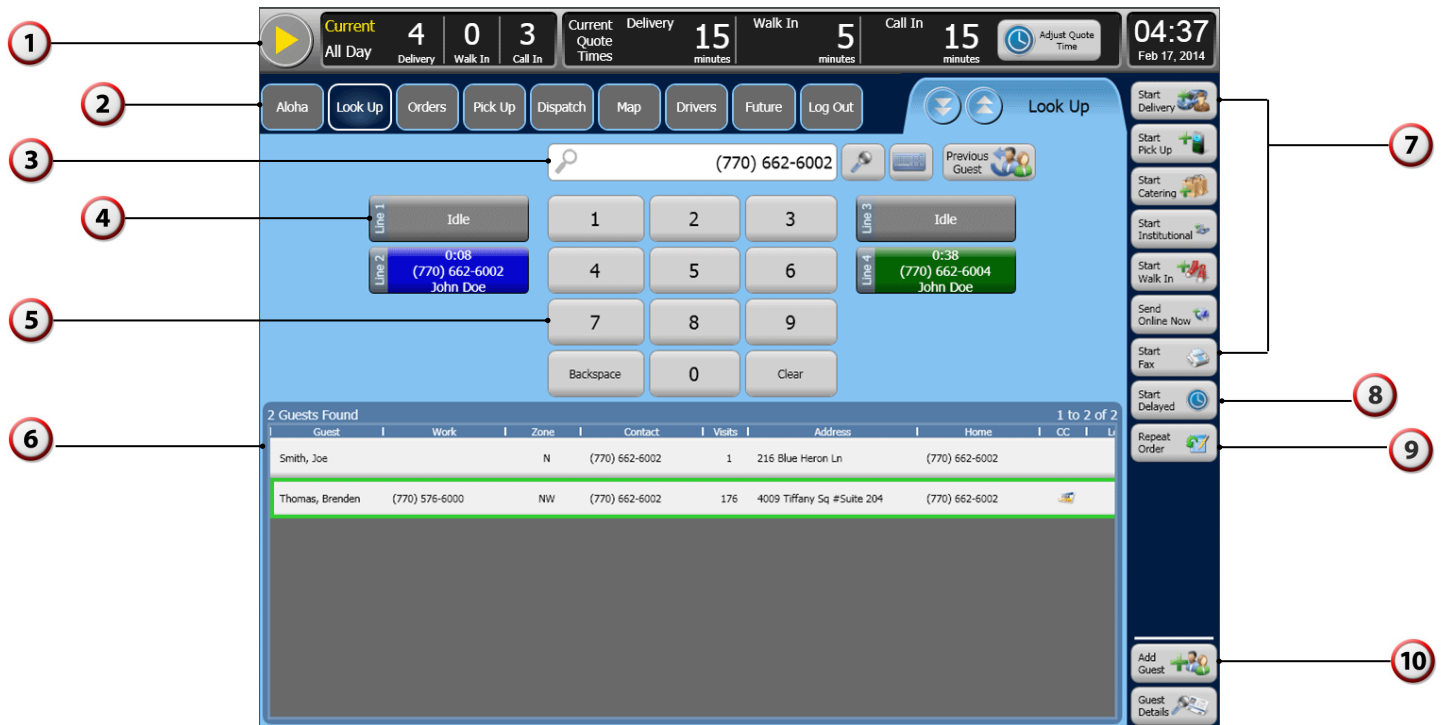


NCR Aloha Takeout

Using ATO Front-of-House

Last Updated: March 1, 2019

Aloha Takeout Look Up Screen



On the Aloha Takeout Look Up screen, you can locate existing customer records, create new customer records, select order modes for new orders, and more. Many of the components on this screen are common to other Aloha Takeout screens.

