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About This Guide

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

This guide provides you with general information on each function of the Maintenance menu in Aloha Manager and gives you definitions for the options you may need to complete on the various Maintenance menu screens.

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

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

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

**Related Requirements** — Indicates the additional, **mandatory** steps or processes you must perform for the current option to function properly.
Documentation for the additional menus in Aloha Manager, including the Functions, Reports, Utilities, Labor Scheduler, and Tools menus, are available in separate guides:

- QuickService Report Guide
- Aloha Labor Scheduler User Guide
- Various new Feature Focus Guides

The Panel Editor function is also available in a separate guide.

Refer to the enhancement release document to learn about the new features available in QuickService version 6.2.
Is This Guide for You?

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

This guide is not a procedural guide that shows you step-by-step instructions on how to use QuickService.

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

This guide assumes you have the following knowledge:

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

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

**Chapter 1: About Aloha Manager**

This chapter discusses what QuickService is and provides the features and benefits of the application. This chapter also explains how to launch, log in, and navigate within QuickService. Additionally, this chapter provides screen component descriptions, and describes common menus, and buttons used in the system.

**Chapter 2: Store Settings**

This chapter discusses the Store Settings functions within Aloha Manager. You will gain an understanding of each store settings group, the available functionality for each group, and how to create customized settings for your store.

**Chapter 3: Labor Maintenance Functions**

This chapter explains how to create and maintain employee files, job codes, access levels, and other labor related settings.

**Chapter 4: Menu Maintenance Functions**

This chapter outlines setting up items, taxes, modifiers, and categories, and how they interact with the menu system.

**Chapter 5: Payments Maintenance Functions**

This chapter discusses creating and setting up payment tenders, promotions, comps, gift certificates, house accounts, and foreign currencies.

**Chapter 6: System Maintenance Functions**

This chapter discusses the features available in Aloha Manager that relate to adding and creating events, order modes, revenue centers, and defining void reasons, no sale reasons and petty cash accounts.
Chapter 7: Hardware Maintenance Functions

This chapter discusses the setup and configuration of hardware that is typically attached to the Aloha system, such as terminals, cash drawers, printers, display boards, and remote display system devices.

Chapter 8: Messages Maintenance Functions

This chapter discusses the features available on the Messages menu. These are used to generate messages for communicating with individual employees, the restaurant staff, or the staff.

Glossary

Index
Conventions Used in This Guide

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

Symbols and Alerts

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

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

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

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

- **Points** to a useful hint that may save you time or trouble.
# Text Conventions

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

<table>
<thead>
<tr>
<th>Example</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click Save</td>
<td>Indicates buttons that require activation by a mouse, or by a function key on the keyboard.</td>
</tr>
<tr>
<td>Press Tab</td>
<td>Indicates keys you press on the keyboard.</td>
</tr>
<tr>
<td>Maintenance &gt; Labor &gt; Job Codes</td>
<td>Indicates the order to use for selecting menu items.</td>
</tr>
<tr>
<td>&gt; Job Codes tab</td>
<td></td>
</tr>
<tr>
<td>Ctrl+Tab</td>
<td>Indicates key commands. The plus sign indicates to hold down the first key and press the second key.</td>
</tr>
<tr>
<td>‘Get Check’</td>
<td>Indicates the name of options and other screen elements.</td>
</tr>
</tbody>
</table>
About Aloha Manager

This chapter provides introductory information about the Aloha Manager Back-of-House application for Aloha QuickService. This chapter explains how to log in to and navigate within the application. This chapter also provides information about parts of the screen, and common menus and common buttons.

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Introducing Aloha QuickService

Aloha QuickService is a restaurant management application specifically designed to meet the ever-changing restaurant needs of today; from the casual dining, fast-paced restaurant, to the stand-alone kiosk. QuickService provides a superior solution for all your restaurant management needs.

Aloha QuickService effectively supports the single restaurant environment, as well as the multiple-store corporate chain environment.

Aloha QuickService offers advanced point-of-sale functionality, intuitive touch screens, open architecture, built-in redundancy, extensive Front-of-House reporting, and much more. The modular, upgradeable design allows QuickService to grow with your business, which accommodates your future needs and helps you maximize the life and value of your investment.

With Aloha QuickService, it’s easier than ever to enter orders, manage guest checks, run promotions, and process payments. Whether you’re printing individual, combined or split checks, or modifying orders, QuickService makes it quick and efficient. And with extensive Front-of-House reporting, managers can spend more time with customers while still keeping up with restaurant and server performance.

Benefits

You can benefit from Aloha QuickService the very first day of use. With QuickService, you:

- Increase speed of service.
- Reduce waste by ensuring order accuracy.
- Decrease labor dollars and hours spent training employees.
- Increase control over the restaurant with real-time management reporting at the POS.
- Drive topline growth by delivering an exceptional dining experience time after time.
Key Features

Aloha QuickService offers an extensive list of features, including:

**Zero-Training UI™** — Utilizes intuitive touch-screen interfaces that enable you to touch the screen to place orders, run reports, and perform many other vital tasks directly from the Front-of-House (FOH) terminal.

**Built-in redundancy** — Provides an ‘always on’ environment. If a terminal fails, the sales information resides in duplicate on the file server. If the file server fails, one of the order entry terminals takes over its functions until it returns to service.

**Customizable user interfaces** — Enables you to define different interfaces for different types of employees, and maximizes the best method to get the right information to the right type of employee.

**User customizable screens and screen flow** — Enables you to design and use order entry screens that support and facilitate your unique type of restaurant. You can customize unique screens that provide quick access to employee functions, time punches, and lead your employees through the order entry and payment process.

**Cash Accountability** — Supports cash accountability for employees using a cash drawer and provides a method to ‘count down’ and reconcile their drawer.

**Menu management** — Enables you to program items on your menu quickly and easily.

**Order entry management** — Allows you to handle voids, order changes, and other on-demand situations effortlessly through the FOH order entry system, and eliminates unnecessary kitchen preparation errors and trips to and from the kitchen.

**Comprehensive reporting** — Provides complete information about sales, inventory, profit, replenishment, and includes real-time sales statistics, product mix reports, employee check-in statistics, server sales, server performance measures, and more.

**Server performance measurements** — Determine which employees go the extra mile to increase sales for your establishment and aides you in conducting employee sales contests.

**Built-in security** — Configures security-level access to provide access to specific employees to both the FOH and BOH.
Multiple job codes and per-employee access levels — Establish multiple job descriptions for each employee, with access levels to match each job code.

Optional Packages

Additional feature packages are available for use in which Aloha QuickService interfaces. Some of those optional packages include:

- Aloha Electronic Draft Capture (EDC)
- Aloha Meal Accountability
- Aloha PMS Interface
- Aloha Video Display System
- Aloha Quick Count
- Aloha Delivery/Frequent Buyer
- Aloha Gift Certificate Manager

For a complete list of optional packages, visit our Web site at [www.radiantsystems.com](http://www.radiantsystems.com), or contact your Radiant Systems representative.
Viewing System Requirements

We strongly recommend you adhere to the following minimum system requirements to successfully operate Aloha QuickService in your business.

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

Aloha BOH File Server Hardware Requirements

Hardware requirements must meet or exceed the recommended requirements of the operating system. Add additional memory and increase the processor speed to compensate for heavy use, third-party software, and usage unrelated to the Aloha application software.

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<th>Non-SuperSite</th>
<th>SuperSite</th>
<th>Comments</th>
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<td>Database Software</td>
<td>None (.dbf files)</td>
<td>Microsoft SQL Server 2000</td>
<td></td>
</tr>
<tr>
<td>Hard Drive</td>
<td>EIDE, 20 GB</td>
<td>Ultra3 SCSI or Serial ATA, 40 GB, RAID 5</td>
<td>The Aloha application software uses less than 100 MB when initially installed but requires approximately 3 MB per historical day (SuperSites require approximately 3 MB per store per historical day)</td>
</tr>
<tr>
<td>Memory</td>
<td>128 MB</td>
<td>1 GB or 32 MB per store (whichever is higher)</td>
<td></td>
</tr>
<tr>
<td>Network Card</td>
<td>10-Base-T</td>
<td>10/100-Base-T</td>
<td></td>
</tr>
<tr>
<td>Parallel or USB Port</td>
<td>Yes</td>
<td>Yes</td>
<td>Required for HASP security key</td>
</tr>
<tr>
<td>Processor</td>
<td>500MHz</td>
<td>Minimum 3 GHz (varies with number of stores)</td>
<td></td>
</tr>
<tr>
<td>Video Adapter</td>
<td>16 Bit Color</td>
<td>16 Bit Color</td>
<td></td>
</tr>
</tbody>
</table>
Aloha FOH Order-Entry Terminal Requirements

You must meet or exceed the following recommended requirements of the operating system. Add additional memory and increase the processor speed to compensate for heavy use, third-party software, and usage unrelated to the Aloha application software.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Non-SuperSite</th>
<th>SuperSite</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Drive</td>
<td>IDE, 2 GB</td>
<td>IDE, 4 GB</td>
<td>The Aloha application software uses less than 50 MB (SuperSites require approximately 2 MB per historical day)</td>
</tr>
<tr>
<td>Memory</td>
<td>64MB</td>
<td>64MB</td>
<td></td>
</tr>
<tr>
<td>Network Card</td>
<td>10-Base-T</td>
<td>10-Base-T</td>
<td></td>
</tr>
<tr>
<td>Processor</td>
<td>350MHz</td>
<td>350MHz</td>
<td></td>
</tr>
<tr>
<td>Video Adapter</td>
<td>16 Bit Colors</td>
<td>16 Bit Colors</td>
<td></td>
</tr>
</tbody>
</table>

The order-entry terminal requirement list does not include peripherals, such as receipt printers, magnetic stripe readers, customer displays, and more.

Dedicated Server Requirements

In large and complicated POS environments, you can install the EDC, PMS and BackOffice programs on a separate dedicated file server to lessen the burden of the Aloha BOH file server and increase fault tolerance. This setup is generally limited to SuperSites; however, you can use these types of file servers at any site.

You must meet or exceed the following recommended hardware requirements of the operating system. Add additional memory and increase the processor speed to compensate for heavy use, third-party software, and usage unrelated to the Aloha application software.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Recommended</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hard Drive</td>
<td>EIDE, 10 GB</td>
<td></td>
</tr>
<tr>
<td>Memory</td>
<td>128 MB</td>
<td></td>
</tr>
<tr>
<td>Network Card</td>
<td>10/100-Base-T</td>
<td></td>
</tr>
<tr>
<td>Processor</td>
<td>500MHz</td>
<td></td>
</tr>
</tbody>
</table>
Getting Started in Aloha QuickService

This section introduces you to the Aloha QuickService Back-of-House application. This section discusses how to log in, and navigate within Aloha QuickService. This section also describes the main screen components of the system, and gives you a preview of the commonly used tools, buttons, and menu functions.

Understanding Aloha Security

Aloha QuickService uses security levels to manage access privileges in the system. A system administrator or manager assigns different security levels to each employee, based on the job role they need to perform. When you log in to Aloha QuickService, you can access only those areas or functions permitted by your security level.

Aloha QuickService provides a single-source security feature that manages access to the Back-of-House (BOH) system, as well as the Front-of-House (FOH) order entry terminals.

You access both the BOH and FOH systems with a single employee ID (i.e. user name) and password. This process avoids complexity, as it requires managers and employees to memorize only one user name and password.

This security feature also enables card readers to interface easily with Aloha QuickService. You need only one card to access the BOH and FOH systems.
Logging In to Aloha Manager

You must log in to Aloha Manager (QuickService) before you can begin to use the system. Your system administrator or manager provides you with your user name and initial password information. We recommend you change your password the first time you log in to Aloha Manager, for security purposes.

Select Start > Programs > Aloha > QuickService to launch the application. You can also create a shortcut on your computer desktop from which you may launch the application.

When you launch QuickService, the Aloha Manager Login dialog box appears.

Figure 1-1  Log In Screen
Type a user name and password in the respective boxes, then click OK to log in to Aloha Manager. The Aloha Manager main screen appears with available features, based on your assigned security access level.

**Changing a Password**

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

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

![Figure 1-2 Aloha Manager Main Screen](image)

![Figure 1-3 Change Password Dialog Box](image)
Type your Old Password, and type your new password in the ‘New Password’ and ‘Re-enter Password’ text boxes, then click OK to activate the new password.

If the old password is incorrect, or the information in the ‘New Password’ and ‘Re-enter Password’ text boxes does not match, an error message appears. At this point, try again or click Cancel to exit the Change Password dialog box.

**Deleting a Password**

If you forget your current password, a system administrator or manager can delete your old password, which allows you to log in to Aloha Manager and immediately create a new password.

Select Maintenance > Labor > Employees from the main menu, then access the Back Office Security tab and click Clear Back Office Password, to delete a password.

After you log in, type your new password in the ‘New Password’ and ‘Re-enter Password’ text boxes, then click OK to activate the new password.

If the information in the ‘New Password’ and ‘Re-enter Password’ text boxes does not match, an error message appears. At this point, try again or click Cancel to exit the Change Password dialog box.

![New Password Dialog Box](image)
Identifying Parts of the Screen

The Aloha QuickService functions share common screen components, which make it easy for you to learn how to navigate and work within the various functions. When you access a function, the appearance of the screen changes to display its full functionality.

The following components appear on a typical Aloha QuickService screen:

**Title bar** — Displays the name of the application.

**Menu bar** — Provides access to menu items and tasks on the File, Functions, Reports, Maintenance, Utilities, Labor Scheduler, Tools, View, and Help menus.
**Navigation bar** — Provides quick access to the major functions of the system, as well as external applications, as necessary. The navigation bar appears on the left side of the QuickService screen. See “Navigating in Aloha Manager” on page 1-14 for more information about the Navigation bar.

**Function bar** — Displays the name of the current, active function.

**Tabs** — Divides and organizes the related features of a given function, into smaller, separate, more manageable work areas. Multiple tabs make it less cumbersome to work with the specific function.

**Function tabs** — Displays, at the bottom of a function screen, additional QuickService functions that are currently open. You can have up to 13 function tabs open at a time. If there are too many tabs open to fit in the application window, buttons appear in the bottom right corner for you to scroll through the tabs.

**Back button** — Returns you to the most recently used function screen. For example, in the Items function, if you click the Printer button on the Item tab to launch the Printers function, and then click Back, you return to the Items function.

**Close button** — Closes the active, selected function screen.

**Logout** — Logs you out of QuickService; but, does not close the application.

**Exit** — Logs you out of QuickService and closes the application. Ensure all functions are closed before you exit the application.
Navigating in Aloha Manager

Aloha QuickService enables you to access screens, menus, and other applications or tools through the Navigation bar, as well as common keyboard commands.

For increased back-office security, configure Aloha Manager so that employees cannot shut the application down (it runs as a service immediately upon system start up). Since you can run all applications, whether they are Aloha software or not, from Aloha Manager, there is no reason to leave its controlled environment.

Understanding the Navigation Bar

The Navigation bar appears on the left side of the screen. It enables you to launch assigned functions without the need to select those functions from the Menu bar. It also enables you to launch commonly used tools, such as MS Word, Excel, or other third-party applications located on your workstation or on a connected network.

The Navigation bar uses assigned groups, which contain shortcuts, that you use to quickly access specific functions, menus, or applications. There are three different types of groups; User, Shared, and User tools.

User Groups

You set up User groups for your own personal use. When you log in to the system, the user-specific groups appear on the Navigation bar. Every employee may define customized user groups to display on their Navigation bar for their personal use. However, the functions that can be added to the user group are determined by the security level to which they are assigned.

Shared Groups

Shared groups are available to every employee that logs in to the system. However, any function to which the employee does not have access appears with a padlock. Only those employees assigned to a security level with the Shared Navigation bar configuration function active, can utilize shared groups.
**User Tools Groups**

A User Tool group enables you to access applications available on the back-office system or a connected network. Microsoft Word and Excel are examples of user tools. Only those employees assigned to a security level with the User Tools Configuration function active, can utilize a user tools group. With a User Tool group, you can access applications directly from the Tools menu, without the need to leave the Aloha Manager screen. And you can place user tools on the Navigation bar, after you add them to the Tools menu.


**Navigating with the Mouse**

Aloha QuickService also enables you to navigate through the various screens and menus in the system with a mouse, a keyboard, or a combination of both. Use the navigation method that is best for your environment.

As with all Windows applications, you can use the mouse to make major selections in Aloha QuickService. You can select items from menus, select tabs within a function screen, click in option boxes to type information, and click command buttons to perform system functions.

**Navigating with Keyboard Shortcuts**

Use keyboard combinations to quickly navigate through or make selections on the screens within Aloha QuickService.

<table>
<thead>
<tr>
<th>Keyboard Combination</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>F4</td>
<td>Displays the drop-down list for the active text box, if applicable.</td>
</tr>
<tr>
<td>F10 or Alt</td>
<td>Activates the menu bar so you can use the keyboard to select a menu command. Use the right or left arrows to make a menu selection.</td>
</tr>
<tr>
<td>F12</td>
<td>Toggles between the HTML page and the open function tab(s).</td>
</tr>
<tr>
<td>Alt+down arrow (while in a field)</td>
<td>Display a list of options for the specific field.</td>
</tr>
<tr>
<td>Keyboard Combination</td>
<td>Function</td>
</tr>
<tr>
<td>----------------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Alt+underlined letter</td>
<td>Accesses a function on an active menu, menu bar, or other option, that displays an underlined letter. For example, to access the Payment tab, press <strong>Alt+P</strong>.</td>
</tr>
<tr>
<td>Ctrl+C</td>
<td>Copies highlighted data to the Windows Clipboard for subsequent use in another location.</td>
</tr>
<tr>
<td>Ctrl+X</td>
<td>Removes (cuts) highlighted data and copies it to the Windows Clipboard for subsequent use in another location.</td>
</tr>
<tr>
<td>Ctrl+V</td>
<td>Pastes information from the Windows Clipboard to an active location, with the cursor designating the point of insertion.</td>
</tr>
<tr>
<td>Ctrl + right or left arrow</td>
<td>Scrolls through open function tabs.</td>
</tr>
<tr>
<td>Ctrl+Tab</td>
<td>Moves to the next tabbed screen.</td>
</tr>
<tr>
<td>Escape</td>
<td>Exits a function.</td>
</tr>
<tr>
<td>Shift+Tab</td>
<td>Moves backward one option at a time.</td>
</tr>
<tr>
<td>Space bar</td>
<td>Selects or clears an option. Click a check box or option to activate/deactivate the setting, or tab to the desired setting and press the Space bar to select or clear an option.</td>
</tr>
<tr>
<td>Tab</td>
<td>Move forward one field at a time.</td>
</tr>
<tr>
<td>Up and Down arrows</td>
<td>Moves forward or backward through the records in the database file.</td>
</tr>
</tbody>
</table>
Using Menu Selections

All QuickService functions are available on the menu bar. This section describes the purpose of each menu.

File Menu

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

Functions Menu

The Functions menu provides access to manage basic labor and employee schedule functions. You also use this menu to assign checkouts, distribute tips to employees, and edit and post to house accounts. Additionally, you can access third-party accounting applications through the Functions menu.

Reports Menu

The reports menu provides a host of built-in reports that captures vital information for your business, such as product sales, server performance, payment and transaction data, labor information, audit information, and more.

Maintenance Menu

The Maintenance menu enables you to create your Aloha database. Use this menu to define and maintain the database components and parameters you need to run your restaurant. From the menu items you offer at your restaurant, to the hardware you use and the employees you hire, use this menu to store all database information.

Utilities Menu

The Utilities menu enables you to perform data verification, database upgrades, and end-of-day functions.
Labor Scheduler Menu

The Labor Scheduler menu provides access to the advanced, yet simple-to-use Aloha Labor Scheduler application. This application enables you to create employee work schedules based on shift requirements for each work day.

Tools Menu

The Tools menu enables you to customize and assign shortcut groups to your Navigation bar. The Navigation bar uses assigned group shortcuts (i.e., User, Shared, and User tools) to quickly access specific functions, menus, or applications. The Tools menu also displays the list of User tools you create.

View Menu

The View menu allows you to display or hide the Status and Navigation bars.

Help Menu

The Help menu displays a dialog box that lists copyright and version information about Aloha Manager.

Using the Right-Click Menu

The right-click menu provides support for you to copy and delete records, and ranges of records, when you are on a function screen. This feature is extremely useful when you need to build a database because it helps you add or delete records in the Aloha database quickly, as necessary.

All copy, edit, and delete changes made with the right-click menu functions are permanent. It is important to be extremely careful and plan changes carefully before you copy or delete records or ranges of records.

For example, let’s say you create and configure one steak, one salad, one soup, one sandwich, one hamburger, one non-alcoholic drink, one beer, one mixed drink, and one dessert in the database. Then, you test each item for correct function in the database. After you successfully test these example items, use the right-click menu to make copies of each of the items to complete the remainder of the menu; then, edit each copied item to give it unique characteristics.
The database editing tools on the right-click menu are available only if the function tab is not in edit mode. To access the database editing tools, place the mouse pointer in a vacant area of a function screen, and click the right mouse button. A menu appears, with the following options:

- Copy Item
- Copy Range of Items
- Delete Range

If the function screen is in edit mode, the menu displays, but all options on the menu are unavailable. Also, if you make a selection that is not appropriate for the active function screen, a message appears to indicate the menu option is not available.

**Copy Item**

The Copy Item feature copies an item (i.e. record) and all selected attributes to a specific destination in the database. Use the Copy Items dialog box to indicate the attributes and modifiers to copy, and the destination of the copied item.

You can copy an item to a single location, or to multiple locations. And you can overwrite existing items or create new items. To overwrite existing items, select the items you want to overwrite in the Begin and End drop-down lists.
If you want to overwrite a single item, select the same item in both the Begin and End drop-down lists. To create one or more new items, type the beginning and ending numbers in the respective text boxes, or select existing items from the drop-down lists. The system overwrites any new items you select in these text boxes.

Figure 1-6 Copy Items
Copy Range of Items

The Copy Range of Items feature copies a range of items to a specified destination in the database. The functions available in the Copy Range of Items dialog box are very similar to those in the Copy Items dialog box.

Create New Items — Creates new items in the database; replaces any items selected or implied in ‘To Range.’

Condense Items — Reduces the blank spaces in the database until items are added into them.

Spacing (Cond. mode) — Determines the numeric interval between numbers assigned to new records. For example, if you select ‘Condense Items’ and type 5 in ‘Spacing (Cond. mode),’ new items are numbered in sequence of five (e.g., 2000, 2005, 2010, 2015, and so on), which leaves four unused item numbers between each new item.
Delete Range

The Delete Range feature deletes items from a specified range. Use this feature to delete a single item or multiple items.

To delete a range of items, select the items to delete in the ‘From’ and ‘To’ drop-down lists.

If you want to delete a single item only, select the same item in both the ‘From’ and ‘To’ drop-down lists.

To delete a single record quickly, access the record from the appropriate function screen, and use the Delete command button.
Using Common Command Buttons

Several common button functions are available on the function screens in Aloha QuickService. The functions of these buttons are the same in all situations, and are similar to buttons used in many Windows applications.

**Save** — Saves data to the Aloha database any time you add a new record or change an existing record. If you do not click Save, the system does not store your additions or changes.

**Edit** — Displays a record in edit mode when you click Edit, press Enter, or click anywhere in the function.

**Cancel** — Exits a function tab without saving additions or changes to the Aloha database.

**Delete** — Removes an active record from the Aloha database. Delete records with great caution, as deleted records may cause serious errors due to the relational nature of the Aloha database structure.

**Recipe** — Enables you to add a recipe to an item.

**Quick Count** — Enables you to access the Quick Count feature in order to add the current item as a tracking item.

**Apply** — Saves changes to the Aloha database, and keeps the current function screen active, for further edits.

**Done** — Exits the function screen.
Using HTML Pages

Aloha QuickService dedicates the center right portion of the Aloha Manager start up screen to host HTML pages, and enables you to switch between the active function screens and the HTML page associated with your login information.

![Example HTML Page](image)

*Figure 1-9 Example HTML Page*

Use this feature to:

- Provide managers with access to important information such as restaurant policies and procedures, or to update managers with current news from the corporate office.
- Run a local version of the company Intranet.
- Provide links to Internet sites, if Internet access is available. If an establishment uses Enterprise, it typically limits Internet access to the Aloha enterprise.com Web site for that establishment. However, if you prefer to offer your employees wider Internet access, you can add additional links to the start up HTML page for the employees.
For example, you can assign a Manager.htm page to the ‘Manager’ security level and download this file to each of your restaurants. This file might contain links to other HTML pages, such as Policies.htm, or CurrentNews.htm, which are also sent to the sites. When a manager at one of the sites logs in, the Manager.htm page appears. The manager can click on the provided links to access the Policies.htm and CurrentNews.htm pages, to read about the latest information from corporate.
Store Settings

This chapter discusses the Store Settings functions with the Aloha system. You will gain an understanding of each store settings group, the available functionality for each group, and how to create customized settings for your store.

Order Entry ................................................................. 2-4
Labor ................................................................. 2-11
Financials .............................................................. 2-37
Printing ................................................................. 2-49
Printing-Chits ....................................................... 2-65
User Interface ......................................................... 2-81
Security ................................................................. 2-93
System ................................................................. 2-102
International ......................................................... 2-119
Credit Card ............................................................ 2-131
Delivery ................................................................. 2-140
Gift Card/Certificate Sales ................................. 2-147
Quick Count .......................................................... 2-154
Video Group ......................................................... 2-157
Hotel ................................................................. 2-165
Survey ................................................................. 2-168
Token Distribution .................................................. 2-170
Use the Store Settings function to configure system functionality that is global throughout the entire restaurant; however, if you select certain options in other areas of the user interface, these options take precedence over the options selected here in Store Settings. We specify in the definition for an option when it overrides any option here in Store Settings.

The Store Settings function separates the options into “groups” based on the area of the system affected by the options. The system provides default values for some of the options, and although you do not have to edit them, you should review them to ensure they are applicable for your restaurant environment.

To access Store Settings, select Maintenance > Store Settings.

![Figure 2-1 Store Settings Menu Option](image)

*Figure 2-1 Store Settings Menu Option*
Order Entry

Use the Order Entry group to establish policies and procedures related to entering orders in the FOH. The options in the Order Entry group allow you to define:

- Guest count calculations.
- Requirements for scales and SKU numbers not found in the system.
- Requirements for the Pizza Modifiers feature.
- Requirements for the Advance Orders feature.
- Order entry screens that particular job codes receive.

To access the Order Entry group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group.

The Order Entry group provides the following tabs: Guest Counts, Options, Pizza, and Advance Orders.

**Guest Counts Tab**

Use the Guest Counts tab to calculate guests by entrees and select the category for counting.
**Use Entrees for Guest Counts** — Calculates the guest count using the number of entrees sold from the category selected in the ‘Category’ drop-down list. Each time you order an item from the selected category, the guest count increases by one. The system does not prompt for a guest count. Typically, this is used for entrees but you can use any category of items to count guests, such as drinks. *Related Option:* To enable items to hold more than the default weight of one, enter an amount greater than one in the ‘Default Weight’ option in Maintenance > Menu > Items > Item tab.

**Category** — Designates the category to use for guest counts. If you need to add or modify a category, click Category to access the Categories function. When you modify a category, the change applies to all items assigned to that category.

**Use Next Seat for Guest Counts** — Enables you to count each sub-order as a guest when using the Sub-Orders feature. *Related Option:* If you select this option with ‘Use Entrees for Guest Count,’ the system determines the guest count using the ‘Use Entrees for Guest Count’ feature.

Refer to the Sub-Orders Feature Focus Guide for more information on configuring and using the Sub-Orders feature.

---

### Options Tab

Use the Options tab to define the requirements for scales and the open item to use if a SKU number cannot be found.
Select the Options tab from the Store Settings > Order Entry group.

Use this Open Item if the Order Taker enters an SKU# that cannot be found: — Designates the default item to use when the system cannot read the SKU number. Related Option: To associate a SKU number with an item, type the number in the ‘SKU Numbers’ option in Maintenance > Menu > Items > Miscellaneous tab.

Scale Group Box

Use the Scale group box to define the timeout value and the message to use for manually entered weights.

Refer to the Scales and Tares Feature Focus Guide for more information on configuring and using scales.

Scale Timeout Value — Specifies the number of seconds the system waits for a scale reading before it times out. The POS system must receive three consecutive identical scale readings for one instance, before accepting a reading. When the system exceeds the number, you have the option to retry a reading or make a manual entry. Type a value from three to 99 seconds. The default number of seconds is five.
**Manual Weight Message** — Defines the text to print on the guest check when you enter a manual weight. Type up to 15 alphanumeric characters. The default text is ‘MAN WT.’

**Pizza Tab**

Use the Pizza tab to establish pizza pricing options, the category of items from which the FOH Pizza screen displays, and define items to associate with the left and right sides of pizzas.

Refer to the Pizza Modifiers Feature Focus Guide for more information on configuring and using the Pizza Modifiers feature.

Select the Pizza tab from the Store Settings > Order Entry group.

![Store Settings - Order Entry Group - Pizza Tab](image)

**Figure 2-4** Store Settings - Order Entry Group - Pizza Tab

**Pizza** — Specifies the category of items from which the Pizza Modifiers screen displays. If you need to add or modify a category, click Pizza to access the Categories function. When you modify a category, the change applies to all items assigned to that category.

**Left Half** — Specifies the item to represent the left half of the pizza. The name of this item appears on the guest check when using the Pizza Modifiers feature. If you need to add or modify a ‘Left Half’ item, click Left Half to access the Items function.
**Right Half** — Specifies the item to represent the right half of the pizza. The name of this item appears on the guest check when using the Pizza Modifiers feature. If you need to add or modify a "Right Half" item, click Right Half to access the Items function.

**Pizza Portion Pricing Group Box**

Use the Pizza Portion Pricing group box to determine the pricing method used on pizza halves.

**Percentage Pricing** — Prices pizza halves based on a percentage of the base topping price. For example, if you enter 60% as the percentage and the charge for a pizza topping is $1.00, then the charge for a half topping is $0.60. Percentage Pricing is the default selection and the default percentage is 50%.

**Average Pricing** — Prices pizza halves based on the average of the combined price of the left and right halves. For example, if a customer orders a pizza with a base price of $12.00 and wants bacon - $1, extra cheese - $0.75, and onions - $0.50 on the right half, and only green peppers - $0.50 on the left half, the average price is calculated based on the following:

<table>
<thead>
<tr>
<th>Right Half</th>
<th>$14.25</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left Half</td>
<td>$12.50</td>
</tr>
<tr>
<td>[\frac{14.25 + 12.50}{2}] =</td>
<td>$13.38</td>
</tr>
</tbody>
</table>

**Higher Priced Item Charged** — Prices both pizza halves with the price of the higher priced half. For example, if a customer orders a pizza with a base price of $12.00 and wants bacon - $1 on the right half, and extra cheese - $0.75 on the left half, the price is calculated based on the following:

<table>
<thead>
<tr>
<th>Right Half</th>
<th>$13.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left Half</td>
<td>$12.75</td>
</tr>
</tbody>
</table>

Result: The customer is charged the higher price of $13.00.
**Whole Price for Topping** — Calculates toppings at full price and allows no variations for split toppings. For example, if a customer orders a pizza with a base price of $12.00 and wants bacon - $1 on the right half, and hamburger - $1.00 on the left half, the price is calculated based on the following:

- Base Price: $12.00
- Bacon: $1.00
- Hamburger: $1.00
- Total: $14.00

**Advance Orders Tab**

Use the Advance Orders tab to establish how you place advance orders in order entry queues, and to define the default increment for preparation time.

Refer to the Advance Orders Feature Focus Guide for more information on the Advance Orders feature.

Select the Advance Orders tab from the Store Settings > Order Entry group.

*Figure 2-5 Store Settings - Order Entry Group - Advance Orders Tab*
Advance Order Queue — Defines the order entry queue in which to automatically place all of your advance orders. If you select ‘Select 00,’ you can choose a queue for each advance order. You may want to define a new queue specifically for advance orders.

Default prep minutes — Defines the default increment for preparation time needed for advance orders. For example, if you type 30 minutes, you can only use increments in 30 minutes, such as 30, 60, 90, and 120 minutes.

Apply Name to Check — Automatically names the check with the description used when you place an advance order.
Labor

Use the Labor group to establish policies and procedures for labor functions that apply to the whole restaurant. The options in the Labor group allow you to define:

- Clock in and clock out requirements for employees using a schedule.
- The use of Edit Punch Reasons.
- The method to approve break returns when an employee clocks in too early.
- Overtime types and calculations.
- Clock in and out rounding times and thresholds.
- Requirements to use third-party electronic payroll settings.
- Break and shift rules to meet certain state labor laws.
- Requirements for contributing and sharing tips in a tip pool, such as the default amount, and attributes to include in the tipshare calculation.

To access the Labor group, select Maintenance > Store Settings. Select Labor from the Group drop-down list.

The Labor group provides the following tabs: Scheduling, Employee Settings, Clock In/Out, Breaks, Electronic Payroll Settings, Shifts, and Labor Policies (only available if using Aloha Labor Scheduler).

Scheduling Tab

Use the Scheduling tab to define scheduling requirements for each employee, such as multiple shift allowances, schedule requirements, and punctuality control features.
Select the Scheduling tab from the Labor group.

**Figure 2-6 Store Settings - Labor Group - Scheduling Tab**

**Allow Employees only One Shift, Per Day** — Restricts all employees from working more than one shift, per day. **Related Options:**
1) To ignore shift requirements for an employee, select ‘Ignore labor schedule’ in Maintenance > Labor > Job Codes > Job Code tab and assign the job code to the employee.
2) To allow an employee to override this restriction in the FOH, select ‘Approve Clock in’ in Maintenance > Labor > Access Levels > Employee tab and assign the access level to the employee.

**Prompt for Manager Password if unscheduled** — Prompts for a manager’s password if an employee attempts to clock in but is not scheduled to work. **Required Option:** You must select ‘Use Clock-In Punctuality’ to operate this feature. **Related Options:**
1) To define the period start date, select a date from the ‘First Day of Week’ drop-down list in Maintenance > Store Settings > System group > Date/Time tab.
2) To ignore shift requirements for an employee, select ‘Ignore labor schedule’ in Maintenance > Labor > Job Codes > Job Code tab and assign the job code to the employee.
3) To allow an employee to override this restriction in the FOH, select ‘Approve Clock in’ in Maintenance > Labor > Access Levels > Employee tab and assign the access level to the employee.
Use Schedule — Activates the punctuality options forces all employees to adhere to schedules created in either the internal Basic Labor Scheduler or the Aloha Labor Scheduler add-on program. Related Options: 1) To ignore shift requirements for an employee, select ‘Ignore labor schedule’ in Maintenance > Labor > Job Codes > Job Code tab and assign the job code to the employee. 2) To allow an employee to override this restriction in the FOH, select ‘Approve Clock in’ in Maintenance > Labor > Access Levels > Employee tab and assign the access level to the employee. Related Requirements: 1) To create a schedule with Basic Labor Scheduler, select Functions > Basic Labor Scheduler. 2) To create a schedule with Aloha Labor Scheduler, refer to the Aloha Labor Scheduler User Guide.

Schedule is Not Required — Specifies that all employees can clock in without manager approval, even if they are not scheduled for the current day. If scheduled, the employee must clock in at the assigned time. Required Option: You must select ‘Use Clock-In Punctuality’ to operate this feature. Related Option: To allow an employee to override this restriction in the FOH, select ‘Approve Clock in’ in Maintenance > Labor > Access Levels > Employee tab and assign the access level to the employee.

Punctuality Options

Use the punctuality group box to define punctuality restrictions on all employees that use a schedule. You must select ‘Use Schedule’ to enable the options in this group box.

Use Clock-In Punctuality — Enforces the scheduled clock-in time for a shift. You must schedule shifts for employees in Aloha Labor Scheduler or Basic Labor Scheduler to use punctuality. Related Option: See related options for ‘Use Schedule.’

Allow Clock-In Early — Specifies the number of minutes before the start of a scheduled shift that an employee is allowed to clock in without manager approval. Type a number from 0 to 99. Related Options: 1) To configure an employee to allow an early clock-in, select ‘Approve Clock In/Out’ in Maintenance > Labor > Access Levels > Employee tab. 2) Also see related options for ‘Use Schedule.’

Allow Clock-In Late — Specifies the number of minutes after the start of a scheduled shift that an employee is allowed to clock in without manager approval. Type a number from 0 to 99. Related Options: 1) To configure an employee to allow a late clock-in, select ‘Approve Clock In/Out’ in Maintenance > Labor > Access Levels > Employee tab. 2) Also see related options for ‘Use Schedule.’
Use Clock-Out Punctuality — Enforces the scheduled clock-out time for a shift. You must schedule shifts for employees in Aloha Labor Scheduler or Basic Labor Scheduler to use punctuality. Related Option: See related options for ‘Use Schedule.’

Allow Clock-Out Late ___ Minutes — Specifies the number of minutes after a shift ends that an employee can clock out before the Manager Approval screen appears. Related Option: 1) To configure an employee to allow a late clockout, select ‘Approve Clock In/Out’ in Maintenance > Labor > Access Levels > Employee tab. 2) See related options for ‘Use Schedule.’

Number of Minutes to Allow Clock In/Out Transaction — Specifies the number of minutes an employee has to clock in or clock out after a manager, or an employee with sufficient access, resets it using the ‘Allow Clock In’ or ‘Allow Clock Out’ buttons on the FOH Employee screen. Type a number from zero to 99. Related Option: See related options for ‘Use Schedule.’

Employee Settings Tab

Use the Employee Settings tab to define miscellaneous employee settings pertaining to labor, such as minimum wage, employee age requirements, time clock settings, enabling edit punch reasons and break return options, and more.

Select the Employee Settings tab from the Labor group.

Figure 2-7  Store Settings - Labor Group - Employee Settings Tab
**Punch edit num prds** — Specifies the maximum number of weeks you can edit in Functions > Edit Punches. Select from one up to four previous weeks. *Related Option:* To define the period start date, select a date from the ‘First Day of Week’ drop-down list in Maintenance > Store Settings > System group > Date/Time tab.

**Employee Minimum Age** — Defines the youngest age that is allowed for employees to work, based on the date of birth of the employee. When you specify an age in this text box, an error appears when you try to add an employee who is too young.

![Error](image)

*Figure 2-8 Employee Too Young Error*

**Min Wage** — Specifies the minimum wage rate for non-tipped employees. Enter a number up to 999,999.99.

**Punch Edit - Limit Jobcodes** — Limits job codes that you can select in Functions > Edit Punches to the job codes defined in the Maintenance > Labor > Job Codes function. If cleared, you can access all job codes.

**Auto Clockout** — Automatically clocks out all employees who are still clocked in at the time the EOD occurs. If an employee has already run a checkout and not clocked out, the system clocks the employee out at the time of the checkout. If an employee has not run a checkout, the system checks them out, and then clocks them out. For non-order entry employees, the system clocks them out at the time of EOD. If you clear ‘Auto Clockout,’ the system discards the shift times for employees who do not clock out before the EOD runs and the shifts do not appear in Edit Punches. *Related Option:* If you select ‘Auto Clockout’ along with ‘24-Hour Operation’ in Maintenance > Store Settings > System group > End Of Day tab, the system clocks employees out at the time the EOD runs, but does not clock them back in for the new business day. If you clear ‘Auto Clockout’ and select ‘24-Hour Operation,’ the system clocks employees out at the time the EOD runs and then clocks them back in for the new business day.

**Can Edit Clock In/Out** — Allows you to edit clock-in and clock-out times with the Edit Clock In button on the FOH Employee screen. *Related Option:* To allow an employee access to the Edit Clock In button, select ‘Labor and Clock Reports’ in Maintenance > Labor > Access Levels > Reports tab, and assign the access level to the employee.
No PTD Hours on Clockout chit — Suppresses the PTD (period to date) hours on the clock out chit. Related Option: To define the period start date, select a date from the ‘First Day of Week’ drop-down list in Maintenance > Store Settings > System group > Date/Time tab.

Use Edit Punch Reasons — Enables you to specify a reason for editing a punch from the BOH and FOH. The reason for each edit appears on the Edit Punches report. Related Requirements: To define an Edit Punch reason, select Maintenance > Labor > Edit Punch Reasons.

Use Alternative Start Break Screen — Replaces the standard FOH Start Break/Clock Out screen with an alternate layout. The Start Unpaid Break and Start Meal Period Break buttons appear on the left side of the screen. The Start Paid Break and Start Rest Period Break buttons appear on the right side of the screen. Using this alternate screen to reduce the risk of an employee touching the wrong break type button; therefore, causing unnecessary punch edits.

Enable Enforcement of Unpaid Break Returns — Activates the enforcement of unpaid break times an employee takes to a set break time frame. If an employee returns from a break too early, a manager can override the enforcement and allow the employee to return to work. Related Options: This setting also enables the ‘Approve Break Return Options’ group box, the ‘Enforce ____ Minute Breaks’ check box in Maintenance > Labor > Job Codes > Job Code tab, and the ‘Approve Unpaid Break Returns’ check box in Maintenance > Labor > Access Levels > Employee tab.

Approve Break Return Options Group Box

Use the Approve Break Return Options group box to allow managers to decide how to handle the extra minutes when an employee returns from an unpaid break too early.

Keep break as an Unpaid Break — Retains the break as unpaid. Select this to display the ‘Keep Break as Unpaid Break’ button on the FOH screen that appears for a manager override.

Convert break into a Paid Break — Changes the unpaid break to a paid break. Select this to display the ‘Convert Break into a Paid Break’ button on the FOH screen that appears for a manager override.

Remove break — Removes the break time. Select this to display the ‘Remove Break’ button on the FOH screen that appears for a manager override.
**Meal Period Break Type Group Box**

Use the Meal Period Break Type group box to allow you to configure the requirements for paid meal period breaks, and determine if meal periods are paid and count toward overtime.

**Unpaid** — Specifies all meal period breaks are unpaid. This is the normal behavior for most jurisdictions.

**Paid and Does Not Count Toward Overtime** — Specifies all meal period breaks are paid but receive regular wage pay when the employee reaches overtime. *Related Option:* The system only includes up to the number of minutes defined in ‘Limit Paid Meal Break Max of ___ Minutes’ in Maintenance > Labor > Job Codes > Job Code tab, when calculating a paid meal period break.

**Paid and Does Count Toward Overtime** — Specifies all meal period breaks are paid and receive overtime wage pay when the employee reaches overtime. *Related Option:* The system only includes up to the number of minutes defined in ‘Limit Paid Meal Break Max of ___ Minutes’ in Maintenance > Labor > Job Codes > Job Code tab, when calculating a paid meal period break.

**Clock In/Out Tab**

Use the Clock In/Out tab to establish labor reporting, overtime calculations, clock in/out settings, and rounding.
Select the Clock In/Out tab from the Labor group.

**Labor Reporting Group Box**

The Labor Reporting group box enables you to define requirements related to labor reporting.

**Clock-In Report Available** — Enables employees to access the Employees on the Clock button on the FOH Reports screen. **Required Option:** You must also select ‘Labor and Clock Reports’ in Maintenance > Labor > Access Levels > Reports tab and assign the access level to the employee.

**Disable Auto Labor Report** — Disables the printing of the clock-in and clock-out chits. Also, labor figures are not included in the Restaurant Sales report for the FOH. This option is used primarily for international operations. **Related Option:** You must select ‘Clock-In Report Available’ to enable this option.

**Labor Report Interval** — Denotes the time interval (in minutes) used for calculating the FOH Labor Report. Labor costs are reported in increments of this interval. **Related Option:** You must select ‘Clock-In Report Available’ to enable this option.

**Print Clock In** — Prints the clock-in chit for each employee.
Overtime Group Box

Use the Overtime group box to define the overtime type, the overtime pay rate, and the number of hours of work required before overtime begins.

**Overtime Type** — Specifies the overtime type as dictated by the company. Select from Weekly Overtime, Daily Overtime, and Extended Daily Overtime. Depending upon the type you select, the applicable hours and multiplier text boxes are available for entry.

**After __ Hrs/Day** — Denotes the number of hours an employee can work per day before going into overtime. The second After __ Hrs/Day text box must be greater than, or equal to, the number of hours in the first text box.

**After __ Hrs/Week** — Denotes the number of hours an employee can work per week before going into overtime. This is typically set to 40.

**After __ Hrs/7th Day** — Denotes the number of hours an employee can work on the 7th consecutive day worked before going into overtime, if applicable. The second After __ Hrs/7th Day text box must be greater than or equal to the number of hours in the first text box. Employees receive overtime pay for the 7th consecutive day worked, regardless of the number of hours worked that same week. After a defined number of hours are worked on the 7th consecutive day, employees can receive additional overtime pay.

For example, an employee who worked five hours a day for seven days, and using 1.5 as the overtime multiplier rate, the overtime calculates as follows:

<table>
<thead>
<tr>
<th>Number of Hours</th>
<th>Rate of Pay</th>
<th>Overtime Rate</th>
<th>Total Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>30.0 hours</td>
<td>$5.00</td>
<td></td>
<td>$150.00</td>
</tr>
<tr>
<td>5.0 hours</td>
<td>$7.50</td>
<td>1.5</td>
<td>$37.50</td>
</tr>
</tbody>
</table>

If that same employee worked 10 hours on the 7th consecutive day worked, using 2.0 as the additional overtime multiplier rate, the overtime calculates as follows:

<table>
<thead>
<tr>
<th>Number of Hours</th>
<th>Rate of Pay</th>
<th>Overtime Rate</th>
<th>Total Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>30.0 hours</td>
<td>$5.00</td>
<td></td>
<td>$150.00</td>
</tr>
<tr>
<td>8.0 hours</td>
<td>$7.50</td>
<td>1.5</td>
<td>$60.00</td>
</tr>
<tr>
<td>2.0 hours</td>
<td>$10.00</td>
<td>2.0</td>
<td>$20.00</td>
</tr>
</tbody>
</table>
**Mult** — Specifies the multiplier rate used by the system when an employee’s hours exceed the hours per day and/or the hours per week limits. Typically, the rate is 1.5.

**Overtime Calculation Group Box**

The Overtime Calculation group box determines the calculation to use for overtime pay.

**Calculate overtime by average rate** — Calculates overtime pay by the total pay earned for all shifts worked during the current pay period, divided by the employee’s total hours worked for all shifts during the current pay period.

**Calculate overtime by shift rate** — Calculates employee’s overtime pay by the shift rate of the job code the employee is logged in as when overtime begins accumulating.

**Other Options on the Clock In/Out Tab**

**Round clock-in times** — Specifies the number of minutes to use for rounding clock-in times. When employees clock in, the system rounds the time according to the number entered in this text box. For example, if you enter ‘5,’ and the employee clocks in at 7:58, the system rounds the time to the nearest 5-minute interval, which is 8:00. Type a number from 0 to 60, with 0 to indicate no rounding.

**Clock-in round threshold** — Specifies the number of minutes at which the system rounds the clock in time. Type a number from 0 to 60, and the number must be less than the ‘clock-in round’ time. If set to 0, the system automatically rounds to the nearest time interval listed in ‘Round clock in times.’

**Round clock-out times** — Specifies the number of minutes in which to round clock out times. When employees clock out, the time is rounded according to the number entered in this text box. For example, if you enter ‘5,’ and the employee clocks out at 7:58, the system rounds the time to the nearest 5-minute interval, which is 8:00. Type a number from 0 to 60, with 0 to indicate no rounding.

**Clock-out round threshold** — Specifies the number of minutes at which the system rounds the clock out time. Type a number from 0 to 60, and the number must be less than the ‘clock-out round’ time. If set to 0, the system automatically rounds to the nearest time interval listed in ‘Round clock out times.’
Breaks Tab

Use the Breaks tab to enable meal period and rest period break rules and set the parameters for those rules. If all criteria is met according to the parameters, the system automatically generates a pay record in Other Wages when End-of-Day is run. This record is identifiable as system-generated and can either be accepted or deleted when the Other Wages section is reviewed by the manager. The system generated records for breaks are:

- Rest Period Premium
- Meal Period 1 Consent
- Meal Period 1 Mandatory
- Meal Period 2 Consent
- Meal Period 2 Mandatory

‘Meal Period 1’ refers to the period you designate for a typical meal period during the first shift of a work day. ‘Meal Period 2’ refers to a meal period typically worked on a second shift or extended work day, based on pre-defined parameters set in the system. ‘Consent’ refers to rules for meal periods that may be waived when, for example, the employee’s work day will be completed in less than a pre-defined and mutually agreed upon time. ‘Mandatory’ refers to rules that require mandatory pay for meal periods because maximum requirements are met.
Select the Breaks tab from the Labor group.

![Figure 2-10 Store Settings - Labor Group - Breaks Tab](image)

**Use Break Rules** — Enables you to specify the parameters to apply to break rules.

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**CAUTION**

*Check the wage and payday laws for your state to ensure your policies and procedures are in compliance.*

---

**Require Manager to Clock Out Penalty Pay** — Forces the manager to clock out an employee who has not waived their meal period break for the day and earned penalty pay. In accordance to the shift and break rules, a manager must clock them out.
The following table shows examples of results generated by the criteria for penalty pay:

<table>
<thead>
<tr>
<th>Scenario:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob was scheduled for 4.50 hours, and he worked 3.25 hours</td>
<td>Bob clocked out normally because he did not work enough to take a break and did not earn penalty pay.</td>
</tr>
<tr>
<td>Bob was scheduled for 4.50 hours, and he worked 6.25 hours, and he did not take a rest period break.</td>
<td>Bob earned penalty pay and a manager was required to clock him out.</td>
</tr>
<tr>
<td>Bob was scheduled for 4.50 hours, and he worked 6.25 hours, and he took a rest period break.</td>
<td>Bob clocked out normally, because he met the break rule requirements and did not earn penalty pay.</td>
</tr>
<tr>
<td>Bob was scheduled to work 5.50 hours, and he worked 5.25 hours, and he did not waive his meal period break at clock in.</td>
<td>Bob earned consensual penalty pay and a manager was required to clock him out.</td>
</tr>
<tr>
<td>Bob was scheduled to work 5.50 hours, and he worked 5.25 hours. He waived his meal period break at clock in and took his allotted rest breaks.</td>
<td>Bob clocked out normally because he waived his consensual penalty pay at clock in and met the break rule requirements.</td>
</tr>
<tr>
<td>Bob was scheduled to work 5.50 hours, and he worked 5.25 hours. He waived his meal period break at clock in; however, he did not take his allotted rest period breaks.</td>
<td>Bob earned consensual and mandatory penalty pay and a manager was required to clock him out.</td>
</tr>
<tr>
<td>Bob was scheduled to work 5.50 hours, and he worked 7.00 hours.</td>
<td>Bob earned mandatory penalty pay regardless if he waived his meal break, and a manager was required to clock him out.</td>
</tr>
<tr>
<td>Bob was scheduled for 11.00 hours, and he worked 10.50 hours. He waived his meal period break at clock in; however, he did not take only one or none of his allotted rest period breaks.</td>
<td>Bob earned mandatory penalty pay and a manager was required to clock him out.</td>
</tr>
<tr>
<td>Bob was scheduled for 11.00 hours, and he worked 10.50 hours. He waived his meal period break at clock in; and took all his allotted rest and meal period breaks.</td>
<td>Bob clocked out normally because he waived his consensual penalty pay at clock in and met the break rule requirements.</td>
</tr>
</tbody>
</table>
Rest Periods Group Box

Use the Rest Periods group box to define the rule to use for paying and requiring rest period breaks for employees.

**Rest Period net rest time minute(s)** — Represents number of minutes of net rest time per set number of hours worked. A valid range is 1 to 59.

**Rest Period hour(s) worked** — Represents number of hours worked as basis for set number of rest time minutes. A valid range is 1.00 to 24.00.

**Rest Period pay hours** — Represents the number of hours added as Other Wages if the employee is furnished less than set number of minutes of rest period per set number of hours worked. A valid range is 1.00 to 24.00.

**Rest Period pay rate** — Represents the rate of pay if employee does not receive rest period break. The default is the regular rate of pay. Minimum wage is an option.

---

To set the the minimum wage rate for employees, type the rate in the ‘Min Wage’ text box in Maintenance > Store Settings > Labor group > Employee Settings tab.

---

**Rest Period total work time** — Represents minimum total work time required to receive a rest period break. A valid range is 1.00 to 24.00.
The following table shows examples of results generated by the criteria you may set for rest peri-
ods:

<table>
<thead>
<tr>
<th>Criteria:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 minute net rest time for every 4 hours worked, 1 hour paid at Regular rate, unless shift ends at less than 3.5 hours.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Scenario:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob works 3.25 hours.</td>
<td>Bob gets paid actual hours worked.</td>
</tr>
<tr>
<td>Bob works 3.75 hours.</td>
<td>Bob gets paid actual hours worked plus 1 hour of Rest Period bonus at the regular rate, since he was not given a Rest Period break. The system generates an Other Wages entry as “System-Rest Period Premium.”</td>
</tr>
<tr>
<td>Bob works 4.00 hours.</td>
<td>Bob gets paid actual hours worked plus 1 hour of Rest Period bonus at the regular rate, since he was not given a Rest Period break. The system generates an Other Wages entry as “System-Rest Period Premium.”</td>
</tr>
</tbody>
</table>

**Meal Periods Group Box**

The meal period rule enables you to pay the employee for a first and/or second meal period, when the defined criteria is met.

**Meal period work hours** — Represents the minimum number of hour(s) required to work before a meal break. If the employee works more than this set number of hours without a first meal period break of a set number of minutes, add additional hour(s) as Other Wages. A valid range is 1.00 to 24.00.

**Meal period break length** — Represents the length of the first meal period break in minutes for a set number of hours worked. A valid range is from 1.00 to 24.00.

**Meal period pay hour(s)** — Represents the number of hour(s) entered as Other Wages if the employee works more than a set number of hours without a first meal period break for a set number of minutes. A valid range is 1.00 to 24.00.

**Meal period pay rate** — Represents the rate of pay if the employee does not receive first meal period break. The default is the regular rate of pay. Minimum wage is an option.
Add as ‘Consent’ wage type — Represents the maximum number of hour(s) worked before meal pay is mandatory. If the employee’s total work hours are less than or equal to this number of hours, post the hour(s) as a ‘consent’ type of wage in Other Wages. A valid range is 1.00 to 24.00.

The following table shows examples of results generated by the criteria you may set for first meal periods:

<table>
<thead>
<tr>
<th>Criteria:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee works more than 5 hours without a 30 minute meal break, pay 1 hour at regular rate. If total contiguous paid hours are less than 6 hours, extra pay can be waived.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Scenario:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob works 4.75 hours without a meal break.</td>
<td>Bob gets paid actual hours worked only.</td>
</tr>
<tr>
<td>Bob works 5 hours without a meal break.</td>
<td>Bob gets paid actual hours worked plus 1 hour of Meal Period pay. The system generates an Other Wages entry as “System-Meal Period 1 Consent.”</td>
</tr>
<tr>
<td>Bob works 6.00 hours without a meal break.</td>
<td>Bob gets paid actual hours worked plus 1 hour of Meal Period pay. The system generates an Other Wages entry as “System-Meal Period 1 Consent.”</td>
</tr>
</tbody>
</table>

In the table, employee and employer can mutually consent to waive the first meal period, if the employee’s work period of not more than six hours will complete his day’s work.

Second Meal Period

Meal period work hour(s) — Represents the minimum number of hour(s) required to work before a second meal break. If the employee works more than this set number of hours without a second meal period break of a set number of minutes, add additional hour(s) as Other Wages. A valid range is 1.00 to 24.00.

Meal period break length — Represents the length of the second meal period break in minutes for a set number of hours worked. A valid range is 30 to 59.

Meal period pay hour(s) — Represents the number of hour(s) entered as Other Wages if the employee works more than a set number of hours without a second meal period break for a set number of minutes. A valid range is 1.00 to 24.00.
**Meal period pay rate** — Represents the rate of pay if the employee does not receive a second meal period break. The default is the regular rate of pay. Minimum wage is an option.

**Add as ‘Consent’ wage type** — Represents the maximum number of hour(s) to work before meal pay is mandatory. If employee’s total work hours are less than or equal to this number of hours, post the hour(s) as a ‘consent’ type of wage in Other Wages. A valid range is 1.00 to 24.00.

The following table shows examples of results generated by the criteria set for *second* meal periods:

<table>
<thead>
<tr>
<th>Criteria:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee works more than 10 hours without a <em>second</em> 30 minute meal break, pay 1 hour at <strong>regular</strong> rate. If the total contiguous paid hours are less than 12 hours, extra pay can be waived.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Scenario:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob works 9.5 hours without a meal break.</td>
<td>Bob gets paid actual hours worked plus 1 hour of Meal Period 1 pay. The system generates an Other Wages entry as ‘System-Meal Period 1 Mandatory.’</td>
</tr>
<tr>
<td>Bob works 11.5 hours.</td>
<td>Bob gets paid actual hours worked plus 1 hour of Meal Period 1 pay plus one hour of Meal Period 2 pay. The system generates an Other Wages entry as ‘System-Meal Period 1 Mandatory’ and another as ‘System-Meal Period 2 Consent.’</td>
</tr>
<tr>
<td>Bob works 4.75 hours, takes a meal break, then works 4.75 hours without a second meal break.</td>
<td>Bob gets paid actual hours worked only.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Scenario:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob works 4.75 hours, takes a meal break, then works 6.0 hours.</td>
<td>Bob gets paid actual hours worked plus 1 hour of Meal Period 2 pay. The system generates an Other Wages entry as ‘System-Meal Period 2 Consent.’</td>
</tr>
</tbody>
</table>
Electronic Payroll Settings Tab

Use the Electronic Payroll tab to create a file for third party software to read and process for payroll processing, such as ADP and Paychex.

Select the Electronic Payroll Settings tab from the Labor group.

ADP Group Box

The ADP group box contains the options applicable to ADP payroll processing only.

Use ADP — Specifies ADP as the third party payroll processor you are using.

ADP Company # — Represents the three-digit ADP company number. You must obtain this number from ADP.

ADP Store # — Represents the ADP store number. You must obtain this number from ADP, and the store number is for use by chain operations only.

ADP Version # — Represents the ADP software version number. You must obtain this number from ADP.
Omit Credit Card Tips — Eliminates credit card tips from the ADP export file.

Omit Control Totals — For early versions of ADP software that do not support these options.

Don’t output primary rate or jobcode — Excludes pay rates and job codes from the export file.

Output sales as whole dollars — Discloses sales in rounded, whole dollar amounts, rather than exact dollar and cent amounts.

Output Cash Tips — Includes cash tips in the ADP export file.

**PayUSA Group Box**

The PayUSA group box contains the options applicable to PayUSA payroll processing only.

Use PayUSA — Specifies PayUSA as the third party payroll processor you are using.

Pay Period Days — Represents the number of days in a PayUSA pay period. PayUSA currently requires this number be either seven or 14.

Company Code — Represents the assigned company code obtained from PayUSA.

**Paychex Group Box**

The Paychex group box contains the options applicable to Paychex payroll processing only. The Paychex export file lists each job an employee works in a specified pay period. The job code ID identifies the jobs worked by an employee. The hours worked for each job code is summarized. For example, the regular hours and overtime hours are calculated by job code, then displayed as
one record for each job worked during the pay period. The export file displays as a comma-delimited text file. The following table indicates the fields included in the export order. They are listed in the order in which they exist in the file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Import Size</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Number</td>
<td>1 - 9999</td>
<td>Uses the Export ID on Employee Maintenance</td>
</tr>
<tr>
<td>Department Number</td>
<td>1 - 9999</td>
<td>Uses the Job Code ID for the job that the employee worked.</td>
</tr>
<tr>
<td>Regular Hours</td>
<td>-999.99 - 999.99</td>
<td>Summary of regular hours worked for this Job Code ID.</td>
</tr>
<tr>
<td>Overtime Hours</td>
<td>-999.99 - 999.99</td>
<td>Summary of overtime hours worked for this Job Code ID.</td>
</tr>
<tr>
<td>Pay Rate</td>
<td>0 - 999.999</td>
<td>The pay rate for this Job Code ID.</td>
</tr>
<tr>
<td>Credit Card Tips</td>
<td>-9999.99 - 9999.99</td>
<td>Total credit card tips for this Job Code ID.</td>
</tr>
<tr>
<td>Declared Cash Tips</td>
<td>-9999.99 - 9999.99</td>
<td>Total cash tips declared for this Job Code ID.</td>
</tr>
<tr>
<td>Gross Wages</td>
<td>-999999.99 - 999999.99</td>
<td>Total pay for this Job Code ID.</td>
</tr>
</tbody>
</table>

**Use Paychex** — Specifies Paychex as the third party payroll processor you are using. **Related Option:** You must define an export ID for each employee in the ‘Export ID’ option in Maintenance > Labor > Employees > Employee tab to export employee data with Paychex.

**Pay Period Days** — Specifies the number of days in a Paychex pay period. Currently, PayUSA requires either seven or 14.

**Paychex Branch #** — Represents the Paychex branch number. This is a number from zero - 999. Use leading zeros if the branch number is less than three digits long.

**Paychex Client #** — Represents the four-digit (0 - 9999) Paychex client number.

**Paychex Sitecode** — Represents the single-character Paychex site code. The site code is a code assigned to each location from which Paychex payroll data is exported.

**Other Options on the Electronic Payroll Settings Tab**

**Use RealWorld Payroll** — Specifies RealWorld Payroll as the third party payroll processor you are using.
Use Payroll One — Specifies Payroll One as the third party payroll processor you are using.

Shifts Tab

Use the Shifts tab to enable and set parameters for split shift and shift pay rules. If all criteria is met, the system automatically generates a pay record in Other Wages when End-of-Day is run. This record is identifiable as system-generated and can either be accepted or deleted when the Other Wages section is reviewed by the manager. The system generated records for shifts are:

- Split Shift Premium
- Worked < half scheduled
- No Schedule minimum
- 2nd Shift minimum

In the examples, employee and employer can mutually consent to waive the second meal period, if the employee’s work period of not more than twelve hours completes his day’s work. Meal Period 1 rules apply and are mandatory because total continuous hours in all instances exceed the threshold of six hours.

Select the Shifts tab from the Labor group.

Figure 2-12 Store Settings - Labor Group - Shifts Tab
Use Shift Rules — Enables you to specify the parameters to apply to the shift rules.

Check the wage and payday laws for your state to ensure your policies and procedures are in compliance.

Split Shifts Group Box

Use the Split Shifts group box to define the rule for split shifts and paying an additional wage if an employee works a split shift. A split shift is recognized as two clock in/clock outs in one work day. The references to ‘1st reporting’ and ‘2nd reporting’ that follow refer to an employee’s 1st shift and 2nd shift.

Split Shift hour(s) — Represents the number of hours added as Other Wages if the employee has worked one shift and works a second shift in one work day. Valid entries are from 1.00 to 24.00.

Split Shift pay rate — Represents the rate of pay if the employee works a split shift. Minimum wage is an option. If the ‘regular pay’ option is selected, the rate will be for the job worked on the first shift.

You can set the minimum wage rate in Store Settings > Labor group > Employee Settings tab.

The following table shows examples of results generated by criteria you may set for split shifts:

<table>
<thead>
<tr>
<th>Criteria:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay 1 hour at <strong>minimum pay</strong> rate.</td>
<td>Bob is paid 3 hours times $10, plus 2 hours times $6, plus 1 hour times minimum wage. The extra hour pay does not count toward overtime. The system generates an Other Wages entry as ‘System-Split Shift Premium.’</td>
</tr>
</tbody>
</table>

Bob works 1st shift for 3 hours as a cook at $10 hour, and 2nd shift for 2 hours as a dishwasher for $6 an hour.
The first shift reporting rule is that if an employee works less than half the scheduled hours, the employee is paid additionally for half the scheduled hours at the regular rate of pay. When this condition is met, the system generates an Other Wages entry with the wage type ‘System - Worked < half scheduled.’

### Criteria:

- **Pay 1 hour at** regular **pay rate.**

### Scenario:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob works 1st shift for 3 hours as a cook at $10 hour, and 2nd shift for 2 hours as a dishwasher for $6 an hour.</td>
<td>Bob is paid 3 hours times $10, plus 2 hours times $6, plus 1 hour times $10.00, since his regular pay for 1st shift is $10.00. The extra hour pay does not count toward overtime. The system generates an Other Wages entry as ‘System-Split Shift Premium.’</td>
</tr>
</tbody>
</table>

### Shift TimePay - 1st Shift Reporting (Shift Scheduled) Group Box

The first shift reporting rule is that if an employee works less than half the scheduled hours, the employee is paid additionally for half the scheduled hours at the regular rate of pay. When this condition is met, the system generates an Other Wages entry with the wage type ‘System - Worked < half scheduled.’

The system has only one option to calculate whether an employee has worked at least half of the scheduled hours. You must select ‘Use Schedule’ in Maintenance > Store Settings > Labor group > Scheduling tab.

### Pay at least hours —

Represents the **minimum** number of hour(s) to add as Other Wages if the employee works less than half their scheduled hours on first reporting. A valid range is 1.00 to 24.00.

### No more than hours —

Represents the **maximum** number of hours to add as Other Wages if the employee works less than half their scheduled hours on first reporting. A valid range is from 1.00 to 24.00, but this value cannot be less than the minimum value.

### Pay Rate —

Represents the rate at which the employee is paid. The default value is regular pay. Minimum wage is an option.
The following table shows examples of results generated by criteria you may set for split first shifts:

<table>
<thead>
<tr>
<th>Criteria:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pay 2 hours <strong>minimum</strong> and 4 hours <strong>maximum</strong> at <strong>regular</strong> pay rate.</td>
</tr>
<tr>
<td><strong>Scenario:</strong></td>
</tr>
<tr>
<td>Bob is scheduled to work 4 hours, but works 3.</td>
</tr>
<tr>
<td>Result:</td>
</tr>
<tr>
<td>Bob is paid for his actual hours worked, since he worked more than half his scheduled shift.</td>
</tr>
<tr>
<td>Bob is scheduled to work 6 hours, but works 2.5.</td>
</tr>
<tr>
<td>Bob is paid for his actual hours worked, plus 3 additional hours, for a total of 5.5 hours. The 3 hours is due to the</td>
</tr>
<tr>
<td>fact that he was scheduled for 6, half of which is 3. He received the 3 since he did not work at least that many. The</td>
</tr>
<tr>
<td>system generates an Other Wages entry as ‘System Worked &lt; half scheduled.’</td>
</tr>
<tr>
<td>Bob is scheduled to work 4 hours, but works 1.75.</td>
</tr>
<tr>
<td>Bob is paid for his actual hours worked, plus 2 hours for working less than half his scheduled shift, for a total of 3.75</td>
</tr>
<tr>
<td>hours. The system generates an Other Wages entry as ‘System Worked &lt; half scheduled.’</td>
</tr>
</tbody>
</table>

**Shift TimePay - Shift Not Scheduled**

Use the Shift TimePay - Shift Not Scheduled group box to define the rule for when the shift is not scheduled.

**Minimum hours** — Represents the minimum hour(s) to pay if the employee is not scheduled to work. A valid range is 1.00 to 24.00.
The following table shows examples of results generated by criteria you may set for split shifts:

<table>
<thead>
<tr>
<th>Criteria:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>System is set to pay 2 hours <strong>minimum</strong>, 4 hours <strong>maximum</strong> at <strong>regular</strong> pay rate, but the employee does <strong>not have a schedule</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Scenario:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob is not scheduled and works 4 hours.</td>
<td>Bob is paid 4 hours at the job code rate.</td>
</tr>
<tr>
<td>Bob is not scheduled and works 6 hours.</td>
<td>Bob is paid 6 hours at the job code rate.</td>
</tr>
<tr>
<td>Bob is not scheduled and works 3 hours.</td>
<td>Bob will be paid 3 hours at the job code rate, plus 2 additional system generated hours at the job code rate. The system generates an Other Wages entry as ‘System-No schedule minimum.’</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Criteria:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>System is set to pay 2 hours <strong>minimum</strong>, 4 hours <strong>maximum</strong> at <strong>minimum wage</strong>, but the employee does <strong>not have a schedule</strong>.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Scenario:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bob is not scheduled and works 4 hours.</td>
<td>Bob is paid 4 hours at the job code rate.</td>
</tr>
<tr>
<td>Bob is not scheduled and works 6 hours.</td>
<td>Bob is paid 6 hours at the job code rate.</td>
</tr>
<tr>
<td>Bob is not scheduled and works 3 hours.</td>
<td>Bob will be paid 3 hours at the job code rate, plus 2 additional system generated hours at the minimum wage rate. The system generates an Other Wages entry as ‘System-No schedule minimum.’</td>
</tr>
</tbody>
</table>

**Shift TimePay - 2nd Shift Reporting Group Box**

Use the Shift TimePay - 2nd Shift Reporting group box to define the rule if an employee reports to work for a second shift of a day and works less than a pre-defined amount of hours, the employee should be paid a pre-defined amount of hours at the regular rate of pay or minimum wage. This rule does not rely on the ‘Use Schedule’ check box, but rather checks clock ins and clock outs within a work day. When conditions are met, the system generates an Other Wages entry with the wage type ‘System - 2nd Shift minimum.’
**Works less than hours** — Represents the threshold number of hours the employee must work less than on second shift to be eligible for additional pay. A valid range is 1.00 to 24.00.

**Reporting pay hours** — Represents the number of hours to add to Other Wages if the employee works less than the threshold hours on second shift. A valid range is 1.00 to 24.00.

**Reporting pay rate** — Represents the rate of pay for additional hours if employee is not furnished the set number of hours on his second shift. The default is the regular rate of pay. Minimum wage is an option.

The following table shows examples of results generated by criteria you may set for split second shifts:

<table>
<thead>
<tr>
<th>Criteria:</th>
<th>Scenario:</th>
<th>Result:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee works second shift less than 2 hours. Pay 2 hours at minimum pay rate or regular rate.</td>
<td>Bob returns for his second shift. He clocks in and is immediately sent home.</td>
<td>Bob gets paid actual time worked plus 2 hours either minimum wage or regular rate. The system generates an Other Wages entry as 'System- 2nd Shift minimum.'</td>
</tr>
<tr>
<td></td>
<td>Bob returns for his second shift. He works 1.5 hours and is sent home.</td>
<td>Bob gets paid the 1.5 hours he worked plus 2 hours at either minimum wage or his regular rate. The system generates an Other Wages entry as 'System- 2nd Shift minimum.'</td>
</tr>
<tr>
<td></td>
<td>Bob returns for his second shift. He works 3 hours and is sent home.</td>
<td>Bob gets paid his actual hours worked only since he worked more than the threshold.</td>
</tr>
</tbody>
</table>

**Labor Policies Tab**

This tab appears if you are using Aloha Labor Scheduler.

Financials

Use the Financials group to establish policies and procedures for financial aspects of your business that apply to the whole restaurant. The options in the Financials group allow you to define:

- Secondary tax and surcharge requirements.
- Report requirements, such as if net sales includes comps or promotions, if gross sales includes voided sales, and the minimum tip percentage all employees must tip.
- Prompts to remind the cashier to make cash drops.
- The method in which you can search house accounts.
- Either a flat or a percentage charge to apply to the guest check.

To access the Financials group, select Maintenance > Store Settings. Select Financials from the Group drop-down list. The Taxes & Surcharges tab appears as the default tab.

The Financials group provides the following tabs: Taxes & Surcharges, Reports, Banks, House Accounts, and Add Charges.

Taxes & Surcharges Tab

Use the Taxes & Surcharges tab to enable and define requirements for secondary taxes, and surcharges.
Select the Taxes & Surcharges tab from the Financials group.

**Figure 2-13** Store Settings - Financials Group - Taxes & Surcharges Tab

**Tax Settings Group Box**

Use the Tax Settings group box to enable the use of secondary taxes.

**Use Secondary Taxes** — Enables the use of secondary taxes by the system. Related Requirements: 1) To use secondary taxes, you must define them in Maintenance > Menu > Taxes, and assign the tax to an item in Maintenance > Menu > Items > Item tab. 2) To apply secondary taxes to comps, select ‘Tax Comp Amount’ in Maintenance > Payments > Comps > Taxes tab. 3) To apply secondary taxes to promotions, select ‘Tax Comp Amount’ in Maintenance > Payments > Promotions > Taxes tab.

**Exclude Inclusive Tax from Secondary Tax** — Calculates the secondary tax using the base price of the item, not the price after adding the exclusive tax.

**Enable Surcharges Group Box**

Use the Enable Surcharges group box to enable the use and requirements for surcharges.
**Enable Surcharges** — Activates surcharges in the system and applies them to the designated menu items. *Related Requirement:* To define surcharges, select Maintenance > Menu > Surcharges and assign the surcharge to an item in Maintenance > Menu > Items > Item tab. *Related Options:* 1) To apply surcharges to comps, select ‘Surcharge Comp Amount’ in Maintenance > Payments > Comps > Taxes tab. 2) To apply surcharges to promotions, select ‘Surcharges Comp Amount’ in Maintenance > Payments > Promotions > Taxes tab.

**Surcharge Text** — Specifies the text to display on guest checks when ‘Enable Surcharges’ is selected. If cleared, the surcharge text displays as ‘Surcharge 1,’ ‘Surcharge 2,’ etc.

**Guest Always Pays Surcharge** — Applies surcharges to designated menu items and includes them on guest checks. *Related Option:* This option disables the ‘Use Smart Surcharges’ option.

**Use Smart Surcharges** — Indicates smart surcharges are in use. *Related Option:* This option disables the ‘Guest Always Pays Surcharge’ option.

**List all Surcharges as a single Surcharge** — Combines all surcharges into a single entry on guest checks. If cleared, surcharges are listed separately each time they are applied.

**Apply Surcharge to Zero Priced Items** — Includes zero priced items in surcharge calculations.

**Apply Surcharge to Void Items** — Includes voided items in surcharge calculations.

**Apply Surcharge to Discount Items** — Includes comps and promotions in surcharge calculations.

**Reports Tab**

Use the Reports tab to define requirements for reports, such as including comps or promos in net sales, displaying the Clock In and Clockout values in minutes and hundredths, omitting voids in gross sales, and defining the tip percent threshold.
Select the Reports tab from the Financials group.

![Figure 2-14 Store Settings - Financials Group - Reports Tab](image)

**Include Comps In Net Sales** — Includes comp sales in the net sales amount.

**Include Promos In Net Sales** — Includes promo sales in the net sales amount.

**Exclude Open Sales from BOH Reports** — Excludes sales from currently opened check from calculations of BOH reports. Only sales that are finalized are included in the reports.

**Exclude Comped Checks and Guests** — Does not include checks in which a comp took the amount to $0.00, when calculating check and guest counts totals.

**Include Zero Priced Items On FOH Pmix Rpt** — Does not include items with a $0.00 price on the FOH Product Mix report.

**Display FOH Labor Hours in Minutes** — Controls display of hours and minutes on FOH reports for Clock In/Out Times and the Labor report. If cleared, the hours display in a decimal, or hundredths, format.
**Display clock in/clock out chit in minutes and hundredths** — Controls display of hours and minutes on the clock in/clock out chit. If cleared, the times display in hours and minutes, or HH:MM. If selected, times and totals print in the HH:MM format and in hundredths, or decimals.

**Report Non-cash Tenders by Term Revenue Center** — Always reports non-cash payments to revenue centers attached to the terminal, even if you have attached a revenue center by an order mode or by a table.

**Tip Breakdown Prints on Clock Out Chit** — Prints a tip breakdown section, such as the tip rate%, total charge sales and tip rate, total cash tips and tip rate, and more, at the bottom of the clock out chit. **Related Option:** The tip breakdown appears on the clock out chit for all employees clocked in with an access level with ‘Order Entry’ selected.

**Clock Out Chit Footer** — Prints a defined guest check message as a footer at the bottom of the clock out chit. Select ‘00000 None’ to disable the feature. **Related Option:** To define a footer message, create a messages in Maintenance > Messages > Guest Checks.

**Gross Sales do Not Include Voids** — Configures all gross sales calculations on reports to include voids.

**Tip% Threshold:** — Specifies the percentage to use when determining if an employee’s declared tips are too low. The employee receives only one chance to enter their declared tips at the right percentage. If the amount is too low, a warning message displays. If the wrong amount is accepted, the manager must delete the employee’s clock out to enable them to try again. **Related Option:** This option specifies the percentage use for the ‘Global Percentage’ tip threshold type in Maintenance > Labor > Job Codes > Job Codes.

**Drawer Checkout Group Box**

Use the Drawer Checkout group box to separate the cashier activity into distinct transaction types. You can specify whether you want the report to display just summary totals, or more detailed information for these transaction types.

**Totals Only** — Displays summarized totals for each transaction type. For example, if you select this option, the Sales transaction type displays a combined total for all sales, rather than a separate total for each sales category (e.g., food, beverage, and so on).
List All — Displays detailed totals for each transaction type, broken out by transaction IDs. For example, if you select this option, the Sales transaction type displays a separate total for each sales transaction ID, or category (e.g., food, beverage, and so on). This option displays all transaction IDs for each transaction type. If no activity occurred for a given transaction ID, the report still displays a line item for the transaction ID, with a zero next to the transaction ID.

List All with Values — Displays detailed totals for each transaction type, broken out by transaction IDs. For example, if you select this option, the Sales transaction type displays a separate total for each sales transaction ID, or category (e.g., food, beverage, and so on). If no activity occurred for a given transaction ID, the report does not display a line item for the transaction ID.

Print Sales Section — Prints the Sales section at the bottom of the Drawer Checkout report. The Sales section contains sales transactions for checks closed to this cash drawer, and provides you with information you can use for comparison balancing.

