

New Waterloo Aloha Guide

Local Resellers:

Austin: POS Solutions - 512.833.9840 (M-F 8:30am to 5:30pm) After hours support available, but you MUST leave a voicemail in the **afterhours** mailbox (listen for prompts).

If the Internet Goes Out – Follow instructions on the last page of this document, to keep processing Credit Cards

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Accessing Aloha

There are two different ways to access aloha, depending on your location and implementation.

1. If you have a monitor and keyboard hooked up to your Aloha server, then you already have physical access to the Back of House server.

2. Your server lives in a back office or server closet. If this is the case, you'll use Microsoft Remote Desktop to remotely connect to the Aloha server. If this isn't setup for you, please contact the IT dept (support@newwaterloo.com).



Once you have access to the aloha server, you need to click on the **Orange** icon on the desktop, that either says Aloha Manager or Aloha Configuration Center. Your username is your Aloha # (unless you changed it). If you don't know your password, contact the IT dept (support@newwaterloo.com).

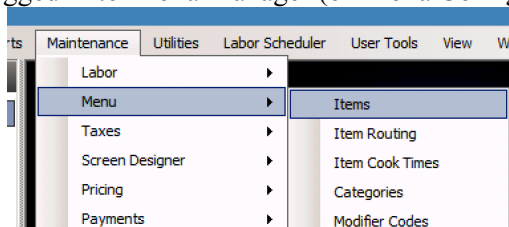


Adding Items and Updating Menus - The Refresher

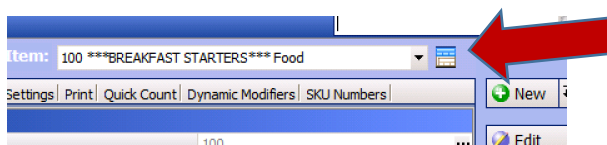
The Short and Simple Explanation (there is a more thorough/detailed explanation further down)

If this is the first time you are doing this, please read the thorough explanation, so you really understand how to do it. This section is really for people who have done it many times and just need a quick refresher.

1. Once logged in to Aloha Manager (or Aloha Configuration Center), go to Maintenance -> Menu -> Items.

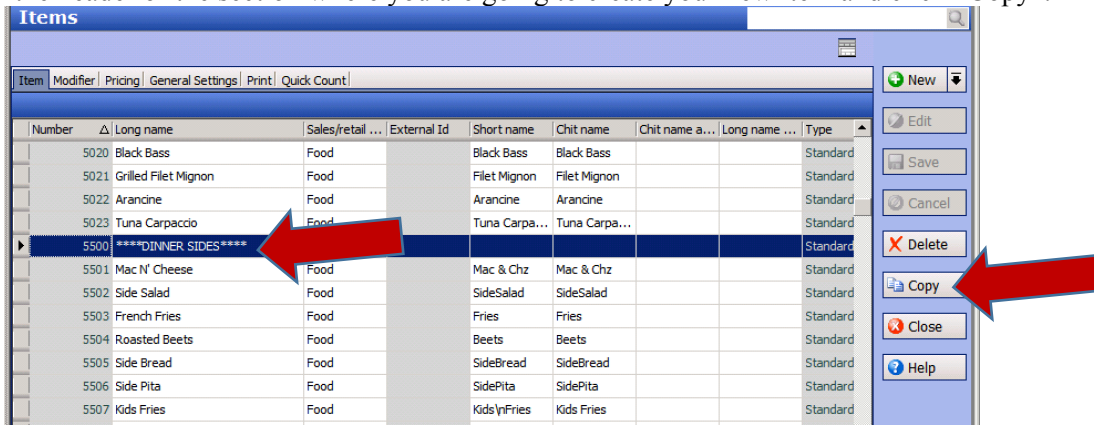


2. Click on the "Grid View" button, so you see the entire list of all items.



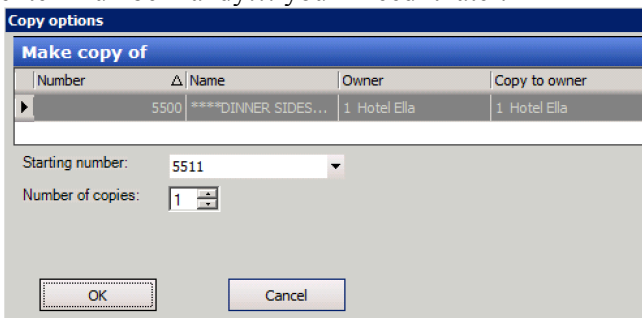
3. Scroll down to the section where you need to add the item (Please make sure you create the item in the proper section. If you are unsure what this means, please read the thorough explanation.)

- Click on the header of the section where you are going to create your new item and click "Copy".



1.

- When the Copy Options box pops up, select the number of Copies you want, and change the starting number to whatever number you want them to start at. (if you are only creating 1 item, then this will be the item number). Keep the item number handy... you'll need it later.



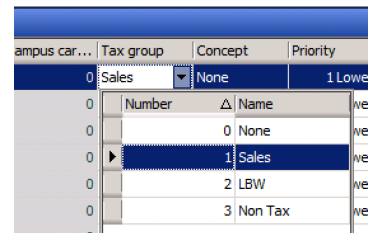
1.

- Once the item has been created, change the name of the item, along with the Short name (button name) and the Chit name (for printing in the kitchen).

- Change the default price to whatever the price needs to be.

- Make sure the Tax Group is set to the appropriate option (Sales for food, LBW for Liquor, Beer, and Wine, and Non for Gift Cards).

- If you are creating a modifier that has no price associated with it, then you can leave it as none.



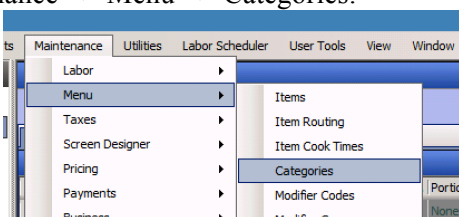
- If any modifiers need to be added to the item, make sure you add them here.

	Modifier 1	Modifier 2	Modifier 3	Modifier 4	Modifier 5	Modifier 6	Modifier 7	Modifier 8	Modifier 9	Modifier 10
1	Temp Mods	None	None	None	None	None	None	None	Food Mods	Allergy Mods
1	None	None	None	None	None	None	None	None	Food Mods	Allergy Mods
1	Kid Sides	None	None	None	None	None	None	None	Food Mods	Allergy Mods
1	Kid Sides	None	None	None	None	None	None	None	Food Mods	Allergy Mods
1.	Kid Sides	None	None	None	None	None	None	None	Food Mods	Allergy Mods

1.

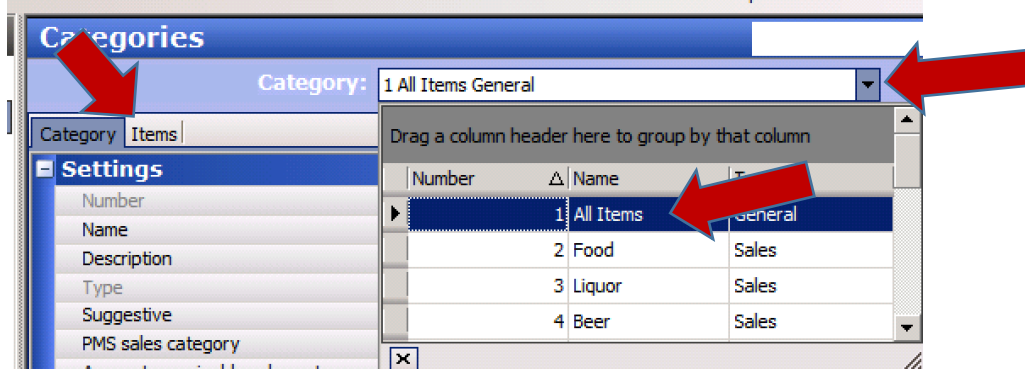
- Click Save and Yes to Auto-Update.

- Now that the item has been created and saved, we need to add it to all of our various item categories. Click Maintenance -> Menu -> Categories.



1.

12. Click the drop-down menu and select “All Items” or similar. Then click the items tab.



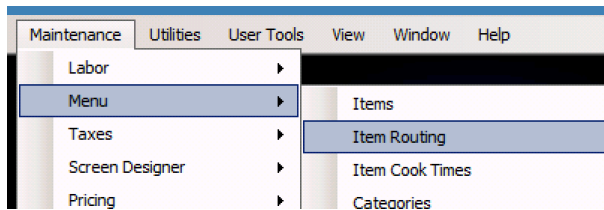
1.

