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About NCR Aloha Takeout Future Orders

Feature Name at a Glance

<table>
<thead>
<tr>
<th>Core Product</th>
<th>NCR Aloha Quick Service, NCR Table Service</th>
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<tr>
<td>Complementary Products</td>
<td>NCR Aloha Takeout</td>
</tr>
<tr>
<td>Separate License Required?</td>
<td>Takeout — Aloha Takeout requires a separate license.</td>
</tr>
<tr>
<td></td>
<td>Delivery — The Delivery component of Aloha Takeout requires a separate license from Aloha Delivery/Frequent Buyer (D/FB), which is included as part of the Aloha Takeout license. It is not necessary to actually install D/FB.</td>
</tr>
<tr>
<td></td>
<td>Mapping — A separate license is also required for the mapping module, if you elect to install it.</td>
</tr>
<tr>
<td>Other References</td>
<td>NCR Aloha Takeout Reference Guide, and NCR Aloha Takeout Reports Guide</td>
</tr>
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</table>

The ability to accept future orders can be an important part of your business. This guide discusses how to configure and use future orders in Aloha Takeout, which allows you to accept, schedule, and manage orders for up to five years in advance. You can control how you manage and release future orders to the kitchen, and you can accept deposits from customers to prepay part or all of a future order, to cover labor and food costs in the event a customer abandons an order.

Aloha Takeout also allows you to accept and schedule recurring orders, referred to as “patterns,” to establish and manage these orders. With Aloha Takeout, it is easy to respond to customer requests to change the items and quantities within a recurring order, change the date of an individual order, change the frequency of the recurrence, and even cancel the recurring order.
Configuring Future Orders

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

Steps at a Glance:

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


2. Establish the method for the release of future orders. See page 5.

   a. Select Maintenance > System Settings > Void Reasons to create void reasons for future and canceled orders. ATO requires a future order void reason for when a future order becomes an active order and is removed from the SQL database by the system. A cancel void reason is for when a customer cancels an ATO order.
   b. Select Maintenance > Labor > POS Access Levels to configure which access levels can cancel future orders.

   a. Select Maintenance > Menu > Items > Items tab to create Deposit and Deposit Surrender items.
   b. Select Maintenance > Payments > Tenders > Tender tab to create a deposit tender.
   c. Select Maintenance > Takeout Configuration > Takeout Settings > Tenders tab to specify a POS tender as ‘Available for deposits.’ It is necessary to do this for all tenders you can use when accepting a deposit.
   d. While still in Takeout Settings, select the Deposits tab to enable and configure deposits for future orders.
   e. Select Maintenance > Labor > POS Access Levels to configure which access levels can authorize the refund or surrender of a deposit.

5. Select Maintenance > Takeout Configuration > Takeout Settings > Options tab to enable recurring orders. See page 17.

6. Access Utilities > POS > Refresh POS & All Installed Products to update the information on the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you.
Enabling Future Orders

To accept and schedule orders in advance, it is necessary to enable the Future Orders feature. Once enabled, a Start Delayed button appears on the right side of Look Up screen, from which you enter and release one-time future orders.

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

2. Under the ‘Future orders’ group bar, select Enable future day orders.

3. Select Activate future orders via server so that you can release future orders from the back-of-house without the need for an ATO instance running on a front-of-house terminal. To work properly, it is necessary to configure the ATO service to start an instance of the Aloha POS on the BOH system.

4. Click Save and continue to the next procedure.

Establishing the Method for Releasing Future Orders

You also need to establish how to manage and release future orders to the kitchen for preparation. Aloha Takeout provides a number of ways for which you to configure the release of future orders for your operation. This section only discusses the following three operational scenarios:

- **Method 1**: Aloha Takeout controls the release of an order for preparation based on promise and prep time. For delivery orders, you can also include delivery time in the calculation.
- **Method 2**: You, or someone on your staff, manually controls the release of an order and the kitchen staff begins preparation based on the promise time printed on the chit.
- **Method 3**: The customer controls the release of an order for preparation based on arrival time, either using a beacon or a check-in process.

### Recommended Configuration in Takeout Settings:

<table>
<thead>
<tr>
<th>Method 1: ATO Controls</th>
<th>Method 2: Staff Controls</th>
<th>Method 3: Customer Controls</th>
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</thead>
<tbody>
<tr>
<td><strong>Auto release future orders</strong></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Release on check in</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Also configure Check In button and optional check-in chit printing.</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td><strong>Release call-in orders based on preparation time</strong></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Release current day future orders immediately</strong></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Requires setting a start time.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Enable order release window restriction</strong></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Requires configuring a time window.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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ATO Future Orders FFG

Page 5
Method 1: Configuring ATO Control of Order Release

Configure ATO to control order release when you want the system to release each future order based on the promise and prep time for the order. In the case of an early arrival, you can use a Check In button to notify the kitchen staff without actually releasing the order. The kitchen staff determines if they can prepare the order in advance of the promise time and then you need to use the Release Now button to release the order.

