Aloha POS
Enhancement Release v6.0
For v5.3 Users

The v6.0 release not only introduces new features, but focuses on the very strategic effort of merging our domestic and international code bases into a single, very stable, and extremely feature rich release - for all Aloha POS users. In some instances, we combine features together in this document to better explain the new enhancements. When applicable, we include a scenario, how to configure the feature in the Back-of-House (BOH), how to use the feature in the Front-of-House (FOH). This document is not intended to fully explain a particular function or other options available or surrounding the function.

Am I A v5.3 User?

An Aloha v5.3 user refers to a customer who is currently on the v5.3 branch of the Aloha software. When you upgrade to v6.0, you receive enhancements that were implemented in all branches of the Aloha software, including the v5.4 features, which were aimed at, but not limited to, International customers.

What Operating Systems Does This Version Of Aloha Support?

If you are using Microsoft® Windows© 2000 or later, the operating system satisfies these two prerequisites if all service packs and security patches are up to date.

If you are using an older version of Windows, you may need to install the latest appropriate version of Microsoft Internet Explorer, available on the Aloha installation CD, to satisfy all prerequisites. If you are using Windows 95, the latest version of Internet Explorer you can install is v5.5. Later versions of Windows accept Internet Explorer v6.0, but you must install all of the latest service packs and security patches, as they become available.

You may also need to install DCOM98 v1.3, if you are not already at this version, prior to installing Aloha v6.0 or higher.
Remote File Storage

Beginning with version 6.0, you can configure the Aloha system to use Remote File Storage, a more secure method of communication between the Front-of-House and Back-of-House computers, that does not rely on Windows file sharing. 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.

Aloha Fingerprint Scanner

All models of the Radiant P1220 terminals have a fingerprint scanner integrated into them. The Aloha system supports clock-in and log-in operations on the fingerprint scanner, in addition to accepting inputs to satisfy requests for the ‘manager password.’ You can require employees to clock in and log in to the FOH terminals using the fingerprint scanner, thus enhancing the security of physical access to the terminals. If you are currently using magnetic stripe cards to access FOH terminals, you can continue to use them in conjunction with the fingerprint scanner.

128-Bit Encryption

The Aloha system now supports 128-bit encryption, as implemented in the operating system. If your operating system does not include 128-bit encryption, you must install the latest appropriate version of Microsoft Internet Explorer to upgrade the encryption level. The proprietary 64-bit encryption formerly in use in the Aloha system is no longer operative, beginning with version 6.0, although limited backward compatibility is still available. You can regrind older subdirectories, as required, if you need access to the data in them.

Public Cash Drawers in QuickService

Normally, for TableService operations you can assign a maximum of five employees to a cash drawer, and for QuickService operations, you can assign only one employee to a cash drawer. The Public Cash Drawer feature provides the flexibility of allowing an unlimited number of employees to perform transactions from the same ‘public’ cash drawer, as long as they are not specifically assigned to a particular cash drawer. It can be further defined to state the employees who have already accessed a public cash drawer in one revenue center during their shift, cannot access another public cash drawer in any other revenue center.
**Rapid Access Login for QuickService**

The Rapid Access Login feature enhances the speed of service in fast environments, such as a bar, and enables multiple employees to log in to a terminal without having to log one employee off and log another employee on. This reduces the number of screen touches you perform when logging in, and eliminates the need for configuring a generic login ID for multiple employees to use and maintain fast service. You can also swipe your mag card across a reader to log off the current employee and access the drawer. When using Rapid Access Login in a TableService environment, you can assign up to five employees to a drawer and still retain cash accountability, or you can make the drawer public. Additionally you can enable auto-ordering, which orders all unordered items when another employee logs in or the screen times out.

**Bartender Scenario:** The Radiant Sports Bar has several bartenders clocked in and operating from the same terminal in a busy environment. One bartender enters orders under their ID number, and presses Done. The Rapid Access Login screen appears with the list of employees eligible to log in. Another bartender selects their name from the list, or swipes their mag card across the reader, to log in and ring orders under their ID number.

In a QuickService environment, use this feature when you have floating cashiers using the same cash drawer. You must make the drawer public to use Rapid Access Login in QuickService, and you lose cash accountability.

**Cashier Scenario:** A lunch counter has floating cashiers clocked in and operating from the same terminal. One cashier enters orders under their ID number, and presses Done. The Rapid Access Login screen appears with the list of employees eligible to log in. Another cashier selects their name from the list or swipes their mag card across the reader, to log in and ring orders under their ID number.

