Feature Focus Guide:

Order Scheduling and Capacity Tracking

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

Contents

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Revision Record

Date	Version #	Description
Prior to 06/03/2021	v1.0+	Implemented Order Scheduling and Capacity Tracking.
	v17.1+	Added the ability to view capacity detail by order mode.
06/03/2021		Converted the document to use new templates.
01/06/2023		Updated the front cover and back page to reflect new NCR branding.
12/20/2023		Updated document to reflect NCR Voyix branding.

About Order Scheduling and Capacity Tracking

Order Scheduling and Capacity Tracking at a Glance	
Core Product	NCR Aloha Takeout
Complementary Products	NCR Aloha Table Service, NCR Aloha Quick Service
Separate License Required?	An 'Aloha Takeout and Delivery' license is required.
	Note: An 'Aloha Takeout and Delivery Mapping' license is not required for Delivery area functionality.
Other References	NCR Aloha Takeout Implementation Guide, NCR Aloha Takeout Reference Guide

Figure 1 Capacity Detail Screen

In the restaurant business, it is important to estimate and monitor how many orders and items your establishment can produce within a specific time of day with consideration to staffing and the length of time it takes to prepare an item. An overload of orders at one time can easily back up the kitchen and the dispatch of delivery drivers, resulting in delayed orders and unsatisfied customers.

In Aloha® Takeout (ATO), you can define the time segments that appear on the Front-of-House (FOH) Future and Dispatch screens according to your operational needs. In conjunction with Order Scheduling, Capacity Tracking enables you to limit the number of future orders or items the system

can accept during a defined time segment, reducing the number of customer complaints received as a result of over-committed drivers and kitchen resources. The system manages the available time segments across multiple terminals on a first-come first-serve basis.

In addition, you can use a Capacity Detail button to view an on-screen list of orders for a specific time frame compared to your configured order scheduling limits. When you reach the limit of your defined order capacity, the system prevents you from accepting the order for that time period; however, you can still accept the order for a different order mode or for a different time period. In the event you want to accept an order for the time period in which you have already reached your capacity limit, we recommend you provide an employee, such as a manager, the ability to override the order capacity limit.

SCENARIO: FUTURE ORDER: A restaurant determines the kitchen can prepare 25 sandwiches within a 30-minute period and any more would overtax the kitchen and cause orders to be delayed, During the period, a total of 50 sandwiches are ordered for as a future order and passed through Aloha Takeout. The system limits the number of sandwiches you can order to 25; however, if you feel you can handle more, you can override the capacity limitation on demand.

SCENARIO: DELIVERY DRIVER: A restaurant schedules two delivery drivers for the lunch shift. Each driver can make two deliveries per 15-minute period, resulting in a total of four deliveries for every 15 minutes. A fifth delivery order would overtax the drivers and could cause orders and delivery runs to be delayed. Setting a limit of four orders for the 15-minute period prevents the system from allowing more delivery orders; however, if you feel you can handle more orders, you can override the capacity limitation on demand.

Configuring Order Scheduling and Capacity Tracking

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

Procedures at a Glance:
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.

1.	Configure how you view orders in the ATO on the Future and Dispatch screens. Access **Maintenance > Takeout Configuration > Takeout Settings > Order Scheduling** tab to configure Order Scheduling. See page 7. • Set the **default display time segment value** and the **day of the week** on which your business week starts. • Create and define **business day parts** for each day of the week. Configure capacity tracking for your Weekly Schedule. Access **Maintenance > Takeout Configuration > Takeout Settings > Order Scheduling** tab to configure Capacity Tracking. See page 9. • Enable **Order capacity tracking**. • Set the **default capacity time segment length**. • Enable the **order mode types**, to track item and order capacity. • Set the **capacity thresholds** for each day, by business part.
2.	Select **Maintenance > Labor > POS Access Levels** to configure which access levels can override order capacity. See page 10.
3.	Access **Maintenance > Takeout Configuration> Takeout Settings > Panel Options** to add the 'Capacity Details' button to the ATO FOH screens you select. See page 11.
4.	Select **Utilities > Refresh POS & All Products** to refresh the data. See page 12.