_SCENARIO:_ If the promise time of an order is 12:30 p.m. with a prep time of 10 minutes, ATO automatically releases the Call In order at 12:20 p.m.

If this is an order for delivery, and the default delivery time is 20 minutes, ATO automatically releases the order at 12:00 p.m.

To allow ATO to control order release time:

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the ‘Future orders’ group bar, select **Auto release future orders**.
3. Clear **Release on check in**.
5. Clear **Release current day future orders immediately**.
6. Select **Enable order release window restriction**. When selected, this option controls the time frame during which the system can release future orders to the kitchen.
7. Enter a _start time_ that is after the ATO end-of-day routine runs and the kitchen staff is ready to prepare orders.
8. Enter an _end time_ that is before the ATO end-of-day routine runs and the kitchen is closed or no longer able to prepare orders. Orders scheduled to release after the end time release at the start time on the following day.
9. Click **Save** and continue with the _next procedure_.

To set the default drive time quote for operations that offer delivery:

1. In Takeout Settings on the Options tab, under the ‘Delivery’ group bar, select **Enable drive time**.
2. Click **Save**.
3. Select the **Panel Options** tab, then select the **Info Bar** tab.

![Figure 2 Elements group bar Default Drive Time](image)
4. Under the ‘Elements’ group bar, click the Add drop-down arrow, select Default Drive Time as the Element type, and click OK. This element adds the drive time quote to the Dashboard Settings screen, which allows you to enter and adjust a quote time throughout the day. If you want to reset the drive time quote to a default value during the end of day, continue to step 5; otherwise, continue to step 7.

5. Under the ‘Metrics’ group bar, click the Add drop-down arrow, select Default Drive Time as the Metric type, and click OK.

6. In ‘Reset at EOD value (in minutes),’ enter the minutes for your default drive time.

7. Click Save and continue to the next procedure.

To provide the ability to adjust the delivery drive time quote:

1. Select Maintenance > Labor > POS Access Levels.
2. Select an access level from the drop-down list.
3. Under the ‘Aloha Takeout’ group bar, select Can adjust quote time.
4. Click Save.
5. Repeat this procedure for each access level that can adjust the delivery drive time quote.
6. Exit the POS Access Levels function.
Method 2: Configuring Staff Control of Order Release

Configure ATO so that you, or someone on your staff, manually release future orders when received or well in advance of the promise time. The kitchen staff uses the promise time printed on the kitchen chit to time and prepare orders, as necessary.

SCENARIO: You arrive in the morning and select all future orders due for the next meal period or for the entire day, then touch Release Now. The system prints the orders to the kitchen with the promise time on the chit. Your kitchen staff organizes the orders and times the preparation accordingly. Repeat this procedure for new orders you receive throughout the day.

To allow staff control of order release:

1. Select Maintenance > Takeout Configuration > Takeout Settings > Options tab.
5. Select Release current day future orders immediately. You must select a start time for orders to begin releasing to the kitchen so that your kitchen staff can manage the timing of the preparation of the orders.
6. Clear Enable order release window restriction.
7. Click Save and continue to the next procedure.

To enable the selection of multiple orders:

1. In Takeout Settings on the Panel Options tab, select the Future tab.
2. Under the ‘Settings’ group bar, select Enable multi-selection to allow the selection of multiple future orders for release when you touch Release Now.
3. Under the ‘Actions’ group bar, click the Add drop-down arrow, select Release Now as the Action type, and click OK.
4. Click Save.

Method 3: Configuring Customer Control of Order Release

Configure ATO so that orders do not release for preparation until a customer arrives and checks in. Add a Check In button to as many ATO FOH screens as you want. This button appears with other action buttons on the right side of the screen and allows you to notify the kitchen when a customer who placed a future order arrives at your restaurant. If you want a check-in chit to print, it is necessary to configure check-in chit printing.

SCENARIO: A customer calls in, places an order, and states they will arrive at your restaurant in an hour. When the customer arrives, use the Check In button to release the order to the kitchen for preparation.

To allow customer control of order release:

1. Select Maintenance > Takeout Configuration > Takeout Settings > Options tab.
3. Select Release on check in. Selecting this option holds the release of a future order for preparation until a customer arrives and checks in.
5. Clear Release current day future orders immediately.
6. Clear Enable order release window restriction.
7. Click Save.
To add the Check In button to the ATO FOH:

1. In Takeout Settings on the Panel Options tab, select the tab that correlates to the screen on which you want the Check In button to appear. You can add the Check In button to more than one ATO FOH screen.
2. Under the ‘Actions’ group bar, click the Add drop-down arrow, select Check In as the Action type, and click OK.
3. Use Move up and Move down to rearrange action buttons in the selected list and customize the order in which they appear on the ATO FOH screen.
4. Click Save.
5. Repeat for each tab on which to add a Check In button.

