Simulator Tool

### Menu bar

**File** — Enables you to exit Panel Editor, exit the system, or switch to Screen Editor.

**Test** — Enables you to restart a test or exit Screen Simulator and return to the Panel Editor screen.

**View** — Enables you to show or hide the Properties and/or Navigation window.

**Help** — Enables you to get online Help for Screen Designer and Screen Simulator, as well as product version information.

## Properties window

The Properties window lists the current properties for a selected screen element, such as a panel or button. This window appears at all times, so you can quickly view properties for a selected element. For example, if you click in a panel, the Properties Window displays the settings for the selected panel, including the title, font, color, ID number, location, size, and much more. If you click on a button, the Properties window displays the function property only. To close the Properties window, click **Close (X)**.

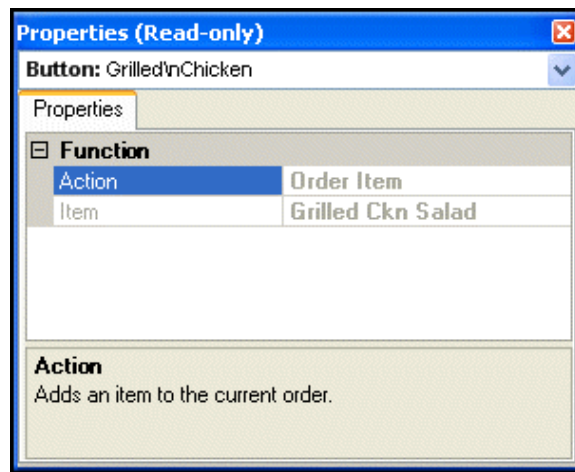


Figure 40 Read Only Properties Window



### Note

You cannot make changes to any properties for a selected panel or button in Screen Simulator. You must return to the Panel Editor screen to make changes.

## Navigation window

The Navigation window, located in the bottom right corner of Screen Simulator, enables you to view the screen flow of panels linked together by 'chain' buttons. You can verify that buttons 'chain' or link to the proper panels. When you double-click a button in the Navigation window, the navigation tree expands to where the button is in the screen flow and highlights the selected button.

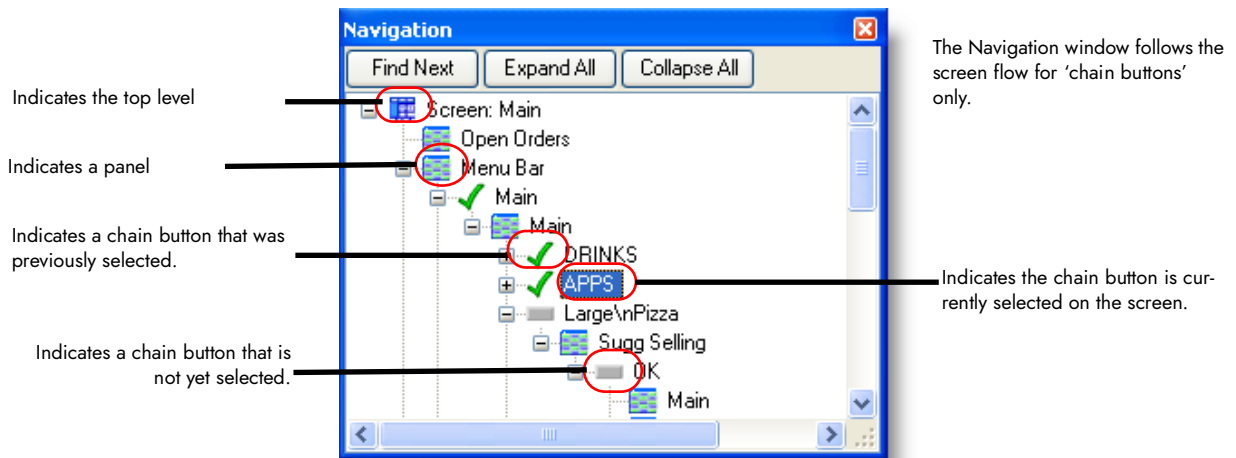


Figure 41 Screen Simulator Navigation Window

### To use the Navigation window:

By default, when you access Screen Simulator, the Navigation tree is fully collapsed and only the top-level default screen appears. The following lists the common actions you can perform in the Navigation window:

If you want to...	Do this...
Expand a panel to its next sub-level.	Click the <b>(+)</b> sign next to a panel to show sub-level panels and 'chain' buttons for the selected panel.
Collapse a menu to its previous level.	Click the <b>(-)</b> sign next to a panel to hide the sub-level panels and 'chain' buttons for the selected panel.
Follow the screen flow for chain buttons on a specific panel.	Select the <b>panel</b> you want to follow. Click <b>Find Next</b> . Starting with the first chain button on the panel, the Navigation window highlights the next instance of a chain button. Continue to click <b>Find Next</b> to follow the screen flow for that button. When the system finishes the screen flow for the first button on your selected panel, it goes to the next chain button on your selected panel and follows the screen button flow for that button. This continues until the screen flow for all chain buttons on your selected panel is displayed.



If you want to...	Do this...
Show all panels and chain buttons for a screen.	Click <b>Expand All</b> . The Navigation window displays all panels and chain buttons for the screen.
Hide all panels and chain buttons for a screen.	Click <b>Collapse All</b> . The Navigation window hides all panels and chain buttons for the screen.

## What you can do with screen simulator

Here are some of the things you can do with Screen Simulator:

### Opening and closing screen simulator

You access Screen Simulator through Panel Editor. After you complete your screen test, you can close Screen Simulator at any time and return to the Panel Editor screen.

#### To open Screen Simulator:

1. Select **Panel > Test Screen...** from the Panel Editor menu bar. The Select Screen dialog box appears.
2. Select the desired **screen** and click **OK**.

**-or-**

Double-click the desired **screen**.

The Screen Simulator screen appears.

#### To close Screen Simulator:

Select **Test > Exit Test** from the Screen Simulator menu bar.

**-or-**

Click **Close (X)**.

**-or-**

Press **Ctrl+F4**.



#### Tip

You can also switch to Screen Editor while in Screen Simulator. Select **File > Screen Editor** from the Screen Simulator menu bar.

## Testing a screen

When you test a screen, you verify the button function properties and the chain links to other panels are correct.

### To test a screen:

1. Click the **first button** at the top-left of your screen. When you click a button, the Properties window displays the function assigned to the button so you can verify you applied the right function to the button. Also, diagonal lines appear on each button you click, to indicate you tested the button.
2. Continue to click each **button** on your screen. If you click a 'chain' button or a 'script' button that includes a 'chain' button, the Navigation window shows the location of the button in the navigation tree, and places a green check mark next to the button.
3. Verify the **correct panel** appears when you click a 'chain' button.
4. If you find any buttons you need to change, select **Test > Exit Test** from the Screen Simulator menu bar. The system returns you to the Panel Editor screen with all panels open for the screen you tested.
5. Make any necessary **changes**, then save and test your **screen** again in Screen Simulator.

## Restarting a test

While in Screen Simulator, if you need to re-verify buttons or panels you already checked, you can restart a screen test already in progress.

To restart a test, select **Test > Restart Test** from the Screen Simulator menu bar.

## Activating screens

After you create panels for your screens in Panel Editor, build the default screens in Screen Editor, and test the screens in Screen Simulator, you are ready to activate the order entry screens for use on POS terminals.

You can assign a default screen to an existing job code or terminal, to control which screen an employee always sees first, when they access a POS terminal. You can also restrict access to screens for employees required to clock in, but do not require access to the order entry system.

If you are CFC user for a multi-store POS database administrator, you also need to set up events or schedules that distribute screens and panels to one or more stores, based on the owner and activations dates assigned to each panel and screen. Additionally, each store must perform a manual or automatic refresh, to update the POS terminals with any new screens and panels they receive, before employees can access them on the POS terminals.

## Assigning a default floor plan screen to a job code

Table Service enables you to assign a Floor Plan screen to a specific job code, to indicate the default screen an employee with that job code always sees first, when they access a POS terminal.



### Note

A default screen assigned to a job code overrides a default screen assigned to a terminal.

### To assign a screen to a job code:

1. Select **Maintenance > Labor > Jobcodes**. The Jobcode function screen appears with the Jobcode tab as the active tab.
2. Select the desired **job code** from the 'Record Selection' drop-down list. The options related to the selected job code appear.
3. Click **Edit**, then select the **Order Entry** tab.
4. Select the **check box** next to 'Use Floor Plan.' Click in the **left column** of the 'Screen' option and in the right column, select the **default screen** to assign to the job code from the drop-down list. The default Floor Plan screen you select is available to all employees that clock in with that job code, no matter which POS terminal they use.

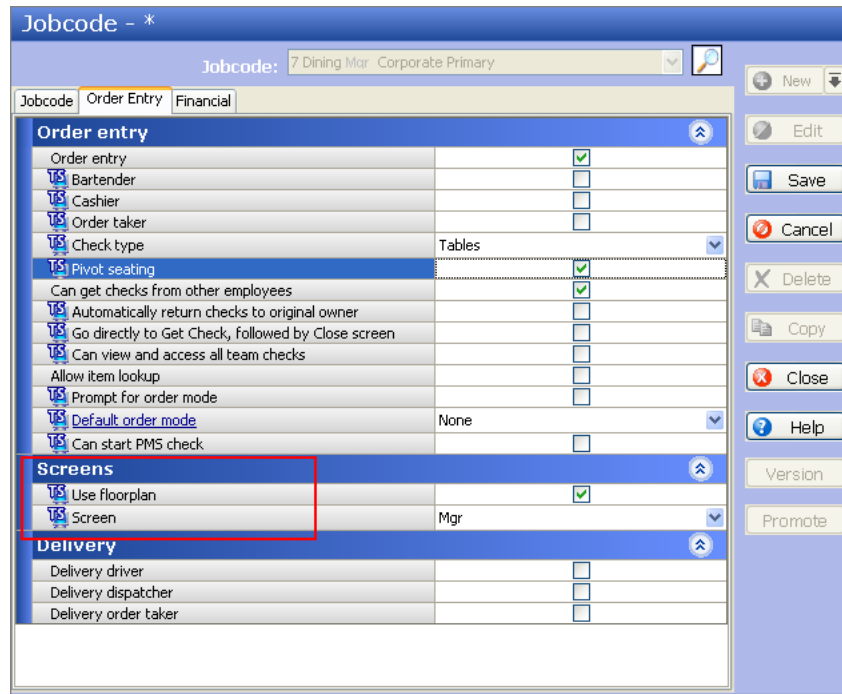


Figure 42 Assign a Screen to a Job Code

5. Click **Save**, when finished.

### Assigning a default screen to a terminal

It is not mandatory to assign a default screen to a job code for an employee to have access to the screen. For example, if you have an employee that works both bar and Take-Out during a single shift, you may need your employees to see one type of default screen when entering orders at the bar, and a different default screen when entering orders at the Take-Out station. In this situation, you assign the appropriate default screen to the terminal itself, and not to the job code assigned to your counter employees.

#### Note

If a default screen is assigned to a job code, that default screen will override a default screen assigned to a terminal. Double-check that the job code does not have a screen selected in Maintenance > Labor > Jobcode > Order Entry tab.

**To assign a screen to a terminal:**

1. Select **Maintenance > Hardware > Terminals** from the system Menu bar. The Terminal function screen appears with the Terminal tab displayed.
2. Select the desired **terminal** from the 'Record Selection' drop-down list. The options related to the selected terminal appear.
3. Click **Edit**, then locate the **Screens** group bar.
4. Click in the **left column** of the 'Table Service Screen' option and in the right column, select the **default screen** to assign the terminal from the drop-down list. The default screen you select is available to all employees that utilize that terminal, and do not already have a default screen assigned to their job code.

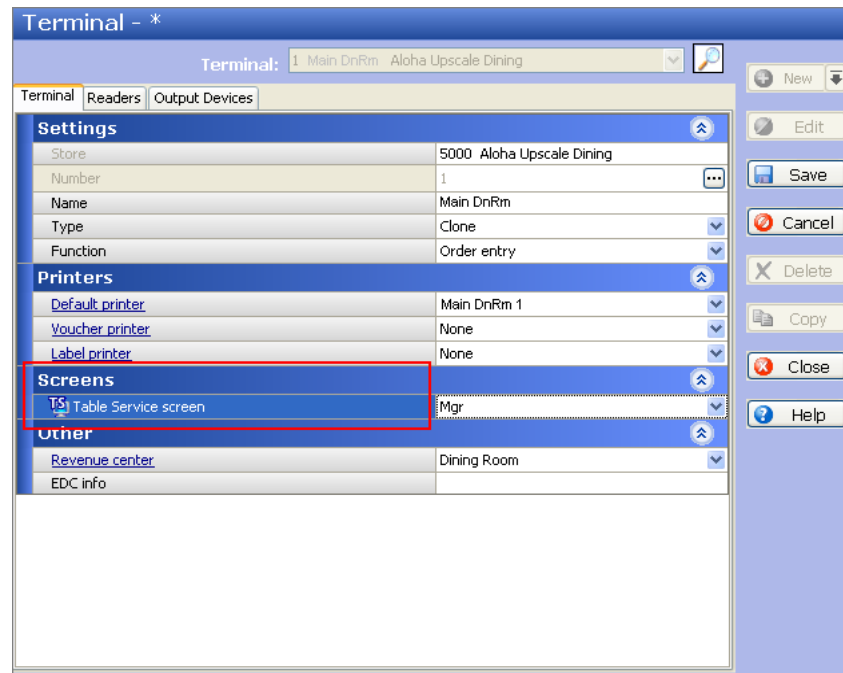


Figure 43 Assign a Screen to a Terminal

5. Click **Save**, when finished.

## Activating a submenu panel

Before you can use a customized Submenu panel, you need to make the Submenu panel available on the POS order entry screen. You can either add a new submenu, and then select the custom submenu you want to appear on the order entry screen, or replace an existing submenu with a custom panel.