13. Move your new item over to the right-hand side (included) and click save.

14. You then need to add it to any of the other Categories you might have, for reporting purposes.

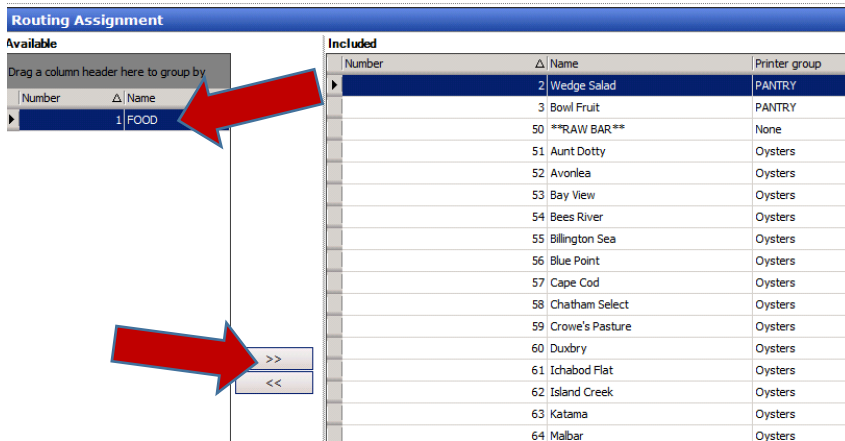
1. If you have a category for Rose Wine, and you just added a Rose wine, then you’ll need to go to the Rose Category, and add the newly created wine to the “Included” section.

15. Now that it has been added to the appropriate categories, you now need to tell it where to print in the kitchen. Click Maintenance -> Menu -> Item Routing.



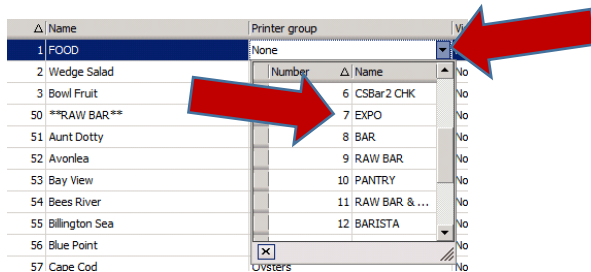
1.

16. Once it item routing, you should see your newly created item in the left window. Select it, then click the right arrow to send it over to the right-side window.



1.

17. Once the Item has been moved over to the Included window, you’ll need to select the printer group that it will go to. Click the dropdown and select the correct printer group. You can reference similar items, if you are unsure of where to send it.



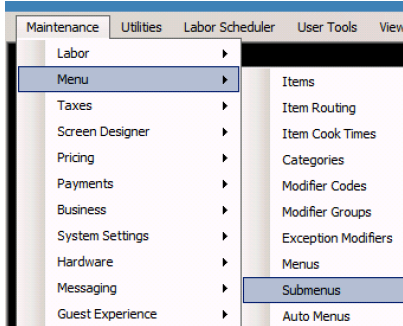
1.

18. Click Save and then “Yes” when it asks about a real-time update.

Add the Item to a Menu

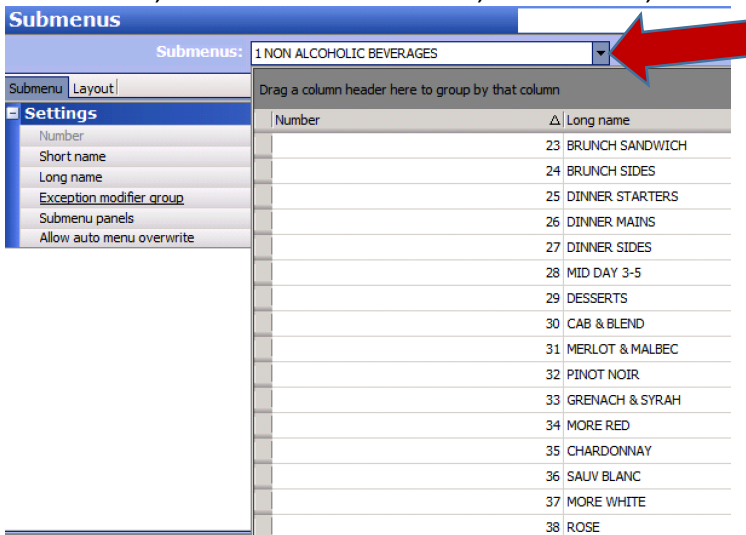
Once you have finished creating the item and adding it to all of the correct categories and set it up to print to the correct locations in the kitchen, you now need to add it to a menu!

1. Click Maintenance -> Menu -> Submenus



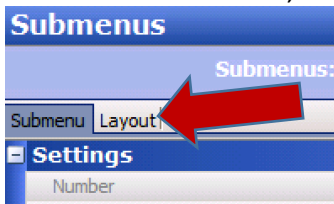
a.

2. Once in the Submenus, click the dropdown and select the correct submenu you want to add the item to (if it's a lunch main, then select lunch mains; if it's a Beer, then select Beer; etc).



a.

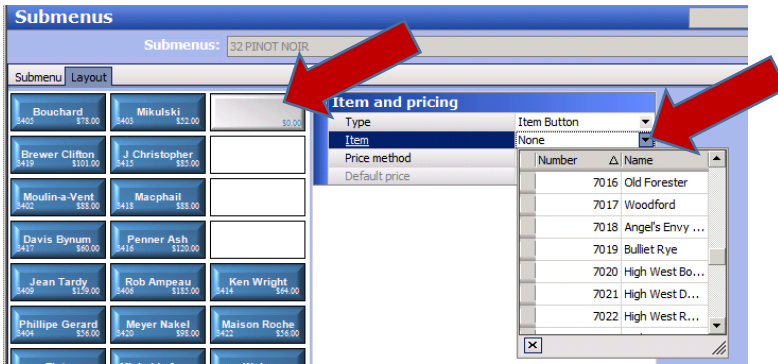
3. Once in the correct submenu, click the layout tab.



a.

4. In the layout window, click on one of the white boxes (an empty box) to create a new button.

5. On the right-hand side, click on the dropdown and select the item you just created (this is where it is nice to have the item number handy).



a.

6. Once you've selected the item and it is located on the menu where you want it, click save and "Yes" for the real-time update.

Adding Items and Updating Menus – A thorough explanation

The Basics

Before we dig into how to add items, you need to understand how we breakup our item numbers by day part and menu section. You also need to understand that we create multiple items, if the same item is sold during multiple day parts. By that, I mean if we sell a burger at brunch, lunch, and dinner, then we'll have 3 different burgers in our system. This allows us to accurately track how many burgers were sold during each day part, without having to run a variety of reports.

Day Part

All items are broken down into sections. The major sections are day parts. Here is an example of what a day part might look like in a system:

- Breakfast
- Brunch
- Lunch
- Dinner
- All Day

We then break down items by menu sections of that meal period (Apps, Mains, Sides, Desserts). Here is an example of what you might see in a system:

- Brunch Starters
- Brunch Mains
- Brunch Sides
- Brunch Desserts
- Lunch Starters
- Lunch Mains
- Lunch Sides
- Lunch Desserts
- Etc

We also have items that are non-food, that don't fit into that pattern. So, we have groups that segregate items based of a common category:

- Non-Alcoholic Beverages (NA Bev)
- Beer
- Wine
- Liquor

We also break down those sections to smaller minor categories

- Beer
 - Bottled
 - Can
 - Draft
- Wine
 - Red
 - White
 - Rose
 - Sparkling
- Liquor
 - Sake
 - Gin
 - Vodka
 - Tequila
 - Mezcal
 - Scotch
 - Whiskey
 - etc

Once we determine what our Meal Periods and Menu sections are, we then assign each item section a block of numbers, so all items that would be created and sold in that section, are in the same Item Number group (so they are easy to find when combing through thousands of items). Here is an example of what that would like in a system:

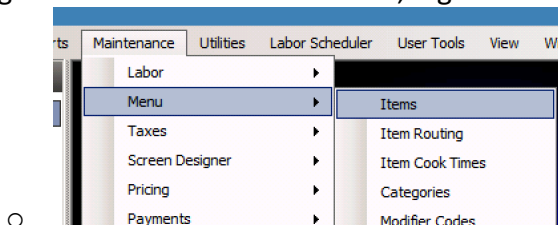
- 1-100k Food and Modifiers
 - 10,000-20,000 Brunch
 - 10k – Brunch Starters
 - 12k – Brunch Mains
 - 14k – Brunch Sides
 - 16K – Brunch Desserts
 - 20,000 – 30,000 Lunch
 - 20k – Lunch Starters
 - 22k – Lunch Mains
 - 24k – Lunch Sides
 - 26k – Lunch Desserts
- 100k-200k Beverages
 - 100k – NA Bev
 - 105k – 110k – Beer
 - 105k – Bottled Beer
 - 106k – Canned Beer
 - 107k – Draft Beer
 - 110k-150k – Wine
 - 110k – White Wine
 - 120k – Red Wine
 - 130k – Rose Wine
 - 140k – Sparkling Wine
 - 145k – Sake
 - 150k – 200k – Liquor
 - 150k – Gin
 - 155k – Vodka
 - 160k – Tequila
 - 165k – Mezcal
 - 170k – Scotch
 - 175k – Whiskey
 - Etc

Now that you have an understanding of how we number items, based on their category, we can dive into aloha to see what that actually looks like. The first thing you will notice is that each Major and Minor section is the first item number in that block. In the example below, you'll notice the Major Category (NA Bevs) is the first item in the number block (10,000) and the first minor category (Hot Beverages) is the second item in the number block (10,001). We identify our categories by putting three asterisks (*) before and after the name, so they stand out.

