NCR VOYIX

Aloha Takeout Utilities
User Guide

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Date	Version #	Description
04/03/2023		Converted the document to use new templates.
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Contents

About Aloha Takeout Utilities

Aloha Takeout Utilities at a Glance	
Core Product	Aloha Quick Service or Aloha Table Service
Complementary Products	Aloha Takeout
Separate License Required?	Aloha Takeout requires a separate license. The Delivery component of Aloha Takeout requires a separate license from Aloha Delivery/Frequent Buyer (D/FB), which is included as part of the Aloha Takeout license. It is not necessary to actually install D/FB. The mapping component of Aloha Takeout requires a separate license, if you elected to install it.
Other References	Aloha Takeout Reference Guide, Aloha Takeout Implementation Guide

Aloha® Takeout (ATO) has several utilities that provide value for you and are available as part of the installation. The system installs these utilities in the Aloha Takeout\Bin directory. This guide details how to access and use each utility.

> **Note**
> Some of these utilities are not intended for daily use and may require assistance from an NCR Voyix support representative.

- **Takeout Customer Organizer** (TakeoutCustomerOrganizer.exe) helps you manage your customer database by "cleaning up" unwanted and duplicate records, which reduces the size of your database for maximum efficiency. An organized database improves the ability of the order taker to quickly locate and start an order for a customer. See "Using Takeout Customer Organizer" on page 3.

- **Aloha Takeout Console** (TakeoutConsole.exe) enables you to manually perform adjustments on Aloha Takeout orders from the Back-of-House, such as removing orders that do not respond to other close commands and reactivating orders that you cancel in error. You can also export a file of all future orders for use when integrating to a new product, such as NCR Voyix Back Office. See "Using Aloha Takeout Console" on page 6.

- **Data Importer** (DataImporter.exe) enables you to import customer data from an Aloha Delivery/Frequent Buyer (D/FB) export, or other generic source, using a variety of different formats. This section also includes instructions for exporting a D/FB database in preparation for import into Aloha Takeout. See "Using Takeout Data Importer" on page 9.

- **Takeout Data Protection** (TakeoutDataProtectionTool.exe) manages the encryption keys for the Aloha Takeout product to protect stored credit card information in accordance with the Payment

Card Industry Data Security Standard (PCI DSS) specifications. See [“Using Takeout data protection” on page 14](#).

- **Takeout Database Tool** (TakeOutDatabaseTool.exe) helps you perform functions on the Aloha Takeout database, such as providing assistance when a SQL database becomes detached, deleted, or requires upgrading as part of a restore effort. Use this tool only during installation before a store goes live, or at the explicit instructions of an NCR Voyix support representative. See [“Using Takeout Database Tool” on page 18](#).

Using Takeout Customer Organizer

Takeout Customer Organizer enables you to purge inactive customers as well as incomplete or duplicate records. You can also merge multiple records into a 'primary' record in the event a duplicate record is created by mistake. When merging records, the utility combines the number of visits and order information into the primary record you select.

To launch Takeout Customer Organizer:

1. Navigate to the **Aloha Takeout\Bin** directory.
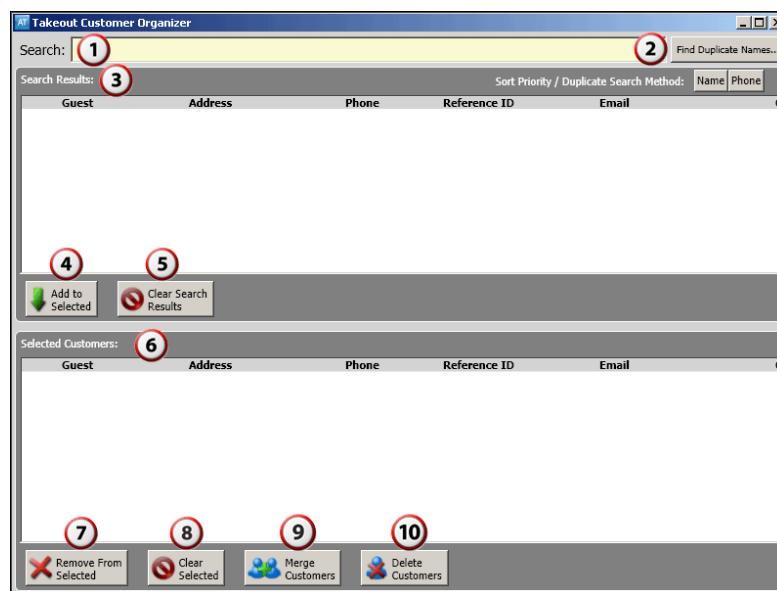2. Find and double-click **TakeoutCustomerOrganizer.exe**.

Figure 1 Takeout Customer Organizer Utility

Number	Field	Description
1	Search	Allows you to search for a customer name in the database.
2	Find Duplicate Names	Searches for possible duplicate profiles in the database.
3	Search Results	Displays a list of results from a search you initiate using the Search Text box or the Find Duplicate Names button.
4	Add To Selected	Moves the profiles you select in the Search Results panel to the Selected Customers panel.
5	Clear Search Results	Clears all profiles from the Search Results panel.