### Caution

When you select an existing submenu, be aware that when you replace the standard submenu with a custom one, the buttons on the standard submenu will no longer be available. For this reason, we recommend you create a new submenu record to activate your custom submenu.

### To activate a custom submenu panel:

1. Select **Maintenance > Menu > Submenu** from the Aloha Configuration Center Menu bar. The Submenu function screen appears with the Submenu tab displayed.
2. Do **one** of the following:
  - Create a new **Submenu record** and complete the required options.
  - Select an existing **Submenu record** from the 'Record Selection' drop-down list.

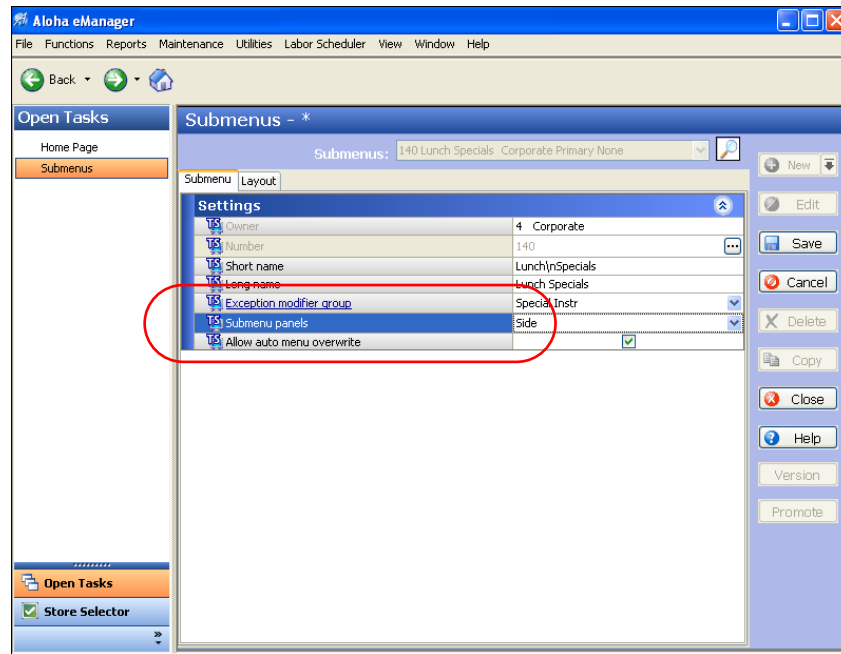


Figure 44 Custom Submenu Panel Activation

3. Select the **custom panel** you want to use from the 'Submenu Panel' drop-down list.



**Caution**

When you select an existing submenu, a message appears informing you when you replace the standard submenu with a custom one, the buttons on the standard submenu will no longer be available.

4. Click **Save**, when finished.

## Activating an order entry panel

Before you can use your custom Order Entry panel to replace the Action Item area, you must set up a 'Set Order Screen Panel by Jobcode' event to make the panel available on the POS order entry screen.

### To activate a custom order entry panel through an event:

1. Select **Maintenance > System Settings > Event Schedules** from the Aloha Configuration Center Menu bar.  
 The Event Schedule function screen appears with the Event Schedule tab displayed.
2. Do **one** of the following:
  - Create a new **Event record** and complete the required option on the current tab.
  - Select an existing **Event record** from the 'Record Selection' drop-down list.
3. Select the **Events** tab.
4. Click the **drop-down list** next to 'Add' and select the 'Set Order Screen Panel by Jobcode' event.
5. Click **OK**.

After you select the event, a new grid row appears at the top of the Events tab, to schedule the event. Additionally, configuration options appear at the bottom of the Events tab, to set configuration options for the event.

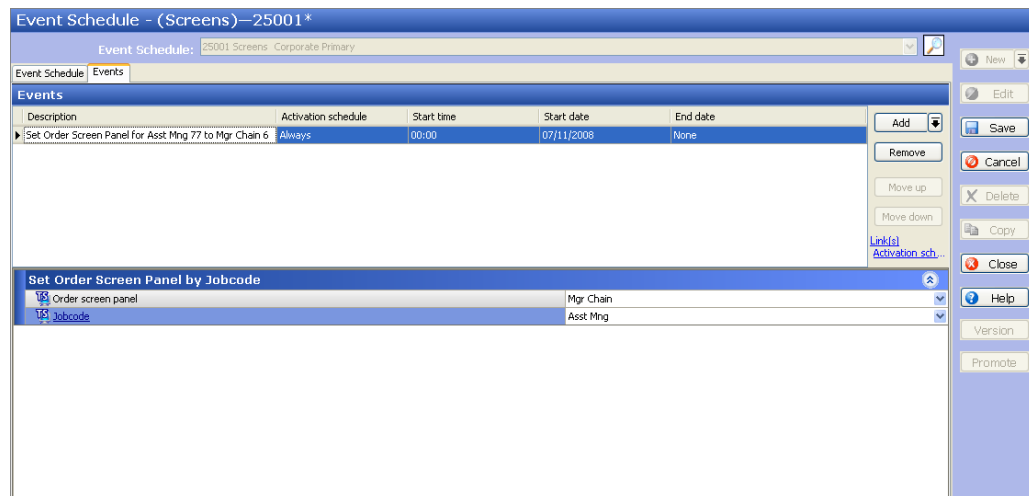


Figure 45 Custom Order Entry Panel Activation

6. Select an existing **schedule** to indicate how often and what time the order entry panel should be active, from the 'Activation schedule' drop-down list.
7. Select **start** and **end dates** to indicate how long you want the order entry panel active at the store.



8. At the bottom of the screen, select the custom **order entry panel** you want to activate.
9. Select the **job code** to which you want to assign the order entry panel.
10. Click **Save**, when finished.

## Activating a Close screen panel

Before you can use your custom Close Screen panel, you must use the 'Set Close Screen Panel' event to schedule the panel to appear on the POS Close screen.

**To schedule the customized panel to appear on the Close screen.**

1. Select **Maintenance > System Settings > Event Schedule**.
2. Select an existing Event Schedule, usually only one exists.
3. Select the **Events** tab.

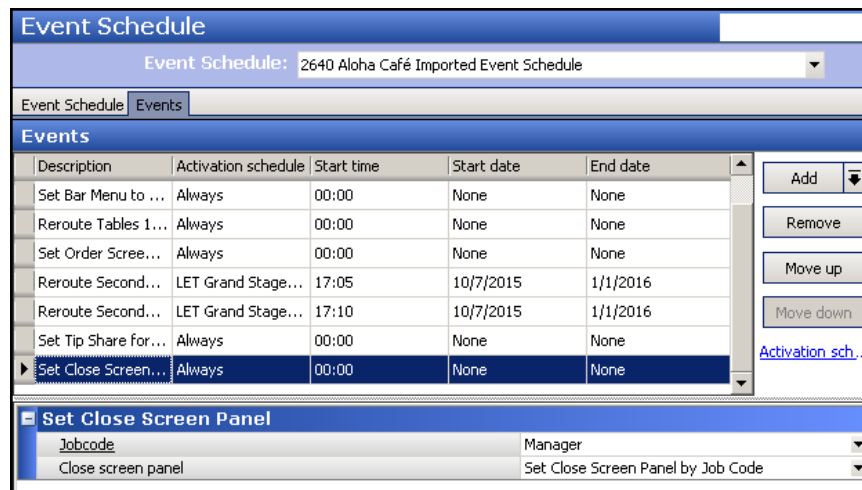


Figure 46 Event Schedule

4. Under the 'Events' group bar, click the **Add** drop-down arrow, select **Set Close Screen Panel**, and click **OK**.
5. Select the **activation schedule that begins at the desired start time** from the drop-down list. For example, 'Always.'
6. Under the 'Set Close Screen Panel' group bar, select a **job code**, such as 'ATO Order Taker,' from the drop-down list.
7. Select the **customized panel you created to appear in the bottom right corner of the Close screen from the 'Close screen panel'** drop-down list. For example, 'Close Screen for ATO Order Taker.'
8. Click **Save** and exit the **Event Schedule** function.

## Appendix A: Properties window descriptions

Appendix A provides definitions for each of the options available on the Properties dialog box.

Appendix A provides a description of each Properties window option in Panel Editor. This section is categorized by panel-related properties, button-related properties, and button grid properties. The properties for each group are listed in the order they appear on the Properties window.

### Panel window properties

The following descriptions apply to the properties available for a panel, in Panel Editor:

#### Group Bar: Appearance

**Title** — Designates the text used as the title of the panel. Add text to the title of the panel, if desired. The width of the panel should be considered when selecting a title. The text entered here appears on a system generated portion at the top of the panel. The background color of the system generated portion displays according to the Windows display configuration. If this property is left blank, the panel appears without a system title bar.

**Font** — Specifies the pre-defined character styles for the title text. Select from Custom, Very Large, Large, Medium, Small, Very Small, Title Bar, Title Panel, and Panel Button.

**Custom Font** — Enables you to specify a unique character style for the title text. Click the **ellipses button (...)** to select a font. This property is available when you select a custom font. You can add additional characteristics for the font. **Required Options:** You must select 'Custom' from the 'Font' drop-down list to enable this option.

- **Name** - Specifies the name of the font.
- **Size** - Specifies the size of the font.
- **Unit** - Determines the unit measure to use for the custom font. Select from World, Pixel, Point, Inch, Document, and Millimeter.
- **Bold** - Directs the font to appear in bold text.
- **GdiCharSet** - Used with fonts with a specific character set, such as a codepage other than the system CP\_ACP.
- **GdiVerticalFont** - Used with fonts, in a vertical alignment, with a specific character set, such as a codepage other than the system CP\_ACP.
- **Italic** - Directs the font to appear in italic text.
- **Strikeout** - Includes a line across the text, usually indicating the text was considered but then later crossed out.
- **Underline** - Includes a line under the text.

**Title Color** — Applies a color to the title text of the panel.

- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list
- **Custom** - Uses a custom color for the title of the panel. **Related Options:** This option enables the 'Custom Title Color' option.

**Custom Title Color** — Enables you to select a color from the color palette to apply to the title of the panel. **Required Options:** You must select 'Custom' from the 'Title Color' drop-down list to enable this option.

**Title Position** — Indicates the alignment or location of the title on the panel border. Select from Default, Left, Right, and Center.

**Background Color** — Applies a color to the background of the panel. Select from Custom and Skin.

- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list
- **Custom** - Uses a custom color for the background of the panel. **Related Options:** This option enables the 'Custom Background Color' option.

**Custom Background Color** — Enables you to select a color from the color palette to apply to the background of the panel. **Required Options:** You must select 'Custom' from the 'Background Color' drop-down list to enable this option.

**Image** — Enables you to add an graphic to the background of a panel. Additional properties appear when you select Custom.

- **Custom** - Uses a custom image for the background of the panel. **Related Options:** This option enables the 'Custom Image' option.
- **Information** - Inserts a lowercase letter 'i' for the background of the panel, indication the concept of information.
- **Alert** - Inserts an exclamation mark inside a triangle for the background of the panel. **Required Options:** You must enable the Alerts feature to use this feature.
- **Error** - Inserts a stop sign for the background of the panel.
- **Scroll up** - Inserts an upward arch for the background of the panel.
- **Scroll page up** - Inserts an upward arch and curve for the background of the panel.
- **Scroll down** - Inserts a downward arch for the background of the panel.
- **Scroll page down** - Inserts a downward arch and curve for the background of the panel.
- **Scroll left** - Inserts a leftward arch for the background of the panel.
- **Scroll right** - Inserts a rightward arch for the background of the panel.
- **Enter** - Inserts a leftward broken arrow for the background of the panel.

- **Backspace** - Inserts a leftward arrow for the background of the panel.

**Custom Image** — Uses a unique image to add to the panel background. Click the drop-down list to select an image. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Image Layout** — Allows you to choose the positioning of the image to the background of the panel, using a graphical display.

**Transparent Image** — Displays the background of the panel as the same color or image of the screen in which the panel resides, creating a 3-D effect. This effect is useful when a color is defined or when bitmaps are attached to the screen in Screen Editor. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Hide panel border** — Displays the panel with no borders. When set to 'True,' the system hides the border on the selected panel, and any text entered for the 'Title' property does not appear on the panel.

**Mark as template** — Locks the panel as a template in a fixed location on the workspace. All buttons on the panel are not available for edit. **Related Options:** This option automatically selects 'Fixed panel position' and 'Fixed button layout.'



#### Tip

We recommend you select 'Mark as Template' on all completed panels to prevent accidental changes to the panel.

**Fixed panel position** — Locks the panel in a fixed position on the screen; therefore, you can not accidentally move it to another part of the screen. **Related Options:** This option is automatically selected when you select 'Mark as template.'

**Fixed button layout** — Locks the button layout in a fixed position on the panel itself. You can not accidentally move buttons to another position on the panel, or add or delete them. **Related Options:** This option is automatically selected when you select 'Mark as template.'

**Use new panel display options** — Enables you to override the attributes of the skin for this panel and apply such things as a gradient, shadow, and bevel. Select True to enable, or False to disable, this feature.

**Gradient** — Applies a smooth blending of shades from one color to another on the background panel in either a linear or radial pattern.

- **None** - Does not apply a gradient to the background of the panel.
- **Linear** - Applies the gradient from the starting point to the ending point in a straight line.
- **Radial** - Applies the gradient from the starting point to the ending point in a circular pattern.

**Gradient color** — Enables you to select a color from the color palette to apply to the gradient.

**Required Options:** You must select 'Linear' or 'Radial' from the 'Gradient' drop-down list to enable this option.

**Shadow** — Applies a visual effect with the impression the panel is raised above the objects behind it. Select True to enable, or False to disable, this feature. **Related Options:** This option enables the 'Shadow color' option.