Drawer Checkouts show payments where — Specifies the method used to report at which drawer a payment appears. This is useful in a multiple drawer environment.

- **Check Closed** reports payments at the drawer from which you closed the check.
- **Payment Adjusted** reports payments at the drawer from which you last adjusted a payment.

**Banks Tab**

Use the Banks tab to define cash drop thresholds to prompt the cashier when it is time to pull money from the drawer and place it in the safe. This is sometimes called a ‘drop,’ or ‘cash pull,’ or ‘raking the tills.’ You set the amount you want them to drop for the initial prompt and subsequent prompts. The system checks at log in and after a tender is applied. If the criteria is met, a message displays at this time. These do not force the cashier to do the drop. You also set the amount at which a drop is required. At this point, the cashier has to select a cash drawer function and perform a drop.
Select the Banks tab from the Financials group.

Depositable Tenders Group Box

Use the Depositable Tenders group box to set up the automatic transfer of deposits from reconciliation amounts and system prompts to remind you to perform cash drops.

# of Description Fields — Specifies whether to display one or two prompts for a deposit description. When you select ‘1’ from the drop-down list, only the ‘Field 1 Text’ option is enabled. When you select ‘2’ from the drop-down list, both the ‘Field 1 Text’ and ‘Field 2 Text’ options are enabled.

Field 1 Text — Denotes the first text string to appear on the FOH deposit declaration screen and the Edit Deposit Entry dialog box in Functions > Edit Deposits. **Required Option:** You must select at least ‘1’ or ‘2’ from the ‘# of Description Fields’ drop-down list to enable this option.

Field 2 Text — Denotes the second text string to appear on the FOH deposit declaration screen and the Edit Deposit Entry dialog box in Functions > Edit Deposits. **Required Option:** You must select at least ‘2’ from the ‘# of Description Fields’ drop-down list to enable this option.
Length — Specifies the number of characters, up to 30, you can add for the corresponding description.

Numeric — Specifies whether you must enter numbers only for the corresponding description.

Required — Specifies the description is a required entry when making a deposit.

Max per Deposit — Specifies the maximum amount you can enter for a deposit, up to $99999.99. When the reconciled amount exceeds the maximum amount, the deposits are broken out separately.

Create Deposit from Declared Tenders — Enables you to automatically transfer the reconciled amount to a deposit. Required Options: If you are using Employee Reconciliation, you must select ‘Must Declare at Checkout’ in Maintenance > Labor > Job Codes > Functions tab. 2) If you are using Drawer Reconciliation, you must select ‘Perform Drawer Reconciliation’ in Maintenance > Hardware > Cash Drawers. 3) This option enables the ‘Always display Deposit Distribution Screen’ option on the same tab.

Always display Deposit Distribution Screen — Displays the Distribution screen, at all times, after you perform a reconciliation. This allows you to add and edit deposits, regardless of the maximum deposit amount setting. Required Option: You must select ‘Create Deposit from Declared Tenders’ to enable this setting.

Other Options on the Banks Tab

Initial Prompt for Cash Drop at — Designates the amount that must be in the drawer to initiate the first message prompt for a cash drop. Once the dollar amount of cash owed reaches this amount for the first time in a shift, the system prompts the employee to perform a cash drop. They can either perform a drop or continue operating without a drop until the amount in the drawer reaches the specified amount for a subsequent prompt.

Subsequent Prompts for Cash Drop Every — Determines the amount that must be in the drawer to display subsequent message prompts for a cash drop. This number must be greater than the number entered in the ‘Initial Prompt for Cash Drop’ text box.

Required Cash Drop at — Designates the amount that must be in the drawer to display a message prompt for a required cash drop. When the amount of cash in the drawer reaches this amount, the employee cannot continue operations until they make a drop. This number must be greater than the numbers entered in the ‘Initial Prompt for Cash Drop’ and ‘Subsequent Prompts for Cash Drop Every’ text boxes.
House Accounts Tab

Use the House Accounts tab to specify how the system searches for house accounts. Select the House Accounts tab from the Financials group.

House Account Lookup Method Group Box

Use the House Account Lookup Method group box to determine how you look up a house account record.

Search using Account # only — Searches for house accounts by account number. Related Option: To define a house account number, type the number in ‘Account #’ in Maintenance > Payments > House Accounts.

Search using Account Name only — Searches for house accounts by the account name. Related Option: To name a house account, type the name in ‘Account Name’ in Maintenance > Payments > House Accounts.

Search Account # and then Account Name — Searches for house accounts by the account number, then if nothing is found, searches for the account name.
Add Charges Tab

Use the Add Charges tab to add a flat or percentage charge to a guest check. In addition, you can exempt one category, or you can exclude additional charges when using specific order modes.

If you select a category on the Add Charges tab, the items sold from that category are exempt from the additional charge.

Select the Add Charges tab from the Financials group.

![Figure 2-17 Store Settings - Financials Group - Add Charges Tab]

**Use Additional Charges** — Enables additional charges be applied automatically to the guest check per the defined criteria. Once selected, the system checks for an inclusive GST tax in use, and once found, disables both the ‘On Comps’ and ‘On Promos’ text boxes and adds additional
charges to the full item prices. In addition, the system disables the ‘Amount’ text box so that you may not use a flat rate for the additional charge. If ‘Use Additional Charges’ is cleared, the additional charge does not appear on FOH or BOH reports.

Notes

The GST tax is the only tax that may be applied to an additional charge.

**Name** — Denotes the name of the additional charge.

**Text:** — Determines the text to print on the guest check when the additional charge is added. For example, you may wish to print ‘Service Charge’ as the description on the guest check, rather than ‘Additional Charge.’

**On Promos?** — Indicates whether the additional charge is applied to promo(s). If selected, the additional charge is applied to the subtotal of the guest check including the amount of the promo(s). If ‘On Promos’ and ‘Amount’ are both selected, the check box becomes disabled and you are unable to change the settings as long as a fixed amount is used. If you change the ‘Amount’ setting to ‘Percentage’ at a later time, the On Promos and On Comps check boxes become fully enabled again.

**On Comps?** — Indicates whether the additional charge is applied to comp(s). If selected, the additional charge is applied to the subtotal of the guest check, including the amount of the comp(s). If ‘On Comps’ and ‘Amount’ are both selected, the check box becomes disabled and you are unable to change the settings as long as a fixed amount is used. If you change the ‘Amount’ setting to ‘Percentage’ at a later time, the check boxes become fully enabled again.

**Print On Reports?** — Enables you to report additional charges on the FOH and BOH Sales and Sales by Revenue Center reports.

**Display Additional Charge?** — Displays any additional charges on the FOH Order Entry screen.

**Format Group Box**

Use the Format group box to define whether the additional charge uses an amount or a percentage rate.
Amount — Displays a numeric value which represents the flat charge the system automatically adds to each guest check. The default value is 00000.00. This option disables the ‘Percentage’ text box.

Percentage — Displays a numeric value which represents the multiplier used in concert with the subtotal on the guest check. The default is 00.0000. This option disables the ‘Amount’ text box.

Exclude category — Designates a category to exempt from the additional charge. If you need to add or modify a category, click Category to access the Categories function. When you modify a category, the change applies to all items assigned to that category.

---

**CAUTION**

*If you select a category on the Add Charges tab, the items sold from that category are exempted from the additional charge.*

Printing

Use the Printing group to set up various styles and content for printing, excluding chit printing, for the whole restaurant. The options in the Printing group allow you to define:

- What prints on the guest check, such as the grand total, signature lines with messages, and user-defined text to replace the Tip line.
- A slip to print for logging comp reasons, when you apply a comp.
- Other requirements you need to print on the guest check, such as consolidation, the revenue center, the bar code, and the day part.
- Store-wide numbering that prints and numbers all checks in the sequence in which you begin ordering, regardless of revenue center numbering.
- The line space to leave at the top and the bottom of the guest check for proper aligning and centering.
- Large fonts to print on the guest check.
- An extra check stub for the guest to hand to a cashier upon exiting, such as in a wait-staff cafeteria environment.
- The requirements for printing the checkout report, such as including the check count, non-cash tenders, and period to date (PTD) tips.
- A custom checkout report to print with the standard FOH checkout report, or replace the entire FOH checkout report with custom information.
- The hourly threshold for the FOH Break Alert report.

To access the Printing group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select Printing from the ‘Group’ drop-down list.

The Printing group provides the following tabs: Check Content 1, Check Content 2, Check Style, Multi-Part Checks, Employee Checkout Cfg, and Reports.
Check Content 1 Tab

Use the Check Content 1 tab to select subtotals and totals that print on guest checks.

Guest Check Group Box

**Print a Grand Total** — Enables the grand total, including the total, gratuity, and tips, to print on the closed guest check.

**Print Category Totals** — Prints sales category totals (subtotal and grand total) for each category that is rung up.

**Print Quantity before Item** — Prints the quantity of items before the item name on the guest check, such as 2 Hamburger (@ 2.50). This does not apply to quantity priced items.

**Do not print Tax Line if Tax amount is zero** — Omits printing a tax line on the guest check if the total amount of tax on the check is zero.

**Print Comps/Promos Above Subtotal** — Prints comp and promo information before the subtotal.
Print Header on Open Guest Check — Enables you to configure text, to print in the header, to indicate the status of the guest check as open. This meets the legal requirements for International countries, such as Columbia.

Open Guest Check Text — Specifies the text to print in the header of an open check. If you leave this blank, the system does not print a header. **Required Option:** You must select ‘Print Header on Open Guest Check’ to enable this option.

Print Header on Closed Guest Check — Enables you to configure text, to print in the header, to indicate the status of the guest check as closed. This meets the legal requirements for International countries, such as Columbia.

Closed Guest Check Text — Specifies the text to print in the header of a closed check. If you leave this blank, the system does not print a header. **Required Option:** You must select ‘Print Header on Closed Guest Check’ to enable this option.

Other Options on the Check Content 1 Tab

Print Total, Tip and Signature Lines on all Checks — Adds the Total, Tip, and Signature lines to the guest check.

Print this text before tip line — Denotes the desired text to display before the tip line in the lines provided. For example: *If Paying by Credit Card, Enter Tip and Total Here.*

Text to replace “Tip” — Replaces text that displays instead of the standard Tip line on the guest check.

Print defined Comp Check lines — Enables defined information, using a text file, to print with a guest check when a comp is applied. The printed message can be different based on the applied comp. Use this for record keeping purposes in restaurants that require a manager to complete a short form for each check containing a comp.

Print when comp is applied — Prints the comp form when you apply the associated comp to a check. **Required Option:** You must select ‘Print defined Comp Check lines’ to enable this setting.

Number of copies — Specifies the number of comp forms to print when you apply the comp to the check.
Defining the Comp Message to Print

The comp form only prints when the check is closed and when you apply a comp to the check. Configure the comp form layout by creating a text file titled CompForm.txt in the \Data folder. Only one instance of the comp form prints per check. For example, if you apply the same comp to a check twice, the comp form prints one time.

The system also supports multiple comp forms. Rather than have a CompForm.txt file, which prints any time you apply a comp to a check, you can configure multiple comp file forms titled, CPFnnnnn.txt, where nnnnn is the ID number of the comp. For example if you apply comp ID 101 to a check, and CPF101.txt is found in the \Data folder, CPF101.txt prints. In the event a comp ID number does not have a corresponding comp form file, CompForm.txt prints.

Use the following rules when adding content to CompForm.txt:

- Start each line with ‘MSG.’ All other lines are ignored.
- Insert an ‘&’ in the fifth text line position (MSG plus one space) to instruct the printer to perform a partial cut (if the printer is capable).
- Insert an ‘^^’ in the fifth text line to insert the system date and the check number on the left side of the form. This uses a \yyyy\mm\dd – 999999 format (for example, 2001\06\06 – 10001).
- Insert an ‘@’ in the fifth text line to instruct the printer to start using a large font.
- Insert a ‘#’ in the fifth text line to instruct the printer to stop using a large font.
- If the printed guest check is set to use the large font, then the comp form will default to the large font. You must use a ‘#’ at the beginning of the form to default to the smaller font.
- Since the paper cutter on the printer is not at the same location as the print head, paper cuts may appear several lines above the location defined in CompForm.txt. You will have to experiment with your printer type and compensate for this in your comp form design.
The following is an example of a CompForm.txt file:

<table>
<thead>
<tr>
<th>MSG &amp;</th>
<th>MSG ^</th>
<th>MSG @</th>
<th>MSG COMP SLIP</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSG Restaurant: ___________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG Shift: _______</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG #</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG Check All That Apply and Print Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG ___ Customer Relations _________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG Explanation: _________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG ____________________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG ____________________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG __ Executive Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG __ Manager Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG __ 50% Emp Meal</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG ________________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG Date 20</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG ________________________________</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG Description</td>
<td>Amount</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG Liquor</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG Beer</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MSG Wine</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Check Content 2 Tab

Use the Check Content 2 tab to select additional attributes to print on guest checks, such as suppressing voided items, printing the revenue center, and consolidating like items. Select the Check Content 2 tab from the Printing group.

Figure 2-19  Store Settings - Printing Group - Check Content 2 Tab
Do not print Voided items — Suppresses voided items from printing on the guest check. If cleared, voided items printed on the check as the word (VOIDED) and a negative amount.

Consolidate like items on check — Combines like items on the guest check, such as the format of (2 at 5.00). If cleared, like items display separately.

Print PMS Guest Name — Prints the name of the guest on the guest check, for checks closed to a tender used with PMS.

Print Revenue Center — Prints the revenue center on the guest check.

Print PMS Info — Prints the Room Number and Guest Name lines on the guest check. The guest can fill in this information when charging a meal to the room.

Refer to the Interfacing PMS with Aloha User Guide for more information on configuring and using PMS.

Suppress check number — Does not print the check number on the guest check. If cleared, the check number prints on the right side of the guest check.

Print Order Mode On Check — Prints the order mode on the left side of the guest check with the heading of Order Type.

Print Bar Code — Prints the bar code on the guest check. Typically, this is used in a cashier environment where the guest takes the check to the cashier and the cashier scans the check to access it with the Get Check functionality.

Print Day Part on Check — Prints the day part on the left side of the guest check with the heading of DAY PART.

Print Business Number — Prints the business or ID number on the guest check.

Use Store Wide Order Numbering Group Box

Use the Store Wide Order Numbering group box to systematically number all checks, across all queues. If cleared, checks number as defined in Maintenance > System > Order Entry Queues.

Use Store Wide Order Numbering — Activates the Store Wide Order Numbering functionality.
**Minimum Order #** — Specifies the minimum order number to assign to a guest check. This is the starting order number at the beginning of each business day.

**Maximum Order** — Specifies the maximum order number to assign to a guest check.

**Tax Detail Group Box**

Use the Tax Detail group box to determine whether the tax detail and total tax line prints on the guest check.

**Print Tax Detail** — Prints and separates taxes by ID number on the guest check. **Related Option:** This option enables the ‘Print Total Tax Line’ option.

**Print Total Tax Line** — Prints a total of the detailed taxes below the tax detail on the guest check. **Related Option:** You must select ‘Print Tax Detail’ to enable this option.

The following sample guest checks illustrate the tax detail print options. The guest check on the left was printed with ‘Print Tax Detail’ selected, and shows detail for food and alcohol taxes. The guest check on the right was printed with ‘Print Tax Detail’ and ‘Print Total Tax Line’ selected, and shows the same detail as the one on the left, with an additional line for the total of the two taxes.

<table>
<thead>
<tr>
<th>Sample Restaurant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server: Aloha</td>
</tr>
<tr>
<td>Table 12/1</td>
</tr>
<tr>
<td>Guests: 8</td>
</tr>
<tr>
<td>T-Bone Steak</td>
</tr>
<tr>
<td>Cherry Jubilee</td>
</tr>
<tr>
<td>Margarita</td>
</tr>
<tr>
<td>Michelob</td>
</tr>
<tr>
<td>Subtotal</td>
</tr>
<tr>
<td>Food Tax</td>
</tr>
<tr>
<td>Alcohol Tax</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td>Thank You</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Sample Restaurant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server: Aloha</td>
</tr>
<tr>
<td>Table 12/1</td>
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<tr>
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</tr>
<tr>
<td>Cherry Jubilee</td>
</tr>
<tr>
<td>Margarita</td>
</tr>
<tr>
<td>Michelob</td>
</tr>
<tr>
<td>Subtotal</td>
</tr>
<tr>
<td>Food Tax</td>
</tr>
<tr>
<td>Alcohol Tax</td>
</tr>
<tr>
<td>Total</td>
</tr>
<tr>
<td>Thank You</td>
</tr>
</tbody>
</table>

*Figure 2-20 Sample Guest Checks with Tax Detail*
Check Style Tab

Use the Check Style tab to specify font options on guest checks, such as postfix and prefix lines, the use of large fonts, and auto-print checks. Select the Check Style tab from the Printing group.

Prefix Lines — Specifies the number of blank lines to appear at the top of the guest check. This allows for an attractive guest check and paper cutting.

Postfix Lines — Specifies the number of blank lines to appear at the bottom of the guest check. This allows for an attractive guest check and paper cutting.

Item Tax Indicator — Designates the character to print next to any taxable item on the guest check or receipt. This is a one-character field, and is useful in a retail environment when wanting to differentiate between taxable and nontaxable items.

Hard Check Group Box

Use the Hard Check group box to define the prefix lines and how many lines to print on the hard check. A hard check, or slip, is a guest check that must be manually fed into the printer.
**Prefix Lines** — Specifies the number of lines to skip down when printing checks on a slip printer.

**Lines Per Sheet** — Specifies the total number of printable lines on the check, not including lines skipped, when printing checks on a slip printer.

**Font Options Group Box**

Use the Font Options group box to define attributes that pertain to the font of the guest check.

**Use large font for Check** — Uses a larger font size on the guest check.

**Use large font for the Balance/Change Due** — Prints the Balance Due and Change Due lines on the check in a larger font size.

**Use large font for the Check Name** — Prints the name of the guest check in a larger font size.

**Auto Print Checks Group Box**

Use the Auto Print Checks group box to determine when the system prints guest checks automatically.

**Auto-print when food is ordered** — Enables guest checks to print automatically when food is committed to an order mode, or ‘sent to the kitchen.’

**Other Options on the Check Style Tab**

**Print Refund Slip** — Prints a refund slip when you apply a refund from the FOH. **Related Option:** To enable an employee to perform refunds, select Maintenance > Labor > Access Levels > Financials tab and select ‘Cash Refunds’ and ‘Non-Cash Refunds.’

**Number of Copies** — Specifies the number of refund slips to print when you apply a refund from the FOH. You can print up to 10 copies of the refund slip. **Required Option:** You must select ‘Print Refund Slip’ to enable this option.

**Message** — Specifies the number of the guest check message that contains the text to print on the refund slip when you apply a refund. **Required Option:** To define the message for a refund slip, select Maintenance > Messages > Guest Check Messages.
**Multi-Part Checks Tab**

Use the Multi-Part Checks tab to enable the Print Check Stub feature and define how and what prints on the output. Select the Multi-Part Checks tab from the Printing group.

*Figure 2-22 Store Settings - Printing Group - Multi-Part Checks Tab*

**Print Check Stub Group Box**

Use the options in the Print Check Stub group box to support environments where a guest orders as they walk into the restaurant. The person taking the order enters the items into the system, without ordering them, and a check stub prints for the guest to take with them to the table. The guest will then hand the check stub to the server. The server verifies the order, accesses the guest check in the system, and begins the process of ordering the items. The server maintains the guest check during the meal, and provides the guest with a check when they are ready to leave. The guest pays the server or the cashier, upon exiting.

Using the options in the ‘Print Check Stub’ group box, you can define the information to print on the check stub, as well as control whether to print a check stub at initial order entry or to print a new check stub every time the server modifies the guest check.
The following is a sample check stub:

```
(Guest Check Message)
(Address)
(Telephone)

(Stub Text Line 1)
(Stub Text Line 2)
(Stub Text Line 3)

(Employee Name)  (Date)
(Check Number)   (Time)

(Order Items)

(Bar Code)
```

**Print Check Stub** — Activates the Print Check Stub feature and enables the remaining options in the ‘Print Check Stub’ group box.

**Use Guest Check Heading** — Displays two areas of guest check information on the check stub. The top area displays lines as defined in Maintenance > Messages > Guest Checks. Related Option: The second area uses the ‘Address’ and ‘Telephone’ text boxes defined in Maintenance > Store Settings > System group > Store Information tab.

**Print on Check Exit** — Prints the check stub each time you exit the check. The check stub does not print until you exit the check, regardless of whether or not you order an item.

**Single Print Only** — Prints only the check stub for the first time you open and close the check. It does not print when you make modifications to the check.

**Suppress Barcode Printing** — Does not print the bar code on the check stub. The bar code display is only supported on thermal printers.

**Stub Text** — Specifies the text to print on the check stub. Type up to 50 characters.
Employee Checkout Cfg Tab

Use the Employee Checkout Cfg (Configuration) tab to determine the information to print on the employee checkout slip when an employee completes a shift and completes the checkout process. You can also determine if a custom checkout should print with the standard checkout, or by itself.

If an employee has multiple checkouts per shift, the checkout prints the following lines:

Shift: 1
Checkout 1/2

Shift: 1
Checkout 2/2

Select the Employee Checkout Cfg tab from the Printing group.

Figure 2-23  Store Settings - Printing Group - Employee Checkout Cfg Tab
Print Only Custom Checkout — Prints only the custom checkout when an employee performs a checkout.

Refer to the Custom Checkout Feature Focus Guide for more information on configuring a custom checkout.

Print Zero Lines On Checkout — Prints all lines on the checkout report, even though some may be zero. If cleared, lines with zero values do not print.

Ckout Cash — Prints an alternate cash calculation on the checkout. The normal cash calculation adds all sales and subtracts all noncash payments to arrive at the cash amount. An extra section prints showing cash sales less charge tips to arrive at a cash owed figure.

Print Non-cash Tenders — Prints a separate listing for noncash tenders.

Inc. tax in Perf. Measures — Includes taxes in the totals printed for the Performance Measures report.

Change Due Detail for Non Cash Tenders — Prints, by tender, the total amount of change received from a noncash tender (gift certificates, travelers checks, etc.). If a guest check has multiple noncash tenders, the change due is allocated to the first noncash tender found on the check.

Print Check Count — Prints the number of checks closed during a shift.

Separate Tips and Grat in Tip Tracking — Splits the non-cash tips from the auto gratuity in the Tip Tracking section of the checkout report. Use this setting in environments where tips are paid each night, but auto gratuities are paid on the employee’s paycheck.

Print # of Check Splits — Prints the number of checks an employee has split, on the employee checkout report. Related Option: To allow an employee to split checks, select ‘Split Checks’ in Maintenance > Labor > Access Levels > Financial tab, and assign the access level to the employee.

Refer to the Split Checks in QuickService Feature Focus Guide for more information on splitting checks.
Print PTD Tips — Prints the day part and charged tips on the employee checkout. The sales for the current day and the percentage of sales are also printed.

Print Checks Group Box

Use the Print Checks group box to select options for printing the employee checkout.

Print Checks — Prints a separate listing for tendered checks. You may want to do this for troubleshooting a specific problem.

Sort by Revenue Center — Sorts guest checks by the revenue center in which they originated. Revenue center information is listed with the check detail information.

Reports Tab

Use the Reports tab to print the define the time interval for the FOH Flash report and Sales by Revenue report and define the threshold for the Break Alert report.

Select the Reports tab from the Printing group.

Figure 2-24 Store Settings - Printing Group - Reports Tab
**FOH Flash Report time interval** — Determines the number of minutes, per interval, to use for displaying the FOH flash report.

**Print Flash Report** — Enables you to print the FOH Flash report and displays the Print button on the FOH Entire Day Summary page. If cleared, you can only view the FOH Flash report.

**Suppress FOH Labor Report Wages** — Does not print wages on the FOH Labor report.

**Break Alert Threshold Hour(s):** — Defines the threshold in which employees can work continuously without a break before appearing above the Threshold line on the FOH Break Alert report. Enter time between 0 to 24 hours in decimal time. For example, type 4.25 to enter at total of 4 hours and 15 minutes. 0 hours indicates no threshold and all employees clocked in appear on the FOH Break report. **Required Option:** You must clear ‘Use Break Rules’ in Maintenance > Store Settings > Labor group > Breaks tab to enable this option.
Printing-Chits

Use the Printing-Chits group to set up various styles and content for chit printing, for the whole restaurant.

There are three types of production chits:

- Regular chits
- Tray chits
- Expediter chits

A regular chit prints items ordered per station. When pivot seating is enabled, item and seating information are included.

A tray chit is used in a pivot seating environment and is used by the person assembling the order and distributing it to the table by seat position. This feature provides the kitchen with a summary of the order’s contents, and the seat number to which each item belongs. All items from an order print on the tray chit, including the items routed to a specific printer station. The chit prints the summary by seating arrangement.

An expediter chit is similar to a tray chit, but prints a summary grouped by like items, instead of seating arrangement.

Use the options in the Printing-Chits group to define:

- The content to print on the chit, such as a summary section of items, consolidation of items, and if previously ordered items print with new items.
- The line space to leave at the top and the bottom of the chit for proper aligning and centering.
- The sorting of items and modifiers.
- Other requirements you need to print on the chit, such as consolidation, the order time in bold, the check number, a quantity number next to items, and how modifiers display on the chit.
- Table tents, such as how you increment the table tent number, and user-defined messages to display as prompts.
- Production chits, such as tray chit printing and expediter chit printing.
- Chit printing requirements when you perform a void.
To access the Printing-Chits group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select Printing-Chits from the ‘Group’ drop-down list. The Printing-Chits group provides the following tabs: Chit Content, Chit Style, Chit Appearance, Chit Fields, and Other Chits.

**Chit Content Tab**

Use the Chit Content tab to define what prints on the kitchen chit, the print mode, and how the items are sorted.

Select the Chit Content tab from the Printing-Chits group.

![Figure 2-25 Store Settings - Printing Chits Group - Chit Content Tab](image)

**Chit Type Group Box**

Use the Chit Type group box to print either the standard summary chit, a chit for each item, or both.

**Summary Chit** — Prints the standard Aloha chit with a summary of all items for the order, followed by a full cut.
**Single Chit Only** — Prints a chit for each item ordered, followed by a half cut.

![Figure 2-26 Single Chit Printing](image)

**Summary Chit with Single Chit** — Prints the standard Aloha chit with a summary of all items for the order, followed by a full cut, and a chit for each item ordered, followed by a half cut.

![Figure 2-27 Summary and Single Chit Printing](image)

### Single Chit Printing Options Group Box

When you select ‘Single Chit Only’ or ‘Summary Chit with Single Chit,’ you can consolidate like items on a single chit and specify up to 30 characters to print at the top of each single chit.
**Consolidate like items** — Prints same items with same modifiers in consolidation on the chit. For example, with single chit printing, an order with two Hamburgers and three Snappers prints five separate chits for each item. With consolidation, only two chits print, one with (2) Hamburgers and one with (3) Snappers.

![Figure 2-28 Consolidated Chit Printing](image-url)

**Optional Single Chit Text** — Prints additional text, up to 30 characters, at the top of the chit.

**Other Options on the Chit Content Tab**

**Disable standalone chit printing** — Disables chit information from printing to a local printer. Standalone chit printing is when the local terminal is the master and no other terminals are in use, therefore, all chits route to the local printer.

**Print message if order contains items routed to more than one order printer** — Prints message on the chit, if an order is routed to multiple printers. The message is summarized at the bottom of the chit as follows:

More Items @$<\text{printer name}>$

**Use Full Paper Cuts** — Cuts printed chits completely instead of partially.

**Print all items being ordered** — Prints all items of an order that have not been committed to an order mode. This is for a normal printing environment.
**Print entire order, with previous items** — Prints all items of an order, regardless if previous items have been committed to an order mode. For example, if a dessert is added to a check that contained a previously ordered entree, both the dessert and the entree print on the chit. Typically, this is used in QuickService environments where the entire order is distributed at once.

**Chit Style Tab**

Use the Chit Style tab to define how lines are printed, expediter printing, and sort options for the chit. Select the Chit Style tab from the Printing-Chits group.

**Leading Lines** — Sets the number of lines to print at the beginning of the chit to allow for a readable chit, paper cutting, and the placement of chits on a ticket wheel, or bar.

**Trailing Lines** — Sets the number of lines to print at the end of the chit to allow for a readable chit and paper cutting.

**Max Lines per Chit** — Sets the maximum number of lines you can print on the chit so the chit does not hang on to food or a hot surface. If the order exceeds the maximum lines, the system breaks the chit into multiple chits and prints $x$ of $y$ at the bottom of each chit.
**Max Items per Chit** — Sets the maximum number of items you can print on the chit so the chit does not hang on to food or a hot surface. If the number exceeds the maximum items, the system breaks the chit into multiple chits and prints $x$ of $y$ at the bottom of each chit. *Required Option:* To enable this feature, you must enter zero in ‘Max Lines per Chit.’

**Max Seats per Cook Chit** — Sets the maximum number of seats you can print on the chit so the chit does not hang on to food or a hot surface. If the number exceeds the maximum seats, the system breaks the chit into multiple chits and prints $x$ of $y$ at the bottom of each chit.

**Expediter Printer Group Box**

Use the Expediter Printer Group Box to define options when printing chits in an expediter environment.

**Expediter Printer** — Designates the printer in which a chit containing all menu items for orders will print. An order that has been split between two or more printer groups in the kitchen also prints in its entirety on the expediter printer. Orders not split between printer groups have no effect on the expediter. If you need to add or modify a printer, click Expediter Printer to access the Printers function. When you modify a printer, the change applies to all areas assigned to that printer. *Required Option:* This option only affects the printers defined with ‘In Kitchen’ selected in Maintenance > Hardware > Printers > Options tab.

**Expedite even when items only route to 1 printer** — Prints an expediter chit when all ordered items are routed to one kitchen printer. If cleared, expediter chits print when an order is routed to two or more kitchen printers.

**Sort Options Group Box**

Use the Sort Options group box to determine the sorting of items and modifiers.

**Sort Items according to Priority** — Causes menu items to print on the chit in the assigned priority. Items are sorted before printed and according to their assigned priorities. *Related Option:* To assign a priority to an item, select a priority order from ‘Priority’ in Maintenance > Menu > Items > Item tab.

**Always use maximum modifier priority** — If a modifier has a higher priority than the item it is modifying, the entire item takes on the priority of the highest modifier priority.
**Print a separator line between Priority** — Prints a separator line between menu items with different priorities. **Required Option:** This works in conjunction with ‘Sort Items according to Priority.’

**Modifier Sorting** — Sorts the modifier on the chit according to the method selected in the drop-down list. Select one of the following sorting methods:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Displays modifiers in the order you enter them for the item.</td>
</tr>
<tr>
<td>Priority</td>
<td>(1) Sorts based on the priority defined for the modifier in Maintenance &gt; Menu &gt; Items &gt; Item tab. (2) If modifiers have the same priority, then sorts based on the order of the modifier groups attached to the menu item. (3) Sorts in alphabetical order.</td>
</tr>
<tr>
<td>Priority Only</td>
<td>(1) Sorts based on the priority defined for the modifier in Maintenance &gt; Menu &gt; Items &gt; Item tab, but identical modifier items are kept together. (2) Sorts by alphabetical order.</td>
</tr>
<tr>
<td>Modgroup</td>
<td>(1) Sorts based on the order of the modifier groups attached to the menu item. (2) Sorts based on the priority defined in Maintenance &gt; Menu &gt; Items &gt; Item tab. (3) Sorts in alphabetical order.</td>
</tr>
</tbody>
</table>
Chit Appearance Tab

Use the Chit Appearance tab to define the appearance of the chit, such as font attributes, and how to print modifiers. Select the Chit Appearance tab from the Printing-Chits group.

Font Group Box

Use the Font group box to define the font attributes you can use with chits.

Print Modifiers in Red — Prints all modifiers in red ink when printed on color printers, or in reverse type on other printers.

Print only Selected Items in Red — Prints menu items defined to highlight, in red ink when printed on color printers. On some printers, the item may display in reverse type. Related Option: To define items to display highlighted, select ‘Highlight’ in Maintenance > Menu > Items > Miscellaneous tab.

Show Entry Fields in Inverse — Displays text lines in white against a shaded background.

TBone
**Print in Large Font** — Prints the chit in a larger font.

**Print Double Height Text** — Doubles the height of the text.

**Print Native Items in Bold** — Prints items used as a modifier in bold. For example, a salad used as a modifier for a steak, prints in bold, however, if the salad is used as a menu item, it prints normal.

**Print Chit Time in Bold** — Prints the time header information in bold.

**Print Irregular Items in Bold** — Prints items with No, Side, Extra, and Sub in bold. **Related Option:** To define irregular items to print in red, select ‘Print Irregular Items in Red’ in Maintenance > Store Settings > Printing - Chits group > Chit Appearance tab.

**Print Irregular Items in Red** — Prints items with No, Side, Extra, and Sub in red. **Related Option:** To define irregular items to print in bold, select ‘Print Irregular Items in Bold’ in Maintenance > Store Settings > Printing - Chits group > Chit Appearance tab.

**Print Typed Item Indicators** — Prints the preceding and succeeding exclamation point indicators when you enter the item using the QWERTY keyboard. **Related Option:** To define typed items to print in red, select ‘Print Typed Items in Red’ in Maintenance > Store Settings > Printing - Chits group > Chit Appearance tab.

**Print Typed Items in Red** — Prints the entry in red when you enter the item using the QWERTY keyboard. **Related Option:** To define typed item indicators on the chit, select ‘Print Typed Item Indicators’ in Maintenance > Store Settings > Printing - Chits group > Chit Appearance tab.

### Wraparound Modifiers Group Box

Use the Wraparound Modifiers group box to determine how modifiers appear on the chit.

**One line per modifier** — Prints one line per modifier under the item being modified. This setting is the default for normal operations.

**Contiguous, on same line as item** — Prints modifiers as one single line along with the item being modified.

2 TBone Rare Salad Beans
Contiguous, on next line following item — Prints modifiers as one single line under the item being modified.

2 T Bone
   Rare    Salad    Beans

Tab Stops — Specifies the number of characters used to separate each modifier.

Other Options on the Chit Appearance Tab

Consolidate items with identical modifiers — Consolidates like items with the same modifiers on the chit. Related Option: To apply consolidation to a table using pivot seating, select ‘Table items only.’

2 T Bone
   Rare
   Salad
   Beans

Consolidate items with different modifiers — Consolidates like items on the chit even if the modifiers are not the same. Related Option: To apply consolidation to a table using pivot seating, select ‘Table items only.’

2 T Bone
   1 Rare
   Salad
   Beans
   1 Medium Rare
   Salad
   Beans

Table items only — Applies consolidation rules to items going to the entire table when you are using ‘Pivot Seating.’ This accommodates banquet environments. The following example shows table consolidation with identical modifiers. Required Options: 1) You must select either ‘Consolidate Items with Identical Modifiers’ or ‘Consolidate Items with Different Modifiers’ to enable this option. 2) To enable pivot seating for all employees to use, select ‘Use Pivot Seating’ in Maintenance > Store Settings > Order Entry group > Guest Counts tab. 3) To enable pivot seat-
To enable pivot seating by job code, select ‘Pivot Seating’ in Maintenance > Labor > Job Codes > Table Service tab.

4) To enable pivot seating by revenue center, select ‘Use Pivot Seating’ in Maintenance > System > Revenue Centers > Guest Count Tracking tab.

The following example shows table consolidation with different modifiers:

2 T-Bone
   Rare
   Salad
   Beans
******For Table******

Print 1 in front of quantity 1 items — Prints a ‘1’ in front of any item that is ordered without another like item, instead of ‘>.’

1 T-Bone
   1 Rare
   1 Salad
   1 Beans

Print (parentheses) for quantity items — Prints the total number of like items in parenthesis in front of the item.

(6) BBQ Sandwich

Default Item Justification — Enables items to print with left, right, or centered justification.

Irregular Item Justification — Enables No, Side, Extra, and Sub to print with left, right, or centered justification.
Chit Fields Tab

Use the Chit Fields tab to define what prints on the kitchen chit. You can also activate the Table Tent feature, which includes defining the range of table tent numbers and what displays or prints on the screen and chit. Select the Chit Fields tab from the Printing-Chits group.

Print Check Number — Prints the check number on the chit.

Print Order Mode On Chit in Red — Prints the selected order mode(s) in red ink on the chit.

Print SKU Number — Prints the SKU number of the item on the chit. **Required Options:** You can define up to five SKU numbers per item in Maintenance > Menu > Items. If you order the item with a scanner, the system prints the appropriate SKU number. If you order the item without a scanner, the system prints the first available SKU number, found vertically in the five SKU text boxes. The system prints the SKU number before each item and its modifiers, if applicable and found, as shown in the ‘Chablis’ line item. If the SKU number cannot fit on one line, it wraps to the next line. If both the SKU number and item cannot fit on the same line, the system prints the

![Figure 2-31 Store Settings - Printing-Chits Group - Chit Fields Tab](image)
SKU number on the first line and the chit name on the next line, as shown in the ‘Special 50th Anniversary Goblet’ line item. If the item does not have a SKU number, the item prints as shown in the ‘2 Glasses’ line item.

![Figure 2-32 Chit Printed with SKU Numbers](image)

**Table Tents Group Box**

Use the Table Tents group box to configure the use of table tents. Table tents are physical markers placed on the table, by either the guest or the employee, to help identify the delivery of orders. This is common in a counter environment that does not employ the use of table numbers and the orders require preparation time. This reduces the time a guest spends in line. When enabled, the Aloha system requires you to enter a table tent number when you send an order to the kitchen that contains an item routed to a printer group. For example, if you only order a non-alcoholic beverage, which is commonly not routed to a printer, the table tent prompt does not display.

*Scenario*: The guest orders a pizza from the front counter. The employee takes a physical table tent with a number, hands it to the guest, and enters the same number when sending the order. The guest places the table tent at his table. The food is delivered to the correct location by comparing the number on the chit or guest check with the number on the table tent.

You can only assign one table tent number per check. The number is generated from all terminals in use and appears on the chit, guest check, and in the Change Due message box. It does not appear on the video screen, if you are using a remote display systems add-on. In operations where you wish to name certain orders with the ‘Name Order’ function, instead of using the table tent prompt, select ‘Suppress Table Tent for Named Orders.’
There are two FOH options for entering table tent numbers. The system automatically increments the table tent number by one for each order. You can override the system generated number and enter the number for each order, which starts a new numbering sequence. You can also use the ‘Force Sequence’ option to allow the system to keep the same numbering sequence and offer you the next table number, which you can accept or skip. Both options accommodate situations when a table tent is lost or not placed in order.

**Print Table Tent Numbers** — Activates the Table Tent feature and enables the remaining settings in the group box.

**Minimum Tent #** — Designates the beginning number in the series. Type a number up to 9998 and lower than the ‘Maximum Tent #.’ Leave this text box blank if you want to always manually enter the table tent number in the FOH.

**Maximum Tent #** — Designates the ending number in the series. Type a number up to 9999 and higher than the ‘Minimum Tent #.’ Leave this text box blank if you want to always manually enter the table tent number in the FOH.

**On-screen Prompt** — Designates the text for the prompt on the FOH Change Due message box, such as ‘Tent #.’

**Guest Check Message** — Designates the message line to display on the guest check, such as ‘Order #.’

**Chit Message** — Designates the message line to display on the chit, such as ‘Order #.’

**Suppress Table Tent for Named Orders** — Does not display a prompt for a table tent number when you perform a ‘Name Order’ function before you send the item to the kitchen. **Related Requirement:** To add the Name Order button function, access Maintenance > Menu > Panel Editor and add the Name Order button function to a panel in use.

*Scenario 1:* Enter an item that will be sent to the kitchen, name the order with the Name Order function, then send the order to the kitchen. The table tent prompt does not display.

*Scenario 2:* Enter an item that will be sent to the kitchen, send the item with an available order mode, then name the order with the Name Order function. The table tent prompt displays.

**Force Sequence** — Retains the original numbering sequence as defined in the minimum and maximum tent numbers. You can not manually enter a table tent number, but you can skip the offered table tent number and accept the next available number in sequence.
Other Chits Tab

Use the Other Chits tab to specify various chit settings for other types of chits you may print, such as tray chit printing, order taker chits, and void chits. Select the Other Chits tab from the Printing-Chits group.

Figure 2-33  Store Settings - Printing-Chits Group - Other Chits Tab

# Copies of Cash In/Out Chits — Denotes the number of chit copies to print for each petty cash in/out transaction. Set this to a number greater than zero.

Print Void Chits at Remote Printer — Prints only voided chits to a remote printer.

Print Void Chit when an item is voided — Prints a void chit when an item is voided.

Tray Chits Group Box

Use the Tray Chits group box to define a printer to use for tray chit printing and other requirements for the feature.
**Print Tray Chits** — Enables tray chit printing on the printer designated in the Tray Chit Printer drop-down list. This option facilitates the Sub-Orders feature. Items print to their designated printer routings and the expediter receives a full chit with all items listed for their respective sub-orders.

Refer to the Sub-Orders Feature Focus Guide for more information on configuring and using the Sub-Orders feature.

**Tray Chit Printer** — Specifies the printer to use for tray chit printing.

**Exclude specific category** — Enables the tray chit printer to exclude the category of items specified in the exclude category drop-down list. This feature is used with the Sub-orders feature so that a category of items, such as Beverages, does not print on kitchen chits.

**Exclude Category** — Specifies the category of items to exclude from printing on chits.

**Exclude all modifiers** — Does not print the modifiers on the tray chit.

**Max Seats per Tray Chit** — Sets the maximum number of seats per tray for each chit. If the order exceeds the maximum lines, the system breaks the chit into multiple chits and prints \( x \) of \( y \) at the bottom of each chit.

**Order Taker Chits Group Box**

Use the Order Taker Chits group box to activate order taker chit printing and define a message to print on those chits.

**Print Order-Taker Chits** — Prints order taker chits. **Related Option:** To assign an order entry employee, select ‘Order Taker’ in Maintenance > Labor > Job Codes > Table Service tab, and assign the job code to an employee.
**User Interface**

Use the User Interface group to define settings pertaining to the appearance of the FOH, screen timeouts requirements, and other elements that affect the user interaction with the system. Use the options in the User Interface group to define:

- The alert to indicate the system is in redundancy mode.
- The QuickSearch Employee Lookup feature.
- Whether to use the Enhanced Graphical Interface feature, or FOH theme, instead of the basic Aloha interface.
- Support information to appear on the FOH Floating Logo screen.
- The number of rows and columns to use for displaying modifiers on the FOH Modifier screen.
- The size and positioning of the FOH Change Due message.
- Requirements for pole displays, such as the text to print when not in use, and if the sub-total appears.
- Volume levels to help determine when to cut labor staff based on periodical sales totals.

To access the User Interface group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select User Interface from the ‘Group’ dropdown list.

The User Interface group provides the following tabs: POS, Order Screen, QuickService Layout, Pole Settings, and Volume Levels.
**POS Tab**

Use the POS tab to define the screen display and screen timeout settings, FOH theme, Enhanced Graphical Interface (EGI), touch screen beeps, and whether you use the QuickSearch Employee Lookup screens.

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**Show Cursor** — Displays a large ‘X’ on the FOH touch screen instead of a small dot, when used with a mouse. The small dot still appears on the FOH Enter Employee number screen.

**Show Redundant Mode Indicator** — Displays a red outline on the FOH Log in screen to indicate the system is in redundant mode. All terminals display the name of the terminal acting as the master terminal on the bottom center of the screen. The master terminal displays MASTER to indicate that it is the master terminal, along with the name of the acting file server.

**Use QuickSearch Employee Lookup** — Enables a FOH Lookup screen for every instance requiring you to select an employee. With this feature, you can search for employees alphabetically or by numeric ID.

**No Total Lines on unordered Checks** — Suppresses the check total line on all unordered guest checks, when printed.
Accept Keyboard Input — Enables the system to accept entries from an attached keyboard.

Qwerty — Displays the Qwerty keyboard to all employees for entry of names and descriptions. You can set this option to ‘Never’ use the Qwerty keypad, ‘Always’ use the Qwerty keypad, or ‘By Employee.’ Related Option: You can override this option for specific employees by selecting ‘Prefers Qwerty Keyboard’ in Maintenance > Labor > Employees > Employee tab.

FOH Theme — Denotes the pre-defined design theme to use for the Front-of-House interface, instead of the basic Aloha theme. For the QuickService product, the FOH theme only affects the standard screens, such as the Clock-In screen, Log-In screen, and others. You can install the themes and their corresponding bitmaps from the installation disk. The four available themes are:

- Blue Stone
- Fabric
- Marble
- Wave

Logo Screen Contact Information — Displays the Aloha support number or Internet address on the FOH Floating Logo screen.

Enhanced Graphical Interface Group Box

Use the Enhanced Graphical Interface (EGI) feature to use gradient, shadowing, and texture enhancements on buttons on the FOH. The computer running the interface must be set for High Color (16 bits or greater), and have 64 MB of RAM or greater. For new installations, the system automatically enables EGI on any system meeting these requirements. If the system does not meet these requirements, the regular default interface appears. For upgrades, you must enable this feature and select a theme. You can select from the themes provided by the system, or define your own EGI theme. You can not use this feature with any of the cool interface FOH themes.

Graphic Theme — Specifies the enhanced graphical interface theme to use on the FOH and BOH. Leave this set to ‘Default’ to display the basic interface, or select a theme provided by the system, such as ‘Lemon-Lime’ or ‘Pineapple.’ You can also custom design your own themes. This is done using EGI2.cfg. All themes you define in EGI2.cfg appear at the bottom of this list.

Disable Graphics on FOH — Disables the enhanced graphical interface on the FOH screens.
**Disable Graphics in Maintenance** — Disables the enhanced graphic interface on the BOH screens representing the FOH, such as menus, submenus, modifiers, exception modifiers, panels, and the floor plan.

**POS Screen Timeouts Group Box**

Use the POS Screen Timeouts group box to define the number of seconds without activity before the FOH screen times out and returns to the FOH Floating Logo screen.

**Default** — Denotes the number of seconds without activity before the FOH screen times out and returns to the FOH Floating Logo screen. This number should be set to reflect the individual needs of the restaurant, although 30 seconds is a standard setting.

**Order Screen Tab**

Use the Order Screen tab to define the number of rows and columns in your order entry screen, and to define categories available for use. Select the Order Screen tab from the User Interface group.

![Order Screen Tab](image)

*Figure 2-35  Store Settings - User Interface Group - Order Screen Tab*
**Order Entry Group Box**

Use the Order Entry group box to define the rows and columns for the FOH modifier screens, and whether modifiers sort in order by entry.

**Modifier Screen Rows** — Specifies the number of rows of item buttons to display for all FOH Modifier screens. For QuickService operations, you can either place modifiers on panels, for which this option does not apply, or you can use the TableService modifier screens. **Related Requirement:** To define modifier groups, access Maintenance > Menu > Modifiers.

**Modifier Screen Columns** — Specifies the number of columns of item buttons to display for all Modifier screens. For QuickService operations, you can either place modifiers on panels, for which this option does not apply, or you can use the TableService modifier screens. **Related Requirement:** To define modifier groups, access Maintenance > Menu > Modifiers.

**Sort Modifiers in order by Entry** — Sorts modifiers using the order in which you enter them in the FOH.

**Category for Item Lookup Group Box**

**Category** — Specifies the non-sales category of items available when you touch the Item Lookup button on the FOH Order Entry screen. If you do not want to limit items from the Item Lookup function, select ‘None.’

**Detect Card Type Group Box**

Use the Detect Card Type group box to enable the system to accept card transactions, using a magnetic stripe reader, and determine the card type based on the prefixes entered for the card type.

**Automatically Detect Card Swipe** — Configures the system to process card transactions by sliding a gift or credit card across a magnetic stripe reader and automatically detects the credit card type based on the prefix digits of the card. The check must be displayed in the guest check window to perform this action. If you clear this option, the automatic detection is disabled, and you must select the appropriate tender button in the FOH to apply the transaction. **Required Option:** To enter prefixes for card types, select Maintenance > Payments > Tenders > Type tab and type the prefix numbers in the ‘Prefix’ text boxes. **Related Option:** To automatically display the tender screen for the corresponding card type, select Maintenance > Payments > Tenders > Type tab and select ‘Always Display Tender Screen’ for the appropriate tender.
**Prompt for Unordered Items** — Prompts you to order any unordered items on the check when applying a card payment with the Automatically Detection of Card Types feature. The FOH prompt allows you to order items immediately, using a default order mode, or cancel the transaction. If cleared, the system immediately cancels the transaction without a prompt, if the check contains unordered items. **Required Options:** 1) You must select ‘Automatically Detect Card Swipe’ to enable this option. 2) To prompt for unordered items, you must configure a default order mode by selecting either Maintenance > System > Order Entry Queue and an order mode from the ‘Default Order Mode’ drop-down list or selecting Maintenance > Hardware > Terminals and an order mode from the ‘Order Mode’ drop-down list. **Related Option:** To enable the system to automatically display the tender screen for the corresponding card type, select Maintenance > Payments > Tenders > Type tab and select ‘Always Display Tender Screen’ for the appropriate tender.

**Suspend Mode Group Box**

Use the Suspend Mode group box to use with the Split Checks feature and place the system in suspended mode so you can order and tender a check without sending the items to the kitchen until you are ready.

**Indicator** — Specifies the indicator to appear in front of each suspended menu item, and in the top right corner of the FOH guest check window, when a check is in the suspended mode. The indicator does not print or display anywhere else but in the FOH guest check window. **Related Requirement:** To configure the system to allow you to suspend an order, access Panel Editor and add the ‘Suspend Items Toggle’ button function to a panel or script.

Refer to the Split Checks in QuickService Feature Focus Guide for more information on splitting checks.

**Other Options on the Order Screen Tab**

**Disable Multi-Select** — Requires employees to select single items from the on-screen guest check window. When you select a different item, the system clears the previously selected item. This prevents employees from deleting multiple items in one transaction, and provides a more accurate audit of the number of deletions the employee performs.
**Auto Navigate to Modifier Screens** — Automatically displays the appropriate modifier group associated with the menu item, when you select a modifier for the menu item in the FOH. The system always navigates to the ‘Classic’ modifier screen even when you are using system-generated modifier panels.

**Auto Replace Selected Modifier** — Causes the automatic removal and replacement of the selected modifier, when you select a new modifier from the modifier screen that appears when using auto-navigate. **Required Option:** You must select ‘Auto Navigate to Modifier Screens’ to enable this option.

### QuickService Layout Tab

Use the QuickService Layout tab to determine the position and size of the Change Due message on the FOH, as well as the properties of the on-screen guest check. Select the QuickService Layout tab from the User Interface group.

![Figure 2-36 Store Settings - User Interface Group - QuickService Layout Tab](image-url)
POS Change Due Message Box Positioning Group Box

Use the POS Change Due Message Box Positioning group box to define the X and Y coordinates, and the height and width of the FOH Change Due Message box. **Related Option:** To add the table tent number to the message box, select ‘On-screen Prompt’ in Maintenance > Store Settings > Printing-Chits group > Chit Fields tab.

**X Coordinate** — Defines the location along the X coordinate, in pixels, of the Change Due message box on the FOH.

**Y Coordinate** — Defines the location along the Y coordinate, in pixels, of the Change Due message box on the FOH.

**Height** — Defines the height of the Change Due message box, in pixels, on the FOH.

**Width** — Defines the width of the Change Due message box, in pixels, on the FOH.

Dismissal Options Group Box

Use the Dismissal Options group box to define how the system handles the dismissal of the FOH Change Due box after each transaction.

**Dismiss on touch** — Enables you to remove the FOH Change Due message by touching the screen. **Related Option:** This option disables the ‘Dismiss on close’ option.

**Dismiss on close** — Enables you to remove the FOH Change Due message when you close the cash drawer. **Related Option:** This option disables the ‘Dismiss on touch’ option. You must use the ‘Dismiss on touch’ option in the following situations:

- If you select ‘Printer Interface’ in Maintenance > Hardware > Cash Drawers > Drawer Type.
- If you have no cash drawer assigned to the terminal.
- If you configured self banking and the employee has not been assigned a cash drawer.
- If the employee clocks in under the training mode.

**Dismiss after ___ seconds** — Specifies the number of seconds, up to 999, for the Change Due message to remain on the screen when you do not touch the screen or close the drawer. Type 0 if you do not want an automatic removal. **Related Options:**
1) If you select ‘Dismiss on touch’ and touch the drawer before the timeout expires, the system removes the Change Due message.
2) If
you select ‘Dismiss on close’ and close the drawer before the timeout expires, the system
removes the Change Due message. 3) If you select ‘Dismiss on close’ and set the timeout value to
0, and the cash drawer malfunctions, you must refresh the system to release the Change Due mes-

Check Display Group Box

Use the Check Display group box to define how items appear on the FOH on-screen guest check.

Prioritize Items — Prioritizes items on the FOH on-screen guest check by the order you enter
the items. If cleared, the items appear in the order of their priority. Related Option: To configure
priorities on items, type a priority number in ‘Priority’ in Maintenance > Menu > Items > Item

Consolidate Items — Combines like items as one item line with a quantity number, on the FOH
on-screen guest check. If cleared, items appear listed separately. You can toggle consolidation
with the Page/Half Page icon at the top of the FOH on-screen guest check.

Prioritize Modifiers — Prioritizes modifiers on the FOH on-screen guest check by the order you
enter the modifiers. If cleared, the modifiers appear in the order of their priority. Related Option:
To configure priorities on items, type a priority number in ‘Priority’ in Maintenance > Menu >

Quick Combo Group Box

Use the Quick Combo group box to define the template panel to use for the system-generated
quick combo selection and substitution panels and the sorting method to use for the panel. Addi-

Sort Quick Combo Panel by ___ — Specifies the sorting method to use for the system-gener-
ated quick combo item selection and substitution panels. You can sort items on these panels by
the ID number, short name of the item, or upsell level.

Quick Combo Template Panel — Specifies the panel to use for the system-generated quick
combo selection and substitution panels. If you do not define a template, the system uses the first
button on the upper-left corner of the panel on which the button resides to define the display prop-
properties of the buttons on the quick combo item selection panel. The quick combo substitution panel does not adhere to the properties of the first button on the upper-left corner of the panel. **Related Requirement:** You must access Panel Editor and create a panel to use for a template panel.

**Scan Quick Combo from last to first** — Enables the system to scan quick combos that were auto-applied, in the reverse order you entered them.

**Display Combo Items Instantly** — Specifies that quick combo items appear as you enter them for the order, rather than waiting until you enter all components for the quick combo. Use this option so the guest and the employee can validate the items are correct on the FOH guest check window, order confirmation display, pole display, and video screen. **Related Option:** To use this option for video screens, you must access Maintenance > Hardware > Video Queues > Display Options and select ‘Display Items as Entered’ from the Display Method drop-down list.

# Pole Settings Tab

Use the Pole Settings tab to define options for pole displays in use, such as a user-defined message on the pole display when the terminal is not in use and whether to display the guest check subtotal during ordering. **Required Option:** To enable pole displays, select ‘Use Pole Display’ in Maintenance > Hardware > Terminals > Other tab. Select the Pole Settings tab from the User Interface group.

![Figure 2-37 Store Settings - User Interface Group - Pole Settings Tab](image)
**Display Message on Pole Display When Not in Use** — Enables text to appear on the pole display when the pole display is not in use. If employees self-assign their drawers, the message appears after the FOH “You are now assigned to the bank” message.

**Text** — Designates the text to appear on the pole display, such as “Closed” or “Next Register,” when the pole display is not in use.

**Show Subtotal on Pole Display** — Displays the running subtotal on the pole display.

**Display gift card balance on pole display** — Displays the remaining balance of a gift card on a pole display when closing the check to a gift card tender.

**Pole Display Timeout** — Specifies the number of seconds of inactivity before the pole display message disappears from the pole display.

**Volume Levels Tab**

Use the Volume Levels tab to set indicators for the volume of business at a particular time. This indicator is shown on the FOH and video status bars. Select the Volume Levels tab from the User Interface group.

![Volume Levels Tab](image)

*Figure 2-38  Store Settings - User Interface Group - Volume Levels Tab*
POS Volume Reporting Group Box

Use the POS Volume Reporting group box to set the system up to indicate and monitor a specific level of sales at times of the restaurant. When sales reach a specified amount, the volume level changes so managers can determine their flow of business and when to cut staff. The FOH displays the level of operation on the status bar based on the amount of gross sales over the defined interval. **Required Option:** To set volume levels, you must define a series of levels in Maintenance > System > Volume Levels, that contain a range of dollar values for gross sales (high and low), and define an interval to be used as a comparison time frame.

**The system checks every _ minutes to update the Volume Level** — Designates the interval in which the system checks restaurant sales and changes the volume level, if necessary.

**Default Volume Level** — Specifies the starting volume level to appear on the FOH.
Security

Use the Security group to define important security restrictions for the whole restaurant and all employees to use. Use the options in the Security group to define:

- Additional features, such as Drawer and Payment Reconciliation, and Aloha Spy.
- Requirements for passwords, such as the minimum and maximum number of digits, and if passwords are disabled, optional, or required.
- Whether BOH users can change item prices.
- Cash drawer security requirements, such as pre-opening the cash drawer without a transaction, and hiding the cash drawer amount from the employee.

To access the Security group, select Maintenance > Store Settings. The Store Settings function appears with Order entry as the default group. Select Security from the ‘Group’ drop-down list. The Security group provides the following tabs: POS Security, POS Password Settings, Restrictions, and Cash Drawer.
POS Security Tab

Use the POS Security tab to enforce security for the restaurant, such as activating the use of Aloha Spy, establishing the location from which to run the reconciliation features, and whether to use non-reset reporting totals. Select the POS Security tab from the Security group.

**Use Non-Reset Totals** — Carries sales totals over to the next day of business without resetting them to zero. These figures appear on the BOH Sales Summary and Weekly Summary reports.

**Use Aloha Spy** — Activates the use of the Aloha Spy feature which interfaces with the TVS security video. The camera in use displays order entry information, along with the image, in the BOH.

Refer to the Aloha Spy Feature Focus Guide for more information on configuring and using the Aloha Spy feature.
Run Payment Reconciliation From Group Box

The Run Payment Reconciliation From group box determines from where you will perform Employee or Drawer Reconciliation.

Refer to the Drawer Reconciliation or Payment Reconciliation Feature Focus Guides for more information on configuring and using the reconciliation features.

Front and Back of House — Activates and enables you to run the reconciliation features from either the FOH terminal or the BOH computer via Functions > Payment Reconciliation. This accommodates environments that can spare the use of a terminal while reconciling the drawer.

Back of House — Activates and enables you to run the reconciliation features from the BOH computer only, via Functions > Payment Reconciliation. This accommodates environments that cannot spare the use of a terminal while reconciling the drawer.

POS Password Settings Tab

Use the POS Password Settings tab to define the employee password and number digits, as well as to enable, disable, or require a password for each employee. Select POS Password Settings from the Security group.

![POS Password Settings Tab](image)
**Min Password Digits** — Specifies the minimum number of digits allowed for manually entered log in IDs and access approvals. This option does not apply to mag card use.

**Max Password Digits** — Specifies the maximum number of digits allowed for manually entered log in IDs and access approvals. This option does not apply to mag card use.

**Number Employee** — Specifies the number of digits all employees use when logging in to the system and approving access to functions. The system uses the employee ID number found in Maintenance > Labor > Employees. **Related Option:** If you select ‘Required’ in the Password group box and require more digits than the employee ID number, the employee must enter any leading zeros. For example, if the employee number is ‘105’ and maximum employee number is ‘4,’ the employee must enter ‘0105’ to log in.

**Password Group Box**

Use the Password group box to determine whether you disable, require, or optionally enter passwords in the FOH. Passwords are an extension to the employee’s log in ID. For example, if the employee’s log in number is 100, and the password is 100, then the employee must enter 100100 to log in to the system. **Required Option:** To require an employee to use passwords, select ‘Uses Password’ in Maintenance > Labor > Job Codes > Job Code tab and assign the job code to the employee.

**Disabled** — Disables the use of FOH passwords, including mag cards. The Change Password button does not appear on the FOH Employee screen. **Related Option:** This option overrides and disables the ‘Uses Password’ option in Maintenance > Labor > Job Codes > Job Code tab.

**Optional** — Enables all employees to log in to the system either with or without their password extension.

**Required** — Requires all employees to use passwords.
Restrictions Tab

Use the Restrictions tab to specify the minimum and maximum open item prices, the time allowed to void entries, and other restrictions. Select Restrictions from the Security group.

Allowable Open Item Amounts Group Box

Use the Allowable Open Item Amounts group box to define the minimum and maximum amounts you can enter for open items.

Min — Sets the lowest price that you can enter for an open item amount.

Max — Sets the highest price that you can enter for an open item amount.

Time Allowed To Void Entries Group Box

Use the Time Allowed To Void Entries group box to limit the amount of time all employees have to void items.
**Restrict Void Items** — Enables you to limit the amount of time all employees have to void items, once the item is ordered. **Related Option:** To define the number of minutes to void items, select ‘# of Minutes After Ordered.’

**# of minutes after ordered** — Specifies the number of minutes to allow you to void items, once the item is ordered. **Related Option:** You must select ‘Restrict Void Items’ to enable this option.

### Other Options on the Restrictions Tab

**Maximum Check Amount** — Sets the maximum amount, including taxes and surcharges, you can add to the guest check. Type a dollar amount of $0.01 to $999999.99. Type 0 if you do not want to set a restriction. The system displays an error message when you exceed this amount and you cannot add more items to the check. You must close the check, and start a new one.

**Restrict Open Items, By Access Level** — Uses access levels to determine who can use enter open items.

**Disable Real Time Updates** — Disable the real time updates feature and requires you to perform a full refresh to update the FOH with employee and PLU item changes or additions. If cleared, the system prompts you if you want to update the FOH with changes you made in the BOH.

**Allow Split Promos, Comps, TaxExempt** — Enables all employees to split a guest check to which a promotion, comp, or tax exemption has already been applied. **Required Option:** To allow an employee to split checks, select ‘Split Checks’ in Maintenance > Labor > Access Levels > Financial tab, and assign the access level to the employee.

Refer to the Split Checks in QuickService Feature Focus Guide for more information on splitting checks.

**Cannot Move Payment Types** — Disables the ability for all employees to move applied payments from one split check to another. **Required Option:** To allow an employee to split checks, select ‘Split Checks’ in Maintenance > Labor > Access Levels > Financial tab, and assign the access level to the employee.

Refer to the Split Checks in QuickService Feature Focus Guide for more information on splitting checks.
**Restrict Price Edit** — Prevents the editing of the price in Item maintenance, Submenu maintenance, and Modifier maintenance, and disables the Set Submenu Item and Set Modifier Item events.

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> If you do not have ‘Add’, ‘Edit’, or ‘Delete’ access to the Store Settings function in your BackOffice security level, the ‘Restrict Price Edit’ check box does not appear.

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**Tip and Sales Distribution** — Establishes whether you allow the distribution of tips and sales for checks from prior days, checks from the current day, or checks from both, when using Tip and Sales Distribution. Select ‘Prior’ to work with checks from previous days only and not checks for the current day. Select ‘Current to work with checks for the current day only and not checks from previous days. Select ‘All’ to work with checks from previous days and for the current day.

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Refer to the Tip and Sales Distribution Feature Focus Guide for more information on configuring and using the Tip and Sales Distribution feature.

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**Disable Petty Cash Accts** — Disables the use of petty cash accounts in the Aloha system.
Cash Drawer Tab

Use the Cash Drawer tab to specify cash drawer security settings, such as hiding the cash drawer amount for all drawers. Select Cash Drawer from the Security group.

Figure 2-42  Store Settings - Security Group - Cash Drawer Tab

Preopen Cash Drawer — Pre-opens the cash drawer on each cash in/out transaction.

Hide Cash Drawer Amount — Conceals the cash drawer amount. If selected, the calculated amount in the cash drawer does not display on the drawer screen.

Limit Public Cash drawers to Revenue Center — Uses public cash drawer access to revenue centers. Unless you assign a cash drawer to a revenue center accessed by the employee’s job code, the employee is unable to open the drawer.

NoSale with Items — Prevents the cash drawer from opening while employees enter orders. Once an order is complete, the cash drawer opens.
Allow Auto-open on Zero Total Checks — Automatically opens the cash drawer when the check is reduced to a zero balance. A zero balance occurs when you add items to a check, then the check is reduced to zero, using a void, comp and/or a promotion. A zero balance also occurs when employees try to close a check with a zero priced item, such as water. Related Option: This option overrides ‘Open Drawer on Close’ in Maintenance > Payments > Tenders > Tender tab.
System

Use the System group to define information about the store, and the capabilities of the system, for the whole restaurant. Use the options in the System group to define:

- Required time and date settings, such as the date of business (DOB), open time, first day of payroll week, and the local time zone.
- Security key licensing codes used by the Aloha system.
- Store information to use on reports and printing, such as the unit number, telephone number, and the store’s address.
- Requirements for interfacing with third party programs and applications, such as Aloha eFrequency and COM.
- Maximum item amounts to hold in the database, on a guest check, and item price changes.
- Debugging information generated by the store for troubleshooting, such as events, mag stripe readers, and pole displays.
- End-of-Day requirements, such as the Winhook batch file, a 24-hour environment, and whether the system copies .cdx and .tdx files to subdirectories.

To access the System group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select System from the ‘Group’ drop-down list.

The System group provides the following tabs: Date/Time, Licensing, Store Information, Interfaces, Aloha Settings, Disk Maintenance, End Of Day, and RFS.
Date/Time Tab

Use the Date/Time tab to define the business date, open time, first day of week, and time zone settings. Select the Date/Time tab from the System group.

![Figure 2-43 Store Settings - System Group - Date/Time Tab](image)

**Day of Business** — Specifies the business date (DOB) for the system, regardless of the actual calendar date. The system uses the date for events, trans.logs, reports, and other tracking information.

**Open Time** — Specifies the restaurant’s opening time for reporting and system requirements. The opening time is not the time the restaurant opens, but the time employees begin work.

**First Day of Week** — Specifies the first day of the payroll period for reporting purposes. Select the appropriate day from the drop-down list.

**Synchronize POS Time With Back Office Time** — Makes the time setting on your POS terminal correspond to the time setting on your back office file server. This causes SyncTime.exe to run every two hours for all terminals on the system, which synchronizes the terminal time with the time on the file server. It does not interfere with normal operations.
Time Zone Group Box

Use the Time Zone group box to determine the time zone of the restaurant, such as Daylight Savings Time (DST). Some countries and states do not observe or adhere to the United States standards for DST. For example, countries in the Southern Hemisphere that observe DST change their clocks in opposite directions, compared to the United States, and other Northern Hemisphere countries. A few parts of the U.S., and many of its territories do not observe DST at all. In all instances, local governments can provide information about time changes required for the observance of DST.

When you select ‘International Daylight Savings Time,’ the Aloha system creates TimeZone.ini, which stores the time zone settings, on the file server in the \Data directory. The latest versions of data in the \Data directory, and the new TimeZone.ini with the new settings, is copied from the file server to the FOH when the FOH terminals synchronize at restart.

On each FOH terminal and on the BOH file server:

1. Select Start > Settings > Control Panel.
2. Double-click the Date/Time icon.
3. Select the Time Zone tab.
4. Select the appropriate state or area from the drop-down list.
5. Select the Automatically adjust the clock for daylight changes check box. Note: You must select this option on the BOH file server, and all FOH terminals.
6. Click OK.

On the BOH file server:

1. Delete TimeZone.ini, located in \Data and \NewData. The TimeZone.ini only exists in the \Data directory if you set the time zone to international.
2. Log in to the BOH.
3. Select Maintenance > Store Settings > System group > Date/Time.
4. Select either No Daylight Savings Time or International Daylight Savings Time.
5. Click Save and exit the Store Settings function.

The following procedures are mandatory, to set Daylight Savings Time to no DST or INTL. It is not adequate to select the No Daylight Savings Time option or the International Daylight Savings Time option, without also performing the following procedures.
7. Exit the BOH and relaunch the BOH again with the new time zone settings. The TimeZone.ini file is built (if the time zone is set to International Daylight Savings Time).
8. Select **Utilities > Refresh Data** to update the TimeZone.ini file on all FOH terminals.

**U.S. Daylight Savings Time** — Sets the system to use United States DST settings. This is the default value, which uses the rules for DST currently in force in the United States.

**No Daylight Savings Time** — Specifies your area does not observe daylight savings time. This prevents the Aloha programs from springing forward or falling back. You must set all terminals and the file server to a state or area that does not observe DST for this variable to work properly.

**International Daylight Savings Time** — Specifies you are outside the United States and do observe daylight savings time. The DST rules of the local country are followed.

**Licensing Tab**

Use the Licensing tab to enter the security key numbers provided as part of the Aloha system installation. (Some Aloha products require six security codes.) The key information is specific to each restaurant, and must be entered correctly before the system is enabled. Incorrect security key information disables the Aloha POS system. Select the Licensing tab from the System group.
Security Key Information Group Box

The Security Key Information group box allows you to enter the security key information, exactly as printed on the key. Enter only zeros, there are no letter O’s in the code.

Line 1 - 6 — Represents the numbers labeled SEC1 to SEC6 on your security key information sheet.

Store Information Tab

Use the Store Information tab to enter the name, address, and phone number(s) of your location. Select the Store Information tab from the System group.

Figure 2-45  Store Settings - System Group - Store Information Tab

**Unit No** — Displays a unit number, up to six digits. This is optional and is useful for chain operators with unique store numbers for each location.

**Unit** — Displays the store name.

**Business Num** — Represents your business or federal ID number you want to display for tax reporting purposes.
**Address** — Displays the physical street address, city, state, and zip code on the two address lines.

**Mailing Address** — Displays the street, box, or other address used by your establishment for postal purposes.

**Telephone 1** — Denotes the phone number at your store.

**Telephone 2** — Denotes an alternate phone number for your store.

**City/Town** — Denotes the city or town address used for your store for postal purposes.

**State** — Denotes the state used for your store for postal purposes.

**Postal Code** — Denotes the federal zip code used by your store for postal purposes.

### Interfaces Tab

Use the Interfaces tab to define how the Aloha system interfaces with another program, such as COM and eFrequency. Select the Interfaces tab from the System group.

![Figure 2-46 Store Settings - System Group - Interfaces Tab](image-url)

*Figure 2-46  Store Settings - System Group - Interfaces Tab*
**eFrequency** — Activates the eFrequency program.

Refer to the eFrequency User Guide for more information on configuring and using eFrequency.

**Auto Start Back Of House Upon Startup** — Works in conjunction with the selected terminal to automatically start the BOH on the selected terminal at system startup. This option is normally selected when the Aloha network file server is the same as the master terminal. Select the BOH terminal on which to automatically start up upon refreshes.

**Third Party Interfaces Group Box**

The Third party interfaces group box permits the selection of a third party table management and/or frequent diner system software interface.

**COM Interfaces Group Box**

The COM Interfaces group box allows you to define the connection between the Aloha system and external applications and functions, such as the AddGCTip executable.

**Use FOH COM Interface?** — Enables you to use external applications through a COM interface. **Related Option:** This option enables the rest of the options on the COM Interfaces group box.

**Enable QSR Video KDS Interface?** — Allows you to interface, through COM, to the QSR video KDS software. **Required Option:** You must select ‘Use FOH COM Interface?’ to enable this option.

**External Activity Interceptors** — Specifies the application or .dll file in the \Bin directory in which the system interfaces through COM, such as PrinterIntercept.dll. **Required Option:** You must select ‘Use FOH COM Interface?’ to enable this option.
Aloha Settings Tab

Use the Aloha Settings tab to establish the miscellaneous settings for the Aloha system, such as the maximum number of items you can store in the system, log actions, disabling the auto-grind process and configuring requirements for RFS. Select the Aloha Settings tab from the System group.

**Maximum Number of Items ___ Thousand** — Specifies the maximum number of items (in thousands) you must create and store in the system. The default is 15,000. The maximum number of items that you can defined is 100,000.

**Maximum Number of items on a Check __ Thousand** — Indicates the maximum number of items, in one or two thousand, which you can add to the check. Items include lines such as blank lines, balance due line, tax lines, subtotal and total lines, and others.

**Maximum Number of Item Price Changes ___ Thousand** — Specifies the maximum number of items, in thousands, you can make active in the Price Changes function. This value refers to the cumulative number of active items spanning across all price change IDs. The lowest value possible is 5000, with 20,000 being the highest.

![Figure 2-47 Store Settings - System Group - Aloha Settings Tab](image)
**Number of Days to Keep FOH Debouts** — Specifies the number of days, with 14 days as the default, to keep FOH debouts on the file server. The system creates a debout file for each day with a Debout. yyyyymmdd.nn naming convention, where yyyyymmdd is the year, month, and day, and nn is the terminal number. Type ‘0’ to create a debout for only the current day, and when the End-of-Day occurs, the system deletes the file.

**HTML Help Page** — Enables you to select the help system you want to use when selecting Help > Aloha POS Help in Aloha Manager. The help system contains common tasks managers perform in the Aloha system. Enabling help and training your managers to look at the online Help first can reduce support calls and save money.

- **None** indicates you do not want to use the online help.
- **Radiant Hosted** indicates you want to use the help system hosted by Radiant Systems. This help system contains many features that make finding information quick and easy, such as a search feature and an index. To use the online help Radiant Systems hosts, you must have an Internet connection.
- **Custom** indicates you want to provide your own help files that you can store locally on the system or host yourself. Radiant Systems provides you with a set of Help files that you can leave as is, or customize to meet your needs. If you select ‘Custom,’ type the location of the help files or URL to the help files. Radiant Systems does not support any maintenance or support of the content found in a custom help file.

**RFS Debugging Severity Level** — Specifies the level of detail to capture in the Debout.RFS file, for use in confirming proper operation, or troubleshooting problems encountered with the Remote File Storage (RFS) feature. Select ‘0-None’ or ‘1-Severe’ from the drop-down list. Additional levels of severity are available by editing Aloha.ini, but cause a considerable degradation of system performance, when used. **Required Option:** You must select ‘Use RFS Communication’ in Maintenance > Store Settings > System group > RFS tab to enable this option.

**Number of Days to Keep RFS Debouts** — Determines the number of days, up to 999, the program retains RFS debouts, prior to automatic deletion. The default value is ‘14.’ Type a value that provides a level of security consistent with your business needs. You can reduce this value, as your network establishes a history of successful operation using RFS. **Required Option:** You must select ‘Use RFS Communication’ in Maintenance > Store Settings > System group > RFS tab to enable this option.

Refer to the Remote File Storage Feature Focus Guide for more information on using the Remote File Storage feature.
**Cannot Close Aloha Manager** — Restricts all BOH employees from closing Aloha Manager when Ctlsvr.exe is registered as a service. This option displays only when you log in with the ‘Super Secret Password.’ This restricts the three methods of closing Aloha Manager.

![Figure 2-48 Cannot Close Aloha Manager Message](image)

**Grind Group Box**

Use the Grind group box to define settings related to the grind process.

**Disable Auto-Grind** — Disables the automatic data processing and summarizing of previous day’s activities. Select this option only during the store’s initial setup or when troubleshooting the Aloha installation.

**Grind Audit** — Enables you to generate a file during the “grind process” called GndAudit.dbf. The “grind” process typically runs during the End-of-Day, or when you view reports. This file contains information you can use for troubleshooting and reporting, such as the number of times an employee reopens a check, reprints a check, deletes a promotion, and more.

**Grind Non-Sales Category** — Enables the system to include non-sales category information in the GndSales file. Due to the number of non-sales categories most installations use, this option requires additional disk space and processing time.

**Debug Group Box**

The Debug group box enables you to report data on specific actions by the Aloha system for troubleshooting.

**Debug Events** — Writes events to the debout log. This is found in the \Tmp\Debout directory.

**Debug Touch** — Writes actions from screen touches to the debouts.

**Debug MSR** — Writes actions performed with a mag stripe reader in use to the debouts.
**Debug Pole Display** — Writes actions passed from the Aloha system to a pole display in use, to the debouts.

**Debug EDC Service** — Writes actions passed from Aloha EDC to the Aloha system to the debouts.

**Debug PMS Communications** — Writes actions passed from the PMS in use to the Aloha system to the debouts.

**Continue FOH on log error** — Enables terminals to automatically fix corrupt transaction, printer, and video logs, and remain operational. If errors appear in these logs, a notification message appears in red on the FOH.

## Disk Maintenance Tab

Use the Disk Maintenance tab to control warning messages and purged information. Select the Disk Maintenance tab from the System group.

![Disk Maintenance Tab](image)

*Figure 2-49 Store Settings - System Group - Disk Maintenance Tab*

**Warning threshold** — Specifies (in megabytes) the amount of hard drive diskspace left when the low disk space warning is given.
**Number of days to keep on drive** — Specifies the number of days to store dated subdirectories on the hard drive. During the end-of-day process, the system compares the current system date against dated subdirectories and removes the dated subdirectories that are older than the number of days specified in this text box. Do not enter a value in this text box if you do not want to use the purge function, or if you do not perform regular backups.

**Use the archive bit to purge data** — Purges only the files that have the ‘Archive’ attribute cleared (turned off). There are many ways in which to clear the ‘Archive’ attribute, but normally this is done by a third-party backup program. You would not normally select the ‘Use the Archive Bit to Purge Data’ option unless you are using a third-party program to perform regular backups.

When you create or change a file, Microsoft® Windows® sets the ‘Archive’ file attribute (turns it on). If you specify a number in ‘Number of Days to Keep On,’ and do not select ‘Use the Archive Bit to Purge Data,’ during the end-of-day process, the system purges all dated subdirectories older than the number of days you specify. If you specify a number and you also select ‘Use the Archive Bit to Purge Data,’ the end-of-day process will not purge any file in which the ‘Archive’ attribute is not cleared (turned off), regardless if it is older than the number of days you specify.