Number	Field	Description
6	Selected Customers	Displays the profiles that appeared in the Search Results panel, after you touch Add to Selected.
7	Remove From Selected	Removes the profiles you selected from the Selected Customers panel.
8	Clear Selected	Clears all profiles from the Selected Customers panel.
9	Merge Customers	Merges two or more profiles you selected into a single profile.
10	Delete Customers	Deletes the profiles you selected in the Selected Customers panel from the Aloha Takeout database.

To delete duplicate records:

1. Type the first **characters** in the 'Search' text box (the system displays possibles matches as you type) or click **Find Duplicate Names**. Any duplicate names appears in the window.
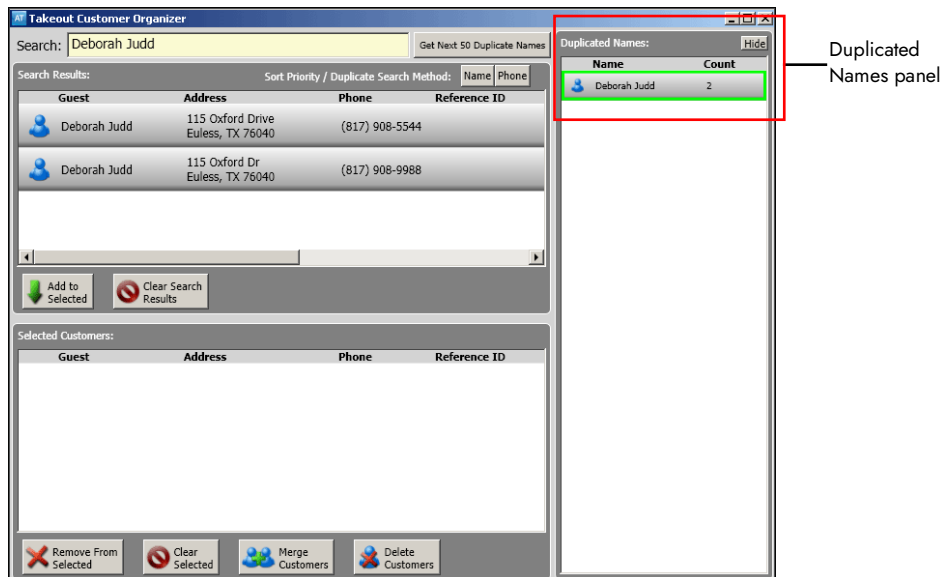

Figure 2 Takeout Database Utility - Search Results

2. If required, double-click a **customer profile** in the 'Duplicated Names' window to move it to the 'Search Results' window.

3. Select a **customer profile** and click **Add to Selected** to add the profile to the 'Selected Customers' window.

4. Select the **customer profile** in the 'Selected Customers' window and click **Delete Customers** to remove the customer profile from the Aloha Takeout database. A confirmation message appears.

5. Click **Yes** to remove the selected customer profile from the database.

> **Note**
>
> The system finalizes all removals at the ATO End of Day (EOD) to account for offline situations; however, once you delete a profile, you cannot undo the action. To restore a deleted profile, you must restore the entire Aloha Takeout database from a previous backup.

To merge duplicate customer profiles:

1. Click **Find Potential Duplicates**. A list of duplicate profiles appears in the window to the right.

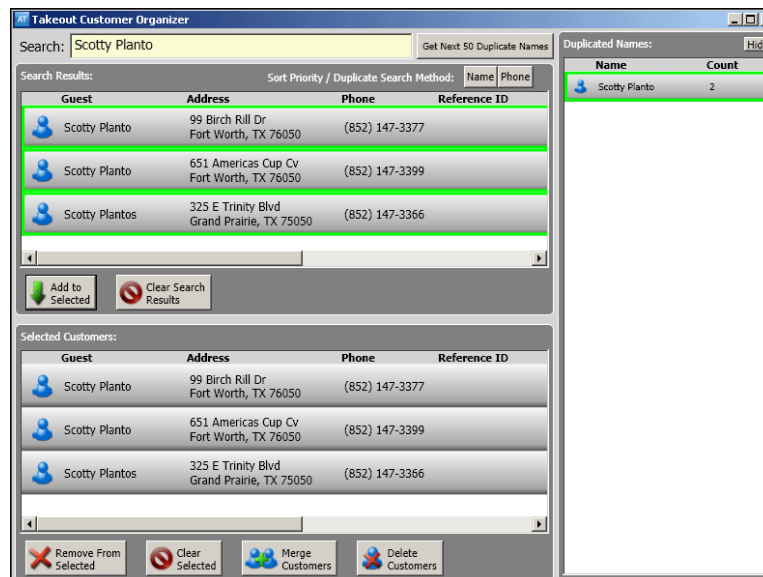2. Double-click a **customer profile** to move it to the 'Search Results' window.