**Shadow color** — Enables you to select a color from the color palette to apply to the shadow.

**Required Options:** You must select 'True' from the 'Shadow' drop-down list to enable this option.

**Bevel** — Adds a downward slope to the bottom right edge of the panel. Select True to enable, or False to disable, this feature.

**Outline** — Adds an outline on the edge of the panel.

**Outline color** — Specifies the color to apply to the outline of a panel. **Required Options:** You must select 'Outline' to enable this option.

**Outline width** — Specifies the width, in pixels, of the outline of a panel. **Required Options:** You must select 'Outline' to enable this option.

**Scale image** — Automatically resizes the image you add to dimensions of the panel.

**Style** — Specifies the geometrical edges of the panel.

- **Rounded rectangle** - Adds rounded corners to the rectangular shape of the panel.
- **Rectangle** - Adds four right angles to the rectangular shape of the panel.
- **Ellipse** - Adds an oval shape to the outer edge of the panel.

#### Group Bar: Floor Plan

**Show seats on tables** — Indicates you want seats to appear when you add a table on the Floor Plan panel. You must set this option to true if you want seats to display around the tables on your panel.

**Seat width** — Specifies the width of the seat. Note: If you set the seat width to a number larger than the table can accommodate, you may need to lower the seat width to display all seats around the table. **Required Options:** You must select 'Show seats on tables' to enable this option.

#### Group Bar: Identification

**Owner** — Determines who can view and maintain a panel. Each panel you create has an owner assigned. There are three owner types (Global, Corporate, and Store) and each type indicates who can view and maintain a specific panel, as well as which store location receives the panel. For example, if you want the 'Drinks' panel available at all store locations, you assign an owner whose owner

type is global; however, if you want the panel to appear at a specific store only, you assign an owner for a specific store to the panel. **Related Options:** To change the owner before you create a new panel, select **Panel > New Panel Options** from the Panel Editor menu bar.

**Version Assignment** — Designates the store or store group to which the version panel is assigned. Related Requirement: This option only appears when you create a version of a panel.

**Start Date** — Indicates the first day you want the version panel active at the store. **Note:** This option appears for scheduled versions only.

**End Date** — Indicates the last day you want the version panel active at the store. **Note:** This option appears for scheduled versions only.

**Number** — Indicates the unique six-digit number that identifies the panel. This option is available for non-versioned panels only. After you save a panel, you cannot change the number assigned to the panel. If you want the system to assign a unique number, click the **ellipses button (...)** and the Number Assignment dialog box appears. Select one of the following options:

- Select **Next unassigned number** to start with the last number assigned to a panel in the database, and search for the next available number to assign.
- Select **First unassigned number** to start with the first number assigned to a panel in the database, and search for the next available number to assign.
- Select **First unassigned number following 0** to start with zero (0), and search for the next available number in the database to assign.
- Select **This number** to use the number you type for this option. If you want to specify a number, use the 'View already assigned numbers' view list to quickly see the numbers already in use.

**Name** — Designates a unique name for the panel, according to the function it performs. You can enter up to 40 characters. This option is available for non-versioned panels only.

**Description** — Enables you to provide a brief description of the panel and its use. You can enter up to 50 characters.

#### Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the panel. You can change the numbers for this property to move the panel, as needed.

**X** — Indicates the X (horizontal) coordinate for the panel. Change this number to move the panel left or right.

**Y** — Indicates the Y (vertical) coordinate for the panel. Change this number to move the panel up or down.

**Size** — Indicates the width and height of the panel. You can change the numbers for this property to resize the panel, as needed.

**Width** — Indicates the width of the panel.

**Height** — Indicates the height of the panel.

## Button window properties

The following descriptions apply to the properties available for a button, in Panel Editor:

### Group Bar: Appearance

**Text** — Designates the text used as the button name. The width of the panel should be considered when selecting a name. The size of the button affects how a name appears on a button. The text is centered on the button and you can type ‘\n’ between words to make the text that follows the ‘\n’ appear on a second line. For example, type ‘Hot\nTamale’ to have ‘Hot’ appear on the first line and ‘Tamale’ appear on the second line of a button. The Text property can be up to 40 characters.

**Text Alignment** — Specifies the positioning of the text on the button, using a graphical display.

**Font** — Specifies the pre-defined character styles for the text of the button. Select from Custom, Very Large, Large, Medium, Small, Very Small, Title Bar, Title Panel, and Panel Button.

**Custom Font** — Enables you to specify a unique character style for the text on the button. Click the **ellipses button (...)** to select a font. This property is available when you select a custom font. You can add additional characteristics for the font. **Required Options:** You must select ‘Custom’ from the ‘Font’ drop-down list to enable this option.

- **Name** - Specifies the name of the font.
- **Size** - Specifies the size of the font.
- **Unit** - Determines the unit measure to use for the custom font. Select from World, Pixel, Point, Inch, Document, and Millimeter.
- **Bold** - Directs the font to appear in bold text.
- **GdiCharSet** - Used with fonts with a specific character set, such a codepage other than the system CP\_ACP.
- **GdiVerticalFont** - Used with fonts, in a vertical alignment, with a specific character set, such as a codepage other than the system CP\_ACP.
- **Italic** - Directs the font to appear in italic text.
- **Strikeout** - Includes a line across the text, usually indicating the text was considered but then later crossed out.
- **Underline** - Includes a line under the text.

**Text Color** — Applies a color to the text of the button.

- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list
- **Custom** - Uses a custom color for the text of the button. **Related Options:** This option enables the 'Custom Title Color' option.

**Custom Text Color** — Enables you to select a color from the color palette to apply to the text of the button. **Required Options:** You must select 'Custom' from the 'Text Color' drop-down list to enable this option.

**Background Color** — Applies a color to the background of the button. Select from Custom and Skin.

- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list
- **Custom** - Uses a custom color for the background of the button. **Related Options:** This option enables the 'Custom Background Color' option.

**Custom Background Color** — Enables you to select a color from the color palette to apply to the background of the button. **Required Options:** You must select 'Custom' from the 'Background Color' drop-down list to enable this option.

**Highlight** — Applies a color to the button to indicate it is in the "pressed" position on the FOH.

- **Skin** - Uses the attributes of the skin applied to the interface. **Related Requirements:** You must select Maintenance > Business > Store > Store Settings > User Interface group > and select a skin from the 'Graphical Skin' drop-down list.
- **Custom** - Uses a custom color to indicate the button has been pressed in the FOH. **Related Options:** This option enables the 'Custom Highlight Color' option.

**Custom Highlight Color** — Enables you to select a color from the color palette to indicate the button has been pressed in the FOH. **Required Options:** You must select 'Custom' from the 'Highlight' drop-down list to enable this option.

**Image** — Enables you to add an graphic to the background of a button. Additional properties appear when you select Custom.

- **Custom** - Uses a custom image for the background of the button. **Related Options:** This option enables the 'Custom Image' option.
- **Information** - Inserts a lowercase letter 'i' for the background of the button, indication the concept of information.



- **Alert** - Inserts an exclamation mark inside a triangle for the background of the button. **Related Requirements:** You must enable the Alerts feature to use this feature.
- **Error** - Inserts a stop sign for the background of the button.
- **Scroll up** - Inserts an upward arch for the background of the button.
- **Scroll page up** - Inserts an upward arch and curve for the background of the button.
- **Scroll down** - Inserts a downward arch for the background of the button.
- **Scroll page down** - Inserts a downward arch and curve for the background of the button.
- **Scroll left** - Inserts a leftward arch for the background of the button.
- **Scroll right** - Inserts a rightward arch for the background of the button.
- **Enter** - Inserts a leftward broken arrow for the background of the button.
- **Backspace** - Inserts a leftward arrow for the background of the button.

**Custom Image** — Uses a unique image to add to the panel background. Click the drop-down list to select an image. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Image Layout** — Allows you to choose the positioning of the image to the background of the panel, using a graphical display.

**Transparent Image** — Displays the background of the panel as the same color or image of the screen in which the panel resides, creating a 3-D effect. This effect is useful when a color is defined or when bitmaps are attached to the screen in Screen Editor. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Display Text** — Indicates you want text to appear on the button.

**Use new panel display options** — Enables you to override the attributes of the skin for this button and apply such things as a gradient, shadow, and bevel. Select True to enable, or False to disable, this feature.

**Gradient** — Applies a smooth blending of shades from one color to another on the background button in either a linear or radial pattern.

- **None** - Does not apply a gradient to the background of the button.
- **Linear** - Applies the gradient from the starting point to the ending point in a straight line.
- **Radial** - Applies the gradient from the starting point to the ending point in a circular pattern.

**Gradient color** — Enables you to select a color from the color palette to apply to the gradient. **Required Options:** You must select 'Linear' or 'Radial' from the 'Gradient' drop-down list to enable this option.

**Shadow** — Applies a visual effect with the impression the button is raised above the objects behind it. Select True to enable, or False to disable, this feature. **Related Options:** This option enables the 'Shadow color' option.

**Shadow color** — Enables you to select a color from the color palette to apply to the shadow. **Required Options:** You must select 'True' from the 'Shadow' drop-down list to enable this option.

**Bevel** — Adds a downward slope to the bottom right edge of the button. Select True to enable, or False to disable, this feature.

**Outline** — Adds an outline on the edge of the button.

**Outline color** — Specifies the color to apply to the outline of a button. **Required Options:** You must select 'Outline' to enable this option.

**Outline width** — Specifies the width, in pixels, of the outline of a button. **Required Options:** You must select 'Outline' to enable this option.

**Scale image** — Automatically resizes the image you add to dimensions of the button.

**Style** — Specifies the geometrical edges of the panel.

- **Rounded rectangle** - Adds rounded corners to the rectangular shape of the button.
- **Rectangle** - Adds four right angles to the rectangular shape of the button.
- **Ellipse** - Adds an oval shape to the outer edge of the button.

**Tag** — Enables you to assign the selected button to a specific button, or tag group. When a button is assigned to a tag group, you can easily activate and deactivate multiple buttons at one time using the Activate Panel Button event in the Event Schedule function. Set up an Activate Panel Button event to activate a specific Tag, and all buttons assigned to that tag group are activated, no matter on what panel they reside. It is important to note that you must assign buttons to a specific tag group before you can utilize the Activate Panel Button event feature; therefore, it's best if you assign a button to a tag, when you first add the button to a panel. **Related Requirements: 1)** You set up Tags under Maintenance > System Settings > Tags. **2)** You set up an 'Activate Panel Button' event under Maintenance > System Settings > Event Schedules.

### Group Bar: Function

**Action** — Defines the action or function of the button. The action assigned to a button determines the behavior of the button and what happens on the POS terminal when an employee touches the button. Every new button has a button action of 'None' assigned, by default. Certain button functions require you to complete additional properties or access additional dialog boxes to properly configure the button. See "Appendix B: Button function descriptions" for a definition of each button function.

## Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the button. You can change the numbers for this property to move the button, as needed.

**X** — Indicates the X (horizontal) coordinate for the button. Change this number to move the button left or right.

**Y** — Indicates the Y (vertical) coordinate for the button. Change this number to move the button up or down.

**Size** — Indicates the width and height of the button. You can change the numbers for this property to resize the button, as needed.

**Width** — Indicates the width of the button.

**Height** — Indicates the height of the button.

## Image window properties

The following descriptions apply to the properties available for a bitmap image, in Panel Editor:

### Group Bar: Appearance

**Image** — Enables you to add an image as a button. Additional properties appear when you select Custom.

- **Custom** - Uses a custom image for the background of the button. **Related Options:** This option enables the 'Custom Image' option.
- **Information** - Inserts a lowercase letter 'i' for the background of the button, indication the concept of information.
- **Alert** - Inserts an exclamation mark inside a triangle for the background of the button. **Related Requirements:** You must enable the Alerts feature to use this feature.
- **Error** - Inserts a stop sign for the background of the button.
- **Scroll up** - Inserts an upward arch for the background of the button.
- **Scroll page up** - Inserts an upward arch and curve for the background of the button.
- **Scroll down** - Inserts a downward arch for the background of the button.
- **Scroll page down** - Inserts a downward arch and curve for the background of the button.
- **Scroll left** - Inserts a leftward arch for the background of the button.
- **Scroll right** - Inserts a rightward arch for the background of the button.
- **Enter** - Inserts a leftward broken arrow for the background of the button.
- **Backspace** - Inserts a leftward arrow for the background of the button.

**Custom Image** — Uses a unique image to add as a button. Click the drop-down list to select an image. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

**Transparent Image** — Displays the background of the image as the same color or image of the panel in which the button resides, creating a 3-D effect. This effect is useful when a color is defined or when bitmaps are attached to the screen in Screen Editor. **Required Options:** You must select 'Custom' from the 'Image' drop-down list to enable this option.

#### Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the bitmap image. You can change the numbers for this property to move the image, as needed.

**X** — Indicates the X (horizontal) coordinate for the image. Change this number to move the image left or right.

**Y** — Indicates the Y (vertical) coordinate for the image. Change this number to move the image up or down.

**Size** — Indicates the width and height of the image. You can change the numbers for this property to resize the image, as needed.

**Width** — Indicates the width of the image.

**Height** — Indicates the height of the image.

### Table window properties

The following descriptions apply to the properties available for a table, in Panel Editor:

#### Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the table. You can change the numbers for this property to move the table, as needed.

**X** — Indicates the X (horizontal) coordinate for the table. Change this number to move the table left or right.

**Y** — Indicates the Y (vertical) coordinate for the table. Change this number to move the table up or down.

**Size** — Indicates the width and height of the table. You can change the numbers for this property to resize the table, as needed.