- 1 **Dashboard** — Holds general information about order promise and ready times, count by order type, and more.
- 2 **Navigation buttons** — Provide access to other Aloha Takeout screens, or the Aloha POS. Touch Log Out to exit ATO and the POS system and return to the floating logo.
- 3 **Search bar, keyboard, and related buttons** — Allows you to search for existing customers, by phone number, name, or company. Also useful for starting a new customer record. The keyboard button makes text searching easy.
- 4 **Caller ID lines** — Customer info appears as the system receives a call on a line. Touch a caller ID button to search by the phone number on the selected line.
- 5 **Number input pad** — Allows you to search for a customer by entering their phone number.
- 6 **Customer search results panel** — Lists all customers found who meet the search criteria. Columns available, and their order of appearance are customizable.
- 7 **Order mode buttons** — Select from Walk In, Delivery, Call In, or other order modes offered at your site.
- 8 **Start Delayed button** — Enables you to create an order for preparation later than the normal promise time, from a few minutes to a maximum of five years.
- 9 **Repeat Order button** — Enables you to start a new order, identical to the customer's last order.
- 10 **Add Guest and Guest Details buttons** — Enables you to add new guest records by touching Add Guest, or to edit or review existing guest records by touching Guest Details. An on-screen keyboard appears, allowing you to type customer information. Touch Tab on the keyboard to move from one text box to the next.

Using ATO Front-of-House

Map Screen

Use the Map screen to select orders and assign them to drivers for delivery, modify orders or add notes, print receipts or labels, and more.

Select one or more orders to make them active, then touch the name of an available driver to assign the orders to the driver for delivery.

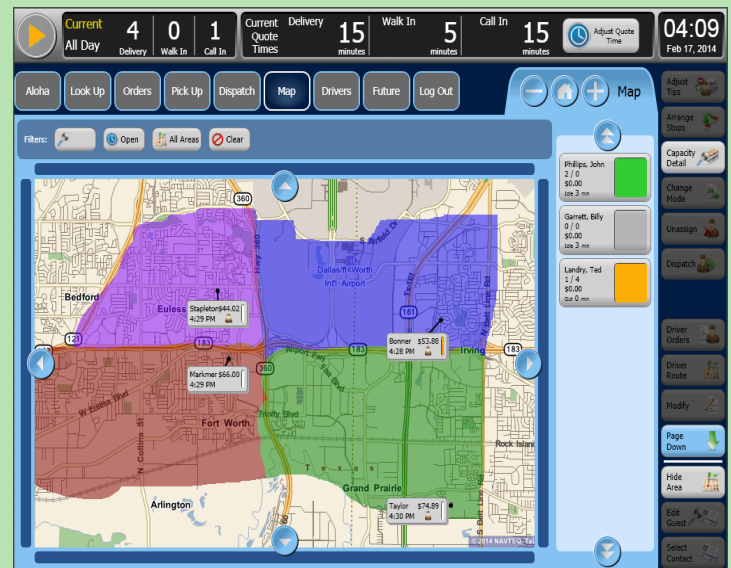
When orders assigned to a driver are ready for delivery, touch the driver assigned to the orders, and continue the process:

- Display route information, if you are using this feature. Print route information, if required.
- Print an order list and route information for the driver.
- Dispatch and return delivery drivers.



Drivers must check in to tender or modify orders. Drivers must also check in to declare or adjust tips.

Walk-in and call-in orders appear on the Pick Up screen.



Pick Up Screen

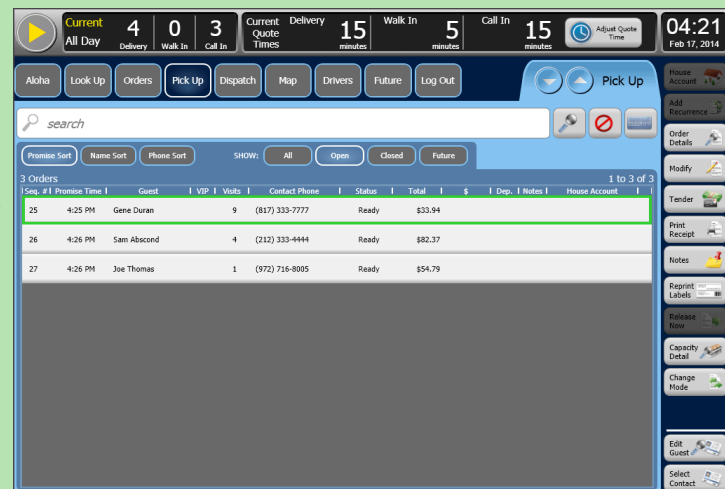
Use the Pick Up screen to select and tender walk-in and call-in orders.