**International Coins for Reconciliation Screens**

In the Drawer and Employee Reconciliation features, the Coin Counts screen accepts only coins from the American dollar market. You can now customize the screen to include any coin currencies accepted at your location, such as the pound, looney, and others.
Clock-In Movie

With the Clock-In Movie feature, the POS system can automatically play a video to 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.

**Scenario:** To reduce labor and training costs, you configure the POS system to require your employees to watch an instructional movie when they clock in. You configure the system to show a food preparation movie when an employee on the kitchen staff clocks in, and a speed of service movie when a server clocks in. You regulate the viewing of the movie by disabling the feature for employees who clock in during the busy hours of 11:00 a.m. to 2:00 p.m. When an employee finishes watching the movie, they log off the terminal and begin their regular job functions.

Survey Code to Indicate New Employees

The Customer Survey feature provides 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.

The benefits of the Customer Survey feature include:

- You can improve your client base, through guest feedback, with minimal effort and labor.
- You can print an eye-catching banner for guests to notice and read at the bottom of the guest check.
- You can print the survey in intervals, for selected guests, to reduce paper waste and cost.
- You can print an indication in the survey code that reflects whether or not the employee providing service is experienced.
Expanding Functionality for Quick Combos

To accommodate QuickService restaurants that need extra flexibility with quick combo promotions, you can now configure up to 10 components and two upsell levels. Prior to this enhancement, the system allowed only five components, however, with the makeup of some menus that offer several choices to complete a quick combo, additional Component drop-down lists now appear in the Promotions - Quick Combo dialog boxes.

A very common feature for QuickService restaurants is multiple upsell levels that allow the guest a choice to upsize their quick combos to larger portions and raise the total of the guest check. To accommodate most menus, you can configure a button for each upsell level or configure an increment and decrement button that cycle through the upsell levels until the check reflects the correct level.

**Single Button For Each Level Scenario:** A quick combo includes a medium fries and drink with the option to upgrade to Large (Upsell #1) and Super-Large (Upsell #2). Touch the Large button to upgrade to a large fries and drink. Touch the Super-Large button to upgrade to a super-large fries and drink. If you touch the wrong button or a guest changes their mind, touch the appropriate button to apply the correct upsell level. The portion size and its associated price change accordingly.

**Increment And Decrement Buttons Scenario:** A quick combo includes a medium fries and drink with the option to upgrade to Large (Upsell #1) and Super-Large (Upsell #2). Touch the increment button to upgrade to a large fries and drink. Touch the increment button again to upgrade to a super-large fries and drink. If you touch the wrong button or a guest changes their mind, touch the decrement button to downsize back to the Large (Upsell #1). Touch the decrement button again to downgrade to a regular quick combo. The portion size and its associated price change accordingly.

**Quantity by Category Flex Tax Type**

Flex taxes enable tax on items that require conditional taxation for a variety of circumstances. The Aloha system currently applies flex tax methods when you meet one of the following conditions:
- **Always** — Applies to all items on the check.
- **Quantity** — Applies to a specific quantity of items on a check.
- **Subtotal** — Applies to a specific subtotal value of items ordered.
- **Category** — Applies to a specific category of items ordered.

You can now configure another condition for applying a flex tax to an item.

**Quantity by Category** — Applies to items based on the quantity of ordered items from a specific category. This supports scenarios where items from a category are taxed at a specific tax rate until the quantity of the items ordered reaches a certain number. For example, a ‘Baked Goods’ category includes donuts, muffins, cookies, and bagels. When a combination of any of these items reaches a specific number, the condition is met and the flex tax is applied. As with all flex taxes, the items are deferred to another taxation when the condition fails.
Quantity by Category Flex Tax Type

To configure a flex tax to meet a certain scenario, you must set up several requirements in the database, based on the taxation regulations enforced by either the state, region, or country. The configuration of flex taxes in the Aloha system utilizes several flex taxes; one used as the ‘parent’ flex tax that is subject to conditions, and links to a ‘child’ flex tax if the condition succeeds, and a ‘child’ flex tax if the condition fails.

The goal of the concept is to end in an ‘Always’ state to resolve the final taxation.

Scenario: A tax regulation is enforced where a primary tax is applied to the check when you order up to two donuts, however, if you order another donut, or another qualifying item such as a coffee, the purchase becomes a meal, and therefore is non-taxable. This scenario can be reversed depending on the region in which you reside.