Figure 3 Takeout Customer Organizer - Add to Selected

3. Select the **customer profile** in the 'Search Results' window and click **Add to Selected**.

4. Click **Merge Customers**. The selected records appear in an additional window.

5. Select the **profile** to serve as the primary profile and click **OK**. A confirmation message appears.

6. Click **Yes** to confirm the merge of customer profiles.

7. Click **Clear Selected** to clear the 'Selected Customers' window and begin a new search, if needed.

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Using Aloha Takeout Console

Aloha Takeout Console allows you to manually adjust orders from the Back-of-House. Using this tool, you can remove orders that are not responding to other close commands, manually release future orders, cancel future orders, and reactivate future orders released or canceled in error. You can also manually create and export a .csv file of your future orders. You can also clear all orders, order metrics, and reset drivers with the Force EOD button.

1. Navigate to the **Aloha Takeout\Bin** directory.
2. Locate and double-click **TakeoutConsole.exe**. The Aloha Takeout Console screen appears.

Closing an order

Use the Orders tab in the Aloha Takeout Console to remove orders that are not responding to other close commands.
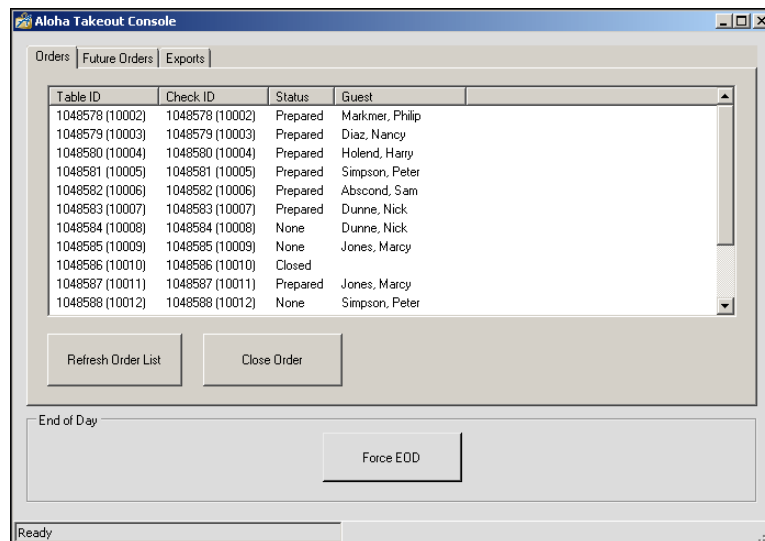

Figure 4 Takeout Console Orders Tab

1. With the 'Orders' tab active, click **Refresh Order List**. A list of all orders appear.
2. Locate and select the **order** you want to close.
3. Click **Close Order**.

Working with future orders

Use the Future Orders tab in the Aloha Takeout Console to release, cancel, or reactivate a future order.
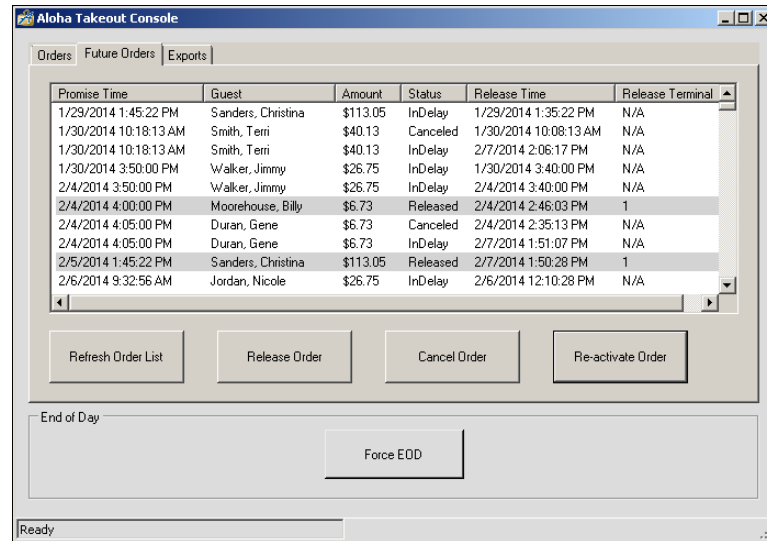

Figure 5 Takeout Console Future Orders Tab

1. With the 'Future Orders' tab active, click **Refresh Order List**. A list of all future orders appears.

2. Locate and select a **future order**.

3. Select **Release Order** to release a future order.

   -OR-

   Cancel Order to cancel a future order.

   -OR-

   Re-activate Order to re-activate a canceled future order.

   A confirmation screen appears.