To configure the check in chit printer:

1. In Takeout Settings on the Printing tab, under the ‘Check in printing’ group bar, select Enable check in chit printing.

2. Under the ‘Check in chit printer’ group bar, select the desired printer in the ‘Available’ list box and use the right arrows to move it to the ‘Included’ list box. Conversely, to remove a printer, select the printer in the ‘Included’ list box and use the left arrows to move it to the ‘Available’ list box.
3. Click Save.

Figure 4 Check In chit printing
Creating Void Reasons for Future and Canceled Orders

Aloha Takeout requires two void reasons: Future Order and Canceled Order.

- When you add a future order to the system, ATO stores the order detail in a SQL database until the time at which you release the order. An order becomes an active POS order at the time of its release and is removed from the SQL database using the Future Order void reason.
- When a customer calls to cancel an order, ATO uses the Canceled Order void reason to void the check. You determine if the Canceled Order void reason affects inventory or not, based on if you can prevent the items from being prepared or can reuse the items, or if you typically prepare and waste the items as a result of a canceled order.

If you remove an order from Aloha Takeout prior to its release, there is no impact to your inventory.

To create the ATO void reasons:

2. Click New to create a new void reason.
3. Type a name, such as Future Order, in ’Description.’

4. Select or clear Return voided items back to inventory based on the following criteria:
   - For the Future Order void reason, clear Return voided items back to inventory, as these items are not ordered.
   - OR —
   - For the Canceled Order void reason, select Return voided items back to inventory, if you can prevent the items from being prepared or can reuse the items; clear Return voided items back to inventory, if you typically prepare and waste the items as a result of a canceled order.
5. Select **For Aloha Connect Use Only** for both void reasons, to prevent these void reasons from appearing on the Aloha POS FOH void screen. This prevents the mis-use of the void reason by managers.

6. Select or clear **Do Not Report** based on the following criteria:
   - For the Future Order void reason, select **Do Not Report**.
   - OR -
   - For the Canceled Order void reason, clear **Do Not Report**.

7. Click **Save** and exit the **Void Reasons** function.

To associate the new void reasons with Aloha Takeout:

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

   ![Figure 7 Order Cancel Void Reason](image)

   **Figure 7** Order Cancel Void Reason

   2. Under the ‘Settings’ group bar, select the **void reason** you created for canceled orders from the ‘Order cancel void reason’ drop-down list.

   ![Figure 8 Future Order Void Reason](image)

   **Figure 8** Future Order Void Reason

   3. Under the ‘Future orders’ group bar, select the **void reason** you created for future orders from the ‘Future order void reason’ drop-down list.

   4. Click **Save**.

To provide the ability to cancel future orders:

1. Select **Maintenance > Labor > POS Access Levels**.
2. Select an **access level** from the ‘POS Access Level’ drop-down list.
3. Under the ‘Financial’ group bar, select **Void items**.
4. Click **Save**.
5. Repeat for each access level that can cancel a future order.
6. Exit the POS Access Levels function.
Configuring Deposits

You can use deposits to prepay part or all of a future order to cover labor and food costs in the event a customer abandons the order. Aloha Takeout allows customers to add multiple deposits to a future order until the system releases the order to the kitchen. This section details how to enable deposits, as well as how to specify the way in which Aloha Takeout and the Aloha POS interact to make use of the feature. When a customer pays a deposit for a future order, the deposit is not recognized as sales, as items configured as ‘Revenue items’ in the Aloha POS do not affect sales.

Creating Deposit and Deposit Surrender Items

When you need to accept a deposit for a future order, the Aloha Takeout ‘Add Deposit’ function creates a check and adds the deposit item to the check in the amount of the deposit. You tender and close the check based on the tender you select on the ATO Deposit screen, as determined by the customer.

A surrendered deposit occurs when a guest cancels or fails to pick up their order within company guidelines. You can perform the deposit surrender function to offset the cost of prepared food and labor costs. When this occurs, it is necessary to surrender the deposit through the Edit Deposits function on the ATO Deposit screen. Aloha Takeout creates a new check and adds the deposit surrender item in the amount of the deposit selected on the Deposit screen. The system automatically closes the check to the Deposit tender you create. See "Creating a Deposit Tender" on page 14." The system recognizes deposit surrender transactions as sales to offset the deposit payment received earlier.