Defining your start day, day parts, and tracking limits

You must define how you want to break down specific ordering scheduling day parts, or segments, to appear on the FOH Dispatch and Future screens. Order scheduling day parts are similar to POS day parts, in concept; however, you base order scheduling day parts on scheduled resources as opposed to sales tracking. They do not need to match.

Once you define your time segments, you configure the maximum number of items and orders you can produce within that time segment so the system knows when the restaurant is approaching maximum capacity.

To configure general settings for order scheduling:

1. With Takeout selected in the product panel, select **Maintenance > Takeout Configuration > Takeout Settings > Order Scheduling** tab.
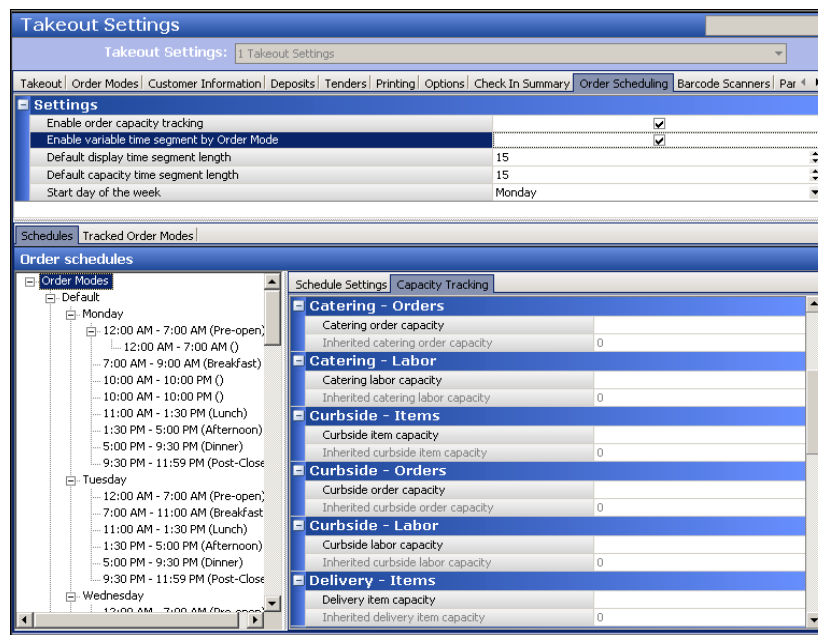

Figure 2 Takeout Settings - Order Scheduling Tab

2. Under the 'Settings' group bar, type the default **increment of time** to break down the day in 'Default display time segment length.' The system uses this value as the 'Inherited default display time segment length,' for each day part; however, you can set a different duration for a time segment on the Schedule Settings tab for the selected day part. If you select 15, then the time segments appear in 15 minute increments, such as 9:00 a.m., 9:15 a.m., and more.

3. Select the **first day** of your business week from the 'Start day of the week' drop-down list.

4. Continue to the **next procedure** to create your order scheduling day parts.

To create order scheduling day parts:

1. With the Order Scheduling tab still displayed, right click a day of the week in the 'Order schedules' window (Figure 2), and select Add New from the menu that appears to create an order scheduling day part.
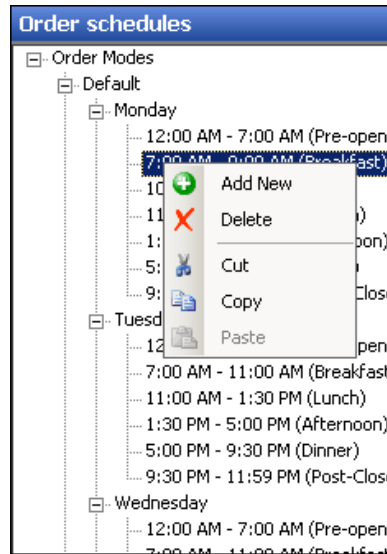

Figure 3 Ordering Scheduling Day Part Window

2. On the Schedule Settings tab and under the 'General' group bar, type a **name** for the order scheduling day part, such as 'Breakfast.' If you are using a granular approach, such as 15-minute increments, you can name the day part by the time of day.'

> **Note**
> 'The 'Show in week summary' option is no longer supported.