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The system administrator should review the settings on the Disk Maintenance tab periodically, to verify that they are preventing unnecessary buildup of data on the file server. Verify with your accounting department that you are maintaining sufficient data.
End Of Day Tab

Use the End Of Day tab to define various End Of Day (EOD) settings and actions, such as the location of the Winhook batch file, a 24-hour environment, and reports to print at each End of Day. Select the End Of Day tab from the System group.

![Figure 2-50 Store Settings - System Group - End of Day Tab](image)

**Winhook** — Contains the name of a custom batch file to launch following the EOD. Custom batch files allow the automation of certain routines that are outside the Aloha system but that address Aloha data files, such as compressing or zipping data files, and copying them to another drive.

**Manual EOD Target** — Designates the time, using a 48-hour clock, in which you want a FOH message to appear over the floating logo screen reminding you to perform a manual End-of-Day. The message appears each time the floating logo appears until you run the EOD. For example, to define the reminder to appear at 1:00 a.m., type 25:00. To disable the reminder, type 00:00.

**Related Option:** If you select ‘DOB Can Not Exceed System Date,’ and the date of business is equal to, or greater than the system date, you cannot run a manual EOD. The message continues to appear until the system date is greater than the date of business, at which time you are able to run the EOD.
**Carryover Video Log Minutes** — Specifies the number of minutes of transactions sent to the video screen to carry over for the next business day. **Required Option:** You must select ‘24-Hour Operation’ to utilize this feature.

**Do Not Copy CDX/TDX Files at EOD** — Prevents the system from copying .cdx files to dated subdirectories at EOD. Two files, AdjTime.cdx and GndBreak.cdx, are copied regardless of this option.

**24-Hour Operation** — Indicates the restaurant is open 24 hours per day and causes the EOD process to operate differently in regards to handling open checks and clocked-in employees. When the EOD occurs, the system closes all open checks and clocks out all clocked-in employees to finalize the date of business. The system also retains any unordered items left on the check in the event the EOD or a system refresh occurs; however, it does not retain items that are in progress and are not completely entered. Before the EOD process completes, the system clocks the employees back in and reopens the closed checks with a new check number and the sales are attributed to the new DOB. **Related Options:** 1) This option enables the ‘Credit Sales to First Period of New Day’ option. 2) If you select ‘24-Hour Operation’ along with ‘Auto Clockout’ in Maintenance > Store Settings > Labor group > Employee Settings tab, the system clocks employees out at the time the EOD runs, but does not clock them back in for the new business day. If you select ‘24-Hour Operation’ and clear the ‘Auto Clockout’ option, the system clocks employees out at the time the EOD runs and then clocks them back in for the new business day.

### Reporting Behavior with 24-Hour Operations

<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee checkouts show sales for the entire shift, even if it encompasses two days of business.</td>
<td>Although the system attributes the sales from checks still open at the time of the EOD process to the new DOB instead of the previous DOB, the BOH check reprint function still list these checks for both dates.</td>
</tr>
<tr>
<td>If you are verifying report calculations using reprinted checks, some checks may not apply to the DOB in question.</td>
<td>FOH sales reports for the new DOB include sales from checks that were still open at the time of the EOD.</td>
</tr>
<tr>
<td>The time stamp displayed on checks listed in the FOH View Open Checks function is true to the time the check was originally opened.</td>
<td>The open time does not reset following the EOD.</td>
</tr>
<tr>
<td>The Employee Break Report reports the end time as the time the EOD was run.</td>
<td></td>
</tr>
</tbody>
</table>

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**DOB Can Not Exceed System Date** — Specifies the date of business (DOB) must never move past the system date. The DOB should always match the current system date, to report sales properly and prevent errors from occurring between the BOH and FOH. Most sites configure the Aloha system to run the End-of-Day (EOD) process at a certain time via an event, to ensure the DOB increases to the next business day; however, some sites, such as 24-hour operations, invoke the EOD manually either from the BOH or the FOH. This increases the possibility of a site invoking the EOD process multiple times for the same business day, which creates multiple dated subdirectories containing sales from that day. You can now configure the Aloha system to prevent you from invoking a manual EOD if the date of business is ahead of the system date. The system date must increase to the next day before you can invoke an End-of-Day.

**Credit Sales to First Period of New Day** — Allows a 24-hour site to post sales from an open check, to the following day part, or day, when the EOD runs. For example, if you have open sales at 11:55, and invoke the EOD process at 12:00 while the check is still open, the sales are then deferred to the first day part of the new day. This allows the previous day to not show over-inflated sales amounts. **Required Option:** You must select ‘24-Hour Operation’ to enable this option.

**Print Selected POS Reports at End Of Day Group Box**

The Print Selected POS Reports at End Of Day group box enables you to select reports to print, and the printer destination to which to print, at the End of Day.

**Sales Summary Report** — Prints the FOH Sales Report at EOD.

**Clock In/Out Report** — Prints the FOH Clock In/Out Report at EOD.

**Daily Summary** — Prints the FOH Daily Summary Report at EOD.

**Quick Count** — Prints the Quick Count Report at EOD.

Refer to the Quick Count Feature Focus Guide for more information on configuring and using Quick Count.

**Report Printer** — Specifies the printer in which to print the selected POS reports at EOD.
RFS Tab

Use the RFS tab to configure the Aloha system to use Remote File Storage (RFS), a more secure method of communication between the FOH and BOH computers that does not rely on Windows file sharing. RFS installs and registers a new Windows service, RFSSvr.exe, the RFS server, on all computers in the Aloha network. This service facilitates network-wide communication of data in the Aloha system. One of the benefits of RFS is that you can use it to exceed the hard-coded limitation of ten connections, common to Windows NT-based operating systems using Windows file sharing.

Refer to the Remote File Storage Feature Focus Guide for more information on using the Remote File Storage feature.

Select the RFS tab from the System group.

Use RFS Communication — Causes the Aloha system, and its network, to use remote file storage as a means of communicating data between FOH terminals and the BOH file server, facilitated network-wide by the RFSSvr Windows service, which runs on all computers in the network. This change removes the need for any reliance on Windows file sharing on any of the computers.
in the Aloha network. Related Option: This option enables the ‘RFS Debugging Severity Level’ and ‘Number of Days to Keep RFS Debouts’ in Maintenance > Store Settings > Systems group > Aloha Settings tab.

Register Under the Local System Account — Causes the Windows service, RFSSvr, to register to operate under authentication of the local system network permissions account. This setting is appropriate for small networks not installed under a local domain name, and utilizing a BOH server with fewer than ten terminals.

Register Under a Specific User Account — Causes the Windows service, RFSSvr, to register to operate under authentication of a specific network permissions account, created for the sole purpose of registering the RFSSvr service. This setting is appropriate for larger networks, often, but not necessarily, using a local domain. The RFSSvr user account must reside on all terminals and the BOH server, and use the same password in each instance, if the network is not using a local domain. You must create the user and common password, and make it operational on the network, prior to activating this setting.

Account Name — Holds the name of the specific RFS user account used across the network, to authenticate the RFSSvr Windows service.

Password — Holds the common password used for the specific RFS user account. The program masks the appearance of the password with asterisks. Remember to use a complex password, composed of mixed case letters, numbers, and special characters.

Confirm Password — Requires you to repeat the password entered in the ‘Password’ text box, to confirm its accuracy.
International

Use the International group to define requirements that typically apply to areas outside of the United States (US). These requirements conform to policies and procedures for international establishments, however, you can also apply them to the United States.

Use the options in the International group to define:

- A perpetual check counter used to print a sequential number on the guest check.
- Rounding options for tenders.
- Special currency and the country in which you reside.
- International exclusive and inclusive tax requirements, such as backing out the tax from the order, or printing an tax breakout on the guest check.
- The date format used at the restaurant.
- International goods and services (GST) tax requirements, such as the tax invoice threshold, and whether to calculate the GST on comps and promos.

To access the International group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select International from the ‘Group’ dropdown list.

The International group provides the following tabs: International, Special Currency, Taxes, GST, and Check Counter.
International Tab

Use the International tab to define international formats, international date, and rounding options. Select the International tab from the International group.

International Field Formatting — Enables up to nine alphanumeric characters you can enter for the Social Security Number. This is important for International countries that do not use the standard nine-digit social security number format.

Print Cash Drawer Serial Number — Prints the cash drawer serial number on top of the cash in/out chit.

International bar codes (EAN) — Indicates your system is supporting International (EAN) bar codes and prints the weight on the bar code on the guest check.

Print Item Count Before Subtotal — Prints the total number of items on the guest check.

Text — Specifies the text to print before the item count number on the guest check, for example, ‘Item Number.’
**No Check Rounding** — Displays check totals as the exact check amount, not rounded.

**All Tenders Round to 0.05** — Rounds check totals for checks paid by all methods of payment to the nearest nickel. This cannot be selected in conjunction with ‘Cash Tenders Round to 0.05.’

**Display Adjustment** — Displays the rounding benefit on the guest check. The rounding benefit describes the variance between the sales total and the payments total when using check rounding. The rounding benefit may also be viewed on various reports in BOH.

**Cash Tenders Round to 0.05** — Rounds check totals for checks paid by cash only to the nearest nickel. This cannot be selected in conjunction with ‘All Tenders Round to 0.05.’

**Print Rounded Indicator** — Prints a mark on the check to indicate that the check total is a rounded amount.

**Method** — Specifies the rounding method to use on the check total. The three specific rounding methods are: Nearest, Up, and Down. The Rounding feature is a global setting, meaning that it applies to all checks and not by employee or job code.

**Country/Region** — Indicates the method to use for expanding data text boxes. This accommodates regions which require extra characters for names, addresses, and phone numbers. Select between United States, United Kingdom, or Universal Format.

**Date Format Group Box**

Use the Date Format group box to specify the character to use for separating the month, day of the month, and year. Each separator is one character; the separators do not have to be the same character.

**One** — Denotes the character to separate the first two fields (such as / or -).

**Two** — Denotes the character to separate the last two fields.

**Month Digits** — Specifies the number of digits to display. The default number is two.

**Day Digits** — Specifies the number of digits to display. The default number is two.

**Year Digits** — Specifies the number of digits to use for the date. Set this to two or four digits. The default is four digits.
YMD Order — Displays the date with the year first, followed by the month, then the day of the month.

DMY Order — Displays the date with the day of the month first, followed by the month, then the year.

MDY Order — Displays the date with the month first, followed by the day of the month and then the year. This is the default setting.

Sample Date — Displays an example of how dates display throughout the system, based on the selected order option (YMD, DMY, or MDY).

Special Currency Tab

Use the Special Currency tab to specify special currency regulations, such as the number of digits allowed, the currency symbol, and more. Select Special Currency from the International group.

![Figure 2-53 Store Settings - International Group - Special Currency Tab](image)

Use Special Currency — Indicates you are using a currency other than the U.S. dollar. The system overrides the standard decimal and monetary settings and uses values entered on this tab. Values entered in the International options are ignored unless this check box is selected.
Select Country-Currency — Establishes the country for which uses your local currency. Select your country, or select ‘Other’ and type the International Organization for Standardization (ISO) code. The system uses the Iso4217.csv file located in the \Data directory to populate this option with countries and ISO codes.

ISO Code — Indicates the International Organization for Standardization (ISO) code the system uses to determine the base currency of the restaurant. This field is usually populated with the correct ISO code when you select a country.

Number of Digits — Specifies the number of digits to the right of the decimal. Although two is the standard for North America, many nations require three digits to the right of the decimal.

Decimal Separator — Denotes the character used to separate whole values from fractional values (dollars versus cents, for example). If custom dictates that the separator is a period, such as in the United States, enter a period in this field.

Symbol — Denotes the symbol that indicates the amount is monetary. North America uses a ‘$’ while England uses a ‘£.’

Thousand Separator — Denotes the customary character that is used to separate numbers in thousands. For example, North American custom is to use a comma as the thousands separator; European custom is to use a period.

Print Check Total in all Currencies — Enables the guest check total to print in all currencies in use.
Taxes Tab

Use the Taxes tab to set various international tax policies, such as whether to exempt inclusive tax, print tax breakouts for inclusive and exclusive taxes, and more. Select Taxes from the International group.

Do Not Print Subtotal and Tax on Check — Disables printing the subtotal and tax on guest checks. Use this option with ‘Use Inclusive Tax Breakout.’ In European countries, only a total amount is required to print on checks.

Exempt Inclusive Tax — Removes inclusive taxes from the item price, when the check is tax exempt.

Indicator — Denotes the character or text to appear on the printed receipt to indicate the inclusive tax has been backed out of the price, when the check is tax exempt.
**Tax Breakout Group Box**

Use the Tax Breakout group box to print the base price and amount of inclusive and exclusive taxes charged for an item on the guest check. Printing the tax breakdown on the check is a requirement in some taxing jurisdictions. For example, European and Asian countries use an inclusive taxing method referred to as VAT (Value Added Tax), and these countries require you to break out the VAT tax amount on the check.

**Use Inclusive Tax Breakout** — Prints the subtotal and tax of the inclusively taxed items above the Balance Due line, and an additional tax breakout section below the Balance Due line. You configure the inclusive tax breakout section using the ‘Pre Text,’ ‘Tax Text,’ and ‘Base Text’ options.

**Print Inclusive Tax Breakout On Check** — Prints an inclusive tax breakout section at the bottom of the check.

<table>
<thead>
<tr>
<th>GST Taxes</th>
<th>Pre Text</th>
<th>Base</th>
<th>IncTax</th>
<th>Tax Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>8% Base 6.00 IncTax 0.48</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5% Base 5.00 IncTax 0.25</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2% Base 14.98 IncTax 0.30</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Pre Text** — Contains the text, such as GST Tax, to print before the tax information in the tax breakout section below Balance Due on the guest check.

**Base Text** — Contains the text, such as IncTax, to print before the pre-tax amount of the item in the tax breakout section below Balance Due on the guest check.

**Tax Text** — Contains the text, such as Base, to print before the tax amount in the tax breakout section below Balance Due on the guest check.
**Print Exclusive Tax Breakout on Check** — Prints an additional exclusive tax breakout section below the Balance Due line. You configure the exclusive tax breakout section using the ‘Pre Text,’ ‘Tax Text,’ and ‘Base Text’ options.

<table>
<thead>
<tr>
<th>Exclusive Taxes</th>
<th>8%</th>
<th>Base</th>
<th>6.00</th>
<th>Tax</th>
<th>0.48</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5%</td>
<td>Base</td>
<td>5.00</td>
<td>Tax</td>
<td>0.25</td>
</tr>
<tr>
<td></td>
<td>2%</td>
<td>Base</td>
<td>14.98</td>
<td>Tax</td>
<td>0.30</td>
</tr>
</tbody>
</table>

**Pre Text** — Contains up to 20 alphanumeric characters of text, such as ‘Exclusive Taxes,’ to print before the exclusive tax information in the tax breakout section.

**Base Text** — Contains up to six alphanumeric characters of text, such as ‘Base,’ to print before the taxable sales amount in the tax breakout section below Balance Due on the guest check.

**Tax Text** — Contains up to six alphanumeric characters of text, such as ‘Tax,’ to print before the tax amount in the tax breakout section below Balance Due on the guest check.
GST Tab

Use the GST tab to specify Goods and Services Tax parameters. Select the GST tab from the International group.

**Figure 2-55  Store Settings - International Group - GST Tab**

**GST Tax** — Lists the tax record corresponding to the GST tax in effect in your area. If you need to add or modify a category, click GST Tax to access the Categories function. When you modify a category, the change applies to all items assigned to that category.

**On Comps** — Applies GST tax to comps, when present on the guest check.

**On Promos** — Applies GST tax to promos, when present on the guest check.

**Tax Invoice Threshold** — The amount above which the GST tax applies to the guest check. Type a currency amount in the text box.

**Exempt Items** — Lists items exempt from the GST tax, if any, by item categories. Select a category from the drop-down list. If you need to add or modify a category, click Category to access the Categories function. When you modify a category, the change applies to all items assigned to that category.
GST Tax Text on Guest Check — Holds the message you wish to appear on the guest check, in response to application of the GST tax. Type the message in the text box.

Check Counter Tab

Use the Check Counter tab to set up the perpetual check counter function available to international sites. This function prints a perpetual check number in the top left corner of the guest check. Once set up, the counter is automatically activated when a guest check is entered on a FOH terminal. A binary file, Counter.bin, is created in the root directory (C:\) on the terminal in which the guest check is generated. All sales information is stored in this file.

The system tracks the following items on each terminal when the counter is activated:

- The total sales generated on a terminal.
- The total number of checks generated from a sale.
- The total number of server checkouts.
- The total number of sales reports printed.

💡 The perpetual check counter does not roll over at EOD. To reset the counter for the terminal, delete Counter.bin located in the root directory of the corresponding terminal.
Select the Check Counter tab from the International group.

![Check Counter Tab](image)

**Print Check Counter** — Activates the check counter feature, which prints a unique sequential number for each check at the store. You must create a Counter.bin file, located in the root directory of the terminal, to use this feature. **Related Option:** The Print Check Counter option enables the rest of the options on the Check Counter tab.

**Prefix** — specifies the text to print before the sequential number (check number) on the guest check. For example, *Check Number*.

**Pad with Zeros** — Enables the system to print the leading zeroes in the sequential number, as defined by the number of digits allowed in ‘Number of Digits.’ For example, if the number of digits for the check number is eight, the check number would print as 00005309.

**Number of Digits** — Specifies the number of digits, one to 10, to allow for the check counter number. **Required Option:** You must select ‘Pad with Zeros’ to enable this option.

**Print Store ID** — Prints the store ID with the check counter on the guest check.
**Pad with Zeros** — Enables the system to add leading zeroes to the store ID. *Related Option:* The ‘Unit No’ text box in Maintenance > Store Settings > System group > Store Information determines the maximum number of digits for the store ID.

**Print Terminal ID** — Prints the terminal ID with the check counter on the guest check.

**Pad with Zeros** — Enables the system to add leading zeroes to the terminal ID. *Related Option:* The ‘Term ID’ drop-down list in Maintenance > Hardware > Terminals determines the maximum number of digits for the terminal ID.

**Print Separator** — Prints a defined character as a separator between the store ID and the terminal ID. The default value for this option is a `<space>`. To exclude a separator, you must delete the space inside the text box.
Credit Card

Use the Credit Card group to activate and define EDC requirements for the whole restaurant. It provides on-line credit card authorization, preauthorization, verification, and settlement of credit card transactions. In addition, it provides a number of built-in management tools, such as real-time transaction tracking, maintaining transaction history files, and customized reporting functions.

Refer to the Aloha EDC User Guide for more information on configuring and using EDC.

Use the options in the Credit Card group to define:

- The activation of EDC and define other requirements, such as if employees can use the same credit card twice in one day.
- The system to automatically accept mock authorizations, with a floor down amount, when the system cannot connect to EDC.
- The system to allow employees to touch a single credit card button to process credit card transactions, instead of selecting a specific credit card type.
- The number of vouchers to print and the use of custom text lines for sales vouchers and refund vouchers.
- Which part, or all, of the credit card number to mask on the voucher.
- A ceiling amount to suppress the printing of the signature line on the voucher.

To access the Credit Card group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select Credit Card from the ‘Group’ drop-down list.

The Credit Card group provides the following tabs: EDC Setup, Voucher Printing 1, Voucher Printing 2, and Options.
EDC Setup Tab

Use the EDC Setup tab to activate the use of EDC and define requirements, such as mock authorizations, the EDC floor down amount, and the default tip authorization amount. If you are not using the Aloha EDC software, ‘Enable EDC’ and ‘Number of ICVerify Terminals’ are the only check boxes that you must select or enter a value. All other settings refer specifically to the Aloha EDC software. Select the EDC Setup tab from the EDC group.

Enable EDC — Activates EDC functionality.

Use Aloha EDC — Indicates you are using the Aloha EDC system in place of a third party system.

Use Chip ‘N Pin EDC — Indicates you are using a Chip ‘N Pin device.

Refer to the Chip and PIN UK Implementation or Chip and PIN Dutch Implementation Feature Focus Guides for more information on configuring and using a Chip and PIN device.
Use Canadian Debit — Indicates you are using debit cards in Canada.

Mock Authorizations When EDC is Down — Allows the FOH to do ‘mock’ authorizations for sales less than a pre-defined amount if the EDC credit card server is down. When selected, if the FOH attempts to do a credit card authorization when the EDC server is down, a ‘mock’ authorization is done immediately and the transaction is spooled later for an actual authorization. An .spl file is created in the \EDC directory on the master terminal. As soon as the EDC file server becomes available, the EDC program on the server scans for spooled transactions (.spl files).

In SuperSite mode, the EDC program must be reading from a terminal file which includes all the terminals; the Trm.dbf and the matching store file Sto.dbf. This allows EDC to identify the network names of all terminals. If any .SPL files exist, they are sent through the normal authorization process. The approved ‘mock’ authorization transactions are indicated on the Batch Transaction report with an ‘*’ to the right of the Authorization Number. All declined transactions are listed at the bottom. The ‘mock’ authorization mode is only activated when the BOH is down. If the BOH is up, ‘mock’ authorizations do not occur, even if the EDC program is turned off and is not processing requests. EDC is able to go into spooldown without losing network connection.

To force the system to display a notification that EDC is in spooldown, set the ShowSpooldown variable to True in Aloha.ini.

Show message when EDC is Down — Displays a message on the FOH when EDC cannot connect to the system.
**EDC Floor Down** — Indicates the dollar amount to represent the maximum mock authorization amount. Attempted mock authorizations over this dollar amount are declined. The system does not allow a floor down amount less than $1.00.

To allow a floor down amount less than $1.00, set the EDCNoFloorLimit variable to True in Aloha.ini.

**Show Last Settlement Alert if More Than ___ Hours Ago** — Defines the threshold, in hours, that you are allowed between settling your credit card batches, before a warning message appears on the Login screen letting you know you need to run a settlement.

**Only Read Track Two** — Designates the Mag Card Reader you are using reads only track two of the magnetic strip.

**Do Not Allow Force Tenders** — Forces all credit card payments to be electronically approved, rather than forced to tender. If cleared, the ‘Force’ button does not appear on the FOH Close screen.

**Cannot use same credit card twice in a day** — Prohibits the system from using the same credit card number for payment twice in the same business day.

**Number of ICVerify Terminals** — Specifies the number of ICVerify terminals to use. This text box is typically set to 1.

**Assume this Tip% for Authorization** — Designates the percentage of the order to add to the check total for authorization. For example, if this tip percentage is set to 15%, and a customer charges $20.00 on a credit card, the authorization builds in 15% on top of the original $20.00 for a total authorization of $23.00. There is a leeway of + or - 20% for restaurants and + or - 15% for retail before a downgrade fee is charged. If a restaurant does not have tipping, type 0.

**Mag Card Sentinels Group Box**

Use the Mag Card Sentinels group box to define the start, track, field, and end settings for mag card use. Do not modify these default options without specific instructions from the hardware dealer.
Voucher Printing 1 Tab

Use the Voucher Printing 1 tab to enter customized voucher text, and determine the voucher print style. Select the Voucher Printing 1 tab from the Credit Card group.

*Figure 2-58  Store Settings - Credit Card - Voucher Printing 1 Tab*

**Number of Voucher Copies** — Designates the number of vouchers to print for each transaction. If using a printer with preprinted vouchers and carbon or NCR paper, select and activate voucher 1.

**Voucher 1** — Designates the text to print on the first voucher copy.

**Voucher 2** — Designates the text to print on the second voucher copy.

**Voucher 3** — Designates the text to print on the third voucher copy.

**Voucher 4** — Designates the text to print on the fourth voucher copy.

**Print Large Text on Vouchers** — Prints the text on the voucher in a larger font size.

**Print Check Message on Vouchers** — Prints the active guest check message text on credit vouchers. Related Requirement: To define a guest check message, select Maintenance > Messages > Guest Check Messages.
Print Footer on Vouchers — Prints the text of a guest check message at the bottom of credit card vouchers. Select the guest check message from the ‘Message’ drop-down list. If you need to add or modify a message, click ‘Message’ to access the Messages function. Related Requirement: To define a guest check message, select Maintenance > Messages > Guest Check Messages.

Use Custom Text Lines on Sales Vouchers — Enables custom text to print on the sales voucher. Type up to 40 characters in each text box to print above the signature line, such as ‘Your account will be debited,’ in the first text box, and ‘with the above amount,’ in the second text box. Type up to 40 characters in the text box signature text box, such as ‘Cardholder signature.’

Use Custom Text Lines on Refund Vouchers — Enables custom text to print on the refund voucher. Type up to 40 characters in each text box, such as ‘Your account will be credited,’ in the first text box, and ‘with the above amount,’ in the second text box. Type up to 40 characters in the text box signature text box, such as ‘Merchant signature.’

Voucher Printing 2 Tab

Use the Voucher Printing 2 tab to specify the masking properties for credit card vouchers and suppressing the expiration date and the name of the cardholder. Select the Voucher Printing 2 tab from the Credit Card group.
Credit Card Number Mask — Designates the portion of the credit card or debit card number to display on the voucher. Select from ‘Always show full number,’ ‘Only show last 4 digits except on 1st voucher,’ and ‘Only show last 4 digits on all vouchers.’ If selected, the number is masked on the voucher, reprinted guest checks, and the Payment report.

Suppress Expiration dates — Does not print the expiration date on the voucher.

Suppress Cardholder Name — Does not print the name of the cardholder on the credit card voucher. When using a magnetic card reader, the system replaces the ‘Magnetic Card present: <cardholder name>’ line on the voucher with ‘Magnetic Card present: Yes.’ Required Option: You must select the number of vouchers to print from the ‘Number of Voucher Copies’ drop-down list in Maintenance > Store Settings > Credit Card group > Voucher Printing 1 tab to utilize this feature.

Options Tab

Use the Options tab to define the signature required ceiling requirements and how the system names tabs for unreadable cards. Select the Options tab from the Credit Card group.

Print check at the Master, when EDC Voucher prints — Prints an additional check at the master printer whenever a voucher prints at the voucher printer.
Print Void Slip — Prints a voided receipt from the original credit card transaction when you delete a credit card payment. The voucher reflects the full amount that was deleted, including the tip amount.

Signature Required Ceiling Group Box

Use the Signature Required Ceiling group box to define ceiling requirements to require the guest’s signature. This feature provides consumer convenience and faster service for the guest, and some credit card companies now allow merchants to forego the need to require a signature if the credit card purchase amount is under a certain limit. In addition, credit card companies sometimes offer a substantial discount for purchases tendered through a magnetic stripe reader.

No Signature Required if less than ___ — Specifies the minimum amount of credit card purchase to require a signature. If the purchase is less than the defined amount, a signature line does not print for the transaction. Type 0 to indicate all cards require a signature. Related Option: When selected, this option applies to all tenders; however, you can exclude specific tenders from these rules if you clear ‘Apply Signature Line Rules for Vouchers’ in Maintenance > Payments > Tenders > Type tab.

Manually Entered Cards — Applies the ceiling specified for the ‘No Signature Required if less than ___’ option to all cards manually entered in the Aloha system.

Swiped Cards — Applies the ceiling specified for the ‘No Signature Required if less than ___’ option to all cards entered in the Aloha system with a magnetic stripe reader.

Tapped Card — Applies the ceiling specified in the ‘No Signature Required if less than ___’ option to all cards entered in the Aloha system by tapping a proximity reader. Related Option: To use proximity readers, select ‘Use Proximity Reader’ in Maintenance > Hardware > Terminals > Readers tab.

Tab Name: Customer name not found Group Box

Use the Tab Name: Customer name not found group box to choose between the system naming the tab or displaying a prompt for entering the name of the tab, when track one is unreadable. The Aloha system has the unique ability to name a tab by capturing the name of the cardholder from track one on the credit card, when you slide the credit card across the magnetic stripe reader. However, in the event that track one cannot be read, the system cannot properly name the tab.
**System Names Tab** — Enables the system to associate a name with a tab when track one is unreadable, based on the first letter of the card type and the last four digits of the credit card number. For example, a tab named V5555 represents a Visa card with 5555 as the last four digits of the credit card.

**Prompt User for Tab Name** — Prompts you to enter the name to associate with a tab when track one is unreadable.
Delivery

Use the Delivery group to establish delivery order types and policies for operations that offer delivery service. This group is listed only if you are licensed to use the Delivery/Frequent Buyer (D/FB) program to track sales history for customers. D/FB also provides the ability to set up different programs to reward the guest, and encourages guests to buy more frequently with the use of coupons and bonus plans.

Refer to the Delivery Frequent Buyer Implementation Guide for more information on configuring and using delivery.

Use the options in the Credit Card group to define:

- Requirements for using Delivery, such as the maximum delivery fee, self-assigned orders, and the number of caller ID lines.
- Requirements, such as defaulting to the last order, printing an itinerary, and changing the font used in the customer selection screen and the Delivery screen.
- Order modes to associate with delivery, discounts, and petty cash accounts for driver cash account posting.

To access the Delivery group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select Delivery from the ‘Group’ drop-down list.

The Delivery group provides the following tabs: Delivery Setup, Delivery Setup 2, and Delivery Orders.
Delivery Setup Tab

Use the Delivery Setup tab to activate Aloha Delivery, and establish other important parameters of the delivery environment, such as the number of Caller ID lines. Select the Delivery Setup tab from the Delivery group.

**Use Aloha Delivery** — Enables the Aloha Delivery/Frequent Buyer program for use in the restaurant.

**Name Order By** — Determines the term the system uses to name the order on the guest check. Select Default, Phone, or Name from the drop-down list. If you select Default, the system uses the term defined in ‘Default Look-Up’ to name the order.

**Default Look-Up** — Specifies the criterion the system uses to search for a customer already in the database. Select Phone Number, Last Name, Company Name, or Card Number from the drop-down list.

**Maximum Delivery Fee** — Establishes the maximum amount the restaurant can charge to deliver orders.
**Maximum Self-Assigned Orders** — Determines the maximum number of orders drivers can assign to themselves at one time. **Required Option:** You must select ‘Self Assign Delivery Orders’ in Maintenance > Labor > Job Codes > Delivery tab and assign the job code to the employee.

**Number of Caller Id Lines** — Specifies the number of Caller ID buttons that appear on the Customer Lookup screen. Use this feature to insert one button for each Caller ID line installed in the restaurant that is used to the system.

### Delivery Setup 2 Tab

Use the Delivery Setup 2 to select additional options that define how the delivery environment functions. Select the Delivery 2 tab from the Delivery group.

![Figure 2-62 Store Settings - Delivery - Delivery Setup 2 Tab](image)

**Print Check When Transfer to Driver** — Causes the system to print the guest check to give to the customer, when the dispatcher transfers the order to a driver.

**Use Touch Screen Keyboard** — Displays a keyboard on the customer lookup and information screens when the Aloha system accesses the Delivery/Frequent Buyer program. You must select this option if you are not using an external keyboard.
**Default to Last Ordered** — Causes the system to open a new order, with the same order last placed by the customer. The Customer Lookup process must occur before opening a new order, for this to work.

**Detailed Checkout** — Adds specific information about delivery orders to the driver checkout.

**Sign In Balance Due** — Requires the driver to pay the balance of all delivered orders when they sign back in after making deliveries. A manager must sign in to receive payments from the driver.

**Display Options Group Box**

Use the Display Options group box to determine the font size to use for customer names and orders.

**Customer Selection Font** — Determines the size of letters the system uses to display customer names in the Select Customer screen, resulting from a search in the delivery database.

**Delivery Screen Font** — Determines the size of letters the system uses to display orders and order status in screens that display lists of delivery orders.

**External Application Group Box**

Use the External Application group box to run an external application with a button on the Customer Lookup screen, the button text, path of the application, and whether to pass the customer ID across.

**Use External Application** — Enables the Aloha system to launch a third-party program. You can use this setting to cause an external accounting program to open.

**Button Text** — Specifies the text to appear on the external application program button. Use the ‘\n’ string to break the button text into multiple lines, as required. For example, type ‘Top\nBottom,’ to get these two words to appear on two separate lines on the button, with the first word above the second word.

**Path** — Specifies the drive letter and path to the specific program file that launches the third-party program, including the name of the program file, and any command-line arguments required by the program. Use double-quotes to enclose the contents of this text box, if necessary to facilitate the operation of the program.
Pass Customer Id — Causes the Aloha system to pass customer ID information to the third-party program. Use this feature, if required by the third-party program.

Delivery Orders Tab

Use the Delivery Orders tab to provide additional configuration refinements to the system, such as the way you want to handle cash, and any discounts you want to award to delivery customers. This tab contains numerous settings that relate to the Delivery function, but not all are required to make Delivery/Frequent Buyer and the Aloha system work together. If you have bonus plans in D/FB that refer to promotions in the Aloha system, you must select them in the ‘Award Selected Discounts’ group box. Select the Delivery Orders tab from the Delivery group.

Driver Cash Account Posting Group Box

Use the Driver Cash Account Posting group box to designate petty cash accounts for cash in and cash out transactions with delivery. The system accounts for cash disbursed to and received from drivers.

Cash In — Specifies the account to which the program credits cash returned from delivery orders.
**Cash Out** — Specifies the account from which the program deducts cash disbursed to drivers for making change while making deliveries.

**Close Delivered Orders to Cash Group Box**

Use the Close Delivered Orders to Cash group box to specify how the system closes delivery orders, when the driver returns from the delivery and signs back in to the system.

**Close Delivered Orders to Cash** — Causes delivery orders to close to cash immediately, when a driver signs in after making deliveries. If cleared, you must close delivery orders as normal.

**Cash Tender** — Specifies the tender ID to which cash is credited, when received from returning delivery drivers. Select the tender from the drop-down list. *Related Requirement:* To define a cash tender, select Maintenance > Payments > Tenders.

**Order Modes Group Box**

Use the Order Modes group box to specify the order mode for different types of orders in the restaurant. The ‘Delivery’ setting is the one most important to the Delivery function. Select an order mode for each order type, to avoid an error during operations.

**Delivery** — Defines the order mode for an order to be delivered to the customer at their location.

**Walk-in** — Defines the order mode for an order originating from a customer who entered the restaurant and placed the order in person, to wait for and pick up the order.

**Call-in** — Defines the order mode for an order originating from a customer who called on the telephone to place an order to be picked up later.

**Award Selected Discounts Group Box**

Use the Award Selected Discounts group box to define the default promotional and discount programs awarded to delivery customers, as defined in Bonus Plans in Delivery/Frequent Buyer.

*Related Requirement:* You must create one of each type of discount in Maintenance > Payments > Promotions, as coupon types of zero value. You define the value of these discounts in Delivery/Frequent Buyer, when you create an Order Count or Order Type bonus. D/FB automatically totals all purchases, and compares them to the criteria configured in the bonus plan to which the customer is assigned. When the customer earns an award, D/FB automatically applies it to the guest check.
% Off Discount — Specifies a percent-off discount to apply to delivery orders, Frequent-Buyer bonuses, or both.

$ Off Discount — Specifies a specific dollar amount discount to apply to delivery orders, Frequent-Buyer bonuses, or both.
Gift Card/Certificate Sales

Use the Gift Card/Certificate Sales group to establish the type of gift cards or gift certificates you will be selling. The Aloha system supports the following types:

- Basic Gift Certificates
- Aloha Gift Certificate Manager
- Aloha eCard
- Fifth Third Bank
- PaymenTech
- Stored Value Systems
- ValueLink

Basic Gift Certificates is an internal feature within the Aloha system used to track paper gift certificates. The Basic Gift Certificates feature does not require a security key license.

Aloha Gift Certificate Manager is an Aloha BackOffice product and requires a security key license. You can set the rules for gift certificates in advance, making it easier to sell and redeem them. There is no need for forms or manual design and it lets you create or inventory preprinted gift certificates easily. The system tracks each certificate you issue and redeem to reduce the risk of missing certificates and compromising security.

Refer to the Aloha Gift Certificate Manager User Guide for more information on configuring and using gift certificates.

Aloha eCard is a feature of the Aloha Enterprise product to sell and redeem plastic gift cards. It provides an extensive list of features, such as providing the ability to overpay when redeeming, requiring employees to enter gift cards with a mag card reader, and more. With Aloha eCard, you do not need a credit card processor to transfer transactions.
Fifth Third Bank is used as a host to sell and redeem plastic gift cards, as well as its own credit card processor. It provides a variety of features for gift cards, such as entering a range of gift cards using the Range feature, offline transactions, and more.

Refer to the Fifth Third Bank Gift Cards Feature Focus Guide for more information on configuring and using Fifth Third Bank gift cards.

Paymentech is used as a host to sell and redeem plastic gift cards, as well as its own credit card processor. It provides a variety of features for gift cards, such as entering a range of gift cards using the Range feature, offline transactions, and more.

Refer to the Paymentech Gift Cards Feature Focus Guide for more information on configuring and using Paymentech gift cards.

Stored Value Systems is used as a host to sell and redeem plastic gift cards, as well as its own credit card processor. It provides a variety of features for gift cards, such as supporting offline transactions.

Refer to the Stored Value Systems Gift Cards Feature Focus Guide for more information on configuring and using Stored Value Systems gift cards.

ValueLink is used as a host to sell and redeem plastic gift cards, using either the CES (First Data South) or Nabanco (First Data North) credit card processors. It provides a variety of features, such as enabling preauthorization, offline transactions, and more.

Refer to the ValueLink Gift Cards Feature Focus Guide for more information on configuring and using ValueLink gift cards.

Use the options in the Gift Card/Certificates group to define:

- The gift card type to use at your restaurant.
- Whether employees must use a mag card to enter gift card sales.
- The Activate Range feature, if supported by the card.
- The gift certificate program to use at your restaurant.
• The number of vouchers to print when you redeem gift cards, and the text to display on them.
• The masking requirement to use.

To access the Gift Card/Certificate Sales group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select Gift Card/Certificate Sales from the ‘Group’ drop-down list.

The Gift Card/Certificate Sales group provides the following tabs: Gift Card Sales, Gift Certificate Sales, and Printing Properties.

**Gift Card Sales Tab**

Use the Gift Card Sales tab to determine whether you sell gift cards or gift certificates at your restaurant, and define the gift card type, if you must use magnetic stripe cards, and if the card supports the Activate Range functionality. Select the Gift Card Sales tab from the Gift Card/Certificate Sales group.

![Figure 2-64 Store Settings - Gift Card/Certificate Sales - Gift Card Sales Tab](image)

**Use Gift Card Sales** — Activates the use of gift cards at your restaurant.
Use Gift Certificate Sales — Activates the use of gift certificates at your restaurant.

Select Gift Card Host — Specifies the gift card host and type you accept at your restaurant.

Use Mag Card Only — prevent the employee from manually entering a gift card number when they sell a gift card. The system prompts for a manager password when the employee attempts to manually enter the number. Related Option: To override this option for certain employees and allow them to enter the gift card number without manager approval, select ‘Manual Card#’ in Maintenance > Labor > Access Levels > Financials tab, and assign the access level to the employee.

SVS Redemption Group Box

Use the SVS Redemption group box to associate the store number for offline transactions, when using Stored Value Systems gift cards.

Store # — Holds the unit number of the store, when using Stored Value Systems gift cards. Required Option: This is used in conjunction with ‘IVR Phone #’ in Maintenance > Payments > Type tab.

Quantity Sales Options Group Box

Use the Quantity Sales Options group box to use the Activate Range functionality and sell a range of gift cards in one transaction, thereby reducing the transaction fees charged by the host. If these options are disabled, the gift card does not support the Activate Range functionality.

Prompt for each card number — Requires you to sell gift cards in the FOH by entering each card number one card at a time.

May activate a range of cards. Prompt for 1st card number only — Enables you to sell a range of cards in the FOH by entering the first card number in a series and a quantity. The system sends a request for the card and all cards following it, based on the quantity. Related Option: This option is disabled if you select ‘Prompt for each card number.’

May activate a range of cards. Prompt for 1st and last card number — Enables you to sell a range of cards in the FOH by entering the first card and then the last card number in a series. The system sends a request for all card numbers between, and including, the first and last card. Related Option: This option is disabled if you select ‘Prompt for each card number.’
Maximum Cards per Range — Specifies the maximum number of cards in a range that you can sell.

**Gift Certificate Sales Tab**

Use the Gift Certificate Sales tab to specify the type of gift certificates your restaurant uses. Select Gift Certificate Sales from the Gift Card/Certificate Sales group.

![Figure 2-65 Store Settings - Gift Card/Certificate Sales - Gift Certificate Sales Tab](image)

**Gift Certificate Type** — Specifies the gift certificate type you accept at your restaurant.

- **Aloha Gift Certificate** enables gift certificates sold natively from the Aloha system.
- **Back Office Gift Certificates** enables gift certificates sold using Aloha Gift Certificate Manager.
Printing Properties Tab

Use the Printing Properties tab to define requirements for printing gift cards and gift certificates, such as the number of voucher copies to print, the tip line, and gift card number masking options. Select Printing Properties from the Gift Card/Certificate Sales group.

Number of Voucher Copies — Denotes the number of vouchers you want to print for each gift card redemption. The number you select determines the number of corresponding voucher text boxes that appear.

Voucher 1 - 4 — Holds the text to print on each gift card voucher in separate ‘Voucher’ options. Common examples are ‘Customer Copy’ and ‘Restaurant Copy.’

Print Check Message on Vouchers — Prints additional text on each voucher.

Print Large Text on Vouchers — Prints the voucher text in large fonts.

Print Tip Line — Includes a line at the bottom of the voucher so the guest can add gratuity.
Print Sold B.O. Certificates on Close Check — Includes sold BackOffice certificates when you close and print the guest check.

Print Sold/Void Details on Checkout — Includes a detailed list of gift cards or gift certificates sold and voided on the checkout report.

Mask — Determines the portion of the gift card to print on the voucher. All other numbers are masked and do not print for the guest. Select from ‘None - Always show full number,’ ‘Except last 4 digits except on 1st voucher,’ and ‘Except last 4 digits on all vouchers.’
Quick Count

The Quick Count group enables you to define requirements for Quick Count, and to build the projections database. This group is only listed if you are set up to use Quick Count, which is an Aloha add-on. Aloha Quick Count is a simple inventory and reporting package, allowing you to track items and usage on a daily basis. Features like opening counts, add, usage, and waste rate tracking, as well as a complete reporting package, enable you to manage your operation more efficiently and effectively.

Refer to the Quick Count Feature Focus Guide for more information on configuring and using the Quick Count add-on.

In this section you can define such things as the following:

- Configure the system to use Quick Count and determine if the system rolls over count totals, and auto-calculates the opening count.
- Enable projection reports and define the number of weeks to project.
- Build and update the internal projections database.

To access the Quick Count group, select Maintenance > Store Settings. The Store Settings function tab appears with Order Entry as the default group. Select Quick Count from the ‘Group’ drop-down list.
Quick Count Options Tab

Use the Quick Count Options tab to enable the Quick Count functionality and define such things as rollover counts, and the printing of the waste chits and projection reports.

Enable Quick Count — Activates the Quick Count functionality. **Related Option:** This option enables all options on the Quick Count Options tab.

Rollover Count Totals — Designates all count totals to roll over to opening counts for the next day, when the EOD runs. For example, if you have 10 Waste counts when the EOD runs, then the following day you will have 10 waste counts again. **Related Options:** If you select both ‘Rollover Count’ and ‘Auto Calculate,’ the system performs the Rollover Count function, unless you manually enter the closing counts in the FOH. If you manually enter the closing counts, they become the opening counts for the next day.

Auto Calculate Opening Count — Calculates closing counts for the current day, and the closing counts become the opening counts for the next day, when the EOD runs. **Related Options:** If you select both ‘Rollover Count’ and ‘Auto Calculate,’ the system performs the Rollover Count function, unless you manually enter the closing counts in the FOH. If you manually enter the closing counts, they become the opening counts for the next day.
Print Waste Chits — Prints a chit when you enter a waste count on the FOH and press Update.

Enable Projection Reports — Activates projection reporting and gives you the ability to view them on the FOH. You must add the available buttons to a panel to display on the FOH.

Number of Weeks to Project — Indicates the number of past weeks to use when calculating sales projections.

Minimum Time Interval to Project (in minutes) — Indicates the minimum time interval in which you want the system to calculate the FOH report. The system displays the number of items sold in the specified time interval. Select from 5, 15, 30, or 60 minutes. The smaller the interval, the longer it takes the system to build the database. We recommend setting the minimum time interval to a low number, such as 5, even though it might take longer to build. You cannot change the time interval in the FOH to a smaller interval than the interval specified in this check box.

Build Projections DB — Creates or updates the projections database to use for Quick Count. For each projected item, the projections database includes a summary of sales per the defined interval.

Click Yes to build projections, or click No to cancel the operation. Upon selecting Yes, the EOD process updates the Projections database each day with new sales information. You only need to rebuild this file when you define new tracking items to include in the report, or if you modify ‘Number of Weeks to Project’ or ‘Minimum Time Interval to Project.’

The system uses the Prjt.dbf and the Prjc.dbf files located in the \Data directory to create projection reports. Store these two files in the \Data directory only.
Video Group

Use the Video group to define remote display system setup and display options. This group will only be listed if you are set up to use remote display systems. Aloha RDS can complement or replace remote order or chit printing in the kitchen or food preparation areas. Menu items that employees enter in the FOH can automatically display in the kitchen or other food preparation areas within seconds. You can assign items on order to more than one preparation area, depending on the restaurant’s preference. After preparing an order, employees in the kitchen or preparation area can bump orders off the video screen by using a connected keypad or bump box. You can recall bumped orders as needed.

Refer to the Interfacing Video Display Systems with Aloha User Guide for more information on configuring and using remote display systems.

Use the options in the Video group to define:

• The number of seconds before an order becomes an aged order, and when an aged order becomes an old order.
• Color and text attributes to associate with certain item types, such as the aged order background, voided items, modifier codes, and the summary order background.

To access the Video group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select Video from the ‘Group’ drop-down list.

The Video group provides the following tabs: Video Setup and Display Options.
Video Setup Tab

Use the Video Setup tab to control the behavior of the video monitors that you use in place of, or along with, chit printers. Select Video Setup from the Video group.

Use Video — Enables the use of video screens in place of, or in addition to, printers. Ordered items will display on designated video screens. You must select this option for the video system to work.

Order Aging Group Box

Use the Order Aging group box to define the number of seconds before an order becomes an aged order and an aged order becomes an old order.

Seconds to Aged Order — Defines how long an order displays on the screen before it is considered an aged order. This is important because aged orders can display in a certain color to alert the kitchen that the order has been sitting on the screen too long.
**Seconds to Old Order** — Defines how long an order displays on the screen before it is considered an old order. An old order is considered older than an aged order. An old order can also be set up to display in a different color than either the current or aged orders.

**Video Automation Group Box**

Use the Video Automation group box to define the number of seconds before an order bumps and is removed from the video screen.

**Seconds Until Auto Bumping** — Indicates the number of seconds before the POS system automatically bumps a sent check from a video screen. (The system pushes back, or bumps, sent checks when there is no action taken on the check.) Once an order has been bumped, it can be recalled, unless it has already been deleted. This is disabled if set to ‘0’.

**Seconds Until Auto Deleting** — Indicates the amount of elapsed seconds before the POS system completely removes a check from a video screen. The system stores up to 16 bumped orders at all times. This setting does not go into effect until the 17th bumped order is stored. This is disabled if set to ‘0’.

**Sound Group Box**

Use the Sound group box to determine when the system sounds a beep with video.

**Beep only when items are displayed** — Enables the video display system to beep only when an order containing items configured to display in a video group actually appears on the video screen. For example, if the video screen displays six cells, and the seventh order in the queue contains items configured with a video group, then the system beeps once you bump a previous order and the seventh order appears on the video screen.
Display Options Tab

Use the Display Options tab to set up volume levels, window location and area, and color options. Select Display Options from the Video group.

**Consolidate Items on Video** — Combines similar items together and displays the appropriate quantity needed. If cleared, similar items display individually. You can consolidate items displayed on the video screen they have identical modifiers. These items can be automatically combined, and a count can be displayed to the left of the item. This setting is optional and is configurable.

If a similar item is modified, the item displays separately from the other items.

**Sort Items by Priority** — Displays menu items or tracking items sorted according to their priority. **Related Options: 1) To assign a priority to an item, select a priority in Maintenance > Menu > Items > Item tab. 2) To assign a priority to a tracking item, select a priority in Maintenance > Menu > Quick Count > Tracking Items.**
**Show Cleared Items on Video** — Displays items employees clear from the order.

**Indicate Changed Items on Video** — Causes changed items on the video screen to display using the text attributes, color options, and a specified indicator. A changed item occurs when you modify or delete an item after you initially enter the item. **Required Option:** You must select ‘Changed Items Text’ or ‘Changed Items Background’ from the ‘Item Type’ drop-down list in Color Options, click Define, and select a text attribute or color. **Related Option:** If you select ‘Consolidate Items on Video,’ any like item consolidates on the video as one line item, and if one of these items are changed, the line item inherits the changed item display.

**Manually route modifiers** — Displays modifier items to the queue designated in Maintenance > Menu > Items > Miscellaneous tab, only if the menu item it is modifying has the same queue designation. If cleared, modifiers display in every queue in which the menu item displays.

**Show Volume Level** — Permits the current volume level to display on the status bar at the bottom of the video monitor screen. Volume levels are set through Maintenance > System > Volume Level in Aloha QuickService only. The volume level number represents the level of sales volume so the kitchen will know when they need to prepare more food.

**Cannot Bump from FOH Until Check Closed** — Allows you to bump orders from the video screen only if the check is closed. Items routed to separate video screens are also bumped and removed from the screen. **Related Requirement:** The function applies only if you use the ‘Bump Order’ button function in Maintenance > Menu > Panel Editor.

**Wraparound Modifiers Group Box**

Use the Wraparound Modifiers group box to determine how modifiers display and wrap on the video screen.

**One Line per modifier** — Displays one line per modifier under the item being modified in video cells. This setting is the default for normal operations.

<table>
<thead>
<tr>
<th>Table 12</th>
<th>1:52:00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burger</td>
<td></td>
</tr>
<tr>
<td>LT</td>
<td></td>
</tr>
<tr>
<td>TOM</td>
<td></td>
</tr>
<tr>
<td>ON</td>
<td></td>
</tr>
<tr>
<td>MST</td>
<td></td>
</tr>
<tr>
<td>AM CHZ</td>
<td></td>
</tr>
</tbody>
</table>
**Contiguous, on same line as item** — Displays modifiers as one single line along with the item being modified. The modifiers wrap on to the next line with an indentation on the order cell and do not wrap on the summary cell. *Related Options: 1)* This option enables the ‘Tab Stop’ option. 2) Modifier items with ‘Print Independently’ selected in Maintenance > Menu > Items > Print display on a separate line.

<table>
<thead>
<tr>
<th>Table 12</th>
<th>1:52:00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burger LT TOM ON MST</td>
<td></td>
</tr>
<tr>
<td>AM CHZ</td>
<td></td>
</tr>
</tbody>
</table>

**Contiguous, on next line following item** — Prints modifiers as one single line under the item being modified. The modifiers wrap on to the next line with an indentation on the order cell and do not wrap on the summary cell. *Related Options: 1)* This option enables the ‘Tab Stop’ option. 2) Modifier items with ‘Print Independently’ selected in Maintenance > Menu > Items > Print display on a separate line.

<table>
<thead>
<tr>
<th>Table 12</th>
<th>1:52:00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Burger</td>
<td></td>
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<tr>
<td>LT TOM ON MST</td>
<td></td>
</tr>
<tr>
<td>AM CHZ</td>
<td></td>
</tr>
</tbody>
</table>

**Tab stops** — Specifies the number of characters used to separate each modifier. *Required Options:* You must select either ‘Contiguous, on the same line as item’ or ‘Contiguous, on next line following item’ to enable this option.

**Color Options Group Box**

The Color Options group box allows you to use a color to indicate different states of the order, and special instructions.
**Item Type** — Determines the type of item for which you are defining the color options and attributes. Select the item type from the drop-down list.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Total Text</td>
<td>The text on the video screen that displays the check total.</td>
</tr>
<tr>
<td>General Text</td>
<td>The text on the video screen that is not an item or a modifier.</td>
</tr>
<tr>
<td>Items</td>
<td>Any menu item displaying on the video screen.</td>
</tr>
<tr>
<td>Modifiers</td>
<td>Any modifier or modification to an item entered without the use of a modifier code.</td>
</tr>
<tr>
<td>Tracking Item Text</td>
<td>Any item defined as a tracking item using the Aloha Quick Count add-on.</td>
</tr>
<tr>
<td>Changed Item Text</td>
<td>The text on the video screen for items that you modify or delete after they initially appear on the screen. You can also type up to three characters for an indicator to appear on the screen for changed items. The indicator precedes the item text when the item has changed.</td>
</tr>
<tr>
<td>Voided Items Text</td>
<td>Any item voided during ordering.</td>
</tr>
<tr>
<td>Aged Order Background</td>
<td>The background display of a cell that contains an aged order. An aged order is one that has been on the screen longer than the number defined in the ‘Seconds to Aged Order’ text box.</td>
</tr>
<tr>
<td>Bumped Order Background</td>
<td>The background display of a cell that contains a bumped order. A bumped order is one that has been moved off the screen using a bump bar or keyboard.</td>
</tr>
<tr>
<td>Changed Item Background</td>
<td>The background display of a line item containing a changed item.</td>
</tr>
<tr>
<td>Check Total Background</td>
<td>The background display of the line item containing the check total.</td>
</tr>
<tr>
<td>Finalized Order Background</td>
<td>The background display of a cell that contains a finalized order. A finalized order is an order that has been ‘sent to the kitchen’ for preparation.</td>
</tr>
<tr>
<td>New Order Background</td>
<td>The background display of a cell that contains a new order. A new order is an order that has been entered on the system but has not been finalized. This gives the kitchen an idea of what they have to prepare.</td>
</tr>
</tbody>
</table>
Define Button — Access the Define Color Options dialog box to associate a color to the item type and other attributes.

<table>
<thead>
<tr>
<th>Item Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old Order Background</td>
<td>The background display of a cell that contains an old order. An old order is one that has been on the screen longer than the number defined in the ‘Seconds to Old Order’ text box.</td>
</tr>
<tr>
<td>Preview Order Background</td>
<td>The background display of a cell(s) containing orders that are not assigned or are unbalanced.</td>
</tr>
<tr>
<td>Summary Order Background</td>
<td>The background display of a cell(s) that contains the summary information.</td>
</tr>
<tr>
<td>Voided Items Background</td>
<td>The background display of the line item containing a voided item.</td>
</tr>
</tbody>
</table>

**Old Order Background**

The background display of a cell that contains an old order. An old order is one that has been on the screen longer than the number defined in the ‘Seconds to Old Order’ text box.

**Preview Order Background**

The background display of a cell(s) containing orders that are not assigned or are unbalanced.

**Summary Order Background**

The background display of a cell(s) that contains the summary information.

**Voided Items Background**

The background display of the line item containing a voided item.

**Define Button** — Access the Define Color Options dialog box to associate a color to the item type and other attributes.

![Define Color Options](image)

*Figure 2-71 Define Color Options*

**Intensify** — Displays the selected display item in a brighter or more intense color. The normal 16 bit color display is changed to a 255 bit color display.

**Reverse** — Displays the selected display item in reverse. For example, black text would display as white text. A white background would display as a black background.

**Blink** — Causes the selected display item or background to blink while being displayed on the video screen.

**Indicator** — Displays up to three characters of text before the line item. For example, enter DEL to display before each voided item. This option is not available for general text or any of the cell backgrounds.
**Hotel**

Use the Hotel group to define Property Management System (PMS) settings. This group is only listed if you are set up to use the PMS Interface. The PMS Interface was developed specifically for the hospitality industry to increase the power of Aloha so it is dynamically linked to a hotel’s property management system (PMS). When PMS Interface is installed, the Aloha EDC program is automatically installed on the system to assist the Aloha POS system communicate with the hotel’s PMS system. This enables hotel restaurants and cafeterias using an Aloha POS system to inquire about a hotel guest’s status, and to charge orders to a room pending hotel approval.

Refer to the Interfacing PMS with Aloha User Guide for more information on configuring and using PMS.

Use the Options in the Hotel group to define:

- The PMS type you are using.
- The PMS timeout value and the number of voucher copies to print.

To access the Hotel group, select Maintenance > Store Settings. The Store Settings function displays with Order Entry as the default group.
Select Hotel from the ‘Group’ drop-down list.

**Use Property Management System (PMS)** — Enables the PMS interface and activates the remaining options on the subtab.

**PMS Type** — Designates the property management system in which to interface. Aloha currently supports the following property management systems:

- Aloha PMS
- CSS
- Encore
- Fastech Meal Accountability
- Fidelio
- Generic Micros 4700
- HIS
- HIS Preauth
- Marriott
- RDP
- Springer Miller

If you select Fastech as the PMS vendor, the PMS response text prints on the guest check. The PMS response contains the new account balance, including current guest checks.

**Number Of Sales Categories** — Specifies the number of PMS sales categories you want to use to report sales.

**PMS Timeout** — Designates the number of seconds to wait for a response from the PMS system. Enter the desired time limit in seconds with 30 seconds as the default.

**REQ Timeout** — Specifies the number of seconds to wait for a response from the PMS to rename the .req file to an .ans file for a faster offline response. When the Req timeout value lapses, the PMS timeout begins. Typically you would set this Req timeout value lower than the PMS timeout value.

**Number of Vouchers Copies** — Designates the number of vouchers to print. This setting controls the number of vouchers to print when you make adjustments or authorizations to the PMS payment, but not when you delete a PMS payment.

**Report revenue center sales from where check originated** — Indicates sales for the check are reported under the revenue center which the sale originated. For example, if a check originates in the bar and is later transferred to the dining room, the sales for the check report under the bar revenue center.

**Offline Printer** — Specifies the printer in which you want to print receipts when the POS cannot connect to the PMS system. *Related Requirement:* To define a printer, select Maintenance > Hardware > Printers.
Survey

Use the Survey group to provide managers the ability to do selective customer call-in surveys via guest check. It is available for an additional cost and requires a new security key code.

Refer to the Customer Surveys Feature Focus Guide for more information on configuring and using surveys.

To access the Survey group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select Survey from the ‘Group’ drop-down list.

Use Survey — Enables a restaurant to print a customer call-in survey on the guest check. A custom banner and message print on each guest check. The banner prints directly below the check header information and above the menu items. The message prints after the menu items and before the first subtotal line. Related Requirement: Access Maintenance > System > Survey to define the banner and message to print on the guest check.
**Code indicates employee worked less than ___ days** — Indicates the number of days at which you consider an employee to be experienced and trained, based on the date of business of the restaurant against the hire date of the employee. Entering the default value of 0 days indicates all employees are considered experienced. **Related Option:** Works in conjunction with the tenth digit of the ‘Survey Code Output’ located in Maintenance > System > Survey. If the employee has been with the company less than the defined number of days, the tenth digit is 0 or 1, indicating the employee is new. If the employee has been with the company more than the defined number of days, the digit is 2 or 3, indicating the employee is considered experienced.
Token Distribution

Use the Token Distribution group to define requirements for token dispensers. The Token Interface enables you to automatically dispense tokens based on the sales amount the guest purchases. With the Token dispensing hardware and Aloha security key access, it is easy to interface through the touch screen terminal and distribute the correct amount of tokens. There is no need to calculate the number of tokens because the Aloha system does it for you.

The Token Interface feature works in conjunction with the Package Promotion feature. Refer to the Token Distribution and Package Promotion Feature Focus Guides for instructions on configuring Package Promotions.

You can also define what appears on the Front-of-House (FOH) messages, which helps you in troubleshooting and provides guidance when the TODD Token hardware stalls or is not operating correctly. Additionally, you can define the number of seconds to wait before the messages appear.

The system calculates the number of tokens to dispense on a variety of levels, starting with a global setting that affects all items across the board. You can alter the calculation at the item level and the promotion level to override the number of tokens to dispense.

Use the options in the Token Distribution group to define:

- The use of token dispensers and the amount of sales guests must order to receive a token.
- Messages to display when the machine is dispensing, empty, jammed, and paused.
- Values for when the machine times out.

To access the Token Distribution group, select Maintenance > Store Settings. The Store Settings function appears with Order Entry as the default group. Select Token Distribution from the ‘Group’ drop-down list.

The Token Distribution group provides the following tabs: Distribution, Message, and Controller.
Distribution Tab

Use the Distribution tab to activate the token distribution dispenser and define how much guest must spend to receive a token. Select Distribution from the Token Distribution group.

*Figure 2-74  Store Settings - Token Distribution - Distribution Tab*

**Use Token Distribution** — Activates the Token Distribution function.

**For every ____ a customer spends, distribute 1 token to the customer** — Specifies the dollar amount the guest must spend to receive a token. The formula is based on the subtotal of items and rounds down to the next whole dollar.
**Message Tab**

Use the Message tab to define message prompts to display on the FOH when certain actions occur with the token dispenser. Select Message from the Token Distribution group.

*Dispensing* — Displays the message prompt to appear when the dispenser is dispensing tokens, such as ‘Token dispensing.’

*Empty* — Displays the message prompt to appear when the dispenser is empty, such as ‘Please check token dispenser. It may empty.’

*Jammed* — Displays the message prompt to appear when the dispenser is jammed, such as ‘Please check token dispenser for possible jam.’

*Paused* — Displays the message prompt to appear when the dispenser is pausing, such as ‘Please remove all tokens from coin holder.’

*Next Guest* — Displays the message prompt to appear when the dispenser is ready for the next guest, such as ‘Please place cup for next guest.’
Controller Tab

Use the Controller tab to define the maximum number of seconds for the timeout and jam preset values, and the number of tokens to dispense before displaying the pause message. Select Controller from the Token Distribution group.

Figure 2-76 Store Settings - Token Distribution - Controller Tab

**Timeout** — Defines the maximum number of seconds to wait before signaling that the dispenser is out of tokens.

**Jam Preset** — Defines the maximum number of seconds before signaling that the dispenser is jammed.

**Pause after dispensing ___ Tokens** — Defines the number of tokens to dispense before displaying the ‘pause message.’ This allows you to remove one cup and put in a different cup.
Labor Maintenance Functions

This chapter explains how to create and maintain employee files, job codes, access levels, and other labor related settings.

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   Tax Tab........................................................................................ 3-12
   Back Office Security Tab ............................................................. 3-14
Job Codes....................................................................................... 3-16
   Job Code Tab .............................................................................. 3-17
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This section discusses the preparation of Labor settings in the Aloha system, and establishes employee and job code information, security access levels, performance measures, and more. Labor is the backbone of a restaurant and must follow certain state and federal regulations. The settings described in this chapter determine functions an employee can perform and restrictions placed on the employee.

Select Maintenance > Labor to access the Labor menu.

Figure 3-1 Labor Menu

Use the options in the Labor functions to:

- Enter and edit employee information.
- Assign, enter, and edit job codes.
- Establish access levels for job codes.
- Establish labor groups.
- Define performance measures.
- Establish termination reasons.
- Establish back office security levels and define the functions each security level can access.
- Define other wage types for the administration of paid time off (PTO).
Employees

The Employees function tab contains all pertinent data on current and past employees. Use this function to enter, edit, or delete employees, as well as to maintain various settings and records for the employee. Due to certain state laws and labor codes, always terminate employees instead of deleting them from the Aloha system.

**Number** — Holds the employee’s name and a unique number that identifies each employee. Use this number to log in to the Aloha Front-of-House and to perform certain functions that require approval to continue. When using the employee number to log in to the FOH system, all leading zeroes must be entered. **Related Option:** To add and specify password requirements to log in to the FOH, select from the options in Maintenance > Store Settings > Security group > POS Password Settings tab. For example, if the number of employee digits is set to four, an employee that has been assigned an employee number of 0523, must enter 0523 in the login screen, not 523.

To add a new employee, enter an unused number from 0001 to 9,999, and press Enter. Create employee numbers in a designed numbering system for organization and manageability. One suggestion is to group employee numbers by their job functions:

- 0100—0199 Management positions
- 0200—0499 Counter staff
- 0500—0599 Prep employees
- 0600—0799 Kitchen employees
- 0800—0899 Other employees
- 0900—0999 Training positions

The Employees function provides the following tabs: Employee, Job Codes, Zap, Delivery, Tax, and Back Office Security.
Employee Tab

Use the Employee tab to enter general employee information, such as the social security number, name, and address. Select Maintenance > Labor > Employees to display the Employees function.

Social Security — Denotes the nine-digit employee social security number. Hyphens are entered by the system when you advance to the next setting.

Last Name — Holds the employee’s last name. The last name appears on most of the FOH and BOH reports.

First Name — Holds the employee’s first name.

Middle — Holds the employee’s middle name.

Nickname — Designates the name printed on the chit and guest check. Use this setting for employees who do not want their real name shown to customers. If left blank, the employee’s first name is used.
**Birthdate** — Holds the employee’s date of birth. Type as mm/dd/yyyy. If you type the employee birthdate, the system greets the employee with a happy birthday message, when that person logs in on their birthday.

**Start Date** — Holds the date the employee began working. Type as mm/dd/yyyy. This is not necessarily the first day the employee worked.

**Export ID** — Contains the employee identification number recognized by a third party software for electronic payroll processing. For example, type the employee ADP number when interfacing with ADP.

**Address** — Represents the employee’s home address.

**City/Town** — Represents the city in which the employee lives.

**State** — Represents the state in which the employee lives.

**Postal Code** — Represents the zip code or Canadian postal code for the employee’s home address.

**Telephone** — Accepts a standard seven-digit telephone number. Enter all ten digits for the phone number and area code.

**Prefers Qwerty Keyboard** — Designates the employee receives the standard QWERTY typewriter keyboard on order entry touch screens, and used for data entry, such as typing the name for a bar tab. Clear the check box to display an alphabetic keyboard layout.

**Must use Mag Cards** — Forces the employee to use a magnetic card when logging in to the FOH, and when accepting credit cards for payment. The employee cannot manually enter their password or credit card numbers. **Related Option:** Do not select this option if you select ‘Must Use Fingerprint Scanners.’

**Mag Card Password Button** — Click Mag Card Password to assign a mag card to an employee. You have the option to update mag cards in the FOH immediately, or after the next system refresh.

**Must use Fingerprint Scanner - Clock In** — Requires the employee to place their thumb or finger on the scanner hardware for identification to clock in. Use this option for employees who must clock in, but do not enter orders, such as kitchen staff. You can use fingerprint scanners with mag card readers.
**Must use Fingerprint Scanner - Log In/JIT** — Requires the employee to place their thumb or finger on the scanner hardware for identification to log in. Use this option for order entry employees who log in frequently and managers who must approve certain functions. You can use fingerprint scanners with mag card readers.

**To add magnetic card information for an employee:**

1. Click **Must Use Mag Cards** to force the employee to use a mag card with the Aloha system. Mag cards can be used even if ‘Must Use Mag Cards’ is cleared.
2. Click **Mag Card Password**. The Read Magnetic Card dialog box appears.

![Figure 3-3 Read Magnetic Card Dialog Box](image)

3. Swipe the employee’s **mag card**. You are prompted to re-swipe the mag card to confirm the number.

![Figure 3-4 Repeat Mag Card Swipe](image)
4. Re-swipe the employee’s **mag card** for confirmation. The Update FOH Now message box appears.

![Real Time Update]

*Figure 3-5  Update FOH Now Message Box*

5. Click **Yes** to update the FOH with the mag card information immediately. The employee can now use the mag card to log in to the FOH. Click **No** to update the FOH upon the Refresh Data.

**Job Codes Tab**

Use the Job Codes tab to assign job codes, access levels, and pay rates to an employee. Job codes describe what an employee can do and access levels determine if an employee can do it. Pay rates display only on selected reports. Select the Job Codes tab from the Employees function.

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You must define job codes and access levels on their respective function tabs before assigning them to an employee. These are discussed in detail later in this chapter.
**Job Codes** — Determines the set of functions the employee performs. Assign up to 10 job codes for each employee. Use these lists for employees with several job positions. Select the job codes, in descending order, starting with the most used job code first. If you need to add or modify a job code, click Job Codes to access the Job Codes function. When you modify a job code, the change applies to all employees assigned to that job code.

**Access Levels** — Determines the set of functions the employee can perform without manager intervention. Select the access level to associate with the corresponding job code. If you need to add or modify an access level, click Access Levels to access the Access Levels function. When you modify an access level, the change applies to all employees assigned to that access level.

**Rate** — Holds the base-level hourly rate for the associated job code to the left. Enter the rate as a decimal number or in fractional cents.
Zap Tab

Use the Zap tab to terminate an employee in the Aloha system, enter a reason for the termination, and add comments as to why an employee is leaving. Select the Zap tab from the Employees function.

Terminated Group Box

Use the Terminated group box to specify the employee no longer works at the restaurant. You should never delete employees from a live Aloha system so you can retrieve valid data from dated subdirectories.

Terminated — Specifies the employee no longer works at your restaurant. Related Option: This option enables all options on the Zap tab.

Reasons — Identifies the reason for leaving. If you need to add or modify a termination reason, click Reason to access the Termination Reasons function. When you modify a termination reason, the change applies to all employees assigned to that termination reason.

Last Day — Holds the employee’s last date worked. Type the date in mm/dd/yyyy format.
Eligible for Rehire — Indicates the employee is eligible for rehire.

Explanation — Holds comments, such as additional reasons for leaving.

Leave of Absence Group Box

Return Date — Denotes the date the employee expects to return to work, if the employee is out for a period of time due to a leave of absence. Type the return date in mm/dd/yyyy format.

Transfer Group Box

Transfer to Unit — Contains the unit number of the reciprocal location within the company to which the employee is transferring.

Will Employee Move — Indicates the transfer requires the employee to move.

Delivery Tab

Use the Delivery tab to specify delivery fees earned by employees for deliveries, the date the employee’s driver license expires, and employee insurance expiration dates. Select the Delivery tab from the Employees function.

*Figure 3-8 Employees - Delivery Tab*
$ Driver Fee — Represents the dollar amount the employee receives for each delivery.

% Driver Fee — Represents the percentage of merchandise charges the employee receives for each delivery.

$ Mileage Fee — Represents the dollar per mile reimbursement the employee receives for each delivery.

DL Exp — Holds the employee’s driver license expiration date in mm/dd/yyyy format. It is the manager’s responsibility to monitor expired dates.

Insurance Exp — Holds the employee’s automobile insurance expiration date in mm/dd/yyyy format. It is the manager’s responsibility to monitor expired dates.

Tax Tab

Use the Tax tab to enter employee information for tax filing purposes and track additional user-definable information. Select the Tax tab from the Employees function.

![Figure 3-9 Employees - Tax Tab]
Job Status — Denotes whether the employee is Full-time, Part-time, Hourly, Salary-Exempt, or Salary-Nonexempt. The default is Full-time.

Marital Status — Specifies whether the employee is single, married, divorced, or widowed. Select None if you do not want to track this information.

Number of Dependents — Denotes the number of dependents the employee claims.

Waive “Consent” for Meal Break — Does not prompt an employee to waive their meal period break, when using the shift and break rules. An employee can sign legal documentation to always waive consensual meal period breaks, as long as the break times are still within the requirements of the shift and break rules. By selecting this option, the employee never receives the option to waive a consensual meal period break. If the condition becomes mandatory, thereby creating a penalty pay record of ‘Meal Period 1 Mandatory’ or ‘Meal Period 2 Mandatory’ in the Other Wages function, compensation is awarded automatically.

Sex Group Box

Use the Sex group box to identify the sex of the employee.

Male — Indicates the employee is male. Male is the default setting.

Female — Indicates the employee is female.

Other Employee Codes Group Box

Use the Other Employee Codes group box to track additional information, such as whether the employee is a smoker, or owns a car. Related Requirement: To define the text to appear on the tab in place of ‘Undefined code x,’ edit the Emp1Text through Emp5Text variables in the Aloha.ini file. For example, to track the number of smokers you employ, edit Aloha.ini and replace ‘Undefined code 1’ in the Emp1Text variable with ‘Smoker.’ The word ‘Smoker’ will appear in Employee Maintenance. The Aloha system does not use the information on any Aloha reports.

Undefined Code #1 through 5 — Captures additional information about the employee. Once you define the undefined employee code, the text you set in Aloha.ini becomes the text for the text box. Note: Undefined Codes 1 through 3 are not reflected in the Tax Tab example.
Back Office Security Tab

Use the Back Office Security tab to define the security level of access to logging in to the BOH. Assign security levels only to employees who perform BOH maintenance, such as managers. Select the Back Office Security tab from the Employees function.

Security Level — Determines the access the employee has to BOH functions. If you need to add or modify a Back Office security level, click Security Level to access the Back Office Security Level function. When you modify a Back Office security level, the change applies to all employees assigned to that Back Office security level.

Login Restrictions Group Box

Use the Login Restrictions group box to set a time limit on the security level. The time refers to the time interval, in 24-hour time, the selected employee is allowed to access the BOH. For example, you may type the start time as 08:30, representing 8:30 a.m., and the end time as 15:00, representing 3:00 p.m. If the start time and end time are left at 00:00, the employee can access the BOH at any time.

Start Time — Start time of day when the employee can access the BOH.
End Time — End time of day when the employee can access the BOH.

Clear Back Office Password Button — Enables you to remove the password used by an employee to log in to the BOH. The next time the employee logs in to the BOH, they receive a prompt to enter a new password.
Job Codes

Job codes are user-defined job descriptions that categorize employees and tasks into logical groupings. They describe what the employee can do. Use this function to define the tasks for each job code, as you would do when writing a job description. For example, kitchen employees typically do not have order entry privileges (the Order Entry check box is cleared).

Number — Holds the name and a unique number that identifies each job code. To add a new job code, enter an unused number from 001 to 999, and press Enter. To edit an existing job code, scroll through the ‘Number’ drop-down list, select the job code, and press Enter.

Revenue Center — Attaches a job code to a specific revenue center. Select a revenue center from the drop-down list if you need to define the Hourly Sales and Labor report on a per revenue center basis for each job code. If you need to add or modify a revenue center, click Revenue Centers to access the Revenue Center function. When you modify a revenue center, the change applies to all job codes assigned to that revenue center. **Related Option:** To report information per revenue center, select ‘Split Hourly Sales and Labor by Revenue Center’ in Reports > Sales > Hourly Sales and Labor Report.

Select Maintenance > Labor > Job Codes to access the Job Codes function. The Job Codes function tab provides the following tabs: Job Code, Quick Service, Functions, Financials, Delivery, and Breaks.


**Job Code Tab**

Use the Job Code tab to define the requirements for the job code, such as a training mode, if a password expires to log in to the FOH, if the employee uses a cash drawer, and more.

**Name** — Holds the abbreviated form, up to 10 characters, of a job title, such as Bar, Serv, and MGR.

**Description** — Holds the full name, up to 20 characters, of a job code, such as Bartender, Server, and Manager.

**Group** — Designates the two-digit number of the menu for this job code to use. Use this option in conjunction with the Event Scheduler located in Maintenance > System > Events. Assign a different number to each job code, or to group certain job codes together, assign them the same number. Then use Event Scheduler to assign specific menus to designated Job Groups. Use this feature when different job codes need to access different menus.

**Icon** — Associates a specific bitmap with a job code. Bitmaps appear on order entry terminals, and serve as a visual representation of the job code. This is particularly useful when an employee
is assigned to more than one job code. The available bitmap images are stored in the \BMP directory, labeled ‘Icon##,’ with ## representing the number to enter in this text box. You can create customized job code bitmaps for use on order entry terminals.

Figure 3-12 Installed Job Code Icons

**Export Code** — Associates a secondary job code, used by a third party software system or the labor report, with the equivalent job code in the Aloha system. This text box holds 10 characters.

**Order Entry** — Signifies that order entry screens appear for all employees clocked in with this job code, and is commonly used for servers in regards to menu assignment, events, and customer polling functionality. If cleared, employees do not have access to order entry screens and cannot ring sales or close checks. **Required Option:** You must select ‘Shift Required’ to enable this option. **Related Option:** The ‘Clock In/Clock Out not Required’ option enables, then disables this option.
Training — Indicates the selected job code is a ‘training mode’ job code. A ‘training mode’ job code allows access to all rights and menu navigation. The system records training sales in the Trans.log file but the sales do not appear in any Aloha reports or have any effect on payroll information. Training sales print only to the local chit printer. They do not open the drawer, nor do they display on a video screen or a pole display. The words ‘Training Mode’ print at the top of all guest checks and chits. Additionally, guest checks appear in green instead of blue on order entry terminals.

Shift Required — Requires all employees clocked in with this job code to clock in and clock out at the beginning and end of each shift. Related Option: This option does not enable order entry capabilities unless you also select ‘Order Entry.’

Do not Print Job Code — Prevents the job code from printing on the following reports: ADP export file, Coconut Code export file, Real World Payroll export file, Labor report, and the Overtime Warning report. Related Option: The ‘Clock In/Clock Out not Required’ option enables, then disables this option.

Can Get Checks — Allows all employees clocked in with this job code the ability to get open checks from other employees. Use this option primarily in a cashier environment where cashiers close checks opened by other employees. Related Requirement: You must access Maintenance > Menu > Panel Editor and add the Get Check button function to a panel to display on the FOH.

Ignore labor schedule — Enables all employees clocked in with this job code to clock in without being scheduled to work, in accordance with the punctuality rules. Use this option for managers and other exempt employees. Related Options: 1) To define punctuality rules, make selections in the Maintenance > Store Settings > Labor group > Scheduling tab. 2) The ‘Clock In/Clock Out not Required’ option enables, then disables this option.