To create a Deposit item:

1. Select Maintenance > Menu > Items > Item tab.
2. Click the New drop-down arrow, select Standard as the item type, and click OK.
3. Under the ‘Settings’ group bar, type a name for the deposit item in ‘Short name.’ The system automatically populates the ‘Chit name’ and ‘Long name’ when you save.
4. Select **Ask for description** to enable the system to replace the 'Short name,' ‘Chit name,’ and 'Long name' with deposit information on the check.

5. Under the ‘Assignments’ group bar, select a **tax group** associated with a tax type for which there is a zero percent tax rate. Do not define a tax group for which there is a tax rate other than zero percent for the deposit item. Aloha Takeout cannot fully tender the check, if tax is calculated on this item.

6. Select a **category** under which you would like deposits to report from the 'Sales/retail category' drop-down list.

7. Select the **Pricing** tab.

8. Select **Ask for Price** from the 'Pricing method' drop-down list. The system automatically enters the price based on the deposit amount selected on the Deposit screen.

---

**To create a Deposit Surrender item:**

1. In Item Maintenance on the Items tab, click the **New** drop-down arrow, select **Standard** as the item type, and click **OK**.

2. Under the ‘Settings’ group bar, type a **name** for the deposit surrender item in ‘Short name.’ The system automatically populates ‘Chit name’ and ‘Long name’ when you save.

3. Select **Ask for description** to enable the system to replace 'Short name,' ‘Chit name,’ and 'Long name' with deposit surrender information on the check.

4. Under the 'Assignments' group bar, select a **tax group** to associate with a tax type for which there is a zero percent tax rate.

5. Select a **category** under which you would like the deposit surrender to report from the 'Sales/retail category' drop-down list.

6. Select the **Pricing** tab.
7. Select **Ask for Price** from the ‘Pricing method’ drop-down list. The system automatically enters the price based on the surrendered deposit amount selected on the Deposit screen.
8. Click **Save**.

Creating a Deposit Tender

Aloha Takeout uses the deposit tender to reduce the balance due on the check by the deposit amount previously paid by the guest.

1. Select **Maintenance > Payments > Tenders > Tender** tab.
2. Click the **New** drop-down arrow, select **Generic** as the ‘Tender type,’ and click **OK**.

3. Under the ‘Settings’ group bar, type a **name**, such as Deposits, to easily identify the deposit tender.
4. Select **Active**.
5. Select **Track**.
6. Under the ‘Overpayment’ group bar, clear **Allow overpayment** and under the ‘Tips’ group bar, clear **Allows tips**, because the system applies the exact amount of each deposit using this tender.
7. Do not select **any options** on the Type tab, as the deposit tender is a ‘non-cash’ generic tender.
8. Click **Save** and exit the **Tenders** function.
Specifying POS Tenders Available for Deposits in Aloha Takeout

The Tenders tab in Takeout Settings allows you to specify the Aloha POS tenders available to apply to future deposits in Aloha Takeout. Adding POS tenders on this tab provides the linkage between Aloha Takeout and the POS reporting structure.

1. Select Maintenance > Takeout Configuration > Takeout Settings > Tenders tab.

![Figure 12 Takeout Settings, Tenders Tab](image)

2. Under the ‘Tender Types’ group bar, click the Add drop-down arrow, select an Aloha Takeout tender type, and click OK.
3. Select a POS tender created for use with Aloha Takeout from the ‘Tender Id’ drop-down list.
4. Select Available for deposits, if this tender button needs to appear on the Deposits screen.
5. Type the text to appear on the button in ‘Description.’
6. Repeat this procedure as many times as necessary to add all the tenders you need to support accepting deposits or closing checks while using Aloha Takeout.
7. Click Save.

Configuring Deposits for Use with Future Orders

After creating tenders for use with deposits, it is necessary to configure Aloha Takeout to enable the use of deposits.

![Figure 13 Deposit Tab](image)

1. Select Maintenance > Takeout Configuration > Takeout Settings > Deposits tab.
2. Under the ‘Deposits’ group bar, select Enable deposits. When selected, other deposit configuration options appear.
3. Select the tender you created for use with future order deposits from the ‘Deposit tender’ drop-down list.
4. Select the order mode to apply when the system creates a deposit check from the ‘Deposit order mode’ drop-down list.

Do not configure a service charge for the deposit order mode. Aloha Takeout cannot fully tender the deposit if you configure a service charge.
5. Select the item specifically created for adding a deposit to a guest check from the 'Deposit revenue item' drop-down list.
6. Select the item specifically created for surrendering a deposit due to canceled orders from the 'Deposit surrendered item' drop-down list.
7. Select Print deposit receipts when collected, refunded, or surrendered to print a guest check any time you complete an activity related to deposits.