3. Set the **Begin time of day** and **End time of day** to reflect the beginning and ending times of a order scheduling day part. For example, for a day part named 'Lunch,' set the 'Begin time of day' to '11:00 a.m.' and the 'End time of day' to '01:30 p.m.'

4. Set a **Display time segment length**, if you want the time to be different than the default display time segment length.

   You can adjust the 'Display time segment length' during slower day parts, to consolidate the display time on the ATO FOH screens when you book fewer orders. Increasing the display time length in slower business day parts reduces the need to scroll down on ATO FOH screens and improves screen response. For example, during the afternoon business parts that are slower, set the 'Display time segment length' to a higher increment, such as '04:00,' to cover the four hours between '01:30 p.m.' and '05:30 p.m.'

5. Click **Save**.

6. Repeat this procedure for **each day** and its respective **day parts**.

7. Continue to the **next procedure** to configure Capacity Tracking.

To configure Capacity Tracking:

1. With the Order Scheduling tab displayed, and under the 'Settings' group bar ([Figure 2](#)), select **Enable order capacity tracking** to track the number of orders and items, per time segment, enforcing limitations you place on them. This option also displays the Tracked Order Modes and Schedules > Capacity Tracking tabs.

2. Select **Enable variable time segment by Order Mode** to allow you to choose a specific order mode for which to compare actual orders to configured order scheduling limits. Once you select the order mode to view, the order capacities appear on the Capacity Detal screen for each time segment, as usual.

3. Select the **Default capacity time segment length** to establish the increment of time you want to use for controlling the number of orders you can accept for a time frame. Aloha Takeout uses the capacity time segment to calculate whether or not you have reached the number of allowed orders and items for the time segment. In most cases, the 'Default capacity time segment length,' matches the 'Default display time segment length.' ***Recommended Configuration:*** Set this number to the length of an average delivery order round trip in your area, or to the defined number of minutes you use to determine kitchen productivity capacity. This is usually 15 or 20 minutes.

4. Select thesubtab.

5. if your kitchen or cashier staff can only fulfill a certain number of orders.Select the **Schedules** tab, then the **Capacity Tracking** tab.

6. Select a **day part** for which you want to implement capacity tracking under 'Order Schedules.'

7. Set the **Capacity time segment length**, if you want the length to be different than the inherited time segment capacity length.

> 📝 **Note**
>
> For periods when the restaurant is closed, enter a time span equal to the number of hours your restaurant is closed. For example, set the pre-open capacity time segment length to 11:00 (11 hours) to account for the time from midnight to 11:00 am when the store is not fulfilling ATO orders.

8. Select the **Capacity tracking** subtab.

9. Enter the **item** and **order capacity** for each order mode, if different from the inherited capacities.

10. Repeat this procedure for **each day part**

In the figure above, the 'Call-in item capacity' and 'Delivery item capacity' are both set to 90. This is based on an average employee able to produce 30 items within the defined 15 minute 'Capacity time segment length.' You schedule three employees during Friday lunch to address ATO order production. 30 items x 3 employees = 90 item capacity for the Friday lunch day part. Delivery order capacity is set to eight. This is based on the average driver delivering two orders within the defined 15 minute 'Capacity time segment length' and you schedule four drivers during Friday lunch. 2 orders x 4 drivers = 8 delivery order capacity for the Friday lunch day part.

11. Click **Save**.

Providing the ability to override capacity limits

We highly recommend you configure an employee, such as a manager, with access to override order capacity limitations. You would not do this for the interface employee logging into Aloha Takeout.