Allow Item Lookup — Enables all employees clocked in with this job code to look up any item. The Item Lookup screen appears when you select the Item Lookup button. Related Option: To order the item after you look it up, select ‘Allow Add Item’ in Maintenance > Labor > Job Codes > Table Service tab. Related Requirement: You must also access Maintenance > Menu > Panel Editor and add the Item Lookup button function to a panel to display on the FOH.

Allow Add Item — Enables you to add an item after you have looked it up using the Item Lookup feature. When ordering, forced modifiers accompany the item as normal. Required Option: You must select ‘Allow Item Lookup’ to enable this option.
Allow JIT Approval without Clock-in — Enables employees with this job code to approve actions that require manager approval without being clocked in. **Required Option:** You must assign this job code as the first job code in the list for the employee in Maintenance > Labor > Employees > Job Codes.

Do Not Update Flash/Hourly Sales Report — Excludes the labor hours and dollars generated from this job code from the FOH Flash report and the BOH Hourly Sales report. You can use this option to exclude data from managers and give the report a more realistic total if their pay is defined as higher than other employees. **Related Option:** The ‘Clock In/Clock Out not Required’ option enables, then disables this option.

Clock In/Clock Out not Required — Allows employees to perform order entry functions without being clocked in. This job code and the labor hours generated with it do not appear on any FOH or BOH labor report. To properly configure the employee from having to clock in, assign this job code only to the employee. If you assign more than one job code to the employee, the system prompts the employee to clock in. The system automatically clocks in the employee and records the clock in and clock out punches for each business day. You can access these punches via the Audit report. **Related Option:** This option selects, then disables, the ‘Order Entry,’ ‘Do not Print Job Code,’ ‘Ignore labor schedule,’ and ‘Do Not Update Flash/Hourly Sales Report’ options. This option also disables the ‘Perform Checkout via Clock Out’ option and all options in the ‘Payment Declaration’ and ‘Tip Declaration’ group boxes on the Maintenance > Labor > Job Codes > Financial tab, and all options on the Maintenance > Labor Job Codes > Breaks tab.

**Cash Drawer Group Box**

Use the Cash Drawer group box to enable the job code to operate a cash drawer.

**Cash Drawer** — Allows employees clocked in with this job code, with the ability to operate a cash drawer, such cashiers. The most employees you can assign to a cash drawer is one, however, you can use public cash drawers to assign more. **Related Requirement:** You must access Maintenance > Menu > Panel Editor and add the Assign Drawer or Manage Drawers button to a panel to display on the FOH.

**Use Count Screens** — Enables all employees clocked in with this job code, to use a money counter to enter or confirm their starting bank. **Required Option:** You must select ‘Cash Drawer’ to enable this option.

**Multiple Drawers** — Enables assignment of the employee to more than one cash drawer at a time. **Required Option:** You must select ‘Cash Drawer’ to enable this option.
Password Group Box

Use the Password group box to define password usage for the job code.

**Uses Password** — Requires all employees clocked in with this job code, to use a password to log in.

**Password Expires** — Specifies the password for all employees clocked in with this job code, has an expiration time. Upon expiration, the employee must select another password for use.

**Renew after _ Days** — Specifies the number of days to lapse before a password expires and the employee must change it.

Quick Service Tab

Use the Quick Service tab to further define the functions and tasks related to a quick service environment, such as assigning order entry screens and queues, self-banking and others. Select the Quick Service tab from the Job Codes function.

*Figure 3-13  Job Codes - Quick Service Tab*
**Order Entry Screen** — Indicates the order entry screen all employees clocked in with this job code receive upon log in. If you need to create or modify an order entry screen, click Order Entry Screen to access the Screen Editor function. When you modify an order entry screen, the change applies to all job codes assigned to that order entry screen.

**Order Entry Queue** — Indicates the order entry queue all employees clocked in with this job code receive upon log in. If you need to create or modify an order entry queue, click Order Entry Queue to access the Order Entry Queue function. When you modify an order entry queue, the change applies to all job codes assigned to that order entry queue.

**Self Banking** — Assigns cash accountability to all employees clocked in with this job code, without being assigned to a specific cash drawer.

**Self Assign Drawer** — Allows all employees clocked in with this job code the ability to assign themselves to their own cash drawer. **Related Requirements:** 1) You must also access Maintenance > Menu > Panel Editor and add the Assign Drawer button to a panel to display on the FOH. 2) When you select ‘Self Assign Drawer’ in conjunction with ‘Cash Drawer,’ and only one drawer is defined for the terminal at which you are logging in, the system automatically assigns you the drawer and bypasses the drawer selection process.

**Enter Starting Bank** — Requires all employees clocked in with this job code the ability to enter a starting bank. **Related Requirement:** You must also access Maintenance > Menu > Panel Editor and add the Assign Drawer button to a panel to display on the FOH.

**No Default Screen** — Ensures all employees clocked in with this job code, are not assigned to a default order entry screen. When the employee logs into the system, the terminal’s default order screen displays. **Related Option:** To assign a default order entry screen by terminal, specify an order entry screen in Maintenance > Hardware > Terminals > General tab.

**Screen Timeout** — Defines the number of seconds of inactivity, up to 999, for employees clocked in under this job code, before the FOH times out and returns to the Floating Logo screen. Type 0 to specify no timeout is in use. **Required Option:** You must select ‘Order Entry’ on the Job Code tab to enable this option. **Related Option:** To define the screen timeout globally for all terminals, type the number of seconds in ‘Default ___ Seconds’ in Maintenance > Store Settings > User Interface group > POS tab.
Functions Tab

Use the Functions tab to configure the Rapid Access Login feature for employees to use. Select the Functions tab from the Job Codes function.

Rapid Access Group Box

Use the Rapid Access group box to define requirements for job codes using the Rapid Access Login feature.

Refer to the Rapid Access Login Feature Focus Guide for more information on implementing and using the rapid access login feature.

Use Rapid Access Login Screen — Enables multiple employees to work from the same cash drawer using the FOH rapid access single touch screen.
Financial Tab

Use the Financial tab to define checkout details for a selected job code, such as whether an employee must declare their cash at the end of a shift. Select the Financial tab from the Job Codes function.

Perform Checkout via Clock Out — Enables all employees clocked in with this job code to perform a clock out without performing a server checkout. Use this option for environments that use drawer checkouts. If configured, the employee must still perform any other checkout functions, such as coupon audit, tipshare, and more. Related Options: 1) This option disables the ‘Must Declare at Checkout’ option and all options in the Payment Declaration group box located on the same tab. 2) The ‘Clock In/Clock Out not Required’ option in Maintenance > Labor > Job Codes > Job Code tab enables, then disables this option.

Manager must checkout — Requires all employees clocked in with this job code to have manager authorization to check out. The manager approval screen appears when the employee selects the Checkout button. Related Option: To allow an employee to approve checkouts, select ‘Approve Checkout’ in Maintenance > Labor > Access Levels > Employee tab and assign the access level to the employee.

Figure 3-15 Job Codes > Financial Tab
**Must Declare at Checkout** — Requires all employees clocked in with this job code to declare payment counts upon checking out for over/short calculations and activates the remaining options in the group box.

**Manager must clockout** — Requires all employees clocked in with this job code to have manager authorization to check out. The manager approval screen appears when the employee selects the Checkout button. **Related Option:** To allow an employee to approve clockouts, select ‘Approve Clockout’ in Maintenance > Labor > Access Levels > Employee tab and assign the access level to the employee.

**Must Declare Tips** — Requires all employees clocked in with this job code to declare tips upon clocking out. The FOH Enter Tips screen appears when you touch the Clock Out button.

### Payment Declaration Group Box

Use the Payment Declaration group box to specify reconciliation requirements for employees clocked in with this job code. **Related Option:** The ‘Clock In/Clock Out not Required’ option in Maintenance > Labor > Job Codes > Job Code tab enables, then disables this option.

**Declare Cash Only** — Requires all employees clocked in with this job code to declare cash only upon checking out for over/short calculations. All other tender types are not required. The Aloha Cash Owed Report includes all employees who ring sales, regardless if you select this check box, however, **** prints for employees who are not required to declare cash.

**Reconcile All Tenders** — Requires all employees clocked in with this job code, to reconcile all cash and non-cash tenders at the end of each shift.

Refer to the Drawer Reconciliation and Employee Reconciliation Feature Focus Guides for more information on using the ‘Reconcile All Tenders’ and ‘# of Attempts’ check boxes.

**# of Attempts** — Sets the number of times all employees clocked in with this job code can attempt to reconcile tenders before a manager must approve the reconciliation. **Related Option:** To enable an employee to override a reconciliation when the number of attempts lapses, select ‘Force Reconciliation’ in Maintenance > Labor > Access Levels > Employees tab.

### Audit Group Box

Use the Audit group box to force all employees clocked in with this job code to reconcile the number of coupons they receive upon their checkout.
Audit selected coupon — Requires the job code to perform a coupon audit count at checkout for all qualifying coupons. Related Option: You must select ‘Audit Count at Checkout’ for each coupon in Maintenance > Payments > Promotions > Coupon to qualify a coupon for audit count.

# of Attempts — Sets the number of attempts at reconciliation all employees clocked in with this job code, can declare coupons, before a manager must approve the reconciliation. Related Option: To enable an employee to override a reconciliation when the number of attempts lapses, select ‘Force Reconciliation’ in Maintenance > Labor > Access Levels > Employees tab.

Tip Declaration Group Box

Use the Tip Declaration group box to define requirements for job codes that require employees to declare their tips. Related Option: The ‘Clock In/Clock Out not Required’ option in Maintenance > Labor > Job Codes > Job Code tab enables, then disables this option.

Threshold Type — Specifies the threshold to use when employees declare their tips.

- **Amount** specifies the tip threshold, by job code, based on the fixed amount entered in the ‘Tip Threshold’ text box, per job code. Use this method for non-order entry employees who receive and must declare tips, such as bussers and dishwashers. For example, if the fixed tip threshold is $2.00, then the employee must declare at least $2.00. Required Option: To define the tip threshold for this declaration method, type an amount in the ‘Tip Threshold’ text box, located on this tab.

- **Charged Tips minus Percentage** specifies the tip threshold, by job code, based on the following calculation: (employee’s charged tips - tipshare distribution) - (job code tip threshold x employee’s tippable sales). If the calculated tip threshold amount is less than zero, the system rounds up and uses the value of zero. For example, if the employee enters $215.00 in tippable sales, receives $13.00 in charged tips, has a tip % threshold value of 1, and pays $3.00 in tipshare, then the employee must declare at least $7.85. Required Options: 1) To define the tip threshold for this declaration method, type a percentage in the ‘Tip Threshold’ text box, located on this tab. 2) If you clear ‘No Minimum Declared Tips’ in Maintenance > Store Settings > Labor group > Employee Settings tab and the employee’s calculated tip declaration is less than the employee’s charged tips, then the employee must declare at least the amount of their charged tips.

- **Global Percentage** specifies the tip threshold, by store, based on the following calculation: store’s tip % threshold x employee’s tippable sales. For example, if the employee’s tippable sales is $100.00 and the store’s tip % threshold is 10%, the employee must declare at least $10.00. Required Option: To define the tip threshold for this declaration method, type an amount in the ‘Tip % Threshold’ text box in Maintenance > Store Settings > Financials group > Reports tab.
**Hourly Amount** specifies the tip threshold, by job code, based on the greater of the following calculations: employee’s charged tips OR job code tip threshold x employee’s work time. For example: The employee works three hours, receives $10.00 in charged tips, and has a tip threshold value of 5. The employee must declare at least $15.00 because the job code tip threshold x employee’s work time equals $15.00, which is greater than the employee’s charged tips of $10.00. **Required Option:** To define the tip threshold for this declaration method, type a value in the ‘Tip Threshold’ text box, located on this tab.

**Hourly Amount plus Charged Tips** specifies the tip threshold, by job code, based on the following calculation: (job code tip threshold value x employee’s work time) + (employee’s charged tips - employee’s tip distribution). For example, if the employee works 3.45 hours, receives $13.00 in charged tips, has a tip % threshold value of 5, and pays $3.00 in tipshare, then the employee must declare at least $27.25. **Required Options:** 1) To define the tip threshold for this declaration method, type a value in the ‘Tip Threshold’ text box, located on this tab. 2) If you clear ‘No Minimum Declared Tips’ in Maintenance > Store Settings > Labor group > Employee Settings tab and the employee’s calculated tip declaration is less than the employee’s charged tips, the employee must declare at least the amount of their charged tips.

**Percentage** specifies the tip threshold, by job code, based on the following calculation: job code tip % threshold x employee’s tippable sales. For example, if the employee’s tippable sales is $100.00 and the tip % threshold is 10%, then the employee must declare at least $10.00. **Required Option:** To define the tip threshold for this declaration method, type a percentage in the ‘Tip Threshold’ text box, located on this tab.

**Tip Threshold** — Specifies the tip threshold value, between 0.00 to 9999.99, based on the tip declaration you select from the ‘Threshold Type’ drop-down list. **Related Options:** 1) If you select ‘Global Percentage,’ the system disables this option and uses the ‘Tip % Threshold’ option in Maintenance > Store Settings > Financials group > Report tab. 2) If you select ‘Amount,’ ‘Hourly Amount,’ or ‘Hourly Amount minus Percentage, the system treats the value as an amount. 3) If you select ‘Percentage,’ or ‘Charged Tips minus Percentage,’ the system treats the value as a percentage.

**Display Threshold Message** — Displays a warning message when employees clocked in with this job code declare tips less than the defined threshold, or minimum, amount.

**Message** — Designates the pre-defined custom message to appear when employees declare tips less than the threshold amount. If you need to add or modify a message, click Message to access the Guest Check Messages function. When you modify a message, the change applies to all areas assigned to that message.
Override Function — Specifies the action for the system to take when the employee declares less than the tip threshold. The override options are as follows:

- **Complete Clock Out** proceeds to clock the employee out even though the employee declared less than the calculated tip threshold amount.
- **Re-prompt for Declared Tips** displays the FOH Enter Declared Tips screen again until the employee declares an amount equal to or greater than the calculated tip threshold.
- **Require Manager Approval** rather than clock the employee out or allow the employee to enter their tips again, a manager must approve the clockout of the employee. **Related Option:** To allow an employee, typically a manager, to approve a clockout, select ‘Allow Clockout’ in Maintenance > Labor > Access Levels > Employee tab for the access level to which the employee is assigned.

**Delivery Tab**

Employees who work with delivery orders must be assigned to job codes with specific delivery-related settings enabled. Select the Delivery tab from the Job Codes function.

![Figure 3-16 Job Codes - Delivery Tab](image-url)
**Delivery Driver** — Defines the employee as a driver, capable of receiving order assignments from the restaurant and delivering them to customer locations.

**Self Assign Delivery Orders** — Enables delivery drivers to view orders ready for delivery in the system, and to assign the orders to themselves without the need for authorization from a manager or another employee. **Required Option:** You must select ‘Delivery Driver’ to enable this option.

**Track Mileage** — Enables mileage tracking and reimbursement for drivers. **Required Options:** 1) You must select ‘Delivery Driver’ to enable this option. 2) This feature works in conjunction with the options in Maintenance > Labor > Employees > Delivery tab.

**Delivery Dispatcher** — Enables the employee to assign completed orders to drivers and to sign the drivers out and back in as they leave and return.

**Delivery Order Taker** — Enables the employee to receive delivery orders into the system and to authorize the orders for preparation.

### Breaks Tab

Use the Breaks tab to allow employees to take breaks and define the break requirements. Some options are in relation with the break and shift rules defined in Maintenance > Store Settings > Labor group > Breaks tab. Select the Breaks tab from the Job Codes function. **Related Option:**
The ‘Clock In/Clock Out not Required’ option in Maintenance > Labor > Job Codes > Job Code tab enables, then disables this option.

![Figure 3-17 Job Codes - Breaks Tab](image)

**Allow Paid Breaks** — Allows all employees clocked in with this job code to have the ability to take paid breaks. **Related Requirements:** You must access Maintenance > Menu > Panel Editor and add the Break button function to a panel to display on the FOH.

**Allow Unpaid Breaks** — Allows all employees clocked in with this job code to have the ability to take unpaid breaks. **Related Requirements:** You must access Maintenance > Menu > Panel Editor and add the Break button function to a panel to display on the FOH.

**Allow Rest Period Breaks** — Requires all employees clocked in with this job code to receive rest period breaks based on break and shift rules. **Required Option:** You must access Maintenance > Store Settings > Labor group > Breaks tab and Maintenance > Store Settings > Labor group > Shifts tab, to define break and shift rules and enable this option. **Related Requirement:** You must access Maintenance > Menu > Panel Editor and add the Break button function to a panel to display on the FOH.
**Allow Meal Period Breaks** — Requires all employees clocked in with this job code to receive meal period breaks based on break and shift rules. **Required Option:** You must access Maintenance > Store Settings > Labor group > Breaks tab and Maintenance > Store Settings group > Labor > Shifts tab, to define break and shift rules and enable this option. **Related Requirement:** You must access Maintenance > Menu > Panel Editor and add the Break button function to a panel to display on the FOH.

**Enforce ___ Minutes Paid Break** — Defines a specified number of minutes, between 1 and 999, of paid break time the system requires the employee to take. For example, if company policy requires all employees take a 20 minute break, type 20 minutes. The employee can not return from the paid break until the 20 minute time frame elapses, unless the manager has the ability to approve the early break return. **Required Options:** You must select either ‘Allow Paid Break’ or ‘Allow Rest Period Break’ to enable this option.

**Enforce ___ Minutes Unpaid Break** — Defines a specified number of minutes, between 1 and 999, of unpaid break time the employee must take. For example, if company policy requires all employees take a 20 minute break, type 20 minutes. The employee can not return from the unpaid break until the 20 minute time frame elapses unless the manager has the ability to override the early break return. **Required Options:** You must select ‘Allow Unpaid Break’ or ‘Allow Meal Period Break’ to enable this option.

**Limit Paid Meal Break** — Enforces a limit on the number of minutes for which an employee receives wages when on a meal period break. **Required Options:** 1) You must access Maintenance > Store Settings > Labor group and select ‘Use Break Rules’ to enable this option. 2) You must access select Maintenance > Store Settings > Labor group > Employee Settings tab and select ‘Paid and Does Count Toward Overtime’ or ‘Paid and Does Not Count Toward Overtime’ to limit paid meal breaks.

**Max of ___ Minutes** — Specifies the maximum number of minutes, from 1-999, to pay toward a paid meal period break. The system stops calculating labor minutes when the meal period break reaches the maximum number of minutes. **Related Option:** You must select ‘Limit Paid Meal Break’ to enable this option.

**Waive Break Group Box**

Use the Waive Break group box to allow employees the option to waive their paid meal break when using the break and shift rules.
**Display Meal Waive at** — Specifies when to prompt an employee clocked in under this job code to receive the waive break message. Select from Clock In, Clock Out, or None. If you select ‘None,’ this negates the feature and the employee never receives the message to waive their meal period break.

**Message** — Displays the message to use as a prompt to remind an employee to coordinate their meal period break with their manager. **Required Requirement:** To define a message, click Message to access the Clock In Information function and define a new message.
Access Levels

Use access levels to control security settings and the corresponding rights and privileges assigned to each security access code. Using this function, you determine if the employee can perform a certain function without manager approval. In addition to the check boxes in Job Codes, these options further define job functions, but more importantly, they control who can perform certain functions.

Select Maintenance > Labor > Access Levels to display the Access Levels function. The Access Levels function provides the following tabs: Reports, Financial, Employee, and System.

**Level** — Holds the description and a unique two-digit number that identifies each access level. To create a new access level, enter an unused number, and press Enter. To edit an existing access level, scroll through the Level drop-down list, select the level to edit and press Enter.

**Description** — Holds the full name, up to ten characters, for the access level.

**Reports Tab**

Use the Reports tab to allow employees to view certain FOH reports.

![Access Levels - Reports Tab](image)

*Figure 3-18 Access Levels - Reports Tab*
**Restaurant Sales** — Enables all employees using this access level to run the FOH Restaurant Sales Report from the FOH.

**Server Sales** — Enables all employees using this access level to run the FOH Server Sales report from the FOH.

**Labor and Clock Reports** — Enables all employees using this access level to run the FOH Labor report and clock in and clock out reports from the FOH terminal.

**Mgr Flash Rpt** — Enables all employees using this access level to view FOH configured sale reports.

**Payment Report** — Enables all employees using this access level to run the FOH Payment report from the FOH. This report prints only credit card payments.

**Employee Breaks** — Enables all employees using this access level to run the FOH Employee Breaks report. **Related Requirement:** Access Maintenance > Menu > Panel Editor to add the Employee Breaks report button to display on the FOH.
Financial Tab

Use the Financial tab to allow access to functions related to financials. Select the Financial tab from the Access Levels function.

Assign Promo — Allows all employees using this access level the ability to apply a promotion to guest checks. This is generally reserved for managers.

Delete Promo — Allows all employees using this access level the ability to delete a promotion from the check.

Assign Comp — Allows all employees using this access level the ability to apply a comp to guest checks. This is generally reserved for managers.

Delete Comp — Allows all employees using this access level, the ability to delete a comp from the check.
**Assign Day Part** — Allows all employees using this access level the ability to manually set the current meal period. **Required Option:** You must select this option with ‘Manual Day Parts’ in Maintenance > Store Settings > Security group > POS Security tab. **Related Requirement:** Access Maintenance > Menu > Panel Editor to add the Assign Day Part button to display on the FOH.

**eFrequency Max Visits** — Enables all employees using this access level to allow the check to count toward eFrequency rewards, as configured in the eFrequency program, after the member has reached the maximum number of visits per day. **Related Option:** This option overrides the ‘Max Visits’ option in the eFrequency Configuration wizard.

Refer to the eFrequency User Guide for more information on establishing maximum visits for eFrequency.

**Split Checks** — Allows all employees using this access level to split a guest check into separate checks. If cleared, manager approval is required to split a check. **Related Options:**
1) To print the number of split checks on the employee checkout report, select ‘Print # of Check Splits’ in Maintenance > Store Settings > Printing group > Employee Checkout Cfg tab.
2) To allow employees to split checks with applied promotions, comps, or tax exemptions, select ‘Allow Split Promos, Comps, TaxExempt’ in Maintenance > Store Settings > Security group > Restrictions tab.
3) To restrict employees from moving applied payments from one split check to another, select ‘Cannot Move Payment Types’ in Maintenance > Store Settings > Security group > Restrictions tab.

**Reopen Check** — Allows all employees using this access level the ability to reopen a check that has been closed by any employee. **Related Requirement:** Access Maintenance > Menu > Panel Editor to add the Reopen Check button to display on the FOH.

**Reprint Check** — Allows all employees using this access level the ability to reprint clockouts, checkout reports, and guest checks.

**Void Items** — Allows all employees using this access level the ability to void ordered items from a check, for any employee. The manager password prompt appears. If selected, the employee enters their own password, and then enters the void reason to complete the void. If cleared, a manager enters their password, and then enters the void reason. The void reason displays on the Void Report.

**Cash Drawers** — Allows employees assigned to this access level to perform cash drawer management and petty cash functions.
Cash Drawer Checkout — Allows employees assigned to this access level to perform a drawer checkout. If cleared in QuickService, a screen requiring manager approval appears when you perform a drawer checkout.

Override Category Limits — Allows all employees using this access level the ability to override any item limit defined for a category. Related Option: 1) To define an item limit for a category, enter the maximum number of items allowed in ‘Max per Check’ in Maintenance > Menu > Categories. 2) The ‘Override Category Limits’ option also allows you to enter your employee number in the FOH Manager Approval screen to approve the entry when you enter more items than defined in ‘Max Per Check.’

eFrequency Manual Card # — Enables an employee to manually enter an eFrequency card number, without encountering the Manager Approval screen. It also allows this same employee to enter a password to continue, when an employee without sufficient access attempts to manually enter the eFrequency card number. Related Option: This setting overrides the ‘Must Use Mag Card’ option in the eFrequency Configuration wizard.

Adjust Payments — Allows all employees using this access level the ability to make adjustments to payments, comps, or promos for any employee. This is generally reserved for a manager. Related Requirement: You must access Maintenance > Menu > Panel Editor to add the Adjust Payments button to display on the FOH.

No Sale — Allows all employees using this access level with the ability to access the ‘No Sale’ function in the FOH. Related Requirement: You must access Maintenance > Menu > Panel Editor to add the Open Drawer button to display on the FOH.

Cash Refunds — Allows all employees using this access level with the ability to issue cash refunds.

Non-Cash Refunds — Allows all employees using this access level with the ability to issue refunds for non-cash tenders other than credit cards, such as room charges, accounts receivable charges, and gift certificates.

C.C. Refunds — Allows all employees using this access level with the ability to issue credit card refunds.

Refer to the eFrequency User Guide for more information regarding the use of Mag Cards with eFrequency.
**Manual Card #** — Allows all employees using this access level to bypass the Manager Approval screen that normally appears when they attempt to manually enter a credit card or gift card number. *Related Options:* The Manager Approval screen appears if you select ‘Use Magnetic Card Only’ in Maintenance > Payments > Tenders > Type tab, or ‘Use Mag Card Only’ in Maintenance > Store Settings > Gift Card/Certificates Sales group > Gift Card Sales tab.

**Force Auth** — Allows all employees using this access level to force authorization on credit card and gift card payments.

**Override Security Verification** — Allows all employees using this access level to bypass the security verification options for tenders. *Related Options:* To define security verification options, access Maintenance > Payments > Tenders > Security Verification tab.

**eFrequency Card Use** — Enables all employees using this access level to approve the assignment of a member to a check for cards with ‘Require Manager Approval’ selected in the Card Setup wizard.

Refer to the eFrequency User Guide for more information regarding manager approval for specific cards.

**PMS Auth Offline Posting** — Enables all employees using this access level to allow posting of PMS charges when the POS system cannot connect to the PMS.

Refer to the Interfacing PMS with Aloha User Guide for more information regarding interfacing with a property management system.

**Tender Group** — Restricts the employee using this access level from applying payments using only the tenders defined in the specified tender group. An employee with sufficient access must approve any tender not available within the assigned tender group. Select ‘All (0)’ to allow the use of all tenders. If the tender group is not available from the drop-down list, click the Tender Group button to create a new tender group.
Employee Tab

Use the Employee tab to allow access to functions related to employee functions. Select the Employee tab from the Access Levels function.

![Access Levels Maintenance](image)

**Figure 3-20  Access Levels - Employee Tab**

**Approve Clock in** — Allows all employees using this access level the ability to approve clock-in transactions.

**Approve Checkout** — Allows all employees using this access level the ability to approve check-out transactions.

**Approve Clockout** — Allows all employees using this access level the ability to approve clock-out transactions.

**Approve Break Returns** — Allows all employees using this access level the ability to approve an early break return. **Related Option:** To define the number of minutes to enforce a break, type a number in ‘Enforce ___ Minute Breaks’ in Maintenance > Labor > Job Codes > Job Code tab.

**Delete Checkout** — Allows all employees using this access level the ability to delete checkout transactions. **Related Requirement:** You must access Maintenance > Menu > Panel Editor to add the Delete Checkout button to display on the FOH.
Delete Clockout — Allows all employees using this access level the ability to delete clockout transactions. Related Requirement: You must access Maintenance > Menu > Panel Editor to add the Delete Clockout button to display on the FOH.

Clear Password — Allows all employees using this access level the ability to clear passwords for other employees. This setting is generally selected for managers. Related Requirement: You must access Maintenance > Menu > Panel Editor to add the Clear Password button to display on the FOH.

Assign Pen ID’s — Allows all employees using this access level the ability to assign Pen IDs to other employees for system access. Related Requirement: You must access Maintenance > Menu > Panel Editor to add the Assign Pen ID button to display on the FOH.

Enroll Fingerprint — Allows all employees using this access level the ability to assign login access to employees, via the fingerprint scanner system.

Force Reconciliation — Allows all employees using this access level the ability to force reconciliation, even if the number of attempts at reconciliation exceeds the number specified in that employee’s job code. This is generally reserved for managers. Related Option: To define the number of reconciliation attempts allowed per job code, type a number in ‘# of Attempts’ in Maintenance > Labor > Job Codes > Functions tab.

Refer to the Drawer Reconciliation or Employee Reconciliation Feature Focus Guides for more information on reconciliation.

Force Coupon Audit — Enables all employees to override the error message that displays and force a reconciliation of a coupon audit, after exceeding the defined number of attempts.

Open Any Drawer — Allows all employees using this access level the ability to open cash drawers associated with a specific terminal. A reason for opening the drawer is required. The event is recorded like the No Sale event, and displays in the audit log.

Deassign Drawers — Allows all employees using this access level the ability to deassign employees from their assigned cash drawers. This is typically a manager function.

Open Items — Allows all employees using this access level the ability to ring up open items on the FOH. Related Requirement: You must access Maintenance > Menu > Panel Editor to add the PLU List button to display on the FOH.
**Quick Count** — Allows all employees using this access level the ability to access Quick Count screens and reports on the FOH and BOH. **Related Requirement:** You must access Maintenance > Menu > Panel Editor to add a Quick Count button for each count type to display the buttons on the FOH.

Refer to the Quick Count Feature Focus Guide for more information on implementing and using Quick Count.

**Enter Other Wages** — Allows all employees using this access level the ability to enter other wages from the FOH manager screen. **Related Requirement:** You must access Maintenance > Menu > Panel Editor to add the Other Wages button to display on the FOH.

**Downtime** — Allows all employees using this access level the ability to transfer the BOH system to another computer.

**Release Locked Employee** — Enables all employees using this access level with the ability to allow an employee to log back into the system in the event that when the employee was currently logged in at the time the system lost connectivity or froze. This issue only occurs with hand helds and devices running through COM. **Related Requirement:** You must access Maintenance > Menu > Panel Editor and add the ‘Release Locked Employee’ button to a panel to display on the FOH.
System Tab

Use the System tab to allow access to functions related to the system. Select the System tab from the Access Levels function.

![Figure 3-21 Access Levels - System Tab](image)

Reroute — Allows all employees using this job code the ability to reroute printers, printer groups, or remote display systems.

End of Day — Allows all employees using this job code the ability to manually run EOD functions from FOH. **Related Requirements:** 1) The End of Day function is typically scheduled as an event. Access Maintenance > System > Events to schedule an End of Day event. 2) Access Maintenance > Menu > Panel Editor to add the End of Day button function to a panel to display on the FOH.

Shutdown Terminal — Allows all employees using this job code with the ability to close the FOH. The system proceeds directly to the Windows shutdown screen. This applies only to terminals running Microsoft Windows® 98, XP and embedded XP, and prevents employees from simply turning off the machine, which could cause data corruption. **Related Requirements:** You must access Maintenance > Menu > Panel Editor to add the Shutdown Term button function to a panel to display on the FOH.
Calibration — Allows all employees using this job code with the ability to calibrate the touch-screen server terminals. Related Requirement: You must access Maintenance > Menu > Panel Editor to add the Calibrate button function to a panel to display on the FOH.

Query Cash Card — Allows all employees using this job code with the ability to query the balances of cash cards. Related Requirement: You must access Maintenance > Menu > Panel Editor to add the Query Cash Card Balance button function to a panel to display on the FOH.
Labor Groups

Labor Groups are sales categories and job codes combined for reporting purposes. These are used by management as a tracking and analysis tool. Only the existing sales categories and job codes are available for selection.

Select Maintenance > Labor > Labor Groups to display the Labor Groups function.

**Figure 3-22 Labor Groups Function**

**Group ID** — Holds the name and a unique two-digit number that identifies each labor group. To create a new labor group, enter an unused number and press Enter. To edit an existing labor group, scroll through the Group ID drop-down list, select one to edit and press Enter.

**Name** — Represents the description assigned to a labor group.

**Sales Categories** — Lists the sales categories available to place in the selected labor group. To remove a category from the selected labor group, click it again. Select up to 20 sales categories per labor group. **Related Requirement:** To define categories, select Maintenance > Menu > Categories.
**Job Codes** — Lists the job codes available to place in the selected labor group. To remove a category from the selected labor group, click it again. Select up to 99 job codes per labor group. **Related Requirement:** To define job codes, select Maintenance > Labor > Job Codes.
Performance Measures

Use the Performance Measures function tab to set profiles for sales targets and comparisons to track employee performances against the objectives of each performance measure. Define up to 99 performance measures. These measures display for the current day in the FOH Server Sales report and checkout report. Each profile can have one check box selected to govern how the measurements are calculated.

You can configure a performance measure to be active at all times in the Performance Measures function or activate a performance measure independently, as needed, using the Activate Performance Measure event. This allows you to centrally manage performance measures and reduce the number of measures that appear on the FOH screens, checkouts, and the BOH Performance Measures report. This feature is beneficial in a CDM environment where the corporate store can send an event to activate or turn off a measure at the store level.

Select Maintenance > Labor > Performance Measures to display the Performance Measures function.

![Figure 3-23 Performance Measures Function]
**Performance Measure** — Holds the description and a unique five-digit number that identifies each performance measure. To create a new performance measure, enter an unused number and press Enter. To edit an existing performance measure, scroll through the Performance Measure drop-down list, select one to edit and press Enter.

**Description** — Holds a description, up to 15 characters, that identifies the performance measure.

**Target Category** — Represents the item category to use in performance calculations.

**Base Category** — Compares against the target category when ‘Count To Count’ or ‘Sales To Sales’ is selected.

**Active** — Specifies the performance measure is active at all times. **Related Requirement:** To activate a performance measure independently, as needed, select the Activate Performance Measure event in Maintenance > System > Events.

**Straight Sales** — Provides a sales count and total in dollars of the target category.

**Sales Per Hour** — Provides a sales per hour figure (in dollars) of the target category.

**Count To Guests** — Provides a total count of the target category divided by the number of guests served.

**Sales To Guests** — Provides total sales of the target category divided by the number of guests served.

**Count To Count** — Compares target category count to base category count.

**Sales To Sales** — Compares target category sales to base category sales.

**Sales Per Check** — Calculates sales per check of items in the target category.
Termination Reasons

Use the Termination Reasons function tab to establish up to 50 termination reasons, which are used in the Employee function tab to document why an employee left the company.

Select Maintenance > Labor > Termination Reasons to display the Termination Reasons function.

**Figure 3-24** Termination Reasons Function

**Reason #** — Holds the reason and a unique three-digit number that identifies each termination reason. To create a new termination reason, enter an unused number and press Enter. To edit an existing termination reason, scroll through the Reason # drop-down list, select the reason to edit and press Enter.

**Type** — Contains a selection list of reason types, such as Termination, Leave of Absence, and Transfer.

**Voluntary** — Indicates the listed reason is a voluntary termination.

**Reason** — Represents the long description of the termination number.
Back Office Security Levels

Use the Back Office Security Levels function tab to create security levels to provide employees access to functions located in the back-of-house. Select various functions in which to give run, add, edit, and delete permissions.

Select Maintenance > Labor > Back Office Security Levels to display the Back Office Security Levels function.

**Figure 3-25 Back Office Security Levels Function**

**ID** — Holds the name and a unique four-digit number that identifies each back office security level. To create a new level, enter an unused number and press Enter. To edit an existing level, scroll through the ID drop-down list, select the level to edit, and press Enter.

**Name** — Specifies a unique name and should be descriptive of the type of level.

**Screen Timeout** — Denotes the number of seconds before access to the BOH times out from inactivity. Once the screen times out, employees must log in again to re-gain access. Enter 1 if you do not want the BOH to time out.
**HTML Page** — Holds the path to the HTML page, if the selected security level is associated with an HTML page.

**Start Level Group Box**

**Start Level** — Displays existing security levels to use with the copy function to change the access of existing levels or create new levels. To create a new security level, choose an existing security level from the drop-down list that contains most or all the security access functions the new level should contain. Click Copy. The confirmation displays.

![Back Office Security Levels Maintenance](image)

*Figure 3-26 Back Office Security Attributes Copy Confirmation*

Click OK to copy the security level access settings from the existing security level to the new security level. The new security level contains all functions from the copied security level. Enter a new security level ID and name to identify the new level. Complete any additions or deletions of security functions to the new level by selecting the function from the Functions list and selecting the appropriate options from the Security Level group box.

**Function** — Contains all BOH security functions.

**Security Levels (located at bottom of screen)**

**Run** — Enables the employee to access and view the selected function.

**Add** — Enables the employee to add records to the selected function.

**Edit** — Enable the employee to edit records in the selected function.

**Delete** — Enables the employee to delete records from the selected function.
Other Wages

Use the Other Wages function to manually enter and edit PTO in the form of sick, holiday, or vacation time for your employees. Calculate the PTO pay in hours, dollar amounts, or both. In addition, you set parameters for system generated adjustments relating to meal and rest period breaks, split shift premiums, and others. Enter other wages from either the FOH or the BOH, with appropriate access.

The Other Wages function uses wage types you define. In addition to sick pay, holiday, and vacation pay, here are some examples of PTO wage types:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bonus</td>
<td>Pay for bonus hours or dollar amount.</td>
</tr>
<tr>
<td>Bereavement</td>
<td>Pay for funeral leave.</td>
</tr>
<tr>
<td>Jury Duty</td>
<td>Pay for jury service.</td>
</tr>
<tr>
<td>Training</td>
<td>Pay for time spent while employee is in training.</td>
</tr>
<tr>
<td>Cash Tips</td>
<td>Dollar amount or hours employee is given for tips.</td>
</tr>
<tr>
<td>Adjustments</td>
<td>Pay adjustment to correct a previous error, deduct an authorized deduction, or any other adjustment needed.</td>
</tr>
</tbody>
</table>

*Check the wage and payday laws for your state to ensure your policies and procedures are in compliance. We recommend you authorize any wage adjustments in writing and have the form signed by the consenting employee and supervisor.*
Select Maintenance > Labor > Other Wages to display the Other Wages function.

![Figure 3-27 Other Wages Function](image)

**Wage Type#** — Holds the description and a unique four-digit number that identifies each wage type. To create a new type, enter an unused number and press Enter. To edit an existing type, scroll through the ID drop-down list, select one to edit, and press Enter.

**Description** — Designates a descriptive name to be used on screens.

**Short Name** — Denotes a descriptive name to be used on reports.

**Export ID** — Designates a unique code for each wage type to enable exporting in third party software application interfaces.

---

*Your wage type parameters and pay procedures should reflect the company policies defined and supported by your establishment.*
Type Group Box

Use the Type group box to configure the different wage types you need in your system.

---

If you identify a wage type as one that calculates by hours, the ‘Amount’ text box is disabled when PTO records are added. Likewise, if you identify a wage type as one that calculates by a set dollar amount, the ‘Hours’ text box is disabled when PTO records are added. If you identify a wage type as one that calculates by both hours and amount, both text boxes are enabled when a PTO record for that wage type is added.

---

**Hours** — Enables you to configure a wage type that calculates by number of hours.

**Amount** — Enables you to configure a wage type that calculates by dollar amount.

**Both** — Enables you to configure a wage type that calculates by both hours and dollar amount.
Edit Punch Reasons

Use the Edit Punch Reasons function to define specific reasons to use when editing a punch on the BOH and FOH. For example, if you commonly edit a punch for employees who forget to clock in, you can define an edit punch reason stating ‘Employee forgot to clock in.’ The reason appears with the corresponding punch on the Edited Punches report. Related Option: You must select ‘Use Edit Punch Reasons’ in Maintenance > Store Settings > Labor Group > Employee Settings tab to activate this function.

Select Maintenance > Labor > Edit Punch Reasons to display the Edit Punch Reasons function.

![Edit Punch Reasons Function](image)

**ID** — Holds the name and unique number that identifies each edit punch reason. Enter a number up to 99.

**Description** — Describes the reason for the punch up to 40 characters of text, such as ‘Forgot to clock in’ or ‘Returned early.’
Menu Maintenance Functions

This chapter outlines setting up menus and taxes. Topics include modifiers and categories and how they interact with the menu.

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The Aloha Menu system offers nearly unlimited options to construct computer-based menus that are comprehensive, flexible, and modifiable. You can define as many different menus as necessary for different sections of the establishment, different times of the day, different days of the week, or for special events. You can also assign a different screen to each job code, and have them active at the same time. The Aloha POS system supports up to 999 different menus; a number well beyond what most restaurants find necessary.

This section discusses the menu building process, in detail, and establishes such things as the components of the menu system, the interdependencies between the components, and the recommended method for building a menu system. Before building the menus, you must first understand the available pricing methods and the hierarchy used to determine the price in effect for the item when it is ordered.

Select Maintenance > Menu to access the menu setup, taxing, and pricing options. The Maintenance Menu submenu appears.

![Figure 4-1 Menu Maintenance](image-url)
Use the options on this menu to:

- Determine the price of an item using the available pricing methods and their hierarchy.
- Create required items, including menu items, and modifiers.
- Create categories and add items to them.
- Create modifier groups and attach them to items.
- Create taxes and attach them to items.
- Create size groups.
- Create the FOH user interface using Panel Editor and Screen Editor. This includes creating panels for use with menus, order modes, tenders, and other button functions.
- Create modifier codes.
Menu Building Methods

There are several methods you can use to build the menu system. The recommended method is to build menus from the bottom up, beginning with tax methods, then building the menu items and modifiers. Attach the items to buttons on a panel, and then assign the panels to screen(s) using Screen Editor. Or you can reverse the process and build the menus from the top down.

Regardless of the method you choose to build the menus, the interdependencies of database files must be remembered. Some files must be revisited in order to complete the records, such as to add a modifier group to an item. However, building menus from the bottom up reduces the amount of revisiting required.

The diagram shown in Figure 4-2 represents building a menu system from the bottom up and reflects the interdependencies between the database files:

![Figure 4-2 Bottom to Top Menu Building Method](image)
To build a menu from the bottom up:

1. Select Maintenance > Menu > Taxes and define all required tax methods. Tax records are complete, and are not interdependent on other database files. Every item must be assigned a tax method. For items that are not taxed, create a ‘No Tax’ tax record and assign this tax to the item. (Refer to Taxes in this chapter for details on creating taxes.)

2. Select Maintenance > Menu > Flex Taxes and define all flex taxes, if applicable. Flex Tax records are complete, and are not interdependent on other database files.

3. Select Maintenance > Menu > Surcharges and define all surcharges, if applicable. The Surcharge records are complete, and are not interdependent on other database files.

4. Select Maintenance > Menu > Items and enter all menu items, as well as items that are used to modify the newly entered items. Assign the correct tax method when entering each menu item.

5. Select Maintenance > Menu > Categories and define all categories. Place the appropriate items in them. Each item must be in either a sales or retail category. Items can be placed in an unlimited number of non-sales categories.

6. Select Maintenance > Menu > Modifiers and create the required modifier groups.

7. Select Maintenance > Menu > Items again, and attach the appropriate modifier groups to the corresponding items.

8. Select Maintenance > Menu > Panel Editor and define all necessary panels. Place the required buttons on them.

9. Select Maintenance > Menu > Screen Editor and define all necessary home screens. Place the desired panels on them.

10. Select Maintenance > Labor > Job Codes and attach the necessary home screen to the corresponding job code.
Items

The Items function enables you to store all items you plan to sell at your establishment in a central, robust, database. Menu items are the building blocks that form the base of the QuickService system. You should add every item available to sell or consume at a restaurant to the QuickService item database. This means not only do you add ‘Double Cheeseburger’ to the database; but, also the items used to make the ‘Double Cheeseburger,’ such as cheese, lettuce, tomatoes, pickles, onions, and hamburger buns.

You also add modification items to the database. You might ask, “What in the world are modification items?” To answer your question, modification items are the items or elements that help you customize your menu items, as well as customize the preparation of your menu items. For example, if you add an ‘8oz Steak’ to your item database, this typically means that you plan to offer steak as an entree item for your restaurant. But when a customer orders a steak at a restaurant, they do not simply tell the server “I’d like to order the steak.” Instead, they often say, “I’d like to order the steak, prepared medium rare” or “I’d like to order the steak, and make sure it’s prepared well done.” In these examples, the customer is attempting to customize their order, and the server must have a way to enter the customer’s order, with the customizations included. To do this, you add modification items to the database, such as meat temperatures, toppings, quantities and sizes, and anything else that is normally written on a guest check or kitchen chit to modify a menu item.

Additionally, you can add any retail items you plan to sell to the QuickService item database, such as shirts, mugs, hats, gift cards, and other sales items your establishment offers.

You can add up to 999,999 items; however, a limit is enforced in the Systems options, located under Maintenance > Store Settings. Increasing the number of menu items to 30,000 uses more memory and should be used only when necessary.

Each item you add to the database is called an ‘item record.’ And each item record requires data from other components of the Maintenance function, including Taxes, Surcharges, Modifiers, and Categories, in order for the item record to be complete.

Once you add your items to the database, you use these items to form the submenus, modifier groups, and exception modifier groups you need for the Aloha Front-of-House POS system.

As you add new items to your menu, do not forget to add them to your QuickService item database also. Include not only your menu items, but the ingredients for these items, as well as any new modifiers for the items.
Items Quick Tips

An items database can be as simple or as complex as required; but, there are several rules or tips to follow when you add a new item to the database:

- Assign numbers to your items in groups, using a uniform method. For example, create appetizers using a number between 3000-3999, and create entrees using a number between 4000-4999.
- The short name for an item appears on the order button and can be up to 15 characters; however, if you type over 11 characters, the short name might appear cropped on a button. As a solution, type ‘\n’ at the desired line break in the ‘Short Name’ text box to configure the short name to appear as two lines on a button.
- The chit name for an item can be up to 15 characters and is typically in ALL CAPS. Consult with the chef for preferences and names.
- The long name for an item can be up to 25 characters and appears on the guest check; therefore, be sure to double-check the spelling.
- It is mandatory to apply a tax, category, and printer group, to an item record.
- If applicable, remember to assign a modifier group to an item. You can assign more than one modifier group, if necessary.
- You can price an item at the ‘item’ level; however, there are alternative pricing methods available to price items, and which one you use depends on your business needs.

Select Maintenance > Menu > Items to display the Items function. The Items function provides the following tabs: Item, Modifiers, Price, Miscellaneous, Print, Token Distribution, and Display Options.

**Number** — Indicates the unique, six-digit number that identifies the item record. The item number is used in conjunction with the ‘Long Name’ to create a unique ID for each item record in the system. An item number can range from 1 to 999998; however, item numbers 30200 to 30299 are reserved for items with an item type of ‘Basic Gift Certificate.’ We recommend you group and assign numbers to your items, based on ‘item type.’
**Item Tab**

Use the Item tab to name items to use at your restaurant, define printing and video destinations, the theoretical food cost, and more.

![Image of Aloha Manager - QuickService](image)

*Figure 4-3 Items - Item Tab*

**Short Name** — Indicates the abbreviated name for the item record. The short name appears on item buttons in submenus, modifier groups, and exception modifier groups. The text is centered on the button; therefore, the length of the short name is a factor. The short name can be up to 15 characters; however, if you type over 11 characters, the short name might appear cropped on a button. As a solution, type ‘\n’ at the desired line break in the ‘Short Name’ text box to configure the short name to appear as two lines on a button. For example, type ‘Hot\nTamale’ to have ‘Hot’ appear on the top line and ‘Tamale’ appear on the bottom line of a button. Keep in mind, ‘\n’ takes up two of the allotted 15 characters.

*Capital letters used in the name text boxes take up more space than lowercase letters.*
**Chit Name** — Indicates the name of the item that appears on the kitchen chit. A chit is a printed order confirmation receipt the kitchen receives after you send an order to the kitchen. The chit can be up to 15 characters and contains menu items as well as modifiers, depending on how you enter the order in the system. You typically type the ‘Chit Name’ in ALL CAPs, to make the name easier to recognize. This option is useful if your restaurant uses nicknames for menu items. For example, if the kitchen staff of your restaurant refers to a lobster tail as ‘LOB,’ type LOB in the ‘Chit Name’ text box and ‘LOB’ appears on the kitchen chit each time a server enters an order for a lobster tail.

**Long Name** — Indicates the formal, more descriptive name of the item record. The ‘long name,’ which can be up to 25 characters, prints on the guest check and is used in conjunction with ‘Item Number’ to create a unique ID for each item record in the system.

**Control Name** — Indicates the global, corporate-level name for an item record, when a menu item name is different in certain regions or restaurant locations. Situations arise where geographical or language differences mandate that an item have a different ‘Short Name’ at different locations; although, the corporate office considers both items the same. For example, the corporate office of fast food chain XYZ might use ‘French Fries’ as their control name, but use the short name ‘Chips’ for their restaurants located in England, as the name ‘Chips’ is more common in that region.

**Priority** — Specifies the order in which the item appears on the kitchen chit. The priority level ranges from 01 to 255, with 01 as the highest level and 255 as the lowest level. A high priority item appears above a lower priority item. For example, an appetizer item might have a higher priority than an entree item, to ensure the kitchen knows to cook the appetizer before the entree.

**Cost** — Specifies the dollar amount required to produce the item. For example, this amount might be the standard cost of the menu item, based on the specific ingredient purchase costs. Do not confuse this option with the sell price (Default Price) of the item.

**Multiplier** — Specifies the quantity sold for the item, with 1 being the default. For example, specify a multiplier of 6 for the item Bud Lite 6 Pack because you are selling six bottles of Bud Lite in a pack. When you review the Product Mix report, the report shows that six bottles of Bud Lite were sold.

**Member of Category** — Indicates the name of the specific sales or retail category to assign to the item. A category is a grouping feature used for the purposes of reports, promotions, and comps, to name a few. For example, if you set up a sales category named ‘Appetizers,’ you can
assign each appetizer item to the ‘Appetizer’ sales category. Later, you can run various reports to track appetizer sales information. You must assign each item to one ‘sales’ or ‘retail’ type category. If you need to add or modify a category, click Category to access the Categories function.

**Primary Tax** — Specifies the main tax record to assign to the item. The primary tax is the basic, default tax rate the system applies to an item when sold. Each item must have a primary tax record assigned unless it uses a primary flex tax. If you need to add or modify a primary tax, click Primary Tax to access the Taxes function. When you modify a tax, the change applies to all items assigned to that tax.

**Prim Flex Tax** — Specifies the conditional tax record to apply to the item. For example, you can assign a flex tax based on the quantity of an item, the guest check subtotal, or the particular category of an item. If you need to add or modify a primary flex tax, click Prim Flex Tax to access the Flex Taxes function. When you modify a tax, the change applies to all items assigned to that tax.

**Secondary Tax** — Specifies the secondary tax to apply to the item, when used in conjunction with a primary tax, if applicable in certain tax jurisdictions. If you need to add or modify a secondary tax, click Secondary Tax to access the Taxes function. When you modify a tax, the change applies to all items assigned to that tax. **Required Option:** You must also select the ‘Use Secondary Taxes’ option in Maintenance > Store Settings > Financials group > Taxes & Surcharges tab.

**Sec Flex Tax** — Specifies the secondary flex tax to apply to the item, when used in conjunction with a primary flex tax, if applicable in certain tax jurisdictions. For example, you can assign a secondary flex tax based on the quantity of an item, the guest check subtotal, or the particular category of an item. If you need to add or modify a secondary flex tax, click Sec Flex Tax to access the Flex Taxes function. When you modify a tax, the change applies to all items assigned to that tax. **Required Option:** You must also select the ‘Use Secondary Taxes’ option located under Maintenance > Store Settings > Financials group > Taxes & Surcharges tab.

**Vendor Tax** — Specifies the tax record to apply to the item when passing on a vendor tax to customers, if applicable in certain tax jurisdictions. If you need to add or modify a vendor tax, click Vendor Tax to access the Taxes function. When you modify a tax, the change applies to all items assigned to that tax.

**Surcharge** — Specifies the tax record to apply to the item when passing on a surcharge tax to customers, if applicable in certain tax jurisdictions. If you need to add or modify a surcharge tax, click Surcharge to access the Surcharges function. When you modify a surcharge, the change applies to all items assigned to that surcharge.
Print — Indicates the specific group of printers to route the item to when you order it on the FOH system. A printer group can contain one or multiple printers. You first set up a printer group, and then assign a printer group to an item. Later, when you order the item on the FOH system, the item prints to one or more printers within the assigned printer group. If you assign a printer group to an item used as a modifier, but do not assign a printer group to an associated menu item, the menu item inherits the print destination of the modifier when you order the modifier. If you need to set up or modify a printer group, click Print to access the Printer Group function.

There are multiple, related options that also control how an item prints. Refer to the Printing-Chits group options in Maintenance > Store Settings for more information.

Video — Indicates the specific group of video screens to route the item to when you order it on the FOH system. A video group can contain one or multiple video displays. You first set up a video group, and then assign a video group to an item. Later, when you order the item on the FOH system, the item appears on one or more video displays within the assigned video group. If you need to add or modify a video group, click Video to access the Video Group function.

There are multiple, related options that also control how an item displays. Refer to the Video group options in Maintenance > Store Settings for more information.

Concept — Specifies the type of establishment or operation to associate with the item, if applicable. A concept is a type of branded operation that typically sells a focused line of products. Examples include coffee houses, ice cream parlors, donut shops, sandwich shops, to name a few. If you create items in a single master database, for multiple concepts, you can assign the item to a specific concept. For example, assign the item ‘banana split’ to the concept ‘ice cream parlor,’ if you sell banana splits only at your ice cream parlors. If you need to add or modify a concept, click Concept to access the Concepts function.
Modifiers Tab

Use the Modifier tab to attach up to ten modifier groups to an item, as well as define the behavior of an item if you use the item as a modifier. Each item in the system can function as a regular item, a modifier item, or both, depending on the needs of your establishment. Select the Modifiers tab from the Items function.

If Used as Modifier Group Box

Use the If Used as Modifier group box to define additional options when you use the item as a modifier.

Apply Surcharge — Applies a surcharge to the item when you order the item as a modifier for another item. Related Requirement: To define a surcharge, select Maintenance > Menu > Surcharges.

Combine price with base item — Combines the price of the modifier item with the price of the item being modified. If cleared, the price of the modifier and the price of the parent item appear separately on the order screen and the guest check.
**Highlight if Modifier** — Prints the item in reverse type on the chit, white on black on monochrome printers, and in red on color printers, when you order the item as a modifier for another item. **Related Option:** You must also select ‘Print only Selected Items in Red’ in Maintenance > Store Settings > Printing group > Chits tab to activate this feature with color printers. The item prints normally if you select this option and the item is not ordered as a modifier.

**Print Independently** — Prints the modifier on the chit in the same format as a regular item. Normally, a modifier item prints to the same printer as the item it is modifying; however, if you select this option, the modifier item prints to the specific printer group assigned on the Item tab.

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There are multiple, related options that also control how an item prints. Refer to the Printing-Chits group options in Maintenance > Store Settings for more information.

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**Modified By Group Box**

Use the Modified By group box to assign modifier groups to the selected item.

**Mod 1 through Mod 10** — Specifies the modifier group to attach to the item. The modifier group provides additional choices for an item. Example groups include ingredients, side items, temperature, and quantity, to name a few. You can attach up to 10 modifier groups to an item; however, you must first define a modifier group in Maintenance > Menu > Modifiers, before you can assign it to an item. If you need to add or modify a modifier group, click Modifier Groups to access the Modifier Groups function.
Price Tab

Use the Pricing tab to define the price for the item. There are multiple methods available for pricing an item, however, the pricing method you can use to price an item depends on the type of item itself. For example, you can only use the ‘Item Price’ method to price a basic gift certificate item. Select the Price tab from the Items function.

![Figure 4-5 Items - Price Tab](image)

**Price Level** — Designates the Price Level to use for the item. Price Levels enable you to assign a common price to items in a group. For example, if you sell all your medium soft drinks at the same price, you can assign the ‘Medium Soft Drink’ price level to each medium soft drink item you add to the system. When you have to change the price for your medium soft drinks, you can change the price of the ‘Medium Soft Drink’ price level, and every item to which you assigned the ‘Medium Soft Drink’ price level, changes accordingly. ‘Price Level’ is available only when you select ‘Price Level’ as the Price Method. If you need to add or modify a price level, click Price Level to access the Price Levels function.

**Price** — Specifies the price assigned to the individual item. This price is the lowest level in the pricing hierarchy.
**Quantity Pricing** — Accesses the Quantity Item Pricing function, which allows you to price the item based on the quantity or weight purchased by the guest.

**Miscellaneous Tab**

Use the Miscellaneous tab to define SKU numbers for an item, set video, guest count, token distribution properties, and more. You can also use this tab to store recipe information for an item. For example, you can store recipes for an item, upload pictures of how an item should look when served, and even store videos that show exactly how to prepare an item. Select the Miscellaneous tab from the Items function.

![Figure 4-6 Items - Miscellaneous Tab](image)

**Misc Group Box**

Use the Misc group box to define additional options for the selected item. Some options do not appear unless you enable another option or installed an additional program.

**Cash Card** — Designates this item is used to sell a cash card in the FOH.
**Gift Certificate** — Indicates this item is a gift certificate. **Required Options:** 1) To enable the ‘Gift Certificate’ option, you must make two selections in Maintenance > Store Settings > Gift Card/Certificate Sales group. First select ‘Use Gift Certificate Sales’ on the Gift Card Sales tab. Then you must select Back Office Gift Certificates from the ‘Gift Certificate Type’ drop-down list on the Gift Certificate Sales tab. **Related Requirement:** You must be licensed to use Gift Certificate Manager to enable any of these options.

**Revenue Item** — Specifies the item is not included in net and gross sales. For example, select this check box for such things as party deposits, amusement or slot machines, admissions, club dues, and more.

**Gift Card** — Indicates the item is a gift card item for selling. **Related Options:** 1) You must select ‘Use Gift Cards’ in Maintenance > Store Settings > Gift Card/Certificate Sales group > Gift Card Sales tab to enable the ‘Gift Card’ option. 2) The ‘Gift Card’ option enables the ‘Activate Card’ and ‘Add Value’ options, which apply to all gift card types except Aloha eCards. **Related Requirement:** You must be licensed to use gift cards to enable any of these options.

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Refer to the Aloha Feature Focus Guides for the guide specific to your gift card type, for more information on configuring and using gift cards.

**Activate Card** — Activates the gift card when it is approved by the card vendor, as this option applies to new and not yet activated cards. **Required Option:** You must select ‘Gift Card’ to enable this option. **Related Requirement:** You must be licensed to use gift cards to enable any of these options.

**Add Value** — Activates the gift card upon approval with the ability to add value to the card. Note: This option does not appear on the Miscellaneous tab example. **Related Requirement:** You must be licensed to use gift cards to enable any of these options.

**Video Group Box**

Use the Video group box to define options when using a video display system.

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Refer to the Interfacing Video Display Systems with Aloha User Guide for more information on configuring and using video.
**Do not show when item** — Prevents an item from displaying on the video screens when you order the item as a regular item, and not a modifier.

**Do not show when modifier** — Prevents an item from displaying on the video screens when you order the item as a modifier for another item.

**Show modifier independently** — Displays the modifier on the video screen in the same format as a menu item, even though the item is ordered as a modifier.

**Delay Time** — Specifies the amount of time, in seconds, that an item takes to prepare. The delay time is an indicator for the person preparing the food, to have items ready at a specific time. Use this option when one item takes longer to prepare than another. Typically, you specify a delay time for the item that takes the longest to prepare. This time displays on the video monitors to which any other items on the order are sent. When you bump an item with a specified delay time, the system initiates a countdown on the other video monitors. You cannot bump a delayed order until the countdown for the item with the delay time begins. If more than one item on the order has a delay time specified, the system uses the longest delay time.

Example: A pizza takes 10 minutes to cook. A salad takes one minute to prepare. Set the pizza to have a delay time of 10 minutes (600 seconds). When you bump the pizza, indicating start of preparation, the delay time of the pizza item is indicated on the video monitor where the salad displays. The delay time counts down to zero. The delay time indicates the time the pizza will be ready and enables the person preparing the food, to prepare the salad and have it ready at the same time the pizza is ready.

**Don’t show on Sum when item** — Prevents an item from displaying on the video summary cell, when you order the item as an item and not as a modifier.

**Don’t show on Sum when mod** — Prevents an item from displaying on the video summary cell, when you order the item as a modifier for another item. For example, you can hide cooking temperature modifiers, such as ‘Well Done’ from the summary cell.

**Show on Tracking Summary** — Enables the item to display on the kitchen video summary cell. If you do not select this option, the item does not appear on the video summary cell when ordered.

**Label Group Box**

Use the Label group box to assign a label to the selected item.
**Label ID** — Indicates the specific label to print when you order the item. Use this option if the item requires a printed label. If you need to add or modify a label, click Label to access the Label function.

**Item Weight Group Box**

Use the Item Weight group box to change the default weight for the item used for counting guests.

**Guest Count Weight** — Establishes the weight value of the item when counting guests by category. For example, you can set the guest count weight of an item named ‘Fajitas for Two’ so that it increases the guest count by two when a customer orders it. The default guest count weight is one (1). **Required Option:** This option works in conjunction with the ‘Use Entrees for Guest Counts’ option in Maintenance > Store Settings > Order Entry group > Guest Counts tab.

**SKU Numbers Group Box**

Use the SKU Numbers group box to associate a Stock Keeping Unit (SKU) number(s) for the selected item. You typically associate a SKU number with a product for inventory purposes. Additional entries allow you to assign more than one SKU number to an item. The SKU number must be unique across all records.

**Open Item Group Box**

Use the Open Item group box to define the requirements to use when the selected item is an open item.

**Ask for Description** — Indicates you want the FOH system to prompt for a description of the item when you order or sell the item. When you select this option, a keyboard appears on the FOH screen, allowing you to type a brief description of the item.

**Ask for Price** — Indicates you want the FOH system to prompt for a price for the item when you order or sell the item. When you select this option, a numeric keypad appears on the FOH screen, allowing you to type a price of the item.

**Print Tab**

Use the Print tab to define printing options for an item, such as how, and if, the item needs to print on a guest check or a chit.
Select the Print tab from the Items function.

There are multiple, related options that also control how an item prints. Refer to the Printing-Chits group options located in Maintenance > Store Settings for more information.

**Check Printing Group Box**

Use the Check Printing group box to determine if the item prints on the guest check.

**Print on check** — Prints the item on the guest check when you use the item as a modifier; otherwise, the item prints only on the kitchen chit.

**Chit Printing Group Box**

Use the Chit Printing group box to define additional options for printing on the chit.

**Highlight if Item** — Prints the item in reverse type on the chit (white on black on monochrome printers, and in red on color printers) when you use the item as a modifier for another item.
**Consolidate 1st modifier group** — Prints and consolidates modifiers based on the first modifier group of the item. This is for food items, such as steaks, which commonly have prep temperature as the first modifier group. The kitchen can then know how many steaks to prepare based on preparation time. **Related Option:** Use this setting in conjunction with ‘Consolidate Items with Different Modifiers’ in Maintenance > Store Settings > Printing group > Chit Appearance tab.

3 Ribeyes
2 MR
   1 Soup
   1 Salad
1 MW
    Soup

**Print in Bold** — Prints the item in bold on the chit.

**Justification** — Determines the printing justification on the guest check for the item. Available options are left, centered, and right, with left being the default.

**Token Distribution Tab**

Use the Token Distribution tab to specify specific items to distribute the number of tokens to the guest based on the subtotal of the check. Once you activate token distribution, all items are subject to the calculation of how many tokens to distribute to the guest based on the subtotal of the check; however, you can control the number of tokens to distribute for certain items, if you wish. For example, if you dispense four tokens for every dollar amount across the board and you want to dispense ten tokens if the guest orders your largest pizza, you can override the distribution number at the item level.

Refer to the Token Distribution Feature Focus Guide for more information on interfacing with a token dispenser.
Select the Token Distribution tab from the Items function.

**Override Token Calculation** — Specifies that this item distributes a different amount of tokens instead of the global amount defined in Store Settings > Token Distribution group. **Related Option:** You must select this option to enable the ‘Override Quantity’ option.

**Override Quantity** — Specifies the number of tokens to dispense when you order the item. **Required Option:** You must select ‘Override Token Calculation’ to enable this option.
Display Options Tab

Use the Display Options tab to specify the text, background, and bitmap to use when the item appears on system-generated panels for quick combo item selection and item substitution. When configured, the system uses a default grey background and black text color for all buttons on these panels, but when using a template panel, you can change these attributes. You can customize the display properties of individual buttons by assigning a bitmap to the button, changing the text color, and selecting a different background color.

Set Text Color — Specifies the color to use for the text on the button when the item appears on a quick combo system-generated panel. Click Color to select from the choice of colors.

Set Background Color — Specifies the color to use for the background of the button when the item appears on a quick combo system-generated panel. Click Color to select from the choice of colors.

Display Bitmap — Enables the ability to use a bitmap on the button when the item appears on a quick combo system-generated panel. Select the bitmap from the drop-down list.

Hide Text — Omit the item short name from appearing on the button, displaying only the bitmap. Required Option: You must select ‘Display Bitmap’ to enable this option.
**Quick Count Button** — Associates the item as a tracking item or composite tracking item in the system. The system counts every tracking item associated with a menu item each time you select the menu item in the FOH.

Refer to the Quick Count Feature Focus Guide for more information on configuring and using Quick Count.
Categories

The Categories function enables you to combine similar menu items into groups that you can use to track menu items for reporting and forecasting purposes. You can also use categories to effectively manage special item promotions and comps, or to support other features in QuickService, such as order modes, labor groups, and performance measures.

Although there are four different types of categories, there are two major category types: Sales and Retail.

A sales category is typically a consumable goods category, such as food and beverage items. Quite often, restaurants want to track the sale of their menu items, to know if a certain item is popular with customers, or if they need to replace it with a different menu item. Restaurants can assign a menu item to a sales category, and use various reports to quickly determine the sales level of a specific item. Very generic sales categories might be called Food, Beverages, Liquor, Beer, and Wine. Whereas, more specific sales categories might be called Coffee/Tea, Burgers, Sides, Appetizers, Desserts, or Fountain Drinks.

A retail category is typically for non-consumable goods, such as shirts, mugs, and other retail items. If a coffee shop wants to know how many coffee mugs they sell, in addition to their beverages, they can assign coffee mugs to a retail category, and use various reports to quickly determine the number of coffee mugs sold at their establishment.

Every item you add to the item database must be assigned to either one Sales or Retail category; otherwise, you receive errors when you attempt to validate your database.

Along with the two major categories, there are two sub-categories: Non-Sales and Suggestive.

You use Non-Sales categories in conjunction with the promotion and comp functions in Aloha. Each time you create a new comp or promotion, you need to indicate to which items in your database the comp or promotion applies. This ensures that you have control over the items included in your featured specials. For example, lets say you want to set up a comp for employees so they can purchase certain food items at 50% off the retail price. In this example, you create a non-sales category called ‘employee meal’ and assign only the items eligible for the employee comp discount to the ‘employee meal’ category. Later, when you set up an employee comp, you assign the
‘employee meal’ category to the comp. This way, when a server or cashier applies the comp to the employee’s guest check, only the items on the guest check that are included in the ‘employee meal’ category are discounted by 50%.

The ‘suggestive’ category is for Aloha TableService only. You use the suggestive category to bring special attention to those menu items you want servers to proactively promote to customers. For example, during the summer months, your restaurant may decide to offer cold specialty beverages. If you assign these specialty beverages to a suggestive category, the beverage items will blink on the FOH menu screens, to remind servers to promote these beverages to customers.

An item that is assigned to a sales or retail category can also be assigned to one or more non-sales or suggestive categories. Additionally, you can assign an item to as many non-sales and suggestive categories as necessary.

You can define up to 950 categories; up to 40 of those categories can be sales categories, while 910 can be a combination of retail, suggestive, and non-sales categories.

You cannot delete a category if it is assigned to a promotion, comp, order mode, or a performance measure.

Categories Quick Tips

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

- It is mandatory to assign every item to either one sales or one retail category.
- Items cannot be in more than one sales or one retail category. For example, if you assign ‘coffee’ to a sales category, you cannot assign ‘coffee’ to a retail category.
- It is not mandatory to assign an item to a non-sales or suggestive category.
- An item that is assigned to a sales or retail category, can also be assigned to one or more non-sales or suggestive categories.
- Items that are not placed in a sales or retail category are assigned automatically to the first sequential sales or retail category.
Select Maintenance > Menu > Categories to display the Categories function.

![Figure 4-10 Categories Function]

**Category** — Indicates the unique, five-digit number that identifies the category record. The category number is used in conjunction with the ‘Name’ to create a unique ID for each category record in the system.

**Description** — Defines a descriptive name for the category.

**PMS Sales Cat** — Used when a hotel property management system (PMS) is used in conjunction with the Aloha POS system. The PMS Interface enables the Aloha POS system to communicate with the hotel’s property management system. When this is the case, enter a category number (usually 1-4) that corresponds to the four Aloha categories in the PMS system. PMS categories are usually set up on a hotel’s property management system as follows: 1-Food, 2-Liquor, 3-Beer, and 4-Wine.

Refer to the Interfacing PMS with Aloha User Guide for more information on configuring PMS categories.

**AR Sales Cat** — Defines the Account Receivable (AR) sales category field in the Aloha Back Office Accounts Receivable product to which the current category reports.
Max per Check — Limits the number of times you can add an item from this category to the check. Enter a number between 0 to 999. If set to 999, there is no limit. When you exceed the defined amount of the same item on the check, the system checks if the employee has a sufficient access level to add more of the same item. If the employee does not have sufficient access, the Manager Approval screen appears. If the manager has sufficient access, they can enter their employee number in the Manager Approval screen to approve the addition of the item. Related Option: To enable an employee to approve the items over the limit, select ‘Override Category Limits’ in Maintenance > Labor > Access Levels > Employee tab, and assign the employee to the access level.

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

When using the Quantity function, or Quantity Item pricing with ‘Affects Inventory’ selected, the system enforces the limit based on the quantity you enter for the item. For example, if you enter Wings with a quantity of 20, but the category to which you assign Wings has a ‘Max per Check’ of 10, the manager approval screen appears, to get authorization for 20 Wings.

When using Quantity Item pricing with ‘Affects Inventory’ cleared, the system enforces the limit based on the number of times you add the item to the check. If Wings are set up as in the previous example, the manager approval screen appears on the 11th attempt to add Wings to the guest check.

Category Type Group Box

Use the Category Type group box to specify the type of category you are creating. The system currently has four types of categories from which to choose:

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

Retail — Groups related retail items, such as caps and shirts, for tracking and sales analysis. The system separates and tracks these item differently from food and beverage items. The results are available immediately through manager function keys on order entry terminals.

Non-Sales — Used primarily by other features, such as Order Modes, Promotions, Comps, or Performance Measures, as a qualifying parameter.
Category Selection Lists

The two selection lists in the dialog box are used to define categories. The list on the left side of the screen contains those items that are presently assigned to the selected category. The list on the right side of the screen contains the items in the Items file.

To add an item to a category:

1. Select the desired item or items in the list on the right. You can also double-click an item to move it to the opposing list box. To add more than one item at a time, hold down Ctrl and use the mouse to select multiple items in the list on the left.
2. Click Include. The item is copied to the list on the left indicating it is included in the category.

To remove an item or items from a category:

1. Select the desired item or items in the list on the left. You can also double-click an item to move it to the opposing list box. To add more than one item at a time, hold down Ctrl and use the mouse to select multiple items in the list on the right.
2. Click Remove. The item is copied to the list on the right indicating it is removed from the category.
Modifier Codes

Use the modifier codes allow you to communicate more information about a modifier to the kitchen staff, such as the preparation method, omissions, substitutions, and additions. When needed, you first select a modifier code, then the modifier relating to the code. The modifier code precedes the modifier on the screen and appears on the guest check, chit, and video screen.

The Modifier Codes function includes, and hard-codes, the standard set of modifier codes and sets them to active. You cannot delete any of the default modifier codes; however, you can change the active status and color of these modifier codes. To prevent a modifier code from appearing, select the code in Maintenance > Menu > Modifier Codes, and clear the ‘Active’ check box.

<table>
<thead>
<tr>
<th>Code ID</th>
<th>Default Modifier Code</th>
<th>Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>No</td>
<td>NO</td>
</tr>
<tr>
<td>3</td>
<td>Extra</td>
<td>XT</td>
</tr>
<tr>
<td>4</td>
<td>Side</td>
<td>SD</td>
</tr>
<tr>
<td>14</td>
<td>Light</td>
<td>LT</td>
</tr>
<tr>
<td>15</td>
<td>Heavy</td>
<td>HV</td>
</tr>
<tr>
<td>16</td>
<td>Only</td>
<td>ONLY</td>
</tr>
<tr>
<td>17</td>
<td>Half</td>
<td>1/2</td>
</tr>
<tr>
<td>18</td>
<td>Quarter</td>
<td>1/4</td>
</tr>
<tr>
<td>19</td>
<td>Add</td>
<td>ADD</td>
</tr>
</tbody>
</table>

Including the standard set, you can maintain up to 99 modifier codes. You can only define new modifier codes for IDs 20 to 99. For COM features using the interface, such as handheld devices, the system continues to synchronize the default codes, as appropriate, to retain existing functionality. For any new modifier codes, you must configure the COM interface to link to the new modifier codes.

When you configure modifier codes with the ‘Classic’ modifier screen setup, the FOH Modifier screen still displays four modifier codes, but now has left and right scroll arrows, where appropriate.

When you configure modifier codes for use with the system-generated modifier screen, the modifier screen displays all active modifier codes. If you add a modifier code to a panel, but the code is inactive, an error message appears when you select the modifier code.
When you use a user-defined modifier panel, the FOH operates as normal. You assign as many modifier codes as you want to a button. If you add an inactive modifier code to a panel, an error message appears when you select the modifier code.

On the FOH and BOH PMix report, the system updates the usage of the item according to the quantity defined for the code. For example, if you configured the ‘Heavy’ modifier code with a quantity of 3, then all modifiers applied with the ‘Heavy’ modifier code assume three times the portion sold.

Select Maintenance > Menu > Modifier Codes to display the Modifier Codes function.

![Modifier Codes Function](image)

**Figure 4-11** Modifier Codes Function

**Number** — Indicates the unique, two-digit number that identifies the modifier code record. A modifier code can range from 1 to 99. The system reserves IDs one to 19; however, you can create new modifier codes using IDs 20 to 99.

**Description** — Specifies the description, up to 20 characters, of the modifier code.

**Display Name** — Specifies the text, up to 20 characters, to appear on the FOH button. Type ‘\n’ between words to display text on separate lines.
**Indicator** — Specifies the text, up to four characters, to use as a prefix on the kitchen chit and guest check.

**Quantity** — Specifies the item count, from (-999.99) to 999.99, to remove from inventory when you apply the modifier code.

**Active** — Indicates the selected modifier code is in use.

**Color** — Defines the color to use for the modifier code. *Required Option:* You must select ‘Use Video’ in Maintenance > Store Settings > Video group > Video Setup tab to enable this option.

**Intensify** — Displays the selected modifier code to display in a brighter or more intense color. The normal 16 bit color display is changed to a 255 bit color display. *Required Option:* You must select ‘Use Video’ in Maintenance > Store Settings > Video group > Video Setup tab to enable this option.

**Reverse** — Displays the selected modifier code to display in reverse. For example, black text would display as white text. A white background would display as a black background. *Required Option:* You must select ‘Use Video’ in Maintenance > Store Settings > Video group > Video Setup tab to enable this option.

**Blink** — Causes the selected modifier code to blink while being displayed on the video screen. *Required Option:* You must select ‘Use Video’ in Maintenance > Store Settings > Video group > Video Setup tab to enable this option.
Modifier Groups

Modifiers are groups of items used to extend, alter, or further define menu items. Modifier groups have a circular relationship to items in that they are composed of items defined in the Items file, grouped into a modifier group, and then assigned to an item. Modifiers convey information to the kitchen when printers and remote display systems are in use. For example, lettuce, onions, and pickles are added to the Items file, collected into a modifier group called ‘Extras,’ then assigned to the ‘Hamburger’ item. If necessary, you can assign a price to a modifier item. For example, you can assign a price to a ‘bacon’ modifier, so that when a customer orders a hamburger with bacon, the price of the bacon posts to the guest check.

You can use modifiers to alter other modifier items. For example, you might have a salad as a modifier choice for a steak dinner item. That salad might also have a set of modifier choices, such as Salad Toppings, which include the dressings and other toppings commonly added to a salad.

When a ‘Hamburger’ item is added to a submenu, and a server selects it on an order entry terminal, a modifier can be selected from the ‘Extras’ modifier group. Using the features available in the Modifier Group function, you can control whether the modifier group appears automatically when the item in which it is attached is selected, or if you must select the Modify button to display the modifier group. You can also control other attributes, such as the minimum and maximum number of modifiers that are selected and the number of free modifiers. This linked method of building menus permits unlimited configuration options in the menu system.

Modifiers force cashiers to navigate through extra screens; which can sometimes slow down a cashier. For example, in a cafeteria setting the cashier does not need to modify an item with extra tomatoes unless there is a charge for extra tomatoes.

There are four common types of modifiers:

- **Ingredients** — An ingredient or topping that can be added or omitted per a customer's request. For example, onions on a hamburger, or sour cream on nachos. These groups are hardly ever forced unless encouraged and stated on the menu.

- **Sides** — A side that a customer has to choose to complete an entree or a combo. For example, french fries, salad, or vegetables are side modifiers. These groups are usually forced with a Minimum of 1, and a Maximum of 1.

- **Preparation** — A way in which an item is prepared or cooked. For example, a steak temperature. These groups are always forced with a Minimum of 1, and a Maximum of 1.
• **Quantity/Size** — A size, portion, or an amount. For example, a small, or a cup size for soup. These groups are always forced with a Minimum of 1, and a Maximum of 1.

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After you create a modifier group, remember to link the modifier group to the item(s) you want to modify. See the Maintenance > Menu > Items > Modifiers tab, for more information.