4. Click **Yes**.

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Creating a future orders export file

Within the Aloha Takeout Console, you can also create a .csv export file containing your future orders. Choose from one of two options, Incremental or Full. The End of Day process automatically creates an export file of your future orders. The Incremental export creates a file with any new or modified future orders since the last export, created either by the End of Day process or a previous Incremental export. The Incremental export includes any new or modified future orders since your last End of Day export or your last Incremental export, whichever was more recent. The Full export creates a file with all active future orders in the system. Use the Full export when adding NCR Voyix Back Office to your system or for any reason that requires a full export file of future orders. The system stores the export file in %\Bootdrv\Aloha\ftp\AdvanceOrders.
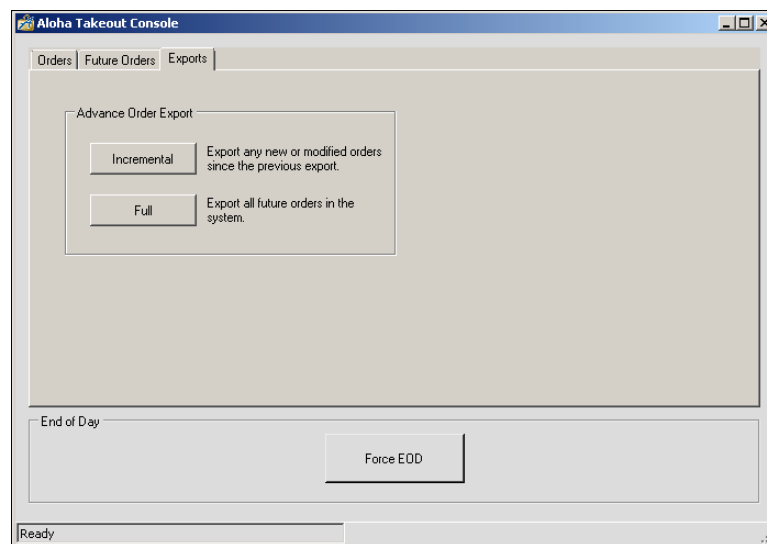

Figure 6 Takeout Console Exports Tab

1. With the 'Exports' tab displayed, click **Incremental** to export any new or modified orders since the previous export, or **Full** to export all future orders in the system. A successful export confirmation screen appears.

2. Click **OK**.

Using Takeout Data Importer

Data Importer enables you to import customer data from a variety of file formats, including an export file created from the Aloha Delivery/Frequent buyer customer database.

Exporting customer data from Aloha Delivery/Frequent Buyer

If you have been using Aloha Delivery/Frequent Buyer in your site, you can use Microsoft® Access to create an export of your customer data for import into your Aloha Takeout database. This import provides welcome continuity for you and your customers between the two systems.

1. Navigate to the Aloha\BackOffice\DS directory and double-click **DSData.mdb**. The Delivery/Frequent Buyer database opens in Microsoft® Access.
2. Click **Tables** to display the tables in the database file.
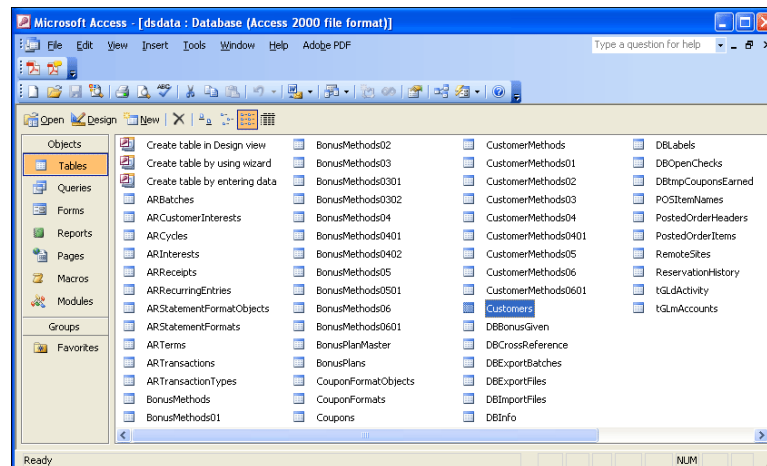3. Select the **Customers** table.

Figure 7 DSData.mdb in MS Access, Customer Table Selected

4. Select **File > Export**.
5. In 'Save in,' browse to the **staging directory** where you want to store the new .csv file.
6. Type a **file name** in the text box.

7. Select '**Text files (*.txt, *.csv, *.tab, *.asc)**' from the 'Save as type' drop-down list.
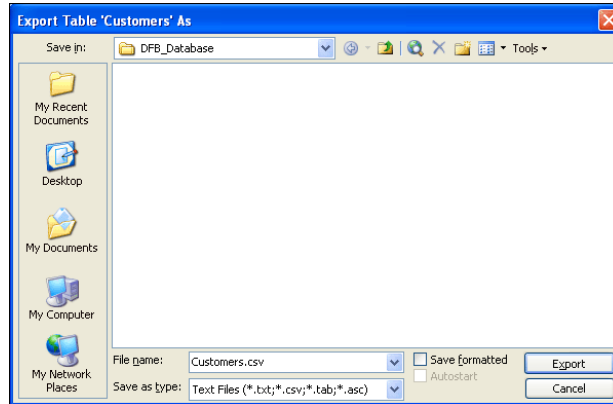

Figure 8 Creating the Comma-Delimited Database File

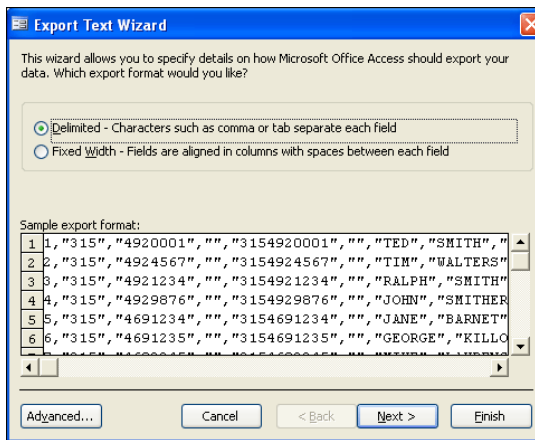8. Click **Export**. The Export Text Wizard screen appears.