1. With Takeout selected in the product panel, select **Maintenance > Labor > POS Access Levels**.

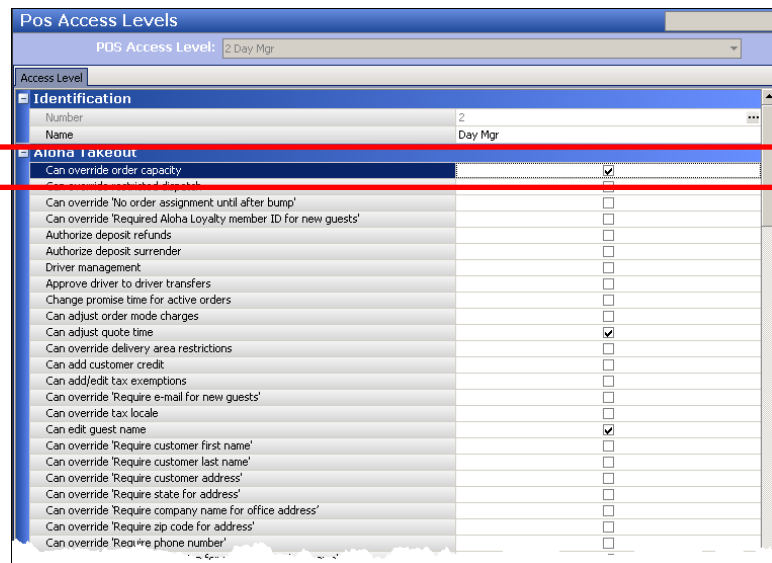2. Select an **access level** from the 'POS Access Level' drop-down list.

Figure 4 POS Access Levels

3. Under the 'Aloha Takeout' group bar, select **Can override order capacity**.

4. Click **Save**.

5. Repeat for **each access level** for which you want to override order capacity.

6. Exit the **POS Access Levels** function.

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Adding the capacity detail button on ATO FOH screens

You must add the Capacity Detail button to specific ATO screens to allow you to view your current order capacity, on demand.

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Panel Options** tab.

2. Select a **tab** representing one of the ATO FOH screens.

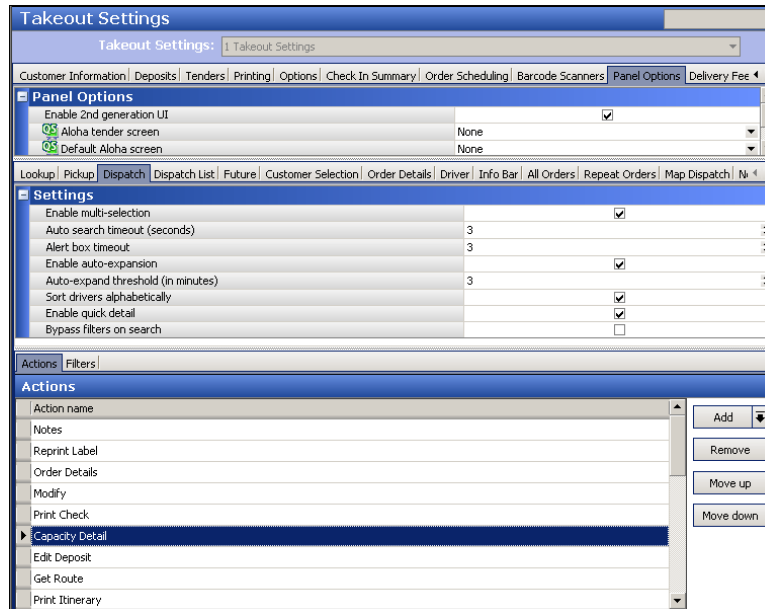3. Select the **Actions** tab, if needed.