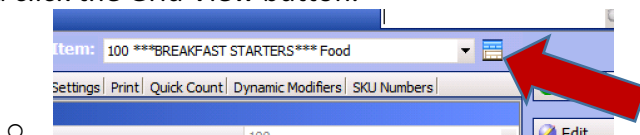
Number	Long name	Sales/retail ...	External Id	Short name	Chit name	Chit name a...
10000	***NA BEVERAGES***	NA Bev				
10001	***HOT BEVS***	NA Bev				
10002	Espresso Drinks	NA Bev		Espresso Dr...	Espresso Dr...	
10003	Organic Tea	NA Bev		Organic Tea	Organic Tea	
10004	Espresso	NA Bev		Espresso	Espresso	
10005	DBL Espresso	NA Bev		DBL Espresso	DBL Espresso	
10006	Coffee	NA Bev		Coffee	Coffee	
10007	Carafe Coffee	NA Bev		Carafe Coffee	Carafe Coffee	
10008	Hot Chocolate	NA Bev		Hot Chocolate	Hot Chocolate	
10050	***JUICES***	NA Bev				
10051	Orange Juice	NA Bev		Orange Juice	Orange Juice	
10052	Grapefruit Juice	NA Bev		Grapfruit Ju...	Grapfruit Ju...	
10053	Cranberry Juice	NA Bev		Cranberry J...	Cranberry J...	
10054	Milk	NA Bev		Milk	Milk	
10055	Fresh Lemonade	NA Bev		Lemonade	Lemonade	
10056	Fruit Juices	NA Bev		Fruit Juices	Fruit Juices	
10100	***SOFTDRINKS***	NA Bev				
10101	Coca-Cola	NA Bev		Coke	Coke	
10102	Diet Coca-Cola	NA Bev		Diet Coke	Diet Coke	
10103	Sprite	NA Bev		Sprite	Sprite	
10104	Dr. Pepper	NA Bev		Dr. Pepper	Dr. Pepper	

Adding an Item

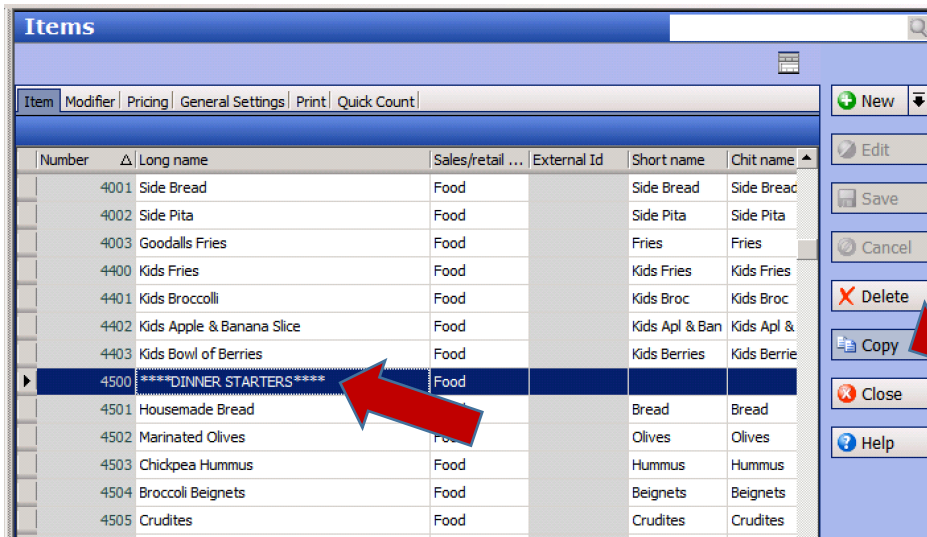
- To get to the screen shown above, login to Aloha and go to Maintenance -> Menu -> Items.



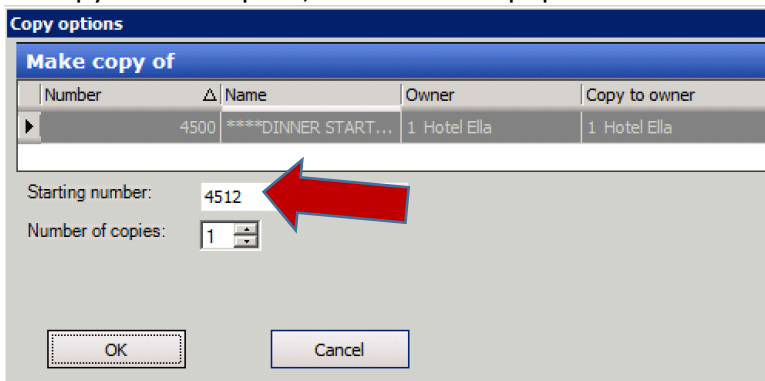
- Once the screen comes up, we find that it is much easier to edit items using the "Grid View," so go ahead and click the Grid View button.



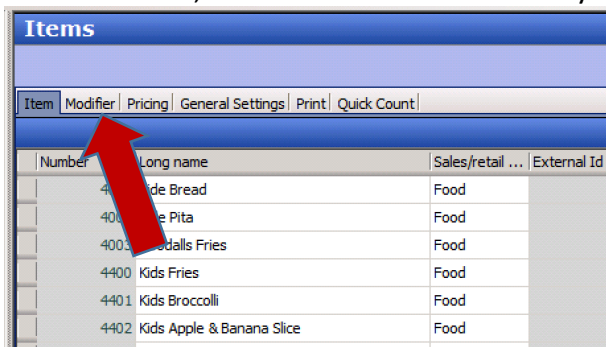
- Now you'll see the entire list of items.
- Scroll through the list until you've found the section where you'd like to create the new item.
 - Please Note: if you are selling this new item during multiple timeframes (at Lunch, Dinner, Brunch, All day), then you'll need to create it multiple times in each section.
- Once you are ready to create your new item, you'll want to click on the section header and click the copy button.



-
- The reason we are copying the Section Header, is so it also copies a lot of the other settings associated with the item (Modifiers, Tax Rate, Sales Category, etc).
- When the copy window opens, it should auto-populate the next item number in that block.

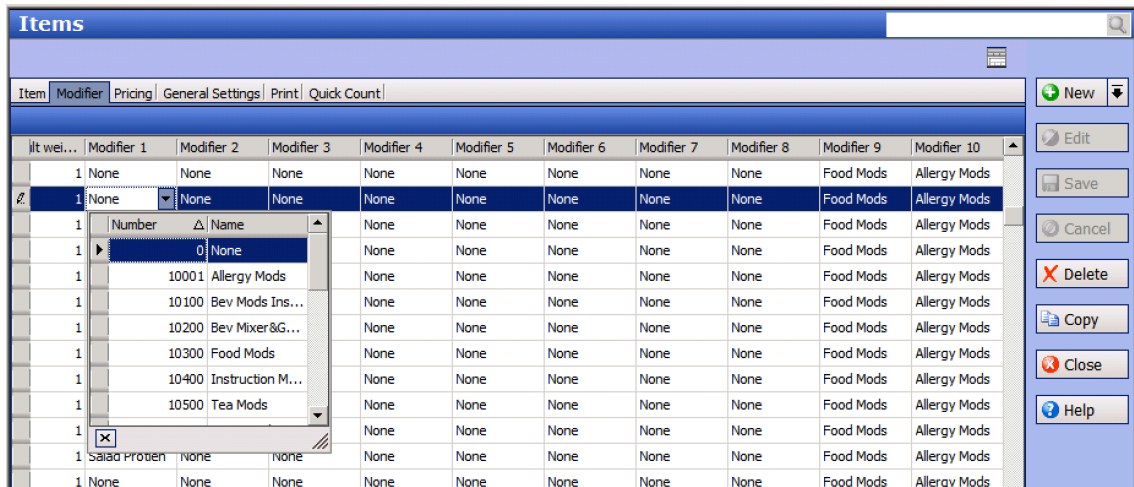


-
- If you are only creating a single item in this section, click OK. If you need to create multiple items in this section, change the “Number of Copies” to the correct quantity and click OK.
 - Change the Long Name to the actual name of the item (this is the name that will print on the Guest Check, so make sure it’s correct).
 - Scroll to the right and change the Short Name to whatever you want it to say on the Button (on the menu).
 - Continue scrolling to the right and change the Chit Name to whatever should print in the kitchen.
 - Click Save (Yes if asked about real-time update)
- Click the Modifier Tab, so we can add or remove any applicable modifiers.

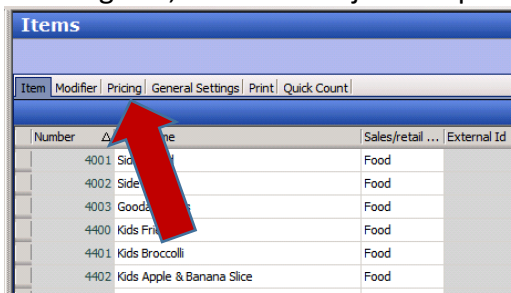


-
- First off, make sure you are still on the same item. You should be, but sometimes Aloha is a little funky).

- Once you've determined you are on the correct item, scroll to the right until you get to the modifier columns.
- You'll see the standard optional modifiers that are applied to all items (Allergy and Food Mods). You would add additional modifiers here. If it's a steak and needs to prompt for temps, this is where you would make that happen. Click the drop-down and select the appropriate Modifier Group. Then click Save.