![New Deposit Receipt]

**Figure 14** Example, Printed Deposit Receipt

Receipts for other transactions related to deposits appear very much the same as this one. The information included on these receipts varies, depending upon the type of payment, the type of customer, and more.
Providing the Ability to Refund and Surrender Deposits

With Aloha Takeout, you configure which POS access levels can authorize a deposit refund and surrender deposits.

1. Select **Maintenance > Labor > POS Access Levels**.
2. Select an **access level** from the ‘POS Access Level’ drop-down list.

![Image of POS Access Levels](image)

3. Under the ‘Aloha Takeout’ group bar, select **Authorize deposit refunds**.
4. Click **Save**.
5. Repeat for each **access level** that can refund and surrender a deposit.
6. Exit the **POS Access Levels** function.

Figure 15 Authorize Deposit Refunds and Surrender

Configuring Recurring Orders

Aloha Takeout now allows you to accept and schedule recurring orders for customers who desire this capability. The system uses the terminology of “patterns” to establish as well as manage recurring orders for a customer. A recurring order is considered a series of future orders.

![Image of Takeout Settings](image)

1. Select **Maintenance > Takeout Configuration > Takeout Settings > Options** tab.
2. Under the ‘Future orders’ group bar, select **Enable recurring orders**.
3. Click **Save**.

Figure 16 Future Orders Recurring Orders
Refreshing the Data

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

CAUTION

Refresh data with caution and never during peak hours of operation. All FOH terminals reboot during a refresh and are down for a short period of time.
Using Future Orders

This section details how to use future orders, apply and surrender deposits, and manage recurring orders on the Aloha FOH. A future order is an order that occurs any time apart from the present time until five years later. With Aloha Takeout you can create a single future order, as well as a recurring order. A recurring order is a repeat of the same order that occurs using a specific pattern of future dates. Customers can add deposits to both future orders and recurring orders. You manage Future Orders at the Aloha Takeout Future screen, which you access from the Aloha Takeout navigation bar.

Managing Future Orders

Aloha Takeout allows you to accept future orders. Once you receive an order, you can change the promise time and date, the items or quantities, or cancel the order, if necessary.

Creating a Future Order in ATO

When you log in to Aloha Takeout, the Look Up screen appears as the default screen, when configured. Most operations set the Look Up screen as the default screen for order takers. You can start Future Orders from the Look Up screen.
**SCENARIO:** A customer wishes to place an order for a time or date sometime in the future. The order can be for later today, next week, or up to five years later.

1. Start a **future order** in one of three ways:
   - Select a **customer** or **add a new guest** from the Look Up screen and then touch **Start Delayed** on the right side of the screen.
   - OR-
     Touch **Promise Time** at the Order Confirmation screen.
   - OR-
     Select a **time slot** and touch **Schedule New Order** at the Future screen.
   The Delayed Order Information screen appears.

   ![Figure 18 Delayed Order Information Screen](image)

2. Select a **calendar date** and **time** for the order. You can use the right and left arrows to move to a different month.
3. Use the ’+’ and ’-‘ buttons to adjust the **promise time** and the **prep time**, if necessary.
4. Touch the desired **order mode**.
Finding a Future Order

**SCENARIO:** A customer wants to change or cancel a future order.

1. Touch **Future** on the navigation bar to access the Future screen.

2. Using the Show filter button, touch **Customer** to filter the list by customer name.

3. Type the **customer name** or **phone number** in the search text box.

4. Touch the **magnifying glass** to search for the customer or touch **Clear** to clear the name in the search field.

5. Select the **customer** from the search results and the future orders for the customer appear on the right side of the Future screen.

**Printing a Future Order**

For a customer that desires a confirmation of their order, you can print a statement or a chit to give to them; however, you cannot print a receipt for the customer since the order has not yet been released.

1. Select the **order** for the customer. See "Finding a Future Order" on page 21.
2. Touch **Order Details**.
3. Touch **Print Statement** to print a statement with prices, or touch **Print Chit** to print a statement without prices.

**Editing the Items or Quantity of a Future Order**

**SCENARIO:** A customer wants to make changes to a future order they have already placed with you.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order**. See "Finding a Future Order" on page 21.
3. Touch **Modify**.
4. At the 'Future orders cannot be tendered. Do you want to modify this order?' screen, touch **Yes**.
5. Modify the **items** and/or **quantity** of the order according to the request.
6. Touch the **button** that returns you to the Future screen.
7. Confirm the **order** at the Order Confirmation screen.
Using Future Orders

Editing the Promised Date or Time of a Future Order

SCENARIO: A customer scheduled a future order for Thursday at 12:00 noon and now wants to change the order to Friday at 5:00 p.m.

To edit the promised date or time of a recurring order, touch ‘Edit Recurrence.’