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**Modifiers Quick Tips**

There are several rules or tips to follow when you add a new modifier group:

- If you want to include an item in a modifier group, you must first add the item to the items database. Then, you can quickly and easily add the item to a modifier group. **Modifier group record numbers begin at 10,000 and end at 19,999.**
- You can price modifiers, as necessary. Keep in mind, the price of a modifier is not sensitive to the ‘No’ or ‘Extra’ modifier buttons. In other words, if you order ‘No Bacon’ using the ‘No’ and ‘Bacon’ modifier buttons, the price of the ‘Bacon’ (if there is a price assigned) does not change accordingly.
- If using a TableService modifier screen, do not forget to specify the minimum and maximum amount of modifier selections for an item.
- The ‘Screen Flow Required’ option forces the modifier screen to appear each time an applicable item is ordered.
- Modifier groups can modify other modifier groups. (e.g., a “salads” modifier group can modify a dinner entree item and a “salad toppings” modifier group can modify a salad.
- Do not forget to link the modifier groups to their applicable items, under Maintenance > Items; otherwise, the modifier group will not appear on the POS terminal when a server orders an applicable item.
Select Maintenance > Menu > Modifier Groups to display the Modifier Groups function.

**Modifier Group** — Indicates the unique, five-digit number that identifies the modifier group record. The modifier group number is used in conjunction with ‘Long Name’ to create a unique ID for each item record in the system. A modifier group number can range from 10000 to 19999.

**Short Name** — Indicates the abbreviated name for the record. The short name appears on the FOH order entry screen. The text is centered on the button; therefore, the length of the short name is a factor. The short name can be up to 15 characters; however, if you type over 11 characters, the short name might appear cropped on a button. As a solution, type ‘\n’ at the desired line break in the ‘Short Name’ text box to configure the short name to appear as two lines on a button. For example, type ‘Hot\nTamale’ to have ‘Hot’ appear on the top line and ‘Tamale’ appear on the bottom line of a button. Keep in mind, ‘\n’ takes up two of the allotted 15 characters.

**Long Name** — Indicates the formal, more descriptive name of the item record. The ‘long name,’ which can be up to 25 characters, is used in conjunction with ‘Modifier Group Number’ to create a unique ID for each modifier group record in the system. The ‘Long Name’ appears in reports and reporting features.
Min — Indicates the minimum number of modifiers that you can select when an item is ordered. The value can be 0 (zero). A number greater than zero forces the modifier selection screen to display, regardless if ‘Screen Flow Required’ is selected. The employee must select at least the ‘minimum’ number of items from the modifier group. If ‘Minimum’ is not set, then ‘Maximum’ does not need to be set. Related Option: The ‘Min,’ ‘Max,’ and ‘Free’ options use weights on items. To define a weight for an item, enter a weight in ‘Item Weight’ in Maintenance > Menu > Items > Miscellaneous tab.

Max — Indicates the maximum number of modifiers that you can select when an item is ordered. If both ‘Minimum’ and ‘Maximum’ are 0 (zero), an unlimited number is assumed; otherwise, this option must be equal to or greater than the value displayed for ‘Minimum.’

Free — Indicates the number of items from the modifier group that the customer can order at no charge. For example, if the value for ‘Free’ is set to 1, then the first modifier item is at no charge.

Substitute Group — Indicates a previously defined modifier group that contains items you can substitute for the items listed in the current modifier group. It is not necessary to select a substitute group, but if selected, the system places a Substitute button on order entry terminals.

Screen Flow Required — Forces the order entry terminal to automatically open the Modifier Group screen. Typically, the value in ‘Min’ would be greater than 0 (zero), forcing the server to select at least one modifier from the group. Required Option: You must select this option to enable the ‘Use Modifier Panel’ option.

Use Modifier Panel — Forces the order entry terminal screens to automatically open a modifier group screen on the FOH terminal from which to display the modifiers for the item. The order take must enter a modifier and touch either OK or Cancel to continue. Required Option: You must select ‘Screen Flow Required’ to enable this option. Related Requirement: You must use Panel Editor to create the Modifier Panel.

Show Keypad on Panel — Displays a numeric keypad on the modifier panel, which enables you to enter multiple entries of the same modifier. Required Option: You must select ‘Use Modifier Panel’ to enable this option.

Modifier Panel — Enables you to select the modifiers to add to the modifier group. Required Option: You must select ‘Use Modifier Panel’ to enable this option. Related Requirement: You must use Panel Editor to create a panel from which to display the modifiers for the item. Typically, you create a blank panel in Panel Editor and select the modifiers to display. This method enables you to use the panel for multiple modifier groups.
Modifier Item Buttons

The Modifiers dialog box contains button positions that are used to add items to the modifier group. Click the arrow button(s) to toggle between the button positions if more items are required for the modifier group.

Modifier items appear on order entry terminals in the order in which they are placed in Maintenance > Menu > Modifiers, therefore, you should consider the order in which order takers typically select modifiers.

To perform maintenance, such as delete, cut, copy, and paste, right-click the mouse on a button containing a modifier item. To move a modifier, click and drag the button to a new position.

To place a modifier item in the modifier group:

1. Double-click the desired **button position** to display the Modifier Item dialog box.

2. Select the **modifier item** to place on the button from the **Item** drop-down list.
3. Enter the **selection value** to use when determining if the ‘Max’ number of modifiers have been selected, in the **Weight** text box. For example, if the ‘Max’ for a vegetable modifier group is set to 3, and a salad with a weight of 2 is selected, only one more vegetable item with a weight of 1 can be selected. The selection value is typically one.
4. Select one of the following pricing options:
**Price** — Designates the button price should be used to price the item. Enter the button price in the text box to the right.

**Use Item Price** — Designates the price of the item as entered in Item Maintenance is used to price the item.

**Price Level** — Designates the price established in the assigned price level should be used to price the item. Select the price level from the drop-down list to the right.

5. Click **OK**. The modifier item appears on the modifier button.

**To delete a modifier from a group:**

1. Right-click the **button** containing the unwanted modifier.
2. Select **Delete**. The modifier is deleted from the modifier group.

**To move a modifier to a different button position:**

1. Place the **cursor** on the **button** and hold down the **left mouse button**.
2. Drag the **modifier** to a different location and release the **left mouse button**.
Panel Editor

Use the Panel Editor function to create and modify the panels that make up the FOH user interface screens for Aloha QuickService. Use this graphical tool to define panels, to position panels on the screen and buttons on the panels, and to assign actions and menu items to the buttons. You determine the look and behavior of the user interface screens by the choices you make when creating and placing panels on the screen.

Select Maintenance > Menu > Panel Editor to access the Panel Editor function. Here you place menu and function buttons on panels, which you then collected the panels to comprise screens in Screen Editor. The layout and design you choose dictates how your employees enter orders and determines the screen flow of your panels.

![Screen Matrix](image)

*Figure 4-14 Screen Matrix*
When you finish building your buttons, panels, and screens, your FOH screen displays your creation in the form of a functional working user interface.

Button Functions

The following lists each button function and its purpose:

(*) Denotes functions we recommend for managers or higher level employees to access. Most functions are controlled by the employee’s access level and job code. Refer to Labor Maintenance Functions, for more information on Access Levels and Job Codes.

Some button functions are available only for a specific type of panel.

Add Check

 Enables you to add a new separate check to an order.
**Adjust Tender** *

Enables adjustments to the tender information for a guest check that has been closed. The check must be recalled and displayed on the screen before the adjustment can be made.

**Adjust Tips** *

Enables adjustments to tip information for a guest check that has been closed. This is typically used for guest checks paid with a credit card. You must recall the check and display it on the screen before you can make the adjustment.

**Allow Clock-In** *

Enables an employee who is not scheduled to work or has clocked-out to clock-in again, if his/her job code has the ‘shift required’ check box selected. It also overrides labor scheduling constraints, if that program is in use.

**Allow Clock-Out** *

Allows you to clock an employee out before they are scheduled to clock out. It also overrides labor scheduling constraints, if that program is in use.

**Assign Day Part** *

Enables the employee to change the current day part and opens the FOH Select Day Part screen.

**Assign Drawer**

Enables the employee to self-assign a cash drawer and opens the FOH Select Drawer screen.

**Assign Driver** *

Opens the FOH Assign Driver screen with a list of the available drivers that may be assigned to an order. It is only used with Aloha Delivery/Frequent Buyer.

**Assign Pen ID’s** *

Opens the FOH Assign Pen ID screen and enables the employee to select an employee number to encoded pen used to log in. This is only used with Pen IDs.
**Automation Script** *

Enables the system to call or start a VB script from the FOH. 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 FOH terminals and be synchronized with the other updated directories from the file server.

![Automation Script](image)

**Figure 4-16 Automation Script Button Function**

**Script file to be run** — Specifies the command line to use for the automation script.

**Bitmap**

Assigns a bitmap to a button and is not used for order entry. Any bitmap found or added to the \Bmp directory is available. Common graphics are company logos.

**Break**

Opens the FOH Clock-Out screen enabling the employee to select a paid or unpaid break.
**Break In/Out** *

Opens the FOH Enter Employee Number screen to enable an employee to check in or out from a break, even though another employee is assigned to the terminal or drawer.

**Bump Video Order**

Bumps to the next order in the queue. This function works in conjunction with remote display systems.

**Calibrate** *

Realigns the pressure point on the POS terminal to coincide with the panel button.

**Chain**

Opens another panel or collection of panels. For example, a Burger button might chain to a Burgers panel containing buttons for all available burgers on the menu. The Chain function can also be used as a Back button to return you to a previous panel or to access other home screens by selecting multiple panels.

![Image of Chain Button Function]

*Figure 4-17 Chain Button Function*
**Screen View** — Displays a FOH representation of the panels added in the chain.

**Panels in Chain** — Lists the panels included in the chain.

**Add** — Displays the Panel dialog box in which to add panels in the chain.

**Delete** — Enables you to delete panels from the ‘Panels in Chain’ list box.

**Change Password**

Opens the FOH Change Password system screen, enabling an employee to change their password.

**Change Seat Name**

Enables you to change the name of a sub-order.
**Change Size**

Changes the item and modifiers associated with the item as defined as a size group in Maintenance > Menu > Size Groups. For example, you can change a small sandwich and the corresponding small portion ingredients defined as modifiers, to a large sandwich with large portion ingredients with one button selection.

![Figure 4-18 Change Size Button Function](image)

**Increment Size** — Increments the item to the next level according to the hierarchy of the size group. For example, a 12 oz. can soft drink (Item 1) increments to the next size group level of a 16 oz. can soft drink (Item 2).

**Decrement Size** — Decrement the item to the next level according to the hierarchy of the size group. For example, a large pizza (Item 1) is decremented to the next size group level of a medium pizza (Item 2).

**Index Offset** — Changes the item’s association based on a preset size group level defined in Maintenance > Menu > Size Groups. For example, an Index Offset of 3 indicates a small sandwich (Item 1) can be changed to a large sandwich (Item 3).
Check Info

Opens the Check Information screen and adds additional information to a defined text file in \Data. This function is used to capture a single line of information for such things as marketing or frequent dining information.

Figure 4-19 Check Info Button Function

**Prompt** — Specifies the text to appear as the prompt on the Check Information screen.
Checkout

Opens the “Are you sure you want to check out?” screen, enabling you to run the checkout process.

Automatically print checkout — Prints the checkout report when the employee has completed the checkout process.

Automatically open drawer — Opens the cash drawer when the employee has completed the checkout process.

Clear

Cleared all unordered items from the current check.

Clear Password *

Clears an employee’s password after you choose the employee from the FOH Select Employee to Clear Password screen. The next time the employee logs in to the FOH, a message displays indicating their password has been cleared and the employee’s ID number is used. Another password can be assigned using the Change Password button function.
Clock In/Out *

Clocks an employee in or out after you select them from the FOH Enter Employee Number screen, even though another employee is assigned to the terminal. An employee that has not checked out, can not be clocked out.

Clock Out

Enables you to clock out.

To add a clock out button:

1. Select Clock Out from the Function drop-down list. An additional option appears.

2. If necessary, select Skip Clock Out/Break screen to bypass the FOH Clock Out/Break screen. This is utilized in environments that use drawer checkouts.

3. Click OK.

Figure 4-21 Clock Out Button Function
**Close Check**

Closes the guest check.

![Figure 4-22 Close Check Button Function]

The Close Check function is usually included in scripts for tenders.

**Show change due box** — Displays a FOH message showing the change due to the guest.

**Selected (Single)** — Closes the current check if it does not have a balance due.

**All** — Closes all separate checks for an order at the same time, only if none of them have a balance due.

**Combine Order**

Enables the employee to combine two checks together and opens the Scan or Enter Receipt Number screen.
**Comp**

Applies the specified comp to the guest check.

![Comp Button Function](image)

**Figure 4-23 Comp Button Function**

**Comp Type** — Displays the list of comps to select for the button. If manager access is required, the system displays a password keypad.
**Custom Activity Interface**

Enables you to communicate with an externally integrated software package through COM interface.

*Figure 4-24 Custom Activity Interface Button Function*

**Information for external application** — Specifies the path to use for the interface program.
**Customer Information**

Allows assignment of a frequency member to the check.

![Image](image)

*Figure 4-25  Customer Information Button Function*

**eFrequency Member** — Enables you to assign an eFrequency member to the check.

**Frequent Buyer** — Enables you to assign a Delivery/Frequent Buyer member to the check.
**Customer Reward Report**

Prints a report with the bonuses a customer has earned.

![Customer Reward Report](image)

*Figure 4-26  Customer Reward*

**eFrequency Member** — Indicates the guest is an eFrequency member.

**Frequent Buyer** — Indicates the guest is a Delivery/Frequent Buyer member.
Delete

Behaves differently in the FOH, depending on the context in which it is used. If you select nothing on the guest check, the last unordered item on the check is deleted. 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.

![Edit Buttons - Quick Service](image)

*Figure 4-27  Delete Button Function*

**Previous Item** — Deletes the last ordered or selected item. This is the default selection.

**Previous Like Item** — Deletes the last ordered or selected item in conjunction with a button assigned with a quantity function. This function behaves the same way as ordering items in quantity. Ex: 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 with only 15.
**Delete All Items** *

Behaves differently for items that have been ordered and those that have not. The Delete All Items button deletes all items that have been ordered from the guest check in the same manner as Clear. However, if items have been ordered, the Void Reasons screen displays and a reason must be selected before the items can be deleted. In this scenario, the items are ‘voided’ from the guest check.

**Delete Checkout** *

Deletes an employee’s checkout after the employee is chosen from the FOH Select the Employee’s Checkout to Delete screen.

**Delete Clockout** *

Deletes an employee’s clockout after the employee is chosen from the FOH Select the Employee’s Clockout to Delete screen.

**Delivery**

Activates the delivery screens if using the Aloha Delivery/Frequent Buyer product.

*Figure 4-28 Delivery Button Function*
Order Type — Lists the order modes to assign to the button.

Delivery Information

Displays information regarding the delivery order, if the Delivery/Frequent Buyer is in use.

Disable Labor Schedule

Disables the Aloha Labor Scheduler product, if in use.

Dispense Tokens

Enables you to manually dispense gaming tokens when interfaced with the Token Distribution feature.

Display Order Total

Displays a ‘Your Total is...” message on the display board screen, followed by the balance of the current check. Most likely you will include this function in a script with the Send button function when display boards are in use. When you press ‘Send’ from the FOH the ‘Your Total is...” message displays. The message displays under the following conditions:

- An item is ordered on a new order.
- A new menu item is added to the current order.
- A comp, promo, tax exemption, or another element which affects the balance, is added to the current order.
The message disappears when you start a new order, or when the time set in the ‘Display Message for ___ Seconds’ text box expires. It does not display when you recall an order after a new check is started.

Display Message for ___ seconds — Specifies the number of seconds to determine how long the message displays before you start a new order.

**Drawer Checkout**

Enables you to run a drawer checkout report.

**Edit Break** *

Enables edits to an employee’s break after you select the employee from the FOH Select the Employee to Edit Break screen.

**Edit Time** *

Enables edits to an employee’s clock in and out time after you select the employee from the FOH Select the Employee to Edit Clock In Time screen.
**Eject Cash Card**

Ejects a cash card from a cash card device.

**End Of Day * **

Invokes the End-of-Day process.

---

*End-of-Day is usually performed as a scheduled event. The accidental selection of this button at the FOH starts a new day of business.*

---

**Enroll Fingerprints**

Enables you to enroll fingerprints into the Aloha system when interfacing with the Aloha Fingerprint Scanner.

**Enter Advance Order**

Displays the FOH Enter Advance Order screen to allow you to enter guest and order information for advance orders.

Refer to the Advance Orders Feature Focus Guide for more information on configuring and using this feature.

---

**Exit**

Logs the employee out of the system and returns to the logon screen.

**Force Tender * **

Enables the entry of credit card information without having to make a phone connection through the modem to receive credit card authorization. This is used when the file server goes down and you must tender a guest check.
**Get Check**

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

**Item Lookup * **

Invokes an item look up screen used for searching through all items whether they are defined on a panel or not. When the employee touches the Item Lookup button, a list of items and a keypad display. As the employee enters the item number or description, the list displays only items that match the characters the employee has entered. The employee can keep entering characters or choose an item from the list. After choosing an item, the item number, item description, and price display.

**JIT MGR 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 want to require manager approval, and select the access levels that can perform the function without manager approval. When you select the scripted button in the FOH, 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 displays and the screen returns to the order entry screen.

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 want to require a manager approval. Additionally, the text, background, and bitmap options on the Edit Buttons - JIT Approval dialog box do not display on the FOH when you do not include the JIT Approval button in a script.
Kodiak Entry

Makes a COM connection to get required data from a program outside of the Aloha system. This function is specific to the Kodiak Company, and signifies a charge at a set rate when entering the parking garage.

Kodiak Exit

Makes a COM connection to get required data from a program outside of the Aloha system. This function is specific to the Kodiak Company, and signifies an hourly rate charge when exiting the parking garage.

Manage Advance Orders

Displays the FOH Manage Advance Orders screen to allow you to view, print, and edit ordered and unordered advance orders.

Refer to the Advance Orders Feature Focus Guide for more information on configuring and using this feature.
**Manage Delivery Drivers** *

Opens the FOH Manage Drivers screen, listing the drivers for assigning orders, if the Delivery/Frequent Buyer is in use.

**Manage Delivery Orders** *

Opens the FOH Delivery Orders screen, listing all delivery orders, if the Delivery/Frequent Buyer is in use.

---

**Figure 4-31** Manage Delivery Orders Button Function

All — Displays all orders.

Unassigned — Displays all orders not assigned to a driver.

Assigned — Displays all orders assigned to a driver.

Enroute — Displays orders which are in route for a delivery.

Delivered — Displays orders which are delivered.

Closed — Displays orders which are closed.
**Manage Drawers** *

Opens the FOH Assign Cash Drawer screen to assign cash drawers and perform cash in/cash out transactions for all available drawers.

**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.

![Modifier Code Button Function](image)

*Figure 4-32 Modifier Code Button Function*

**Modifier Codes** — Lists the modifier code to assign to the button.

**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 displays with no modifiers to select.

**Name Order**

Displays a qwerty typewriter keypad so that an order can be named.
**New Order**

Opens a blank new order screen, however, the FOH can be defined to automatically display a blank new order screen for a particular order entry queue without having to press the New Order button. This is done using the Auto Open New Order check box located in Maintenance > System > Order Entry Queues.

![Edit Buttons - Quick Service](image)

*Figure 4-33  New Order Button Function*

**Suppress “Already on New Order” Error Message** — Prevents the FOH error message, “You are already on a new order” from displaying when you touch New Order and you are currently on a new order.
**Next Seat**

Activates the Sub-Order feature and enables you to divide a single guest check into several orders, each with the appropriate subtotals, taxes, and totals.

![Figure 4-34 Next Seat Button Function](image)

**Title for Seat Header** — Specifies the default text to appear on the guest check window when you do not type in a name for the guest, to show a separation between sub-orders.

**Prompt for Seat Name** — Allows you to enter a configurable name for the guest for each sub-order.

There are two configuration options when setting up sub-orders, ‘One Seat’ and ‘Two Seat.’ These options only come into play when you ask for the name of the first guest *after* you enter their requested items on the check. Both options automatically roll the entered items into a sub-order for the first guest, and display the FOH Enter Sub-Order Name screen to allow you to enter the name of the guest. The difference is that the ‘One Seat’ option requires you to touch another button to add a second sub-order to the check, where the ‘Two Seat’ option automatically places a second sub-order on the check and prompts you for the name of the second guest. FOH functionality is the same for both options, if you do not enter items on the check prior to asking for the name of the guest.
**One Seat** — Adds a single sub-order to the current check. Use this option if in your operation, you normally ask for the guest name before you enter their requested items on the check. If, for some reason, you enter items on the check before you ask for the guest name, the single sub-order inherits the items already entered and you must touch another button to add another sub-order to the check. **Required Option:** You must select ‘Prompt for Seat Name’ to enable this option.

**Two Seats** — Adds two sub-orders to the current check. Use this option if in your operation, you ask for the guest name after you enter their requested items on the check and you typically require more than one sub-order per check. The system prompts you to name the first sub-order and assigns the entered items to the first sub-order. Then the system prompts you to name the second sub-order and allows you to add items to the second sub-order. If you do not require the second sub-order, when you move to the next check, the system *copies* the second sub-order, along with the name, to the second check. You must add items to the copied sub-order before the system will remove the original sub-order from the first check. **Required Option:** You must select ‘Prompt for Seat Name’ to enable this option.

---

---

The ‘Two Seat’ option allows you to retain existing sub-orders functionality when you upgrade to v6.2.1 or higher. When using sub-orders in conjunction with split checks, we recommend you select the ‘One Seat’ option.

---

Sub-orders are very helpful in situations where several guests wish to see their separate totals and receive separate bags. Refer to the Sub-Orders Feature Focus Guide for more information on splitting a check into multiple sub-orders, one for each guest in a party.

---

**Open Drawer**

Opens the cash drawer.
**Order Item**

Adds a menu item to the current order.

![Order Item Button Function](image)

**Figure 4-35** Order Item Button Function

**Item** — Lists the menu item to assign to the button.
**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.

![Order Modifier Button Function](image)

**Figure 4-36** Order Modifier Button Function

**Modifier Item** — Lists the modifier item to assign to the button.

---

**Notes**

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.
**Order Type**

Specifies the order mode for the current order defined in Maintenance > Menu > Order Modes. You can assign a default order mode to an order queue in Maintenance > System > Order Queues. Assigning this eliminates the need to select the same order type for every transaction.

![Order Type Button Function](image)

**Figure 4-37 Order Type Button Function**

**Order Type** — Specifies the order mode to designate the order type to assign to the button.

**Other Wages**

Opens the FOH Other Wages screen to define hours or a dollar amount for such things as vacation time, for the current day.
**Play Video**

Activates an available .avi video clip most commonly used for training purposes.

![Play Video Button Function](image)

**Video File** — Specifies the path for an available .avi file, or click Browse to search the local hard drive for an .avi file.
**PLU List**

Opens a FOH numeric keypad for entering an item’s ID number, if known, to order.

![PLU List Button Function](image)

**Figure 4-39  PLU List Button Function**

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

**Chain to Open Item if not found** — 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 Items** — Lists the open item to associate 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 with a list of all items that have ‘Open Item’ selected in Maintenance > Menu > Items.

**PMS Check**

Enables the employee to start a check with a PMS room inquiry. This function is only available if PMS is in use and you select ‘Start Check’ option for the job code in Maintenance > Labor > Job Codes.
**PMS Inquire**

Enables inquiries about a guest’s status to determine information such as whether the guest is registered at the hotel and has the authority to charge orders to his or her room. Used with the PMS Interface product.

**Print Checkout**

Prints the checkout report.

![Print Checkout Button Function](image)

**Allow Any Checkout (not just closed)** — Prints the checkout report for the current employee whether all checks are closed or not.

**Print GST Tax Invoice**

Prints the guest check as a GST tax invoice if a GST tax is defined in the system. If the guest check total is less than the amount entered in the Amount text box located in Maintenance > Store Settings > International Group > Taxes tab, the guest check is automatically reprinted with the
title ‘Tax Invoice’. If the guest check total is equal to or greater than the amount entered in the Amount text box, the Special Message screen displays enabling you to enter the customer information to print on the tax invoice.

**Print Receipt**

Prints a receipt for the current order.

![Print Receipt Button Function](image)

*Figure 4-41 Print Receipt Button Function*

**Selected (Single)** — Prints the current check appearing in the guest check window.

**All** — Prints all separate checks for an order.
**Promo**

Applies the specified promotion to the guest check. **Note:** If manager access is required, the system displays a password keypad.

**Promo Type** — Lists the promotions to assign to the button.

**Promo Lookup**

Enables the FOH to select a promo to apply to the guest check. Only promotions that are ‘Active’, meet the start and end date criteria, and do not have ‘Do Not Show in Promo List’ selected in the Promotions dialog box display for selection.
**Quantity**

Applies a multiplier to a selected item or the last item ordered according to the number entered in the ‘Quantity’ text box.

![Quantity Button Function](image)

**Figure 4-43  Quantity Button Function**

**Quantity (0 for enter Qty)** — Designates the quantity multiplier for the quantity button. If 0 is entered, a FOH numeric keypad appears and a prompt for a quantity.

---

**Notes**

A button must be created for each different quantity.

---

**Append to current qty** — Enhances the function with the ability to select double-digit entries. For example, to ring up 12 burgers, touch 1 and 2.

**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 display on the FOH screen.
Query Gift Card Balance

Enables you to connect with the gift card host and query the remaining balance of a gift card. The balance of the card prints to the local receipt printer and does not display on the FOH screen. For TableService, you must add this button to a customized Action Item panel on the Order Entry screen.

Refer to the respective Feature Focus Guide for the gift card processor you are using for more information on querying a gift card.

Quick Combo

Applies a Quick Combo promotion to the guest check. The Quick Combo is defined in Maintenance > Payments > Promotions.

**Figure 4-44** Quick Combo Button Function

Promotion — Specifies the quick combo promotion to assign to the button. The components associated with the specific promotion display in the component drop-down lists.
**Component 1-10** — Specifies the component for the selected quick combo promotion. Select the default item to order when a guest purchases the quick combo or select ‘Choose’ to prompt the employee to choose a component.

💡 The FOH system dialog box and the buttons on it, are sized according to the number of choices and the size of the Quick Combo button that invokes it.

**Quick Combo Level**

Specifies the level at which the Quick Combo is sold and prepared. Use this for upgrading and down-grading the price and portions of the Quick Combo. For example, an order for medium fries and a medium drink can be upgraded to large fries and a large drink for $0.39 cents. The button function applies to all Quick Combos and the components for each level is defined in Maintenance > Payments > Promotions.

![Figure 4-45 Quick Combo Level Button Function](image)

**Level** — Specifies the quick combo level for the button. Select from Decrement, Increment, Normal, Upsell #1, and Upsell #2.
Quick Combo Toggle

Supports ‘conversational ordering’ between the guest and the cashier in a quick service environment and enables you to quickly construct and ‘break’ a quick combo with a single button touch. Most quick combos include a main entree, such as a burger or sandwich, a side dish, and a drink. The main entree is typically the primary item that motivates the guest in deciding whether to order the quick combo promotion at a reduced price or as a single item. Employees are also trained to suggestive sell a packaged meal, built off the main entree, to increase sales and provide the best experience for the guest. For this reason, you can enable the system to quickly build a quick combo based on the primary item of the promotion, and if the guest changes their mind, the system can ‘break’ the quick combo and return to the primary item.

Add components and apply Quick Combo — Determines if a selected item in the FOH guest check window matches the primary component of a quick combo, and, if so, adds the remaining default components to construct the corresponding quick combo. For example, if you select a burger in the FOH guest check window that is defined as the primary component for the ‘Burger’ quick combo, and then select the quick combo toggle button, the system builds the ‘Burger’ quick combo for you. **Required Option:** You must select Maintenance > Promotions > Payments > Type Specifics, and select ‘Primary’ for the required component of the quick combo.
**Remove components and Quick Combo** — Reduces a selected quick combo in the FOH guest check window back to the primary component defined for the quick combo. For example, if you select the ‘Burger’ quick combo in the FOH guest check window and a Burger is defined as its primary item, selecting the quick combo toggle button ‘breaks’ the quick combo and leaves the Burger on the check. **Required Option:** You must select Maintenance > Promotions > Payments > Type Specifics, and select ‘Primary’ for the required component of the quick combo.

**Toggle Quick Combo** — Specifies the button will toggle between the quick combo and its primary component, based on the current state of the promotion entered in the FOH guest check window. If you select an item defined as the primary component of a quick combo, and then the quick combo toggle button, the system adds the remaining default components to construct the corresponding quick combo. If you select the full quick combo, and then the quick combo toggle button, the system ‘breaks’ the quick combo and reduces the promotion to the primary item defined for the corresponding quick combo. **Required Option:** You must select Maintenance > Promotions > Payments > Type Specifics, and select ‘Primary’ for the required component of the quick combo.

**Quick Count** *

Configures counting options used with the Quick Count add-on.

---

*Figure 4-47 Quick Count Button Function*
Opening Counts — Opens the FOH Open Counts screen with the list of tracking items with ‘Open Counts’ selected, as defined in Maintenance > Quick Count > Tracking Items.

Add Counts — Opens the FOH Add Counts screen with the list of tracking items with ‘Add Counts’ selected, as defined in Maintenance > Quick Count > Tracking Items.

Usage Counts — Opens the FOH Usage Counts screen with the list of tracking items with ‘Use Counts’ selected, as defined in Maintenance > Quick Count > Tracking Items.

Waste Counts — Opens the FOH Waste Counts screen with the list of tracking items with ‘Waste Counts’ selected, as defined in Maintenance > Quick Count > Tracking Items.

Close Counts — Opens the FOH Close Counts screen with the list of tracking items with ‘Close Counts’ selected, as defined in Maintenance > Quick Count > Tracking Items.

Recall

Opens a FOH selection dialog box after a terminal is selected and permits a guest check to be recalled, with authorization.

![Figure 4-48 Recall Button Function](image)
All — Recalls all checks, whether they are opened or closed.

Open — Recalls only open checks.

Closed — Recalls only closed checks.

Use search feature — Displays an additional screen to recall a check by entering the first letter(s) of the name or the first number(s) of the check number.

Recall Next

Recalls the next available order in the specified queue.

Recall Next Open

Recalls the next available open order in the specified queue.

Recall Previous

Recalls the previous available order in the specified queue.

Refund *

Enables the ‘refund mode’ so a refund can be applied to a guest check. The refund mode orders items in negative entries on a new check. A Close Check function button usually has to be selected to close the check and revert back to positive entries. A refund is performed by opening and ringing up the selected refunded items on a separate check. The entries and subtotal display in negative amounts. Tenders do not read negative amounts so a close check must be performed.

Release Locked Employee *

Enables you to clear the .olk file that occurs when an employee logs in and allows the employee to log back into the system. This happens when the system loses connectivity when the employee was currently logged in. This issue only occurs with handhelds and devices running through COM.

Reopen Check *

Reopens a closed order from a closed order queue.
**Repeat**

Repeats the selected item(s) on the order.

**Report Break Alert * **

Displays the FOH Break Alert report, which shows employees who have worked continuously without a break, based on predefined rules.

**Report Daily Summary * **

Displays the FOH Daily Summary Report.

**Report Employee Breaks * **

Displays the FOH Employee Breaks report, which shows the break start and end times, with a cumulative total, per shift, for each employee. This allows store managers to easily manage the breaks their employees are required to take.

**Report Flash * **

Displays the FOH Flash Report, which contains numerous store statistics.

**Report PMix * **

Displays the FOH report of the day’s cumulative sales by menu item.

**Report Prep Projections * **

Displays a FOH report of tracking items sold for the day and the time frame in which they were sold. This function is used with the Quick Count.

**Report Quick Count * **

Displays the FOH report according to the tracking information. Each tracking item and composite tracking item with the ‘FOH Quick Count Report’ check box selected is included in the report. This function is used with the QuickCount.
**Report Restaurant Labor** *

Displays the labor costs by employee.

**Report Restaurant Sales** *

Displays the FOH report on daily sales.

**Reroute Display Board** *

Opens the Display Board Routing screen and enables the employee to alter display board routing.

---

![Reroute Display Board Button Function](image)

*Figure 4-49 Reroute Display Board Button Function*

**Define Reroute** — Allows you to preset a display board routing destination.

**Prompt Reroute** — Requires the system to display the FOH Display Board Routing screen so you can reroute display boards.

**Display Board** — Specifies the display board to reroute, excluding PCD 101s.

**Display from Terminal** — Specifies the terminal from which the display board displays.
**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 will regain control. If terminal 1 had an order on it, that order is immediately displayed to the board.

**Default Order Mode** — Specifies the order mode to use as the default when you reroute a display board.

**Reroute Printer** *

Opens the FOH Reroute Printers screen and enables the employee to alter printer routing.

**Reroute Printer Group** *

Opens the FOH Reroute Printer Group screen and enables the employee to alter the routing of a group of printers.
**Reroute Video** *

Opens the FOH Reroute Video screen, enabling the ability to alter video routing. This function is used with the remote display systems.

![Reroute Video Button Function](image)

**Figure 4-50  Reroute Video Button Function**

**Automatically perform reroute?** — Enables you to perform a video reroute using the targets you define in ‘From Video Queue’ and ‘To Video Queue.’

**From Video Queue** — Specifies the video to reroute from.

**To Video Queue** — Specifies the video to reroute to.
**Reroute Video Group** *

Opens the FOH Reroute Video Group screen, enabling the ability to alter the routing for a group of videos. This function is used with remote display systems.

![Figure 4-51 Reroute Video Group Button Function](image)

**Automatically perform reroute** — Enables you to perform a video group reroute using the targets you define in ‘From Video Group’ and ‘To Video Group.’

**Terminal** — Specifies the terminal for the rerouting.

**From Video Group** — Specifies the video to reroute from.

**To Video Group** — Specifies the video to reroute to.

**Review Lock**

Locks the displayed order in the review check panel(s). To unlock the order, touch Review Lock again.
**Review Next**

Displays the next available order displayed in the review check panel for the specified queue.

**Review Previous**

Recalls the previous available order displayed in the review check panel for the specified queue.

**Routing Level** *

Opens the FOH Routing Levels screen, providing overall control of where items waiting in a queue route to and from.

![Routing Level Button Function](image)

*Figure 4-52 Routing Level Button Function*

**Routing** — Specifies the routing level to use, as defined in Maintenance > System > Routing Levels.
Run Application

Enables the use of another application located on the file server. Common applications are Calculator, Microsoft Word®, and Microsoft Excel®.

![Run Application Button Function](image)

**Figure 4-53 Run Application Button Function**

Enter the application name and path — Specifies the path to the external application.

Pass Parameters — Bypasses any parameters that might be defined in the command line of the application.

Continue script immediately? — Bypasses 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 the FOH.
**Script**

Enables the use of multiple button functions scripted together in one button selection. The example provided is a typical script function for tendering a check.

*Figure 4-54  Script Button Function*
Click Edit to display the Edit Script dialog box.

![Edit Script Dialog Box](image)

**Figure 4-55** Edit Script Dialog Box

**Continue script on error or cancel** — Enables the script to continue if the selected function fails or asks for a confirmation.
Click Add to display the Select Function dialog box.

![Select Function Dialog Box](image1)

Select **Tender** from the list box and click **OK**. The Edit Script dialog box returns with the function appearing in the **Functions in Script** list box and the attributes appearing on the right.

![Edit Script With Tender Function](image2)

Select Tender from the list box and click **OK**. The Edit Script dialog box returns with the function appearing in the **Functions in Script** list box and the attributes appearing on the right.
Display the functions to perform in the order in which they are entered. It is important that they follow a logical procedure to perform correctly. For example, a check cannot be closed if the close function is defined before a tender function.

**Up and Down Arrows** — Allows you to re-sort the functions within the script.

**Parameters** — Displays in parenthesis after the function in the **Functions in Script** list box. The digit(s) before the comma designate the ID number for the record, as defined in its respective function, if applicable. The digit(s) after the comma designate additional selections made in the Edit Script dialog box for the selected function.

Click **OK** to return to complete the script and return to the Edit Button dialog box with the completed script.

![Edit Buttons - Quick Service](image)

*Figure 4-58  Script Function With Tender*

**Self Assign Delivery Order**

Opens the FOH Delivery Orders screen and enables the employee to assign delivery orders, if the ‘Delivery’ and ‘Self Assign Orders’ check boxes are selected for the job code. This function is used with Delivery/Frequent Buyer.
**Send**

Sends the current order to the kitchen with an order mode.

![Send Button Function](image)

**Include Suspended Items in Send** — Sends all items, including the items held in ‘suspend mode,’ to the kitchen. Use this option in an environment where you wish to allow each guest in a large party to pay for their check as they order. This ensures the items are not sent to the kitchen until you are ready. **Required Options:** 1) To place items in ‘suspend mode,’ you must first touch a button configured with the Suspend Items Toggle button function. 2) To define a suspended mode indicator to precede each suspended item, and appear in the corner of the FOH guest check window, type up to three characters in the ‘Indicator’ text box in Maintenance > Store Settings > User Interface > Order Screen tab.
**Server Sales** *

Displays the FOH Server Sales Report.

![Server Sales Button Function](image)

Figure 4-60  Server Sales Button Function

**Ask for Start and End Time** — Displays the FOH Select Start Time screen and defines a specific time for the Server Sales report to run.

**Ask for Occasion** — Enables the employee to choose an occasion. This is only applicable when using SuperSites.

**Shutdown Term** *

Shuts down terminals running Windows and passes through the Windows shutdown screen. This avoids corruption of the terminals.

**Sign In/Out Driver**

Signs a driver in or out on delivery runs, if Delivery/Frequent Buyer is in use.
**Smart Select and Smart Item**

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. This enables smaller, less confusing panels to be created. For example, let’s say your Items database contains the following soft drink items:

- Small Coke
- Medium Code
- Large Coke
- Kids Coke
- Small Diet Coke
- Medium Diet Coke
- Large Diet Coke
- Kids Diet Coke
- Small Dr. Pepper
- Medium Dr. Pepper
- Large Dr. Pepper
- Kids Dr. Pepper
- Small Sprite
- Medium Sprite
- Large Sprite
- 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.

For each new beverage, only one more button is required, therefore, the larger the variety of soft drinks that are offered, the more beneficial this feature becomes. The Smart Select button function defines the assorted sizes in the group. Smart Item 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 beverage is ordered in the FOH, touch the size button, then touch the desired drink. If you do not touch a size button first, the size established as the default is ordered.

*Figure 4-61* Sample FOH Smart Item and Smart Select

Place Smart Selects and Smart Items with the same Smart Group number on the same panel.
The following setup depicts the requirements to create Smart Selects for the Beverage Sizes Smart Group.

Figure 4-62  Smart Select Configuration Examples
The following setup depicts the requirements to create a Smart Item for a Coke button.

**Smart Select**

Designates the ‘Smart Group’ and ‘Smart Element’ associated with a Smart Item.

**Smart Group Number** — Specifies the smart group number to associate with the smart item function buttons. A group could refer to beverages or French Fry sizes. Small menus usually have very few smart groups.

**Smart Element** — Specifies the smart element to associate with the smart item function buttons. A smart element could refer to sizes, fluid levels, and more. Small, medium, large, and mega are all smart elements. Each time you order the smart item, the smart element is cleared to zero when you touch another button.

**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.
**Smart Group** — Specifies the smart group number in the associated Smart Select button function.

**Smart Element** — Designates the corresponding Smart Element, as defined in the Smart Select button function. For example, Item 9080 - Small Coke corresponds to the Smart Element 1 - Small.

**Item** — Designates the item to associate with the Smart Group and Smart Element. You must create an item for each variation in Maintenance > Menu > Items and placed in their respective order in the drop-down lists. For example, the employee touches a FOH Large Smart Select button, then a Coke smart item button to ring up a large Coke.

**Default Item** — Designates the default Smart Item selection when a Smart Select button is not chosen first in the FOH. For example, if a medium size is selected as the default french fry size, the employee touches the French Fry Smart Item button without a preceding Smart Select button function.

**Split Check**

Enables you to split an order into separate checks with a single button press. **Required Option:** To allow employees to split checks, select ‘Split Checks’ in Maintenance > Labor > Access Levels > Financial tab and assign the access level to the employee. **Related Options:** 1) To print the number of split checks on the employee checkout report, select ‘Print # of Check Splits’ in Maintenance > Store Settings > Printing group > Employee Checkout Cfg tab. 2) To allow employees to split checks with applied promotions, comps, or tax exemptions, select ‘Allow Split Promos, Comps, TaxExempt’ in Maintenance > Store Settings > Security group > Restrictions tab. 3) To restrict employees from moving applied payments from one split check to another, select ‘Cannot Move Payment Types’ in Maintenance > Store Settings > Security group > Restrictions tab.

**Store**

Adds the current order to the end of the queue. It would be used in a drive-thru environment where the order is stored but not yet closed.

**Suspend Items Toggle**

Enables you to place the current check into a ‘suspended mode,’ and does not send the items to the kitchen until needed. If you touch the button again while in suspended mode, the system exits the suspended mode and the items are sent to the kitchen, as normal. **Required Option:** To define
a suspended mode indicator to precede each suspended item, and appear in the top right corner of the FOH guest check window, type up to three characters in the ‘Indicator’ text box in Maintenance > Store Settings > User Interface > Order Screen tab.

**Tax Exempt**

Opens the FOH Tax Exempt screen to enter a tax exempt number.

**Tender**

Applies a specified tender to the guest check.

![Image of Tender Button Function]

**Figure 4-64 Tender Button Function**

**Tender ID** — Lists the tenders to associate with the button, as defined in Maintenance > Payments > Tenders.

**Automatically open drawer** — Opens the cash drawer when you select the tender. **Related Option:** The ‘Preopen Cash Drawer’ option in Maintenance > Store Settings > Security group > Cash Drawer tab overrides all tender buttons with this setting.
**Unassigned**

Designates there is no function assigned to this button. This is the default button function and is most often used as a panel heading or for future menu expansion.

**Volume Level** *

Enables the employee to change the Volume Level. This meets scenarios where management can alert the kitchen for preparation time when large unexpected parties arrive. It is also useful for locations in, or around, movie theatres.

This function is used with video display systems.

![Volume Level Button Function](image)

*Figure 4-65  Volume Level Button Function*

**Volume** — Lists the volume levels, as defined in Maintenance > System > Volume Levels.
Screen Editor

Use the Screen Editor function to comprise the first screen employees see when they log in to the system, using the Panel Editor tool. You can create as many screens as necessary and then you must assign them to specific job codes.

Select Maintenance > Menu > Screen Editor to display the Screen Editor function tab.

Refer to the Panel Editor Essentials User Guide for more information on using Panel Editor and designing your FOH user interface screens.
Taxes

The Aloha system can meet the needs of virtually any taxing jurisdiction. You can calculate taxes using a flat rate or tax breakpoints can be set up and utilized in a tax table. You also have the ability to define taxes for use with items that require conditional taxation when purchased in a variety of circumstances. For example, it is possible to charge no tax on a soft drink when it is ordered individually, and charge tax on it when it is ordered with food. In addition, you can identify a tax as a Goods and Services Tax (GST), which taxes every item on a guest check unless it is defined as an exempt item. You can define up to 999 taxes.

Select Maintenance > Menu > Taxes to display the Taxes function. The Taxes function provides the following tabs: Tax, Repeating, and Nonrepeating.

**Number** — Holds a two-digit number that together with ‘Description’ uniquely identifies each Tax ID record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Tax ID drop-down list, select the record to edit and press Enter.

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

Use the Tax tab to establish the name of the tax, the tax rate, and type of tax. You also set the minimum amount to apply to a check before a tax is applied, and whether the tax is a secondary or GST tax.

![Tax Maintenance](image)

*Figure 4-67 Taxes - Tax Tab*

**Description** — Displays a short descriptive name to identify the tax record.

**Tax Rate** — Designates the tax rate the system uses to calculate the tax amount. The ‘Tax Rate’ is used to calculate taxes using a flat-rate multiplier. It cannot be used for jurisdictions that require use of a tax table instead of calculations. The system calculates taxes for the defined record using the value placed in this field if all elements in the ‘Non-repeating Breakpoints’ and ‘Repeating Breakpoints’ arrays are set to zero.

**Minimum Amt** — Designates the minimum sale amount required before a tax is applied. The tax is not applied until the guest check total is more than the amount entered here. This is used in certain tax jurisdictions, such as the Canadian Province.
Secondary — Defines the tax method as a secondary tax that is used in conjunction with another tax method. It is required for some types of menu items in certain jurisdictions. The tax method is treated as a secondary tax. Secondary taxes must be exclusive.

GST — Defines the tax method as a Goods and Services tax (GST).

AR Tax ID — Interfaces with the Aloha Accounts Receivable product. There are eight tax rate text boxes located on the General tab in Accounts Receivable. These are labeled ‘POS Tax Rate 1’ through ‘POS Tax Rate 8.’ Enter the number, between 1 and 8, for the ‘POS Tax Rate’ text box that corresponds with this tax record.

Allow Tax Exemption — Allows you to include this tax in tax exemptions. To exclude this tax from tax exemption, clear this option.

Tax Type Group Box

Use the Tax Type group box to specify the tax type.

Inclusive — Calculated as part of the menu price. Inclusive taxes are included in the stated price of the menu item. Inclusive tax methods are typically used for alcoholic beverages.

Exclusive — Added to the price of the item. Exclusive taxes are over and above the stated price of the menu item. Exclusive tax methods are common for food.

Vendor — Indicates a special tax required in certain jurisdictions. This should be set if the primary tax method is a vendor tax.

To set up a basic primary sales tax record:

1. Select Maintenance > Menu > Taxes.
2. Enter an unused two-digit number and press Enter.
3. Type a short description of the type of tax record you are creating in the Description text box.
4. Select the appropriate tax type.
5. Type the numeric value (in decimals) of the tax rate you will use for this type of tax in the Tax Rate text box.
6. Enter the minimum sale amount required before a tax is applied in the Minimum Amount text box. You may acquire this figure from the tax tables you use to collect tax on sales at your establishment.
7. Select the appropriate **check boxes** to identify **Secondary** or **GST** taxes. If you select Secondary, the Exclusive box is automatically selected by the system. If you need to set up breakpoints, refer to the next section on non-repeating and repeating breakpoints.

Secondary taxes must be defined as exclusive taxes.

8. Click **Save**.
9. Exit the function to return to the main menu.

**Repeating Tab**

Use the Repeating tab for jurisdictions that use tables to calculate taxes rather than a straight tax rate. Non-zero values placed in the tables override the value set in ‘Tax Rate.’ If taxes are calculated using a tax rate, the values in ‘Repeating Breakpoints’ should be set to zero. Select the Repeating tab from the Taxes function.

Select the Repeating tab from the Taxes function.

![Figure 4-68 Taxes - Repeating Tab](image-url)
Nonrepeating Tab

Use the Nonrepeating tab to establish irregular intervals. To set the non-repeating breakpoints, enter whole number values into the boxes beginning from the upper left and reading across the screen. The values entered represent one-cent intervals beginning at zero and counting up. The value in the first box represents the number of one-cent intervals that have no tax. For example, if the first box contains a 7, then sales from 0.00 to 0.06 cents have no tax. The second box holds the number of one-cent intervals with .01-cent tax applied: a 12 in the second box means that sales from 0.07 cents to 0.18 cents have a 0.01-cent tax applied. The third box holds the number of one-cent intervals with 0.02-cents tax applied: a 12 in the third box means that sales from 0.19 cents to 0.30 cents are subject to a 2-cent tax.

Select the Nonrepeating tab from the Taxes function.

The system uses the values in ‘Non-repeating Breakpoints’ until it reaches a zero value. It then uses the values in the ‘Repeating Breakpoints’ table. Values are entered as in the ‘Non-repeating Breakpoints’ table; however, the calculations begin at the last value entered in ‘Non-Repeating Breakpoints’ rather than at zero.
Sufficient breakpoint values should be entered in ‘Repeating Breakpoints’ until a pattern is established. Tax methods are assigned to each item record, and before calculating taxes for a guest check, the system calculates a total for items assigned to the same tax methods and calculates the tax on the check for each tax type. This ensures that items with different tax methods are taxed at the proper rate, even when mixed together on a guest check.

To set up repeating and non-repeating tax tables:

1. Enter the correct **Tax Rate** in the appropriate box at the top of the Taxes function tab.
2. Locate the **Non-Repeating Breakpoints** section. Begin with the box in the top left corner. Enter the first amount that will be taxed.
3. Place the first amount where the tax will be applied in the first box of the Non-Repeating Breakpoints section. (The first number listed in the Amount of Sale column.) The first breakpoint is $0.10, because that is the lowest amount where a sales tax will be charged. The second breakpoint is determined by subtracting the lowest amount from the highest amount within that tax range (14 - 10 = 4).
4. Enter the second breakpoint in the box to the right and continue entries horizontally until you reach the end of the first row. Then begin the second row in the far left corner and continue across in a horizontal manner.
5. Once you establish the first two breakpoints, subtract the highest amount in the previous tax range from the highest amount in the next tax range (44 - 29 = 15).
6. Continue this formula until you reach the first ‘repeating breakpoint.’

<table>
<thead>
<tr>
<th>Amount of Sale</th>
<th>Tax</th>
<th>Breakpoint</th>
</tr>
</thead>
<tbody>
<tr>
<td>.10</td>
<td>.14</td>
<td>.01</td>
</tr>
<tr>
<td>.15</td>
<td>.29</td>
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<tr>
<td>.30</td>
<td>.44</td>
<td>.03</td>
</tr>
<tr>
<td>.45</td>
<td>.59</td>
<td>.04</td>
</tr>
<tr>
<td>.60</td>
<td>.74</td>
<td>.05</td>
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<td>.75</td>
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<td>.89</td>
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<tr>
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<tr>
<td>2.23</td>
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</tr>
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<tr>
<td>4.10</td>
<td>4.14</td>
<td>.28</td>
</tr>
<tr>
<td>4.15</td>
<td>4.29</td>
<td>.29</td>
</tr>
</tbody>
</table>

*Figure 4-70  Tax Breakpoint Table*
7. Once you establish the first repeating breakpoint, enter the **numbers** in the **Repeating and Non-repeating Breakpoints** tabs. Figure 4-70 shows the first repeating breakpoint at $4.10 - $4.14 (the $0.10 and $0.14 are the same as the first taxable amounts).

If the sample table were a complete Tax Bracket Table, it would continue to $20.00, where the tax would be $1.35 (based on 6.75%).
Flex Taxes

Flex taxes enable tax on items that require conditional taxation. This capability permits tax configuration for a variety of circumstances. You can set up a flex tax based on the condition that the tax will always be charged. You can also set flex taxes based on the quantity of an item, the guest check subtotal, or the particular category of an item. For example, it is possible to set the system to charge no tax on a soft drink when it is ordered individually and charge tax on the same soft drink when it is combined with other food items. **Required Option:** To select any flex tax as a secondary flex tax for an item, select ‘Use Secondary Taxes’ in Maintenance > Store Settings > Financials > Taxes & Surcharges.

For a more thorough understanding of how to configure flex taxes, please review the two examples contained later in this section.

**Before you can enable flex taxes, you must create all applicable primary tax records in Maintenance > Menu > Taxes.**

Select Maintenance > Menu > Flex Taxes to display the Flex Taxes function.

![Figure 4-71 Flex Tax Function](image-url)
**Flex Tax ID** — Holds a four-digit number that, together with ‘Description,’ uniquely identifies each flex tax record. To create a new record, enter an unused number, and press Enter. To edit an existing record, scroll through the ‘Flex Tax ID’ drop-down list, select the record to edit, and press Enter.

**Description** — Contains a descriptive name that identifies the flex tax record.

**Flex Type** — Defines the type of flex tax. The choices are:

- Always (0) — Applies to all items in the system.
- Quantity (1) — Applies to a specific quantity of items ordered.
- Subtotal (2) — Applies to a specific subtotal value of items ordered.
- Category (3) — Applies to a specific category of items ordered.
- Quantity by Category (4) — Applies to items based on the quantity of ordered items from a specific category.

**Always (0) Group Box**

Use the Always group box to apply the flex tax to all items in the system. **Required Option:** You must select Always from the ‘Flex Type’ drop-down list to enable this group box.

**Tax Id** — Determines the tax to calculate flex taxes on all items. For example, if you specify Always as the flex type, the Tax ID specified here is applicable at all times.

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

**Quantity (1) Group Box**

Use the Quantity (1) group box to apply the flex tax to a specific quantity of items. **Required Option:** You must select Quantity from the ‘Flex Type’ drop-down list to enable this group box.

**Is item quantity less than** — Determines the threshold of items you must order to apply this flex tax.
Subtotal (2) Group Box

Use the Subtotals (2) group box to apply the flex tax to a specific subtotal value of items ordered. **Required Option:** You must select Subtotal from the ‘Flex Type’ drop-down list to enable this group box.

Is check subtotal less than — Designates taxation based on a check subtotal threshold, below which tax will apply.

Category (3) Group Box

Use the Category (3) group box to apply the flex tax to a specific category of items ordered. **Required Option:** You must select Category from the ‘Flex Type’ drop-down list to enable this group box.

Do any items in this category appear on the check? — Designates taxation based on an item category. If you need to add or edit a category, click Category to access the Categories function. Changing a category changes all items to which it is assigned.

Quantity By Category Group Box

Use the Quantity By Category group box to apply the flex tax to items based on the quantity of ordered items from a specific category. **Required Option:** You must select Quantity by Category from the ‘Flex Type’ drop-down list to enable this group box.

Is category quantity less than — Designates taxation by an item quantity threshold below which tax will apply.

Chaining Group Box

Use the Chaining group box to specify one of the other flex taxes, depending upon the conditions defined by the tax laws in your area.

**Flex Tax Id #1** — Specifies a flex tax that becomes active when the terms specified in the Conditions group box are met. The flex tax specified in this field applies only if the specified conditions succeed.

**Flex Tax Id #2** — Specifies a flex tax that becomes active when the terms specified in the Conditions group box are not met. The flex tax specified in this field applies only if the specified conditions fail.
Size Groups

Size groups provide button consolidation on the FOH interface, and can accomplish a multitude of functions, such as bulk ordering, upselling, pizza ordering, and more. Place a default size of an item on a button and use this button for ordering. Then add function buttons to increment up, decrement down, and ‘leap’ to a specific size level. The function buttons change the size of the item and its price according to the size.

For example, a sandwich shop has three sizes of sandwiches. A small sandwich has two ounces of meat, and one pickle on a small bun; the medium sandwich has four ounces of meat, and two pickles on a six inch sandwich; the large sandwich has eight ounces of meat and four pickles on a twelve inch sandwich. Each modifier has a separate price associated with it based on the size of the sandwich.

You must create a size group for each of the following components:

- The menu item that will change size, in sequential order.
- All corresponding modifiers for the menu item.

Size Groups Quick Tips

- You must place all components of the size group in order of size for the sizes to properly increment and decrement.
Select Maintenance > Menu > Size Groups to display the Size Groups function.

*Figure 4-72  Size Groups Function*

**ID** — Indicates the unique, five-digit number that identifies the size group record. The size group number is used in conjunction with the ‘Name’ to create a unique ID for each size group record in the system.

**Description** — Defines a descriptive name for the size group, such as Sandwich.

**Item 1 through Item 10** — Indicates the specific sized item. Select item sizes from the item drop-down list, in descending or ascending order of their size. For example, ‘Small Coffee’, ‘Medium Coffee’ and ‘Large Coffee’ from smallest to largest. The item must coincide with its corresponding modifiers in the same order of size.
Surcharges

Surcharges are additional charges that occur when specific items are sold. It is primarily used in Florida where each alcoholic drink sold has a surcharge assessed to it. It is then up to the restaurant to decide whether they will explicitly charge the cost to the guest, or reduce it as a cost of business. If the restaurant is collecting the money from the guest, the charge shows up as a line item on the guest check. If the restaurant is not collecting money from the guest, the charge shows up as an expense and is deducted for the Net Sales calculation. When a surcharge is assessed on the item, the amount accumulates as a collected surcharge or a not-collected surcharge.

Surcharges are different from regular charges in that a surcharge is based on the quantity of the item sold instead of on the price of the item. Restaurants in some jurisdictions require a method to recapture surcharges on certain menu items. In many of these cases, the surcharges are actually additional flat-rate taxes levied on alcoholic beverages on a volume basis. For example, a state may have a surcharge of $13.50 per gallon on liquor. The Aloha system allows restaurant owners to recapture such taxes through the Surcharge feature.

Select Maintenance > Menu > Surcharges to display the Surcharges function.

Figure 4-73  Surcharges Function
**ID** — Holds a four-digit number that together with ‘Name’ uniquely identifies each Surcharge record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ‘ID’ drop-down list, select the record to edit and press Enter.

**Name** — Enter a name that uniquely identifies the surcharge.

**Tax Id** — Select a tax record from the drop-down list to apply to the surcharge. If you need to add or edit a tax, click Tax ID to access the Taxes function.

**Calculate As Percentage** — Calculates the surcharge as a percentage. **Related Options:** 1) You must select this option to enable the ‘Percentage’ text box. 2) If you do not select this option, enter a fixed amount in the ‘Amount’ option.

**Amount** — Holds a decimal number representing the flat rate, in dollars and cents, to apply to the price of items requiring a surcharge. In the case of a surcharge of $13.50 per gallon of liquor, the amount could be based on the apportioned amount of liquor served in a single drink: one ounce of liquor would require a surcharge of $10.55 cents to recapture the surcharge amount. This surcharge could then be assigned to all appropriate liquor menu items requiring a surcharge. **Related Option:** You must clear ‘Calculate as Percentage’ to enable this option.

**Percentage** — Enter a percentage of the item amount to use as a surcharge, such as ‘7.5’ for ‘7.5 percent.’ **Required Option:** You must select ‘Calculate as Percentage’ to enable this option.
Special Pricing

The Special Pricing submenu offers different methods of pricing an item. QuickService contains Quantity Pricing, which is at the top of the hierarchy when the price for an item is determined.

Quantity Pricing

Quantity Pricing enables an item to be priced by quantity or weight, such as a dozen hot wings or one pound of cole slaw. When you order the item, a prompt appears on the FOH order entry terminal enabling entry of the quantity or weight of the item. The system calculates the total price of the product based on the quantity entered or the weight (less the tare weight, if applicable) times the Unit Price established here in Quantity Pricing.

If you are using the Scales feature, the weight measurement is automatically brought forward to this Price column.

Select Maintenance > Menu > Special Pricing > Quantity Pricing to display the Quantity Pricing function.

Figure 4-74 Quantity Pricing Function
The command buttons enable you to add, edit, or delete items in Quantity Pricing. To edit or delete an existing item, first select the item, and click Edit or Delete.

To create a quantity item priced item:

1. Click **Add** to display the Quantity Item Price dialog box.

![Quantity Item Price Dialog Box](image)

2. Complete the **following information**:

   **Item #** — Enter the item number assigned to the item in Maintenance > Menu > Items.

   **Price per Unit** — Designates the price of the item per unit. The price depends on the unit of measure entered in the ‘Unit Name’ text box.

   **Unit Name** — Enter a descriptive name for the unit of measure. For example, if the ‘Unit Name’ is LB (pound), the ‘Price per Unit’ is the price of the item per pound. If the ‘Unit Name’ is DZ, the ‘Price per Unit’ is the price of the item per dozen.

   **Precision (# decimal points)** — Designates up to five decimal points that can be used by the FOH when the weight measurement is entered (i.e., a Precision set at 2 enables 2.53 pounds to be entered, and a Precision set at 3 enables 2.537 pounds to be entered).

   **Tare Id** — Identifies a pre-weighed container in which items are to be weighed for sale. The weight of this container is deducted from the weight entered in the FOH. Select a ‘Tare ID’ from the drop-down list.

Refer to the Scales and Tares Feature Focus Guide for more information on tare weights.
**Affects Inventory** — Indicates the item should be deleted from inventory.

3. Click **Save**. The Quantity Pricing dialog box displays to allow further maintenance.
4. Click **Done** and exit the **function**.
Price Levels

Use the Price Levels pricing method to define a common price to assign to items in a group. For example, all large soft drinks are the same price, regardless of the specific type. Create a price level called Large Soft Drinks and set the common price in the price level. The price level to use can be designated at the item level, the submenu level, and the modifier/exception modifier level. When the price is changed in the price level, all items set to that price level reflect the price change.

Select Maintenance > Menu > Price Levels to display the Price Levels function.

![Price Levels Function](image)

**Price Level** — Holds an unused number between 1 and 9999 that together with ‘Description’ uniquely identifies each price level. To create a new price level, enter an unused number and press Enter. To edit an existing price level, scroll through the ‘Price Level’ drop-down list, select the record, and press Enter.

**Description** — Enter a descriptive name to identify the price level.

**Price** — Enter a price to be charged for each item in the group.
Price Changes

The Price Changes function further enhances the flexibility in establishing a price for an item, price level, or promotion by temporarily changing the price for a specified time frame rather than manually accessing each item record, price level, or promotion, and modifying the price. A Price Change record can include a single selection or it can contain multiple selections of each type, therefore, creating a ‘batch’ price change. For example, you can use a price change to modify the price of a hamburger promotion that is sold at a reduced price on a certain day of the week.

You can also activate a ‘happy hour’ Price Change record to modify the price of all appetizers, and also include a change for the price level used for imported beer. This is accomplished using the ‘Set Price Change’ and ‘Disable Price Change’ events located in Maintenance > System > Events. Use the ‘Set Price Change’ event to activate the Price Change record whenever you want by using the Event Time and Type dialog box. Use the ‘Disable Price Change’ event to deactivate the Price Change record whenever you need to end the change on the same business day in which you activated it, but before the EOD.

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**Notes**

If a Disable Price Change event is not defined for a Price Change record, the Price Change record becomes inactive at EOD.

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To implement a Price Change record at the store, create an event that activates the Price Change record in the FOH. Refer to the System Maintenance Functions chapter for more information on configuring your events. When performing price maintenance through Price Changes, consider the following:

- When sending an item price change, price your items at the item level, as defined in Maintenance > Menu > Items. When using TableService, price the item at the item level instead of the submenu level.
- All priced modifier item pricing must be placed at the item level instead of the modifier level, if you are controlling modifier pricing at corporate.
- Set an event to activate the price change.

Select Maintenance > Menu > Price Changes to display the Price Changes function. The Price Changes function contains the following tabs: Items, Price Levels, and Promotions.
**Price Change** — Holds a four-digit number that together with ‘Name’ uniquely identifies each Price Change record. To create a new Price Change record, enter an unused number and press Enter. To edit an existing record, scroll through the ‘Price Change’ drop-down list, select the record to edit and press Enter.

**Name** — Enter a name to identify the price change.

**Start Date** — Establishes the first date in which the Price Change record should be in effect. When an event is fired, unless otherwise specified, it ends when the EOD process runs. The ‘Start Date’ and ‘End Date’ text boxes work in conjunction with the ‘Set Price Change’ event in Event Scheduler, and enable you to control the date, or range of dates, in which a Set Price Change event is active. These dates are used to fire up the event when the DOB occurs between the range of dates specified in the Price Change record activated by the event.

Do not leave the ‘Start Date’ or ‘End Date’ text boxes set at 00/00/00. If the price change occurs daily for an extended length of time, enter a date that occurs in the future.

**End Date** — Establishes the ending date for the price change. When an event is fired, unless otherwise specified, it ends when the EOD process runs. The ‘Start Date’ and ‘End Date’ text boxes work in conjunction with the ‘Set Price Change’ event in Event Scheduler, and enable you to control the date, or range of dates, in which a Set Price Change event is active. These dates are used to fire up the event when the DOB occurs between the range of dates specified in the Price Change record activated by the event.

You must click Edit to edit the options in the Price Changes function.
Items Tab

Use the Items tab to control pricing at the stores at the item level. When two or more stores price the same item differently, you can still maintain one master database by creating an item price change and sending the price change to the stores requiring the new price. The Price Changes method of pricing enables the corporate location to control the minimum price and set a recommended price for an item on a price change.

Locked — Indicates the store is restricted from changing the item price. The ‘Locked’ column only appears when you access the Price Changes function from the corporate location. Stores are unable to view the ‘Locked’ column.

Active — Indicates the price change for the item affects the price of the item in the FOH. If you clear the check box, the item uses the price defined at the item level.

Item ID — Indicates the ID of the item.

Item Name — Indicates the name of the item as defined in Maintenance > Menu > Items. All items in the Items file appear in the list.
**Min Price** — Indicates the minimum price the store can use for pricing the item. The ‘Min Price’ is not editable at the store level. A CDM administrator sets the minimum price for the item.

**Rec Price** — Indicates the recommended price of the item. A CDM administrator determines the recommended price, which cannot be less than the price set in the ‘Min Price’ column. Stores use the price in the ‘Rec Price’ column as a pricing guide.

**Price** — Designates the new price when the price change is in effect.

### Price Levels Tab

Use the Price Levels tab to control pricing at the stores at the price level. You can use price levels at your stores, even if your stores have different price levels. For example, if all your stores have the same menu item prices, with the exception of beverages, you can use price changes to change only the beverage prices for each store. In this case, you can still price your drinks with price levels. You can edit the price level through Price Changes, and send the new price change to the store to override the master price level. Use an event to activate the price change at each store.

Select the Price Levels tab from the Price Changes function.

![Figure 4-78 Price Changes - Price Levels Tab](image)
The list box displays all price levels and the price levels ID, as defined in Maintenance > Menu > Price Levels.

**Change Group Box**

**Active** — Activates the price override for the selection. However, the price change does not take effect until the batch is activated using the Set Price Change event.

**Price** — Designates the new price for the selection when the price change is in effect.

To deactivate an item price change, clear the ‘Active’ check box and click Set. If you do not click Set before saving, the price change will still be active.

Click Set to accept the price level change entered in the ‘Price’ text box and update the price in the selection list with the temporary price. Do not press Enter before clicking Set. If you do, Edit mode is exited and the list is not updated. An ‘x’ displays to the left of each item, price level, or promotion in which ‘Active’ is selected.

**Promotions Tab**

You can control the pricing on your promotions through Price Changes. For example, you want to lower the price on your happy hour promotion at a few select stores. You can edit the promotion price through Price Changes and activate the Price Change only at the stores that require the new price. You can edit only the promotion price, for a selected promotion.
Select the Promotions tab from the Price Changes function.

![Price Changes - Promotions Tab](image)

**Figure 4-79**  Price Changes - Promotions Tab

The list box displays all promotions and the promotion ID, as defined in Maintenance > Payments > Promotions. Select the **check box** under ‘Active’ for the promotion you want to edit, and then click **Edit** to change the promotion price for the selected promotion.

**Active** — Activates the price override for the selection; however, the price change does not take effect until you activate the batch using the Set Price Change event.

**Promo Price** — Designates the new price for the selection when the price change is in effect. If the promotion is defined as a percentage, specify the percentage in this text box. Percentages are entered as a number and two decimal places. For example, a percentage of 10% is entered as 10.00.

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- To deactivate an item price change, clear ‘Active.’
Payments Maintenance Functions

This chapter discusses creating and setting up payment tenders, promotions, comps, gift certificates, house accounts, and foreign currencies.

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Use the Payments function to define a variety of custom parameters, such as payment methods, customized tenders, promotions, comps, gift certificates, house accounts, and foreign currencies. You also set up automatic credit card authorization, pre-authorization, and online approval in Payments.

Select Maintenance > Payments to access the Payments menu.

Figure 5-1 Payments Drop-Down Menu
Tenders

Use the Tenders function to define the payment methods you plan to use in the Aloha POS system. Use this function to define the attributes of each tender, as well as parameters to handle cash and credit card payments. There are two main types of tenders: Cash tenders and non-cash tenders.

Cash Tenders

The following cash tenders are typically used in Aloha:

- $5
- $10
- $20

$5, $10, $20, etc

Specific denomination cash tenders specify the amount to apply as payment, when you select the tender on the FOH terminal. For example, if you create a $10 cash tender, the system applies a $10 payment to the guest check when you select the tender on the FOH terminal. You can create a cash tender for any amount.

Cash

Cash is a generic cash tender that uses a $0.00 default value. The $0.00 default value enables you to manually enter a tender amount on the FOH cash screen, when you select the Cash tender. If a Cash tender with a $0.00 default amount does not exist in the system, you must create one.

The FOH does not run unless a cash tender with a $0.00 default amount is defined.
**Exact**

Exact is a cash tender that applies a payment equal to the amount of the guest check. For example, if the total amount of a guest check is $4.32, the POS terminal applies a payment of exactly $4.32, when you select Exact as the tender method on the FOH terminal. **Required Option:** You must Type -$2 in the Default Amount text box, in order for this option to function correctly.

**Next**

Next is a cash tender that rounds a payment up to the next dollar amount. For example, if the total amount of a guest check is $4.32, the POS terminal applies a payment of $5.00, when you select Next as the tender method on the FOH terminal. **Required Option:** You must Type -$1 in the Default Amount text box, in order for this option to function correctly.

**Non-Cash Tenders**

The following non-cash tenders are typically used in Aloha:

- Cash Card
- Credit Card
- Debit Card
- House Account

**Cash Card**

Cash Card is a non-cash tender you create when your business uses a cash card device to accept payments.

**Credit Card**

Credit Card is a non-cash tender you create when your business is set up to accept credit card payments as a payment method. You can create a credit card tender for each type of credit card your establishment accepts (i.e., AMEX, VISA, Discover, and more). You can also create a generic Credit Card tender; however, if you choose this tender method, any payment reports you run will not break out credit card payments by credit card type.

**Debit Card**

Debit Card is a non-cash tender you create when your business is set up to accept debit card payments as a payment method.
**House Account**

House Account is a non-cash tender you create when your business lets customers set up personal or business accounts. House accounts enable you to charge meals or other items to a special account, that the customer can settle at a later time. You can also use a house account tender to charge employee meals to a separate account, and settle the account at a later time.

When you add a tender, you must select the appropriate tender type on the Type tab, in order to activate the new tender; otherwise, the POS will not apply payment when you attempt to use the tender on the FOH terminal. For example, if you create a $20 tender, you must also select ‘Cash’ on the Type tab, in order to activate the new $20 tender.

After you create tenders, use the Panel Editor feature in Maintenance > Menu > Panel Editor to place tender buttons on the FOH terminal.

Refer to the Panel Editor Feature Focus Guide for more information on configuring and using panels and screens.

Select Maintenance > Payments > Tenders to display the Tenders function. The Tenders function provides the following tabs: Tender, Type, Identification, Authorization, Back Office, Reconciliation, and Security Verifications.

**Number** — Indicates the three-digit number that, combined with ‘Name,’ uniquely identifies the tender record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ‘Number’ drop-down list, select the record and press Enter.
Tender Tab

Use the Tender tab to determine tender requirements, such as default amounts, tip allowance, and overpayments. Select Tender from the Tenders function.

![Tender Maintenance](image)

**Figure 5-2 Tenders - Tenders Tab**

**Name** — Indicates the specific name for the tender, such as $5, $20, AMEX, VISA, Cash, and more. You must define at least one cash tender that does not have a default amount assigned. This option has a maximum of 10 characters.

**Report As** — Defines the tender in which you want to report sales paid with this tender. For all cash tenders, you should report them all with the ‘Cash’ tender, unless you want to track how many times you accepted a certain denomination, such as a $100.00 bill.

To report a tender as itself, save it, then access the tender and select it from the ‘Report as’ drop-down list.

**Printer** — Specifies the printer on which an extra copy of the closed check prints. Select a printer from the drop-down list. If you need to add or modify a printer, click Printer to access the Printer Group screen.
**Default Amt** — Defines the default amount to apply as payment, when you select the defined tender on the FOH terminal, and speeds up the payment process. For example, type ‘10.00’ for the ‘$10’ denomination tenders, and so forth. Type ‘-2’ for the ‘Next Dollar’ tender, ‘-1’ for the ‘Exact Change’ tender, and ‘0’ for the Cash tender. If you need to add or modify a category, click **Category** to access the Categories function. When you modify a category, the change applies to all items assigned to that category.

---

If you do not type a default amount when you add a tender, the POS system always prompts you for a payment amount each time you use the tender, on the FOH terminal.

---

**Active** — Makes the selected tender type active, and places the corresponding tender button on the order entry terminals in the defined button position. Only one tender type can occupy a button position at any one time.

**Track** — No longer used by the system.

**Can Refund** — Indicates you can perform a refund for the selected tender. For example, if you want to implement refunds for a gift card tender, you must select this option; otherwise, you cannot perform a refund on a gift card tender. You must select this option for Non-cash tenders that allows refunds. **Related Option:** You can perform credit card refunds even if you clear ‘Can Refund,’ as long as you also clear ‘Authorize Using EDC’ on the Authorization tab.

**Affect Deposit** — Indicates the tender affects the over/short calculation of deposits. Select this option for tenders, such as cash and personal checks. Clear this option for tenders such as credit cards.

**Print Check On Close** — Sets the tender type to automatically print a copy of the guest check when you close the check. If you select this option for the default ‘Cash’ tender, the system automatically includes all other cash tenders, such as the $5.00, $10.00, and $20.00 tenders. Any guest check closed with these tenders, by themselves, or together, causes a guest check to print because they are defined as cash tenders.

**Open Drawer On Close** — Automatically opens the cash drawer when you close the check. If cleared, the drawer does not open. **Related Option:** To override this option and allow the drawer to open, even for checks with a $0.00 total, select ‘Allow Auto-Open on Zero Total Checks’ in Maintenance > Store Settings > Security group > Cash Drawers tab.

**Print Signature Line** — Prints a signature line on the guest check. This is a useful option for house accounts.
**Remove Tip Line if Auto Gratuity** — Removes the tip line on the credit card voucher if automatic gratuity is applied to the check.

**Overpayment Group Box**

The Overpayment group box enables you to define parameters for overpayment with the selected tender. For example, if the guest pays with a non-cash payment and wants ‘cash back,’ select ‘Allow Overpayment’ and define the requirements for the cash back.

**Allow Overpayment** — Permits employees to enter an amount greater than the guest check total when they tender the check, therefore, allowing the customer to receive cash back. The excess amount can be limited to a percentage of the guest check or it can be a set dollar amount.

**Limit By Percent** — Defines the amount entered in ‘Excess’ as a percentage, not a set dollar amount. **Related Option:** This option forces you to enter a percentage amount in the ‘Excess’ text box, instead of a set dollar amount.

**Excess** — Specifies the maximum amount or percentage you can offer the guest as cash back. You can enter a decimal percentage if you selected ‘Limit By Percent’ (.20 = 20%), or you can enter a set dollar amount (10.00 = $10.00).

**Manager Can Always Overpay** — Prompts for manager approval when employees enter a tender amount greater than the guest check amount. **Related Options:** To define overpayment of tenders, select ‘Allow Overpayment.’

**Auto Fix Without Prompt** — Enables the system to automatically correct an overpayment on a check, without a confirmation message. This applies for non-cash tenders, excluding gift card and gift certificate tender types, for which you do not allow overpayments. When an overpayment situation occurs due to a reduction in the check after you have already applied the payment, such as a void, the system corrects the overpayment without a confirmation prompt to which you must respond. **Related Option:** This option is disabled when you select ‘Allow Overpayment.’

**Provide Change** — Calculates change for the customer for this tender type and displays the change due.

**Tips Group Box**

The Tips group box allows you to define the tender as tippable and the maximum tip percentage.
**Allow Tips** — Allows you to add a tip to the selected tender. Typically, you select this option for credit card tender types. If cleared, the system does not prompt you to enter a tip, print a tip line, or allow you to adjust a tip for payments made with this tender. **Related Option:** The ‘Disable Tips’ option in Maintenance > System > Revenue Centers > Options tab overrides this options for the particular revenue center.

**Maximum Tip %** — Specifies the maximum allowable tip percentage you can enter as a percentage of the total sale for the defined tender type. Enter 0.50 for a 50% maximum percent figure.

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The ‘Maximum Tip %’ is not enforced if set over 100 percent.

---

**Type Tab**

Use the Type tab to specify the type of tender, such as cash, credit card, cash card, house account, or debit card. You can also establish requirements for voucher printing, foreign currencies, options for magnetic stripe cards, and enable the system to check for expiration dates. Select the Type tab from the Tenders function.

![Figure 5-3 Tenders - Type Tab](image-url)
Cash — Defines the tender as a cash tender.

Check — Defines the tender as a check. This selection may be used to define personal checks or travelers checks.

Cash Card — Defines the tender as a cash card.

House Accounts — Defines the tender as a house account. **Related Requirement:** You must define house account records in Maintenance > Payments > House Accounts to use house accounts.

Debit — Defines the tender as a debit card. Debit card charges are immediately taken out of the bank account if the account has sufficient funds. **Related Option:** To mask the full or partial debit card number from appearing on the voucher, make a selection in the ‘Credit Card Number Mask’ option in Maintenance > Store Settings > Credit Card group > Voucher Printing 2 tab.

Refer to the Debit Cards Feature Focus Guide for further information on configuring and using debit cards.

Gift Card — Defines the tender as a gift card. Select Gift Card and a gift card host from the drop-down list.

Refer to the Aloha Feature Focus Guides for the guide specific to your gift card type, for more information on configuring and using gift cards.

Credit Card — Defines the tender as a credit card. Select credit card and a processor from the drop-down list. **Related Option:** To mask the full or partial debit card number from appearing on the voucher, make a selection in the ‘Credit Card Number Mask’ option in Maintenance > Store Settings > Credit Card group > Voucher Printing 2 tab.

Refer to the Aloha EDC User Guide for more information on configuring and using credit cards.
**IVR Phone #** — Holds the Integrated Voice Response (IVR) number used to dial Stored Value Systems for authorization when the system cannot connect. **Required option:** You must use Stored Value System gift cards and select Stored Value Systems from the ‘Gift Card’ drop-down list.