**Width** — Indicates the width of the table. This option has a default value of 50.

**Height** — Indicates the height of the table. This option has a default value of 50.

## Group Bar: Table Settings

**Table Number** — Indicates the preexisting table you want to use in the floor plan layout. **Required Option:** You must have a table defined in Maintenance > System Settings > Table Definition before you can select it in the Properties window.

**Orientation** — Specifies the degree of angle position for the table. For example, you might want the table to display at a 90° angle on the floor plan. This option has a value range of 0 to 180.

**Pivot Seat Number** — Indicates the starting position number, if you use 'pivot seating' at your restaurant. This option has a position range between 1 and 8. The pivot seating position appears in light blue on the table. The diagram below displays pivot seating positions.

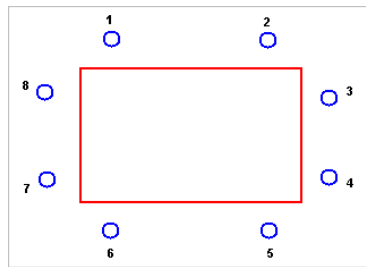


Figure 47 Pivot Seating Position

**Seat 1 Style** — Indicates the style of seat for side one of the table, such as a chair, bench, or booth. **Related Option:** If the seating style, which is configured in Maintenance > System Settings > Table Definition, is set to Round, you can only select Chair or None for this option. However, if the seating style is set to Square, you can select Chair, Bench, Booth, or None, for this option. **Required Option:** You must set the 'Show seats on panel' option, which is a Floor Plan panel property, to 'True,' or seats will not display around tables on your panel.

**Seat 2 Style** — Indicates the style of seat for side two of the table, such as a chair, bench, or booth. **Related Option:** If the seating style, which is configured in Maintenance > System Settings > Table Definition, is set to Round, you can only select Chair or None for this option. However, if the seating style is set to Square, you can select Chair, Bench, Booth, or None, for this option. **Required Option:** You must set the 'Show seats on panel' option, which is a Floor Plan panel property, to 'True,' or seats will not display around tables on your panel.

**Seat 3 Style** — Indicates the style of seat for side three of the table, such as a chair, bench, or booth. **Related Option:** If the seating style, which is configured in Maintenance > System Settings > Table Definition, is set to Round, you can only select Chair or None for this option. However, if the seating style is set to Square, you can select Chair, Bench, Booth, or None, for this option. **Required Option:** You must set the 'Show seats on panel' option, which is a Floor Plan panel property, to 'True,' or seats will not display around tables on your panel.

**Seat 4 Style** — Indicates the style of seat for side four of the table, such as a chair, bench, or booth. **Related Option:** If the seating style, which is configured in Maintenance > System Settings > Table Definition, is set to Round, you can only select Chair or None for this option. However, if the seating style is set to Square, you can select Chair, Bench, Booth, or None, for this option. **Required Option:** You must set the 'Show seats on panel' option, which is a Floor Plan panel property, to 'True,' or seats will not display around tables on your panel.

**Display Printed Check Icon (v6.5)** — Displays an indicator when the check is printed, in the form of a check mark to the left of the table number on the FOH floor plan. If you add an item to the check after it is printed, the system removes the check mark but the indicator reappears when you print the check again. **Related Options:** To display the time elapsed since the check was last printed, select 'View Time Since Last Check Printed' for the View Mode button function in Panel Editor.

## Wall window properties

The following descriptions apply to the properties available for a wall, in Panel Editor:

### Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the wall grid. You can change the numbers for this property to move the wall, as needed.

**X** — Indicates the X (horizontal) coordinate for the wall grid. Change this number to move the wall left or right.

**Y** — Indicates the Y (vertical) coordinate for the wall grid. Change this number to move the wall up or down.

**Size** — Indicates the width and height of the wall. You can change the numbers for this property to resize the wall, as needed.

**Width** — Indicates the width of the wall. This option has a default value of 100.

**Height** — Indicates the height of the wall. This option has a default value of 100.

### Group Bar: Wall Settings

**Style** — Indicates the shape and directional style of the wall. Click the drop-down list to select a pre-defined style.

**Curvature** — Specifies the degree of line curving and breaking points for the wall. **Required Option:** This option is available when style is set to right and left diagonal, right, left, bottom, and top arch styles. For left and right diagonal styles, the default is 0, but you can enter a curvature between -100 and 100. For top, bottom, left, or right arches, the default is 100, but you can enter a curvature between 0 and 100.

**Corners** — Indicates if the wall has rounded or square corners. **Required Option:** This option is available when style is set to horizontal, vertical, square, and circle styles.

**Thickness** — Specifies the depth of the wall. This option has a value range of 1-100. The default is 4.

**Color** — Enables you to select a color for wall, from a list of pre-defined colors. Additional properties appear when you select Custom.

## Button Grid window properties

The following descriptions apply to the properties available for a grid, in Panel Editor. After you define the number of buttons, you can use the other properties to further customize how the buttons inside the button grid should appear on the panel.

### Group Bar: Grid Settings

**Number of buttons** — Indicates the number of buttons you want to add to the button grid. You must specify the number of rows and columns

**Rows** — Indicates the number of rows in which to display the amount of buttons specified in 'Number of buttons.'

**Columns** — Indicates the number of columns in which to display the amount of buttons specified in 'Number of buttons.'

**Horizontal spacing** — Indicates how much space (in pixels) to include between each button inside the button grid.

**Vertical spacing** — Indicates how much space (in pixels) to include above and below each button inside the button grid.

**Button width** — Indicates the exact width (pixels) of each button inside the button grid.

**Button height** — Indicates the exact height (pixels) of each button inside the button grid.

**Border width** — Indicates how wide of an invisible border to place around the buttons inside the button grid.

**Aspect ratio** — Indicates the displayed width of each button, divided by its height. The aspect ratio is used to auto-calculate the number of rows, when only the 'Number of buttons' option is defined.

### Group Bar: Layout

**Location** — Indicates the X (horizontal) and Y (vertical) position coordinates for the button grid. You can change the numbers for this property to move the button grid, as needed.

**X** — Indicates the X (horizontal) coordinate for the button grid. Change this number to move the grid left or right.

**Y** — Indicates the Y (vertical) coordinate for the button grid. Change this number to move the grid up or down.

**Size** — Indicates the width and height of the grid. You can change the numbers for this property to resize the grid, as needed.



## Appendix B: Button function descriptions

Appendix B provides a description for each action you can assign to a button, in Panel Editor. The button functions are listed in alphabetical order:

**Add/Edit Gratuity** — Enables you to add or edit the amount of gratuity on a guest check. This button function is available only for the 'Close Screen' panel type and provides the same functionality as the button by the same name on the hard-coded Close screen that appears in Table Service. **Related Options:** To allow an employee to add/edit the gratuity, access Maintenance > Labor > Pos Access Levels, select 'Assign gratuity' under the 'Financial' group bar, and assign the access level to the employee. **Documented Version:** v14.1.

**Adjust Payments** — Enables adjustments to the tender information for a guest check. If the check is already closed, you must recall and reopen the check and display it on the screen before you can make an adjustment.

**Adjust Tips** — Enables adjustments to tip information for a guest check. This is typically used for guest checks paid with a credit card. If the check is already closed, you must recall and reopen the check and display it on the screen before you can make an adjustment.

**Alerts** — Enables you to view pending alerts (i.e. overtime alerts, break alerts, etc.).



### Reference

Refer to the [Alerts Feature Focus Guide - HKS334](#) for more information on configuring and using alerts.

**Alternate Language GC Receipt** — Enables you to toggle between English and French, when printing and reprinting the guest check or receipt. An identifier appears in the upper right corner of the button: E for English or F for French.

Default language — Indicates the language chosen to print for the gift card receipt each time you start a new check.

### To add an Alternative Language GC Receipt button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Alternate GC Receipt** from the 'Action' drop-down list. This is the
3. Select the **language** you want in effect each time you start a new check from the 'Default language' drop-down list.

**Apply Party ID** — Provides a button that the employee may enter, change, or update a party ID. Once touched, the Enter Party Code screen appears and the employee can touch backspace to remove an incorrect party ID, or simply enter a party ID.

**Assign Menu** — Allows you to make another menu available to an employee when a guest wants to order items that are not available on the current menus. An Other Menu button appears on the order entry screen for the duration of the current guest check for the selected table. **Related Options:** To allow an employee to assign another menu, access Maintenance > Labor > Pos Access Levels, select 'Assign menu' under the 'Financial' group bar, and assign the access level to the employee.

**Assign Price Change** — Enables an employee with sufficient access to override the current price in effect on an order with a price change defined in Maintenance > Pricing > Price Changes. Only valid price changes, where today's date is between or inclusive of the start date and end date defined for the price change appear for selection.

**Automation Script** — Enables the system to call or start a VB script from a POS terminal. This function calls a one script file with an extension of .vbs and the files should be kept in a new \Aloha\Scripts directory. The \Scripts directory must reside on the POS terminals and be synchronized with the other updated directories from the file server. An additional option appears when you select the Automation Script button function.

Script To Run — Specifies the command line of the automation script file you want to run.

**To add an Automation Script button:**

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Automation Script** from the 'Action' drop-down list.
3. Select the **script file** you want to run from the 'Script To Run' drop-down list.

**Break** — Opens the FOH Clock-Out screen to enable an employee to select a paid or unpaid break.

**Chain** — Links to one or more panels on a screen. For example, restaurants typically use a chain button to link from the Order panel to the Payment panel. When a cashier completes an order, they press a chain button that opens the Payment panel to apply payment and close the order. You can also use the Chain button function as a Back button to return you to a previous panel, or as a Navigation button that takes you to an entirely new screen (when you chain the button to multiple panels). Additional options appear when you select the Chain button function.

Panels to display — Specifies the panel(s) to which the current button links. You must click the ellipses button (...) to select one or more panels on the Panel Selection dialog box.

### To add a Chain button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Chain** from the 'Action' drop-down list.
3. Click **Panels to display**, then click the **ellipses button (...)**. The Select Panels dialog box appears.



Figure 48 Select Panel Dialog Box

#### Tip

You can create a Chain button that navigates you to a single panel, or a group of panels.

4. Select the **panel** for the system to open when this button is touched on the POS terminal and click the **greater than sign (>)**. A thumbnail image of the panel you select, as well as the panel number and name, appear on the right side of the Select Panel dialog box.

#### Tip

To remove a panel within a chain function, select the panel you do not want from the 'Selected Panels' list box and click the less than sign (<).

5. Click **OK**. The selected panel name appears in the Button Properties dialog box.
6. Select **Panel > Save Panel**.

**Checkout** — Opens the “Are you sure you want to check out?” screen, which enables you to run the checkout process. Additional options appear when you select the Checkout button function.

Automatically print checkout — Indicates you want to print the checkout report automatically when the employee completes the checkout process. The default is ‘False.’

Automatically open drawer — Indicates you want to open the cash drawer automatically when the employee completes the checkout process. The default is ‘False.’

**To add a Checkout button:**

1. Add a **new button**, or select an **existing button**.
2. Under the ‘Function’ group bar, select **Checkout** from the ‘Action’ drop-down list.
3. Select Automatically print checkout if you want to print the checkout report upon checkout.
4. Select Automatically open drawer if you want the drawer to open upon checkout.

**Clear Modifiers** — Removes all modifiers added to an unordered item and reverts the menu item back to a single-entry state. Use this button function when you have a large number of modifiers added to an item and you want to remove them. You cannot use this function within a script.

**Clock Out** — Enables you to clock out of the system. An employee must perform a checkout, if applicable, before they can clock out. An additional option appears when you select the Clock Out button function:

Skip Clock Out/Break Screen — Bypasses the Clock Out/Break screen. This is utilized in environments that use drawer checkouts. This option is obsolete for POS v6.5 and above. **Documented Version:** v6.2.

**Combine Tables** — Enables the employee to combine two or more tables.

**Count** — Allows you to add or remove a modifier item from a menu item based on the remaining options in the ‘Function’ group bar.

Count type — Stipulates whether the button applies the count of the modifier item to the menu item, clears the count of the modifier item from the menu item, or displays the current count of the modifier item on the modifier panel.

- Select ‘Apply count’ to apply the next modifier item you select to the menu item using the number stipulated for this button in ‘Count.’ For example, for the ‘10 Wings’ menu item, if you touch a button defined with a ‘Count’ of 5 and then touch the ‘Hot’ modifier item, the system indicates the customer wants five of the ten wings modified with the ‘Hot’ modifier item. **Related Options:** This option enables the ‘Count’ and ‘Append’ options.
- Select ‘Clear current count’ to reset the current count of the modifier item back to 0 (blank).

- Select 'Display current count' to display the currently selected count of the modifier item on the modifier panel. If the count is zero, the button is blank.

**Count** — Provides a method by which you enter a specific quantity for a modifier item. Specify the quantity, from 1 to 999, of the modifier item to apply when you touch this button. **Required Options:** You must select 'Apply count' from the 'Count' drop-down list to enable this option.

**Append** — Enables you to enter a quantity greater than nine for a modifier item by appending each number to the end of the prior number. For example, you can enter a quantity of 12 for a modifier item by touching the 1 and then the 2 count buttons before touching the modifier item. **Required Options:** You must select 'Apply count' from 'Count type' to enable this option.

**Course** — Enables you to assign a course to an item on a guest check. Use this function with the course ordering feature.



### Reference

Refer to the [Course Ordering Feature Focus Guide - HKS312](#) for more information on ordering with courses.

**Custom Activity** — Enables you to communicate with an externally integrated software package through COM interface. An additional option appears when you select the Custom Activity Interface button function.

**Custom Text** — Specifies the text to send to the external application.

### To add a Custom Activity button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Custom Activity** from the 'Action' drop-down list.
3. Type the text to send to the external application.