- Click the Pricing Tab, so we can adjust the price of this item.



- Scroll to the right until you get to the "Default Price" column. Enter the price of the item and hit save.

****Pro Tip****

If you are adding a similar item to one that already exists in that section, you can just copy the existing item. This way, it not only copies the Tax Group, but it will also copy the mods that would apply to that item (like sandwich sides, or salad proteins, or etc). It would save you a couple of unnecessary clicks.

This concludes adding an item to the system. The next step is to add the item to appropriate Item Categories, then setup printer routing.

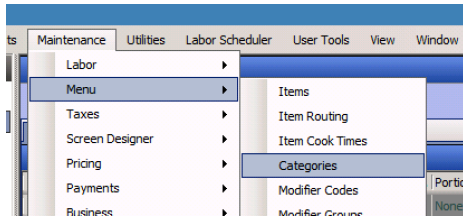
Adding Items to Categories

We use categories to specify a group of items for Comps, or to run specific reports (think: PMIX on certain categories of items). We have a category called All Items. As the name suggests, all items should be in this category. That means every time you create a new item, you have to manually add it to this Category. There are also other categories that may have been setup for various reporting needs. An example might be Rose Wine. If you wanted to run a Product Mix (PMIX) that only has Rose Wine on it, then you would need to create a Category that contains only those items.

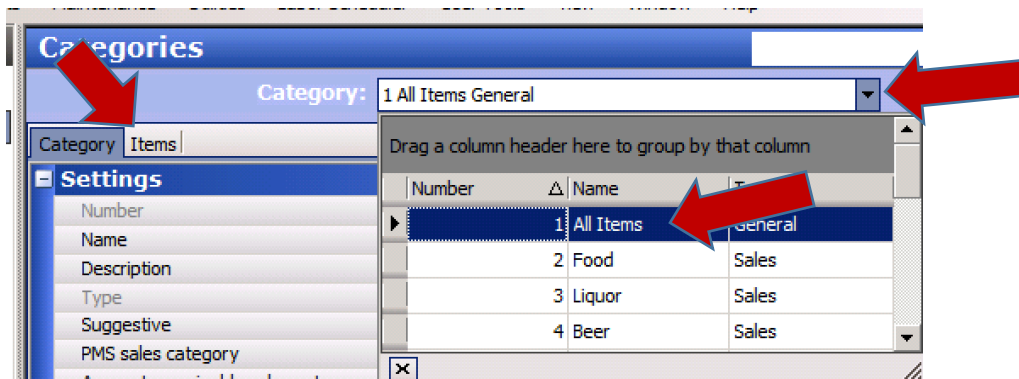
If you are creating a Food or NA Beverage item, you also need to add it to the Food&NABev category, which is what we use for discounts for Employees and Investors/Club Members. If you don't add it to the

After you've created a new item, you need to add it to the All Items category. Let's walk thru what that process looks like.

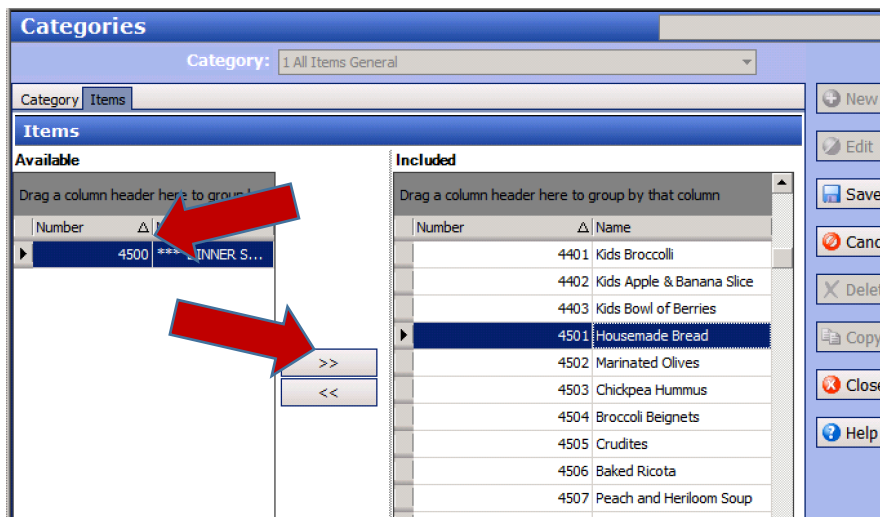
- Click Maintenance -> Menu -> Categories.



- Click the drop-down menu and select "All Items". Then click the items tab.



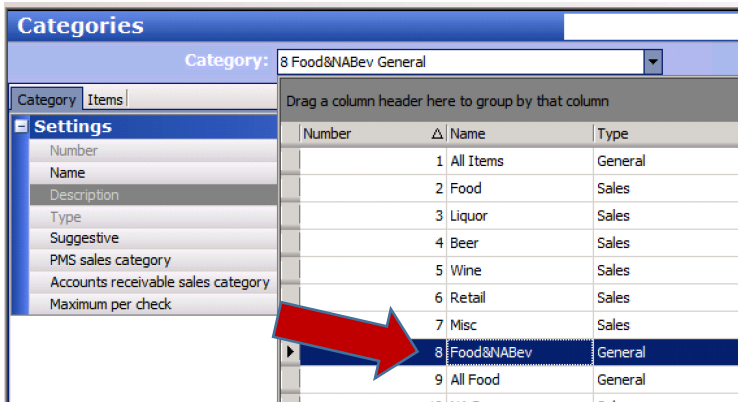
- You should now see the new item you created in the left-hand window. Click on it and then click the arrow button to move your new item over to the right-hand side (included). If there are any other items that are not already included, move them over as well, since all items must be in the all items category. Then, click Save (yes to real-time update).



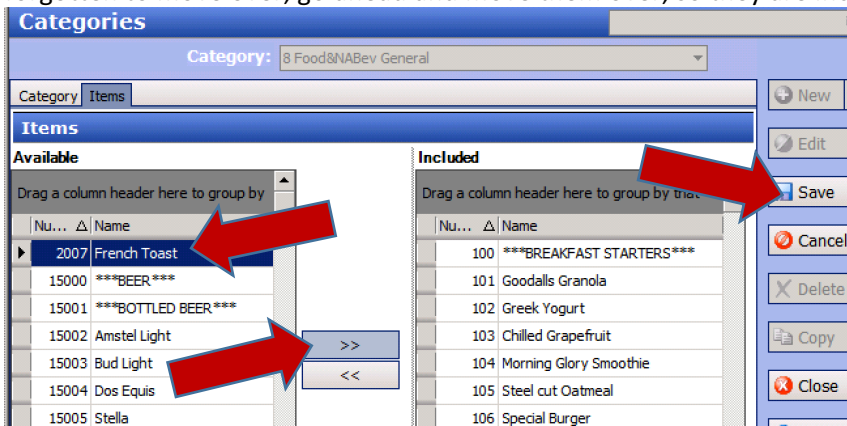
- Remember that while you are here, if you need to add this item to other categories, this is a great time to do it.

If you created a Food or NA Beverage item, you still need to add it to the Food&NABev Category.

- Click the drop-down box at the top and select "Food&NABev"



- You should see the new item you created in the left-hand window. Select it and click the right-arrow to move it over into the right-hand column. Then save the changes.
 - *****Note***** if there are other Food or NA Beverage items in the left-hand side that someone might have forgotten to move over, go ahead and move them over, so they are included going forward.

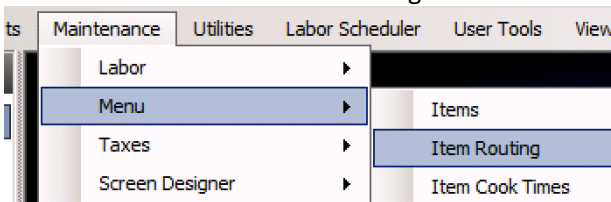


That's all you need to do to add an item to a Category. Next, you need to update the Item Routing, to make sure it makes it to the proper printer(s) in the kitchen.

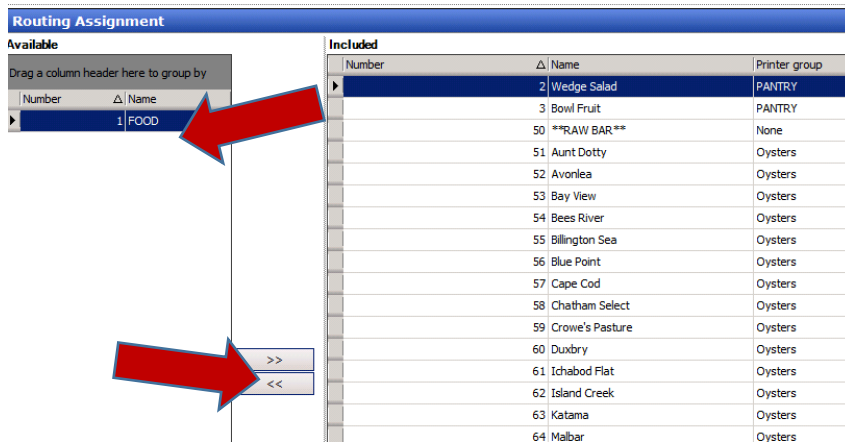
Adjusting Item Routing

Item Routing allows us to select where items print in the kitchen. We use printer groups to define what printers items get sent to (since many times, we want items to go to multiple printers).