When a customer arrives to pick up an order, touch the order, then touch Tender to apply a payment to close the order. The button changes to Picked Up when you select a tendered order or Apply Payment when you select an order with an un-applied credit card.



Delivery orders appears on the Map or Dispatch screen.

Delayed orders appear on the Future screen.



Drivers Screen

Use the Drivers screen to review the current status of each driver, including, but not limited to:

- Clock status, e.g. available, inactive (on break), or unavailable.
- Dispatch status.
- Number of orders in possession, and total for the day.
- Names of customers associated with the orders in hand.
- Order details.
- Amount of cash each driver is carrying.
- Driver license and insurance expiration status.
- Estimated current route time.
- Statistics on route times for the day.



Drivers with expired driver license or insurance appear in the Inactive column and require manager override to make them active..



Future Screen

Use the Future screen to schedule new orders up to several years in the future, and to perform the following, and more:

- Change the order mode.
- Modify or add notes to an existing order.
- Add, refund, or surrender deposits.
- Change the time or date for the order.
- Release the order for immediate preparation.
- Remove the order altogether.
- Use Day, Week, Month, or Customer screen views to locate existing orders, or to schedule a new order.
- Touch an appropriate time frame, to make Schedule New Order active and start the process.



Future orders can be any order mode.



Dispatch Screen

Use the Dispatch screen to select orders and assign them to drivers for delivery, modify orders or add notes, print receipts or labels, and more.

Select one or more orders to make them active, then touch the name of an available driver to assign the orders to the driver for delivery.

When orders assigned to a driver are ready for delivery, touch the name of the driver assigned to the orders, and continue the process:

- Display route information, if you are using this feature. Print route information, if required.
- Print an order list and route information for the driver.
- Dispatch and return delivery drivers.



Drivers must check in to tender or modify orders. Drivers must also check in to declare or adjust tips.

Walk-in and call-in orders appear on the Pick Up screen. Delayed orders appear on the Future screen.



Touch **Reprint Labels** to print or reprint labels for identifying and accompanying orders during transfer to customers by pickup or delivery.



Touch **Adjust Quote Time** (image shortened) to change global promise times or preparation times for orders.



Touch **Edit Guest** to change the customer phone number, or to make any last-minute changes to customer information. An on-screen keyboard appears, enabling you to type customer information. Touch the **Tab** key to



Touch **Tender** to navigate to the Aloha POS to apply a payment and close an order. This button changes to **Picked Up**, when you select a tendered order. This button changes to **Apply Payment**, when you select



Touch **Picked Up** when you hand a tendered order to the guest, to move the order to the 'Closed orders' list.



Touch **Apply Payment** to process the credit card stored with the order.

Using ATO Front-of-House

Creating Customers

We recommend you use the Express Guest Entry screen to manually add customers to Aloha Takeout.

1. Use the **number input pad** to search for a customer by phone number.
— OR —
Select a **caller ID line**.
— OR —
Touch the **keyboard** icon, then type a customer name in the 'Search' box.
2. Confirm the **search** does not match an existing customer.
3. Touch **Add Guest**. The Express Guest Entry screen appears.


4. Review and edit the **customer information**, as necessary.
 - Enter the **street address** for delivery orders.
 - Enter **vehicle information** for curbside orders.
5. Touch an **order mode** to proceed to the POS Order Entry screen and add **items** to an order, as normal.

Creating Hotel Customers

ATO supports a 'hotel' customer type to prevent creating a customer record for each hotel guest. ATO stores the name, address, and phone number information for the hotel, and prompts for occupant name and room number when starting an order for a hotel customer.

1. Complete steps **1 through 4** in the procedure, 'Creating customers,' EXCEPT enter the hotel name as the customer name.
2. Touch **Customer**.
3. Select **Hotel**.
4. Touch an **order mode**, such as Delivery. The Hotel Occupant screen appears.
5. Enter the **Hotel Guest Name** and the **Hotel Room Number**.

6. Touch **OK** to proceed to the POS Order Entry screen and add items to the check, as normal.

 *ATO does not allow storing payment card information for a hotel customer.*

Adding House Account Information

You may link Aloha Takeout customers to Aloha POS house accounts for tendering and billing.