### Custom Text options:

**RADIANT\_LOYALTY\_PLUGIN** — Provides access to the main loyalty screen.



### Reference

Refer to the [Generic Loyalty Using BSL Feature Focus Guide - HKS528](#) for a complete list of the Custom Activity buttons supported by this feature.

**ORDER\_ENTRY\_COMPLETE/LU** — Creates a button to go from the floor plan screen to the ATO Lookup screen. Other available switches include:

- /PU to access the Pick Up screen
- /DP to access the Dispatch screen
- /DM to access the Driver screen
- /FD to access the Future screen
- /MP to access the Map screen

**FLEX\_ENTRY\_COMPLETE/LU** — Creates a button that navigates to the ATO Lookup Screen. The same switches available for ORDER\_ENTRY\_COMPLETE are also available for this one.

**FLOW\_ORDER\_TO\_TAKEOUT** — Used when scheduling a future order to display the Customer Selection screen.

**APPLY\_PENDING\_PAYMENTS** — Enables the system to apply a stored payment from Aloha Takeout to the current check in the on-screen guest check window. Additionally, with the ability to tender an order from the review check window, you can add an /RC extension (switch) to the custom activity button to apply the stored payment to the check in the review check window. This is supported in Aloha Quick Service only.

**ORDER\_CHECK\_IN** — Provides ability to perform manual check-ins from the Aloha POS system.

**CANCEL NEW ORDER** — Cancels an order in both Aloha Takeout and in the Aloha POS when you start the order in Aloha Takeout.



#### Reference

Refer to the [Aloha Takeout Implementation Guide - HKS326](#) for more information on configuring the Custom Activity buttons available for use with ATO.

**EFREQ\_DYNAMIC\_COMP** — Allows an employee with the appropriate access level to activate a comp card and enter a value at the time of activation.



#### Reference

Refer to the Aloha POS v14.1 Enhancement Release Guide for configuration details.

**GETMPCODE** — Provides the ability to generate an on-screen six-digit alphanumeric code to provide consumers and allow them to pay their guest check using their phone.

**GETMPPHONE** — Provides the ability to request and capture a phone number to which to send a text message.



### Reference

Refer to the [Mobile Pay Implementation Guide - HKS1474](#) for configuration details.

**Custom Report** — Enables you to add a custom report button to display the FOH Select Report screen on the FOH. **Documented Version:** v7.0.

**Select Employees** — Allows you to select specific employees to include in the report data. If set to False, the system generates data for all employees who worked at the store during the time frame selected for the report. **Documented Version:** v7.0.

**Report definition file** — Specifies the report configuration file name (with a .cfg extension) located in the Data directory to which this button is linked. If you do not link the button to a report configuration file, the button does not generate a report. **Documented Version:** v7.0.

#### To add a Custom Report button:

1. Add a **new button**, or select an **existing button**.
2. Under the 'Function' group bar, select **Custom Report** from the 'Action' drop-down list.
3. Select **True or False** from the 'Select Employees' drop-down list to enable you to select specific employees to include in report data.
4. Type the **report definition file** that links to this report button.

**Customer Information** — Opens the delivery screen to review customer information, if the Delivery/Frequent Buyer program is in use, to allow you to assign a member to the check. You can use within a script to prompt for customer information (member assignment) when the cashier enters the order and selects the order mode. **Documented Version:** v14.1. An additional option appears when you select the Customer Information button function.

**Customer Information Type** — Specifies the type of customer information is Aloha Loyalty Member.

**Dashboard** — Allows you to display a dashboard on demand by touching a button you configure on a submenu panel or a floor plan panel. The system automatically adds Back and Exit buttons. Touching Back returns you to the previous screen, and Exit returns you to the floating logo or the logout screen. **Documented Version:** v14.1.

**Delete** — Behaves differently on the POS, depending on the context in which it is used. If you select nothing on the guest check, the system deletes the last unordered item on the check. If you select an unordered item on the check, only that item is deleted. If one of these scenarios affects an ordered item, it becomes a void, prompting for a void reason. An additional option appears when you select the Delete button function.

Multi-Delete Options — Specifies a specific delete option. **Previous Item** deletes the last ordered or selected item. **Previous Like Item** deletes the last ordered or selected item along with a quantity function. This function behaves the same way as ordering items in quantity. For example, if 21 cookies are selected, but 15 is the actual amount, select the quantity 6, then select a button assigned with the Delete Previous Like Items function. Six cookies are deleted and the guest check window displays 15 cookies.

**Delivery TableService** — Activates the delivery screens if using Aloha Delivery/Frequent Buyer.

**Detach Tables** — Enables the employee to detach tables that have been combined.

**Dynamic Comp** — Allows you to activate a comp card and enter a value for the comp card.

**Required Options:** To allow an employee to use the Dynamic Comp button to activate and enter a value for a comp card, access Maintenance > Labor > Pos Access Levels, select 'Approve Aloha Loyalty card assignment' under the 'Financial' group bar, and assign the access level to the employee.

**Documented Version:** v14.1.

#### To add a Dynamic Comp button:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer** or **Table Service Designer**.
2. Select **Work with Panels**.
3. Select **Panel > Open Panel**, select a **panel**, and click **OK** (QS only) or select **Panel > Open Panel**, select a **Floorplan panel** or **Order Entry panel** to edit, and click **OK** (TS only).
4. Select an **available button** or create a **new button**. The Properties dialog box appears.
5. On the Properties dialog box, select **Script** from the 'Action' drop-down list.
6. Click **None** in Script Actions and then click the **ellipsis (...)** to display the Edit Script Actions dialog box.
7. Click **Add**.
8. Under the 'Function' group bar, select **Just-in-time Manager Approval** as the 'ActionType.' This enables 'POS Access Levels.'
9. Click the **ellipsis (...)** to display the Select POS Access Levels dialog box.
10. Select one or more **access levels** for which to provide the ability to add value to a dynamic comp card, and click **OK** to return to the Edit Script Actions dialog box.
11. Click **Add** again on the **Edit Script Actions** dialog box.
12. Under the 'Function' group bar, select **Custom Activity** as the 'Action Type.'



13. Click the **Custom Text** drop-down arrow, type **EFREQ\_DYNAMIC\_COMP** and click outside the box to exit and save the entry.
14. Click **OK**.
15. Under the 'Appearance' group bar, type a name for the button, such as 'Add Value\nGC.' To display text on multiple lines, insert '\n' without spaces for line breaks.
16. Configure the **remaining options** as you would for any other button.
17. Select **Panel > Save All Panels**.
18. Exit the **Screen Designer** function.

**Dynamic Text** — Displays dynamic button text that is purely informational; you cannot select the button itself. The text that appears on the button changes depending on the type selected for the action. In Aloha Quick Service, you can place this button on any panel. In Aloha Table Service, you can only place this button function on a submenu panel.

Type — Determines the type to use for the Dynamic Text button function. Select from 'Banner Text,' 'Amount Due,' or 'Item Countdown.'

- Select 'Banner Text' to automatically change the text on the button to the name of the item, modifier, or quick combo currently selected in the on-screen guest check, or the last item on the check, if an item is not selected first. The text used on the button is a combination of the text defined in the 'Text' field on the Properties dialog box, followed by the selected element in the on-screen guest check. For example, if you type 'Modify:' in the 'Text' text box, and select the 'Melt' item in the on-screen guest check, 'Modify: Melt' appears on the button. If you select a quick combo component, the name of the associated quick combo appears, instead of the component. If you select multiple items in the 'on-screen guest check, or you have not added items to the check, no text appears on the button. If you do not select any items on the check, the name of the last entered item or quick combo appears on the button. The Banner Text button is not supported with the review check panel.
- Select 'Amount Due' to display the amount due of the transaction on the button.
- Select 'Item Countdown' to allow the button to display the number remaining to fulfill the group quota. Example: 6 remaining. The system bases the count upon the total number of items from the category that are on the check. **Related Options: 1)** You can configure item countdown buttons with different dynamic text in a single database, so the POS can monitor

several different categories, such as sales, retail, and non-sales categories. **2)** Selecting 'Item Countdown' enables 'Prompt Threshold,' 'Prompt Amount,' and 'Prompt Category.'

**Prompt Threshold** — Designates the amount, up to two digits, at which to initiate Item Countdown to appear on the order entry screen. Zero is not a valid number. Once you reach the amount, the button displays the remaining amount required to fill the group quota amount. **Required Options:** You must select 'Item Countdown' in 'Type' to enable this option.

**Prompt Amount** — Designates the fulfilled group quota amount, up to two digits. Zero is not a valid number. Once you meet the prompt amount, the item countdown no longer appears, unless the guest continues the remaining group quota. The Prompt Amount number must be higher than the amount in 'Prompt Threshold.' **Required Options:** You must select 'Item Countdown' in 'Type' to enable this option.

**Prompt Category** — Designates the category for which you want the Item Countdown to perform the countdown. Every item from the prompt category counts against the prompt amount. The drop-down list displays all sales, retail, and non-sales categories for quick-service environments, and all sales, retail, non-sales, and suggestive categories for table-service environments. **Required Options:** You must select 'Item Countdown' in 'Type' to enable this option.

**Equal Pay** — Enables you to split the check into equal payment amounts, based on the number you enter at the prompt. This button function is available only for the 'Close Screen' panel type and provides the same functionality as the button by the same name that appears on the hard-coded Close screen in Table Service. **Related Options:** You must access Maintenance > Labor > Jobcodes > Financial tab and select 'Display equal payment on close screen' under the 'Financial' group bar for the button to appear on the hard-coded Close screen or on the customized close screen panel, whichever is in use.

**Exit** — Logs an employee out of the system and returns to the logon screen.

**Fraction** — Enables you to specify a portion of the pizza for order entry. **Documented Version:** v6.7.

**Item** — Specifies the item that represents the portion of the whole pizza represented by this button. This option has no effect when configuring the Pizza Modifier screen. **Related Requirements:** Only items you associate with a fraction in Maintenance > Menu > Items under the 'Pizza' group bar on the Item tab appear in the list for selection. **Documented Version:** v6.7.

**Fundraiser** — Allows you to support your community by associating sales with a specific fundraiser.

**Get Check** — Opens the FOH Enter Check Number screen, enabling the employee to get an open check for tendering.

**Gift Card Balance Query For Tender** — Allows you to perform a balance inquiry for an Aloha Stored Value gift card that does not have an ePin. Use this button function if an ePin is not present on the card, and use the existing Query Gift Card Balance button function for cards that contain an ePin. ePins increase fraud protection and require the entry of a security validation code on the Front-of-House (FOH). This button function is only available for panels of the Submenu type. **Related Options:** This option exposes the 'Tender' option. **Documented Version:** v19.9

Tender — Specifies the Aloha Stored Value tender to use. **Required Options: 1)** You must select 'Gift Card Balance Query for Tender' from the 'Function' drop-down list to enable this option. **2)** You must use an ASV tender that has 'Require code entry' cleared in Maintenance > Tenders > Security Verification tab. **Documented Version:** v19.9

**Gift Card Cash Out** — Provides a means for obtaining the remaining balance on a gift card and approval from a processor when a guest requests the balance back as cash, without having to open a guest check. This feature is available for the Givex processor only and requires an updated UPI plugin. **Related Options:** To allow an employee to cash out a gift card without manager approval, access Maintenance > Labor > Pos Access Levels, select 'Enable cash out from gift card' under the 'Financial' group bar, and assign the access level to the employee. **Related Requirements:** To assist with employee reporting of cash given to guests requesting the balance of a gift card in cash back, access Maintenance > System Settings > Petty Cash Account and create a paid out petty cash account specific to that gift card. **Documented Version:** v15.1.

#### To add a Gift Card Cash Out button:

1. Select **Maintenance > Screen Designer > Quick Service Screen Designer** or **Table Service Screen Designer**.
2. Select **Work with Panels**.
3. Select **Panel > Open Panel**.
4. If using Quick Service, select a **panel** to edit, and click **OK**.
5. If using Table Service, select the **floor plan panel** or **order entry panel** to edit, and click **OK**.
6. Select an **available button** or create a **new button**. The Properties dialog box appears.
7. Under the 'Function' group bar, select **Gift Card Cash Out** from the 'Action' drop-down list.
8. Select the **gift card processor** from the drop-down list.
9. Select the **petty cash account** created for tracking the gift card cash outs from the drop-down list.
10. Under the 'Appearance' group bar, type a **name** for the button, such as 'Givex\nCash\nOut.' To display text on multiple lines, insert '\n' without spaces for line breaks.
11. Configure the **remaining options** as you would for any other button.
12. Select **Panel > Save All Panels**.
13. Exit the **Screen Designer** function.

**Hold** — Enables you to place a selected unordered item on hold. You can configure the button to use standard hold functionality, which requires you to manually release an item from hold, or to use options that automate the release of items on hold, referred to as Delay Send. The Hold button function appears in the list only when you create a panel of the Order Entry type.



### Reference

Refer to the [Delay Send Feature Focus Guide - HKS305](#) for more information.

**Hold Release Mode** — Designates whether this is a Hold button that uses standard functionality, or if it is a custom Hold button that uses Delay Send functionality.

- Select 'Manual Release' to designate this is a standard Hold button that is to operate as normal.
- Select 'Automatic Release' to designate this Hold button as a custom Hold button, typically added to a custom panel of the Order Entry type, for which you will use Delay Send. **Related Options:** Selecting this option enables 'Hold Time,' 'Hold Time Usage,' and 'Default Order Mode.'

**Hold Time** — Establishes the minimum length of time to hold an item before automatically releasing it to the kitchen. Select a value from the drop-down list. Your choices are between 1 and 20 minutes, then five-minute intervals between 25 and 60. The default is 1 minute. The system determines the release time for the item by adding the number of minutes to the current system time. For example, if the 'Hold Time' is 20 and the current system time is 7:35, the release time that appears in the guest check window is 7:55.