Figure 5 Takeout Settings - Panel Options Tab

4. Under the 'Actions' group bar, click the **Add** drop-down arrow, select **Capacity Detail**, and click **OK**.

5. Click **Save**.

6. Repeat this **procedure** for any other screen for which you want the Capacity Detail button to appear.

7. Exit the **Takeout Settings** function.

Refreshing the data

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

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

Using Order Scheduling and Capacity Tracking

Capacity Tracking allows you to limit the number of future orders or items accepted for a time segment; however, in some scenarios, once you reach the order limit for a time segment, you may want to override the restriction to accommodate an order for a favorite customer or some other scenario. You can easily override the order scheduling limit to schedule an order for a customer in a time segment for which you have already reached the set limit. Additionally, at the ATO FOH you can quickly view your current capacity detail against the order scheduling limits.
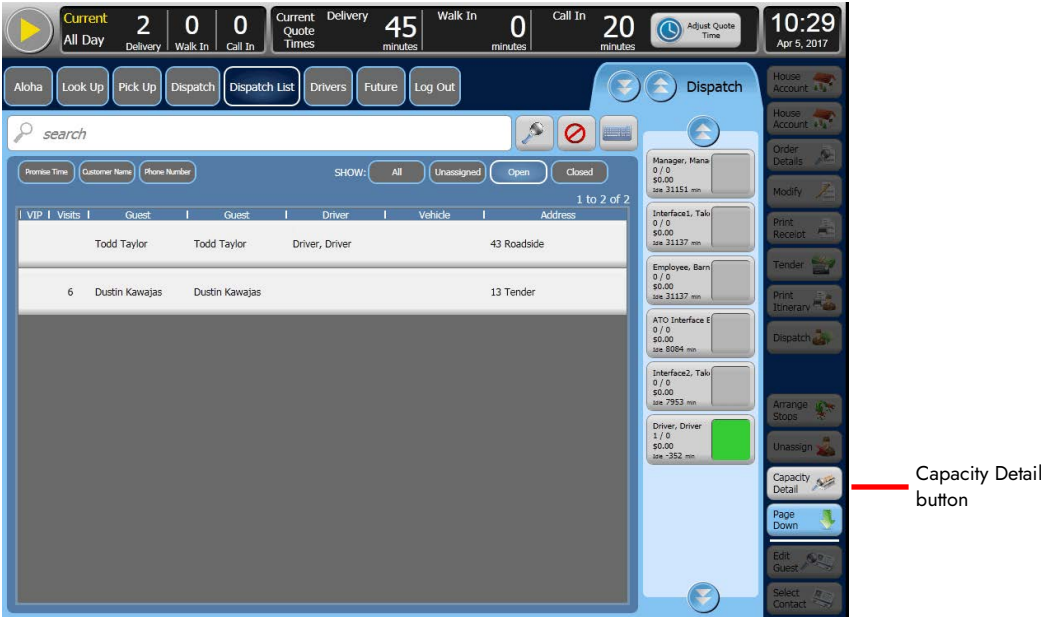

Figure 6 FOH Dispatch Screen

Reaching order capacity restrictions

If you attempt to place an order after you reach your order capacity, the 'Order Capacity Exceeded' screen appears, providing you with three options: 'Delay Order,' 'Override,' and 'Cancel.'
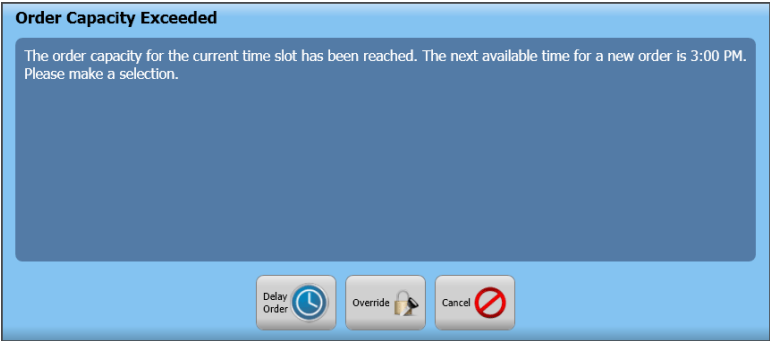

Figure 7

To delay the order to be prepared at another time or date:

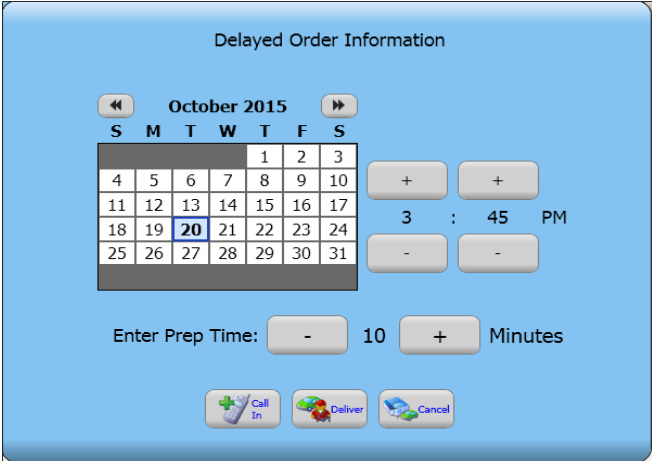1. Touch **Delay Order**. The Delayed Order Information screen appears.