1. Touch **Guest Details** on the Look Up screen, or **Edit Guest** on all other ATO screens.
2. Select the **House Acct** tab.
3. Touch **Select Account**.
4. Enter **search information**.
5. Touch **Search**. The Select House Account screen appears.

6. Select the **house account record** from the search results.
7. Touch **OK**.

Adding Tax Exemption Information


You may link Aloha Takeout customers to a tax exemption ID for government and non-profit orders.

1. Touch **Guest Details** on the Look Up screen, or **Edit Guest** on all other ATO screens.
2. Select the **Payment** tab.
3. Touch **Add Tax ID**.
4. Touch **Yes** to use your authorized access or enter a **manager number** to authorize entering tax exemption information.
5. Enter the **Tax Exemption ID**.
6. Touch **OK**.
7. Touch **Edit Tax ID** or **Remove Tax ID** to adjust tax exemption information. See 'Creating Tax Exempt Orders' in this guide.

Awarding a Customer Credit

You may add a credit to a customer to make amends for a service or quality issue.


1. Touch **Guest Details** on the Look Up screen, or **Edit Guest** on all other ATO screens.
2. Touch the **Payment** tab.
3. Touch **Add Credit**.
4. Type the **credit amount**.
5. Type a **note** explaining the reason for the credit.
6. Touch **OK**.

 See the 'Applying Customer Credits' section in this guide.

Creating Walk-In Orders

You may create a walk-in order, if your Aloha Takeout system is configured with this order mode.

1. Touch the **keyboard** icon to type a customer name in the 'Search' box.
2. Touch **Start Walk In**.

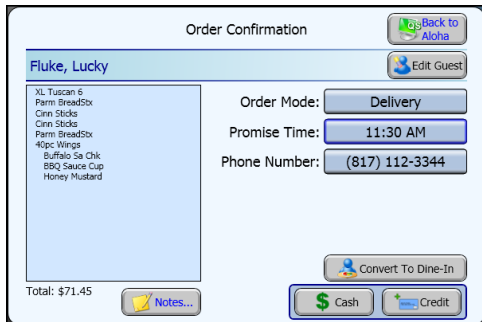
 Aloha Takeout names the order based on the characters entered in the 'Search' box.

3. Add **items** to the order in the Aloha POS.
4. Tender and close the **order**.
5. Hand the **prepared order** to the customer, when ready.
6. Touch **Picked Up**, if required, to close the order in ATO.

Creating Call-In and Delivery Orders

To ensure correct handling of each order, we recommend you begin all orders in Aloha Takeout.

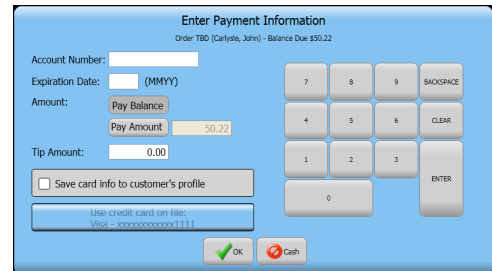
1. Touch **Start Call In** or **Start Delivery** on the right side of the Look Up screen, to immediately proceed to the Order Entry screen and start a new order.
2. Add **items** to the check in the Aloha POS.
3. Touch the appropriate **button** in the Aloha POS (varies by company), to finalize the order. The Order Confirmation screen appears.



4. Read the **order** back to the customer and, if needed, perform the following:

- Touch **Back to Aloha**, to return to the POS to make corrections or additions to the order.
 - Touch **Notes**, **Edit Guest**, **Order Mode**, or **Phone Number**, to make any necessary customer changes.
 - Touch **Promise Time**, to change the requested pickup or delivery time and create a delayed or future order.
 - Touch **Convert To Dine-In**, to change an order you have not yet sent for preparation to a dine-in order (Quick Service sites, only).
5. Touch **Cash**, if the customer is paying at pickup.
— OR —

Touch **Credit**, if the customer is providing payment card information over the phone. The Enter Payment Information screen appears.




- a. Touch **Pay Amount** to enter an amount less than the balance due of the order.
- b. Enter a **tip amount**, if applicable.
- c. Touch **Use credit card on file...** to charge the order to a stored payment card.
— OR —

Enter new **payment card information** and touch **Save card info...** to encrypt and store the new payment card info with the customer.