**Hold Time Usage** — Determines how the system uses the value in 'Hold Time' to determine the release time when you place an item on hold in the FOH.

- Select 'Use Hold Time As Increments' to use the value in 'Hold Time' as an increment of time by which to increase or decrease the length of time to hold an item. The Release Information Screen that appears provides up and down arrows that allow you to increase or decrease the hold time by the designated increment of time only. For example, if 'Hold Time' is 10, you can press the up arrow once to increase the hold time from 10 to 20 minutes, press it twice to increase the hold time to 30 minutes; however, you cannot exceed the number of minutes you define for 'Hold Time Limit.' You also cannot exceed the number of resets specified in 'Maximum number of hold time extensions resets.'
- Select 'Use Hold Time As Default' to use the value in 'Hold Time' as a hard value at which to set the length of time to hold an item. To increase or decrease the hold time, you must

reselect the held item in the guest check window and touch Hold again; you cannot exceed the number of resets specified in 'Maximum number of hold time extensions resets.'

 **Note**

The Release Information Screen appears, for order mode selection only, for Hold buttons for which you select 'Use Hold Time As Default' and leave the 'Default Order Mode' at None; the up and down arrows for increasing or decreasing the hold time are not available on this screen.

**Hold Time Limit** — Specifies the maximum number of minutes you can keep an item on hold. The minimum value is 60 minutes; the maximum value is 480 minutes (eight hours). **Related Options:** Selecting 'Use Hold Time As Increments' enables this option.

**Default Order Mode** — Specifies the default order mode to which to commit an item when it automatically releases from hold. If you do not select a default order mode, the Release Order Information screen requires the selection of an order mode before you can continue.

**Item Lookup** — Opens an item lookup screen used to search all items in the database, even if they do not appear on a panel. When you touch the Item Lookup button, a list of items and a keypad appear. As you enter the item number or description, the list displays only those items that match the characters you enter. You can continue to enter characters or select an item from the list. After you select an item, the item number, item description, and price appear.

**Just-in-time Manager Approval** — Enables you to add the manager approval screen within a script to require manager access to a function. When you define the script, use the JIT Approval button function just prior to the button function for which you require manager approval, and select the access levels that can perform the function without manager approval. When you select the scripted button on a POS terminal, the system determines if the employee has sufficient access to run the next function in the script. If yes, the system continues with the next function in the script. If no, the Manager Approval screen appears. An employee with sufficient access must enter their password to continue. If the entered password is not valid, an error message appears and the screen returns to the order entry screen. An additional option appears when you select the Just-in-time Manager Approval button function.

 **Note**

Since the Manager Approval function has no value as a standalone button function, you should always include it within a script, and add it before the function for which you require manager approval. Additionally, the text, background, and bitmap options on the Edit Buttons - JIT Approval dialog box do not display on the POS when you do not include the JIT Approval button in a script.

**POS Access Level** — Indicates the access levels allowed to perform the function without manager approval.

**Modifier Code** — Specifies a preceding preparation code for item modifiers, such as No, Extra, Side, etc. You must touch this button before an order modifier. An additional option appears when you select the Modifier Code button function.

Modifier Code Type — Selects the modifier code to apply to the next modifier item you enter.

**Modify** — Opens the FOH Modify screen for the selected menu item on the order. If no modifiers are attached to the selected menu item, the screen appears with no modifiers to select.

**New Tab** — Allows you to name an order and start a running tab. If used by a server, the FOH Name Tab screen appears. If used by a bartender, the FOH Order Entry screen appears with the additional bartender function buttons.

**None** — Designates the button is not in use at this time. You can use this button to add a title to the panel.

**Open Drawer** — Opens the cash drawer.

**Order Item** — Adds a menu item to the current order. An additional option appears when you select the Order Item button function.

Item — Indicates the menu item to add to the guest check.

**Order Modifier** — Adds a modifier item to the current order. This provides modifications to a selected menu item or to the last item ordered. Note: This does not invoke the forced system modifiers activated by the Modify function. An additional option appears when you select the Order Modifier button function.

Modifier Item — Indicates the modifier menu item to add to the guest check.

### Note

The 'Item' and 'Modifier Item' list boxes use the same items defined in Maintenance > Menu > Items and conform to the pricing hierarchy. You can select an item for both an order item and an order modifier; however, you must place an order modifier in a modifier group and the group must be attached to the item it modifies.

Fill remaining count — Adds the modifier item to the menu item based on the remaining quantity of modifiers needed to fulfill the minimum required for the modifier group. For example, if the modifier group requires you to select a minimum of 10 modifiers, and you have already selected five, the system adds the selected modifier to the check using a quantity of five. If you select a count prior to selecting the modifier, the system ignores 'Fill remaining count' and adds the modifier based on the selected count.

**Order Type** — Specifies the order mode to assign to the button, as defined in Maintenance > Menu > Order Modes. You can assign a default order mode to an order queue in Maintenance > System Settings > Order Queues. Assigning this eliminates the need to select the same order type for every transaction. An additional option appears when you select the Order Type button function.

Order Mode — Specifies the order mode to assign to the customer order.

**PLU List** — Opens a numeric keypad on the POS terminal, to enter an ID number for an item, if known, to order the item. Additional options appear when you select the PLU List button function.

Confirm Item — Adds a POS confirmation prompt asking if you want to order the item at the specified price.

Chain Open Item — Opens the FOH Open Item screen for entering a description and a price if the PLU item number is not defined in Maintenance > Menu > Items.

Open Item — Associates with the PLU list function. This works in conjunction with the 'Chain to Open Item if Not Found' check box and the list box displays a list of all items that have 'Ask for Price' selected in Maintenance > Menu > Items > Pricing tab.

**To add a PLU list button:**

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **PLU List** from the 'Action' property drop-down list. Additional options appear.
4. If desired, select **True** from the 'Confirm Item' property drop-down list to add a POS prompt confirming you want to order the item at the specified price.
5. If desired, select **True** from the 'Chain to Open Item if Not Found' property drop-down list to open the POS Open Item screen for entering a description and a price if the PLU item number is not defined in Maintenance > Menu > Items.
6. Select an **open item** from the 'OpenItem' property drop-down list, to attach to the PLU list function. This works in conjunction with the 'Chain to Open Item if Not Found' property. The drop-down list displays items with 'Open Item' selected in Maintenance > Menu > Items.

**PMS Check** — Enables the employee to start a check with a PMS room inquiry. This function is available only when PMS is active at a site, and you select the 'Can start PMS check' option for the job code in Maintenance > Labor > Jobcodes.

**PMS Inquire** — Enables inquiries about the status of a guest, to determine whether the guest is registered at the hotel and has the authority to charge orders to his or her room. This option works in conjunction with the PMS Interface product.



### Reference

Refer to the Aloha PMS Integration Guide for more information on configuring and using the PMS interface.

**Print Message** — Enables the system to print a 'general message' type configured in Print Designer from the front-of-house. Use as a standalone to print the message on demand, or in conjunction with a script when using Campaign Rulebook. **Documented Version:** v14.1.

**Print Receipt** — Prints a receipt for the current order. An additional option appears when you select the Print Receipt button function:

Print Receipt Option — Specifies whether to print the current guest check or separate receipts for all guests in a party. Select 'Selected (Single)' to configure the button to print the current check appearing in the guest check window only. If using split checks, you can use this button function to print a separate receipt for each guest in a party as you progress through the order. Select 'All' to configure the button to print a separate receipt for all guests in a party with one button touch, after you enter the entire order.

**Promo Lookup** — Enables you to select a promo to apply to the guest check. Only promotions that are 'Active,' and meet the start and end date criteria in the Promotions dialog box appear for selection. Additional options appear when you select the Promo Lookup button function. This button function is available only for the 'Close Screen' panel type and provides the same functionality as the button by the same name on the hard-coded Close screen. **Documented Version:** v14.1.

Use Quick Lookup Screen — Enables you to enter search criteria using an alphanumeric keyboard, to select an active promotion to apply to the guest check. If cleared, the list of promotions appear on continuing pages.

Display eligible Promos only — Displays only promotions that are eligible for the items on the check on the FOH Promo Lookup screen. If set to False, the screen lists all defined active promotions. **Required Options:** You must select 'Promo Lookup' from the 'Action' drop-down list to enable this option.



**Quantity** — Applies a multiplier to a selected item or the last item ordered, according to the number entered in the 'Quantity' text box. Additional options appear when you select the Quantity button function.

Quantity — Specifies the quantity multiplier for the quantity button. If you enter zero (0), a POS numeric keypad appears and prompts for a quantity.

Append — Enables you to enter a quantity greater than nine by appending each number to the end of the prior number. For example, when you select this option, you can ring up 12 burgers on the POS terminal by touching 1 and 2 on the Quantity panel before you order the burger menu item.

The Quantity button enables you to order multiples of an item with the press of a single button. The system applies a multiplier to a selected item or the last item ordered, according to the number entered in the 'Quantity' text box. Additionally, when you select the 'Append' property, the button enables you to enter double-digit quantities. For example, to order 12 burgers, touch buttons 1 and 2. A quantity panel, which is usually created as a vertical or horizontal bar, should be part of the default screen.

#### To add a Quantity button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Quantity** from the 'Action' property drop-down list. Additional options appear.
4. Click the **left column** of the 'Quantity' property and in the right column, type the quantity multiplier for the button. This option has a valid range of 0-9. If you type zero (0), the POS terminal displays a numeric keypad and prompts for a quantity.
5. Select **True** from the 'Append' property drop-down list, to enhance the function with the ability to select double-digit entries.

#### Note

If you do not want the system to prompt for the quantity using the numeric keypad, you must create a different button for each quantity you want available on the POS terminal.

**Quebec Fiscal Printing** — Enables you to create the buttons necessary for meeting Revenu Quebec fiscal requirements. Using this button function, you can create the buttons necessary for entering a package deal, a group event, or printing a duplicate copy of a guest check for your records. **Documented Version:** v12.3.

**Package Deal** — Required for entering the sale of a package deal into the system. A sale is considered a package deal when you include a meal with a service, such as in a dinner theatre. The Package Deal button sends an identifier indicating the sale is a package deal to the sales recording module (SRM). You must also access Maintenance > Payments> Promotions and create a comp that discounts the package deal 100%. **Documented Version:** v12.3.

**Group Event** — Required for entering the sale of a group event into the system. A sale is considered a group event when you provide meals to a group of people under a written and signed agreement with the customer, such as for a wedding reception or banquet. The Group Event button sends an identifier indicating the sale is a group event to the sales recording module (SRM). You must also access Maintenance > Menu > Items and create a zero-priced (item with a price of \$0.00) to associate with the occasion. This is necessary because the POS system requires you to add at least one item to the guest check before you can close the check. **Documented Version:** v12.3.

**Duplicate Guest Check** — Provides the ability to print a duplicate copy of the guest check for the merchant to retain. **Documented Version:** v12.3.



### Reference

Refer to the [Revenu Quebec Fiscal Requirements Feature Focus Guide - HKS378](#) for more information.

**Query Cash Card Balance** — Queries the remaining balance on a cash card. The balance of the card prints to the local receipt printer and does not appear on the POS screen.

**Query EBT Card Balance** — Enables you to connect with the host and query the remaining balance of an electronic benefits transfer (EBT) card. The balance of the card prints to the local receipt printer and does not display on the FOH screen. Select from 'Cash Benefits' or 'Food Stamps' to specify the EBT tender type to query.

**Food Stamps** — Specifies this EBT card balance queries the host to check the available amount on a SNAP benefits card.

**Cash Benefits** — Specifies this EBT card balance queries the host to check the available amount on a Cash Benefits card.

**Query Gift Card Balance** — Connects with the gift card host and queries the remaining balance of a gift card. The balance of the card prints to the local receipt printer and does not appear on the POS screen. Use this button function if the gift card requires the entry of an ePin in the FOH. For Table

Service, you must add this button to a customized panel on the Order Entry screen or a Floor Plan in use. Refer to the Gift Card Balance Query For Tender button function for gift cards where an ePin is not present on the card.



### Reference

Refer to the [Customized TS Order Entry Screen Feature Focus Guide - HKS349](#) for more information on how to create a custom panel.

**Quick Count** — Configures counting options used with the Quick Count feature. An additional option appears when you select the Quick Count button function.

**Type** — Specifies the type of count to track.

- Select 'Opening Counts' to open the FOH Open Counts screen with the list of tracking items with 'Open Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.
- Select 'Add Counts' to open the FOH Add Counts screen with the list of tracking items with 'Add Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.
- Select 'Usage Counts' to open the FOH Usage Counts screen with the list of tracking items with 'Use Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.
- Select 'Waste Counts' to open the FOH Waste Counts screen with the list of tracking items with 'Waste Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.
- Select 'Close Counts' to open the FOH Close Counts screen with the list of tracking items with 'Close Counts' selected, as defined in Maintenance > Quick Count > Tracking Items.



### Reference

Refer to the [Quick Count Feature Focus Guide - HKS316](#) for more information on configuring and using the Quick Count feature.

**Recipe** — Opens the FOH Recipe screen and enables you to view and print available recipes for items.

**Refund** — Places the system in 'refund mode' so you can apply a refund to a guest check. In refund mode, you open a separate check and ring up the items you want to refund. The item prices and sub-total appears as a negative amount. You need to select the Close Check button to close the check and take the system out of refund mode, which reverts all guest check entries and subtotals to back to positive amounts. (You cannot use a Tenders function to close out a refund check because tender function buttons do not understand negative amounts.)

**Release Locked Employee** — Enables you to clear the .olk file that occurs when an employee logs in and allows the employee to log back in to the system. This happens when the system loses connectivity when the employee was currently logged in. This issue only occurs with handhelds and other devices running through the COM interface.