Refer to the Stored Value Systems Gift Card Feature Focus Guide for more information on configuring and using Stored Value Systems gift cards.

**Foreign Currency Group Box**

Use the Foreign Currency group box to define the foreign currency to use for the selected tender.

**Foreign Currencies ID** — Specifies the foreign currency to use for the selected tender. If you need to add a foreign currency, click Foreign Currencies ID to access the Foreign Currency function.

**Voucher Printing Group Box**

Use the Voucher Printing group box to define requirements for the voucher printing of the selected tender.

**Do not print vouchers** — Suppresses vouchers for non-cash tenders from printing. Select this option when you do not need a signed voucher from the guest when you use this tender, such as meal discount cards.

**Apply Signature Line Rules for Vouchers** — Prints a signature line on the voucher if the transaction amount exceeds the amount specified for the ceiling. **Required Option:** You must define the ceiling amount to require a signature line in ‘Ceiling’ in Maintenance > Store Settings > EDC group > Options tab. **Related Option:** When selected, the ‘Do not print vouchers’ option is not available because the voucher always prints.

**Options Group Box**

Use the Options group box to define additional options for the selected tender.
Use Magnetic Card ONLY — Prevents all employees from manually entering a gift card or credit card number when applying a payment. The system prompts for a manager password when they attempt to manually enter the number. Related Option: To override this setting for a certain employee and allow them to enter the gift card number without manager approval, select ‘Manual Card #’ in Maintenance > Labor > Access Levels > Financials tab and assign the access level to the employee.

Expiration — Sets order entry terminals to automatically prompt for a credit card or gift card expiration date. Related Option: This option enables the ‘Verify Expiration’ and ‘Print Expiration’ options.

Verify Expiration — Checks the credit card or gift card expiration date against the system date to automatically verify the card has not expired. Required Option: You must select ‘Expiration’ to enable this option.

Print Expiration — Prints the credit card or gift card expiration date on the guest check. Required Option: You must select ‘Expiration’ to enable this option.

Verify Signature — Displays a prompt to request all employees to verify the signature on the voucher against the signature on the card, when you apply a payment with this tender.

Disable Masking in Grind Files — Does not mask credit card numbers in the grind files. Selecting this option does not enable the system to be CISP compliant. You should only select this for troubleshooting purposes and clear the option when you finish troubleshooting.

Always Display Tender Screen — Automatically displays the appropriate tender screen when you slide a card across the mag stripe reader with the Automatically Detect Card Type feature. Use this option if you want the employee to verify or change the amount applied to the card. If cleared, the system sends the full amount of the transaction upon swipe. Required Options: You must select ‘Automatically Detect Card Swipe’ in Maintenance > Store Settings > User Interface group > Order Screen tab to use this feature.

Chip ‘N Pin Reader ID Required — Prompts for the entry of the chip and pin reader device ID, when you close the check in the FOH. The employee then takes the device to the guest, who enters their PIN number, amount, and tip, using the chip and pin reader device.

Refer to the Chip and PIN UK Implementation or Chip and PIN Dutch Implementation Feature Focus Guides for more information on configuring and using a Chip and PIN device.
Identification Tab

Use the Identification tab to define the identification requirements for cards, such as the prompt to display on the FOH tender screen, the prefix numbers for the card type, and validate customer IDs.

Select the Identification tab from the Tenders function.

![Identification Tab](image)

**Figure 5-4  Tenders - Identification Tab**

**Require Identification** — Displays an Identification prompt on the FOH tender screens and forces all employees to enter identification information, such as the minimum and maximum number of digits for the card number. You cannot close the check if the requirements specified in this tab are not met. **Required Option:** You must select a non-cash tender to enable this option. **Related Option:** This option enables the rest of the options on this tab.

**Prompt** — Indicates the text to display on FOH tender screens and prompts you for ID information, such as ‘Card #.’ **Required Option:** You must select ‘Require Identification’ and a non-cash tender to enable this option.

**Minimum** — Specifies the minimum number of digits allowable for the defined credit card. **Required Option:** You must select ‘Require Identification’ and a non-cash tender to enable this option.
**Maximum** — Specifies the maximum number of digits allowable for the defined credit card. 
*Required Option:* You must select ‘Require Identification’ and a non-cash tender to enable this option.

**Numeric Only** — Toggles the type of keypad displayed on FOH terminals, when the system requests AVS code entry. Select this option to display a numeric keypad, or clear it to display an alphanumeric keypad. *Required Option:* You must select ‘Require Identification’ and a non-cash tender to enable this option.

**Print On Check** — Prints the tender ID on the guest check. *Required Option:* You must select ‘Require Identification’ and a non-cash tender to enable this option.

**Validate** — Validates the number entered on the order entry terminals against a user-defined list of IDs. *Required Option:* You must select ‘Require Identification’ and a non-cash tender to enable this option.

**Valid** — Indicates whether the user-defined IDs represent valid IDs or invalid IDs. *Required Option:* You must select ‘Require Identification’ and a non-cash tender to enable this option.

### Prefix Checking Group Box

Use the Prefix Checking group box to define the prefix numbers for the card so the system can quickly determine and validate, by card type.

**Prefix 1 through Prefix 4** — Defines valid number prefixes for the credit card tender type up to the first eight digits. These prefixes are used in the validation process. It is not necessary to enter prefixes for predefined credit card types. *Required Option:* You must select ‘Require Identification’ and a non-cash tender to enable this option.

**Digits To Validate** — Designates how many digits at the beginning of a credit card number to validate. For example, many major credit cards can be recognized by the first four digits; therefore, you would enter the number 4 in this option. *Required Option:* You must select ‘Require Identification’ and a non-cash tender to enable this option.
Authorization Tab

Use the Authorization tab to configure authorization characteristics and requirements. Select the Authorization tab from the Tenders function.

![Figure 5-5 Tenders - Authorization Tab](image)

Require Authorization — Enables an authorization prompt on order entry screens.

Prompt — Text that displays on order entry terminals prompting for the authorization number, such as ‘Authorization #.’

Maximum Length — Defines the maximum length of the authorization code for the defined credit card. If the authorization number is greater than zero, a message stating ‘Must enter auth code’ displays.’ If the maximum length is set to zero, the system accepts blank authorization codes.

Print On Check — Prints the authorization code on the guest check.

Authorize Using EDC — Specifies Aloha EDC is used for credit card authorization.

Allow PreAuth With EDC — Specifies Aloha EDC is used for credit card pre-authorization.
Back Office Tab

Use the Back Office tab to define tender requirements for the Property Management System (PMS), Aloha Accounts Receivable, Delivery, and Gift Certificate add-on programs. Select the Back Office tab from the Tenders function.

Figure 5-6  Tenders - Back Office Tab

PMS Settings Group Box

Use the PMS Settings group box to define tenders to use for a PMS interface and reporting.

Refer to the Interfacing PMS with Aloha User Guide for more information on configuring and using PMS.

PMS — Allows the PMS in use to use this tender type to report sales. Related Option: This option enables the rest of the options in this group box.

PMS Tender ID — Specifies the corresponding tender ID from the PMS interface. Required Option: You must select ‘PMS’ to enable this option.
**PMS Room #** — Designates a default room number prompt, when you use this PMS tender to apply a payment. *Required Option:* You must select ‘PMS’ to enable this option.

**Allow Offline Posting** — Enables offline posting for the PMS tender when the Aloha POS systems cannot connect to the PMS. *Required Option:* You must select ‘PMS’ to enable this option.

### Accounts Receivables Group Box

Use the Accounts Receivables group box to define options to use for the Accounts Receivable add-on program. Tenders that must pass their information to BackOffice applications do not function unless you configure these options.

**Accounts Receivable** — Causes the system to pass tender information to BackOffice applications for processing outside the Aloha system. Enable this option if this tender is to be used with the Aloha Accounts Receivable software interface.

**Verify Customer Data** — Prompts you to use the BackOffice database to verify data when you use this tender type.

**Print Reference on Receipt** — Prints the reference information entered in the FOH when you close the guest check. This is determined by the Reference Entry text box in the Accounts Receivable program. Enter 0 to not display a FOH prompt. Enter 1 to display a FOH prompt with an optional entry. Enter 2 to display a FOH prompt with a required entry.

**Print Balance On Receipt** — Prints the customer’s balance from the Aloha Accounts Receivable program on the receipt when you use this tender type.

**AR Field On Receipt** — Enables you to select another field from the customer’s accounts receivable information to print on the FOH receipt. The choices are ‘None,’ ‘Card Number,’ ‘Phone Number,’ or ‘Company Name.’

### Gift Certificates Group Box

Use the Gift Certificates group box to define options to use for the Aloha Gift Certificate Manager program.

Refer to the Aloha Gift Certificate Manager User Guide for more information on gift certificates.
**Gift Certificate** — Designates this tender as a gift certificate used with Gift Certificate Manager.

**Delivery Group Box**

Use the Delivery group box to define options to use for the Aloha Delivery Frequent Buyer program.

Refer to the Aloha Delivery/Frequent Buyer User Guide for more information.

**Use Saved Credit Card** — Enables the system to store credit card information for customers in a delivery operation.

**Reconciliation Tab**

Use the Reconciliation tab to set up an over or under amount for tenders used for the reconciliation features. If you select any of these options, the system includes the tender reconciliation process.

Refer to the Drawer Reconciliation or Employee Reconciliation Feature Focus Guides for more information on configuring and using the reconciliation features.
Select the Reconciliation tab from the Tenders function.

![Tenders - Reconciliation Tab](image)

**Figure 5-7** Tenders - Reconciliation Tab

**Variance Group Box**

Use the Variance group box to define the amount this tender can differ for reconciliation, whether you enter details or only totals, or have the system auto populate totals for reconciliation.

**Variance Amount Allowed** — Defines the currency amount this tender can differ when verifying amounts for reconciliation. The variance amount applies to over and under the amount entered for reconciliation. **Required Option:** You must configure the system to use the reconciliation feature to benefit from this option.

The system recognizes the variance amount from the first cash tender with $0.00 defined in the ‘Default Amt’ text box. Variance settings for all other cash tenders are not necessary and are invalid. If you entered an amount in ‘Default Amt’ and ‘Variance Amount Allowed,’ the system ignores the variance amount and the ‘Variance Amount Allowed’ text box becomes unavailable after you save the tender.

**Enter Details** — Enter transaction detail when running reconciliation. For example, if the tender is defined as a personal check, you must enter each individual check. **Required Option:** You must configure the system to use the reconciliation feature to benefit from this option.
**Enter Totals** — Total amount must be entered when running reconciliation. For example, if a tender is defined as a Visa credit card, you must enter the total amount of all Visa transactions, without itemizing. This is the default selection. **Required Option:** You must configure the system to use the reconciliation feature to benefit from this option.

If you select the ‘Cash’ check box, ‘Enter Details,’ ‘Enter Totals,’ and ‘Auto Fill’ are not accessible on the Type tab. These options are ONLY available for non-cash tenders.

**Auto Fill** — Populates all reconciliation fields without the need for the employee to enter the amount. This scenario would be for operations that only verify payments. **Required Option:** You must configure the system to use the reconciliation feature to benefit from this option.

If you select the ‘Cash’ check box on the Type tab, ‘Enter Details,’ ‘Enter Totals,’ and ‘Auto Fill’ are not accessible. These options are ONLY available for non-cash tenders.
Security Verifications Tab

Use the Security Verifications tab to establish the security features for non-cash payments, such as the address verification, security code and the start date the card is issued to the cardholder. Select the Security Verifications tab from the Payments function.

Address Verification Group Box

Use the Address Verification group box to enter the zip code of the cardholder for the selected tender.

**Enter Address Verification Code** — Requires you to enter the cardholder’s zip code for the credit card tender. The system includes the zip code in the files sent to the processor; therefore, could reduce the credit card fees imposed by the credit card processor. You must determine if the Aloha system is certified for AVS verification with the processor in use. **Related Options: 1)** You must select ‘Require Identification’ in Maintenance > Payments > Tenders > Identification tab to enable the options in the Address Verification group box. **2)** To allow an employee to override the entry of the zip code, select ‘Override Security Verification’ in Maintenance > Labor > Access Levels > Financials tab and assign the employee to the access level.
All Cards — Requires you to enter the zip code for all transactions, whether you enter the card number manually or electronically. Clear the option to only prompt for the zip code for manually entered card numbers.

# of Characters — Defines the minimum number of characters, or digits, you can enter for the zip code.

Numeric only — Requires you to always enter numeric entries for the zip code from a numeric keypad. Clear the check box to allow characters from an alphanumeric keypad.

Prompt — Specifies the text to prompt for the zip code on the FOH Security Verification screen. You can enter up to 20 characters.

Security Code Group Box

Use the Security Code group box to enter the zip code of the cardholder for the selected tender.

Enter Security Code — Requires you to enter the security code located on the back of credit cards, such as the CVV or CID. The system includes the code in the files sent to the processor; therefore, could reduce the credit card fees imposed by the credit card processor. Related Options: 1) You must select ‘Require Identification’ in Maintenance > Payments > Tenders > Identification tab to enable the options in the Security Code group box. 2) To allow an employee to override the entry of the zip code, select ‘Override Security Verification’ in Maintenance > Labor > Access Levels > Financials tab and assign the employee to the access level.

All Cards — Requires you to enter the security code for all transactions, whether you enter the card number manually or electronically. Clear the option to only prompt for the security code for manually entered card numbers.

# of Digits — Specifies the number of characters, or digits, you can enter for the security code.

Prompt — Specifies the text to prompt for the security code on the FOH Security Verification screen. You can enter up to 20 characters.

Start Date Group Box

Use the Start Date group box to enter the date the card was issued to the cardholder.
**Enter Start Date** — Requires you to enter the date the card was issued to the cardholder. The system includes the start date in the files sent to the processor; therefore, could reduce the credit card fees imposed by the credit card processor.

**All Cards** — Requires you to enter the start date for the card, whether you enter the card number manually or electronically. Clear the option to only prompt for the start date for manually entered card numbers.

**Prompt** — Specifies the text to prompt for the security code on the FOH Security Verification screen. You can enter up to 20 characters.
Tender Groups

Use the Tender Groups function to enable you to group tenders together to restrict employees from using a tender, or a group of tenders, by their access level. Define a tender group in which a group of employees can use to tender checks, and associate the tender group to an access level, such as ‘Cashiers.’ This feature is mainly used to restrict non-cash tenders, but you can exclude certain cash denominations from a tender group. The system does not safeguard against the employee entering multiple cash tenders to achieve a higher denomination. For example, if you want to require approval for $100.00 bills, the employee can still receive a $100.00 bill, but enter five $20.00 bills to equal $100.00.

Select Maintenance > Payments > Tender Groups to display the Tender Groups function.

**Figure 5-9  Tender Groups Function**

**Number** — Holds a three-digit number that together with ‘Name’ uniquely identifies each tender group record. To create a new record, enter an unused promotion ID and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record to edit and press Enter.

**Name** — Specifies the name of the tender group.
**Available** — Holds the list of tenders available to add to the tender group record. Select the tender from the ‘Available’ list box, and click Include to move the tender to the ‘Included’ list box.  

*Related Requirement:* To define a tender, access Maintenance > Payments > Tenders.

**Included** — Holds the list of tenders included in the tender group record. Employees can only apply the tenders in this group without manager approval.
Promotions

Promotions is a comprehensive feature set that allows the configuration of a wide array of promotions to fit every need. There are six different types of promotions. You define each one in a separate secondary dialog box specific to the type. These promotions are created in conjunction with the categories defined in Maintenance > Menu > Categories. Promotions are placed on the FOH using the Panel Editor feature accessed in Maintenance > Menu > Panel Editor.

Categories are the cornerstone in the promotions structure, and you must have a full understanding of them to get the most from the promotions features. Promotions are defined in terms of categories, and depending on the needs of the restaurant, it may be necessary to create special non-sales/non-retail categories just for use in promotions. For example, a rib dinner normally sells for $8.99, but using a coupon, a discount of $2.00 can be applied. Items can only belong to one sales category, and if the rib dinner is already included in a sales category, it is recommended that a non-sales category that includes only the rib dinner be created. Select this category when setting up the promotion, therefore, limiting the promotion to only the rib dinner.

Select Maintenance > Payments > Promotions to display the Promotions function. The Promotions function provides the following tabs: Promotions, Taxes, Restrictions, and Token Distribution.

**Number** — Holds a five-digit number that together with ‘Name’ uniquely identifies each promotion record. To create a new record, enter an unused promotion ID and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record to edit and press Enter.
Promotions Tab

Use the Promotions tab to define the dates of the promotion and the type of the promotion, bar code range values, validation codes, and more. Individual promotion dialog boxes are accessed from this tab through the Type Specifics button. Select the Promotions tab from the Promotions function.

Name — Holds a unique name to identify the promotion record.

Type — Specifies the promotion type.

Refer to “Promotion Types” on page 5-36 in this chapter for a listing of promotion types and how to configure each type.

Type Specifics Button — Accesses the configuration options for the promotion selected in ‘Type.’ Each type of promotion displays a dialog box specific to the selected type. For example, if you select a BOGO promotion in the ‘Type’ drop-down list, the BOGO promotion dialog box
displays. For a more complete discussion information about each of the available promotion types, refer to the Promotion Types section in this chapter. **Required Option:** You must select a promotion type in ‘Type.’

**Start Date** — Specifies the day the promotion begins in the mm/dd/yyyy format. It is not necessary to use the four-digit year; the last two digits are sufficient.

**End Date** — Specifies the last valid day of the promotion in the mm/dd/yyyy format. It is not necessary to use the four-digit year; the last two digits are sufficient.

**Max Amount** — Defines the maximum amount of discount allowable per check.

**Report As** — Defines the promotion in which you want to report sales applied with this promotion.

To report a promotion as itself, save it, then access the promotion and select it from the ‘Report As’ drop-down list.

**Active** — Activates the promotion. **Related Option:** You can also activate promotions by an event and override this option.

**Print Check** — Prints a copy of the guest check immediately after using this promotion, for the guest to view.

**Manager Needed** — Requires a manager to apply the promotion. **Related Option:** This option is overridden if you select ‘Auto Apply’ in the Type Specifics configuration for the promotion.

**eFrequency Real Time** — Defines the promotion as a real-time promotion to use with the eFrequency rewards program, and disables most of the options available on the Promotions tab.

Refer to the eFrequency User Guide for more information on configuring promotions for use with eFrequency.

**Do Not Show in Promo List** — Designates the promo is not to appear in the promo dialog box.

**Apply Gratuity** — Enables the system to apply a gratuity to the guest check, after adding the selected promotion to the check.
**Bar Code Range Values Group Box**

Use the Bar Code Range Values group box to use bar codes with your promotions, specifically printed coupons, assists you with the lookup of the promotion, therefore, allowing you to apply the promotion to the guest check very quickly. Use bar code range values to establish a valid range of SKU numbers for the promotion. For example, you can set up a range of coupons with the same restrictions and reductions to apply to the check. The coupon must have a SKU number and bar code label and the lowest and highest values must have the same number of digits.  

*Required Option:* To use bar code scanners, select ‘Use Bar Code Scanner’ in Maintenance > Hardware > Terminals > Readers tab, for the terminal with the scanner. *Related Option:* When scanning promotions with a bar code reader, the system reads the SKU number in Maintenance > Menu > Items > Miscellaneous tab first, then the promotion SKU number.

**Lowest Value** — Establishes the lowest number in a range to support a bar code scan for the promotion.

**Highest Value** — Establishes the highest number in a range to support a bar code scan for the promotion.

**Validation Group Box**

Use the Validation group box to check the validation code of the promotion and whether you can enter numeric entries only. You cannot use this feature with a quick combo promotion, or any promotion in which you specify ‘Auto Apply.’

**Enter Validation Code** — Requires you to enter the validation code of the promotion.

**Numeric Only** — Requires you to enter only numeric values for the validation code.

**Length** — Specifies the length of text you can enter for the validation code.
Taxes Tab

Use the taxes tab to define any type of tax applied to the promotion. Select the Taxes tab from the Promotions function.

**Guest Pays Tax** — Requires the guest to pay the tax on the promotion. If cleared, the restaurant pays the tax.

**Surcharge Promo Amount** — Applies a surcharge to the promotion amount. Select this option only if using surcharges. *Related Requirement:* To define a surcharge, select Maintenance > Menu > Surcharges.

**Primary Taxes Group Box**

Use the Primary Taxes group box to assign a primary tax to the promotion and other tax requirements.

**Tax Applied Before Promotion** — Applies the primary tax to the full amount of the promotion. The system calculates the tax on the original item price before applying the promo.
**Tax Food Cost** — Uses the percentage defined in the ‘Food Cost’ text box to apply a tax amount on the food cost in the promotion. *Required Option:* You must define a tax percentage in ‘Food Cost.’

**Food Cost %** — Defines a tax percentage (entered as a decimal), to use to calculate an approximate food cost. *Required Option:* You must select ‘Tax Food Cost’ to enable this option.

**Tax ID** — Assigns the selected tax to apply to the promotion. Some jurisdictions require the restaurant to pay the tax on all promotions. Thus, one way to track promotion tax amounts is to create a special tax method called Promotions/Comps. If you need to add or modify a tax, click **Tax** to access the Taxes function. When you modify a tax, the change applies to all areas assigned to that tax. *Related Requirements:* To define a tax, select Maintenance > Menu > Taxes.

### Secondary Taxes Group Box

Use the Secondary Taxes group box to apply a secondary tax to the promotion amount.

**Tax Applied Before Promotion** — Applies a secondary tax to the promotion amount. The system calculates the tax on the original item price before applying the promo.

### Vendor Tax Group Box

Use the Vendor Tax group box to apply a vendor tax to the promotion.

**VTax Promo Amount** — Applies the vendor tax to the full amount of the promotion.

**VTax Food Cost** — Uses the percentage defined in the ‘Food Cost’ text box to apply a vendor tax amount on the food cost in the promotion. *Required Option:* You must define a tax percentage in ‘Food Cost.’

**Food Cost %** — Defines a tax percentage (entered as a decimal), to use to calculate an approximate food cost. *Required Option:* You must select ‘VTax Food Cost’ to enable this option.
Restrictions Tab

Use the Restrictions tab to define the limitations on the promotion, govern how comp items are handled with the promotion, and how other promotions affect it. Select the Restrictions tab from the Promotions function.

Promo Restrictions Group Box

Use the Promo Restrictions group box to set restrictions on promotional items applied with the promotion.

Promo Items Eligible — Indicates items already defined as promotions are eligible for inclusion in the promotion being defined.

Allow Prior For Check — Allows multiple promotions on the same guest check.

Allow Subseq For Check — Allows subsequent promotions on the check to be eligible for the defined promotion.

Figure 5-12 Promotions - Restrictions Tab
Comp Restrictions Group Box

Use the Comp Restrictions group box to set restrictions on comp items applied with the promotion.

**Comp Items Eligible** — Allows comp items to be eligible for the defined promotion. Clear this option if comp items are not permitted.

**Allow Prior For Check** — Allows multiple comps on the same guest check.

**Allow Subseq For Check** — Allows subsequent comps on the check.

Other Options on the Restrictions Tab

**Max Per Check** — Defines the maximum allowable number of the defined promotions permitted on each guest check. Attempts to apply more promotions than the number specified in ‘Max Per Check’ result in a warning message on the order entry terminal. You must set this option to at least one.

Token Distribution Tab

Use the Token Distribution tab to allow the specific promotion to override the calculation distribution of tokens when interfacing with a token distribution device. Select the Token Distribution tab from the Promotions function.

Refer to the Token Distribution Feature Focus Guide for more information on interfacing with a token distribution.
Override Token Calculation — Overrides token distribution calculation by a set quantity.

Override Quantity — Specifies the number of tokens to dispense when you apply the promotion.

Item Level Override — Enables you to distribute tokens by the number of guests in the promotion; otherwise, all tokens are dispensed as one batch.

Pause Based on Group Size — Enables the dispenser to pause between guests so the next guest has time to place their cup under the opening.
Promotion Types

The Promotions tab defines the nature of each promotion. The promotion itself is defined in a secondary dialog box that appears when you click Type Specifics. Each secondary dialog box is specific for each of the different types of promotions built into the Aloha system.

When setting up a promotion, do not include revenue items for discounting. When you attempt to apply a promotion to a revenue item, the FOH error message, ‘Comps and Promos cannot be applied to a Revenue Item,’ appears.

- **BOGO** — (Buy One Get One Free) The customer buys an eligible item and receives another item at a discount or free of charge.
- **Check Reduction** — Permits a simple check reduction with either percentage or dollar amount discounts.
- **Combo** — Combines menu items and assigns a special price.
- **Coupon** — Assigns coupon characteristics to a promotion and defines a coupon.
- **New Price** — Assigns a special promotional price to a menu item without affecting prices elsewhere in the Aloha menu system.
- **Package Promo** — Calculates the total amount of the guest check by applying the base price per guest by the total number of guests in the party, rather than discount the total amount the guest has to pay on a guest check. They also determine the items to add to the guest check, and how many of each, based on the guest count.
- **Quick Combo** — Enables a combination of items to be grouped together for a special price.
Buy One Get One (BOGO) Type

Use the BOGO promotion type to configure a buy one get one of equal or lesser value, either free or at a discounted price. Chargeable modifiers are included in the calculated cost when determining the lower priced item. For example, buy two large sandwiches at regular price, and receive a small sandwich at the discounted price of $0.99. Cheese and bacon are the only charged modifiers allowed in the discounted price. Select Maintenance > Payments > Promotions > Promotions tab, then ‘BOGO’ from the ‘Type’ drop-down list and click Type Specifics to display the Promotions - Buy One Get One dialog box.

**Figure 5-14** Promotions - Buy One Get One Dialog Box

**Required #** — Specifies the required number of items you must purchase from the category specified in ‘of BOGO Items’ before you apply the promotion.

**of BOGO Items** — Specifies the category of items from which you must purchase for the promotion.

**Allow Discount Items** — Specifies the category of items from which you allow to be discounted. The system applies the discount when you select the item in the FOH.

**BOGO Modifiers** — Specifies the category of charged items from which you do not want to charge. The system applies the discount when you select the charged modifier in the FOH.
BOGO Pricing Method Group Box

Use the BOGO Pricing Method group box to determine the discount method for the BOGO promotion.

**Free** — Indicates the second item is sold at no price.

$ — Indicates the second item is sold at a discounted fixed price.

% — Indicates the second item is sold at a discounted fixed percentage of its original price.

**Auto Apply** — Applies the BOGO to all eligible items on the check and suppress the FOH Select Items prompt from displaying. *Related Options: 1)* This option disables the ‘Max Per Check’ and ‘Max Per Table’ options in Maintenance > Payments > Promotions > Restrictions tab. *2)* This option overrides the ‘Manager Needed’ option in Maintenance > Payments > Promotions > Promotion tab.

Check Reduction Type

Use the Check Reduction promotion to discount the guest check either by a percentage or a dollar amount. You can place restrictions on the promotion, such as a minimum amount for the guest check. For example, the guest check total must be at least $50.00 for the customer to receive a 10% discount. You can also restrict the discount to items from a particular category, or it can apply to all items on the guest check. Select Maintenance > Payments > Promotions > Promotions tab, then ‘Check Reduction’ from the ‘Type’ drop-down list and click Type Specifics to display the Promotions - Check Reduction dialog box.

![Promotions - Check Reduction Dialog Box](image)

*Figure 5-15  Promotions - Check Reduction Dialog Box*
**Check Minimum** — Specifies the minimum amount for the guest check before you can apply the Check Reduction promotion. *Related Option:* If you select ‘Qualify,’ and a ‘Qualifying Items’ category, the ‘Check Minimum’ amount pertains to the total value of the items ordered from that category. This total must be greater than the amount specified in ‘Check Minimum’ before you can apply the promotion to items purchased from the category specified in ‘Items.’

**Items** — Specifies the category containing the items that are discounted when you apply the promotion.

**Auto Apply** — Applies the check reduction to all eligible items on the check and suppresses the display of the FOH Select Items prompt. *Related Option:* 1) This option disables the ‘Max Per Check’ and ‘Max Per Table’ options in Maintenance > Payments > Promotions > Restrictions tab. 2) This option overrides the ‘Manager Needed’ option in Maintenance > Payments > Promotions > Promotion tab.

**Qualify** — Works in conjunction with the ‘Qualifying Items’ category and the ‘Check Minimum’ text box to place a restriction on the promotion. *Related Option:* You can apply the promotion if the item total is less than the amount specified in ‘Check Minimum.’

**Qualifying Items** — Works in conjunction with the ‘Qualify’ option and specifies the category to include or exclude when determining if the promotion is still valid.

Use the following table to achieve the desired results:

<table>
<thead>
<tr>
<th>Qualify</th>
<th>Qualifying Items</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected</td>
<td>Selected Category</td>
<td>Compares the amount specified in ‘Check Minimum’ to the total amount of all ordered items in the ‘Qualifying Items’ category to determine if you can apply the promotion.</td>
</tr>
<tr>
<td>Cleared</td>
<td>Selected Category</td>
<td>Compares the amount specified in ‘Check Minimum’ to the total amount of all ordered items not in the ‘Qualifying Items’ category to determine if you can apply the promotion</td>
</tr>
</tbody>
</table>

**Reduce by Group Box**

Use the Reduce by group box to determines whether the promotion applies a percentage amount or a fixed amount.
**Percentage** — Reduces the check by a percentage. Enter the percentage in the ‘Amount’ text box.

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💡 Do not select ‘Percentage’ if the guest check should be reduced by a fixed dollar amount.

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**Amount** — Treats the value as a percentage for percentage coupons, and as a dollar amount for fixed value coupons. Percentages are entered as decimals, such as 0.50 for 50%. 100% (free) is entered as 1.00.

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**Combo Type**

Use the Combo promotion type to combine items from up to 10 categories and assign a special reduced price to them. For example, if the individual price for the sandwich category is $2.99, the sides category $1.99, and the drink category is $1.29, the order total would be $6.27. A combo could be created that allows the customer to order an item from each of these categories for a special reduced price of $5.00. Upon closing the check, the server selects the Combo button, and the system automatically verifies the presence of qualifying menu items on the guest check and applies the combo price.

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👩‍🏫 The price of the combo promotion must be less than the total price of the combined items for the combo to be applied.
Select Maintenance > Payments > Promotions > Promotions tab, then ‘Combo’ from the ‘Type’ drop-down list and click Type Specifics to display the Promotions - Combo dialog box.

**Figure 5-16 Promotions - Combo Dialog Box**

**Combo Check Name** — Holds the name of the combo to display on the guest check.

**Price** — Sets the reduced special price of the combo.

**Free Modifiers** — Specifies the category from which chargeable modifiers are free when you apply the combo.

**Category** — Specifies up to 10 categories you can include in the combo promotion. **Related Requirement:** To define a category, select Maintenance > Menu > Categories.

**Min** — Determines the minimum number of items you can order from the selected category.

**Max** — Determines the maximum number of items you can order from the selected category. There is no additional charge for the items over the minimum limit.
Coupon Type

Use the Coupon promotion type to apply a percentage or fixed dollar coupon discount to items from a specific category. You can set restrictions, such as two items must be purchased from a specific category to receive a discount, or you can apply the coupon to only one qualifying item per guest check. Select Maintenance > Payments > Promotions > Promotion tab, then ‘Coupon’ from the ‘Type’ drop-down list and click Type Specifics to display the Promotions - Coupon dialog box.

**Type of Discount Group Box**

Use the Type of Discount group box to determine whether the discount is a percentage or a dollar amount.

**Percentage** — Specifies the coupon discount is a percentage.

**Dollar Amount** — Specifies the coupon discount is a fixed dollar amount.

**Amount** — Treats the value as a percentage for percentage coupons, and as a dollar amount for dollar amount coupons. Percentages are entered as decimals, such as 0.50 for 50%. 100% (free) is entered as 1.00. Specify the percentage or fixed dollar amount in the text box. A dollar amount entered here establishes a maximum amount, to prevent the discount from exceeding a certain
amount. For example, if a customer purchases two entrees, they may receive a dessert free. However, if the amount specified is $3.00, the customer must pay the difference if the price of the dessert is more than $3.00.

If you are creating a coupon promotion type to use with the Delivery/Frequent Buyer product, enter a value of zero for either the ‘Percentage’ and ‘Dollar Amount’ options. The Aloha system obtains this value from the Delivery/Frequent Buyer product. Refer to the Aloha Delivery/Frequent Buyer Implementation Guide for more information.

**Items Available** — Select a category of eligible menu items for the discount. **Related Requirement:** To define a category, select Maintenance > Menu > Categories.

**COUPON Modifiers** — Specifies a category from which chargeable modifiers are free when you apply the coupon.

**Req’d Items** — Specifies the category in which a purchase must be made in order to qualify for the discount. **Related Option:** The quantity you must purchase is determined by the value entered in ‘Minimum Items Req’d.’

**Minimum Items** — Used to set up promotions that require the purchase of an item from a particular category to receive a discount on an item from either another category or the same category. This text box specifies the number of items you must purchase from the ‘Req’d Items’ category.

**Item Limit** — Determines the maximum number of eligible items that can be selected at any one time from the FOH selection screen when applying the promotion. If more items are selected than the number specified here, an error message appears.

For example, the promotion states buy any entree for 10% off. If the guest check has three entrees for $10.00 each, the discount is calculated based on 10% of $30.00 and a $3.00 discount is applied to the check.

If the promotion states buy one entree and get $2.00 off, and the guest check has three entrees for $10.00 each, the discount is applied to each entree individually, creating three entries on the guest check for $2.00 each; however, if ‘Max Per Check’ is set to 2, the discount can be applied to 2 entrees only for a maximum discount of $4.00.

**Application Group Box**

Use the Application group box to determine how the system effects qualified items for selection.
**User selects each qualified item** — Requires the person entering the customer order to select the items that qualify for the promotion.

**System selects all qualified items** — Causes the system to select items from the order that qualify for the promotion. **Related Option:** This option enables the ‘Automatically include new items’ option.

**Automatically include new items** — Enables the system to automatically recalculate a coupon discount when you add new eligible items to the check. You must apply the coupon again to enable the system to include the new item. **Required Option:** You must select ‘System selects all qualified items’ to enable this option.

**System selects first qualified item** — Enables the system to automatically apply a discount to the first qualifying item for a coupon and bypasses the ‘Is this correct’ confirmation screen. If you apply another coupon to the same check, and there is another qualifying item, the system applies the discount to the next eligible item.

**Distribution Group Box**

Use the Distribution group box to determine whether the system distributes the discount amount to each item or across all items.

**Distribute discount across items** — Distributes the discount across each item that qualifies for the discount. The system prompts you to select qualifying items. Only items specified in ‘Req’d Items’ display for selection. Two items that qualify for a $1.00 discount would each be discounted by 50¢. **Required Option:** You must select Dollar Amount’ to enable this option.

**Apply discount to each item** — Applies the discount to each item that qualifies for the discount. The system prompts you to select qualifying items. Only items specified in ‘Req’d Items’ display for selection. Two items that qualify for a $1.00 discount would each be discounted $1.00. **Required Option:** You must select Dollar Amount’ to enable this option.

**Audit Group Box**

Use the Audit group box to include this coupon in coupon reconciliation and the number this coupon can differ when verifying totals.

Refer to the Coupon Audit Count Feature Focus Guide for more information on reconciling coupons.
Audit count at Checkout — Requires a count of the total number of this type of coupon received, upon checkout.

Variance quantity allowed — Determines the number this coupon can differ when verifying totals for audit. The variance amount applies to over and under the total entered for audit.

**New Price Type**

Use the New Price promotion to assign a special promotional price to menu items without affecting prices elsewhere in the system. For example, an entree that normally sells for $12.50 can be purchased for $9.50 with the New Price promotion. This type of promotion is different in that it sets the price for the item as opposed to calculating a new price based on a percentage or dollar amount discount. It is also different in that the item(s) eligible for discount are specified instead of allowing the discount to be applied to any item in a particular category.

You can place restrictions on the promotion. For example, the customer may have to purchase two entrees to receive a dessert that normally sells for $5.50 at a discounted price of $4.00. Select Maintenance > Payments > Promotions > Promotion tab, then ‘New Price’ from the ‘Type’ drop-down list and click Type Specifics to display the Promotions - New Price dialog box.

![Promotions - New Price Dialog Box](image)

*Figure 5-18 Promotions - New Price Dialog Box*
**Minimum Required** — Used in conjunction with the ‘Required Items’ option to define the promotion to require the purchase of an item from a particular category and receive a discounted price on the item(s) specified in ‘Item.’ **Required Option:** This option specifies the number of items you must purchase from the ‘Required Items’ category.

**Maximum Allowed** — Sets the number of promo types you can apply to the same guest check. For example, if you type one, you can only apply one instance of the New Price promotion and no other promotion type.

**Required Items** — Specifies the category in which a purchase must be made in order to qualify for the item discount. **Required Option:** The quantity you must purchase is determined by the value entered in ‘Minimum Required.’ **Related Requirement:** To define a category, select Maintenance > Menu > Categories.

**Free Modifiers** — Specifies a category from which chargeable modifiers are free when you apply the New Price Promotion. **Related Requirement:** To define a category, select Maintenance > Menu > Categories.

**Item** — Specifies up to 10 individual menu items to use for each New Price promotion. **Related Requirements:** To define an item, select Maintenance > Menu > Items.

**New Price** — Enter the price to use for the item when you apply the promotion to a guest check.

**Auto Apply** — Applies the New Price promotion to all eligible items on the check and suppresses the FOH Select Items prompt from displaying. **Related Options:** 1) This option disables the ‘Max Per Check’ and ‘Max Per Table’ options in Maintenance > Payments > Promotions > Restrictions tab. 2) This option overrides the ‘Manager Needed’ option in Maintenance > Payments > Promotions > Promotion tab.

**Package Promo Type**

Use Package promotions to calculate the total amount of the guest check by applying the base price per guest by the total number of guests in the party, rather than discount the total amount the guest has to pay on a guest check. You can also determine the items to add to the guest check, and how many of each, based on the guest count.

Refer to the Package Promotions Feature Focus Guide for more information on configuring and using package promotions.
Select Maintenance > Payments > Promotions, then ‘Package Promo’ from the ‘Type’ drop-down list and click Type Specifics to display the Promotions - Package Promo dialog box.

**Base Price** — Specifies the base price of the promotion. For a discount, the base price $X$ guest is less than the total price of all components combined. For a gain, the base price $X$ guest is more than the total price of all components combined.

**Group Size Range** — Specifies the minimum number of guests needed and the maximum number of guests allowed, to use the promotion. Type up to 999 guests.

**# of Components** — Specifies the number of components to use for the promotion. This number should be equal to the number of items included in the promotion. Type from one to 10. For example, if this promotion includes pizza, a drink, a dessert, and tokens, select four from the drop-down list. The ‘Component’ and ‘Free Modifiers?’ drop-down lists become enabled according to the number of components you select.

**Components** — Specifies the item to include in the promotion. Select up to 10 items. *Related Requirement:* To define an item, select Maintenance > Menu > Items.
**Free Modifiers?** — Specifies a modifier group of modifiers for the corresponding item in which the modifiers are not charged when you select them in the FOH. This list displays the modifier groups attached to the corresponding item. ‘None’ indicates there are no modifier groups attached to the item.

**Discount Group Box**

Use the Discount group box to determine whether you want to exclude the item from the discount and the order in which you want the component to absorb the promotional discount.

**Exclude** — Indicates you want to exclude the item from the discount or gain calculation. To clear an excluded item, select the item again. *Related Option:* When selected, this option disables the ‘Apply Order’ option.

**Apply Order** — Indicates the sequential order number in which you want the component to absorb the full possible amount of the promotional discount. After applying the amount, if there is a remaining discount, the next sequential order number absorbs the fullest possible amount. If you set the promotion to show a gain and any component has an ‘Apply Order’ value greater than zero, the full value of the gain is allocated to the lowest numbered component. *Required Option:* You must clear ‘Exclude’ to enable this option.
Quick Combo Type

Use the Quick Combo promotion type to require a combination of items to be grouped together for a special price. Up to ten items can be combined. For instance, a burger, an order of fries, and a drink may be combined and assigned a discounted price. Select Maintenance > Payments > Promotions > Promotion tab, then ‘Quick Combo’ from the ‘Type’ drop-down list and click Type Specifics to display the Promotions - Quick Combo dialog box.

Regular Name — Holds a descriptive name for the promotion.

Regular Price — Specifies the base price of the quick combo without an upsell charge. The system validates if the price is lower than the total of each item included in the quick combo if it were priced separately.

Show Upsell as Modifier — Displays the quick combo on the check as modifier.

Figure 5-20 Promotions - Quick Combo Dialog Box
Auto Apply if Possible? — Automatically applies the promotion to all eligible items on the check and suppresses the FOH Select Items screen. **Related Options:** 1) This option disables the ‘Max Per Check’ and ‘Max Per Table’ options in Maintenance > Payments > Promotions > Restrictions tab. 2) This option overrides the ‘Manager Needed’ option in Maintenance > Payments > Promotions > Promotion tab.

Group Delete? — Deletes the individual items from the check and only shows the order as a combo.

Only Print Combo Name on Guest check? — Causes the system to print the name of the combo on the guest check without summarizing the items contained in the combo.

Consolidate Like Components? — Causes the system to list multiple instances of items together on the guest check.

# Required Components (2 - 10) — Enter a number between 2 and 10 for the required number of components that you must purchase for the Quick Combo to take effect.

Update — Select the component and enter its requirements in the Component group box. For example, select Component #1 and then enter the name of the component such as ‘hamburger,’ ‘fry,’ or ‘drink.’ The number you enter in ‘Num Required Components (2-5)’ determines the number of available choices.

Name — Defines the name of the component, such as Sandwich, Side, or Drink.

Exclude — Excludes the component from discounting calculations. This applies the total discount to only the components not marked with ‘Exclude’ in the promotion. If the price of the discounted amount is greater than the full price of the components not marked with ‘Exclude,’ then you can not apply the promotion.

Primary — Specifies the component is a required entry on the order before you can apply the quick combo using the Quick Combo Toggle button function. You can designate only one component as the primary. **Required Option:** You must access Panel Editor and add the Quick Combo Toggle button function to a panel, to toggle between the primary component and its respective quick combo promotion.

Regular Item — Defines up to 15 items to include in the quick combo. For example, if the combo normally comes with a regular order of fries, then select ‘Reg Fries’ from a drop-down list.
Upsell drop-down list — Specifies the upsell level for the quick combo. You can choose between Upsell 1 or Upsell 2. With each selection, the drop-down lists populate with items for the corresponding upsell choice. For example, if you can upsize the combo to a large order of fries for Upsell 1, then select ‘Large Fries’ from the drop-down list. If you can upsize the combo to a higher level for Upsell 2, such as ‘Mega Fries,’ then select ‘Mega Fries’ from the drop-down list.

It is important to note the screen dynamically changes according to the selection you make in the ‘Upsell’ drop-down list. For example, if you choose Upsell 2, the names on the ‘Surcharge,’ ‘Upsell Name,’ and ‘Upsell Price’ options reflect the #2, and all selections for these options pertain to the second upsell level, including the selections in the Upsell Items options.

Upsell Items — Defines up to 15 upsell items to include in the quick combo. For example, if you can upsize the combo to a large order of fries, then select ‘Large Fries’ from a drop-down list.

Surcharge — Specifies the additional amount to charge for the upsell items, if applicable. For example, a hamburger combo meal comes with a drink and fries. The upsell items increase the drink and fries to a large drink and fries, and an additional 0.30 is added to the check for the large drink and fries.

Upsell Name \( n \) — Specifies the description for the upsell level, such as ‘Biggie Size.’ The Upsell number corresponds to the number selected in the ‘Upsell’ drop-down list.

Upsell Price \( n \) — Specifies the additional price for the upsell level, on top of the previous level. The Upsell number corresponds to the number selected in the ‘Upsell’ drop-down list.

Enable QC Item Substitution — Enables item substitution for the selected component. The system places the eligible items for the component, including upsell items, on a FOH system-generated item substitution panel. Related Option: This option enables the ‘Substitution Category’ drop-down list.

Substitution Category — Specifies a category of items to use for item substitution for the selected component. The system places the items on a FOH system-generated item substitution panel. The items in the category must be defined as an eligible component of the quick combo or the system ‘breaks’ the quick combo into a la carte items. Enable this option in situations where a site must configure multiple quick combo promotions to report as one, to accommodate for more than 45 items per component. You can also use this method to substitute the primary component item, such as ‘burgers’ to change the quick combo to a different quick combo. Required Option: You must select ‘Enable QC Item Substitution’ to enable this option.
Comps

Use the Comps function to define and configure a wide array of comps for use in the Aloha system. You create comps using the dialog boxes in conjunction with the categories defined in Maintenance > Menu > Categories. Comps are placed on the FOH using the Panel Editor feature accessed in Maintenance > Menu > Panel Editor.

Categories are an important part of comps. A full understanding of categories is important in order to get the most from the Comps feature. Comps are often defined in terms of a category, and depending on the needs of the restaurant, it may be necessary to create special non-sales/non-retail categories just for use in comps.

When setting up a comp, do not include revenue items for discounting. When you attempt to apply a comp to a revenue item, the FOH error message, ‘Comps and Promos cannot be applied to a Revenue Item,’ displays.

Select Maintenance > Payments > Comps to display the Comps function. The Comps function provides the following tabs: Comps, Taxes, Restrictions, and BackOffice. Select Maintenance > Payments > Comps to display the Comps function.

Number — Holds a three-digit number that together with ‘Name’ identifies each comp. To create a new comp, enter an unused number and press Enter. To edit an existing record, scroll through the Number drop-down list, select the comp to edit and press Enter.
Comps Tab

Use the Comps tab to define the name, button position, and the items eligible for comps. Select the Comps tab from the Comp function.

**Figure 5-21** Comps - Comps Tab

**Name** — Holds a descriptive name to identify the comp.

**Check** — Holds a descriptive name that prints on the guest check when the comp is used.

**Percent Off** — Sets the percentage to discount when you apply the comp. Type the percentage and press Enter. For example, to set this to 50%, type 50 and press Enter. The system converts the decimals for you (50.0000). If the comp is a dollar amount, set this to zero.
**Maximum $** — Establishes a maximum dollar amount you can discount. *Related Option:* If you clear ‘Must Enter Amount,’ you must select the item(s) to comp when you apply the comp. Neither the item total or the entered amount can be more than the amount specified here. For example, if you define the comp as 100% but ‘Maximum $’ is set to $5.00, the customer is responsible for the balance if the item total is more than $5.00.

---

Dollar amount comps cannot be set as a fixed amount. Select ‘Must Enter Amount’ and the FOH prompts for the amount when you apply the comp.

---

**Eligible Items** — Specifies the category of items from which you must order to apply the comp. This can be any of the standard categories, such as Sales or Retail, or any Non-Sales/Non-Retail Category created specifically for comp purposes. If you need to add or modify a category, click Eligible Items to access the Categories function. When you modify a category, the change applies to all items assigned to that category. *Related Requirement:* To define a category, select Maintenance > Menu > Categories.

---

**Report As** — Defines the comp in which you want to report sales applied with this comp.

---

To report a comp as itself, save it, then access the comp and select it from the ‘Report As’ drop-down list.

---

**Active** — Makes the comp active. *Related Requirement:* You can activate comps using events in Maintenance > System > Events.

---

**Print Check** — Prints a copy of the guest check immediately after using this comp, for the guest to view.

---

**Open Drawer** — Enables the cash drawer to open when you apply the comp.

---

**Manager Needed** — Requires a manager to apply the comp.

---

**Apply Gratuity** — Enables the system to apply a gratuity to the guest check, after adding the selected comp to the check.
eFrequency Real Time — Defines the comp as a real-time comp to use with the eFrequency rewards program, and disables most of the options available on the Comp function tab.

Refer to the eFrequency User Guide for more information on configuring comps for use with eFrequency.

Must Select Items — Requires you to select menu items to apply the comp on the FOH.

Must Enter Unit — Prompts you to enter the unit number on the FOH. This is useful for multi-store operations which accept employee comps from other locations. **Related Option:** To define the store’s unit number, type the number in ‘Unit’ in Maintenance > Store Settings > System group > Store Information tab.

Must Enter Name — Prompts you to enter a name for the comp on the FOH. This is often used to track who is receiving employee comps.

Use Mag Card Only — Requires an employee receiving a comp to use his or her mag card instead of entering the number manually. **Required Option:** You must select ‘Must Enter Name’ to enable this option.

Must Enter Amount — Prompts for the comp amount at the order entry terminal. Used for non-percentage comps. **Related Options:** 1) You cannot select ‘Must Enter Amount’ in conjunction with ‘Must Enter Percent.’ 2) The system does not allow you to save a comp unless you enter a rate, or if you select ‘Must Enter Amount’ or ‘Must Enter Percent.’

Must Enter Percent — Prompts for the entry of the percentage to decrease the check, rather than using a fixed percent. **Related Options:** 1) You cannot select ‘Must Enter Amount’ in conjunction with ‘Must Enter Percent.’ 2) The system does not allow you to save a comp unless you enter a rate, or if you select ‘Must Enter Amount’ or ‘Must Enter Percent.’

**Cost Based Discount Group Box**

Use the Cost Based Discount group box to enable the comp to decrease the check based on a specified mark-up percentage of the inventory cost of the item.

**Cost Based Discount** — Enables the comp to decrease the check based on a specified mark-up percentage of the inventory cost of the item. This setting enables the ‘Markup Percent’ option and disables the ‘Percent Off’ and ‘Must Enter Amount’ options in the same tab.
**Markup Percent** — Multiplies the inventory cost of the item by the markup percentage and adds the value to the cost, to calculate the reduced price of the item. For example, the inventory cost of an item is $1.00 while the retail price is $5.00, and the mark-up percentage is 10%, then $0.10 (mark-up) is added to $1.00 (inventory cost) to equal $1.10 (employee cost). The employee receives a $3.90 decrease from $5.00 (retail price). If you do not supply a cost for the item in Item Maintenance, the system cannot decrease the check using this method.

**Validation Group Box**

Use the Validation group box to check the validation code of the comp and whether you can enter numeric entries only.

**Enter Validation Code** — Requires you to enter the validation code of the comp.

**Numeric Only** — Requires you to enter only numeric values for the validation code.

**Length** — Specifies the length of text you can enter for the validation code.

**Taxes Tab**

Use the Taxes tab to define any type of tax applied to the promotion. Select the Taxes tab from the Promotion function.

![Figure 5-22 Comps - Taxes Tab](image-url)
**Guest Pays Tax** — Requires the guest to pay the tax on the comp. If cleared, the restaurant pays the tax.

**Surcharge Comp Amount** — Applies a surcharge to the comp amount. Select this option only if using surcharges. *Related Requirement:* To define a surcharge, select Maintenance > Menu > Surcharges.

**Primary Taxes Group Box**

Use the Primary Taxes group box to assign a primary tax to the comp and other tax requirements.

**Tax Comp Amount** — Applies the primary tax to the full amount of the comp. The system calculates the tax on the original item price before applying the comp.

**Tax Food Cost** — Uses the percentage defined in the ‘Food Cost’ text box to apply a tax amount on the food cost in the comp. *Required Option:* You must define a tax percentage in ‘Food Cost.’

**Food Cost %** — Defines a tax percentage (entered as a decimal), to use to calculate an approximate food cost. *Required Option:* You must select ‘Tax Food Cost’ to enable this option.

**Tax ID** — Assigns the selected tax to apply to the comp. Some jurisdictions require the restaurant to pay the tax on all comps. Thus, one way to track promotion tax amounts is to create a special tax method called Promotions/Comps. If you need to add or modify a tax, click Tax to access the Taxes function. When you modify a tax, the change applies to all areas assigned to that tax. *Related Requirement:* To define a tax, select Maintenance > Menu > Taxes.

**Secondary Taxes Group Box**

Use the Secondary Taxes group box to apply a secondary tax to the comp amount.

**Tax Comp Amount** — Applies a secondary tax to the comp amount. The system calculates the tax on the original item price before applying the comp.

**Vendor Tax Group Box**

Use the Vendor Tax group box to apply a vendor tax to the comp.

**Tax Comp Amount** — Applies the vendor tax to the full amount of the comp.
Tax Food Cost — Uses the percentage defined in the ‘Food Cost’ text box to apply a vendor tax amount on the food cost in the comp. **Required Option:** You must define a tax percentage in ‘Food Cost.’

Food Cost % — Defines a tax percentage (entered as a decimal), to use to calculate an approximate food cost. **Required Option:** You must select ‘VTax Food Cost’ to enable this option.

**Restrictions Tab**

Use the Restrictions tab to define the limitations on the comp, govern how promotional items are handled with the comp, and how other comps affect it. Select the Restrictions tab from the Promotions function.

![Figure 5-23 Comps - Restrictions Tab](image)

**Promo Restrictions Group Box**

Use the Promo Restrictions group box to set restrictions on promotional items applied with the selected comp.

Promo Items Eligible — Eligible items defined as promotions are eligible for inclusion in the comp being defined.
**Allow Prior For Check** — Allows multiple promotions on the same guest check.

**Allow Subseq For Check** — Allows subsequent promotions on the check to be eligible for the defined comp.

**Comp Restrictions Group Box**

Use the Comp Restrictions group box to set restrictions on comp items applied with the selected comp.

**Comp Items Eligible** — Allows already defined comp items to be eligible for the defined comp. Clear this option if comp items are not permitted.

**Allow Prior For Check** — Allows multiple comps on the same guest check.

**Allow Subseq For Check** — Allows subsequent comps on the check.

**Other Options on the Restrictions Tab**

**Max Per Check** — Defines the maximum allowable number of the defined comps permitted on each guest check. Attempts to apply more comps than the number specified in ‘Max Per Check’ result in a warning message on the order entry terminal. You must type at least one in this option.

**Verify Type** — Enables you to assign a number between 1 and 3 to validate an employee comp. This field requires a file titled CompVer.txt in Alohaqs\Data with the following requirements in the text document:

- Employee Number in positions 1-10
- Employee First Name in positions 11-25
- Employee Last Name in positions 26-41
- Comp Type in position 42

The system validates the employee number against CompVer.txt. You must select ‘Must Enter Name’ in Maintenance > Payments > Comps > Comps tab. When you select the comp on the FOH screen the system requests a name and validates it with the CompVer.txt file. This feature enables you to assign employees three levels of comps. For example, an employee with 1 year of employment can be given a 50% discount; whereas an employee with 1 month of employment can be given a 10% discount.
**Back Office Tab**

Use the BackOffice tab to allow PMS authorization for the selected comp and if the comp allows offline posting. Select the Back Office tab from the Comps function.

![Figure 5-24 Comps - Back Office Tab](image)

**PMS Authorize** — Requires you to enter PMS information, and upon a response, sends the transaction to the PMS. **Required Option:** You must select ‘Use Property Management System (PMS) in Maintenance > Store Settings > Hotel group to enable this setting.

**Allow PMS Offline Posting** — Enables offline posting for the comp when the Aloha POS system cannot connect to the PMS. **Required Option:** You must select ‘Use Property Management System (PMS) in Maintenance > Store Settings > Hotel group to enable this setting.

Refer to the Interfacing PMS with Aloha User Guide for more information regarding interfacing with a property management system.
House Accounts

Use the House Accounts function to define house accounts and treat them as accounts receivable within the system, when coupled with a correctly defined house account tender type in Maintenance > Payments > Tenders.

When you tender a house account payment on the FOH, the system asks for the account. The account number you enter must match either the account number or account name of a valid house account or the payment is rejected.

Select Maintenance > Payments > House Accounts to display the House Account function.

Account # — Holds a eight-digit number that together with ‘Name’ uniquely identifies each house account. To create a new record, enter an unused account ID and press Enter. To edit an existing record, scroll through the Account # drop-down list and select the record to edit.

Account Name — Holds a name to uniquely identify the account number.

Inactive — Deactivates the account.
Name and Address Group Boxes

Use the Name and Address group boxes for entering standard name and address information, with an additional text box for a telephone number. Unlike most other database files within the Aloha system, the House Account file does not depend on other files within the system, thus there are no drop-down selection lists in the dialog box.

Telephone — Holds the telephone number of the account holder.
Coins

Use the Coins function to define specific coins and currencies to use for the reconciliation features. The reconciliation coin screen contains all U.S. coin currencies, from the penny to the silver dollar, as a default. You can customize the screen for International coin currencies of your choice to accommodate the coins you accept at your establishment. For example, if you are located on the northern U.S. border, and accept the Canadian dollar, you should add the Canadian dollar as a coin currency.

All countries have a currency value equivalent to the value of 1, such as the American dollar, Japanese yen, Mexican peso, German deutschmark, or Canadian dollar. For the respective country, they have a coin currency subdivision to equal the value of 1. For example, the United Kingdom uses the British pound as the value of 1, and has coin subdivisions to equal a pound, such as 100 pence (100/1=100), 20 shillings (100/20=5), 4 crowns (100/4=25), and others. The coin value of these would be ‘0.01,’ ‘0.05,’ and ‘0.25,’ respectively.

Refer to the Drawer Reconciliation and Employee Reconciliation Feature Focus Guides for more information on configuring and using defined coins.

Select Maintenance > Payments > Coins to display the Coins function.
**Coin** — Specifies the ID number of a coin and determines the order in which the coins appear on the Coin Counts screen. We recommend defining all active coins in order of their coin value, highest to lowest.

**Description** — Denotes the name of the coin, such as Peso, Yen, or Pound. You can type up to 15 alpha-numeric characters.

**Active** — Specifies the coin is active in the system and displays on the Coin Counts screen.

The default American coin values appear first in the Coin Counts screen when you enter your coin counts. If you do not accept American currency, we recommend clearing ‘Active’ on these coins so they do not appear and the coins you do accept appear on the first page of the Coin Counts screen.

**Value** — Specifies the value of the coin in relation to the whole value of 1 for the currency. For example, for the American dollar market, the value of a dime is $0.10. **Related Option:** To define the number of digits allowed to the right of the decimal, type the number in ‘Number of Digits’ in Maintenance > Store Settings > International group > Special Currency tab.

**Roll Value** — Indicates the value of the coin when it is rolled for distribution. This amount must be evenly divisible by the value. For example, the value for a roll of quarters cannot be $10.01 because a $10.01 is not evenly divisible by $0.25. When you click Save, the system calculates the number of coins that equals one roll and displays this value to the right.

**Foreign Currency** — Defines the type of foreign currency to specify the symbol and conversion rate. If you need to add or modify a foreign currency, click **Foreign Currency ID** to access the Foreign Currency function. When you modify a foreign currency, the change applies to all payments assigned to that foreign currency.
Foreign Currencies

Use the Foreign Currencies function to set up foreign currencies as a method of payment at a restaurant location. Using this feature, when the FOH presses the corresponding tender button for the foreign currency, the exchange rate is converted and displayed on screen. Using the numeric keypad, the server enters the amount received from the customer and presses OK. The amount is converted to the local currency equivalent. The name of the foreign currency, its exchange rate, the amount tendered, and the corresponding amount in local currency displays on the guest check. If the amount entered does not equal the amount of the check, the change amount or balance due amount also displays (in local currency).

Foreign payment displays on guest checks, pole displays, and other peripheral devices that display foreign payment, as follows:

<table>
<thead>
<tr>
<th>Name</th>
<th>Exchange Rate</th>
<th>Foreign Amount</th>
<th>Local Equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pound</td>
<td>1.65</td>
<td>£ 8.00</td>
<td>$13.20</td>
</tr>
</tbody>
</table>

Select Maintenance > Payments > Foreign Currencies to access the Foreign Currencies function.

Figure 5-27  Foreign Currencies Function Tab
**Currency ID** — Holds a five-digit number that together with ‘Name’ uniquely identifies each foreign currency record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ‘Currency ID’ drop-down list, select the record to edit and press Enter.

**Name** — Holds a descriptive name for the foreign currency.

**Symbol** — Represents the symbol that displays on the FOH when the corresponding tender is selected. Sometimes it is necessary to cut and paste the symbol from another application such as the Character Map located in Windows.

**Decimal Places** — Designates the number of digits to the right of the decimal point. Although two is the standard for North America, many nations require three digits to the right of the decimal.

**Decimal Separator** — Separates whole values from fractional values. If custom dictates that the separator is a comma, enter a comma in this field.

**Thousands Separator** — Accepts the customary character that is used to separate numbers in thousands. North American custom is to use a comma as the thousands separator, however, European custom is to use a period.

**Display In Balance Due Section** — Forces the foreign currency to always be displayed along with the local currency on the FOH Balance Due screen.

**Display In Change Due Section** — Displays the foreign currency along with the local currency on the FOH Change Due screen. If the ‘Display in Change Due Section’ option is cleared selected for a particular currency, that currency still displays change due when it has a payment on a guest check.

**Positive Format** — Select the format used to display currency in positive numbers. For example, using the format ‘00 $1.1,’ all currency with a value of one or greater displays as a positive number, followed by a decimal (or decimals).

**Negative Format** — Selects the format used to display currency in negative numbers. For example, using the format ‘01- $1.1,’ all currency with a value less than zero displays as a negative number, followed by a decimal (or decimals).
Exchange Rate Group Box

Use the Exchange Rate group box to determine the exchange rate of the foreign currency and allow you to update existing currencies with new information.

**Exchange Rate** — Determines the multiplier used to convert between the local currency and the foreign currency (Exchange Rate) and should be monitored regularly. It is very important to understand the direction of the currency exchange when entering the rate in this box because the inverse of that rate is the exchange in the opposite direction.

To ensure the correct ‘direction,’ ask yourself which currency has a greater value, then use this logic: If the foreign currency has a higher value than the local currency, then the exchange rate must be greater than 1.00. If the foreign currency has a lower value than the local currency, then the exchange rate must be less than 1.00.

**Update Now** — Immediately updates the FOH with information for existing currencies. However, new currencies are not updated in the FOH until exiting the Maintenance program and performing a real time update, or during a System Refresh.

Prefix — Specifies the characters to precede the exchange rate on checks.

Suffix — Specifies the characters to follow the exchange rate on checks.

Payment Display Group Box

Use the Payment Display group box to determine special characters that precede and follow a payment on checks.

Prefix — Specifies the characters to precede a payment on checks.

Suffix — Specifies the characters to follow a payment on checks.
System Maintenance Functions

This chapter discusses the features available in the Aloha system that relate to adding and creating events, order modes, revenue centers, and tables, and defining void reasons, no sale reasons and petty cash accounts.

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Use the features available on the System menu to provide considerable control over the configuration of the restaurant. Many functions relevant to the order process, the organization of the business day, and the grouping of income sources for report purposes are available on the System menu. You can define petty accounts and reasons for voided sales and no-sale activities using commands on the System menu.

Select Maintenance > System to access the System menu.

Use the options in the System menu to:

- Add and configure Events, a powerful tool used to automatically activate menus, reroute printers, activate messages on order entry terminals, activate comps and promos, and many other activities necessary for a restaurant operation.
- Define required fields for data entry for Employee maintenance.
- Define required order modes, such as To Go, Dine In, and more.
- Define order entry queues.
- Define the different revenue centers in the restaurant so that income from the different areas can be summarized.
- Define day parts, which are used to divide the day into time blocks. Day parts help to organize business data for reporting.
- Define concepts for multi-level organizations.
- Establish void reasons that are used to define why an item is voided, and whether or not the void affects inventory.
- Establish no sale reasons that are trapped in an audit report each time a cash drawer is opened without the entry of a sale.
- Create petty cash accounts for tracking petty cash transactions.
- Establish routing levels to route items waiting in queues from one place to another within the restaurant in a controlled manner.
Events

Events permit the automation of many of the event scheduling procedures that are normal for restaurant operations. Configure Events to automatically activate menus, reroute printers and video display systems, activate messages, restrict order modes by job codes, or many other activities.

Select Maintenance > System > Events to access the System Events function.

Events appear in the list in reverse order of their hierarchical relationship to the system. Each item on the list overrides all similar items above it in the list. For example, if two events are on the list that relate to price changes, the system encounters the first one as it reads the list and makes it the active event. The system reads the remainder of the list and finds the second event. If the second event affects the same items, but differs with regard to scheduling from the first event, the system makes the second event active when the scheduled time is due for the second event.

It is also important to note that the system will not permit you to add a pair of events in reverse order with regard to scheduling. For example, you may want to add one event that sets the price of an item at all times, and another event that sets the price differently for just a few hours during the day. If you add the event scheduling the price for just a few hours, and then add the event that
establishes the price as it will be at all times, the two events display on the event list in time order rather than the order in which they were added. This apparent reversal of order is due to the hierarchy established by the scheduled times for the two events.

**Button Functions**

You can add, edit, and delete events using button functions located on the side of the function tab.

<table>
<thead>
<tr>
<th>Button Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Event Button</td>
<td>Click Add to add a new event. It opens the Event Time and Type secondary dialog box. After you select an event type and click OK, a secondary dialog box opens that is specific to the type of event selected (except for EOD). In most cases, the new dialog box prompts for data specific to the event type (see Programmed Event Types). To add the event, click OK. To cancel the addition, click Cancel.</td>
</tr>
<tr>
<td>Edit Time Button</td>
<td>Click Edit Time to change the time of an event. It opens the Event Time and Type secondary dialog box.</td>
</tr>
<tr>
<td>Edit Event Button</td>
<td>Click Edit Event to change the event. It opens a secondary dialog box specific to each type of event in the system.</td>
</tr>
<tr>
<td>Delete Button</td>
<td>Click Delete to delete an event.</td>
</tr>
<tr>
<td>Done Button</td>
<td>Click Done to save all changes and close the Events tab. Select after adding a new event or editing an existing event.</td>
</tr>
</tbody>
</table>

**Add New Events**

Select Add Event in the Events function to open the Event Time & Type dialog box.

![Event Time & Type Dialog Box](image)

*Figure 6-3 Event Time & Type Dialog Box*
**Event Type** — Specifies the type of event. There are approximately 40 event types available in the drop-down list. These are described in detail in the Programmed Event Types section in this chapter.

**Time** — Specifies the start time for the event. Enter the time in hours and minutes using a 36-hour clock. When using a 36-hour clock, the date of business is extended by 12 hours so that events are accounted for during the same date of business. For example, assume the date of business is 01/01/2000. After midnight, the date of business remains 01/01/2000, but the system date becomes 01/02/2000. The date of business remains 01/01/2000 until the End-of-Day procedure runs, which is typically 4:00 a.m. the following day. To ensure the day’s information is posted to the corresponding date of business (01/01/2000), the EOD Event is set to run at 28:00. A time after midnight is specified by adding 24 to the hour, therefore, 28:00 is the equivalent of 4:00 a.m. the following day. When the EOD has completed successfully, the date of business is changed and once again coincides with the system date.

The date of business in the FOH is the operational date in the Aloha system. If the date of business in the FOH and the BOH are not the same, events do not fire correctly.

Before you create an event for a specific time or day of the week, you must create required database structures ahead of time, and configure them to work correctly with the event. For example, you must create an active Price Change record, and make it valid for the period of time referenced by your event, to make the event work successfully.

There are four selections available in this dialog box that are exclusive to each other; only one selection is permitted for a given event. These selections display in reverse order of their hierarchical relationship to the system. Each item on the list overrides all items above it in the list.

**Daily** — Sets the event to happen every day at the specified time.

**Weekly** — Activates the Weekly drop-down list containing the days of the week. Weekly events override daily events.

**Monthly** — Activates the Month text box, which accepts the day of the month in which the event should be activated. Monthly events override weekly and daily events.

**Special** — Enter the date in MM/DD/YYYY format. Special events override all other timed events.
Other daily events can override a previous daily event. For example, on Monday through Saturday, breakfast is fired at 8 A.M., lunch at 11 A.M., and dinner at 4 P.M.

**Daily Events**

1. 8 A.M. Breakfast
2. 11 A.M. Lunch
3. 4 P.M. Dinner

On Sunday, there is a brunch from 8 A.M. to 3:59 P.M. A weekly event needs to be fired to override the weekly events, however, the daily event will still fire on time because of the hierarchy. Select a weekly brunch event for Sunday, and schedule the event for the same time specified as the daily menu change. Schedule another event to override the firing of the regular daily event at 11 A.M.

**Daily Sunday Brunch**

1. 8 A.M. Brunch
2. 11 A.M. Brunch
3. 4 P.M. Dinner

If the second event was not added, the 8:00 A.M. Brunch event would fire, but revert back to the daily 11:00 Lunch event. In the example given, the Brunch event runs up to 3:59 P.M., then the regular Dinner event fires as usual.

When events fire for their scheduled time, they end when the End-of-Day occurs and a new business day starts, thus reverting back to normal operations. If scheduled for daily, the event fires at the same time every day. If a time is not specified for an event, the event is active at all times. If the event activates a feature, another event can be scheduled to disable the feature.

**Programmed Event Types**

Event Types found in the System Event Maintenance tab are defined as part of the Aloha system and are not created by the user. The Event definitions currently provided are:
(5) Reroute Printer

Use the Reroute Printer event to send orders and items designated to print to one printer to print to another printer. Use this event for moving item printing to another printer when a station is closed down. You can change to another routing, such as the previous one, before the EOD occurs. To do this, create another Reroute Printer event with another routing, and specify a later time of the day.

You can also manually reroute printers on demand, using the Reroute Printer button on the FOH System screen. Related Option: To allow an employee to reroute printers, select ‘Reroute Printer’ in Maintenance > Labor > Access Levels > System tab and assign the access level to the employee.

(from and to Printer) — Specifies the printer to reroute from and the target printer. Related Requirement: To define a printer, select Maintenance > Hardware > Printers.

(6) Reroute Printer Group

Use the Reroute Printer Group event to send orders and items designated to print to one printer group to print to another printer group. Use this event for moving item printing to another printer when a station is closed down. You can change to another routing, such as the previous one, before the EOD occurs. To do this, create another Reroute Printer Group event with another routing, and specify a later time of the day.
You can also manually reroute printer groups on demand, using the Reroute Printer Group button on the FOH System screen. **Related Option:** To allow an employee to reroute printers, select ‘Reroute Printer’ in Maintenance > Labor > Access Levels > System tab and assign the access level to the employee.

![Reroute Printer Group](image)

**Figure 6-5  Reroute Printer Group Event**

**From and To Print Group** — Specifies the printer group to reroute from and the target printer group. **Related Requirement:** To define a printer group, select Maintenance > Hardware > Printer Groups.

**(8) End of Day**

The End of Day event schedules the End-of-Day procedure. Use this event to start a new business day at a particular time. The time should be defined during a slow time of operation, such as during the time when the establishment is closed. The event is added to the schedule in the Event Time & Type dialog box.

---

The Aloha system runs on a 36-hour clock. For example, to run End-of-Day at 4 a.m., set the event time to run at 28:00.

---

You can also manually invoke the End of Day, using the End of Day button on the FOH System screen. **Related Option:** To allow an employee to invoke the End-of-Day on demand, select ‘End of Day’ in Maintenance > Labor > Access Levels > System tab and assign the access level to the employee.
(10) Reroute Print by Terminal

Use the Reroute Print by Terminal event to send orders and items designated to one printer group to print to another printer group, determined by the terminal. Use this event when you want to specify your routing by terminal destination. You can change to another routing, such as the previous one, before the EOD occurs. To do this, create another Reroute Print by Terminal event with another routing, and specify a later time of the day.

You can also manually reroute printing on demand, using the Reroute Printer Group button on the FOH System screen. **Related Option:** To allow an employee to reroute printers, select ‘Reroute Printer’ in Maintenance > Labor > Access Levels > System tab and assign the access level to the employee.

![Reroute Print by Terminal](image)

*Figure 6-6 Reroute Print by Terminal*

**Terminal** — Specifies the terminal to receive the routing. **Related Requirement:** To define a terminal, select Maintenance > Hardware > Terminals.

**From and To Print Group** — Select the printer group to reroute from and the target printer group. **Related Requirement:** To define a printer group, select Maintenance > Hardware > Printer Groups.
(11) Set Left Message

Use the Set Left Message event to activate a main screen message to appear on the left side of the login screen of order entry terminals. Use this event to activate special messages, such as holiday greetings, new specials, and override the standard message on the left side. You can change to another message to appear on the left side, such as the previous one, before the EOD occurs. To do this, create another Set Left Message event with another message, and specify a later time of the day.

**ID** — Specifies the main screen message to activate on the left side of the FOH login screen. **Related Requirement:** To define a message, select Maintenance > Messages > Main Screen.

**Message** — Populates the message selected in the ‘ID’ drop-down list. You cannot edit this message in Events.

*Figure 6-7 Activate Left Message Event*
(12) Set Right Message

Use the Set Right Message event to activate a main screen message to display on the right side of the FOH login screen of order entry terminals. Use this event to override the standard message and activate a special message, such as holiday greetings and new specials. You can change to another message to appear on the right side, such as the previous one, before the EOD occurs. To do this, create another Set Right Message event with another message, and specify a later time of the day.

**ID** — Specifies the message to activate on the right side of the FOH Login screen. **Related Requirement:** To define a message, select Maintenance > Messages > Main Screen.

**Message** — Populates the message selected in the ‘ID’ drop-down list. You cannot edit this message in Events.

*Figure 6-8  Activate Right Message Event*
(13) **Activate Promo**

Use the Activate Promo event to activate and disable a specific promotion for instances when you want to make a promotion available at a certain time, such as a Friday Night Only coupon. If you want to disable a promotion, clear the ‘Active’ option for the event. You can disable a promotion you activated before the EOD occurs. To do this, create another Activate Promo event, clear the ‘Active’ option, and specify a later time of the day.

**Promo** — Specifies the promotion to activate or disable. **Related Requirement:** To define a promotion, select Maintenance > Payments > Promotions.

**Button Pos** — Specifies the button position on the FOH promotion screen on which you want the promotion to appear or disappear.

**Active** — Activates the promotion. Clear this option to disable the promotion.

![Activate Promo Event](image)
(14) Activate Comp

Use the Activate Comp event to activate and disable a specific comp for instances when you want to make a comp available at a certain time. If you want to disable a comp, clear the ‘Active’ option for the event. You can disable a comp you activated before the EOD occurs. To do this, create another Activate Comp event, clear the ‘Active’ option, and specify a later time of the day.

**Comp** — Specifies the comp to activate or disable. *Related Requirement:* To define a comp, select Maintenance > Payments > Comps.

**Button Pos** — Specifies the button position on the FOH comp screen you want the comp to appear or disappear.

**Active** — Activates the comp. Clear this option to disable the comp.
(16) Set Guest Check Message

Use the Set Guest Check Message event to override the standard message that prints on the guest check and activate a special message to print, such as holiday greetings and new specials. You can change to another message, such as the previous one, before the EOD occurs. To do this, create another Set Guest Check Message event with another message, and specify a later time of the day.

**Figure 6-11  Set Guest Check Message Event**

**ID** — Specifies the message to activate. **Related Requirement:** To define a message, select Maintenance > Messages > Guest Check.

**Message** — Displays the message selected from the ‘ID’ drop-down list. You cannot edit this message in Events.
(17) Set Modifier Item

Use the Set Modifier Item event to add an item to a modifier group, for instances when you want a modifier item to be available. You can change to another modifier item, such as the previous one, before the EOD occurs. To do this, create another Set Modifier Item event with another modifier item, and specify a later time of the day.

![Set Modifier Item Event](image)

**Figure 6-12** Set Modifier Item Event

**Mod Group** — Specifies the modifier group containing the item to activate. *Related Requirement:* To define a modifier group, select Maintenance > Menu > Modifiers.

**Item to Set** — Specifies the item to activate. *Related Requirement:* To define an item, select Maintenance > Menu > Items.

**Position** — Specifies the button position for the modifier on the modifier group.

**Price** — Specifies the price of the modifier item.

**Weight** — Specifies the selection weight of the modifier item.
(18) Set Cashier Menu

Use the Set Cashier Menu event to assign a specific menu to employees assigned to a job code with ‘Cashier’ selected. Add the event, then define a time during which the menu will apply. If you do not specify a time, the menu selected here will be in effect at all times. You can change to another menu, such as the previous one, before the EOD occurs. To do this, create another Set Cashier Menu event with another menu, and specify a later time of the day.

![Set Cashier Menu Event](image)

Figure 6-13 Set Cashier Menu Event

**Menu** — Specifies the menu to activate. **Related Requirement:** To define a menu, select Maintenance > Menu > Menus.
(19) Reroute Video

Use the Reroute Video event to send orders and items designated to display on one video monitor to display on another video monitor. You can change to another routing, such as the previous one, before the EOD occurs. To do this, create another Reroute Video event with another routing, and specify a later time of the day.

![Figure 6-14 Reroute Video Event](image)

**From and To Video** — Select the video monitor to reroute from and the target video monitor.

**Related Requirement:** To define a video monitor, select Maintenance > Hardware > Video Monitors.
(20) Reroute Video Group

Use the Reroute Video Group event to send orders and items designated to display on the monitors in one video group to display on the monitors in another video group. You can change to another routing, such as the previous one, before the EOD occurs. To do this, create another Reroute Video Group event with another routing, and specify a later time of the day.

From and To Video Group — Select the video group to reroute from and the target video group. Related Requirement: To define a video group, select Maintenance > Hardware > Video Groups.

Figure 6-15 Reroute Video Group Event
(22) Reroute Video by Terminal

Use the Reroute Video by Terminal event to send orders and items designated to display on the monitors in one video group to display on the monitors in another video group, by terminal. You can change to another routing, such as the previous one, before the EOD occurs. To do this, create another Reroute Video by Terminal event with another routing, and specify a later time of the day.

**Terminal** — Specifies the terminal associated with the video group. *Related Requirement:* To define a terminal, select Maintenance > Hardware > Terminals.