— OR —

Touch **Cash**, if the customer does not want to provide payment card info and decides to pay at pickup.

 The system may immediately request authorization or when you tender and close the order, depending on configuration.

Repeating Previous Orders

Use Repeat Order to create a new order identical to the last order from the customer.

1. Use the **number pad** to search for a customer by phone number.

— OR —

Select a **caller ID line**.

— OR —

Touch the **keyboard** icon, then type a customer name in the 'Search' box.

2. Select an existing **customer record**.

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3. Touch **Repeat Order**, to access the Previous Order screen.

Previous Order

Monday January 06, 2014 1:11 PM 3 items \$22.00
Tuesday December 31, 2013 1:11 PM 5 items \$22.00
Friday January 10, 2014 1:11 PM 5 items \$22.00
Monday January 06, 2014 1:11 PM 3 items \$22.00
Monday January 06, 2014 1:11 PM 3 items \$22.00
Monday January 06, 2014 1:11 PM 7 items \$22.00
Tuesday December 31, 2013 1:11 PM 5 items \$22.00

Chik Farm Sand \$6.25
Chik Farm Sand \$6.25
Chik Farm Sand \$6.25

Limes Walker
(817) 999-6623
102 Midway Dr W
Euless, TX 76039

Guest Notes: Allergies:

Order History: 01/06/2014

Item Total: \$18.75
Delivery Fee: \$2.00
Subtotal: \$20.75
Tax: \$1.31
Total: \$22.06

4. Touch a **previous order**.
5. Touch an **order mode**, to begin a new order.
6. Add or remove **items** on the check in the Aloha POS, as required.

Routing Orders to a One-Time Address

Use this procedure when a regular customer requests delivery to an address different from their home or office.

1. Create a **delivery order** for the customer, as previously defined.
2. When the Order Confirmation screen appears, touch **Address**.
3. Touch **One Time Address**.
4. Use the keyboard to type the **address**.

Edit Order Address

Address: Company:
Suite/Apt.: Delivery Zone: (Unknown)
City: Dwelling Type: Unknown
State: Postal Code: Address Notes:

Clear All X OK Cancel

! @ # \$ % ^ & * () ' , BS
Q W E R T Y U I O P 7 8 9
A S D F G H J K L ENT 4 5 6
Z X C V B N M 1 2 3
TAB < > 0 CLR

5. Touch **OK**, to return to the Order Confirmation screen.
6. Complete the **order** in the normal manner.

The system stores a one time address for the life of the order. It is not stored with the customer profile.

Changing Contact Information

Use this procedure to change the delivery address or phone contact once an order has been placed.

1. Touch **Select Contact**.
2. Touch **Use** in the 'Phone' or 'Address On File' frames to select the contact information for the current order.
— OR —
Touch **One Time Address** to enter a unique address for the order.

Select Order Address and Contact Phone Number

Current Order Phone: (770) 642-4884

Current Order Address: (Home)
Company: 4122 Tiffany Sq
Address: Suite 201
City: Alpharetta
State: GA
Postal Code: 30004
Delivery Zone: NW
Dwelling Type: Unknown
Address Notes: Blue 2 story on the left

Home: (770) 642-4884 Use
Business: (770) 676-6000 Use

Addresses On File:

Label	Dwelling Type	Address	City	State	Zip	Use
Home	Unknown	4122 Tiffany Sq Suite 201	Alpharetta	GA	30004	Use
Business	Office Building	3025 Brookside Pkwy	Alpharetta	GA	30004	Use

OK Cancel

3. Touch **OK**.

Applying a Customer Credit

You can apply a credit to an order, if the customer has an available credit.

1. Create an **order**, as previously defined.
2. Select the **order** on the Pick Up, All Orders, or Dispatch screen.
3. Touch **Order Detail**.
4. Touch **Apply Credit**, to apply the credit to the order.

The system applies a credit up to the amount of the check subtotal.

Splitting a Check

You can split a takeout or delivery check into multiple checks.

1. Create an **order**, as previously defined.
2. Split the **check** in the Aloha POS, as normal, per customer instructions.
3. Proceed through the **order process** normally.

As you move through the process, split indicators appear on the screens as follows:

Confirmation screen — The order detail panel contains a separate section for each split check.