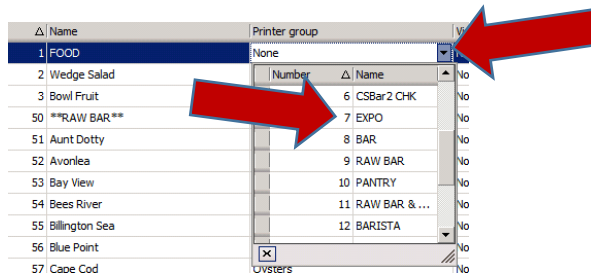
- Go to Maintenance -> Menu -> Item Routing



- Once in item routing, you should see your newly created item in the left window. Select it, then click the right arrow to send it over to the right-side window.



- Once the Item has been moved over to the Included window, you'll need to select the printer group that it will go to. Click the dropdown and select the correct printer group. You can reference similar items, if you are unsure of where to send it.

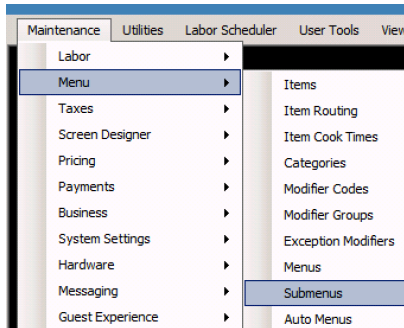


- Click Save and then "Yes" when it asks about a real-time update.

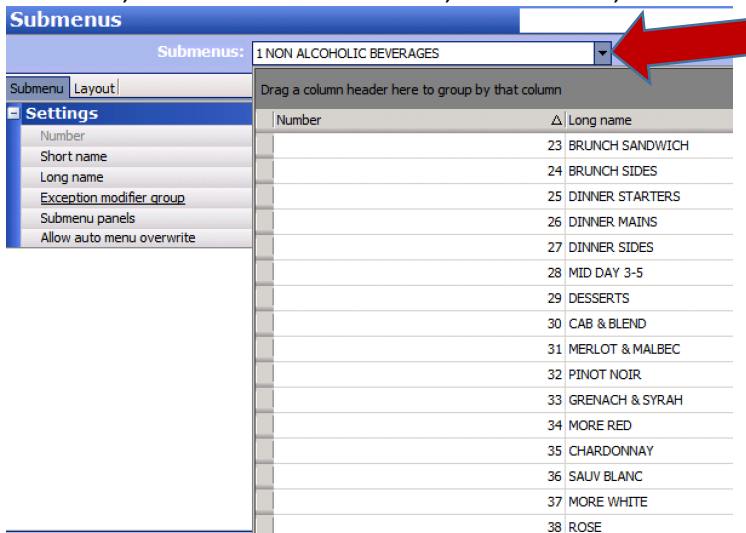
Add an Item to a Submenu

Once you have finished creating the item and adding it to all of the correct categories and set it up to print to the correct locations in the kitchen, you now need to add it to a menu!

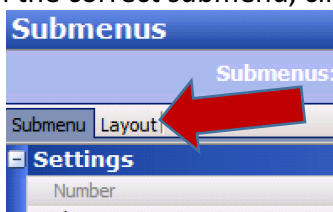
- Click Maintenance -> Menu -> Submenus



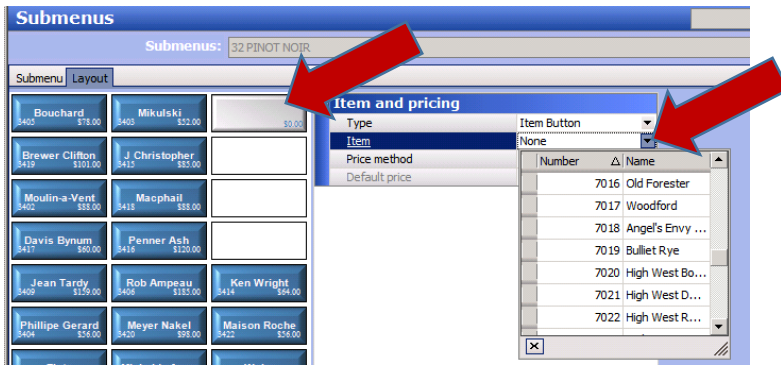
- Once in the Submenus, click the dropdown and select the correct submenu you want to add the item to (if it's a lunch main, then select lunch mains; if it's a Beer, then select Beer; etc).



- Once in the correct submenu, click the layout tab.



- In the layout window, click on one of the white boxes (an empty box) to create a new button.
- On the right-hand side, click on the dropdown and scroll through the list of items until you can select the item you just created (this is where it is nice to have the item number handy).

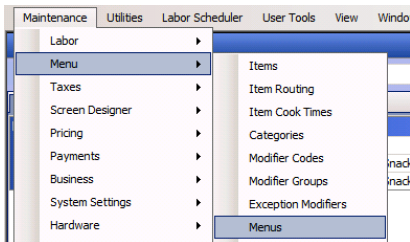


- ***Pro Tip***
 - You can also copy an existing button and paste it into an empty cell, so you don't have to scroll through the long list of items to find the one you were looking for (since all the items on the submenu should be in the same item number block).
 - Once you've selected the item and it is located on the menu where you want it, click save and "Yes" for the real-time update.

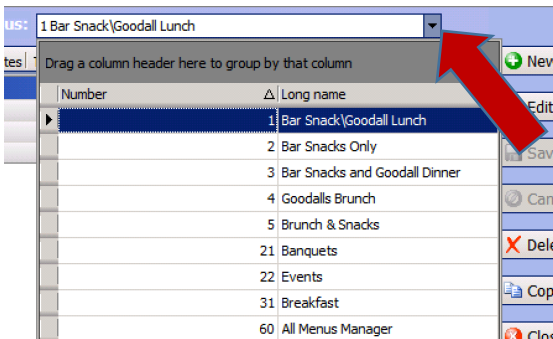
Adding Submenus to Menus

Menus are assigned via Events (we'll get there later). However, if you need to add a submenu (Lunch Sides, or Beer, or White Wine) to a Menu (the list of button in the middle of the ordering screen), then follow this.

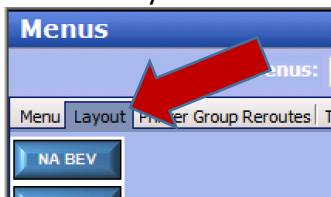
- Go to Maintenance -> Menu -> Menus



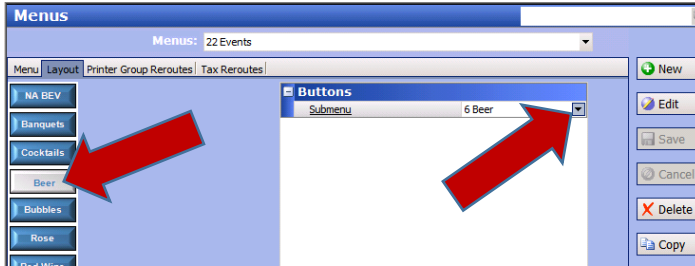
- In the Dropdown box near the top, select the appropriate menu. If you are unsure which one, you can consult the Event Schedule to see what menu is assigned to the user who needs the new submenu panel.



- Once you have selected the menu that you'd like to add the Submenu panel to, click the layout tab, so view the button layout.



- Once in the layout tab, you will see the button layout. You can click the Double-Down arrows to scroll through the pages of buttons. Once you find an open space, click in the space. Then on the right-hand side select the desired submenu. Then click save.



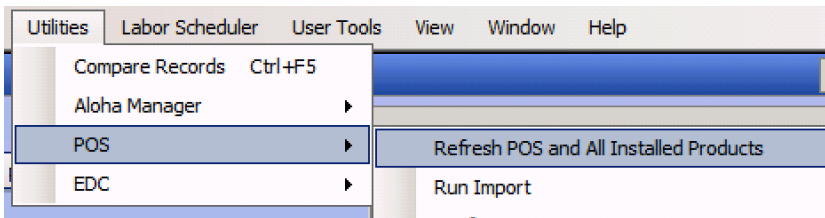
- You will need to refresh the system for the changes to take effect.

System Refresh

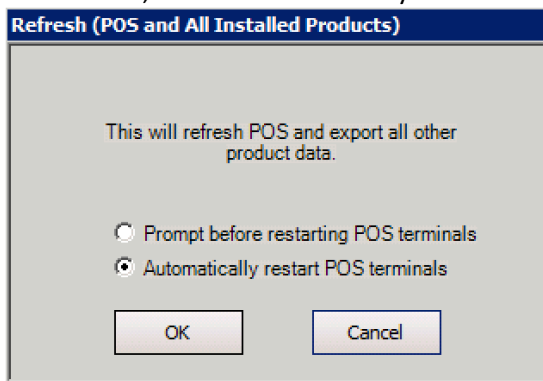
Once you have made a system change, you will need to refresh the system for the changes to take effect. Refreshing the system will cause the terminals to either restart or log out and back in. You should expect a refresh to take anywhere from 2-6 minutes depending on the age of the hardware installed.