1. Touch Future on the navigation bar to access the Future screen.
2. Find and select the order. See "Finding a Future Order" on page 21.
3. Touch Edit Delay on the right side of the screen. The Delayed Order Information screen appears.

4. Use the right and left arrows to move to and select the desired date.
5. Use the ‘+’ and ‘-’ buttons to adjust the promise time and prep time, if necessary.
6. Touch the desired order mode.

Figure 20 Delayed Order Information Screen
Viewing Future Orders on FOH

SCENARIO: You want to quickly view all future orders without having to run a BOH Future Orders report. From a FOH terminal, you can view future orders for a specific day, week, month, or even for a specific customer.

1. Touch Future on the navigation bar to access the Future screen.
2. Using the Show filter button, select Day, Week, or Month to view future orders for a selected time period.
3. Select the specific time frame for the future orders you want to view.

To review a specific future order, select the time frame in which the future order falls. Select the order and the order details appear on the right side of the screen.

On the ATO BOH, you can also run a number of reports regarding future orders. For more information on these reports, refer to the Aloha Takeout Report Guide.
Canceling a Future Order

SCENARIO: A customer previously placed an order for tomorrow with you and now calls to cancel the order.

To cancel a recurring order, use the ‘Edit Recurrence’ button.

1. Touch Future on the navigation bar to access the Future screen.
3. Touch Remove Order on the right side of the screen.
4. If the order does not have any applied deposits, at the ‘Are you sure you want to remove this future order?’ prompt, touch Yes.
   -OR-
   If the order does have applied deposits, at the ‘Are you sure you want to remove the future order? If so, this order has deposits that need to be either refunded or surrendered,’ prompt, touch Yes. See “Refunding or Surrendering a Deposit” on page 26.

Managing Deposits

You can use the Deposits feature to collect partial or full payment from customers for a future order. When the customer arrives to pick up their order, or when you assign the order to a driver, it is necessary to apply any deposits you previously accepted for the order to the order before performing any other functions. You can also refund or surrender deposits, as necessary.

Accepting a Deposit

Deposits allow you to collect partial or full payment from customers for a future order.

1. Touch Future on the navigation bar to access the Future screen.
2. Find and select the order for which you want to accept a deposit from the Future screen. See "Finding a Future Order" on page 21.
3. Touch **Add Deposits** on the right side of the screen. The Deposit Information screen appears.

![Deposit Information Screen](image1)

*Figure 22  Deposit Information Screen*

4. Touch the **appropriate tender button** based on how the customer is paying for the 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.

5. Enter the **deposit value** using the numeric keypad.

6. Touch **Add Deposit**. If the customer is paying with a payment card, the Enter Payment Information screen appears.

![Enter Payment Information Screen](image2)

*Figure 23  Enter Payment Information screen*

7. Enter the **card information** or select **Use credit card on file**, if the card is already present in the system. (Note: If the card is not present, touch 'Save card info to customer’s profile’ to store and encrypt the customer’s credit card information in the customer profile.)

8. Touch **OK**. After the system approves the credit card payment, the deposit appears on the check on the left side of the Deposit information screen.

9. Touch **Exit**.
Applying a Deposit

When the customer who made a deposit arrives to pick up their order, or when you assign an order for which a deposit was made to a driver, you must first apply that deposit to the released order before performing any other functions.

1. Locate and select the released order.
2. Touch Apply Payment on the right side of the screen. The system locates all deposits the customer paid, applies them to the check, and displays a message indicating the deposit has been applied to the order.
3. Tender any remaining balance.
4. Close the order as normal.

The system applies payments in the following order: 1) deposits, 2) credits, and 3) stored payment card.

Refunding or Surrendering a Deposit

In accordance with your company policy, you can refund a deposit to a customer or you can surrender the deposit to compensate your organization for labor and/or food costs. When a customer cancels an order with a deposit attached, the system forces you to either refund or surrender the deposit before allowing you to cancel the order.

1. Touch Future on the navigation bar to access the Future screen.
2. Find and select the order for which you want to refund or surrender a deposit from the Future screen. See “Finding a Future Order” on page 21.
3. Touch Add/Edit Deposits on the right side of the screen.

4. At the Deposit Information screen, select the Deposit line in the order summary panel. A red box appears around the selected Deposit line.
5. If refunding a deposit, select the **Refund Deposit** tab and perform the following steps; otherwise skip to step 6.

   ![Deposit Refund Prompt](image1)

   **Figure 25** Deposit Refund Prompt

   a. Select the **appropriate tender** to use for the refund. In most cases, this will match the tender used to pay for the deposit. If you refund to a payment card, enter the payment card information.

   b. At the ‘Do you wish to refund the selected deposit to the customer as?’ screen, confirm the **tender** is correct and touch **Refund Deposit**.

   c. Obtain **authorization**, if necessary. An employee with the ability to refund a deposit must authorize this transaction.

   d. Touch **Exit**.