Figure 9 Configuring the Export

9. Select '**Delimited**,' and click **Next**. The utility prompts you to choose a delimiter.
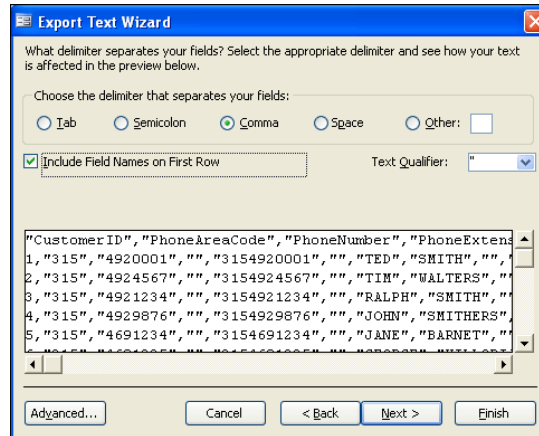

Figure 10 Configuring the Export

10. Select **Comma** as the delimiter.

11. Select **Include Field Names on First Row** and click **Next**.

12. Click **Finish**. The utility completes the file export.

Importing customer data with Data Importer

Use the Data Importer to import customer data. Select the type of import from the Import Format list box. The most common types are "DeliveryFB" and "Generic Customer."

DeliveryFB — Imports the Customers.csv exported customer table created from the Delivery Frequent Buyer customer data tables.

GenericCustomer — Imports customer information from most other sources. If you are able to export customer information into a .csv or .xls format, you can copy and paste fields into the GenericCustomer.csv file, using Excel, and import this file into Aloha Takeout.

To stop the Radiant Takeout and Delivery service:

1. Navigate to the **Services** directory.
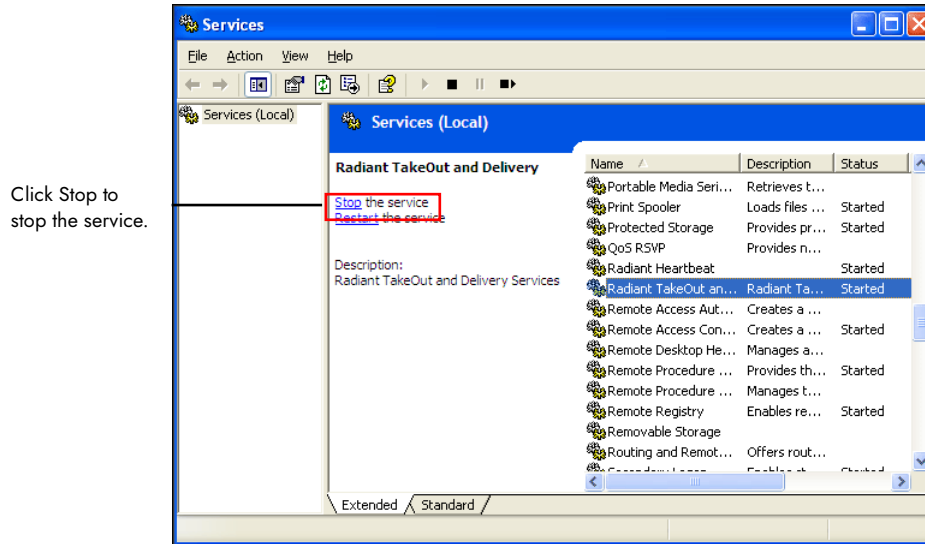
Click Stop to
stop the service.

Figure 11 Services

2. Select **Radiant Takeout and Delivery** and click **Stop**.

To import customer data:

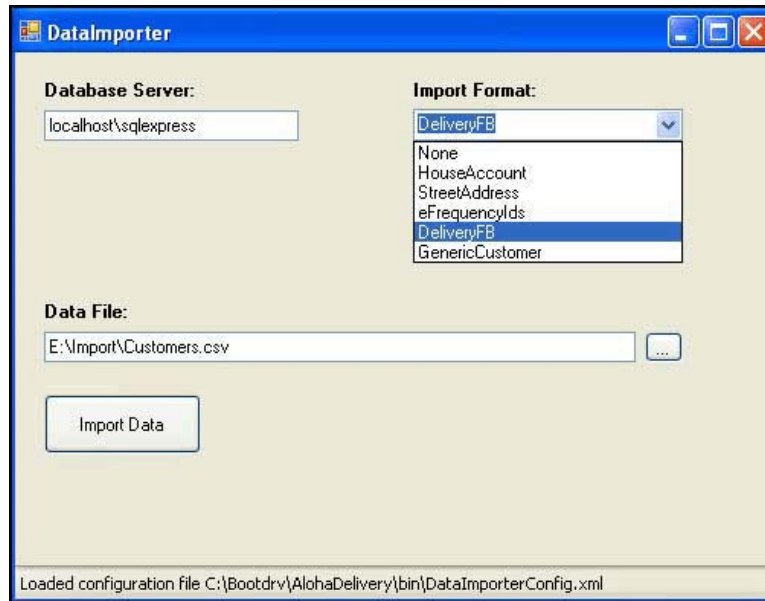1. Launch **DataImporter.exe** from the Aloha Takeout\Bin directory.