**Rename Tabs and Tables** — Enables you to rename a table or tab and provide an entry point for when you can slide a payment card across a magnetic stripe reader and capture payment information.

**Repeat** — Repeats the selected item. You define the behavior using the following:

Display Quantity Keypad — Displays the quantity keypad when you select the Repeat button and an item or quick combo is entered on the check. **Documented Version:** v6.7.

Include Selection in Quantity — Counts the selection in the guest check window when you quantify an item or quick combo, using the Repeat button. For example, if you select an item or quick combo in the guest check window and quantify the item by 3, the system adds 2 new copies of the item or quick combo to equal 3. If you clear this option, the system adds 3 new copies of the item or quick combo to equal 4. **Documented Version:** v6.7.

**Report Break Alert** — Displays the FOH Break Alert report, which shows the employees who have worked continuously without a break, based on predefined rules.

**Report Restaurant Sales and Labor Statistics** — Produces the Restaurant Sales and Labor Statistics report in the FOH. The name you enter in the 'text' field displays as the report title. **Documented Version:** v7.0.

**Report Site Information** — Displays the following site information: Site name; Site number; Site address; Site phone number; Number of terminals, kitchen screens, and printers; CMC ID; EDC, Connected Payments, and/or APS credit card processing software; Company ID; Store ID; and License ID. Select an order entry panel or a floorplan panel (TS only) or any panel (QS only). **Related Options:** To disable the Site Info button on the login screen, clear 'Enable Site Information button on login' under the 'Troubleshooting' group bar in the System group on the Store Settings tab in Maintenance > Business > Store.

**Reprint Check** — Prints the check.

**Reroute Display Board** — Opens the Display Board Routing screen and enables you to change how the display board routes. Additional options appear when you select the Reroute Display Board button function.

**Reroute Display Board Type** — Indicates the type of display board routing to use.

**Display Board** — Specifies the type of display board to use. This option is available only when the reroute type is set to 'Define Reroute.'

**Terminal Options** — Specifies whether to route to the default, local, or specific terminal.

**Terminal** — Specifies the terminal to which the display board connects. This option is available only when the terminal option is set to 'Specific Terminal.'

**Default Order Mode** — Specifies the default order mode to apply to orders placed from the specified terminal, when the terminal uses the display board.

**Route Current Order Only** — Routes only the order currently in use, if desired. When the order is complete, the routing returns to the pre-defined terminal. For example, terminal 1 has permanent control, and terminal 2 invokes temporary control. When terminal 2 completes the order, terminal 1 regains control. If terminal 1 had an order on it, that order appears immediately on the display board.

#### **To add a Reroute Display Board button:**

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Reroute Display Board** from the 'Action' property drop-down list. Additional options appear.
4. Select the **type of reroute** to assign the button from the 'Reroute Display Board Type' property drop-down list.

**Prompt Reroute** — Requires the system to display the POS Display Board Routing screen so you can reroute display boards.

**Define Reroute** — Allows you to preset a display board routing destination.

5. Select the **display board** to reroute from the 'Display Board' property drop-down list. This excludes PCD 101s.
6. Select the **display terminal** for the reroute from the 'Terminal' property drop-down list.
7. If desired, select **True** from the 'Route Current Order Only' property drop-down list, to route only the order currently in use. When the order is complete, the routing returns to the pre-defined terminal. For example, if terminal 1 has permanent control, and terminal 2

invokes temporary control, when terminal 2 completes the order, terminal 1 will regain control. If terminal 1 had an order on it, that order immediately appears on the board.

**Run Application** — Enables the use of another application located on the file server. Common applications are Calculator, Microsoft Word®, and Microsoft Excel®. Additional options appear when you select the Run Application button function.

**Application** — Specifies the path and file name of the application to run.

**Pass Parameters** — Indicates to add any parameters that are defined in the command line of the application. The default is 'False.'

**Continue Script Immediately** — Indicates to bypass any error messages the Run Application function might encounter. Use this option if the system takes too long to locate the external application and holds up the POS operation. The default is 'False.'

**To add a Run Application button:**

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Run Application** from the 'Action' property drop-down list. Additional options appear.
4. Click the **left column** of the 'ApplicationName' property and in the right column, type the **application name and path** for the application you want to run.
5. If desired, select **True** from the 'Pass Parameters' property drop-down list, to pass any parameters that might be defined in the command line of the application.
6. If desired, select **True** from the 'ContinueScriptImmediately' property drop-down list, to bypass any error messages the Run Application function might encounter. Use this setting if the system takes too long to locate the external application and holds up POS operations.

**Sales Summary** — Displays the FOH Sales Summary report.

**Script** — Enables you to combine multiple button functions in one button selection. An additional option appears when you select the Script button function. If you are an existing Aloha customer, and you previously had multiple sets of scripts within a script, the system displays each button function in sequence, as one single script.

**Script Actions** — Specifies the button actions to combine for the current script button. You must click the ellipses button (...) to select button actions on the Edit Script Action dialog box.

When you create a Script button, first determine the order in which you want functions to operate, then add each function to the Script dialog box, in that order. When you touch a script button on the POS terminal, the functions execute in sequence. For example, a payment, or tender button is typically set up as a Script button because when you apply payment to an order,

you usually want several functions to happen in sequence, such as apply tender payment, close the check, and return you to a specific panel or group of panels, so you can start a new order. In this situation, you add a Tender, Close Check, and Chain function to the script, in that order.

**Tip**

To require manager approval before a specific button function can execute, use the Just In Time (JIT) Manager Approval button function in the script. Assign the JIT button directly preceding the button function for which you require manager approval. When you select the JIT Manager Approval button function, you need to also select at least one access level that has the authority to perform the button function without the need for Manager Approval.

**To add a Script button:**

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Script** from the 'Action' property drop-down list. An additional option appears.
4. Click the **left column** of the 'ScriptActions' property, then click the **ellipses button (...)**. The Edit Script Actions dialog box appears.

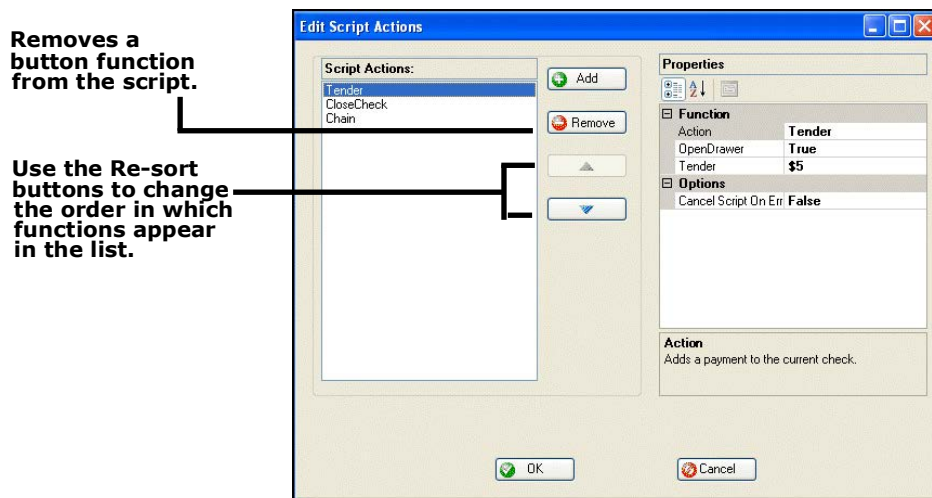


Figure 49 Edit Script Actions Dialog Box with Example Script Actions

5. Click **Add**. The Function and Options categories appear under the Properties column.
6. Select the first **button function** to assign to the script, from the 'Action' property drop-down list. Additional properties might appear.
7. Complete any additional **properties** that appear when you select a button function from the 'Action' property drop-down list.

8. If desired, select **False** from the 'Cancel Script On Error' property drop-down list, to enable the script to continue if the selected function fails or asks for a confirmation.
9. Repeat **steps 5 through 8** for each additional button function you add to the script.



#### Tip

In some cases, you might need to change the order in which each function operates. The Re-sort feature enables you to change the order in which the functions appear in the Script Actions list. Click the applicable Re-sort button, to move a function up and down in the list.

10. Click **OK** when finished. The Script Action property displays the button function names added to the script.

**Smart Item** — Defines an order item based on the Smart Select group and element, thereby, reducing the number of buttons on a panel. This accommodates items sold at various sizes, measurements, and prices, such as small, medium, and large.

**Default Item** — Indicates the item to order by default, when a Smart Select button is not chosen first on the POS terminal. For example, if you select a medium size coke as the default, when an employee touches the Diet Coke button on the POS terminal without first touching a Smart Select button, a medium Diet Coke is ordered by default.

**Items** — Specifies the item to associate with the Smart Group and Smart Element. Select the smart group, as defined in the associated Smart Select button function. Select the smart element to indicate a specific size, as defined in the corresponding Smart Select button function. For example, Kid size might correspond to Smart Element 1. Select the smart item to associate with the Smart Group and Smart Element. An item for each variation must be created previously in Maintenance > Menu > Items, for the items to appear in the in the Item drop-down list. (For example, Kid Coke, Small Coke, Medium Coke, Large Coke.



**Smart Select** — Designates the ‘Smart Group’ and ‘Smart Element’ associated with a Smart Item. Additional options appear when you select the Smart Select button function.

Smart Group — Designates a specific grouping of sizes. For example, beverage sizes might be assigned to smart group 1 and french fry sizes might be assigned to smart group 2. Small menus usually have very few smart groups.

Smart Element — Indicates a specific size within the smart group. For example, for a beverage smart group that consists of sizes: kid, small, medium, and large, you might assign element 1 to the kid size, element 2 to the small size, element 3 to the medium size, and element 4 to the large size.



**Note**

A smart element can refer to sizes, fluid levels, and more. Additionally, each time you order a smart item on the POS terminal, the smart element is cleared to zero when another button is touched.

The Smart Select and Smart Item button functions work together to create a panel containing items which are sold by size, without having to add each item to the panel, which enables you to create smaller, less confusing panels. For example, let’s say your Items database contains the following soft drink items:

● Small Coke	● Small Dr. Pepper
● Medium Coke	● Medium Dr. Pepper
● Large Coke	● Large Dr. Pepper
● Kids Coke	● Kids Dr. Pepper
● Small Diet Coke	● Small Sprite
● Medium Diet Coke	● Medium Sprite
● Large Diet Coke	● Large Sprite
● Kids Diet Coke	● Kids Sprite

Without Smart Select and Smart Item, 16 buttons are required on the Beverages panel to accommodate these soft drinks. With Smart Select and Smart Item, only eight buttons are required.



Figure 50 Sample Smart Item and Smart Select Buttons

For each new beverage, only one more button is required, therefore, the larger the variety of soft drinks that you offer, the more beneficial this feature becomes. The Smart Select button function defines the assorted sizes in the group. The Smart Item button function specifies the items associated with each beverage button, and designates the default size to order if the Smart Select button is not selected first. When a cashier orders a beverage on a POS terminal, they touch the size button, then touch the desired drink. If the cashier does not touch a size button first, the size you establish as the default is ordered.



**Note**

Place Smart Selects and Smart Items with the same Smart Group number on the same panel.

A Smart Select button designates the 'Smart Group' and 'Smart Element' associated with a smart item, and a Smart Item button defines an order item based on the Smart Select group and element, thereby, reducing the number of buttons on a panel. This accommodates items sold at various sizes, measurements, and prices, such as small, medium, and large.

The following setup depicts the requirements to configure Smart Select buttons for the Beverage Sizes Smart Group.

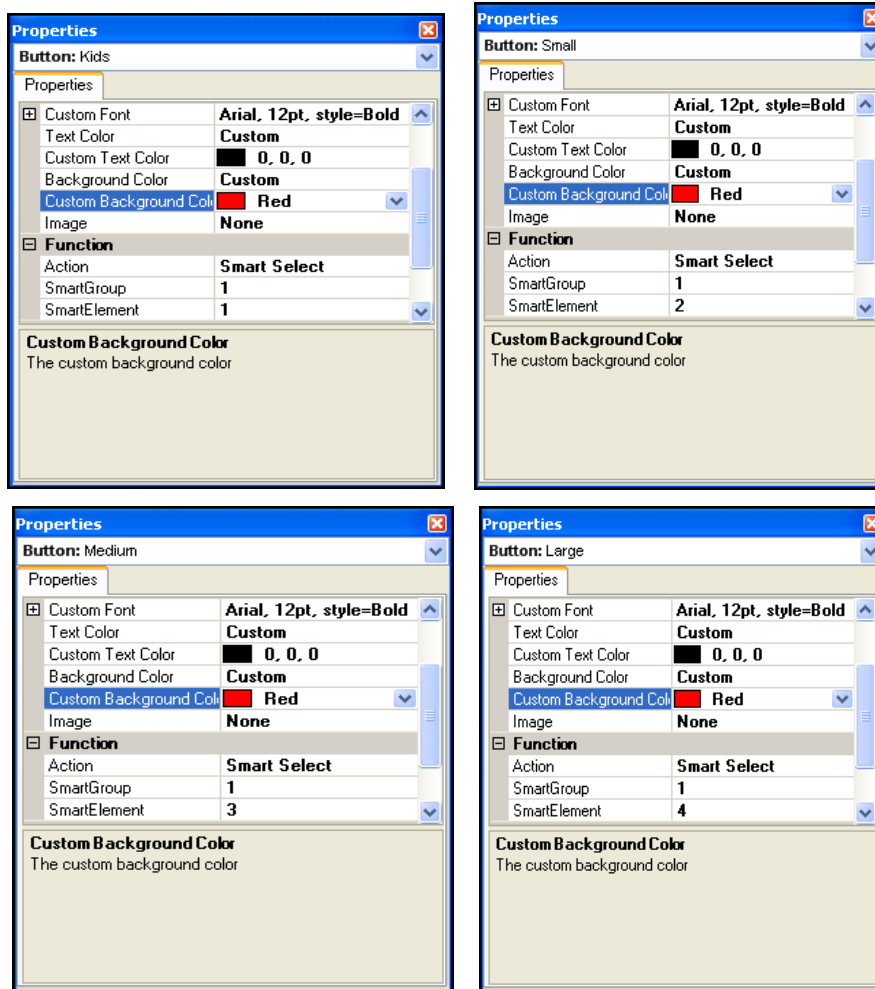


Figure 51 Smart Select Configuration

The following setup depicts the requirements to configure Smart Items for a Diet Coke button, based on the Smart Select button:

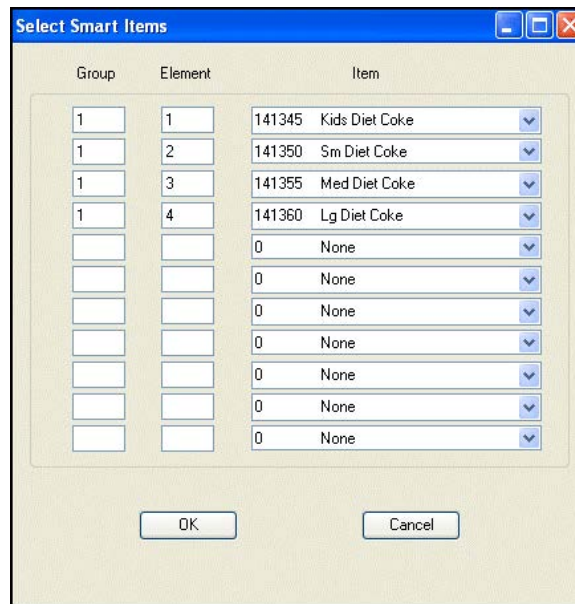


Figure 52 Smart Item Configuration

### Caution

The Smart Select and Smart Item button functions are discussed in the order required for setup, not the order in which they appear in the list.