6. If surrendering a deposit to the store, select the **Surrender Deposit** tab and perform the following steps:

   ![Deposit Surrender Prompt](image2)

   **Figure 26** Deposit Surrender Prompt

   a. At the ‘Do you wish to surrender the selected deposit to store?’ screen, touch **Surrender Deposit**. The system applies the Deposit tender to the check and closes the check.
b. Obtain **authorization**, if necessary. An employee with the ability to surrender a deposit must authorize this transaction.

\[ \text{c. Touch Exit.} \]

**Managing Recurring Orders**

Aloha Takeout allows you to accept, schedule, and manage recurring orders for customers. The system uses the terminology of ‘patterns’ to manage recurring orders. You can create a recurring order, cancel an instance of a recurring order, change the pattern of the occurrence, and modify the items and quantities for a particular instance of the recurring order.

**Creating a Recurring Order in ATO**

*SCENARIO:* A customer wishes to create the same order for every single Wednesday for the next year without having to call you each week to request the order.

1. At the Look Up screen, select a **customer** for the recurring order by either adding a new customer or choosing an existing customer.
2. Select an **order mode**.
3. Enter the **items and quantities** for the order.

![Figure 27 Order Confirmation Screen](image)
4. At the Order Confirmation screen, touch **Recurring**. The Recurring Order screen appears.

![Recurring Order Screen](image1)

*Figure 28 Recurring Order Screen*

5. Touch **Add Pattern**. When you are creating a new recurring order, the only available option is Add Pattern. All other options, such as Delete Pattern, Edit Pattern, and Notes are not available. The Schedule Pattern Wizard screen appears.

![Schedule Pattern Wizard](image2)

*Figure 29 Schedule Pattern Wizard*

6. Select the **pattern** for the recurring order and a screen specific to the pattern you choose appears.

- **One Time** — Allows you to add or remove a single order from your schedule.
- **Weekly** — Allows you to add an order for a specific day of the week as well as set how often the order should repeat.
**Day of Month** — Allows you to add an order for a specific day of the month as well as set how often the order should repeat.

**Daily** — Allows you to an order which will repeat every day or every few days as well as when the recurring order should start and end.

**Nth Occurrence** — Allows you to add an order on a specific week of the month as well as the weekday of the week, such as the third Wednesday of the month. You can also determine how often the order should repeat and when the recurring order should start and end.

**Substitution** — ‘allows you to substitute an order occurring on a day with an order which will occur on another future day. This button remains unavailable until you schedule a recurring order for the customer.

7. Select a **starting** and **ending date**, as well as other options for the particular pattern.

Any information you enter into the ‘Notes’ section of the Schedule Pattern Wizard screen appears on all associated recurring orders.
8. Touch Ok.

![Figure 31 Recurring Order with Weekly Pattern](image)

At the Recurring Order screen, when you select a recurring order from the patterns box, the recurring order appears in green on the patterns box and the associated orders appear in yellow, along with an order icon.

**Removing An Instance of a Recurring Order**

With Aloha Takeout, you can remove an instance of a recurring order without canceling the entire recurring order. To accommodate the request, use the ‘Add Pattern’ feature.

**SCENARIO:** A customer with a weekly recurring order for every Wednesday does not want the order for a particular Wednesday.

Do NOT use the ‘Delete Pattern’ function to remove a single occurrence of a recurring order. The ‘Delete Pattern’ function removes all recurring orders within the pattern.

1. Touch Future on the navigation bar to access the Future screen.
2. Find and select the order for which you want to remove an instance of a recurring order. See “Finding a Future Order” on page 21.
3. Touch **Edit Recurrence** on the right side of the screen. The Recurring Order screen appears.

![Figure 32 Recurring Order Screen](image)

4. Touch **Add Pattern** on the right side of the screen. The Schedule Pattern Wizard screen appears.

![Figure 33 Schedule Pattern Selection](image)
5. Touch **One Time**.

![Schedule Pattern Wizard](image)

**Figure 34** Schedule Pattern Wizard

6. Touch the **date button** that follows the ‘Occurring one time on’ prompt.
7. Use the left and right arrows to select the **instance** of the recurring order to remove and touch **Ok** to return to the Schedule Pattern Wizard screen.
8. Touch **Remove Order** on the right side of the screen. A confirmation appears.
9. Touch **Ok**. After touching ‘Ok,’ a red ‘X’ appears on the date selected and the system adds a new pattern.
10. Touch **Commit** on the right side of the screen.