To perform a refresh:

- Go to Utilities -> POS -> Refresh POS and All Installed Products



- At the next window, select "Automatically restart POS terminals" and click "OK"



- A box will pop up showing the progress of the system changes. It will then pop up a box saying the update is complete and that the terminals should be restarting now.

Adjusting who sees what Menus and when

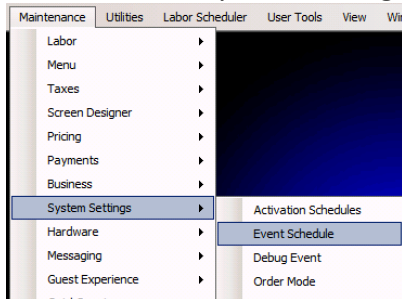
Menus are the groups of submenus that are displayed to users. Aloha allows you to have different menus for different users, based on the Job Group that their jobcode is part of when they are clocked in as. So when a user is clocked in as a bartender, they see menus specific to Bartenders, but when they clock in as server, they would see a different menu designed for Servers (depending on how you have the system setup).

You can also apply different menus to users based on the time of day. So in the morning, you can have a Breakfast/Brunch only menu displayed, but when it's time to start selling lunch, the menu will automatically change to lunch only items (so people can't sell breakfast items once the kitchen has switch to lunch items). The initial application of the menu, plus any changes throughout the day, are handled in the Events section of Aloha.

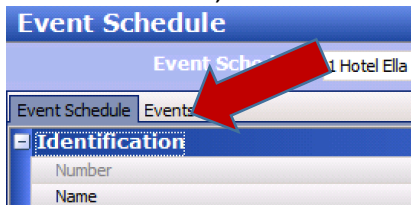
For the sake of this example, we are going to change the time the dinner menu shows up on the Server Group, so that it shows up at 4:30pm, instead of 5pm.

To adjust a menu for a specific Job Group (Job Groups are assigned via the JobCode. Go to the Job Code to see what Group it is assigned to):

- Go to Maintenance -> System Settings -> Event Schedule



- Once in Event Schedule, click the Events tab.



- Once you are looking at the events tab, you will see a long list of events. If you are adjusting a previous menu, then look for the JobGroup you want to change. In the case of this example, it would be the Server JobGroup. Scroll down until you see the Event that says "Set Menu for Job Group Server". Then Look for the appropriate time of day.

A screenshot of the 'Events' list in the Event Schedule interface. The list has columns for Description, Activation schedule, Start time, Start date, and End date. A red arrow points to the 'Set Menu for Job Group Server 3 to Brunch & Snacks Only 2' event, which has a start time of 17:00. Another red arrow points to the 'Start time' column for this event.

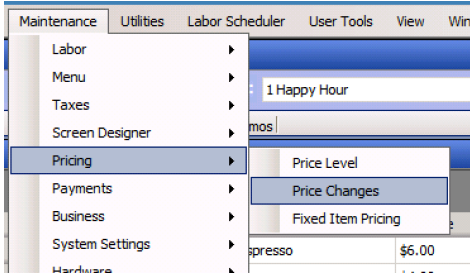
Description	Activation schedule	Start time	Start date	End date
Set Menu for Job Group Server 3 to Breakfast 31	6am 7 days	06:00	None	None
Set Menu for Job Group Server 3 to Bar Snack\Goodall Lunch 1	11am M-F	11:00	None	None
Set Menu for Job Group Server 3 to Bar Snacks Only 2	3pm M-F	15:00	None	None
Set Menu for Job Group Server 3 to Brunch & Snacks Only 2	5pm 7 days	17:00	None	None
Set Menu for Job Group Server 3 to Brunch & Snacks Only 4	Brunch 7am Sat\Sun	07:00	None	None
Set Menu for Job Group Server 3 to Brunch & Snacks Only 1	11am Sat\Sund	11:00	None	None
Set Menu for Job Group Server 3 to Bar Snacks Only 2	230pm Sat\Sund	14:30	None	None
Set Order Screen Panel for PM Server 314 to Query 1	Always	00:00	None	None
Set Order Screen Panel for Managers 1 to Query 1	Always	00:00	None	None
Set Order Screen Panel for AMServ-Sup 313 to Query 1	Always	00:00	None	None

- In this case, we would change the Start time from 17:00 (5pm) to 16:30 (4:30pm). Then click save.

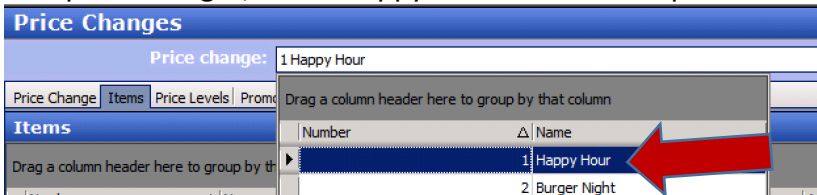
Change Happy Hour Prices

Happy Hour pricing is setup as an event and a price change. The event (start happy hour) initiates a price change, based on a previously defined "Price Change" setup in the system. If you want to modify the existing Happy Hour pricing, you'll want to go to the Price Change and edit it there. Let's take a look at how to do that:

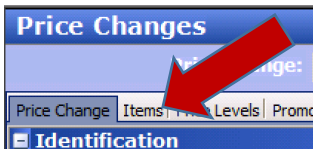
- Go to Maintenance -> Pricing -> Price Changes



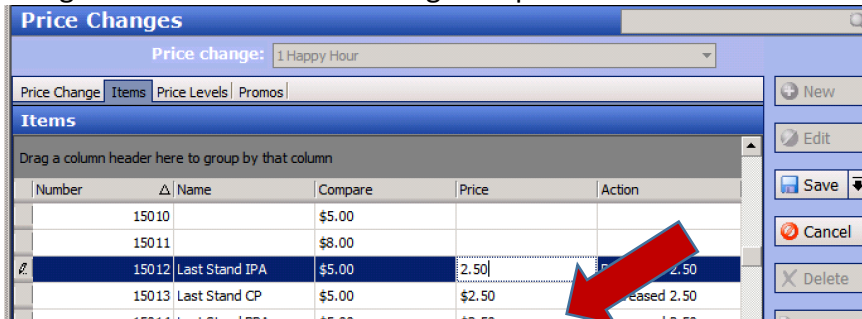
- Once in the price changes, select Happy Hour from the drop-down menu.



- Once you have selected the correct Price Change, click on the Items tab.



- Scroll through the list of items and change the prices as needed. Then hit Save.



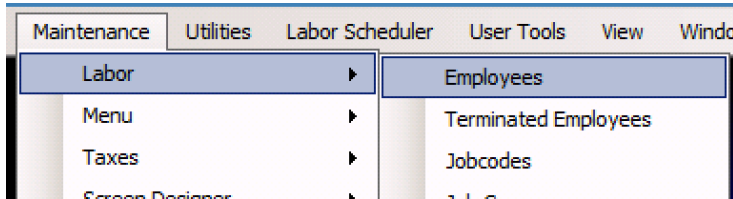
That all there is to changing existing Happy Hour pricing.

Please note, you will need to run a POS Refresh to the changes to take effect.

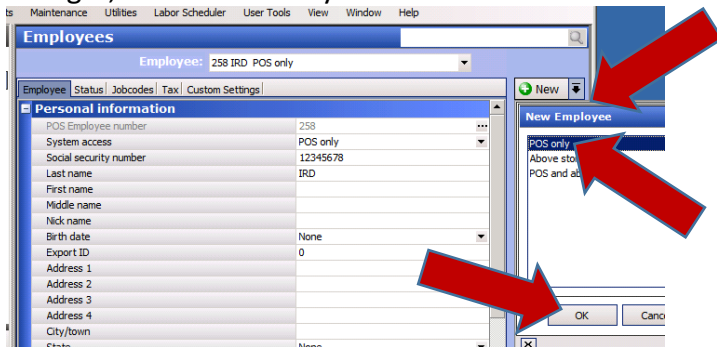
Entering New Employees

When a new employee is hired, you need to get them setup in aloha. It is important that you set them up correctly, so payroll and reporting is correct. Before you enter them in Aloha, you need to make sure they have already been on-boarded and setup in our HR/Payroll suite (currently Paylocity). Once they have been setup in the payroll and HR suite, follow the setup below to get the new employee setup.