Figure 12 User Interface for DataImport.exe

2. Enter **localhost\sqlexpress** as the Database Server name.
3. Select the **format** containing the data information from the 'Import Format' drop-down list.
4. Navigate to and select the **file** in the location where you stored the file to import.
5. Click **Import Data** to complete the data import. The number of successfully imported records appears.
6. Click **Ok**.

To restart the Radiant Takeout and Delivery service:

1. Navigate the **Services** directory (Figure 11).
2. Select **Radiant Takeout and Delivery** and click **Start**.

Using Takeout data protection

The data protection tool manages the encryption keys for the Aloha Takeout product, to protect stored credit card information in accordance with the PCI-DSS specification. The Takeout Data Protection Tool allows the key custodian to establish or change the site key for the Aloha Takeout site. The key custodian should run the Takeout Data Protection tool.

What is the purpose of a site key?

The Aloha Takeout application requires the presence of a site key to collect and store sensitive cardholder information. The site key encrypts the sensitive data before it is stored in the database or transmitted between client terminals and the server. When a customer wants to pay for a transaction with a stored payment card, Aloha Takeout retrieves and unencrypts this information in the background, and passes it to the Aloha Point-of-Sale (POS) system for use with Aloha EDC in the normal payment process. The system also requires the site key for online orders with credit card payments, even though the site may not be storing credit card information with their customers. Until you establish a site key in the system, you cannot enter cardholder information using the ATO application.

Some best practices for site key management are as follows:

- Use a unique site key at each location.
- Restrict access to site keys to the smallest number of employees possible.
- Store site keys in a secure manner.
- Document and implement key management procedures.
- Require key custodians to sign a form affirming they understand and accept their key-custodian responsibilities.
- Generate strong keys, using uppercase and lowercase letters, numbers, and symbols.
- Change the site key at least quarterly, documenting each change of the key.
- Destroy all copies of the old key.
- Establish split knowledge and dual control of keys. For example, give sequential parts of the key to three different people, so that they all have to enter their own part, in a specific order, to reconstruct the whole key. Three parts of an example key could be 'MarYhad&,' 'AliTTle42@,' and 'laMb95&3.' The entire key would consist of these three parts, typed sequentially:

  MarYhad&AliTTle42@laMb95&3

- Prevent unauthorized substitution of the key.
- Replace keys known or suspected to have been compromised.

How does the system store and rotate a site key?

The system stores site key information in the ATO\Data directory in an encrypted file called ATO_SK.dat. When you change the site key, the system changes the name of the existing ATO_SK.dat to ATO_SK1.dat and stores the new site key in ATO_SK.dat. When ATO needs to decrypt credit card information, it attempts to use ATO_SK.dat. If this fails, it tries ATO_SK1.dat, ATO_SK2.dat, etc. until it either decrypts or runs out of site key archives.

In most cases the ATO\Data directory should only contain one ATO_SK.dat file. When you restart the Radiant Takeout and Delivery service, it goes through the stored credit cards in the SQL database and re-encrypts them with the new key. When complete, the system deletes ATO_SK1.dat, and any other archives.

Anytime you establish or modify a site key, you must restart the Radiant Takeout and Delivery service and restart each instance of ATO running on a Front-of-House (FOH) terminal, to allow the new site key to take effect.

Establishing your initial site key

When running the Takeout Data Protection Tool for the first time, the main window appears with the Create Key button available for use.

1. Navigate to **Aloha Takeout\Bin** directory.
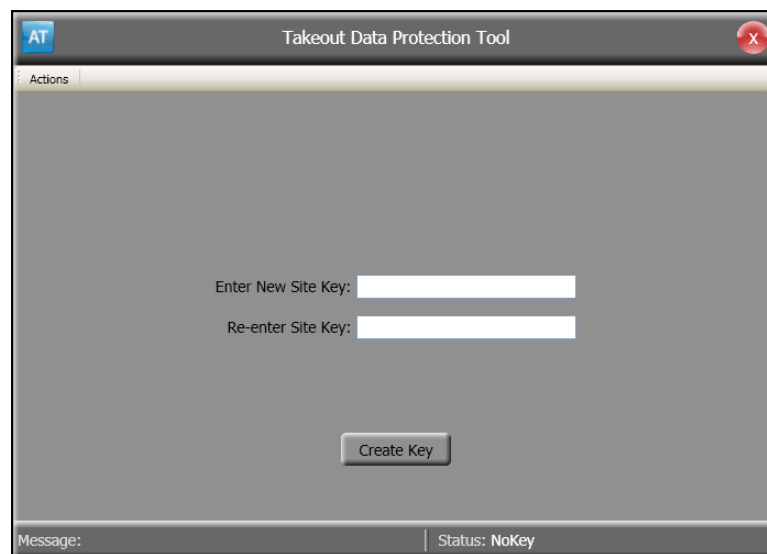2. Double-click **TakeoutDataProtectionTool.exe**.