With the given scenario, you can order up to the defined number of required items from the specified category to produce a successful scenario, and the system applies a tax. If you order more than the defined number, a failed scenario occurs and the items become non-taxable.

Delphi Order Confirmation Display Boards

The Aloha system now supports the Delphi order confirmation display board. The functionality for Delphi is identical to the AccuView display board and appears as an option in the ‘Display Type’ drop-down list in Maintenance > Hardware > Display Boards. You can also perform reroutes with Delphi, either manually or via an event.

Global Payments via TCP/IP

You can now configure the Global Payments processor, formerly known as NDC, to connect through a TCP/IP connection, which provides a continuous and more reliable connectivity between the merchant and the processor. If you configure the processor to connect with both TCP/IP and dialup, the system connects through TCP/IP, then rolls over to a dialup connection.

FOH Drawer Reconciliation

The Drawer Reconciliation function is an enhancement to the checkout function and provides a simple, automated method for reconciling a cash drawer before you close it, no matter how many employees use the drawer. The difference between the entered amounts and the system-calculated amounts must be within the specified requirements prior to the completion of a drawer reconciliation. If the reconciliation exceeds a specified number of checkout attempts, a message displays and an employee with sufficient access must approve it to complete the reconciliation.

Additionally, you can enable the system to automatically transfer the reconciled amount as a deposit in the BOH. This automates deposit entries and eliminates the chance of entering the wrong amount in Functions > Edit Deposits.
Restricting Clock-Outs Past Their Scheduled Time

It is common for employees to not clock out at their expected scheduled time and ‘ride’ the clock. You can now enable the system to require manager approval when an employee attempts to clock out a specified number of minutes after the end of a scheduled shift, which allows you to better control your labor costs.

Scenario: A manager schedules an employee to work from 5:00 p.m. to 10:00 p.m and configures the system to require a manager approval if the employee attempts to clock out 30 minutes past their shift. The employee tries to clock out at 11:00 p.m., either by forgetting to clock out or intentionally ‘riding’ the clock. The system displays the Manager Approval screen, making the manager aware the employee is clocking out late. If needed, the manager can adjust the clock-out time for the employee.

House Accounts in SuperSites

The Aloha system now supports house account functionality in SuperSite installations, including house account credit limits and balance information between stores. For example, you can use house accounts in a theme park that wants to allow an executive the ability to purchase items at any location within the park and charge the sales to a VIP account. When the Aloha system performs a grind, the sales generated from all stores for the account are consolidated into one total balance.

When posting a payment to a house account in SuperSite mode, you must now select the store prior to clicking OK in the Post Payment to House Account function.

Maryland State Tax on Gratuities

According to the regulations imposed by the state of Maryland, a tip amount is taxable if it meets the following conditions:

- The check contains a mandatory gratuity or service charge, representing a tip.
- The party has 10 or more people at the table.

To accommodate this requirement, the Aloha system now allows you to tax automatic gratuities when the number of guests meets or exceeds a specified number. You can configure the tax as specified to one or more revenue centers, or you can make it a global tax for the entire store. The system adheres to the following hierarchy for gratuities:

- Gratuity by revenue center.
- Gratuity by store (Store Settings).

Increasing Number of PMS Sales Categories

The Aloha system now supports up to 16 PMS sales categories, when interfacing with a property management system (PMS). The previous number of categories was four.
Sending Modifiers to Order Confirmation Boards as Entered

The Aloha system now displays modifiers on the order confirmation board as you enter them on the check. This is a functional change and does not require any configuration. This new functionality provides a guest more time to confirm an order in a drive-thru environment, especially when an item is heavily modified, thereby enforcing the main benefit of using an order confirmation board. When you clear an order or delete a modifier before it is ordered, the modifier disappears from the order confirmation board.

Consolidating Items on an OCD

When using the AccuOrder 360, AccuVIEW, or Delphi order confirmation boards (OCD), you can now consolidate items on the display to reduce scrolling through lengthy orders. The PCD101 and Everbrite order confirmation boards do not support this functionality.

Fifth Third Bank Gift Cards

The Aloha system now supports Fifth Third Bank gift cards using the Fifth Third Bank processor. With these gift cards you can do the following:

- Force employees to use magnetic stripe cards.
- Support overpayment amounts when redeeming with a gift card.
- Sell multiple gift cards at one time.
- Sell predenominated gift cards.
- Perform a FOH query balance on a gift card.
- Use Aloha EDC to transmit information to the gift card host.
- Add a tip as a second request to the host during redemption using pre-authorization.