**From and To Video Group** — Select the video group to reroute from and the target video group. *Related Requirement:* To define a video group, select Maintenance > Hardware > Video Groups.

![Reroute Video by Terminal](image)

*Figure 6-16 Reroute Video by Terminal Event*
(24) Set Job Screen

Use the Set Job Screen event to set the default screen for employees assigned to a specific job code. Add the event, then define a time during which the screen will apply. If you do not specify a time, the screen selected here will be in effect at all times. You can change to another job screen, such as the previous one, before the EOD occurs. To do this, create another Set Job Screen event with another screen, and specify a later time of the day:

![Set Job Screen Event](Image)

**Jobcode** — Specifies the job code associated with the screen. **Related Requirement:** To define a job code, select Maintenance > Labor > Job Codes.

**Screen** — Specifies the screen to activate. **Related Requirement:** To define a screen, select Maintenance > Menu > Screen Editor.
(25) Set Price Change

Use the Set Price Change event to schedule temporary price changes. You can change to another price change, such as the previous one, before the EOD occurs. To do this, create another Set Price Change event with another price change, and specify a later time of the day.

![Set Price Change Event](image)

**Price Change** — Select the price change to activate. **Related Requirement:** To define a price change, select, Maintenance > Menu > Price Changes.

**Revenue Center** — Specifies the revenue center for which the price change is in effect when the event is active.

Figure 6-18  Set Price Change Event
(26) Activate Tender

Use the Activate Tender event to activate and disable a specific tender type, for instances when you want to make a tender available at a certain time, such as gift certificates that are accepted only during the evening hours. If you want to disable a tender, clear the ‘Active’ option for the event. You can disable a tender you activated before the EOD occurs. To do this, create another Activate Tender event, clear the ‘Active’ option, and specify a later time of the day.

Tender — Select the tender to activate. **Related Requirement:** To define a tender, select Maintenance > Payments > Tender.

**Button Pos** — Specifies the button position on the FOH tender screen on which you want the comp to appear or disappear.

**Active** — Activates the tender. Clear this option to disable the tender.

![Activate Tender Event](image)

*Figure 6-19 Activate Tender Event*
(27) Set Pole Message

Use the Set Pole Message event to activate main screen messages in which the ‘Display on Pole’ option is cleared in Maintenance > Messages > Main Screen. If you have main screen messages configured to display on a pole display, and activate another message to display using this event, all messages display in sequence. You can change to another message, such as the previous one, before the EOD occurs. To do this, create another Set Pole Message event with another message, and specify a later time of the day.

![Set Pole Message Event](image)

**Figure 6-20 Set Pole Message Event**

**ID** — Select the message set up for pole display. **Related Requirement:** To define a message, select Maintenance > Messages > Main Screen.

**Message** — Displays the message selected from the ‘ID’ drop-down list. You cannot edit this message in Events.
(28) Disable Void Reason

Use the Disable Void Reason event to disable a void reason.

![Disable Void Reason Event](image)

**Void** — Select the void reason to disable. **Related Requirement:** To define a void reason, select Maintenance > System > Void Reasons.

(30) Disable Price Change

Use the Disable Price Change event to schedule a temporary suspension of a price change. Use this event to end a price change event before the EOD occurs. For example, you use this event for happy hour times.

![Disable Price Change Event](image)

**Price Change** — Select the price change to disable. **Related Requirement:** To define a price change, select Maintenance > Menu > Price Changes.
Revenue Center — Specifies the revenue center for which the price change is no longer in effect when the price change is disabled.

(31) Set Gst Check Footer Msg by Term

Use the Set Guest Check Footer Message by Terminal event to send a guest check message on a per-terminal basis. When set, this event prints any messages defined in Maintenance > Messages > Main Screen along with messages already defined in Maintenance > Messages > Guest Check.

![Set Check Footer Message By Terminal](image)

**Figure 6-23** Set Check Footer Message by Terminal Event

**Terminal** — Specifies the terminal associated with the message. *Related Requirement:* To define a terminal, select Maintenance > Hardware > Terminals.

**ID** — Specifies the message to activate. *Related Requirement:* To define a message, select Maintenance > Messages > Guest Check Messages.

**Message** — Displays the message selected from the ‘ID’ drop-down list. You cannot edit this message in Events.
(33) Reroute Tax

Use the Reroute Tax event to reroute one tax to another. You can change to another routing, such as the previous one, before the EOD occurs. To do this, create another Reroute Tax event with another routing, and specify a later time of the day.

![Reroute Tax Event](Figure 6-24 Reroute Tax Event)

From and To Tax — Specifies the tax to reroute from and the target tax. **Related Requirement:** To define a tax, select Maintenance > Menu > Taxes.

This event supports the Centralized Database Management (CDM) feature in that it enables the corporate data manager to assign a generic tax id to items, no matter which tax record the specific store uses. When CDM is used, the corporate data manager is able to set up events which are specific to a store. Since taxes vary by area, a Reroute Tax event can then be set to reroute the generic tax id to the correct tax for the area. ‘From Tax’ is used to specify the generic tax id and ‘To Tax’ specifies the correct tax id for the area.

To use this feature, the corporate data manager creates the following standard tax records:

1) Default Food  
2) Default Liquor  
3) Default Beer  
4) Default Wine  
5) Default Retail  
6) Default Inclusive Food  
7) Default Inclusive Liquor  
8) Default Inclusive Beer
These are suggested names. The corporate data manager can use any name desired to represent the standard tax records. It is suggested, however, that each tax record have a self-documenting name, so that selection from a list that contains only the Tax Name and Number is not an issue. Tax records 16 - 20 should be reserved for special taxes, such as the tax on the To Go order modes, etc. These special taxes may not be used now, but it is nice to set aside the first tax Ids as the ‘default’ taxes so you can easily differentiate between default taxes and the actual tax records used in the store.

The default tax records are not actually used in the store, so their corresponding rate can be set to a default rate, such as the rate most commonly used (10% or 11%).

Along with the default tax records, all tax records needed to support the organization must be created in the corporate tax file.

When creating items, the corporate data manager assigns the appropriate default tax, therefore, enabling items to be distributed to all stores, regardless of their tax specification.

The corporate data manager then creates tax-rate specific event for each tax record. The event specifies the default tax record, such as Defaulted (1) in ‘From Tax.’ ‘To Tax’ is used to specify the correct tax record, such as 8% Food, which might be tax ID 25 in the Tax file. For ease of use, it is strongly suggested that the corporate data manager adopt the naming convention above for the default tax records, and “#% Tax Type” as the actual store tax records (i.e., use 8.25%Retail for an 8.25% retail tax).

<table>
<thead>
<tr>
<th></th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>9)</td>
<td>Default Inclusive Wine</td>
</tr>
<tr>
<td>10)</td>
<td>Default Inclusive Retail</td>
</tr>
<tr>
<td>11)</td>
<td>Default Secondary Food</td>
</tr>
<tr>
<td>12)</td>
<td>Default Secondary Liquor</td>
</tr>
<tr>
<td>13)</td>
<td>Default Secondary Beer</td>
</tr>
<tr>
<td>14)</td>
<td>Default Secondary Wine</td>
</tr>
<tr>
<td>15)</td>
<td>Default Secondary Retail</td>
</tr>
</tbody>
</table>
(35) Activate Store Specific Item

Use the Activate Store Specific Item event to activate a store specific item configured with a preceding tilde (~) symbol in the short name of the item. This event is commonly used in a Centralized Data Management (CDM) environment where the central site sends items to select stores to be activated at certain times.

![Activate Store Specific Item Event](image)

*Figure 6-25  Activate Store Specific Item Event*

**Item to Activate** — Select the inactive item configured with the tilde (~) symbol in the short name. *Related Requirement:* To define an item, select Maintenance > Menu > Items.

**Item Name** — Denotes the new name of the item to be implemented at the store.
(36) Activate Panel Button

Use the Activate Panel Button event to activate a button on a panel at a specific time. This event is commonly used in a Centralized Data Management (CDM) environment where the central site sends items on a button to select stores to be activated at certain times.

![Activate Panel Button](image)

*Figure 6-26 Activate Panel Button Event*

**Panel** — Specifies the panel containing the button. **Related Requirement:** To define a panel, select Maintenance > Menu > Panel Editor.

**Button** — Specifies the button located on the panel. **Related Requirement:** To define a button, select Maintenance > Menu > Panel Editor.

**Set Button as Inactive** — Disables the button when selected, or activates when selected.
Use the Reroute Secondary Taxes by Revenue Center event to reroute taxes controlled by revenue centers.

Revenue Center — Select the revenue center associated with the tax. Related Requirement: To define a revenue center, select Maintenance > System > Revenue Centers.

From and To Secondary Tax — Select the tax rerouted from and to the target tax. Related Requirement: To define a tax, select Maintenance > Menu > Taxes.
(38) Reroute Display Board

Use the Reroute Display Board event to reroute item information from one display board to appear on another display board. You can change to another routing, such as the previous one, before the EOD occurs. To do this, create another Reroute Display Board event with another routing, and specify a later time of the day.

![Figure 6-28 Reroute Display Boards Event](image)

**Display Board ID** — Indicates the display board to reroute. *Related Requirement:* To define a display board, select Maintenance > Hardware > Display Boards.

**Display From Terminal** — Indicates the new terminal from which the orders will display.
(43) **Activate Movie**

Use the Activate Movie event to activate a movie to play when employees clock in to the system.

**Movie drop-down list** — Specifies the movie to activate.

**Active** — Activates the movie to play when the employee clocks in. Clear this option to disable the movie from playing.

![Figure 6-29  Activate Movie Event](image-url)
(45) Activate Performance Measure

Use the Activate Performance Measure event to activate and disable a specific performance measure. If you want to disable a performance measure, clear the ‘Active’ option for the event.

Performance Measure — Specifies the performance measure you which to activate. Related Requirement: To define a performance measure, select Maintenance > Labor > Performance Measures.

Active — Activates the performance measure. Clear this option to disable the performance measure.
(46) Set Video Color for Items

Use the Set Video Color for Items event to specify the color for the text and background of all items in a specific category. When you select an item from this category in the FOH as a menu item, it will appear on the video screen using the colors specified in this event.

![Set Video Color for Items Event](image)

*Figure 6-31 Set Video Color for Items Event*

**Select Category** — Specifies the category to use to set video colors for items. *Related Requirement:* To define a category, select Maintenance > Menu > Categories.

**Select Text Color** — Specifies the text color to use for items in this category when displayed on the video screen as a menu item.

**Select Background Color** — Specifies the background color to use for items in this category when displayed on the video screen as a menu item.
(47) Set Video Color for Modifiers

Use the Set Video Color for Modifiers event to specify the color for the text and background of all items from a specific category. When you select an item from this category as a modifier item, it will appear on the video screen using the colors specified in this event.

![Set Video Color for Modifiers Event](image)

**Select Category** — Specifies the category to use to set video colors for items when they are entered as modifiers. **Related Requirement:** To define a category, select Maintenance > Menu > Categories.

**Select Text Color** — Specifies the text color to use for items when displayed on the video screen as modifiers.

**Select Background Color** — Specifies the background color to use for items when displayed on the video screen as modifiers.
Required Fields

Use the Required Fields function to require the BOH user to enter certain information into the system. You define information you want to require. For example, if you want all BOH users to remember to enter telephone number information for all employees, include ‘Telephone’ as a required field. The available list of fields display in tab order of the function.

Select Maintenance > System > Required Fields to display the Required Fields function tab.

Currently, you can only require fields from the tabs in Maintenance > Labor > Employees. ‘Social Security’ and ‘Last Name’ display in the ‘Included’ list box, as they are always required. You can not make them optional. When a field becomes required the text box highlights in yellow.

Select the fields to be required entries in the ‘Available’ list box and click > to move them to the ‘Included’ list box. Select the fields in the ‘Included’ list box and click < to move it back to the ‘Available’ list box, therefore, they are not required entries.
Order Modes

Order modes govern the behavior of menu items when they are ordered on order entry terminals. Use the Order Modes function to define the different ways customer orders are received within the restaurant.

The buttons themselves are created, and their primary actions are defined in Maintenance > Menu > Panel Editor. In the Order Modes function tab, the actions of the order mode buttons are refined and specified beyond the basic functions available in the Panel Editor.

The Order Modes function tab provides the following tabs: Order Mode, Order Mode Info, and Delivery Info.

**Mode Number** — Denotes a three-digit ID number that together with ‘Description’ uniquely identifies each Order Mode record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the Mode Number drop-down list, select the record to edit and press Enter.

**Order Mode Tab**

Use the Order Mode tab to establish and define order modes as they appear on the order entry terminal screen. Typical order modes include Dine In, To Go, Appetizers, and Express. You can define up to 999 order modes. Activate order modes by using one of the programmed events in Maintenance > System > Events, or by selecting the ‘Active’ option on the Order Mode tab.
Select Maintenance > System > Order Modes to display the Order Modes function tab.

**Description** — Holds a descriptive name for the order mode.

**Indicator** — Specifies special characters that are used to mark items when ordered at order entry terminals. These special characters, such as ‘-›,’ help make it clear to the server that an item has been ordered with a given mode.

**Header** — Specifies a character string to print on the chit at the beginning of the items sent in that order mode. This string can be simple, such as ‘To Go,’ or descriptive, such as ‘The Following Items To Go’ for a to go order mode.

**Trailer** — Specifies a character string to print on the chit at the end of the items sent in that order mode. This string can be simple, such as ‘To Go,’ or descriptive, such as ‘The Above Items To Go’ for a ‘to go’ order mode.

*Figure 6-34  Order Modes - Order Mode Tab*
**Printer Group** — Sets the routing for items ordered in the defined order mode. The selection in the Order Mode function tab overrides all other printer routing in the Aloha menu system. This selection must be active only in those cases where specific routing is needed for the defined order mode, such as a special printer for To Go orders. If no special routing requirements exist for the defined order mode, this selection should be set to None. If you need to add or modify a printer group, click Printer Group to access the Printer Groups function. When you modify a printer group, the change applies to all areas assigned to that printer group.

**Tax ID** — Overrides all other tax methods in the Aloha menu system and is used if there are specific requirements for the defined order mode. If there are no special tax requirements for the defined order mode, this selection should be set to None. If you need to add or modify a tax, click Tax ID to access the Taxes function. When you modify a tax, the change applies to all items assigned to that tax.

**Active** — Sets the defined order mode to active. **Related Requirement:** You can also activate an order mode with the ‘Activate Order Mode’ event in Maintenance > System > Events.

**All Items** — Sends all unordered items on the guest check to the kitchen when you touch the order mode button. Otherwise, the employee must select the items on the check and touch the order mode button. **Related Option:** To include ordered items, select ‘Include Ordered Items.’

**Include Ordered Items** — Sends all unordered and ordered items on the guest check to the kitchen when you touch the order mode button. **Required Option:** You must select ‘All Items’ to enable this option.

**Tippable Sales** — Used to include items sold with the defined mode as tippable sales. You should not select this option for order modes that are not subject to tipping.

**Include in Interval Total** — Includes sales ordered with this order mode in the current interval of the Interval report. This is used for cafeteria environments using Table Service. **Related Option:** To define the Interval report to print, clear ‘No Interval Report’ in Maintenance > Store Settings > Printing group > Reports tab.
Order Mode Info Tab

Use the Order Mode Info tab to define category inclusion, fixed charges and non-taxable situations on this tab. Select the Order Mode Info tab from the Order Modes function tab.

![Order Mode Maintenance](Image)

*Figure 6-35  Order Modes - Order Mode Info Tab*

**Service Charge Group Box**

Use the Service Charge group box to define requirements for using service charges.

- **Service Charge** — Enables the use of a surcharge applied to the order mode and activates the options available in the group box.

- **Charge Line Text** — Specifies the text for an additional line to print on the guest check.

- **Tax** — Specifies the tax method, if any, to apply to the service charge. If you need to add or modify a tax, click Tax to access the Taxes function. When you modify a tax, the change applies to all items assigned to that tax.
**Fixed** — Designates the service charge is a fixed monetary value. If selected, the amount entered in the adjacent text box is added to the guest check when you apply the order mode. For example, if there is a $2.00 charge for ‘To Go’ items, select ‘Fixed,’ then type 2.00 in the adjacent text box.

**Percentage** — Designates the service charge is treated as a percentage rate. If selected, the percentage rate entered in the text box to the right is used to calculate a percentage of the guest check total. The amount is added to the guest check when this order mode is applied. For example, if there is a 10 percent up-charge for ‘To Go’ items, select ‘Percentage,’ then type 0.10 in the adjacent text box.

**Round To Nickel** — Rounds the order mode charges, if any, to the nearest nickel. For example, if a ‘To Go’ charge is $1.98, it is rounded to $2.00.

**Non Taxable Except Group Box**

Use the Non Taxable Except group box to specify items that are tax exempt.

**Non Taxable Except** — Used to treat the selected order mode as nontaxable, with the exception of the category selected in the ‘Category’ drop-down list associated with this option.

**Category** — Specifies the category of items you want to tax. If you need to add or modify a category, click Category to access the Category function. When you modify a category, the change applies to all items assigned to that category.

**Other Options on the Order Mode Info Tab**

**Expediter Printer** — Reroutes the global expediter printer to another printer. Required Option: You must define an expediter printer in Maintenance > Hardware > Printers to operate this feature. If you need to add or modify a printer, click Expediter Printer to access the Printers function. When you modify a printer, the change applies to all areas assigned to that printer.

**Print Bar Code on Expediter** — Prints the bar code number on the expediter’s chit.
Exclude Additional Charges — Indicates additional charges are not included when items are ordered in this order mode. The following scenarios illustrate this functionality:

- If all items on the guest check are rung up under an order mode that excludes the additional charge, it is not applied to the guest check.
- If the guest check includes items rung up under two or more order modes and one allows an additional charge that is set up as a percentage, the percentage applies only to the order mode set with the additional charge.
- If the guest check includes items rung up under two or more order modes and one order mode is set with a flat fee additional charge, the entire amount of the flat fee is applied to the guest check.

Delivery Info Tab

Use the Delivery Info tab to establish the way a delivery ticket prints. This tab will only be present if Delivery/Frequent Buyer is installed. Delivery/Frequent Buyer is part of the Customer Management Solutions package. Delivery/Frequent Buyer is a program used to track customer sales history. It also provides the ability to set up different programs to reward and encourage guests to buy more frequently with the use of coupons and bonus plans.

Refer to the Aloha Delivery/Frequent Buyer Implementation Guide for more information on configuring and using the Aloha Delivery/Frequent Buyer program.
Print Name — Prints the name of the guest from the delivery database.

Print Phone Number — Prints the phone number of the guest from the delivery database.

Print Short Address — Prints an abbreviated address of the guest from the delivery database.

Print Long Address — Prints the full address of the guest from the delivery database.

Print Directions — Prints the address of the guest from the delivery database.

Print User 1 field — Prints the text in the ‘User 1’ option form the delivery database.

Print User 2 field — Prints the text in the ‘User 2’ option from the delivery database.

Delivery Printing Location — Specifies the position on the check the delivery information prints.
Order Entry Queues

Use Order Entry Queues to organize and route incoming orders to reflect your store’s check numbering system and ordering methods. Typically, order entry queues section off terminals, such as Drive Thru, Counter, Bar, and more. You can establish the default order mode for the queue, assign a bitmap to the button to signify the queue, set the number of orders that can remain open, and assign numbers to the orders. Automatic processes such as credit card order closure, printing, and new order opening are also controlled here.

Select Maintenance > System > Order Entry Queues to display the Order Entry Queues function tab.

Figure 6-37 Order Entry Queues Function Tab

**Queue ID** — Holds a two-digit number that together with the ‘Name’ uniquely identifies each order entry queue.

**Name** — Holds a descriptive name for the queue, such as Drive Thru, Counter, and Bar.

**Default Order Mode** — Establishes the order mode that is automatically selected for the queue.
**Bitmap** — Assigns an image to display on the header of each order that visually identifies the queue from which the order originated.

**Auto Close?** — Closes credit card orders automatically when approval is received.

**Auto Print?** — Prints guest check when the order closes.

**Auto Open New Order?** — Opens a new order when the previous order closes.

**Max Open Orders** — Defines the maximum number of orders that can remain open simultaneously in the order queue.

**Minimum Order #** — Sets the minimum number that the system will assign to the order.

**Maximum Order #** — Sets the maximum number that the system will assign to the order.

**Order # Prefix** — Sets a prefix that appears in front of the order number.
Revenue Centers

Use the Revenue Centers function to summarize income from different sections in the restaurant, such as the drive-thru window, a patio, dining area, a main dining area, or a take-out service. These income sources are reported as revenue centers on the various financial reports available through the Aloha system.

Select Maintenance > System > Revenue Centers to display the Revenue Centers function.

The Revenue Centers function provides the following tabs: Options and PMS Options.

Code — Holds a three-digit number that together with ‘Name’ uniquely identifies each revenue center. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the ‘Code’ drop-down list, and press Enter.

Options Tab

Use the Options tab to disable tips and specify whether to wait for a credit card authorization.

![Image of Revenue Centers - Options Tab]

*Figure 6-38  Revenue Centers - Options Tab*
**Name** — Determines the name for the revenue center, such as Bar, Counter, Dining Room, and Drive Thru.

**Disable Tips** — Disables tip tracking for the selected revenue center only. The system does not prompt you to enter a tip, print a tip line, however, you can adjust tips for payments tendered from this revenue center. **Related Option:** This option overrides the ‘Tips’ option in Maintenance > Payments > Tenders > Tender tab.

**Wait for Credit Card Authorization** — Pauses the terminal while a credit card transaction is taking place. The Authorization in Progress screen displays during credit card authorizations and the terminal is not available for input until the authorization is complete.

**Print Receipt on Close Check** — Used to determine how often to print a receipt when a check is tendered on a terminal linked to the specific revenue center. Three selections are available:

- **Never** — Prevents receipts from printing when a check is closed on a terminal linked to the specific revenue center.
- **Always** — Forces a receipt to always print when closing a check on a terminal linked to the specific revenue center.
- **Default** — Disables the Print Receipt option and reverts to the default settings in the Tender functions to dictate whether or not a receipt prints.

**PMS Options Tab**

Use the PMS Options tab to configure printing and refine the configuration of the revenue center when interfaced with a Property Management System (PMS). The voucher and expediter printers are also definable on this tab.

Refer to the Interfacing PMS with Aloha User Guide for more information on configuring and using a PMS interface.
Select the PMS Options tab from the Revenue Centers function.

**PMS Group Box**

Use the PMS group box to define options related to the PMS interface. If you do not define information on this tab, the ‘+Tip’ text prints on the check by default when you select ‘Print Signature Line’ in Maintenance > Payments > Tenders > Type tab.

**Tip Line Text** — Replaces the standard text on the tip line defined in the ‘Print Signature Line.’

**Room Line Text** — Replaces the standard text on the room line defined in the ‘Print Signature Line.’

**Verify PMS Info on all Tenders** — Requires the verification of the room number for all tenders applied as payments in this revenue center. **Required Option:** You must select ‘Use Property Management System (PMS)’ in Maintenance > Store Settings > Hotel group to enable this option.
Day Parts

Use the Day Parts function tab to define specific blocks of time used to divide the parts of the day. These time blocks organize business data for reporting purposes and enable other Aloha features that rely on defined day parts, such as event scheduling, surveys, and tip sharing.

Select Maintenance > System > Day Parts to display the Day Parts function tab.

![Day Parts Function Tab](image)

**Day Part #** — Holds a two-digit number that together with ‘Description’ uniquely identifies each day part. Up to 99 day parts can be defined. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the ‘Day Part #’ drop-down list, and press Enter.

**Description** — Determines the name of the day part. The name should be descriptive of the day part for ease of reference.

**Start Time** — Determines the start time of the day part. Enter the time using a 24-hour clock format. Hours are entered on the left, minutes on the right. For example, enter midnight as 00:00 or 5:00 p.m. as 17:00. You cannot enter anything higher than 23:59.
Concepts

Use the Concepts function to identify separate stores operating from the same database. Concepts are an increasingly common convention in the corporate-to-store hierarchy where a master database is used to conform to multi-branding operations. For example, a master database that corporate maintains may include menus and items for all supporting operations, such as an ice cream parlor, donut shop, and more, but are only used in their respective store. This provides top-level reporting capabilities per store in the Sales report and PMix report. The PMix report displays two columns for quantity count and percentage sold for each concept.

When you define concepts, they are assigned to individual items in Maintenance > Menu > Items for proper distribution. For example, an item pepperoni, is sold only at one concept, therefore, that concept is attached to the item, pepperoni. 100% of sales for that item is reported to the concept.

If you configure items to be shared throughout stores, such as beverages, a common distribution must be determined to distribute sales to the proper concept. The concept, ‘None’ should be attached to all common items in the master database. Common items, however, is not a recommended technique and should only be administered on an existing master database. For new databases, it is recommended to assign individual items per concept.
Select Maintenance > System > Concepts to display the Concepts function tab.

**Figure 6-41  Concepts Function Tab**

**Number** — Holds the ID number for the concept.

**Description** — Determines the name of the concept. The name should describe the concept for ease of reference.

**Common Distribution %** — Determines the percentage of transaction data for common items. The total of all defined concepts must equal 100%. If the total distribution of all concepts does not equal 100%, the system recalculates the percentages, as necessary. The sales for common items are distributed between the concepts for reporting purposes.
Void Reasons

Use the Void Reasons function to define a list of reasons an item is voided from the FOH for auditing and reporting purposes. You can configure each void reason to affect or not affect inventory within the Aloha system.

If an employee is assigned to a job code with ‘Allow to void own items’ selected, Void Reasons do not display on the screen and no password is requested. The Void Report will show ‘Void Reason UNKNOWN.’

When an employee attempts to delete an item that has been sent to the kitchen from a guest check, a reason for the void must be selected. If the employee is assigned to an access level with ‘Void Items’ selected, they can enter their password at the ‘Enter manager password’ prompt, select a reason for the void, and complete the transaction. If they are not, a manager is required to complete the transaction. If the employee is assigned to a job code with ‘Allow to void own items’ selected, no password message or void reasons will display.

Select Maintenance > System > Void Reasons to display the Void Reasons function tab.

![Figure 6-42 Void Reasons Function Tab](image-url)
**ID** — Holds an unused two-digit number that together with ‘Description’ uniquely identifies each void reason. To create a new record, enter an unused ID and press Enter. To edit an existing record, select it from the ‘ID’ drop-down list, and press Enter.

**Description** — Designates the name of the void reason. The name should be descriptive of the reason for the void, for ease of reference.

**Return Voided Items to Inventory** — Used to characterize each void reason type according to its effect on inventory. Void reasons that affect inventory add the item back into inventory and allow the item to be sold again. Void reasons that do not affect inventory do not change the inventory count or item availability. **Related Option:** The system also provides the ability to set a time limit on voids. After the specified time interval expires, the system no longer accepts a void for a given order. To set a time limit to void items, select ‘Restrict Void Items’ and specify a time interval in minutes in Maintenance > Store Settings > Security > Restrictions tab.
No Sale Reasons

Use the No Sale Reasons function tab to define or change No Sale Reasons. When a cash drawer is opened or other actions take place that can potentially impact the interpretation of the daily sales and business reports, it is often useful to have that action accompanied by a No Sale Reason message in the daily reports.

If an employee is assigned to an access level with ‘No Sale’ selected, the Open Drawer button is available, otherwise it does not display on the FOH terminal. When this button is selected without first entering a sale, a reason for the no sale must be selected. To disable the prompt for a no sale reason, you must not have any no sale reasons defined.

Select Maintenance > System > No Sale Reasons to display the No Sale Reasons function tab:

![Figure 6-43 No Sale Reasons Function Tab]

**ID** — Holds a two-digit number that together with ‘Description’ uniquely identifies the record. Up to 10 no sale reasons may be entered. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the ‘ID’ drop-down list, and press Enter.

**Description** — Designates the name of the no sale reason. The name should be descriptive of the reason, for ease of reference.
Petty Accounts

The Petty Accounts function tab provides the ability to define a tracking system for petty cash transactions. There are two types of accounts, Cash In accounts for petty cash ‘Paid Ins,’ and Cash Out accounts for petty cash ‘Paid Outs.’ The system permits up to 20 petty cash accounts.

Select Maintenance > System > Petty Accounts to display the Petty Accounts function tab.

[Image: Petty Accounts Function Tab]

**ID** — Holds a five-digit ID number that together with ‘Name’ uniquely identifies each petty cash account record. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the ‘ID’ drop-down list, and press Enter.

**Name** — Designates the name of the petty cash account.

**Tender** — Applies to cash out accounts only. Only non-cash tenders are displayed for selection. If a cash out account has a non-cash tender attached, the cash out does not show on the regular Paid Out section on the Server Checkout. This amount displays in the non-cash transactions section in the audit section of the checkout report.
Affects Deposit — Used to note whether activity in the defined account affects bank deposits. If money is simply being moved to or from the safe, the deposit is not affected. If the money is paid to a vendor, the deposit is affected. **Related Requirement:** When using the Tip Out functionality and creating a petty cash account, make sure ‘Affects Deposit’ is not selected.

**Cash Accounts Group Box**

Use the Cash Accounts group box to determine if the account is a cash in or cash out account.

**Cash In Account** — Used to mark the account as an account that receives cash payments.

**Starting Bank** — Displays the starting bank count screen to include the cash in account. **Required Option:** You must select ‘Cash In Account’ to enable this option.

**Cash Out Account** — Used to mark the account as an account that disburses cash payments.
Routing Levels

Use the Routing Levels function to control of routing from one place to another for items waiting in a queue. You can specify item routing within your restaurant that takes maximum advantage of the strengths of your restaurant staff and facilities. Change video group assignments to reroute the display of pending orders from one area of the restaurant to another. Routings specified in Routing Levels override any other routing specifications.

Select Maintenance > System > Hardware to display the Routing Levels function tab.

**Routing Level** — Specifies the routing level to use for routing queues.

**Name** — Denotes the descriptive name of the routing level.

**Queue** — Specifies the queue in which to route. *Related Requirement:* To define a queue, select Maintenance > System > Order Entry Queue.

**Routes from** — Identifies the video group to which the queue being rerouted belongs.

**Routes to** — Identifies the video group to which the queue being rerouted is to be reassigned.

*Figure 6-45 Routing Levels Function Tab*
Remember to specify queue, source video group, and destination video group on the same line for each routing. If one of these three elements is missing for a given routing, the desired action will not take place.
Volume Levels

The Volume Levels feature is available when you are using remote display systems. This feature displays a suitable descriptive name on the order entry terminals that relates to the level of business that is taking place in the restaurant in a specified time interval. The names are defined by specific gross sales levels. For example, if a ‘Slow’ level is defined as $0.01 to $199.00, and if this is the level of sales on record, the order entry terminal will display ‘Slow.’

Defined time intervals are cumulative and relate to the present moment. For example, if the time interval is defined as 30 minutes, the volume level reported on the order entry terminal will reflect the amount of business on record in the 30 minutes immediately prior to that moment.

This feature also provides the ability to set promise time for delivery items at specific levels of business. Promise times are set for increasing amounts of time as the level of business increases.

Refer to the Interfacing Video Display Systems with Aloha User Guide for more information on configuring and using video.

Figure 6-46  Volume Levels Function Tab
**Volume Level** — Holds a four-digit number that in combination with Name uniquely identifies the Volume Level record.

**Name** — Identifies the volume level.

**Low Amount** — Indicates a dollar amount representing the least amount of product sold for that volume level in the time interval.

**High Amount** — Indicates a dollar amount representing the maximum amount of product sold for that interval record in the time interval.

**Promise Time** — Indicates an amount of time representing the expected delay for a delivery item at the stated level of business. For example, if the business is slow, you might enter 15 minutes. However, if the business level is high, you might enter 35 minutes to reflect the expected additional delay.
Surveys

Use the Customer Survey feature to provide restaurants the ability to prompt randomly selected guests for feedback about their dining experience. The prompts print on the guest check, along with a phone number for the customer to call and take a customer survey, or poll, in exchange for a reward or discount. You can define the times the survey is valid, the frequency the survey prints for a specific day part, the text to appear in the survey, and can print up to a 16-digit code for reference information.

Refer to the Customer Survey Feature Focus Guide for more information on configuring and using surveys.

ID — Holds a five-digit number that uniquely identifies each survey record. To create a new record, enter an unused number and press Enter. To edit an existing record, select it from the drop-down list, and press Enter.

The Survey function contains the following tabs: Settings, Banner, Message 1, Message 2, and Message 3.

Settings Tab

Use the Settings tab to define the main parameters of the survey process. You can use this tab to determine the dates and day parts in which the survey occurs, define the type of code, if any, that will be assigned to each survey participant, and determine the frequency at which the survey prints on guest checks during each day part selected.
Select the Settings tab from the Surveys function.

**Figure 6-47 Surveys - Settings Tab**

**Description** — Designates a descriptive name for the survey.

**Start Date** — Specifies the date the survey is to begin printing on the guest check.

**End Date** — Specifies the date the survey is to stop printing on the guest check.

**Active** — Indicates the survey is active and will begin printing after the next End-of-Day.
Print survey separately — Prints the survey separately from the guest check. The survey always prints when the frequency is met, even if you configure the guest check not to print for a transaction. The table following table describes how the survey prints for four possible scenarios:

<table>
<thead>
<tr>
<th>Survey Printing Separately Option</th>
<th>Guest Check Printing</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected</td>
<td>Configured</td>
<td>The system prints a slip for the guest check, followed by a slip for the survey.</td>
</tr>
<tr>
<td>Selected</td>
<td>Not configured</td>
<td>The system prints a slip only for the survey.</td>
</tr>
<tr>
<td>Cleared</td>
<td>Configured</td>
<td>The system prints a slip for the guest check with the survey embedded.</td>
</tr>
<tr>
<td>Cleared</td>
<td>Not configured</td>
<td>The system prints a slip only for the survey.</td>
</tr>
</tbody>
</table>

Code Output — Determines the number of digits to include in the survey code.

- **No Code** suppresses the printing of a code number with the survey.
- **10 Digit** prints a unique 10-digit code on the guest check. This code contains the unit number, current hour the check is closed, current date, and the current month.
- **15 Digit** prints a unique 15-digit code on the guest check. This code contains the guest check number, current hour the check is closed, current date, and the current month.
- **16 Digit** prints a unique 16-digit code on the guest check for restaurants utilizing five-digit unit numbers. This code contains the guest check number, current hour the check is closed, current date, and the current month.
- **20 Digit** prints prints a unique 20-digit code on the guest check for restaurants utilizing more than 9 terminals. This code contains the guest check number, current hour the check is closed, current date, and the current month.

Day Part/Frequency setup Group Box

Use the Day Part/Frequency setup group box to specify the day part and the frequency in which the survey prints for the corresponding day part.

**Day Part** — Determines the day part for which the survey prints. Select one to four day parts from the ‘Day Part’ drop-down lists.
**Frequency** — Determines the frequency in which the survey prints for the corresponding day part. For example, if you enter 5 for the ‘Breakfast’ day part, the survey prints on every fifth guest check during the Breakfast day part.

**Banner Tab**

Use the Banner tab to enter the banner message to print on the guest check. Select the Banner tab to define the message that introduces the customer survey. Select the Banner tab from the Survey function.

![Banner Tab Screenshot](image)

**Figure 6-48 Survey - Banner Tab**

**Banner 1 to Banner 10** — Designates the banner text to print on the guest check to introduce the customer survey. Enter the text beginning in ‘Banner 1’ and continue in sequence until you finish the banner.

**Message 1 Through Message 3 Tabs**

You must define the text to instruct your guests how to complete the survey. This text is called the message, and it prints after the line item information and before the first subtotal line. Use the ‘Message 1’ through ‘Message 40’ text boxes on the three Message tabs, successively, to type the text for the message.
The survey supports special characters, placed alone on a text line, to input the end date and the code into the survey:

@ — Prints the end date of the survey on a single line of the guest check.

^ — Prints the survey ID code on a single line of the guest check.

Select the Message tabs to enter the body of the survey.

*Figure 6-49  Survey - Messages Tabs*

**Message 1 to Message 40** — Designates the message text to print on the guest checks to provide instruction to your guests for completing the survey. Enter the message starting in ‘Message 1’ and continuing in sequence until you finish the message.
Hardware Maintenance Functions

This chapter discusses the setup and configuration of hardware that is typically attached to the Aloha system, such as terminals, cash drawers, printers, and video devices.

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The Hardware configuration features available in the Aloha system provide significant flexibility as well as extensive capabilities.

Select Maintenance > Hardware to access the Hardware menu.

![Hardware Menu](image)

**Figure 7-1** Hardware Menu

In the context of an operating restaurant, several types of hardware are typically attached to the system server and the order entry terminals. This hardware provides communication between the manager and the employees, between the restaurant and the customer, and between the restaurant and credit card companies.

Some of the hardware will be output devices, such as remote display systems and printers. Other devices will be bi-directional, such as cash card readers.

In this chapter you learn how to:

- Define and configure terminals and associated reader and display devices.
- Set up and define cash drawers.
- Set up and define printers.
- Define printer groups.
- Define labels.
• Define video groups.
• Set up and define display boards.
Terminals

Each Aloha system installation is licensed for a specific number of order entry terminals, each of which serves as a node or station on the Aloha network. Additional nodes are permitted beyond the licensed number of order entry terminals, but the additional nodes cannot be defined or used as order entry terminals. For example, a large system licensed for ten order entry terminals might define an additional network node for a file server. The file server would function normally on the network, but could not be used as an order entry terminal, and thus would not exceed the network license limitations. The typical Aloha POS network consists of one order entry terminal per license and one computer functioning as a file server for the network. The file server is normally located in an area of the restaurant that is only accessible by management personnel. Computers running remote copies of Aloha Manager, used by managers for routine database maintenance, do not count against the license count, and can not function as order entry terminals.

Peripheral devices, such as printers, pole displays, bar code readers, cash drawers, mag card readers, and monitors are physically attached to these nodes to become part of the network. Some of these devices, such as printers and monitors (display only), are defined in their own database files and are assigned to a network node while others, such as pole displays, are defined within a terminal record.

Printers and monitors, although attached to a specific network node, are devices shared across the network. Pole displays, also attached to a specific network node, are not shared devices and are available only to the assigned terminal. Thus, an order entry terminal can have access to a printer in the kitchen, but not to a cash drawer at the drive-thru window or bar.

The Terminal function tab allows the user to define and configure each terminal on the Aloha network in terms of its type, its physical characteristics, and the attached peripherals.

As you create new terminal records, it is important to note that Revenue Center and Term Queue are required. If no queue for the terminal is specified, the system does not allow you to save the record. If no revenue center is assigned, a warning sign appears to indicate the reports may not balance. For correct income reporting in the restaurant, we recommend you select a revenue center for the terminal.

You can define as many terminals as there are nodes on the network, as long as the number of terminals defined as order entry terminals does not exceed the number provided under the Aloha license agreement. Terminals are designated as order entry terminals using the Order Entry Terminal option on the General tab.
Select Maintenance > Hardware > Terminals to display the Terminals function tab. The Terminals function provides the following tabs: General, Readers, and Other.

**Term ID** — Indicates the unique, three-digit number that identifies the terminal record. The terminal number, combined with the ‘Name,’ creates a unique ID for each terminal record in the system. This option has a value range of 1 to 999. To create a new record, type an unused number and press Enter.

**General Tab**

Use the General tab to define the terminal itself, and to define its print output. You can also establish the input screen available to the terminal. Select the General tab from the Terminals function.

**Name** — Holds a descriptive name for the terminal. Terminal naming conventions are user-defined; however, we recommend the printer name be descriptive or reflect its physical location, such as Bar 1, Pantry, Patio, or Dining. This option has a maximum of 15 characters. The name is useful in the case of a terminal failure because the error message displays the specific location. It is also useful when you need to troubleshoot the network.
Printers Group Box

Use the Printers group box to define and direct the output of the terminal to printers in the restaurant, according to your needs. This capability provides the flexibility to print kitchen orders, labels for take-out orders, credit-card receipts, and guest checks, on different printers in different locations within the restaurant.

**Default Printer** — Specifies a previously defined printer that may or may not be physically attached to the terminal. The default printer is typically the printer used for local printing by the defined terminal. Local printing includes guest checks, printed reports, and messages. The actual physical connections between a terminal and a printer are set up in Maintenance > Hardware > Printers. If you need to add or modify a printer, click Default Printer to access the Printer function.

**Voucher Printer** — Designates the printer for EDC credit card vouchers. This also requires a previously defined printer that may or may not be physically attached to the terminal defined in the terminal record. If you need to add or modify a printer, click Voucher Printer to access the Printer function.

**Label Printer** — Specifies a previously defined printer that may or may not be attached to the terminal, used to print labels that accompany take-out orders. If you need to add or modify a printer, click Label Printer to access the Printer function. **Required Option:** You must select a ‘Label Type’ for this option.

**Label Type** — Indicates the specific type of label printer you wish to use. If you need to add or modify a label, click Label Type to access the Label function. **Required Option:** Use must select ‘Label Printer’ to enable this option.

Terminal Type Group Box

The Terminal Type group box allows you to define the type of terminal in the terminal record. If the type of terminal you are using does not appear in the drop-down list, contact Technical Support for help with selecting an appropriate terminal type from the list.

**Order Entry Terminal** — Designates the defined terminal as an order entry terminal. The Aloha system license does not restrict the number of terminals; however, the number of order entry terminals available depends upon the number permitted by the license agreement for the restaurant.
**Restrict Order Entry** — Limits the ability to enter transactions if the employee is not assigned a cash drawer or is not configured for self banking. **Required Option:** You must select ‘Order Entry Terminal’ to enable this option. **Related Option:** The ‘Self Banking’ option in Maintenance > Labor > Job Codes > QuickService tab overrides this option.

**Interface Terminal** — Designates the defined terminal as an interface terminal. The license agreement for the restaurant must include a specific number of order-entry terminals. When the selected terminal is designated as an interface terminal, an order-entry terminal must be defined as its output terminal.

**Interface Server** — Defines the file server as an order entry terminal as well, to run the Aloha FOH application without a user interface. The FOH application then functions to receive order information from other order entry devices, such as hand-held input devices, and distributes that information to other devices, such as printers, display screens, and cashier terminals. The file server, when used in this manner, performs FOH functions without the need for an order entry terminal license.

**Screens Group Box**

Use the Screens group box to define a specific screen to display on the selected terminal.

**QS Screen** — Specifies a previously created QuickService order entry screen to display on the selected terminal. Screens defined in QuickService are intended to work with the order entry screens on the FOH terminals. If you need to add or modify a screen, click QS Screen to access Panel Editor.

**Other Options on the General Tab**

**Revenue Center** — Attaches the terminal to a previously defined revenue center. As you create new terminal records, it is important to note that Revenue Center is a required option. If you need to add or modify a revenue center, click Revenue Center to access the Revenue Center function.

**Store** — Associates a terminal with a particular store in systems using SuperSite. This function is unavailable unless SuperSite is installed. If you need to add or modify a store, click Store to access the Stores function.

**Term Queue** — Defines the queue from which the terminal is to receive orders. If you need to add or modify an order entry queue, click Terminal Queue to access the Order Entry Queue function.
**Order Mode** — Defines the type of orders the terminal is to receive (Example: Dine-In, To Go, and more). If you need to add or modify an order mode, click Order Mode to access the Order Modes function.

**EDC Info** — Assigns the terminal to a particular processor index. Use this option when you configure a processor with multiple indexes in EDC. For example, if there is a CES, CES2, and CES3 processor defined in EDC, and you need to assign this terminal to the CES2 processor, type INDEX=2 in the ‘EDC Info’ text box. If there is only one processor index for the processor, no entry is required in this text box. This option has a maximum of 50 characters.

**Interface Host** — Designates the order-entry terminal to receive the output of an interface terminal. Click the drop-down list to select the order-entry terminal. *Required Option:* You must select ‘Interface Terminal’ as the terminal type to enable this option.

**Readers Tab**

Use the Readers tab to define any of several input devices that are used to identify customers or employees, and to interface with their credit card companies, as appropriate. Select the Readers tab from the Terminals function.

![Figure 7-3 Terminals - Readers Tab](image)
**Magnetic Stripe Reader Group Box**

Use the Magnetic Stripe Reader (MSR) group box to connect this terminal to a magnetic stripe reader and define other settings.

**Use Mag Stripe Reader** — Indicates a magnetic stripe reader is physically attached to the defined terminal. If you do not use a magnetic stripe reader, clear this option. **Required Option:** You must select a magnetic stripe reader ‘Type’ for this option.

**Type** — Indicates the type of magnetic stripe reader attached to the terminal. **Required Option:** You must select ‘Use Mag Stripe Reader’ to enable this option.

**OPOS** — Indicates the name of the OPOS MSR driver file as it appears in the Registry Editor (Note: You must install the driver files first). For example, the OPOS name for a Panasonic MSR would be JS-9000MSR. To determine this, access a DOS command line, type REGEDIT and press Enter. The Registry Editor appears. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEfor-Retail, ServiceOPOS, and MSR. The installed drivers display under MSR. Determine the name of the driver file to use and type it in the ‘OPOS’ text box. This option has a maximum of 30 characters.

**Track 2 Only** — Indicates the magnetic stripe reader only reads track two on the card you are sliding across the MSR.

**Bar Code Reader Group Box**

The Bar Code Reader group box allows you to connect this terminal to a bar code reader and define other settings.

**Use Bar Code Reader** — Indicates a bar code reader is physically attached to the defined terminal. If a bar code reader is not used, clear this option. **Required Option:** You must select a ‘Port’ and a ‘Type’ for this option.

**Port** — Specifies the physical port where the bar code reader connects to the terminal. **Required Option:** You must select ‘Use Bar Code Reader’ to enable this option.

**Type** — Defines the type of bar code reader attached to the terminal. **Required Option:** You must select ‘Use Bar Code Reader’ to enable this option.
Pen Reader Group Box

The Pen Reader group box allows you to connect a pen reader device to this terminal and define the port to use. The pen reader feature enables the use of an electronic ‘pen,’ styled much like a typical ball-point pen, for employee identification for purposes of clock-in and log-in access to the Aloha system. After setting up each terminal, as appropriate, to use a pen reader, you must give managers permission to enroll pen IDs in the system and assign them to individual employees. **Required Option:** To enable a manager to assign a pen reader to an employee, you must select ‘Assign Pen IDs’ in Maintenance > Labor > Access Levels > Employees tab for the access level, and assign the access level to a manager.

The ‘Assign Pen Reader’ button is added to the FOH System screen to assign pen IDs. When a manager touches the button, the system checks the access level granted to the individual manager. If this function is enabled in his or her profile, the pen ID assignment process begins.

**Use Pen Reader** — Enables pen readers in the system. **Required Option:** You must select a ‘Port’ if you select this option.

**Port** — Defines the physical port where the pen reader connects to the terminal. **Required Option:** You must select ‘Use Pen Reader’ to enable this option.

Fingerprint Scanner Group Box

Use the Fingerprint Scanner group box to activate and define a fingerprint scanner for use with the system. The Aloha system makes use of biometrics technology, so no actual fingerprints are stored in the system. A pattern of ‘landmarks’ is used when comparing an individual against the database.

The Aloha system uses the identification process, rather than verification. Identification as a process is potentially faster, in that it is a one-step process. The system reads the scanned finger then proceeds through the previously defined levels in the system to locate a match. Verification is a two-step process, in which the person seeking access to the system clocks or logs in, then presents his or her finger for verification of identity against patterns stored in the database.

Refer to the Aloha Fingerprint Scanner Feature Focus Guide for more information on configuring and using a fingerprint scanner.
**Use Fingerprint Scanner** — Enables the fingerprint scanner function in the system. Click the drop-down list to select the appropriate fingerprint scanner. **Required Option:** You must select a ‘Type’ for this option.

**Type** — Indicates the type of fingerprint scanner you wish to use. **Required Option:** You must select ‘Use Fingerprint Scanner’ to enable this option.

After setting up each terminal, as appropriate, to use a fingerprint scanner, you must also complete the steps outlined below to activate this capability in your system. You must define the employees who must use the fingerprint scanner for log in or clock in purposes. You must also select the managers access level and enable fingerprint enrollment capability. **Required Options:**

1) You must select ‘Must use Fingerprint Scanner - Clock In’ and ‘Must use Thumb Scanner - Log In/JIT’ to require the employee to use the fingerprint scanner to clock in and log in using the fingerprint scanner. If the employee touches ‘Exit’ to let another person use the terminal, or to perform other tasks, the fingerprint scanner must be used to return to active use of the terminal.

2) To allow managers access to enroll new fingerprint patterns in the system, select ‘Enroll Fingerprint’ in Maintenance > Labor > Access Levels > Employee tab.

**Proximity Reader Group Box**

Use the Proximity Reader group box to activate and define a proximity reader device for payment use. Proximity readers enable you to accept a payment from a guest by having them tap a contact-less sensitive card to the device, instead of handing you their credit card. Currently, the Aloha system supports the VivoPay 4000, either mounted as a stand-alone device or attached to the POS terminal. The Aloha system also supports the drive-thru (DT) model. The DT model is basically the same as the VivoPay 4000, except it is enclosed in a hard case, for outdoor use. Both models are configured, and function, in the same manner.

**Use Proximity Reader** — Enables you to attach a proximity reader device to the terminal. **Related Option:** This option enables the ‘Port’ drop-down list.

**Port** — Specifies the port to use for the proximity reader. **Required Option:** You must select ‘Use Proximity Reader’ to enable this option.
Other Tab

Use the Other tab to define and configure any of several output devices that are used to communicate with, or to supply change to, the customer. You can also enable PIN pads for use with debit cards on this tab. Select the Other tab from the Terminals function.

Pole Display Group Box

Use the Pole Display group box to connect a pole display to this terminal and define other settings.

Use Pole Display — Indicates a pole display is physically attached to the defined terminal. Select the type of pole display from the drop-down list. **Required Options:** You must select a ‘Type’ and a ‘Port’ for this option.

Type — Indicates the standard types of pole displays we support. **Required Option:** You must select ‘Use Pole Display’ to enable this option.

Port — Specifies the physical port where the pole display connects to the terminal. **Required Option:** You must select ‘Use Pole Display’ to enable this option.
**OPOS** — Indicates the name of the OPOS driver file as it appears in the Registry Editor (Note: You must install the driver files first.) For example, the OPOS name for a Panasonic Pole Display would be JS-9000LD. To determine the OPOS name, access a DOS command line, type REGEDIT and press Enter. The Registry Editor appears. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and LineDisplay. The installed drivers display under LineDisplay. Determine the name of the driver file to be used and enter it into the ‘OPOS’ text box. This option has a maximum value of 30. **Required Option:** You must select ‘Use Pole Display’ to enable this option.

**Coin Changer Group Box**

Use the Coin Changer group box to connect a coin changer to this terminal and define other settings.

**Type** — Defines the comparable type of coin changer attached to the terminal.

**Port** — Specifies the physical port where the coin changer connects to the terminal.

**Aloha Spy Server Group Box**

The Aloha Spy Server group box allows you to connect to a security camera system. The Aloha system has the capability of interfacing with the TVS security system. You must define the TVS environment on the file server before you specify Aloha Spy parameters. **Required Option:** You must select ‘Use Aloha Spy’ in Maintenance > Store Settings > Security > POS Security tab.

Refer to the Aloha Spy Feature Focus Guide for more information on configuring and using the Aloha Spy feature.

**Port** — Indicates the TCP port value, which is the same value established for the TVS security system on the file server. This option has a maximum value of 65535.

**IP** — Indicates the IP address or the name of the computer used as the file server. This option has a maximum of 150 characters.
PIN Pad Group Box

Use the PIN Pad group box to configure the system to use a keypad for accepting a PIN number, as entered by the customer. This type of keypad works in conjunction with debit cards.

Type — Identifies the specific type of PIN pad equipment attached to the terminal. Currently, the Aloha system supports the Verifone 1000, Everest, and Everest Plus. Everest and Everest Plus use the same emulation; therefore, they are not listed as separate devices. Select either Verifone 1000 or Verifone Everest.

Port — Defines the physical port where the PIN pad connects to the terminal. Required Option: This option is unavailable unless you select a specific PIN pad type.

Token Dispenser Group Box

Use the Token Dispenser group box to configure the system to use a token dispenser machine to dispense tokens to the guest, based on the amount of purchase.

Type — Identifies the specific type of hardware used to dispense tokens to guests.

Port — Defines the physical port where the token dispenser connects to the terminal.

Fiscal Manager Group Box

Use the Fiscal Manager group box to connect to a fiscal printer, which contains its own computer chip, memory, and processor. Fiscal printers are used primarily in International markets.

Port — Defines the physical port where the fiscal printer connects to the terminal.

IP — Defines the IP address the fiscal printer uses to connect.
Order Numbering Group Box

Use the Order Numbering group box to indicate at what point you want to assign an order number to an order. This function makes it possible to use ‘serpentine’ drive-through order queues with separate cashier and pickup windows. In this arrangement, drivers place orders in a side-by-side configuration. Drivers with simple orders, or orders with few items, can move ahead in the line when other drivers are placing large or complicated orders. **Required Option:** You must clear ‘Use Store Wide Order Numbering’ in Maintenance > Store Settings > Printing > Check Content 2 tab to use this option.

**At start of order (normal)** — Causes the system to assign a number to a new order when the first item is added to the order. Orders receive numbers in sequence as the first item appears on the order, regardless of the nature of the order.

**Delay until order is sent** — Causes the system to delay assigning a number to a new order until after the order is complete, and the order is actually sent to the kitchen for preparation.

Check Counter Group Box

Use the Check Counter group box to define an alternate prefix to use with the check counter feature.

**Terminal Prefix** — Specifies a prefix, up to 10 alpha-numeric characters, to use for the terminal when you are using the perpetual check counter. The prefix prints before the terminal ID on each check generated from this terminal. **Required Option:** You must select ‘Print Check Counter’ in Maintenance > Store Settings > International group > Check Counter tab to enable this option.
Cash Drawers

Cash drawers are devices that contain various forms of payment tenders, such as monies, checks, coupons, vouchers, and other payment methods. Cash drawers usually have removable money trays with multiple compartments, to keep the cash drawer organized.

There are different types of cash drawers; for example, a ‘compulsory,’ cash drawer warns you when the drawer is open and requires the drawer to be closed before you can enter the next order.

Cash drawers connect to a computer workstation (i.e., order entry terminal) through a serial port, a parallel port, or through an interface port of a receipt printer.

When the system accesses a cash drawer, it sends a signal to the assigned cash drawer in one of two ways:

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

Select Maintenance > Hardware > Cash Drawers to display the Cash Drawers function.

![Figure 7-5 Cash Drawers Function](image-url)
**Drawer ID** — Indicates the unique, three-digit number that identifies the cash drawer record. The cash drawer number, combined with the ‘Name,’ creates a unique ID for each cash drawer record in the system. This option has a value range of 1 to 999. To create a new record, type an unused number and press Enter. To edit an existing record, scroll through the ‘Drawer ID’ drop-down list, select the record to edit and press Enter.

**Description** — Defines a descriptive name for the cash drawer. Cash drawer naming conventions are set by the user, however, we recommend the cash drawer name reflect its physical location, such as Bar 1, Pantry, Patio, or Dining. This option has a maximum of 15 characters.

**Drawer Type** — Designates the type of cash drawer you are using. If the type of cash drawer you currently use does not appear in the drop-down list, contact Technical Support for help with selecting an appropriate cash drawer type.

**Public Cash Drawer** — Allows all employees with cash drawer capabilities to access the drawer, if they do not have transactions with another drawer. You must make the drawer public in the FOH as part of your daily cash drawer assignments. **Required Option:** You must select ‘Cash Drawer’ in Maintenance > Labor > Job Codes > Job Codes tab for employees who need access to cash drawers. **Related Option:** To prevent an employee from using a public cash drawer in another revenue center, if the employee already has transactions in a different revenue center, select ‘Limit Public Cash Drawers to Revenue Center’ in Maintenance > Store Settings > Security > Cash Drawer tab.

Refer to the Public Cash Drawers Feature Focus Guide for more information on configuring and using public cash drawers.

**Drawer Checkout Group Box**

Use the Drawer Checkout group box to require the drawer to perform a reconciliation process and the number of reconciliation attempts before a manager is required to intervene.

Refer to the Drawer Reconciliation Feature Focus Guide for more information on configuring and using the Drawer Reconciliation feature.
Perform drawer reconciliation — Configures the cash drawer as a drawer for which you must reconcile all tenders at checkout. When you run a checkout for the drawer, you receive the prompt, “Would you like to reset the drawer totals?” Responding with a “Yes” invokes the Drawer Reconciliation process.

# of Attempts — Defines the number of reconciliation attempts allowed for the drawer before a manager, or employee with sufficient access, is required.

**Coupon Audit Group Box**

Use the Coupon Audit group box to define coupon reconciliation by cash drawer, and the number of reconciliation attempts before a manager is required to intervene.

Audit selected coupons — Specifies the employee assigned to the cash drawer must perform a coupon audit count at checkout for all qualifying coupons. Related Option: You must select ‘Audit Count at Checkout’ in Maintenance > Payments > Promotions > Promotion tab > Coupon Type Specifics to qualify a coupon for audit count.

# of Attempts — Defines the number of reconciliation attempts allowed for the coupon count before a manager, or employee with sufficient access, is required.

**Printer Interface Group Box**

Use the Printer Interface group box to connect a printer to the cash drawer. Required Option: You must select Printer Interface as the ‘Drawer Type’ to enable this option.

Printer — Specifies the printer to which the cash drawer is connected.

Drawer Number — Determines the connection order number of the cash drawer device. The value for the first connected drawer is 1, and the value for the second connected drawer is 2. You can connect up to two drawers to any one printer. This option has a maximum value of 9.

**Other Interfaces Group Box**

Use the Other Interfaces group box to interface with another terminal.

Terminal — Defines the terminal number to which the cash drawer is connected. This selection is only active when a non-printer interface cash drawer type is selected. Required Option: This option is unavailable when the ‘Drawer Type’ is Printer Interface.
**Port** — Specifies the physical port where the cash drawer connects to the terminal. *Required Option:* This option is unavailable unless the ‘Drawer Type’ is Non-Printer Interface.

**OPOS** — Indicates the name of the OPOS cash drawer file as it appears in the Registry Editor. (Note: You must install the driver files first.) For example, the OPOS name for a Panasonic cash drawer could be either JD-9000CD1 or JD-9000CD2. To determine this, access a DOS command line, type REGEDIT and press Enter. The Registry Editor appears. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and CashDrawer. The installed drivers appear under CashDrawer. This option has a maximum of 30 characters. This option is unavailable unless the ‘Drawer Type’ is OPOS Cash Drawer.

**Serial Interface Group Box**

Use the Serial Interface group box to define the cash drawer to use a certain pin configuration for compulsory drawer method.

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If using CTS or RI and a drawer is not attached to the selected port, or if the drawer does not support this method, the system will not allow cashiers to input an order or make a no sale.

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**Compulsory Method** — This option is unavailable unless the ‘Drawer Type’ is Serial 223 32000. Select CTS to indicate the method uses a CTS (Clear to Send method using pin 8 for a 9-pin serial port, and pin 5 for a 25-pin serial port. Select RI to indicate the method uses an RI (Ring Indicator) method using pin 9 for a 9-pin serial port and pin 22 for a 25-pin serial port.
Printers

Use the Printers function to set up all receipt and remote (kitchen printers). Use the Printers function to define the physical connections between terminals and printing devices. Each printer must connect to a terminal and should have an assigned backup printer to use in the event of hardware failure. After you define the printer, you must group them together logically in Maintenance > Hardware > Printer Groups, for use by other components of the Aloha system.

Select Maintenance > Hardware > Printers to display the Printers function tab. The Printers function tab provides the following tabs: Setup and Options.

**Number** — Indicates the unique, three-digit number that identifies the printer record. This option has a maximum value of 999. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ‘Number’ drop-down list, select the record to edit and press Enter.

**Setup Tab**

Use the Setup tab to configure the printer to take maximum advantage of the features and flexibility built into the printer. Select the Setup tab from the Printers function.

![Figure 7-6 Printers - Setup Tab](image)
Name — Defines a descriptive name for the printer. Printer naming conventions are set by the user, however, we suggest the printer name be descriptive or reflect its physical location, such as Kitchen, Pantry, Patio, or Dining. This option has a maximum of 25 characters.

Terminal — Indicates the terminal to which the print is physically connected.

Port — Specifies the serial and RT Card ports where the defined printer connects to the terminal. This setting must reflect the hardware configuration.

Backup — Defines a substitute printer for the defined printer in the event of hardware failure. **Related Option:** When the defined printer fails, the system reroutes output to the backup printer. To define the time to reroute a printer, type the number of seconds in ‘Reroute Timeout’ in Maintenance > Hardware > Terminals > Options tab.

Type — Designates the type of printer you are using. The drop-down list contains a list of the typical printers that work with Aloha.

For all slip printers, define the ‘Prefix Lines’ and ‘Lines Per Sheet’ in Store Settings > Printing Group > Check Style; otherwise only one line at a time prints and feeds the paper until it runs out.

OPOS Name — Specifies the name of the OPOS printer driver file as it appears in the registry editor (Note: You must install the driver files first.). To determine how the name appears in the registry editor, access a DOS command line, type REGEDIT and press Enter. The registry editor appears. Click the + sign to the left of HKEY_LOCAL_MACHINE. Continue to click the + sign to the left of SOFTWARE, OLEforRetail, ServiceOPOS, and MSR. The installed drivers appear under MSR. This option has a maximum value of 30 characters. **Required Option:** You must select ‘OPOS’ from the ‘Type’ drop-down list to enable this option.

Windows Printer Name — Enables any item that prints in the FOH to also print to a printer previously set up in the Microsoft® Windows® operating system. This text box is used to link an Aloha printer definition to a Windows Printer definition. It is very important that the printer name for this option match the printer name assigned in Windows under Start > Settings > Printers and Faxes. For Windows 95 (all printers) and Windows NT® (local printers), you must enter the printer name here as it is entered under Printers in Windows. For example: If the Windows printer is called HP LaserJet Plus, then the ‘Windows Printer Name’ text box must contain HP LaserJet Plus. On Windows NT systems (network printers), the printer name includes the server name. In this case, the ‘Windows Printer Name’ text box must contain the path. For example, if the printer name on an NT system is HP LaserJet Plus on Server01, the text box should say
Required Option: You must select ‘Windows Printer’ from the ‘Type’ drop-down list to enable this option.

Windows Printer Type — Specifies the type of printer currently selected as a Windows Printer in the operating system. Windows printers are typically connected to the Aloha network, but are not part of a printer group and do not function as a normal part of the Aloha system. **Required Option:** You must select ‘Windows Printer’ from the ‘Type’ drop-down list to enable this option.

Send Non-Checks To — Establishes the printer to which non-check print jobs are sent. Print jobs of this nature might include reports generated from an order entry terminal. This option is generally used with a slip printer; however, any printer can send non-checks to another printer.

Preloaded Logo — Utilizes preloaded logos stored in non-volatile RAM (NVRAM) in certain models of printers. To determine the logo to use, consult the literature received with the printer or consult the printer manufacturer. **Required Option:** You must select ‘Epson TM-80’ from the ‘Type’ drop-down list to enable this option.

Code Page — Associates the printer to a set of character codes for another language on Epson printers. We currently support the Euro (prints the Euro monetary symbol) and Cyrillic (Russian) character sets. **Required Option:** The ‘Code Page’ text box specifies the character set for the printer, but you must also specify the character set for the terminal. To specify the character set for the terminal, select Start > Settings > Control Panel and double-click Regional Options. Select the language setting for the system.

Use the following table to determine the settings for the corresponding language:

<table>
<thead>
<tr>
<th>Supported Code Page</th>
<th>Printer Setting</th>
<th>Terminal Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Euro</td>
<td>858</td>
<td>Western Europe and U.S. (default)</td>
</tr>
<tr>
<td>Cyrillic (Russian)</td>
<td>866</td>
<td>Cyrillic</td>
</tr>
</tbody>
</table>

Port — Specifies the port to use for a fiscal printer. **Required Option:** You must select ‘Fiscal Manager’ from the ‘Type’ drop-down list to enable this option.

IP — Specifies the IP address to use for a fiscal printer. **Required Option:** You must select ‘Fiscal Manager’ from the ‘Type’ drop-down list to enable this option.
**Settings** — Displays a secondary dialog box that enables you to define margin, column, and font settings. Press Tab to move to the next option. Make all desired changes, then click Save to save the changes. A Select Font dialog box is also available when you use a Windows printer. The Select Font dialog box enables you to define the font, font style, and font size. To make changes, scroll through the selection lists and highlight the desired font, font style, and font size. When finished, click OK. **Required Option:** You must select ‘Windows Printer Name’ from the ‘Type’ drop-down list to enable this option.

**Options Tab**

Use the Options tab to configure settings that relate more to the restaurant environment, such as transfer and timeout functions. Select the Options tab from the Printers function.

**In Kitchen** — Items routed to a printer group containing a printer that has ‘In Kitchen’ selected also print at the expediter printer. **Required Option:** You must specify the expediter printer in Maintenance > Store Settings > Printing Chits > Chit Style tab. Using this method, only orders that are ‘split’ to multiple printer groups print to the expediter printer for quality control. This method eliminates the need to include the expediter printer in printer groups.
**Reroute Timeout** — Defines the amount of time, in seconds, that the system will wait before rerouting the print job from the defined printer to the backup printer, as defined on the Settings tab. This option has a value range of 0 to 65535.

**Beeps** — Sets the number of audible signals emitted by the printer each time a chit is printed. This feature is only available on some printer models. Some printers use an annunciator connected to the cash drawer port on the printer to create the beep sounds. Consult the manufacturer of your printer for more information. This option has a value range of 0 to 99.

In all cases, the beeps are activated by the same signal that opens a cash drawer. If a cash drawer is attached to the printer, verify this option is set to ‘0’ to prevent the cash drawer from opening each time you print a chit.

**# Guest Checks** — Defines the number of guest checks to print. This option has a value range of 1 to 99.

**Chit Printing Group Box**

Use the Chit Printing group box to define the contents of the chit, as to what to include or to exclude. These settings provide considerable flexibility in designing a chit that contains information necessary for your business, but excludes unnecessary information.

**Print item prices** — Causes the system to print item prices on the chit.

**Print order total** — Causes the system to print the order total on the chit.

**Print terminal name** — Causes the system to print on the chit, the name by which the order terminal is identified in the system.

**Never print delivery/carryout information** — Prevents the system from printing delivery or carryout information on the chit.

**Never print seat information** — Prevents the system from printing seat information on the chit.
Always sort by seat number — Causes the system to sort chit information by seat number, when seat numbering is in use.

*****Seat 1*****
Steak
Salad
*****Seat 2*****
Fish
Salad
Printer Groups

Use the Printer Groups feature to combine printers into logical groups after they are defined in Maintenance > Hardware > Printers. Most components of Aloha Manager use printer groups instead of individual printers to add flexibility to the system.

Printer groups are a powerful feature of Aloha Manager. You can handle virtually any printing situation by assigning certain records, such as menu items, or payment tenders, to a dedicated printer group, and reroute those printer groups, when necessary, without having to reroute each record, individually.

You assign one or more printers to a printer group, then assign the printer group to an Aloha Manager database record, such as a menu item. Later, when a server orders the item on the FOH terminal, the item prints to all printers in the specified printer group.

For example, four separate printer groups are defined for Mike’s Restaurant. The bar printer is assigned to printer group 1, the fry printer is assigned to printer group 2, the grill printer is assigned to printer group 3, and the cold station printer is assigned to printer group 4.

The server places an order for the following items:

- Corona Beer
- Chicken Platter w/Fries
- Cheesecake

When the above items were initially added to the Aloha Manager database, the database administrator assigned printer group 1 to the Corona, printer group 2 to the Chicken Platter, printer group 3 to the Fries, and printer group 4 to the Cheesecake.
So, when the server places the order, the Corona routes to printer group 1 (Bar Printer), the Chicken Platter routes to printer group 2 (Grill Printer), the fries route to printer group 3 (Fry Printer), and the cheesecake routes to printer group 4 (Cold Station Printer). This way, each item routes to the appropriate station, for preparation.

If you decide to send the fry cook home early, you can reroute printer group 3 (fry printer) to printer group 2 (grill printer), so the grill cook knows to also prepare the fries, as well as any other item that normally prints to printer group 3. You can also reroute printer groups manually, or automatically through the use of scheduled events.
Select Maintenance > Hardware > Printer Groups to display the Printer Groups function.

**Figure 7-9** Printer Groups Function Tab

**Group ID** — Indicates the unique, three-digit number that identifies the printer group record. The printer group number, combined with the Name, creates a unique ID for each printer group record in the system. This option has a maximum value of 999.

**Name** — Defines a descriptive name for the printer group. We recommend you use a name descriptive of the printer group’s purpose (e.g., Kitchen, Counter, Drive-thru). This option has a maximum value of 40 characters.

**Printers** — Designates the printer to include in the printer group. Each printer group has a maximum of five assigned printers. If you need to add or modify a printer, click Printer to access the Printer function.
Labels

An important feature of any take-out or delivery restaurant is the ability to know what is in a container without opening it. Use the Label feature to set up and print labels for containers. You must define at least one label, and you must add a label ID to any item that requires a printed label.

Select Maintenance > Hardware > Labels to display the Labels function.

**Figure 7-10** Labels Function Tab

**Label ID** — Indicates the unique, two-digit number that identifies the label record. The label, combined with the ‘Name,’ creates a unique ID for each label record in the system. This option has a maximum value of 99. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ‘Label ID’ drop-down list, select the record to edit and press Enter.

**Label Name** — Defines a descriptive name for the label. You can determine your own label naming conventions. This option has a maximum of 25 characters.

**Printer Group ID** — Defines the locations where the label prints. If you need to add or modify a printer group, click Printer Group ID to access the Printer Group function.
Text Size — Defines the default text size printed on the label.

Label Type Group Box

Use the Label Type group box to specify the type of label to print.

Item — Prints a label that contains information about the item in the intended container. **Related Options:** If you select ‘Print Barcode?’ in the Print Options group box, the label prints with a barcode that, when scanned, returns information about the item. The system only prints labels for items assigned to a specific label. If more than one item is included in the container, a label prints for each item in the order. Item information on the label is then used to ring up the item, but no guest check information is conveyed by the label.

Guest Check — Prints a label that contains guest check information about the item or items in the intended container. **Related Options:** 1) If you select ‘Print Barcode?’ in the Print Options group box, the label prints with a barcode that, when scanned, returns information that is used with the Get Check function to pull up the check for the customer. The check can then be closed if the guest is in the store, or it can be transferred to a driver for delivery. 2) If you select ‘Guest Check,’ it is not possible to assign the label to a menu item. If the selected label is subsequently changed to ‘Guest Check,’ prior label assignments to menu items involving the label become invalid.

Print Options Group Box

Use the Print Options group box to specify the contents of the label.

Print Barcode? — Enables barcode printing on the label. When scanned, the barcode causes the system to display information about the item or the full guest check, depending upon the setting in the ‘Label Type’ group box.

Print Item Price? — Prints the item price on the label. **Required Option:** You must select ‘Item’ in the Label Type group box to enable this option.

Print Name? — Prints a customer name on the label.

Print Address? — Prints a customer address on the label.
Print Area Group Box

Use the Print Area group box to specify the size label you are using, and the margin to reserve on the label.

**Label Width** — Defines the width of the label. The label manufacturer provides this information. This option has a maximum of 10 digits; four digits can appear to the right of the decimal.

**Label Height** — Defines the height of the label. The label manufacturer provides this information. This option has a maximum of 10 digits; four digits can appear to the right of the decimal.

**Margin** — Defines the desired width of the label margins. The label manufacturer provides this information. This option has a maximum of 10 digits; four digits can appear to the right of the decimal.

Filter by Order Mode Group Box

Use the Filter by Order Mode group box to specify the order modes that cause labels to print.

**Print Label for ALL Order Modes** — Prints a label for all order modes. If this check box is selected, the order mode drop-down lists are not available.

**Order Modes #1 through #4** — Causes a label to print for any order mode you select from the drop-down lists. If you need to add or modify an order mode, click Order Mode #1 through #4 to access the Order Mode function. **Required Options:** 1) You must select ‘Print Label for ALL Order Modes’ to enable this option. 2) You must also specify the type of label to print for the item when it is ordered using the ‘Label ID’ drop-down list in Maintenance > Menu > Items > Miscellaneous tab.
Use the Video Groups function for routing video signals to display devices located in specific areas of the restaurant as a group. Select Maintenance > Hardware > Video Groups to display the Video Groups function.

Refer to the Interfacing Video Display Systems with Aloha User Guide for complete information on configuring and using a video system.

**Number** — Indicates the unique, three-digit number that identifies the video group record. The video group number, combined with the ‘Name,’ creates a unique ID for each video group record in the system. This option has a maximum value of 999.

**Name** — Defines a descriptive name for the video group. We recommend you use a name descriptive of the video group’s purpose (e.g., Kitchen, Counter, Drive-thru). This option has a maximum of 40 characters.

**Video Queues** — Enables you to select up to five video display devices to which the video signal may be routed.

*Figure 7-11  Video Groups Function Tab*
Video Queues

Use Video Queues to define where orders display on video screens for preparation. You can configure such things as the display method for video queues and if the video queue uses load balancing.

Refer to the Interfacing Video Display Systems with Aloha User Guide for complete information on configuring and using video.

Select Maintenance > Hardware > Video Queues to display the Video Queues function. The Video Queues function tab provides the following tabs: General and Setup.

**Number** — Indicates the unique, three-digit number that identifies the video queue record. The video queue number, combined with the Name, create a unique ID for each video queue record in the system. This option has a maximum value of 999.
General Tab

Use the General tab to name the video queue and configure such things as the display method, if the video cell can be bumped if the check is closed, and certain check attributes to display in the cell. Select the General tab from the Video Queues function.

**Figure 7-12** Video Queues - General Tab

**Name** — Defines a descriptive name for the video queue. Video queue naming conventions are set by the user. This option has a maximum of 20 characters.
**Display Method** — Determines when the items display on the video monitor once employees enter the order. The three choices are:

- **Display Items as Entered** enables each item to be sent to the video screen within five seconds after it is entered on the order screen. Use this method when you want orders to reach the food preparation staff as soon as possible. Items are not yet finalized (see Display When Finalized below) and may be deleted or changed.

- **Display One Behind** enables items to be sent to the video screen as soon as the next item is entered. Items are also displayed within seconds after being entered on the order screen. The last item on an order is not sent to the video screen until the order is finalized. Using this method may eliminate receiving premature information about an item being ordered, taking into account last moment changes to an item’s modifiers.

- **Display Order When Finalized** enables all items on an order to be sent only when the order is finalized. Orders are finalized if all the items are ordered and sent to the kitchen (in TableService), the order is closed (in both TableService and QuickService), the order is totaled (in QuickService), or the user navigates away from the order screen (in QuickService). A finalized order is an order that has been sent to the kitchen for preparation.

**Display Default Order Mode** — Displays the default order mode on the video as you are entering the items on the guest check, if you are using the ‘Display Items as Ordered’, or the ‘Display One Behind’ options as your display method. **Related Option:** In QuickService, you define the default order mode in Maintenance > System > Terminals or Maintenance > System > Order Entry Queue.

**Display Check Total in Video Cell** — Enables you to display the total of the check in video cells.

**Display Check Paid/Unpaid Status in Video Cell** — Displays ‘Check Paid’ or ‘Check Unpaid’ on the bottom line of the video cell, depending on the state of the check. Related Option: If you select this option in conjunction with ‘Display Check Total in Video Cell,’ the text displays ‘Paid’ and ‘Unpaid.’

**Cannot Bump from Video Devices until Check Closed** — Restricts the bumping of open checks from video screens.

**Display Add-On Items in Original Cell** — Displays add-on items in the same cell with the initial items of the order. The ‘Add-On’ header appears in the cell to separate the occurrences of the order.
Setup Tab

Use the Setup tab to set up the video queue to use load balancing, which attempts to distribute the orders among the video devices, or use the standard setting. For example, if you send hamburgers to Queue 1 and Queue 1 can display on Device 1, Device 2, and Device 3, then when Device 1 fills up, the next order displays on Device 2. In turn, when Device 2 fills up, the next order displays on Device 3, and so on.

Select the Setup tab from the Video Queues function.

![Figure 7-13 Video Queues - Setup Tab](image)

**Standard Video Queue Group Box**

Use the Standard Video Queue group box to define the queue for standard video operations, as opposed to a load balancing queue.

**Standard Video Queue** — Indicates a standard video queue set up for the device and keypad. **Required Option:** You must clear ‘Load Balancing Queue’ to enable these options.

**Video Device** — Specifies the video device to display for the queue. Select up to five devices. Click Video Device to add another video device, if necessary.
**Video Keypad** — Specifies the video keypad to use for the corresponding video device. Select up to five keypads. Click Video Keypad to add another video keypad, if necessary.

**Split Screen** — Indicates how you want different order queues to appear on the same video screen (either top and bottom, or left and right). This option works in conjunction with the ‘Cell Layout’ section of the Video Controller function. **Required Option:** You must clear ‘Load Balancing Queue’ to enable these options.

- Select None to disable the split screen feature.
- Select Top to indicate the queue displays on the top of the screen.
- Select Bottom to indicate the queue displays on the bottom of the screen.
- Select Left to indicate the queue displays on the left side of the screen.
- Select Right to indicate the queue displays on the right side of the screen.

---

**Be aware that the system disables the split screen feature when mixing a top or bottom video queue with a left or right video queue, and creates an error in Verify.txt until you correct the configuration.**

**Starts Timer** — Enables the video to start order delay timers. Any monitor that has an item with a specified delay time routed to it must activate this option. **Required Option:** You must clear ‘Load Balancing Queue’ to enable these options.