Figure 13 Data Protection Tool, Site Key Entry

3. Enter and re-enter the **new site key**.
4. After initially entering the site key, the system requires you to enter the site key to perform any further actions.

Once established, the site key remains in effect until changed. Aloha Takeout provides full message support for any errors in key number entry that may occur.

> **Note**
>
> The site key resides in the encrypted file \Aloha Takeout\Data\ATO_SK.dat. If the site key is forgotten or becomes corrupt, you can delete this file and enter a new site key. If this becomes necessary, all stored payment card information becomes unavailable for future use. Contact your NCR Voyix team member for help, before you delete this file.

Changing an existing site key

To rotate the key at a site, you must enter the site key to unlock or select Change Site Key from the Actions menu.

The form for changing the site key is similar to the form for setting the initial site key. In addition to the two fields for entering the new site key, you first receive a prompt to supply the existing site key. When you click Change Key, the tool validates the supplied existing key matches the value stored within the ATO system. The application also validates that both of the new key strings are identical. If the validation criteria are satisfied, the system saves the new key to the system. If any criteria fails validation, you receive a prompt to re-enter the keys.

1. Navigate to the **AlohaTakeout\Bin** directory.
2. Double-click **TakeoutDataProtectionTool.exe**.
3. Type the **current key** in 'Enter Site Key.'
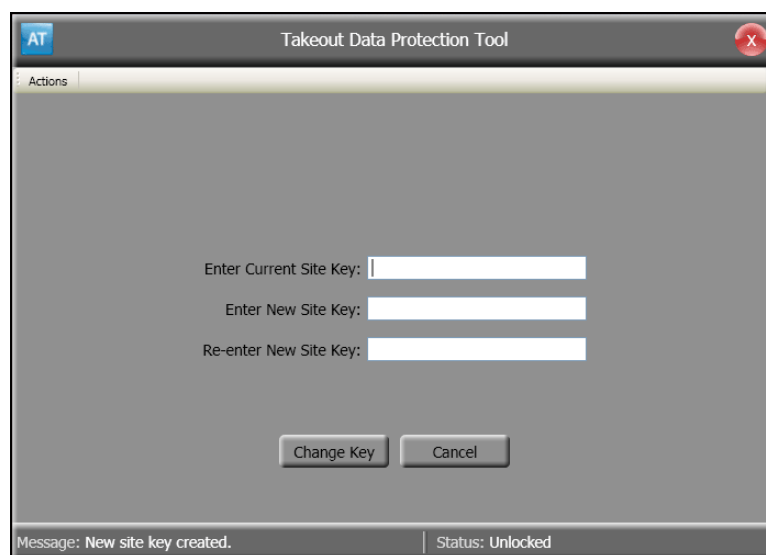4. Click **Actions**.
5. Click **Change Site Key**.

Figure 14 Data Protection Tool, Rotate Site Key

6. Type the **existing site key** in 'Enter Current Site Key.'

7. Type the **new site key** in 'Enter New Site Key.'

8. Re-type the **new site key** in 'Re-enter New Site Key.'

9. Click **Change Key** to confirm the change.

10. Re-type the **new site key** in 'Re-enter New Site Key.'

Clearing credit card data

The Takeout Data Protection Tool also allows you to clear stored credit card information at a site.