Pick Up screen — A 'pages' image appears in the Split column, indicating the order is split into at least two checks.

Dispatch screen — A 'pages' image appears on the order button, indicating the order is split into at least two checks.

Order Detail screen — Each split check appears at the bottom of the order detail panel, with the subtotal for each on top of its image.

Reviewing Order Details

Touch an **order**, then touch **Order Detail** to access the Check Detail screen.



The Check Detail screen allows you to use any active command button to work with an order, including, but not limited to:

- Edit **customer information**.
- Modify the **order**.
- Tender the **order**.
- Assign a **pager** to a waiting customer.
- Add **notes** to the order.
- Cancel the **order**.
- Change the **promise time** for the order.
- Add **payment card information**

After making all necessary changes to the order, touch **Back** at the bottom of the command button column to return to the original screen.

Closing Orders at Pick Up

When a customer arrives to pick up an order.

1. Access the **Pick Up** screen or **Orders** screen.
2. Select the **order**.
3. Touch **Apply Payment** to tender the check with a saved payment card.
— OR —
Touch **Tender**, to proceed to the POS tender screen.
4. Tender and close **the order**.
5. Touch **Picked Up**, if available, after the customer has received their order.

Dispatching Delivery Orders

Use this procedure to create a delivery order and move it through the delivery process.

1. Access the **Dispatch** or **Map** screen.
2. Select one or more **orders**, then assign the orders by touching the name of a **driver**.

3. When orders are ready for delivery, touch the name of a **driver**, then:
 - Touch **Get Route**, to display route information, if you are using this feature. Print route information, if required.
 - Touch **Print Itinerary**, to print route information for the driver.
 - Touch **Dispatch**, when the driver departs on a delivery.
4. When a driver returns, select the **driver**, then touch **Return**.

— OR —

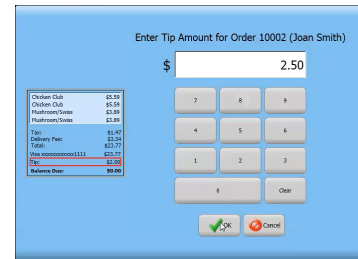
Touch **Recall**, to reverse the dispatch status.

Drivers must log in to tender or modify orders. Drivers must also log in to declare or adjust tips.

Adding a Tip for a Driver

You can add or adjust a tip for a driver once you assign the driver and the driver is logged in.

1. Access the **Drivers** screen.
2. Select the **driver** from the Active list.
3. Touch the **order** assigned to the driver and touch **Adjust Tips**.

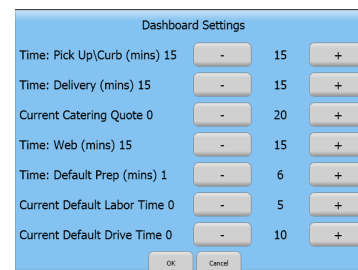


4. Enter the **tip amount** using the numeric keypad and touch **OK**.

Adjusting Quote and Prep Times

You can easily modify the default quote and preparation times in the 'Dashboard' information strip, along the top of Aloha Takeout screens.

1. Touch **Adjust Quote Time** on the Dashboard. The Dashboard Settings dialog box appears.
2. Touch the **minus (-)** and **plus (+)** buttons to change the call-in, walk-in, and delivery quote times, and the default prep time.



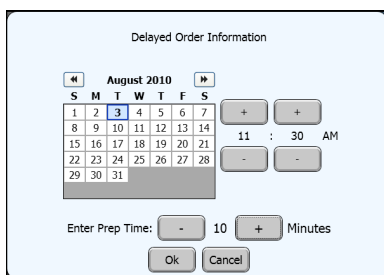
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3. Touch **OK** to save your changes, or touch **Cancel** to discard your changes and start over.


Creating Future Orders

You can create orders in Aloha Takeout for later today, next week, or up to five years in the future. Aloha Takeout automatically releases the order based on promise time less preparation time. The order appears on the Pick Up, All Orders, or Dispatch screen, when released.

1. Create a future order in one of two ways:
 - Touch **Start Delayed** on the Look Up screen, after selecting a customer record.
 - Touch **Promise Time** on the Order Confirmation screen.
2. Select an available **time slot** in the Future screen, then touch **Schedule New Order**.