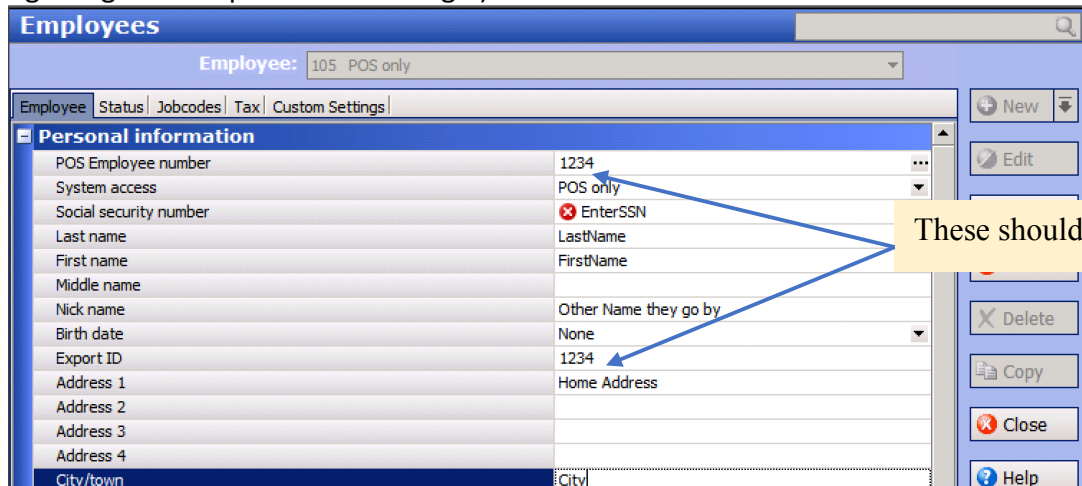
- Go to Maintenance -> Labor -> Employees



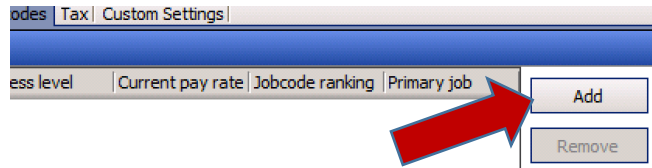
- Once the window opens, click the down arrow next to New, on the right-side of the screen. Then, if this is a non-manager, select "POS only" and click OK.



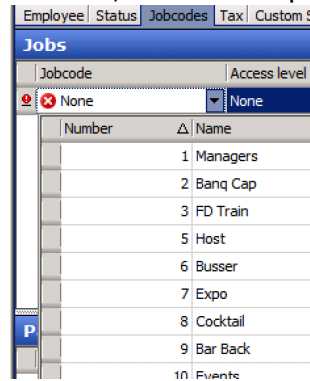
- Then, fill out the new employee's information.
 - Their employee number needs to be the last four of their SSN.
 - If the first number is a 0, then use a 9
 - IE, if the last four of their SSN is 0767, then you would make their Employee Number 9767
 - If you had to substitute a 0 with a 9, and that number already exists, then use a double 9.
 - IE, if the last four of their SSN is 0767, and 9767 already exists, then you would make their employee number 9967
 - Please enter their entire SSN in the Social Security Number field
 - Their export ID needs to be the last four of their SSN, so it should match their Employee Number (including using the 9 in place of a leading 0)



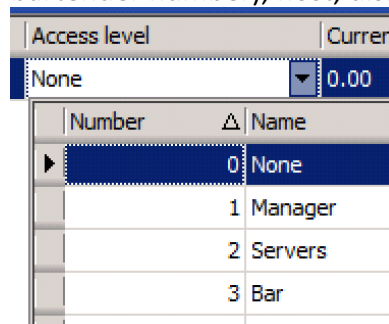
- Click on the Status Tab, and change the start date to the correct start date (either today, or a past or future date).
- Click on the Jobcodes tab
 - Click the “Add” button.



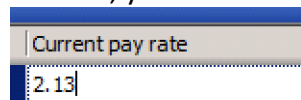
- Under JobCode, click the dropdown arrow and select the correct jobcode.



- Once you have selected the correct JobCode, click the dropdown for Access level (this will determine what they can do at the terminal).
 - Select the appropriate Access level (Server, Manager, etc). They shouldn't need access to the POS if they are a busser, runner, bartender (since we use a single bartender number), host, dishwasher, or etc. In that case, leave it set at None.



- In the next box, you'll need to enter their current pay rate.

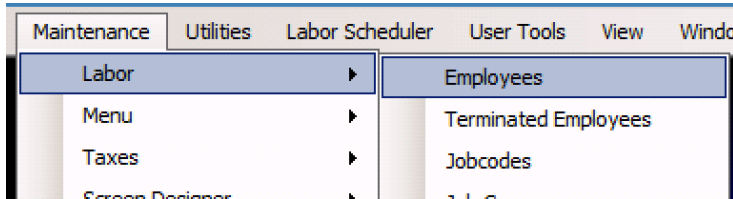


- If they are going to be working multiple jobs, you'll want to repeat this process to add all of their jobcodes.
- Hit Save.
- You should be able to login using this employee's number (the last four of their SSN).
 - If you are using a new JobCode, you'll need to do a system refresh
 - If this employee is a Manager, you'll need to make sure you setup a MAG card for terminal access.

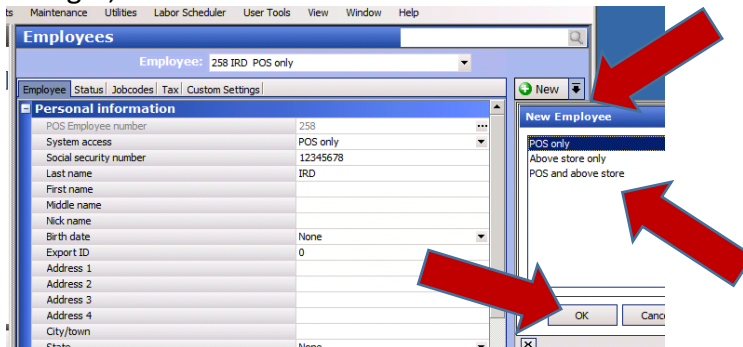
Entering a Manager

When a new manager is hired, you need to get them setup in aloha. It is important that you set them up correctly, so payroll and reporting is correct. Before you enter them in Aloha, you need to make sure they have already been on-boarded and setup in our HR/Payroll suite (currently Paylocity). Once they have been setup in the payroll and HR suite, follow the setup below to get the new manager setup.

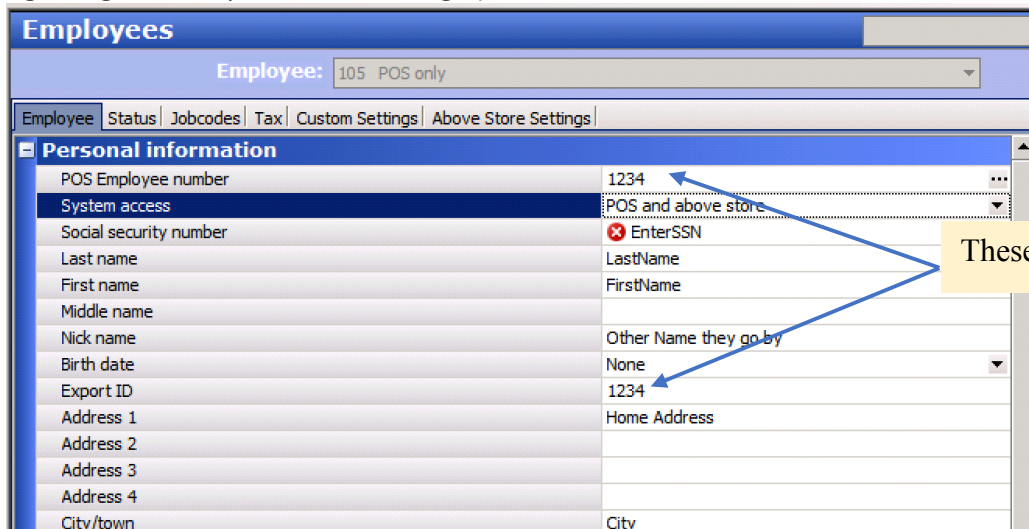
- Go to Maintenance -> Labor -> Employees



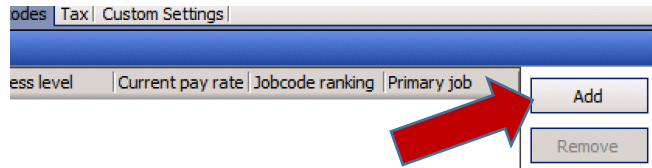
- Once the window opens, click the down arrow next to New, on the right-side of the screen. Then, if this is a non-manager, select "POS and above store" and click OK.



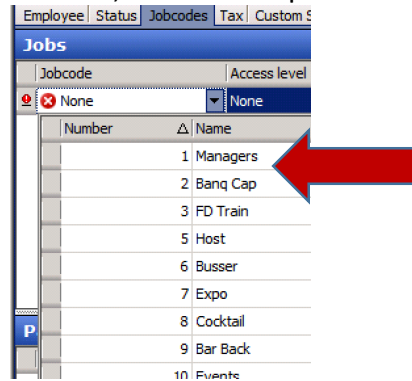
- Then, fill out the new manager's information.
 - Their employee number needs to be the last four of their SSN.
 - If the first number is a 0, then use a 9
 - IE, if the last four of their SSN is 0767, then you would make their Employee Number 9767
 - If you had to substitute a 0 with a 9, and that number already exists, then use a double 9.
 - IE, if the last four of their SSN is 0767, and 9767 already exists, then you would make their employee number 9967
 - Please enter their entire SSN in the Social Security Number field
 - Their export ID needs to be the last four of their SSN, so it should match their Employee Number (including using the 9 in place of a leading 0)



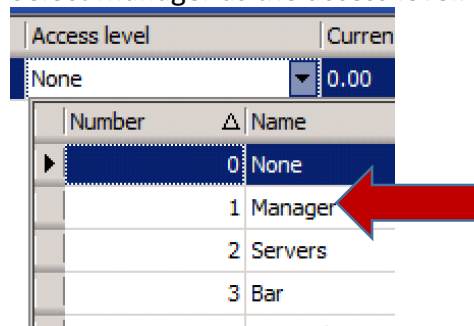
- Click on the Status Tab, and change the start date to the correct start date (either today, or a past or future date).
- Click on the Jobcodes tab
 - Click the “Add” button.