Increasing Digits for House Accounts

The Aloha system now supports up to eight digits for identifying a house account record. The previous number of digits was five. You can have a maximum of 10,000 house account records defined in the system.
**Coupon Audit Count**

The Coupon Audit Count function is an enhancement to the checkout function and provides a simple, automated method for counting your coupons you receive.

Benefits of the Coupon Audit Count feature:
- You can define the number of reconciliation attempts allowed before requiring a manager to intervene.
- You can define the variance allowed for all or each coupon.
- You can require a coupon audit count by job code, cash drawer, or individual coupons.

The difference between the entered totals and the system-calculated totals must be within the specified requirements prior to the completion of a coupon audit count. If the reconciliation exceeds a specified number of checkout attempts, a message displays and an employee with sufficient access must approve it to complete the reconciliation.

**Drawer Checkout in QuickService**

Typically, in a quick-service establishment, you assign a cashier to a specific cash drawer, or bank, at the beginning of their shift, to handle their cashier transactions. When the shift ends, the cashier runs a checkout report that details the cashier transactions that occurred during their shift. They either switch out the drawer, or count down the starting bank, and then use the Checkout report to balance the drawer.

However, some quick-service establishments allow consecutive shifts to use the same cash drawer, without switching out the drawer or counting down the starting bank between shifts. Instead, these establishments balance the entire cash drawer at the end of the day, because doing so decreases the amount of time between shift changes, which ultimately increases their ability to provide quicker service. Establishments that operate in this manner can use the Drawer Checkout report to balance the entire drawer at the end of the day.

**Operational Scenario:** A restaurant wants an account of all activity for a cash drawer in which several employees from multiple shifts shared the drawer. Each employee runs and completes a standard checkout at the end of their shift, however, they do not switch out the drawer or count down a starting bank. Before the End-of-Day occurs, the manager runs the Drawer Checkout report to balance the drawer and reset the drawer totals.
Check Amount on Video Cells

You can now configure the system to display the check amount, with taxes and discounts included, at the bottom of the video cell or after each order when using variable cell lengths. This feature accommodates managers who often work the cook line and want to be cognizant of all details of the order.

The system adds the check total when you start a new order, using the following rules:

- The total updates automatically and includes any modifications made to the check, such as taxes, gratuity, comps, promos, surcharges, voids, and order mode charges.
- When items overflow into the next cell, the check total appears in the last cell.
- When the check has a $0.00 total, the check total has a blank value.
- For TableService operations, if you also have ‘Show Total on Order Entry Screen’ selected in Maintenance > Store Settings > Security group > POS Security tab, the check total appears after you order the check, rather than as you order each item.
- For QuickService operations, if you also have ‘No Total Lines on Unordered Checks’ selected in Maintenance > Store Settings > User Interface group > POS tab, the check total does not appear on the video screen.

Six-Digit American Express Authorization Code

To comply with the regulation imposed by the American Express credit card company, the Aloha system now supports an authorization code for up to six digits.

The following is a statement submitted by Heartland Service Center (HSC):

“Up until September of 2003, American Express has cross-referenced the two-digit codes they received to the six-digit code. After that date they have randomly audited merchants and issued chargebacks for those merchants still settling with a two-digit code. If a merchant contacts HSC regarding this type of chargeback, the service center will conference in the American Express chargeback department and they will reverse the chargeback. American Express is being lenient on this issue until the software vendors become compliant on this issue. The merchant can contact the Amex chargeback department at 800-528-5200 > option 2 > option 1.”
Scanning a Quick Combo in Reverse Order

Typically, when you apply a Quick Combo promotion, the system scans for the required components in the order you enter the items. This could give you undesired results. You can now enable the system to scan a Quick Combo promotion in reverse order from the last required component to the first.

Scenario: You want to apply a Quick Combo for the third guest, who orders the required components for the combo, while the first two guests do not. You enter the following items, in order, for three guests:

- Guest 1: BBQ Burger, French Fries, Water
- Guest 2: Hamburger, Coke
- Guest 3: BBQ Burger, French Fries, Coke

Currently, the system scans from top to bottom and selects BBQ Burger, French Fries, and the first Coke as the combo, therefore, applying the quick combo price to the wrong items. With the new configuration, the system scans from the bottom to top, and applies the promotion to Guest 3.

Net Sales by Category in Custom Checkout

You can now configure the Aloha custom checkout to include net sales in the breakdown for all categories, or for a specific category.