**Bump All Orders** — Enables the dispatcher to bump all instances of an order from all monitors, indicating its completion. When orders are bumped from the ‘master’ monitor, they are bumped from all video screens. **Required Option:** You must clear ‘Load Balancing Queue’ to enable these options.

**Bump to Video Group** — Determines the video group to which to bump orders. Select the video group from the drop-down list. **Required Option:** You must clear ‘Load Balancing Queue’ to enable these options.

**Load Balancing Queue Group Box**

Use the Load Balancing Queue group box to define the queue for load balancing and distributing orders to multiple queues, based on the queue load.
**Load Balancing Queue** — Indicates a video queue that automatically distributes orders to multiple queues, based on individual queue load. **Required Option:** You must clear ‘Standard Video Queue’ to enable these options.

**Queue 1 through Queue 5** — Indicates the specific queue to use for load balancing. You can define up to five video queues; however, you cannot select a specific queue more than once. **Required Option:** You must clear ‘Standard Video Queue’ to enable these options.

**Method Group Box**

Use the Method group box to determine the type of method to use to distribute orders to multiple queues, based on the individual queue load. **Required Option:** You must clear ‘Standard Video Queue’ to enable these options.

**By Number of Orders** — Distributes the orders to the queues based on the number of orders.

**By Number of Items** — Distributes the orders to the queues based on the number of items.

**Summary Cell Settings Group Box**

The Summary Cell Settings group box determines the type of items that display in the summary cell.

**Show Menu Items** — Displays menu items in the Summary cell.

**Show Tracking Items** — Enables you to display only those menu items defined in Aloha Quick Count, in a summary cell that shows tracking items. **Related Option:** Only items set up as tracking items show in the summary cell, unless you select the ‘Show on Tracking Summary’ option for an item.
Video Devices

Use the Video Devices function to set up and define the video devices used in the food preparation areas. The system supports cell layouts that have cells of the same size or variable cell lengths. You define the number of rows and columns, and include an ending summary cell as the last cell. The system also supports the display of two video queues on the same monitor.

When using variable cell lengths, the system generates a vertical line to separate each column. A blank line that acts as a separator between orders follows each order. The system numbers cells vertically and reserves space on the last order cell for the scroll indicators, the summary cell, and each cell heading. The system also begins with a complete order starting at the top of the left column. When the screen is full and there is not enough room to display an entire order, the system shows a partial order with the header, the first item, the ‘continued’ indicator, and the scroll indicator. You can bump an order that is currently visible on the screen, including partial orders, but you cannot bump hidden orders that are not visible on the screen.

This capability is available to you by purchasing a license for video display systems, an add-on to the Aloha system. This package gives you instant access to adding and configuring video display devices to make your operations more flexible to you, and more attractive to the customer.

Refer to the Interfacing Video Display Systems with Aloha User Guide for complete information on configuring and using video.
Select Maintenance > Hardware > Video Devices to display the Video Devices function.

![Figure 7-14 Video Devices Function Tab](image)

**Number** — Indicates the unique, three-digit number that identifies the video device record. The video device number, combined with the ‘Name,’ creates a unique ID for each video device record in the system. This option has a maximum value of 999.

**Name** — Defines a descriptive name for the video device. Video device naming conventions are set by the user. This option has a maximum of 20 characters.

**Video Device Type** — Designates the type of video you are using. The drop-down list contains a list of the video devices supported by Aloha.

**Hardware ID** — Indicates the hardware ID number associated with the device. This option has a maximum value of 999.

**Use Touch Screen** — Activates the touch screen for the selected device. This option is unavailable when the video controller type is Progressive.
Cell Layout Group Box

Use the Cell Layout group box to define the number of rows and columns of the video screen, as well as the use of a summary cell.

**Variable Cell Length** — Displays the video cells using variable lengths according to the number of items in the order. If cleared, all video cells display with the same length in a uniform manner.

**Rows** — Determines the number of rows to appear on the video monitor. Rows are not supported with the variable cell length feature. This option is unavailable when the video controller type is Progressive.

**Columns** — Determines the number of columns to appear on the video monitor. This option has a value range of 1 to 8. This option is unavailable when video controller type is Progressive.

**Summary** — Indicates the number of cells the Summary screen covers when it is activated. The Summary screen accumulates orders in finalized mode and displays how many of each item needs to be made. The Summary screen can be turned on and off as needed. This option is unavailable when the video controller type is Progressive. This option has a maximum value of 999.

Window Position Group Box

Use the Window Position group box to define the top and left coordinates for the window display, and the width and height of the cells.

**Top** — Indicates the starting ‘Y’ coordinate for the top, left corner of the window display. This option has a maximum value of 999; however, the default is 0 pixels.

**Left** — Indicates the starting ‘X’ coordinate for the top, left corner of the window display. This option has a maximum value of 999; however, the default is 0 pixels.

**Width** — Indicates the width of the window display. This option has a maximum value of 999; however, the default is 640 pixels.

**Height** — Indicates the height of the window display. This option has a maximum value of 999; however, the default is 480 pixels.
Video Keypads

Use the Video Keypads function to designate the ASCII or keyboard character used to perform the corresponding function. When you select a video device type, the Keypad tab populates with the default settings for the physical bump bar; however, newer bump bar devices may require you to alter those configurations.

For example, if the ‘Bump Cell Left’ drop-down list populates with the letter ‘L,’ but the physical bump bar uses ‘<,’ change L to <. To bump to the left on the video screen, press <, located on the bump bar.

![Sample Layout for Bump Bar Device](image)

*Figure 7-15 Sample Layout for Bump Bar Device*

Keypads are supported in conjunction with split-screen operation. With video keypads installed on your system, you can easily visualize the status of orders in different parts of the restaurant, and quickly bump them from one queue to another to speed up the process of order preparation.

Refer to the Interfacing Video Display Systems with Aloha User Guide for complete information on configuring and using video.
Select Maintenance > Hardware > Video Keypads to display the Video Keypads function.

**Figure 7-16  Video Keypads Function Tab**

**Number** — Indicates the unique number that identifies the keypad. This option has a maximum value of 999.

**Name** — Holds the descriptive name for the keypad.

**Video Device Type** — Designates the type of video device you are using. The drop-down list contains a list of the video devices supported by Aloha.

**Hardware ID** — Indicates the hardware ID number associated with the device. This option has a maximum value of 999.

**Keypad Layout Group Box**

Use the Keypad Layout group box to define the characters and actions of the keypad. When you define a video device type, the system populates each option with the default selection.

**Bump 1st Cell through 8th Cell** — Indicates the keypad characters you want to use to represent the bump 1st cell through 8th cell commands.
**Scroll Cell Left** — Indicates the keypad character you want to use to represent the ‘scroll left’ command.

**Scroll Cell Right** — Indicates the keypad character you want to use to represent the ‘scroll right’ command.

**Recall Last Order** — Indicates the keypad character you want to use to represent the ‘recall last order’ command.

**Summary On/Off** — Indicates the keypad character you want to use to represent the ‘summary on’ and ‘summary off’ commands.

**Refresh Display** — Indicates the keypad character you want to use to represent the ‘refresh display’ command.

**Toggle Queue** — Indicates the keypad character you want to represent the ‘toggle queue’ command, which toggles the view back and forth, between queues.

**Toggle Split Screen** — Indicates the keypad character you want to use to represent the ‘toggle split screen’ command.

**Toggle Queue On/Off** — Indicates the keypad character you want to use to represent the ‘toggle queue on’ and ‘toggle queue off’ commands.
Display Boards

A display board is a physical stand from which the guest places their order. It is commonly used in drive thru environments and provides a visual representation of a guest order, including any modifications to the order, and the total purchase. The board shows what is being ordered and allows the guest to catch any errors before the order is sent to the kitchen.

The Aloha system supports Texas Digital Order Confirmation boards. Other confirmation board companies interface with Aloha by emulating the Texas Digital format. The system also supports the Everbrite board using a Texas Digital interface. Everbrite allows pop up graphics to display based on what is ordered. Rather than the Aloha system writing directly to the display board, the message is sent to Everbrite to acquire the appropriate images to display. Refer to the Everbrite LCD/OCS Communication Protocol documentation.

Most display boards show a continually scrolling greeting message. When an employee begins taking an order, the Aloha FOH determines if a display is currently active. If so, it writes to the display when an item is rung up. Items removed from the order are also removed from the display board. This enables the customer to see exactly what the kitchen thinks was ordered, providing them the opportunity to stop the order process if something appears to be incorrect.

The number of lines showing on the display board at one time depends upon the capabilities of the installed hardware. If the order has more lines to display than the capacity of the display board, only the most recent lines show up on the display board, up to the maximum number supported by the display board.

Most of the time, messages written to the display board are generated from the connected terminal, however, it is common to have two terminals operating during peak times, where one terminal captures the order, and the other terminal captures the payment. Then when business slows, one terminal is often shut down and the remaining terminal captures both the order and receives the payment.
Select Maintenance > Hardware > Display Boards to open the Display Boards function.

**Display Board ID** — Indicates the unique, two-digit number that identifies the display board record. This option has a maximum value of 99. **Related Requirements:** 1) To provide the ability to manually reroute the destination of orders to another display board from the FOH, add a Reroute Display Board button function to a FOH panel in Maintenance > Menu > Panel Editor. 2) To add the ability to display a ‘Your Total is...’ message for each order, add a Display Order Total button function to a panel or script in Maintenance > Menu > Panel Editor. 3) To enable the system to automatically activate a reroute at a certain time, create a Reroute Display Board event in Maintenance > System > Events.

---

**CAUTION**

You cannot connect more than one display board to a terminal.

---

To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ‘Display Board ID’ drop-down list, select the record to edit, and press Enter.
**Connected to Group Box**

Use the Connected to group box to determine the terminal and the port to which the display board is attached.

**Terminal ID** — Indicates the terminal to which the display board is attached.

**Port** — Indicates the port on the terminal to which the display board is physically attached. When active, the display board signal routes to the specified port.

**Displays Orders from Group Box**

Use the Displays Orders from group box to determine the terminal that is sending orders to the display board.

**Terminal ID** — Indicates the terminal that sends orders to this display board. *Required Option:* This option is unavailable unless the display type is AccuORDER360, AccuView, or Everbrite Custom.

**Scrolling Messages Group Box**

Use the Scrolling Messages group box to define the number of messages to scroll on the display board and the text for each message.

**Num messages to Scroll** — Specifies the number of scrolling messages to use. This option has a value range of zero to 3. If the number is zero, no scrolling messages are active and no scrolling message text boxes are available. If the number is three, all three scrolling message text boxes are available.

**Scroll message #1 through #3** — Specifies the message you want customers to read on the display board. This text box accepts up to 100 characters, but the message truncates at the end of the message board line. Verify the length of the message visually before you implement the message.

**Delay Time Group Box**

Use the Delay Time group box to specify the length of time to display the change due and amount tendered messages.
Change Due — Specifies how long to display the amount of change due a customer, on the display board. This time amount can be up to 255 seconds. **Required Option:** You must select PCD 101 as the display type to enable this option.

Amt Tendered — Specifies how long to display the amount of money received from the customer, on the display board. You can specify up to 255 seconds. **Required Option:** You must select PCD 101 as the display type to enable this option.

Other Options on the Display Board Function Tab

Greeting message — Specifies the desired greeting message to appear on the display board. This option has a maximum of 100 characters, but the message truncates at the end of the message board line. Verify the length of the message visually before using the message in a live environment. The greeting message displays on the display board until the first menu item is ordered. **Required Option:** You must select AccuORDER360 or AccuView as the display type to enable this option.

Display Type — Contains a list of the typical display boards encountered in an Aloha system environment. If the type of display board you are using does not appear in the drop-down list, contact Technical Support for help with selecting an appropriate display board type from the list. The Everbrite type is available for TableService only. Select None to disable the display board.

Is Display Active? — Activates the display board, and routes the display signal to the board.

Display Graphics? — Enables the use of graphics on the display board.

Consolidate Items? — Combines like items on the display board for consolidation.

Display Prices? — Displays the item price on the display board.

Hide Zero Tax — Suppresses the display of tax information when the value is zero.

Font — Defines the desired font for the display board.

Num Columns — Establishes the number of display units arranged in columns as installed in the display board. This number should be between zero and 255 and is available from the manufacturer.

Num Rows — Establishes the number of display units arranged in rows as installed in the display board. This number should be between zero and 255 and is available from the manufacturer.
Scales and Tares

Scales and tares work in conjunction with the Quantity Item Pricing feature and enable the Front-of-House (FOH) to sell items using a weighing scale. Tares refer to the weight deducted from the gross weight of goods to allow for the weight of the container. When you establish tares, the total price of the product is calculated based on the weight (less the tare weight) times the unit price.

There are several steps required to set up scales and tares for operating in the FOH. Before you can use scales, you must do the following:

- Define a Scale
- Define a Tare
- Associate Scale and Tare Information with an Item
- Define Manual Weight Options for Scales

Refer to the Scales and Tares Feature Focus Guide for more information on configuring and using scales and tares.
Scales

Use the Scales function to identify the scale you are using, port number, and if the weight appears on a pole display. Select Maintenance > Hardware > Scales > Scales to display the Scales function.

**Figure 7-18  Scales Function Tab**

**Scale ID** — Indicates the unique, four-digit number that identifies the scale record. The scale number, combined with the ‘Name,’ creates a unique ID for each printer record in the system. This option has a maximum value of 9999.

**Name** — Defines a descriptive name for the scale. Scale naming conventions are user-defined; however, we suggest the scale name be descriptive or reflect its physical location. This option has a maximum of 25 characters.

**Terminal** — Indicates the terminal to which the scale is connected. If you need to add or modify a terminal, click Terminal to access the Terminal function.

**Port** — Specifies the port where the defined scale is connected.

**Type** — Designates the type of scale you are using. The drop-down list contains a list of the scales supported by Aloha.
**Display Weight on Pole Display** — Displays the weight measurement from the scale on a pole display.

**Tares**

Use the Tares function to define the name and weight of the tare. Tares are a deduction made from the gross weight of goods to allow for the weight of the wrapper, box, or container they are in. When you define a tare, you are defining the weight of the container for the item. The weight of the container is excluded from the total weight before calculating the price. For example, an item for candy in a glass bowl requires a weighted tare, but an item for sliced meat on a paper napkin does not.

When using scales, the system requires you to associate a tare record for each item you want to weigh, however, not all items you sell have a tare. You must define a tare record for each weighted container, and define a ‘no tare’ record with a zero weight as a default tare to use when the weight of the container does not affect the total price.

Select Maintenance > Hardware > Scales > Tares to display the Tares function.

![Figure 7-19 Tares Function Tab](image)

**Tare ID** — Indicates the ID number of the tare.
**Name** — Denotes a descriptive name for the tare.

**Tare Weight** — Indicates the weight of the tare to deduct from the weighed amount of the item.
Cash Cards

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

Select Maintenance > Hardware > Cash Cards to display the Cash Cards function.

![Figure 7-20  Cash Cards Function Tab](image)

**Cash Card Device ID** — Indicates the unique, two-digit number that identifies the cash card device record. The cash card device number, combined with the ‘Name,’ creates a unique ID for each printer record in the system. This option has a value range 1 to 99.

**Name** — Defines a descriptive name for the cash card device. Cash card device naming conventions are user-defined, however, we suggest the printer name be descriptive or reflect its physical location, such as Kitchen, Pantry, Patio, or Dining. This option has a maximum of 10 characters.

**Terminal** — Indicates the terminal to which the cash card device is connected. If you need to add or modify a terminal, click Terminal to access the Terminal function.
**Port** — Specifies the port where the defined cash card device connects to the terminal.

**Type** — Designates the type of cash card device you are using. The drop-down list contains a list of the cash card devices that work with Aloha.
Drink Dispensers

Drink dispensers assure that every liquor drink poured is accounted for accurately. This eliminates the potential for employees to over pour or forget to ring up a drink. It may also help when identifying other shrink methods such as spillage. The following table shows the supported drink dispensers and their communication parameters:

<table>
<thead>
<tr>
<th>Drink Dispenser</th>
<th>Baud</th>
<th>Parity</th>
<th>Data Bits</th>
<th>Stop Bits</th>
<th>Cable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berg Liquor System</td>
<td>2400</td>
<td>Even</td>
<td>7</td>
<td>1</td>
<td>None</td>
</tr>
<tr>
<td>EasyBar Liquor System</td>
<td>9600</td>
<td>None</td>
<td>8</td>
<td>1</td>
<td>Straight through</td>
</tr>
</tbody>
</table>

Set up the drink dispenser according to the documentation included with it by its manufacturer. Remember that any drink dispenser ID (or PLU, as some companies may call them) must match an Item ID in the Aloha system. If it does not match, a message similar to ‘Item #### not found in database. Notify Manager’ appears.

Select Maintenance > Hardware > Drink Dispensers to display the Drink Dispensers function.

Figure 7-21 Drink Dispensers Function Tab
Dispenser ID — Indicates the unique, three-digit number that identifies the drink dispenser record. This option has a maximum value of 999.

Name — Defines a descriptive name for the drink dispenser. Drink dispenser naming conventions are user-defined; however, we suggest the drink dispenser name be descriptive or reflect its physical location. This option has a maximum of 25 characters.

Terminal — Indicates the terminal to which the drink dispenser is connected. If you need to add or modify a terminal, click Terminal to access the Terminal function.

Port — Specifies the port where the defined drink dispenser connects to the terminal.

Type — Designates the type of drink dispenser you are using. The drop-down list contains a list of the drink dispensers that work with Aloha.
Message Maintenance Functions

This chapter discusses the features available on the Messages menu. These are used to generate messages for communication with individual employees, the restaurant staff, or the guests.

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The Messages function enables you to create a variety of messages to display on hardware devices, such as order entry terminals and display poles. You can also define guest check messages from the Messages function. When you use this feature to its full potential, you can target your communications to specific areas of the restaurant, promote sales and special offerings, encourage employees in their daily tasks, and add a personal touch to your POS system. You can use the pre-programmed events available in Aloha POS, to make messages display or print in desired locations.

Refer to Events in the System chapter for more information regarding configuring and using events.

Select Maintenance > Messages to access the Messages menu.
Main Screen

Use the Main Screen Messages function to display messages on the FOH Login screen. If the terminal has an attached pole display, the message also appears on the pole display. Main screen messages are active by default; however, you can also activate main screen messages through scheduled events.

If you do not schedule an event to display a message, the first and second messages defined in the Messages function appear, by default, on the left and right sides of the order entry terminal login screen, respectively.

To schedule an event to display a message, select Maintenance > System > Events and use the following event types to specify the main screen messages to appear, as necessary:

- (11) Set Left Message
- (12) Set Right Message

Refer to Events in the System chapter for more information regarding configuring and using events.
Select Maintenance > Messages > Main Screen to display the Main Screen function.

**Figure 8-2 Main Screen Messages Function Tab**

**ID** — Indicates the three-digit number that, combined with the entry in the first message text box, uniquely identifies each record. To create a new record, enter an unused ID number and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record and press Enter.

**Message** — Designates the text to appear on the main screen of the order entry terminal or pole display. The entry in the first line serves as the identification name for the message. Use the additional lines for entering the message as you want it to appear on the main screen or pole display.

**Display on Pole** — Causes the main screen message to appear on a pole display, if one is attached to the FOH terminal. The main screen message continues to appear on the order entry terminal, as before.

Other important points to consider when you create a main screen message include:

- Only eight lines are available for message text.
- Each line is limited to 20 characters.
• If you use a Cool interface, the message has a maximum of 120 characters. You can arrange those 120 characters in any manner, on the eight available lines.
• The first and second messages automatically appear on the FOH terminal. You must set an event to display any other messages.
• By default, message ID 01 appears on the left side of the FOH terminal and message ID 02 appears on the right side.
• When you create a message for a pole display, leave a blank line between the lines of text so the message scrolls across the screen with a pausing effect, making the message easier for the customer to read. The main screen message always appears on top; however, unlike other types of messages in the system, you cannot target main screen messages to different areas of the restaurant, or to different job codes.
Guest Check

Use the Guest Check message function to customize the information that prints on the guest check and credit card vouchers. This feature enables the restaurant manager to communicate with the guest through messages and you can vary messages at different times and in different places within the restaurant. The first guest check message defined in the system prints by default; however, you can also activate guest check messages through scheduled events.

Refer to Events in the System chapter for more information regarding configuring and using events.

To schedule an event to print a guest check message, use one of the following event types:

- (16) Set Guest Check Message
- (31) Set Guest Check Footer Message by Terminal.

Select Maintenance > Messages > Guest Check to display the Guest Check function.

Figure 8-3  Guest Check Function Tab
**ID** — Indicates the five-digit number that, combined with Name, uniquely identifies each record. To create a new record, enter an unused number and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record to edit and press Enter.

**Name** — Specifies the description of the guest check message. The text entered in the ‘Name’ text box does not appear on the guest check.

**Title** — Specifies the text to print at the top of the guest check. Two lines are available, although it is not necessary to use both lines. The text in the ‘Title’ text boxes prints on the guest check exactly as typed. If you want the message centered, you must type the message to appear centered.

**Message** — Specifies the text that prints at the bottom of the guest check, to communicate directly with the guest. The message area is for sales messages and promotions, seasonal greetings, upcoming events, or any other desired message. The lines center automatically when the message prints on the guest check.
Clock In Information

Use the Clock In Information message function to create special messages that target individual employees or specific job codes. These messages appear on order entry terminals when employees clock in. The messages do not print. You can also configure if the message is used as break reminder to display when you clock in.

Select Maintenance > Messages > Clock In Information to display the Clock In Information function,

![Figure 8-4 Clock In Information Function Tab](image)

**ID** — Indicates the five-digit number that uniquely identifies each record. To create a new record, enter an unused ID and press Enter. To edit an existing record, scroll through the ID dropdown list, select the record to edit, and press Enter.

**Employee** — Indicates an individual employee as the target of the message. When you select an individual employee from the list, the message appears on the order entry terminal when the person clocks in. To direct the message to more than one employee, select None.
**Job Code** — Enables you to select a job code as the target of the message. When you select a job code from the list, the message appears on the order entry terminal when an employee who is assigned to that job code clocks in.

**Text** — Specifies the text to appear on the order entry terminal. Each line has a maximum of 30 characters. Type the message as you want it to appear on the order entry terminal.

**Meal Break Reminder** — Specifies the message is used as a meal break reminder. When attached to a job code, the message appears when the employee clocks in. **Required Option:** To attach the message, you must select a job code that allows ‘Allow Meal Period Breaks’ in Maintenance > Labor > Job Codes > Functions.

**Rest Break Reminder** — Specifies the message is used as a rest break reminder. When attached to a job code, the message appears when the employee clocks in. **Required Option:** To attach the message, you must select a job code that allows ‘Allow Rest Period Breaks’ in Maintenance > Labor > Job Codes > Functions.
Movie

Use the Movie function to play a movie (video) for specific employees, or all employees, upon clock-in. This is a great tool for training and motivating your employees, and greatly reduces your training costs.

With this feature, you can do the following:

• Assign a movie to play for a specific job code.
• Assign a movie to play for a specific employee.
• Define a range of dates for which the movie plays.
• Restrict the time of day the movie plays, so the movie does not play for employees that clock in during busy hours.
• Define the number of times a movie plays during a range of dates.

Refer to the Clock-In Movie Feature Focus Guide for more information on configuring movies to play at clock-in.
Select Maintenance > Messages > Movie to display the Movie function.

![Figure 8-5 Movie Messages Function Tab](image)

**Number** — Indicates the three-digit number that, combined with the entry in the first message text box, uniquely identifies each record. To create a new record, enter an unused ID number and press Enter. To edit an existing record, scroll through the ID drop-down list, select the record and press Enter.

**Description** — Permits up to 20 characters of text for naming the movie.

**File Name** — Represents the full path and the name of the movie. We recommend placing the media file in the Recipe or Bmp folder on the file server, which propagates to the FOH terminals upon a refresh. If you create a mapping to run the file with the application located on the file server, the playback becomes exceptionally slow and might contain pauses. Click Browse to locate the movie to play when the employee clocks in.

The Clock-In Movie feature utilizes the (43) Activate Movie event type to specify the movie to play at clock-in. Refer to Events in the System chapter for more information regarding configuring and using events.
**Employees** — Designates specific employees for which you want the movie to play when they clock in. The Aloha system keeps track of the employees for which the movie played in MovieHst.dbf.

**Job Codes** — Designates the job codes for which you want the movie to play when they clock in.

**Start Date** — Indicates the date of business, in *mm/dd/yyyy* format, for the movie to begin playing.

**End Date** — Indicates the date of business, in *mm/dd/yyyy* format, for the movie to stop playing.

**# Of Plays** — Specifies the number of times you want the movie to play within the specified date range. The Aloha system keeps track of the number of times the movie plays, and for whom, in MovieHst.dbf.

**Max Play Time** — Specifies the number of seconds the movie can play, with 999 as the maximum. The FOH closes the playback application when the time is reached. You should set this value to 0 for all media files except flash files. For flash media files, type the actual playing length of the movie. If you type 0, then the flash media file will not close on the FOH. If you type a value less than the length of the movie, the flash media file closes before the movie finishes.
Aloha Glossary

**BOGO (Buy One Get One)** — A type of promotion in which the customer purchases one item at the regular price and receives another of the same item free.

**BOH (Back-of-House)** — The file server from which Aloha Manager is launched. This file server also stores the dated subdirectories created during the EOD process.

**Checkout** — Checkout is a process that generates a printed listing of sales, payments, comps, promos, cash due, and so on, for a specific employee. A checkout is performed at the end of the employee’s shift in preparation for turning in money due the restaurant prior to the employee clocking out. This is only required of employees who handle money.

**Chit** — A printed version of the customer’s order. It prints or displays on remote printers or video monitors which are typically located in the bar and/or kitchen area. This aids the kitchen personnel and bartender in preparation of the order.

**Clockout chit** — A printed receipt showing the date and time an employee clocked out, and the employee’s name, job code, and unpaid break times.

**Comps** — A method in which items on a guest check are discounted (given away as complimentary) by a dollar amount or a percentage. Typically used for frequent diner incentives, employee meals, or to appease an upset customer.

**Cool interface** — One of three color themes available for the FOH (Front-of-House), including: Marble, Fabric, Blue Stone, and Wave. These are in addition to the default interface.
**CounterService** — Aloha QuickService flag setting which limits the end-user to two FOH terminals and three remote printers or remote display systems. All other functionality is the same. Allows the Aloha POS system to be cost effective and cost competitive for smaller venues (Mom & Pop shops).

**DATA subdirectory** — The \Data subdirectory contains the working data for the FOH terminals of the restaurant, and is a subdirectory of the \Aloha directory.

**Dated subdirectory** — The directory or file folder created by the EOD (End of Day) process that contains all of the sales data and all other data for that DOB (Date of Business). These dated subdirectories are stored on the BOH file server.

**Day Parts** — Day Parts are defined to divide the day into parts for reporting purposes, such as Breakfast, Lunch, Dinner, Happy Hour, and so on. The Event Scheduler triggers period changes using only a start time, with the subsequent period start time serving as the end time for the previous period.

**DBF** — Database files. These files have a .DBF extension.

**Debout (Debugging Output) files** — Debugging output files are created by and used by the Aloha POS system for system troubleshooting. A separate debout file is created for each terminal on the network including the BOH file server. Debouts are also created for the EOD (End-of-Day) process, EDC (Electronic Draft Capture) for credit card processing, the grind process, and so on.

**DOB** — Date-of-Business.

**Done30** — Marker file created by the EOD (End-of-Day) process to indicate the EOD completed successfully.

**EDC (Electronic Draft Capture)** — EDC is the technology used in the processing of credit card, debit card, and gift card transactions as payment for goods and/or services.

**EGI (Enhanced Graphic Interface)** — EGI enables you to use gradient, shadowing, and texture enhancements on the buttons on the FOH. If the computer running the interface has High Color (16 bits or greater), and has 64 MB of RAM or greater, the feature is automatically enabled. If the system does not meet these requirements, the regular default screen appears.

**Environment variables** — Environment variables are strings consisting of environment information, such as a drive, path, or file name, associated with a symbolic name that can be used by
operating systems, including: Windows95, Windows98, and WindowsNT. The defined environment variables are read and set by the system when it boots up. (Examples: path to the Aloha POS software, number of terminals on network, whether the terminal is capable of serving as master terminal or server.)

**EOD (End-of-Day)** — The EOD (End-of-Day) process is a simple procedure that closes out the sales for a given DOB (Date-of-Business) and starts the new DOB with a fresh Trans.log (transaction log) file and fresh Prt#.log (printer log) files. The EOD process is typically scheduled to occur as an automatic process every day at a certain time during a non-peak period; however, the EOD may be run manually from either the FOH (Front-of-House) or BOH (Back-of-House).

**Event** — Many common restaurant procedures for standard operations can be automated using the Event Scheduler. The Event Scheduler can be configured to automatically activate menus, reroute printers, change meal periods, change order entry modes, automate the EOD process, or any other activity that has an Active option switch as part of the database file record.

**File server** — The file server is the BOH computer which launches the Aloha Manager program.

**FOH (Front-of-House)** — FOH is the interface accessed by servers, bartenders, managers, cashiers, and other restaurant personnel to clock in/out, ring transactions, close checks, perform checkouts, and so on. FOH also refers to the hardware used at the FOH workstations.

**GndDBF30.XXX** — Marker file created by CTL (Control) to indicate that the grind process for a given DOB completed successfully.

**Grind** — The grinder (Grind.exe) is a BOH executable program which reads the Trans.log (transaction log) for a given DOB and creates a series of DBF files which contain all relevant information for that DOB. This program insulates other system components from the need to understand the encrypted, proprietary transaction log. The grinder is typically invoked automatically by the Control program approximately 30 seconds following a successfully completed EOD process. If the grinder is successful, it creates a marker file, GndDbf30.XXX, and places it in the dated subdirectory created during the EOD process.

**House accounts** — The House Account feature is available for use as an accounts receivable module within the Aloha POS system, when combined with a correctly defined house account tender.

**Iber (Iber.exe or IberQS.exe)** — Iber.exe and IberQS.exe are the executable program files that launch the FOH interface for TableService and QuickService, respectively.
**IberCfg.bat** — IberCFG.bat is a batch file which contains all of the Aloha POS environment variables. We recommend calling this batch file from within the AutoExec.bat batch file so that the environment variables are read and set when the system boots up.

**Iberdir** — Stands for Iber directory and represents the drive letter and full path up to the \Bin directory of Aloha. When referring to iberdir in this document, you must type the full path up to the \Bin directory, as installed on your system. For example, if you installed Aloha QuickService on drive C, \texttt{<iberdir>\AlohaQS}, or if you installed Aloha QuickService under a bootdrive share on drive C, \texttt{<iberdir>\Bootdrv\AlohaQS}.

**Item Lookup** — The Item Lookup function allows the price of an item to be located using its name or SKU (Stock Keeping Unit) number as defined in Item maintenance. The Item Lookup function was created to be used in a retail environment; however, it is not necessarily limited to retail items only.

**Mag Card Reader or Mag Stripe Reader** — A mag card reader is a device that reads and interprets the magnetic stripe encoded on a credit card, debit card, smart card, or other card used by an employee to log on to the Aloha POS system.

**Master terminal** — The master terminal acts as a sort of arbitrator among the terminals on the network, and manages some important network communication tasks. The master terminal is responsible for running the EOD process.

**Mastercapable** — Mastercapable is an environment variable which stipulates whether a terminal is capable of taking over as the master terminal in the event that the true master terminal is down or cannot be located by other terminals on the network.

**NewData Directory** — The NewData directory is the subdirectory of the \Aloha directory which contains data that has been changed or modified, but is not currently being used by the FOH at the restaurant.

**Order Time** — Order time is the time at which items are ‘sent to the kitchen’. When using the Advance Orders feature, the system uses the following calculation: \texttt{Serve Time - Prep Time = Order Time}.

**Ordered Items** — Ordered items are items that are ‘sent to the kitchen’. The text displays as black in the guest check window and you must perform a void to remove them from the check.
PLU (Price Look Up) — The PLU (Price Look Up) function allows the price of an item to be located using its PLU number as defined in Item maintenance.

PMS (Property Management System) — The industry standard interface for hotels to manage the various functions of a hotel. The Aloha POS system interfaces with the following PMS systems: Aloha PMS, Generic Micros 4700, Encore, RDP, Springer Miller, HIS, CSS, and Fidelio.

POS — Point-of-Sale

Prep Time — Indicates the time required to prepare an order.

Printer groups — Printer groups allow individual printers to be combined into logical groups, once the individual printers have been defined in Maintenance. This allows routing of items to individual or multiple remote printers for chit printing. Printer groups can contain between zero and five individual printers, and are attached to the item at the item level in Item maintenance.

Printer logs — All printing for the current DOB is stored in printer log files called Prt#.log, with the # being a variable corresponding to the record ID for each printer as defined in Maintenance. These log files are located in the Data subdirectory of \Aloha, and function similarly to the Trans.log, containing all printing that has been sent to a given printer on the current day, as well as indicators as to the data which has printed successfully.

Promos (Promotions) — Promotions allow special pricing specific to the promotion being offered. Promotions might be defined for discounts, specials, coupons, and combo meals; and might be seasonal or always available. Six predefined promotion types are offered: BOGO, Combo, Coupon, New Price, Check Reduction, Package Promo, and Quick Combo.

Punch — A punch refers to the clock in and out times of an employee, hence the term, ‘punching the clock’.

QuickService — Aloha QuickService is Radiant’s product offering specifically designed for fast food restaurant environments.

Receipt printer — A receipt printer is a printer physically located in the customer area of a restaurant, and is used to print guest checks and credit card vouchers.

Redundancy — Redundancy architecture is designed to retain maximum system functionality in the event of common hardware failures. There are three types of failures: BOH file server down, master terminal down, and complete network failure (hub failure). Redundancy provides a
system of fault tolerance that allows the restaurant to continue functioning regardless of the type of failure experienced.

**Refresh** — Refresh is a process which copies all system configuration files from the \NewData subdirectory of \Aloha to the \Data subdirectory of \Aloha. Changes made to the database are made within Maintenance (\NewData directory). The changes do not take effect on the FOH until a refresh occurs (FOH reads the files in the \Data directory).

**Remote printer** — A remote printer is a printer physically located in the bar or food preparation area of a restaurant, and is used to print kitchen chits.

**Revenue center** — Revenue centers are defined and used for reporting purposes. Typically, revenue centers correspond with the areas of the restaurant, such as: Dining Room, Bar, Patio, Cigar Lounge, Banquets, and Room Service (hotel).

**Serve Time** — Indicates the time the guest expects to receive or pick up their order.

**Servercapable** — Servercapable is an Aloha POS environment variable which stipulates whether a terminal is capable of taking over as the file server in the event that the true file server is down or cannot be located by other terminals on the network.

**SKU** — Stock Keeping Unit

**Tender** — Valid types of payment that a restaurant accepts as payment for goods and services. These include cash, credit cards, house accounts, and so on.

**Time Slice** — A time slice indicates an employee’s shift using the basic labor scheduler program within Aloha Manager. The left end represents the clock in time and the right end represents the clock out time for the shift.

**Trans.log** — The Trans.log (transaction log) is a file stored in the \Data subdirectory of \Aloha. It contains all activity and transactions for the current DOB. The log stores all FOH activity that occurs during the current DOB in this secure, proprietary encrypted format. New data is appended to the log. It is impossible to lose checks with this system, since every change to the system is reflected in the log. The log also provides a natural audit trail for monitoring potential misuse of the system by employees.

**Unordered Items** — Unordered items are items that are entered but not ‘sent to the kitchen’. The text displays as blue in the guest check window.
**Winhook** — The Winhook feature is used to launch a custom batch file following the EOD process. Custom batch files allow the automation of certain routines that are outside the system but address Aloha data files, such as compressing, or zipping, data files and copying them to another drive.
Networking Glossary

10Base2 — 10 Mbps Baseband Ethernet specification using RG-58 thinnet 50-ohm thin coaxial cable with BNC T Connector. (Limit 185 meters.)

10Base5 — 10 Mbps Baseband Ethernet specification using Thicknet DIX/AUI 50-ohm Baseband coaxial cable. (Limit 500 meters.)

10BaseF — 10 Mbps Baseband Ethernet specification for the 10BaseFB, 10BaseFL, and 10BaseFP standards for Ethernet over fiber-optic cabling.

10BaseFB — 10 Mbps Baseband Ethernet specification using fiber optic cabling. Provides a synchronous signaling backbone that allows additional segments and repeaters to be connected to the network. (Limit 2000 meters.)

10BaseFL — 10 Mbps Baseband Ethernet specification using fiber optic cabling. It is designed to replace the FOIRL specification. (Limit 2000 meters, 1000 meters w/FOIRL.)

10BaseFP — 10 Mbps Fiber-passive Baseband Ethernet specification fiber optic cabling. Used to organize computers into a star topology without the use of repeaters. (Limit 500 meters.)

10BaseT — A variant of Ethernet which allows stations to be attached via twisted pair cable. 10 Mbps Baseband Category 3, 4, or 5 UTP cable RJ-45. One pair for transmitting data and the other for receiving data. (Limit 100 meters.)

10Broad36 — 10 Mbps Broadband Ethernet specification using Broadband coaxial cable. (Limit 3600 meters.)
**100BaseFX** — 100 Mbps Baseband Fast Ethernet specification using two strands of multimode fiber optic cabling per link. (Limit 400 meters).

**100BaseT** — 100 Mbps Baseband Fast Ethernet specification using Category 5 UTP cable RJ-45 connectors. The 100BaseT link pulses, which are sent when there is no traffic, contain more information than those used in 10BaseT.

**100BaseT4** — 100 Mbps Baseband Fast Ethernet specification using four pairs of Category 3, 4, or 5 UTP wiring. (Limit 100 meters).

**100BaseTX** — 100 Mbps Baseband Fast Ethernet specification using two pairs of either UTP or STP wiring. The first pair is used to receive data; the second is used to transmit data. (Limit 100 meters).

**100BaseX** — 100 Mbps Baseband Fast Ethernet specification for the 100BaseFX and 100BaseTX standards for Fast Ethernet over fiber optic cabling.

**100VG-AnyLAN** — 100 Mbps Fast Ethernet and Token Ring media technology (developed by Hewlett-Packard). It uses four pairs of Category 3, 4 or 5 UTP cabling. This high speed technology can be made to operate on existing 10BaseT.

**ANSI** — American National Standards Institute. The United States government body responsible for approving US standards in many areas, including computers and communications. ANSI is a member of ISO. ANSI sells ANSI and ISO (international) standards.

**APDU** — Application Protocol Data. A packet of data exchanged between two application programs across a network. This is the highest level view of communication in the OSI seven layer model and a single packet exchanged at this level may actually be transmitted as several packets at a lower layer as well as having extra information (headers) added for routing, and so on.

**ARP** — Address Resolution Protocol. A method for finding a host’s Ethernet address from its Internet address. The sender broadcasts an ARP packet containing the Internet address of another host and waits for it (or some other host) to send back its Ethernet address. Each host maintains a cache of address translations to reduce delay and loading. ARP allows the Internet address to be independent of the Ethernet address but it only works if all hosts support it.

**ATM** — Asynchronous transfer mode – fixed packets – Broadband. Speeds up to 622 Kbps – used mainly for ISP backbones because of cost. 53 byte cells instead of packets. – Packet switching protocol. A method for the dynamic allocation of bandwidth using a fixed-size packet (called a cell).
ATS — Asynchronous Terminal Server

ALOHA — A system of contention resolution devised at The University of Hawaii. Packets are broadcast when ready, the sender listens to see if they collide and if so retransmits after a random time. Slotted ALOHA constrains packets to start at the beginning of a time slot. Basic ALOHA is appropriate to long propagation time nets (such as, satellite). For shorter propagation times, carrier sense protocols are possible.

Address mask — A bit mask used to identify which bits in an IP address correspond to the network address and subnet portions of the address. This mask is often referred to as the subnet mask because the network portion of the address can be determined by the class inherent in an IP address. The address mask has ones in positions corresponding to the network and subnet numbers and zeros in the host number positions.

Aloha — A Hawaiian greeting. Also the world’s best POS software.

Analog — A description of a continuously variable signal or a circuit or device designed to handle such signals. The opposite is discrete or digital. Analog circuits are much harder to design and analyze than digital ones because the designer must take into account effects such as the gain, linearity and power handling of components, the resistance, capacitance and inductance of PCB tracks, wires and connectors, interference between signals, power supply stability and more.

A digital circuit design, especially for high switching speeds, must also take these factors into account if it is to work reliably, but they are usually less critical because most digital components will function correctly within a range of parameters whereas such variations will corrupt the outputs of an analog circuit.

Application Layer — The top layer of the OSI seven layer model. This layer handles issues like network transparency, resource allocation and problem partitioning. The application layer is concerned with the user’s view of the network (such as formatting electronic mail messages). The presentation layer provides the application layer with a familiar local representation of data independent of the format used on the network.

Asynchronous Transmission — Transmission in which time intervals between transmitted characters may be of unequal length. Transmission is controlled by start and stop bits. Data stream passed in one direction. Most common.

Attenuation — The degrading of a signal as it travels farther from its origination.
**BDC** — Backup Domain Controller. A computer that receives a copy of the domain’s security policy and database and authenticates network logins. (It provides a backup in case the PDC becomes unavailable. It is not required but is recommended to be a backup to the PDC.)

**Bandwidth** — The amount of data that can be sent through a given communications circuit per second.

**Baseband** — A transmission medium through which digital signals are sent without frequency shifting. In general, only one communication channel is available at any given time. Ethernet is an example of a baseband network.

**Binary** — 1. Base two. A number representation consisting of zeros and ones used by practically all computers because of its ease of implementation using digital electronics and Boolean algebra. 2. Any file format for digital data encoded as a sequence of bits but not consisting of a sequence of printable characters (text). The term is often used for executable machine code. Of course all digital data, including characters, is actually binary data (unless it uses some (rare) system with more than two discrete levels) but the distinction between binary and text is well established.

**Bit** — (b) binary digit. The unit of information; the amount of information obtained by asking a yes-or-no question; a computational quantity that can take on one of two values, such as true and false or 0 and 1; the smallest unit of storage - sufficient to hold one bit. A bit is said to be set if its value is true or 1, and reset or clear if its value is false or 0. One speaks of setting and clearing bits. To toggle or invert a bit is to change it, either from 0 to 1 or from 1 to 0.

**Bitwise** — A bitwise operator treats its operands as a vector of bits rather than a single number. Boolean bitwise operators combine bit N of each operand using a Boolean function (NOT, AND, OR, XOR) to produce bit N of the result. For example, a bitwise AND operator (& in C) would evaluate 13 & 9 as (binary) 1101 & 1001 - 1001 - 9, whereas, the logical AND, (C &&) would evaluate 13 && 9 as TRUE && TRUE - TRUE - 1.

In some languages, such as Acorn’s BASIC V, the same operators are used for both bitwise and logical operations. This usually works except when applying NOT to a value x which is neither 0 (false) nor -1 (true), in which case both x and (NOT x) will be nonzero and thus treated as TRUE. Other operations at the bit level, which are not normally described as ‘bitwise,’ include shift and rotate.

**Boolean** — The type of an expression with two possible values, true and false. Also, a variable of Boolean type or a function with Boolean arguments or result. The most common Boolean functions are AND, OR and NOT.
**Bit mask** — A pattern of binary values which is combined with some value using bitwise AND with the result that bits in the value in positions where the mask is zero are also set to zero.

**Bridge** — A device which forwards traffic between network segments based on data link layer information. These segments would have a common network layer address.

**Broadband** — A transmission medium capable of supporting a wide range of frequencies, typically from audio up to video frequencies. It can carry multiple signals by dividing the total capacity of the medium into multiple, independent bandwidth channels, where each channel operates only on a specific range of frequencies.

**Broadcast** — A transmission to multiple, unspecified recipients. On Ethernet, a broadcast packet is a special type of multicast packet which all nodes on the network are always willing to receive.

**Broadcast storm** — A broadcast on a network that causes multiple hosts to respond by broadcasting themselves, causing the storm to grow exponentially in severity.

**Bus Topology** — Bus consists of a single linear cable called a trunk. Data is sent to all computers on the trunk. Computers listen and accept only messages addressed to them. Bus is a passive topology. Performance degrades as more computers are added to the bus. Signal bounce is eliminated by a terminator at each end of the bus. Barrel connectors can be used to lengthen cable. Repeaters can be used to regenerate signals.

**Byte** — A unit of information, often 1 character, made up of 8 bits.

**CAT 1** — Voice only

**CAT 2** — 4 Mbps

**CAT 3** — 10 Mbps

**CAT 4** — 16 Mbps

**CAT 5** — 100 Mbps

**CRC** — Cyclic Redundancy Check or Cyclic Redundancy Code. A number derived from, and stored or transmitted with, a block of data in order to detect corruption. By recalculating the CRC and comparing it to the value originally transmitted, the receiver can detect some types of transmission errors.
**CSMA/CD** — Carrier Sense Multiple Access / Collision Detect. The low level network arbitration protocol used on Ethernet. Nodes wait for quiet on the net before starting to transmit and listen while they are transmitting. If two nodes transmit at once the data gets corrupted. The nodes detect this and continue to transmit for a certain length of time to ensure that all nodes detect the collision. The transmitting nodes then wait for a random time before attempting to transmit again thus minimizing the chance of another collision. The ability to detect collision during transmission reduces the amount of bandwidth wasted on collisions compared with simple Aloha broadcasting.

**CSMA/CA** — Collision Avoidance; Announces intention to send data (Appletalk).

**CTS** — Clear to Send

**Checksum** — A computed value that depends on the contents of a block of data and which is transmitted or stored along with the data in order to detect corruption of the data. The receiving system recomputes the checksum based upon the received data and compares this value with the one sent with the data. If the two values are the same, the receiver has some confidence that the data was received correctly. The checksum may be 8 bits (modulo 256 sum), 16, 32, or some other size. It is computed by summing the bytes or words of the data block ignoring overflow. The checksum may be negated so that the total of the data words plus the checksum is zero. Internet packets use a 32-bit checksum.

**Circuit switching** v — A communications paradigm in which a dedicated communication path is established between the sender and receiver along which all packets travel. The telephone system is an example of a circuit switched network. Also called connection-oriented. Contrast connectionless, packet switching.

**Collision** — When two hosts transmit on a network at once causing their packets to collide and corrupt each other.

**Collision detection** — A class of methods for sharing a data transmission medium in which hosts transmit as soon as they have data to send and then check to see whether their transmission has suffered a collision with another host’s. If a collision is detected then the data must be resent. The resending algorithm should try to minimize the chance that two hosts’ data will repeatedly collide. For example, the CSMA/CD protocol used on Ethernet specifies that they should then wait for a random time before retransmitting.

**Combination Networks** — Combines the features of both peer-to-peer and Server based networks, Users can share resources among themselves as well as access server-based resources.
**Connection** — The data communication method in which communication occurs between hosts with no previous setup. Packets sent between two hosts may take different routes. UDP is a connectionless protocol. Also called packet switching. Contrast circuit switching, connection-oriented.

**Connection-oriented** — (Or connection-based, stream-oriented). A type of transport layer data communication service that allows a host to send data in a continuous stream to another host. The transport service will guarantee that all data will be delivered to the other end in the same order as sent and without duplication. Communication proceeds through three well-defined phases: connection establishment, data transfer, connection release. The most common example is Transmission Control Protocol (TCP).

**Connectionless Protocol** — The data communication method in which communication occurs between hosts with no previous setup. Packets sent between two hosts may take different routes. Also called packet switching. Contrast circuit switching, connection-oriented.

**Constant mapping** — Some TCP software constructs the destination Ethernet Address from the top 24 bits of the Ethernet address followed by the low 24 bits of the (class A) destination Internet address. For this scheme the top 24 bits of the Ethernet address must be the same on all hosts on the net. Contrast ARP.

**Contention slot** — (Or contention period). Minimum time a host must transmit for before it can be sure that no other host’s packet has collided with its transmission. If the maximum propagation delay from one host to any other is T, then a host that starts to transmit at time t₀ may collide with a host that starts just before t₀ + T. The first host will not detect the collision until time t₀ + 2T.

**Cross-over**. See Null Modem.

**Cross-pinning**. See Null Modem.

**Crosstalk** — Signal overflow from one wire to another adjacent wire.

**DB9** — The standard 9-pin D-shell connector used for RS-232 serial communication.

**DB25** — The standard 25-pin D-shell connector used for RS-232 serial communication.

**DCE** — Data Communications Equipment
**DHCP** — Dynamic Host Configuration Protocol. A protocol that provides a means to dynamically allocate IP addresses to computers on a local area network. The system administrator assigns a range of IP addresses to DHCP and each client computer on the LAN has its TCP/IP software configured to request an IP address from the DHCP server. The request and grant process uses a lease concept with a controllable time period.

**DNS** — Domain Name Services - A general-purpose distributed, replicated, data query service chiefly used on Internet for translating hostnames into Internet addresses. Also, the style of hostname used on the Internet, though such a name is properly called a fully qualified domain name. DNS can be configured to use a sequence of name servers, based on the domains in the name being looked for, until a match is found.

**DSR** — Data Set Ready

**DSU** — Digital Service Unit

**DTE** — Data Terminal Equipment.

**DTR** — Data Terminal Ready

**DVM** — Digital VoltMeter) – Uses voltage, tests for continuity or short.

**Datagram** — A self-contained, independent entity of data carrying sufficient information to be routed from the source to the destination computer without reliance on earlier exchanges between this source and destination computer and the transporting network.

**Data Link Layer** — The third lowest layer in the OSI seven layer model. The network layer determines routing of packets of data from sender to receiver via the data link layer and is used by the transport layer. The most common network layer protocol is IP.

**Deferral** — Waiting for quiet on the Ethernet.

**Digital** — A description of data that is stored or transmitted as a sequence of discrete symbols from a finite set, most commonly this means binary data represented using electronic or electromagnetic signals. The opposite is analog.

**Domain** — On the Internet, ‘domain’ is most commonly used to refer to a group of computers whose hostnames share a common suffix, the domain name. The last component of this is the top-level domain.
**Domain address** — The name of a host on the Internet belonging to the hierarchy of Internet domains.

**Dot notation** — Berkeley UNIX notation for Internet addresses. An Internet address in dot notation consists of one to four numbers in hexadecimal (leading 0x), octal (leading 0) or decimal. It represents a 32-bit address. Each leading number represents eight bits of the address (high byte first) and the last number represents the rest. Such as address 0x25.32.0xab represents 0x252000ab. By far the most common form is four decimal numbers, such as 146.169.22.42. Many commands will accept an address in dot notation in place of a hostname.

**Dynamic Router** — Automatically track routes. Routers talk to routers and add them to the tables.

**Dynamic Routing** — Routing that adjusts automatically to network topology or traffic changes.

**Ethernet** — A local area network. IEEE 802.3, recognized as the industry standard. Data is broken into packets that are transmitted using the CSMA/CD algorithm until they arrive at the destination without colliding with any other. The first contention slot after a transmission is reserved for an acknowledge packet. A node is either transmitting or receiving at any instant. The bandwidth is about 10 Mbps.

Disk-Ethernet-Disk transfer rate with TCP/IP is typically 30 kilobyte per second. Version 2 specifies that collision detect of the transceiver must be activated during the inter-packet gap and that when transmission finishes the differential transmit lines are driven to 0V (half step). It also specifies some network management functions such as reporting collisions, retries and deferrals. Ethernet cables are classified as XbaseY, such as 10base5, where X is the data rate in Mbps, ‘base’ means baseband (as opposed to radio frequency) and Y is the category of cabling. The original cable was 10base5 (full-spec), others are 10Base2 (thinnet) and 10BaseT (twisted-pair) which is now very common. 100baseT (Fast Ethernet) is also increasingly common.

**Ethernet Address** — Or MAC address. The physical address identifying an individual Ethernet controller board. An Ethernet address is a 48-bit number aabbccddeeff where a-f are hexadecimal digits. The first 24 bits, aabbcc, identify the manufacturer of the controller. The Ethernet address is hard-wired on some controllers, stored in a ROM on some, and others allow it to be changed from software. It is usually written as six hexadecimal numbers, such as 08:00:20:03:72:DC.

**FDDI** — Fiber Distributed Data Interface. 100Mbps Used mainly for MAN technology - works in a double ring. Like Token-Ring, only many frames can go on the token, not just one.
**FQDN** — Fully Qualified Domain Name. The full name of a system, consisting of its local hostname and its domain name. For example, ‘venera’ is a hostname and ‘venera.isi.edu’ is Fully Qualified Domain Name. An FQDN should be sufficient to determine a unique Internet address for any host on the Internet.

The same naming scheme is also used for some hosts which are not on the Internet, but share the same name-space for electronic mail addressing. A host that does not have an FQDN (which is not ‘domainist’) must be addressed using a bang path. All Internet computers and most UUCP sites can now resolve FQDNs, thanks to a large amount of behind-the-scenes magic and PD software written since 1980 or so.

**Fast Ethernet** — A version of Ethernet developed in the 1990s that can carry 100 Mbps compared with standard Ethernet 10 Mbps. It requires upgraded network cards and hubs. The relevant standards are 100baseT, 100BaseFX and 100BaseVG.

**Fiber Optic Cable** — Cable constructed of pure glass using light beams to transmit large amounts of data. Resistant to interference. Speeds of between 100Mbps - 200,000Mbps.

**File server** — Hardware and software that together provide file-handling and storage functions for multiple users on a local area network. Storing files on a file server saves having multiple copies stored on individual computers, thus economizing on disk space and also makes administering and updating the files easier.

**Flow control** — The collection of techniques used in serial communications to stop the sender sending data until the receiver can accept it. This may be either software flow control or hardware flow control. The receiver typically has a fixed size buffer into which received data is written as soon as it is received. When the amount of buffered data exceeds a ‘high water mark,’ the receiver will signal to the transmitter to stop transmitting until the process reading the data has read sufficient data from the buffer that it has reached its ‘low water mark,’ at which point the receiver signals to the transmitter to resume transmission.

**Fragment** — A piece of a packet. When a router is forwarding an IP packet to a network that has a maximum packet size smaller than the packet size, it is forced to break up that packet into multiple fragments. These fragments will be reassembled by the IP layer at the destination host.

**Fragmentation** — The IP process in which a packet is broken into smaller pieces, fragments, to fit the requirements of a physical network over which the packet must pass. The inverse is reassembly.

Gateway — Works at all layers. Gateways change format of the data to make it conform to the application program at the receiving end. Strips packet and rebuilds with new protocol info, that is, PC connectivity to mainframe. Gateway strips PC packet and rebuilds it in mainframe form. Proxy server is gateway to the Internet.

Hexadecimal — Or ‘hex.’ Base 16. A number representation using the digits 0-9, with their usual meaning, plus the letters A-F (or a-f) to represent hexadecimal digits with values of (decimal) 10 to 15. The right-most digit counts ones, the next counts multiples of 16, then $16^2 - 256$, and so on.

Hop — One direct host-to-host connection forming part of the route between two hosts in a routed network such as the Internet. Some protocols place an upper limit on the hop count in order to detect routing loops.

Host — A computer connected to a network. The term node includes devices such as routers and printers which would not normally be called hosts.

Host number — The host part of an Internet address. The rest is the network number.

Hostname — The unique name by which a computer is known on a network, used to identify it in electronic mail, Usenet news, or other forms of electronic information interchange.

HOSTS — File that contains mappings between DNS host names and their IP addresses.

IEEE — Institute of Electrical and Electronic Engineers. The world’s largest technical professional society, based in the USA. Founded in 1884 by a handful of practitioners of the new electrical engineering discipline, today’s Institute has more than 320,000 members who participate in its activities in 147 countries.

The IEEE sponsors technical conferences, symposia and local meetings worldwide, publishes nearly 25% of the world’s technical papers in electrical, electronics and computer engineering and computer science, provides educational programs for its members and promotes standardization. Areas covered include aerospace, computers and communications, biomedical technology, electric power and consumer electronics. To learn more go to: http://grouper.ieee.org/groups/802/802info.html.
**IP** — Internet Protocol. The network layer for the TCP/IP protocol suite widely used on Ethernet networks, defined in STD 5, RFC 791. IP is a connectionless, best-effort packet switching protocol. It provides packet routing, fragmentation and reassembly through the data link layer.

**IP address** — See **Internet Address**.

**IPX/SPX** — Novell. Similar to NetBEUI, only routable.

**IRQ** — Interrupt Request. The following is a list of common IRQ settings:

- 2 (9) EGA/VGA
- 3 Available (or COM2,COM4)
- 4 COM 1, COM 3
- 5 Available (unless LPT2 or sound card)
- 6 Floppy Disk Controller
- 7 Parallel port (LPT1)
- 8 Real-time clock
- 10 Available
- 11 Available
- 12 Mouse (PS/2)
- 13 Math Coprocessor
- 14 Hard-disk controller
- 15 Available

**ISDN** — Integrated services digital network; 128 bits per second - 2B+D - 2 64Kbps B channels & 1 16Kbps D channel. Voice, data, images; signaling and link management.

**ISO** — A voluntary, nontreaty organization founded in 1946, responsible for creating international standards in many areas, including computers and communications. ISO produced the OSI seven-layer model for network architecture. Its members are the national standards organizations of 89 countries, including the American National Standards Institute. The term **ISO** is not actually an acronym for anything. It is a pun on the Greek prefix iso-, meaning ‘same.’ Some ISO documents say ISO is not an acronym even though it is an anagram of the initials of the organization’s name.
**Internet address** — IP address, TCP/IP address. The 32-bit host address defined by the Internet Protocol in STD 5, RFC 791. It is usually represented in dotted decimal notation. A host’s Internet address is sometimes related to its Ethernet address. The Internet address is usually expressed in dot notation, such as 128.121.4.5. The address can be split into a network number (or network address) and a host number unique to each host on the network and sometimes also a subnet address. The way the address is split depends on its class, A, B or C as determined by the high address bits:

Class A - high bit 0, 7-bit network number, 24-bit host number n1.a.a.a 0 <- n1 <- 127

Class B - high 2 bits 10, 14-bit network number, 16-bit host number n1.n2.a.a 128 <- n1 <- 191

Class C - high 3 bits 110, 21-bit network number, 8-bit host number n1.n2.n3.a 192 <- n1 <- 223

The Internet address must be translated into an Ethernet address by either ARP or constant mapping. The term is sometimes used incorrectly to refer to a host’s fully qualified domain name.

**Internetworking** — The interconnection of two or more networks, usually local area networks so that data can pass between hosts on the different networks as though they were one network. This requires some kind of router or gateway.

**Inter-packet gap** — A time delay between successive data packets mandated by the network standard for protocol reasons. In Ethernet, the medium has to be ‘silent’ (that is, no data transfer) for a few microseconds before a node can consider the network idle and start to transmit. This is necessary for fairness reasons. The delay time, which approximately equals the signal propagation time on the cable, allows the “silence” to reach the far end so that all nodes consider the network idle.

**Jitter** — Instability in a signal wave; caused by signal interference or an unbalanced FDDI ring or Token Ring.

**LAN** — Local Area Network. A data communications network which is geographically limited (typically to a 1 km radius) allowing easy interconnection of computers within adjacent buildings. Ethernet and FDDI are examples of standard LANs. Because the network is known to cover only a small area, optimizations can be made in the network signal protocols that permit data rates up to 100 Mbps.

**Lana** — The NetBIOS LANA (LAN Adapter) number identifies the transport driver, network interface card (NIC) driver, and adapter that will be used to send and receive NetBIOS packets.
Each transport driver (protocol), network interface card driver, and adapter will use a different lana number.

**LLC** — Logical Link Control. The lower sublayer of the data link layer. The interface between a node’s Logical Link Control and the network’s physical layer. The MAC differs for various physical media.

**LMHOSTS** — File that contains mappings between NetBIOS computer names and their IP addresses.

**Latency** — 1. The time it takes for a packet to cross a network connection, from sender to receiver. 2. The period of time that a frame is held by a network device before it is forwarded. Two of the most important parameters of a communications channel are its latency and its bandwidth.

**MAC** — The lower sublayer of the data link layer. The interface between a node’s Logical Link Control and the network’s physical layer. The MAC differs for various physical media.

**MAN** — Metropolitan Area Network. A data network intended to serve an area the size of a large city. Such networks are being implemented by innovative techniques, such as running optical fiber through subway tunnels.

**Mbps** — Megabits per second. Millions of bits per second. A unit of information transfer rate. For example, Ethernet can carry 10 Mbps.

**Mesh** — Commonly used in WAN configurations. Routers are connected to multiple links for redundancy and to give the ability to determine the quickest route to a destination.

**Mnemonic** — A shortened version of a command word, such as TXD for Transmit Data.

**Multiplexer** — Mux. Combines several separate data channels for transmission over a single line.

**NDIS** — Used to bind multiple protocols to a network adapter.

**NIC** — Network Interface Card. An adapter circuit board installed in a computer to provide a physical connection to a network.

**NRZ** — Non-Return to Zero
NWLINK — Microsoft version of IPX/SPX.

NetBEUI — NetBIOS Extended User Interface. The network transport protocol used by all of Microsoft’s network systems and IBM’s LAN Server based systems. NetBEUI is often confused with NetBIOS. NetBIOS is the applications programming interface and NetBEUI is the transport protocol.

NetBIOS — An application programming interface (API) which activates network operations on IBM PC compatibles running under MS-DOS. It is a set of network commands that the application program issues in order to transmit and receive data to another host on the network. The commands are interpreted by a network control program or network operating system that is NetBIOS compatible.

Name resolution — The process of mapping a name to its corresponding address. The Domain Name System is the system that does name resolution on the Internet.

Netmask — A 32-bit mask which shows how an Internet address is to be divided into network, subnet and host parts. The netmask has 1s in the bit positions in the 32-bit address which are to be used for the network and subnet parts, and zeros for the host part. The mask should contain at least the standard network portion (as determined by the address’s class), and the subnet field should be contiguous with the network portion.

Network — Hardware and software data communication systems. The OSI seven layer model attempts to provide a way of partitioning any computer network into independent modules from the lowest (physical) layer to the highest (application) layer. Many different specifications exist at each of these layers. Networks are often also classified according to their geographical extent: local area network (LAN), metropolitan area network (MAN), wide area network (WAN) and also according to the protocols used.

Network Address — The network portion of an IP address. For a class A network, the network address is the first byte of the IP address. For a class B network, the network address is the first two bytes of the IP address. For a class C network, the network address is the first three bytes of the IP address. In each case, the remainder is the host address. In the Internet, assigned network addresses are globally unique.

Network card — See NIC.

Network Layer — The third lowest layer in the OSI seven layer model. The network layer determines routing of packets of data from sender to receiver via the data link layer and is used by the transport layer. The most common network layer protocol is IP.
**Network Transparency** — A feature of an operating system or other service which lets the user access a remote resource through a network without having to know if the resource is remote or local.

**Node** — An addressable device attached to a computer network. More often called a host.

**Null Modem** — A cable, especially an RS-232 cable, for connecting serial ports on two computers directly, rather than via modems. Since, according to the specification, both computers should transmit on pin three of their RS-232 connectors and receive on pin two, a null modem cable needs to connect one computer’s pin two to the other’s pin three and vice versa. It also needs to have male connectors at both ends (again, according to the specification).

**OSI** — Open Systems Interconnection model. A model of network architecture and a suite of protocols (a protocol stack) to implement it, developed by ISO in 1978 as a framework for international standards in heterogeneous computer network architecture. The OSI architecture is split between seven layers, from lowest to highest: 1 physical layer, 2 data link layer, 3 network layer, 4 transport layer, 5 session layer, 6 presentation layer, 7 application layer.

**OSPF** — Open shortest path first (routing algorithm)

**Optical fiber** — A plastic or glass (silicon dioxide) fiber no thicker than a human hair used to transmit information using infrared or even visible light as the carrier (usually a laser). The light beam is an electromagnetic signal with a frequency in the range of $10^{14}$ to $10^{15}$ Hertz. Optical fiber is less susceptible to external noise than other transmission media, and is cheaper to make than copper wire, but it is much more difficult to connect. Optical fibers are difficult to tamper with (to monitor or inject data in the middle of a connection), making them appropriate for secure communications. The light beams do not escape from the medium because the material used provides total internal reflection.

AT&T Bell Laboratories in the United States managed to send information at a rate of 420 Mbps, over 161.5 km through an optical fiber cable. In Japan, 445 Mbps was achieved over a shorter distance. At this rate, the entire text of the Encyclopedia Britannica could be transmitted in one second. Currently, AT&T is working on a world network to support high volume data transmission, international computer networking, electronic mail and voice communications. (A single fiber can transmit 200 million telephone conversations simultaneously.)

**PCMCIA** — Personal Computer Memory Card International Association

**PDC** — Primary Domain Controller. Logins, permissions, scripts, securities.
PVC — Permanent virtual circuit

Packet — The unit of data sent across a network. Packet is a generic term used to describe a unit of data at any layer of the OSI protocol stack, but it is most correctly used to describe application layer data units.

Packet Switching — A communications paradigm in which packets (messages or fragments of messages) are individually routed between nodes, with no previously established communication path. Packets are routed to their destination through the most expedient route (as determined by some routing algorithm). Not all packets travelling between the same two hosts, even those from a single message, will necessarily follow the same route. The destination computer reassembles the packets into their appropriate sequence. Packet switching is used to optimize the use of the bandwidth available in a network and to minimize the latency.

Peer — A unit of communications hardware or software that is on the same protocol layer of a network as another. A common way of viewing a communications link is as two protocol stacks, which are actually connected only at the very lowest (physical) layer, but can be regarded as being connected at each higher layer by virtue of the services provided by the lower layers. Peer-to-peer communication refers to these real or virtual connections between corresponding systems in each layer.

Peer-to-Peer Networks — No dedicated server or hierarchy, also called a workgroup. Usually ten or fewer workstations. Users act as their own administrator and security. Computers are in same general area. Limited growth.

Parallel — Transmission mode that sends a number of bits concurrently over separate wires.

Path — The list of directories the command interpreter searches for executables. It is stored as part of the environment in the operating system.

Physical addressing — The low level addressing scheme used on Ethernet. The 48-bit destination Ethernet address in a packet is compared with the receiving node’s Ethernet address.

Physical Layer — The lowest layer in the OSI seven layer model. It concerns electrical and mechanical connections and MAC. It is used by the data link layer. Example physical layer protocols are CSMA/CD, token ring and bus.
**Presentation Layer** — The second highest layer (layer 6) in the OSI seven layer model. Performs functions such as text compression, code or format conversion to try to smooth out differences between hosts. Allows incompatible processes in the application layer to communicate via the session layer.

**Protocol** — A set of formal rules describing how to transmit data, especially across a network. Low level protocols define the electrical and physical standards to be observed, bit- and byte-ordering and the transmission and error detection and correction of the bit stream. High level protocols deal with the data formatting, including the syntax of messages, the terminal to computer dialogue, character sets, sequencing of messages and so on.

**Protocol stack** — A layered set of protocols which work together to provide a set of network functions. Each intermediate protocol layer uses the layer below it to provide a service to the layer above. The OSI seven layer model is an attempt to provide a standard framework within which to describe protocol stacks.

**Protocol Layer** — The software and/or hardware environment of two or more communications devices or computers in which a particular network protocol operates. A network connection may be thought of as a set of more or less independent protocols, each in a different layer or level. The lowest layer governs direct host-to-host communication between the hardware at different hosts; the highest consists of user application programs. Each layer uses the layer beneath it and provides a service for the layer above.

Each networking component hardware or software on one host uses protocol appropriate to its layer to communicate with the corresponding component (its peer) on another host. Such layered protocols are sometimes known as peer-to-peer protocols. The advantages of layered protocols is that the methods of passing information from one layer to another are specified clearly as part of the protocol suite, and changes within a protocol layer are prevented from affecting the other layers. This greatly simplifies the task of designing and maintaining communication systems. Examples of layered protocols are TCP/IP’s five layer protocol stack and the OSI seven layer model.

**Protocol Analyzer** — Sniffer. Monitors and logs network activities and provides guidelines for optimizing.

**RD** — Receive Data

**RI** — Ring Indicator

**RIP** — Routing information protocol. Uses distance-vector algorithms to determine routes.
RJ11 — Modular Telephone Jack Standard-11. A six conductor modular jack that is typically wired for four conductors. One line with the two center, red and green, conductors being tip and ring.

RJ14 — Modular Telephone Jack Standard-14. Consists of two phone lines. One of the lines is the RJ11 line (the red and green conductors in the center). The second line is the second set of conductors, black and yellow, on the outside.

RJ45 — Modular Telephone Jack Standard-45. The eight-pin connector used for data transmission over standard telephone wire.

RJ48C — Modular telephone Jack Standard-48C. An eight-position keyed plug with four wires, two for transmit, two for receive. Commonly used in T1 transmission.


RS449 — EIA DB37 and DB9 interlace for DTE and DCE data interchange.

RTS — Request to Send

Reassembly — Joining back together a previously fragmented IP packet before it is passed to the transport layer. See also Fragmentation.

Redirector — All Microsoft products come with a redirector that takes a request from the computer and looks to see if it is local or sends to network.

Registry — A central database, where all hardware details, software settings and user preferences are stored.

Reliable communication — Communication where messages are guaranteed to reach their destination complete and uncorrupted and in the order they were sent. This reliability can be built on top of an unreliable protocol by adding sequencing information and some kind of checksum or cyclic redundancy check to each message or packet. If the communication fails, the sender will be notified. Transmission Control Protocol is a reliable protocol used on Ethernet.
**Repeater** — A part of an Ethernet or other network, on which all message traffic is common to all nodes, that is, it is broadcast from one node on the segment and received by all others. This is normally because the segment is a single continuous conductor, though it may include repeaters. Since all nodes share the physical medium, collision detection or some other protocol is required to determine whether a message was transmitted without interference from other nodes. The receiving node inspects the destination address of a packet to tell if it was (one of) the intended recipient(s). Communication between nodes on different segments is via one or more routers.

**Ring Topology** — Computers are connected on a single circle of cable. Each computer acts as a repeater. Failure of one computer can affect the entire network. Token passing is used in Token Ring networks. The token is passed from one computer to the next, only the computer with the token can transmit. The receiving computer strips the data from the token and sends the token back to the sending computer with an acknowledgment. After verification, the token is regenerated.

**Router** — A device which forwards packets between networks. The forwarding decision is based on network layer information and routing tables, often constructed by routing protocols.

**Routing** — The process, performed by a router, of selecting the correct interface and next hop for a packet being forwarded.

**SMDS** — Switched multi-megabit data service. Up to 34 Mbps. Same fixed-length, cell-relay technology as ATM.

**SONET** — Synchronous Optical Network. Fiber-optic cabling. 1 Gig per second.

**SQL** — Structured Query Language. Used by most databases to manipulate data.

**STP** — Shielded Twisted Pair. Twisted pair wiring, carries signal 100 meters. Has foil or braided jacket around wiring to help reduce crosstalk and to prevent electromagnetic interference.

**SVC** — Switched virtual circuit
**Segment** — A part of an Ethernet or other network, on which all message traffic is common to all nodes, that is, it is broadcast from one node on the segment and received by all others. This is normally because the segment is a single continuous conductor, though it may include repeaters. Since all nodes share the physical medium, collision detection or some other protocol is required to determine whether a message was transmitted without interference from other nodes. The receiving node inspects the destination address of a packet to tell if it was (one of) the intended recipient(s). Communication between nodes on different segments is via one or more routers.

**Serial (Port)** — A connector on a computer to which you can attach a serial line connected to peripherals which communicate using a serial (bit-stream) protocol. The most common type of serial port is a 25-pin D-type connector carrying RS-232 signals. Smaller connectors (e.g. 9-pin D-type) carrying a subset of RS-232 are often used on personal computers. The serial port is usually connected to an integrated circuit called a UART which handles the conversion between serial and parallel data.

**Server** — A computer that provides some service for other computers connected to it via a network.

**Server Based Networks** — Ten or more users. Employs specialized servers. File and Print, Application, Mail, Fax, Communications (gateways), Central administration, Greater security, Centralized backup, Data Redundancy. Supports many users.

**Session** — A lasting connection between a user (or user agent) and a peer, typically a server, usually involving the exchange of many packets between the user’s computer and the server. A session is typically implemented as a layer in a network protocol (such as Telnet or FTP).

**Session Layer** — The third highest protocol layer (layer 5) in the OSI seven-layer model. The session layer uses the transport layer to establish a connection between processes on different hosts. It handles security and creation of the session. It is used by the presentation layer.

**Share-level security** — Used in Microsoft® Windows® 95 to share resources. A password is needed to access the resource.

**Sniffer** — A network monitoring tool that can capture data packets and decode them to show protocol data.

**Star Bus Topology** — Several star topologies linked with a linear bus.

**Star Ring Topology** — Star hubs are connected using ring topology as opposed to a linear bus or a central hub.
**Star Topology** — Computers are connected by cable segments to a centralized hub. Signal travels through the hub to all other computers. Requires more cable. If hub goes down, entire network goes down. If a computer goes down, the network functions normally.

**Static Router** — Administrator manually sets up and configures routing table.

**Subnet** — A portion of a network, which may be a physically independent network segment, that shares a network address with other portions of the network and is distinguished by a subnet number. A subnet is to a network what a network is to an internet.

**Subnet Address** — The subnet portion of an IP address. In a subネットed network, the host portion of an IP address is split into a subnet portion and a host portion using an address mask (the subnet mask).

**Subnet mask** — See **Address Mask**.

**Synchronous Transmission** — Transmission in which data bits are sent at a fixed rate, with transmitter and receiver synchronized. Data going in both directions; expensive.

**T1** — 1.544 Mbps. Point-to-point, full-duplex transmission. Voice, data and video.

**T3** — 45 Mbps. Point-to-point, full-duplex transmission. Voice, data and video.

**TCP** — Transmission Control Protocol. The most common transport layer protocol used on Ethernet and the Internet. It was developed by DARPA. TCP is built on top of Internet Protocol (IP) and is nearly always seen in the combination TCP/IP (TCP over IP). It adds reliable communication, flow-control, multiplexing and connection-oriented communication. It provides full-duplex, process-to-process connections.

**TCP/IP** — Transmission Control Protocol/Internet Protocol. The de facto standard Ethernet protocols incorporated into 4.2BSD UNIX. TCP/IP was developed by DARPA for internetworking and encompasses both network layer and transport layer protocols. While TCP and IP specify two protocols at specific protocol layers, TCP/IP is often used to refer to the entire DoD protocol suite based upon these, including Telnet, FTP, UDP and RDP.

**TD** — Transmit Data

**TDR** — Time Domain Reflectometer. Sends pulses down cable. Looks for shorts or opens. Can give you area of problem.
**TERMSTR** — Pronounced “term-stir”. An environment setting used to override the default naming convention for terminals that must be used on all Aloha terminals and file servers. For example, if TERMSTR is set to TERM, then terminals must be named TERM1, TERM2, etc. Etymology: derived from old Cuban slang term for a traumatized hamster.

**Thinnet** — 10Base2. 185 meters (607 feet); 10 Mbps; BNC Connector (barrel connector, terminator); RG58 cable. 5-4-3 rule (5 segments with 4 repeaters but only 3 segments can have computers.)

**Thicknet** — Also known as **Standard Ethernet** (10base5). 500 meters (1640 feet); 10 Mbps; AUI (attachment unit interface) connector, transceivers, transceiver cables (connect to thin).

**Top-level domain** — The last and most significant component of an Internet fully qualified domain name, the part after the last ‘.’ “.”. For example, host wombat.doc.ic.ac.uk is in top-level domain **uk** (for United Kingdom).

**Topology** — Refers to the configuration of the physical media of a network.

**Transport Layer** — Host-host layer. The middle layer in the OSI seven-layer model. The transport layer determines how to use the network layer to provide a virtual error-free, point to point connection so that host A can send messages to host B and they will arrive uncorrupted and in the correct order. It establishes and dissolves connections between hosts. It is used by the session layer. An example transport layer protocol is Transmission Control Protocol (TCP).

**Transport Protocol** — Ensures error-free transmission.

**Twisted Pair** — Standard phone line made up of two insulated copper wires wrapped around each other. The twists minimize interference and attenuation.

**UNC** — Uniform (or Universal) Naming Convention. Used in IBM PC networking to completely specify a directory on a file server. The basic format is: \\servername\sharename, where **servername** is the hostname of a network file server, and **sharename** is the name of a networked or shared directory. Note this is not the same as the conventional MS-DOS C:\WIN- DOWS directory name, such as: \\server1\dave, which might be set up to point to: C:\users\homedirs\dave on a server called **server1**. It is possible to execute a program using this convention without having to specifically link a drive, by running: \\server\share\directory\program.exe The undocumented MS-DOS command, TRUENAME can be used to find out the UNC name of a file or directory on a network drive.
**UPS** — Uninterruptible Power Supply. Power supply to run a computer for a short time in case of power loss.

**UTP** — Unshielded Twisted Pair. At least two pairs of insulated twisted pair and wrapped in an outer cover.

**User-level security** — Used in Windows NT® to share resources. When you attempt to access a shared resource, the server will make sure your user account has been authorized to access the resource.

**Virtual Circuits** — Logical connections between sending and receiving computers.

**WAN** — Wide Area Network. At least two LANs or MANs connected over a great distance, sometimes even intercontinentally.

**WINS** — Windows Internet Naming Service. Used to resolve a NetBIOS computer name to an IP address. WINS supports network client and server computers running Windows and can provide name resolution for other computers with special arrangements.

**Workgroup** — A group of users in a multi-user environment who share data.
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