### To add a Smart Select button:

1. Add a **button**, or select an **existing button**.
2. Locate the **Function** group bar on the Properties window.
3. Select **Smart Select** from the 'Action' property drop-down list. Additional options appear.
4. Click the **left column** of the 'SmartGroup' property and in the right column, type a **smart group number** to designate a specific grouping of sizes. For example, beverage sizes might be assigned to smart group 1 and french fry sizes might be assigned to smart group 2. Small menus usually have very few smart groups.
5. Click the **left column** of the 'SmartElement' property and in the right column, type the **smart element** to indicate a specific size within the smart group. For example, for a beverage smart group that consists of Kid, Small, Medium, and Large sizes, you might assign element 1 to the

Kid size, element 2 to the Small size, element 3 to the Medium size, and element 4 to the Large size.



#### Note

A smart element can refer to sizes, fluid levels, and more. Additionally, each time you order a smart item on the POS terminal, the smart element resets to zero when you touch another button.

**Special Functions** — Displays the FOH Special Functions screen.

**Special Message** — Displays the Special Message screen so you can enter a free text description. This button function is equivalent to the 'typewriter' button on the 'classic' modifier screen.

**Submenu** — Allows you to navigate to a specific submenu. If you have not fulfilled all modifier group requirements, such as minimum, the system prompts you to complete the requirements first before navigating to the submenu. An additional option appears when you select the Submenu button function.

Submenu — Specifies the submenu to which you want to navigate with the Submenu button function.

**Surcharge Functionality** — Enables you to remove an order mode service charge from a guest check. The Remove M Charge text appears on the button automatically and this button is active only when a service charge exists on the check. Once you remove the service charge, the button becomes unavailable and you cannot reapply the fee. This button function is available only for the 'Close Screen' panel type. **Required Options:** To allow an employee to remove the service charge from the guest check, access Maintenance > Labor > Pos Access Levels, select 'Adjust payments' under the 'Financial' group bar, and then assign the access level to the employee. **Documented Version:** v14.1.

**Table** — Tables play an intricate part of the Floor Plan screen. If the number of seats and type of table was not specified when tables were initially defined in Maintenance > System Settings > TableDefinition, these properties must be defined to interact with the Floor Plan Interface. When you add a new Floor Plan panel, or open an existing Floor Plan panel, you can add tables to the panel that represent the tables in your restaurant. You use tables in Floor Plan to be able to quickly open a new check for each corresponding, physical table in your layout. You must have tables set up in Maintenance > System Settings > Table Definition, before you can add tables to a Floor Plan panel. **Required Option:** You must set the 'Show seats on panel' option, which is a Floor Plan panel property, to 'True,' or seats will not display around tables on your panel.

#### To add a Table:

1. Click inside the selected Floor Plan **panel**.
2. Locate the **Floor Plan** group bar in the Properties window.

3. If you want seats to appear on tables, select **True** from the 'Show seats on table' drop-down list.
4. Select **Panel > New Table** from the Panel Editor menu bar.
5. **-or-**
6. Right-click the **panel** and select **New Table**.
7. The table appears in the panel.
8. Drag the **table** to the desired location in the panel.
9. With the table selected, locate the **Table Settings** group bar in the Properties window.
10. Select an existing **table** from the 'Table Number' drop-down list.
11. **Note:** Once you select an existing table, you cannot use that same table anywhere else on the panel.
12. Enter a **number** next to 'Orientation' to change the angle of the table.
13. If you use 'pivot seating' at your restaurant, enter a **starting position number** between 1 and 8. The diagram below displays pivot seating positions.

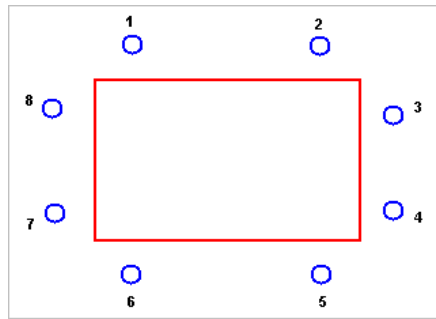


Figure 53 Pivot Seating Positions

- The pivot seating position appears in light blue on the table.
14. Select the **seat type** for each seat, from the 'Seating Style' drop-down list.
  15. Select **Panel > Save Panel** from the Panel Editor menu bar.



### Reference

Refer to the Table Definitions function description for more information on defining tables.

**Tax Exempt** — Opens the FOH Tax Exempt screen, into which you can enter a tax exempt number and remove exclusive taxes from the guest check. For Table Service, this button function is available only for the 'Close Screen' panel type and provides the same functionality as the button by the same name on the hard-coded Close screen that appears in Table Service. **Related Options:** You must select 'Apply tax exempt' under the 'Financial' group bar in Maintenance > Labor > Pos Access Lev-

els and assign that access level to the job code for which the customized Close screen appears, to provide an employee assigned to the job code the ability to apply the tax exemption without manager approval. **Documented Version:** v14.1.

**Tender** — Applies a specified payment to the current guest check.

Tender — Indicates the specific payment type to apply to the check. Tender types, which are used to apply payment to a guest check, must be defined previously in Maintenance > Payments > Tenders, to appear in the drop-down list.

Open Drawer — Opens the cash drawer automatically when the cashier selects that tender type.



### Tip

The cash drawer setting on the Maintenance > Store Settings > Security > Cash Drawer tab overrides all tender buttons with Open Drawer set to 'True.'

**Transfer Tables** — Enables an employee to transfer a table to themselves or to another employee.

**View Schedule** — Enables a FOH employee to view prepared labor schedules from the FOH, on demand. **Related Options:** To enable the system to automatically print employee schedules on the clock-out chit, select 'Print schedule on clock-out chit' in Maintenance > Business > Store > Store Settings tab > Labor group > 'Clock In/Out' group bar. **Documented Version:** v6.7.

**View Tables Mode** — Enables separate viewing options for tables. A button must be created for each mode. Tables play an intricate part of the Floor Plan screen. If the number of seats and type of table was not specified when tables were initially defined in Maintenance > System Settings > Table Definition, these properties must be defined to interact with the Floor Plan Interface.



### Reference

Refer to the Table Definitions function description for more information on defining tables.

View Tables Mode — Indicates how view mode will function. Select from one of the following:

- Select 'Standard View' to display tables with no text.
- Select 'Time Opened View' to display the number of hours and minutes the table has been open.
- Select 'Owner View' to display the name of the employee who started the table and is responsible for the sales.
- Select 'Time Since Last Item Ordered View' to display the time the last item was ordered.
- Select 'Check Number View' to display the check number for the table.
- Select 'Time Since Last Check Printed View' (v6.5) to display the time elapsed since the check was last printed for each table for which you make modifications to the check. **Related**

**Options:** To display an icon in the image of a check mark for a table, select 'Display Printed Check Icon' on the Table button function in Panel Editor.

**Working with Tables Screen** — Displays the Working with Tables screen.



## Appendix C: Widget function descriptions

Appendix C provides a description for each type of widget you can add to a Dashboard panel. The widget types are listed in alphabetical order:



### Tip

An asterisk (\*) denotes functions we recommend for managers of higher level employees to access. Most functions are controlled by the access level of the employee, as well as the job code. Refer to Labor Functions, for more information on Access Levels and Job Codes.



### Reference

Refer to the [Dashboard Feature Focus Guide - HKS323](#) for more information on configuring and using this feature.

### To add the desired widgets to a dashboard panel:

1. Click inside the **dashboard panel**.
2. Select **Panel > New Widget**. A widget of the 'Guest check count' type appears on the panel as the default selection. The Properties dialog box also reflects settings for the 'Guest check count' widget.
3. To choose a widget of a different type, make a selection from the **Type** drop-down list. You can resize, move, and configure any dashboard widget to suit your needs.
4. Refer to the **appropriate procedure** for specific instructions on configuring each type of widget.

### List of widgets

**Current Day Part** — Displays the name of the active day part, as configured in Maintenance > System Settings > Day Part. **Documented Version:** v14.1.

Display format — Enables the name of the active day part to display in text. 'Text only' is the only option that appears for the 'Current day part' widget in 'Display format.'

**Date** — Displays the current date of business on the dashboard. Additional options appear when you select the Date widget function. **Documented Version:** v14.1.

Display format — Enables the current date of business to display in text. 'Text only' is the only option that appears for the 'Date' widget in 'Display format.'

Date format — Allows the current date of business to display in one of the three following formats: (1) MM/DD/YY; (2) Day, Month and Date, Year; or (3) Month and Date, Year.

**Guest Check Count** — Displays a running guest check count, which you can reset between each day part. Configure your minimum and maximum thresholds, including threshold colors, for easy identification of alerts. You can also configure this widget to alert you in ascending or descending order. Choose the method that best suits your requirements. Additional options appear when you select the Guest Check Count widget function. **Documented Version:** v14.1.

Display format — Enables the running guest check count to display as text, a graph, or a gauge.

Link to report — Displays a specific report to appear on the screen when you touch the widget. As of this publication, the system offers the (1) Break Alert Report, (2) Daily Summary Report, (3) Employee Breaks Report, (4) Flash Report, (5) Labor Report, (6) Product Mix Report, (7) Sales Report, or (8) Server Sales Report.

Labor group — Displays a labor group, such as Non-Salary.

Limit by day part — Enables you to limit the guest check count by day part. Select True to enable, or False to disable, this feature.

Starting day part — Enables the guest check count to begin by a specific day part.

Ending day part — Enables the guest check count to end by a specific day part.

Alert calculation — Determines if the alert for the guest check count widget occurs when the calculation is greater than or when it is less than each threshold.

Display minimum — Determines at which to begin incrementing and displaying the guest check count calculation in the widget.

Display maximum — Determines at which to stop incrementing and displaying the guest check count calculation in the widget.

Threshold 1 amount — Displays the guest check count when the first critical alert is met.

Threshold 1 color — Displays the color you select to indicate you have met the first critical threshold.

Threshold 2 amount — Displays the guest check count when the second critical alert is met.

Threshold 2 color — Displays the color you select to indicate you have met the second critical threshold.

**Sales** — Displays the current sales, which you can reset between day parts. Configure your minimum and maximum thresholds, including threshold colors, for easy identification of alerts. You can also configure this widget to alert you in ascending or descending order. **Documented Version:** v14.1.

Display format — Enables the sales widget to display as text, a graph, or a gauge.

Link to report — Displays a specific report to appear on the screen when you touch the widget. As of this publication, the system offers the (1) Break Alert Report, (2) Daily Summary Report, (3) Employee Breaks Report, (4) Flash Report, (5) Labor Report, (6) Product Mix Report, (7) Sales Report, or (8) Server Sales Report.

Limit by day part — Enables you to limit the guest check count by day part. Select True to enable, or False to disable, this feature.

Starting day part — Enables the sales widget to begin by a specific day part.

Ending day part — Enables the sales widget to end by a specific day part.

Alert calculation — Determines if the alert for the sales widget occurs when the calculation is greater than or when it is less than each threshold.

Display minimum — Determines at which to begin incrementing and displaying the sales calculation in the widget.

Display maximum — Determines at which to stop incrementing and displaying the sales calculation in the widget.

Normal threshold color — Displays the color you select to indicate you are in the acceptable threshold range.

Warning threshold amount — Displays the amount at which the defined warning threshold is met.

Warning threshold color — Displays the designated color to indicate you have met the defined warning threshold.

Critical threshold amount — Displays the amount at which the defined critical threshold is met.

Alarm threshold color — Displays the designated color to indicate you have reached the defined critical threshold.

**Time** — Displays the current time on the dashboard. **Documented Version:** v14.1.

Display format — Enables the time widget to display.

Time format — Allows the current time to display in one of the three following formats: (1) HH:MM, (2) HH:MM:SS, or (3) as a 24-hour clock.

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[Documentation.HSR@NCRVoyix.com](mailto:Documentation.HSR@NCRVoyix.com)