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

 For large future orders, increase the preparation time to allow for on-time delivery after cooking and other preparation activities are complete.

Printing Future Order Statements

If a customer wants a statement detailing their future day order, touch **Order Details** on the command panel, along the right side of the screen.

Touch **Print Statement** to print a statement with prices.

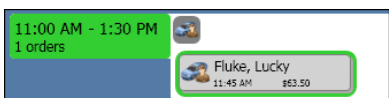
— OR —

Touch **Print Chit** to print a statement without prices.

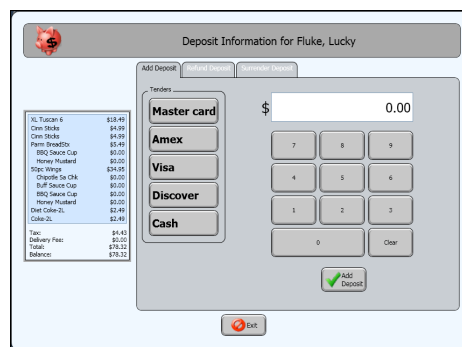
Accepting Deposits

You can use the Deposits feature to collect partial or full payment from customers for a future day order.

1. Touch **Future** to access the Future screen.
2. Select an **order** in the Future screen.



3. Touch **Add Deposits**. The Deposit Information screen appears.



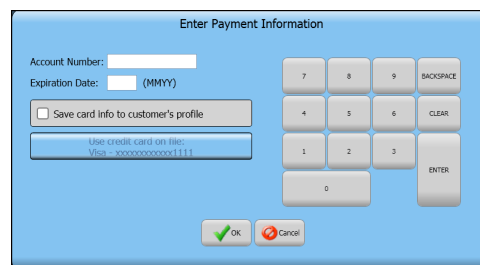
4. Enter the **deposit value**, using the number pad.
5. Touch the **tender type** the customer is using to pay for the deposit.
6. Touch **Add Deposit**.

If you select **Cash**, the deposit appears on the check on the left side of the Deposit Information screen. You are accountable for this amount in your checkout.

— OR —

If you select a **payment card**, the Enter Payment Information screen appears.

- a. Enter the **card information**, or touch **Use credit card on file**, if the card information is already present.



- b. Touch **Save card info to customer's profile**, to encrypt and store new card information in the customer profile, then touch **OK**.
 - c. When approved, the deposit appears on the check on the left side of the Deposit Information screen.
7. Touch **Exit** to close the Deposit Information screen.

Applying Deposits

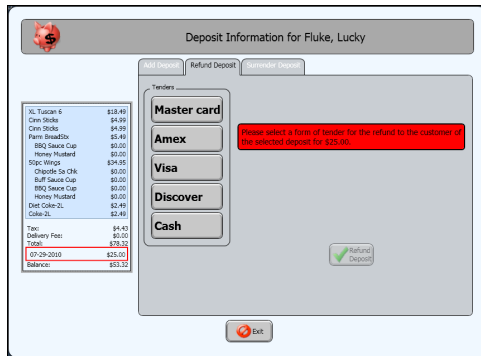
When the customer arrives to pick up their order, or when it is assigned to a driver, you must apply any deposits to the order before performing other functions.

1. Select the **order**.
2. Touch **Apply Payment**. A confirmation message appears.
3. Tender any **remaining balance**, then close the **order**, as normal.

Refunding/Surrendering Deposits

You can refund or surrender deposits, as required, if a customer decides to cancel or no show an order containing a deposit.

1. Access the **Future** screen.
2. Select an **order** containing a deposit.
3. Touch **Add/Edit Deposits**. The Deposit Information screen appears.



4. Select the **deposit line** in the order summary panel.
5. Touch the **Refund Deposit** or **Surrender Deposit** tab near the top of the screen.
If refunding a deposit, touch the appropriate **tender** to use for the refund. In most cases this will match the tender used to pay for the deposit.
6. Touch **Refund Deposit**, to return the deposit amount to the customer and mark it as refunded.
— OR —
Touch **Surrender Deposit**, to mark the deposit as surrendered to the store.



The system tenders surrendered deposits to the 'Deposit' tender.

7. Obtain **manager assistance**, if prompted.