![Recurring Order Removed](image)

**Figure 35** Recurring Order Removed
Canceling a Recurring Order

SCENARIO: A customer wishes to cancel all recurring orders in a pattern. You can easily do this at the Recurring Order screen.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** you wish to cancel from the Future screen. See "Finding a Future Order" on page 21.
3. Touch **Edit Recurrence** on the right side of the screen.
4. At the Recurring Order screen, under the Patterns box, select the **recurring order** you want to cancel. Remember, this cancels all instances of a recurring order.
5. Touch **Delete Pattern** on the right side of the screen.
6. Touch **Commit** on the right side of the screen.

The recurring order appears in green in the Patterns box.

Once you select Delete Pattern, the system deletes all instances of the recurring order. A confirmation screen does not appear.

Editing the Pattern of a Recurring Order

SCENARIO: A customer with a recurring order that takes place every Wednesday contacts you and wishes to change the order to occur every other Thursday. Instead of deleting the existing pattern and creating a new one, you can edit the existing pattern to accommodate the request.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** for which you want to edit the recurrence from the Future screen. See "Finding a Future Order" on page 21.
3. Touch **Edit Recurrence** on the right side of the screen.
4. At the Recurring Order screen, select the **pattern** you wish to edit.
5. Touch **Edit Pattern** on the right side of the screen. The Schedule Pattern Wizard screen appears.

![Schedule Pattern Wizard](image1)

*Figure 37 Schedule Pattern Wizard*

6. Use the `-` or `+` to make the **necessary changes** to the pattern. (In the scenario example, you would change the **number** in ‘occurring every’ to 2 and change the **day** in ‘on’ to Thursday.)

7. Touch **Ok**.

![Recurring Order, Edited Pattern](image2)

*Figure 38 Recurring Order, Edited Pattern*
8. Touch **Commit**.

In the Recurring Order screen, the dates of the recurring order and the order icon now appear according to the edited pattern.

### Modifying the Items in an Instance of a Recurring Order

**SCENARIO:** A customer with a recurring order wishes to change the items and quantity for an order on a particular date. It is necessary to select the recurring order, modify the items in the order, and then choose the specific instance.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** for which you want to modify the items in an instance of the order from the Future screen. See "Finding a Future Order" on page 21.
3. Touch **Modify** on the right side of the screen. The prompt, ‘Future orders cannot be tendered. Do you want to modify this order?’ appears.
4. Touch **Yes**.
5. Adjust the **quantity and items** of the order in accordance with the request.
6. Touch the **button** that returns you to the Future screen.
7. At the Order Confirmation screen, touch **Recurring**.
8. At the Recurring Order screen, use the left and right arrows to navigate to the **date** of the modified order.

The date appears in green with a red exclamation mark in the date box. The order details appear to the right of the calendar.

![Figure 39 Recurring Order Modified](image)

**9.** Touch **Add Pattern** on the right side of the screen. The Schedule Pattern Wizard screen appears.

**10.** Confirm the **date** for ‘Occurring one time on’ is correct and touch **Add Order**.
11. Touch **Ok**.

12. Touch **Commit**.

### Changing the Date for One Instance of a Recurring Order

**SCENARIO**: A customer with a recurring order for every Thursday wishes to change the order for one week from Thursday to Tuesday. You can accommodate the customer’s request without re-entering the entire order. It is necessary to add a pattern for the one new instance of the order and a second pattern to cancel the old instance of the order.

1. Touch **Future** on the navigation bar to access the Future screen.
2. Find and select the **order** on the date for which you want to change the instance of the recurring order. See "Finding a Future Order" on page 21.
3. Touch **Edit Recurrence** on the right side of the screen.
4. Touch **Add Pattern** on the right side of the screen to add a date for the new instance of the order. The Schedule Pattern Wizard screen appears.
5. Touch **One Time**.
6. Touch the **date button** that follows the ‘Occurring one time on’ prompt.
7. Use the left and right arrows to select the date on which to add the new **instance** of the recurring order and touch **Ok** to return to the Schedule Pattern Wizard screen.
8. Touch **Add Order** on the right side of the screen.
9. Touch **Ok**.

The system places an order icon and a red exclamation mark on the new desired date. This only adds the new order. You still need to remove the order you are replacing.
10. Touch **Add Pattern** on the right side of the screen, to select the instance of the order you want to remove. The Schedule Pattern Wizard screen appears.

11. Touch **One Time**.

12. Touch the **date button** that follows the ‘Occurring one time on’ prompt.

13. Use the left and right arrows to select the **date** on which the instance of the recurring order to remove occurs and touch **Ok** to return to the Schedule Pattern Wizard screen.

14. Touch **Remove Order** on the right side of the screen.

15. Touch **Ok**. (A red exclamation ‘X’ appears over the order icon on the date selected.)

16. Touch **Commit**.
### Feature History

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