1. Navigate to the **AlohaTakeout\Bin** directory.

2. Double-click **TakeoutDataProtectionTool.exe**.

3. Type the **current key** in 'Enter Site Key.'
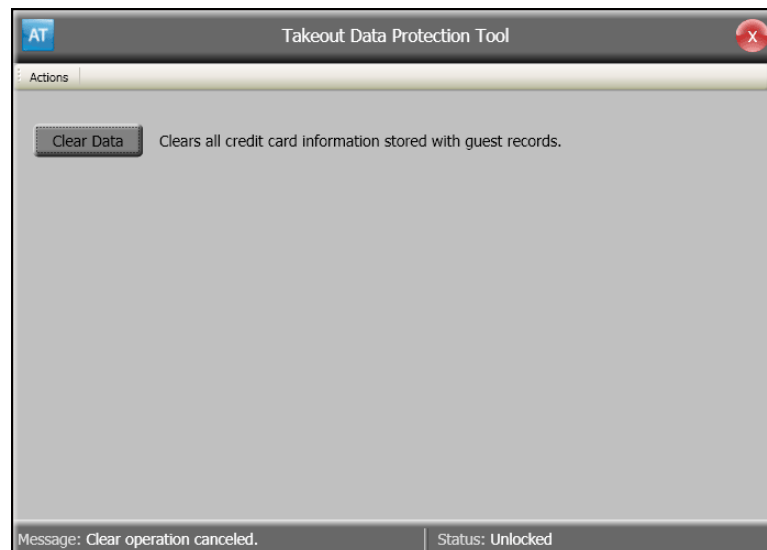
4. Click **Unlock**.

Figure 15 Data Protection Tool, Clear Data

5. Click **Clear Data**.

6. Click **Yes** to confirm clearing all credit card information from the ATO database.

Using Takeout Database Tool

Use Takeout Database Tool to perform automatic functions on the Aloha Takeout database. Use this utility only during installation and before the store goes live, unless instructed by a support team member.
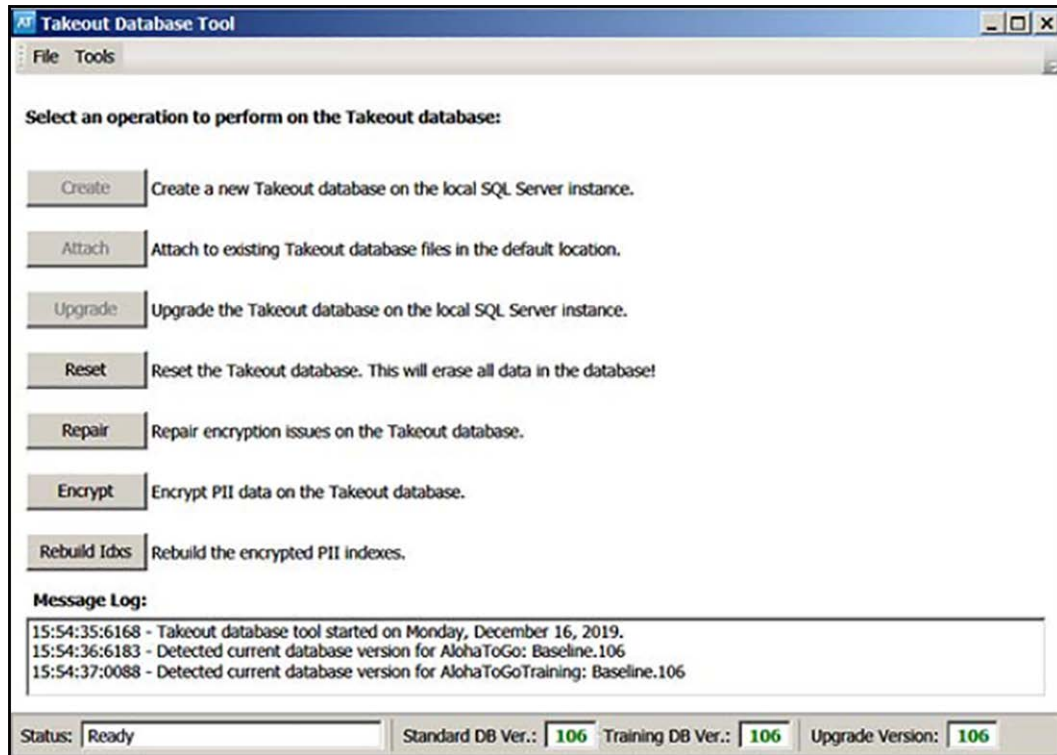

Figure 16 Takeout Database Tool

You can use Takeout Database Tool to:

Create — Creates a new blank Aloha Takeout SQL database with the current schema version. If the Aloha Takeout service detects a database is attached to SQL Express, this button is not available. Aloha Takeout creates the SQL Express database during the Server installation; however, you can use this button if the database becomes detached, is deleted, or is renamed by mistake.

Attach — Attaches a database to SQL Express for use with Aloha Takeout in the event the database becomes detached. If the Aloha Takeout service detects a database attached to SQL Express, this button is not available.

Upgrade — Migrates the database to the current schema version. The Aloha Takeout installation process updates the database to the current schema version; however, in the event you need to restore a backup from a previous schema version, the Standard or Training database versions, shown at the bottom of the screen, may not be in sync. If they do not match, they appear in read. Matching versions appear in green.

Reset — Clears all customer and order data from the database. Use Reset to clear all current and historical customer and order data entered during training before 'going live.'

Repair — Repairs encryption issues on the Takeout database.

Encrypt — Encrypts all Personal Identity Information (PII) in the Takeout database.

> **Note**
>
> The Repair and Encrypt options can take several hours to complete for some databases. The process may appear frozen because of the time required. Allow sufficient time for the process to complete.

Rebuild Idxs — Rebuilds the encrypted PII indexes after repair or encryption.

> **Caution**
>
> Do not use the Reset function once the store is actively adding customers and creating takeout orders.

Aloha Takeout Utilities, User Guide

NCR Voyix welcomes your feedback on this document. Your comments can be of great value in helping us improve our information products. Please contact us using the following email address: Documentation.HSR@NCRVoyix.com