Figure 8 Delayed Order Information Screen

2. Select a **calendar date** and **time** for the order.
3. Touch a **date** on the calendar to select the requested date, if different from the current date.
4. Touch **plus** and **minus** (+ and -) to adjust the promise and preparation times.
5. Touch an **order mode**.

To override the order capacity restriction:

1. Touch **Override**. If your access level allows you to override order capacity restrictions, continue placing the order for the specified time slot. If you do not have the proper access to override an order capacity restriction, a manager approval screen appears.
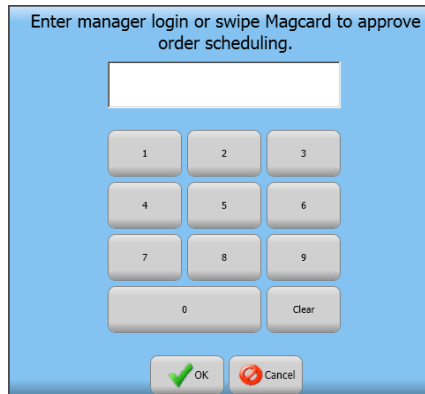

Figure 9 Manager Override Order Scheduling

2. A manager or an employee with sufficient access must enter their login credentials to allow the order capacity override for you to continue the order.

Viewing Capacity Detail screen

Use the Capacity Detail action button to provide a quick on-screen comparison of your actual orders to your configured order scheduling limits for the current time segment and the segment you are approaching.
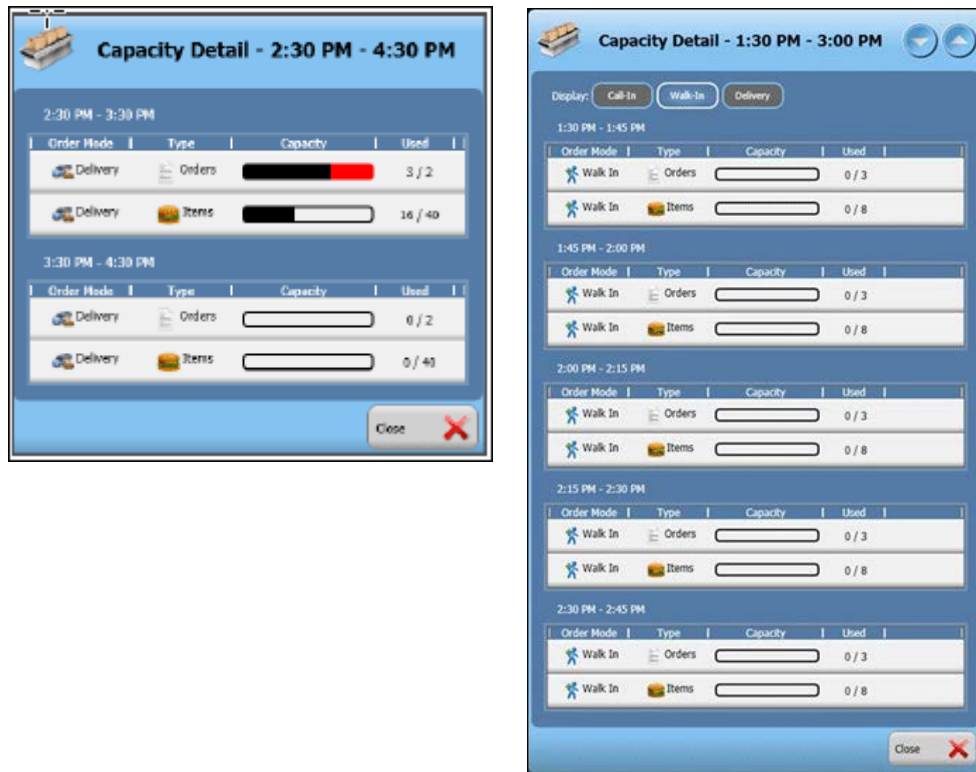

Figure 10 Capacity Detail Screen by Time Segments (Left) and by Order Modes (Right)

1. Touch a **tab** on the ATO FOH navigation bar to access one of the order management screens.
2. Touch **Capacity Detail** on the right side of the screen.
3. If configured, select an **order mode** at the top of the screen.
4. View and evaluate the **content** on the Capacity Detail screen.
5. When complete, touch **Close** to exit the Capacity Detail screen.

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