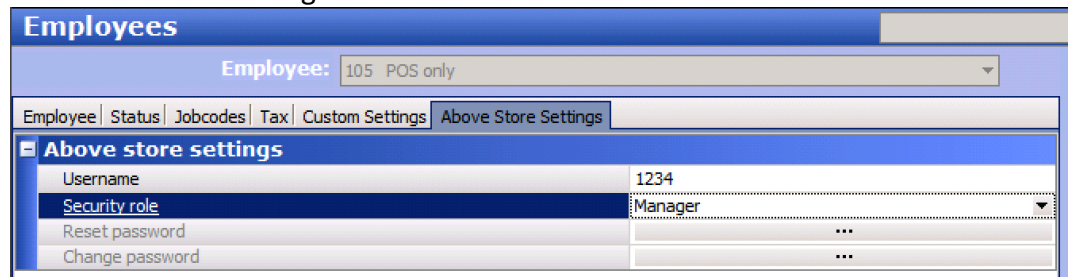
- Under JobCode, click the dropdown arrow and select Managers.



- Once you have selected the correct JobCode, click the dropdown for Access level (this will determine what they can do at the terminal).
 - Select Manager as the access level.



- You can leave the payrate at \$0.
- Hit the Above Store Settings Tab
 - Enter their number again, to be used as their login ID for Aloha Manager
 - Set their access level to Manager

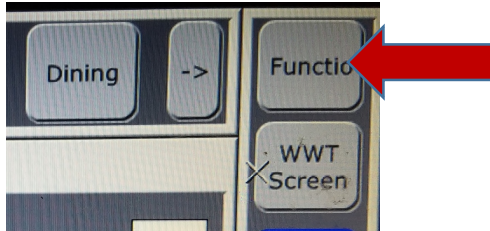


- Hit Save.
- You should now be able to login using this manager’s number (the last four of their SSN).
- You need to make sure you setup a Mag card for terminal access, as managers are required to mag cards.
- The managers password for Aloha Manager is nothing (it’s blank). When they login the first time, they will be asked to setup a password.

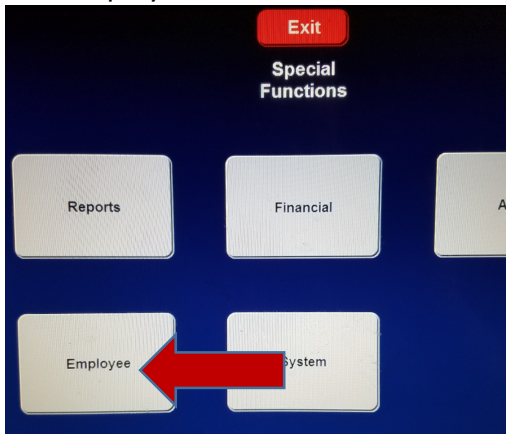
Setting up a Mag card

You can setup any employee to use a mag card, but Managers are required to use them. Follow this process to setup a user to use a mag card.

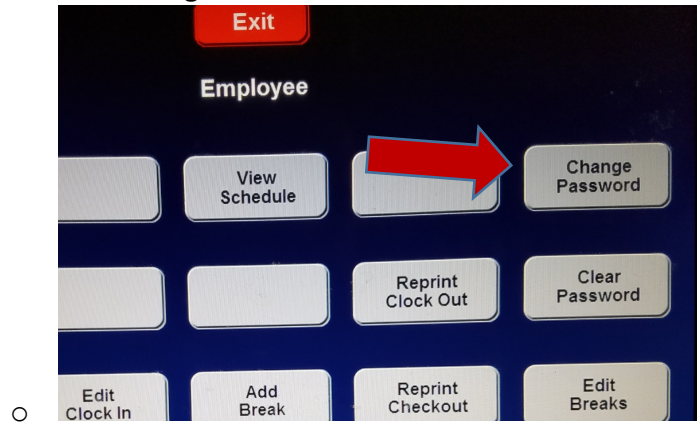
- At the terminal, have the user login.
- Go to the functions screen.



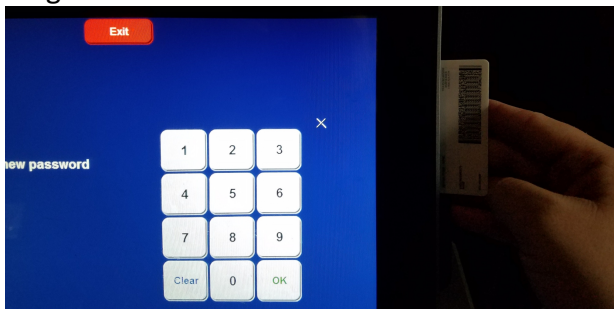
- Click on Employee



- Click on Change Password



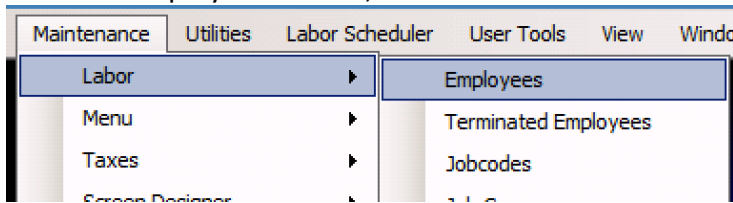
- You should now see the “Enter New Password” screen. Here you simply need to swipe whatever card you want to use as your card. You can use Gift Cards, driver’s licenses, credit cards, or just about anything else you might want.



- If for some reason you forget your card at home, or your card stops working, simply login to Aloha Manager, and change your password back to 4 digits. Then, go back to the terminal and make a new card.

Terminating an Employee in Aloha

- To terminate an employee in aloha, Go to Maintenance -> Labor -> Employees



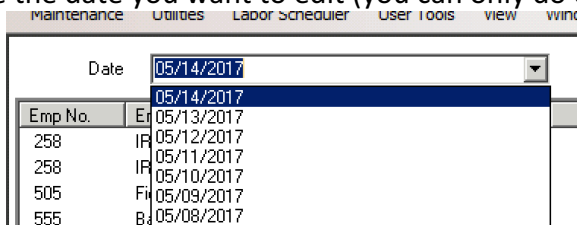
-
- Search for the employee you are going to terminate.
- Click on the Status tab
- Change their status from “Active” and “Terminated”
- Enter all of the termination information (reason, last day, etc).

Adjusting Employee Hours

If you want to edit an employee’s hours that were entered today, you’ll need to do it from the Terminal (under functions). If you want to edit an employee’s hours for a previous day, you’ll need to do it from Aloha Manager.

To do it from Aloha Manager:

- Go to Functions -> Edit Punches
- Choose the date you want to edit (you can only do one day at a time)



-
- To delete a punch, highlight it and hit delete.
- To add a punch that is not currently there, hit Add, select the employee from the dropdown (*ProTip* you can type their employee number in this field and it will find them).
 - Fill out the in and out times, and the correct jobcode (payrate should auto populate after choosing their jobcode), then hit save
- Hit done when you are finished with all edits, for all days, to exit

Troubleshooting

- If terminals show “Cannot find File Server”
 - This means the terminals cannot talk to the server in the back office. Chances are it is either off, or is in the process of restarting. If it does not start working within 10 minutes, call your local POS Reseller right away to open a ticket, and send an email to it@newwaterloo.com.
 - It is VERY helpful to know if this happening with just a single terminal, or all of the terminals in the restaurant.
 - Other helpful information to include:
 - Does the internet work?
 - Does it look like the server is on (is the power light on? If your server has a screen, does it say anything on it?)?
- Printer isn’t printing
 - Make sure all the cables are securely connected to the printer.
 - Is it powered on?
 - If it’s not on, make sure the power cord is securely connected to the wall, and into the black power-brick that is between the wall and the actual printer.
 - Does it have paper?
- Can’t comp specific items with any of the Comps.
 - Have you verified that the items are in the correct Category? ALL items must be in the all items Category. If they weren’t added to the All Items category, then you will not be able to comp them using most of the Comps.
- Can’t comp specific item with NW Employee or Investor
 - If the item was newly created, chances are it was not added to the Food&NABev category. Items must be added to the Food&NABev category in order to be Comp’d via the employee and Investor comps.
- Can’t bill to guest room (Hotel)
 - If you can’t close a check to a guest room, the most common culprit is the Infor Liaison Service is not running on the Infor liaison PC. If you don’t know what this is, call your IT dept (not your local POS reseller, as they won’t know what you are talking about).
 - If you do not what this is, make sure the Liaison service is running and the interface is “Processing”.

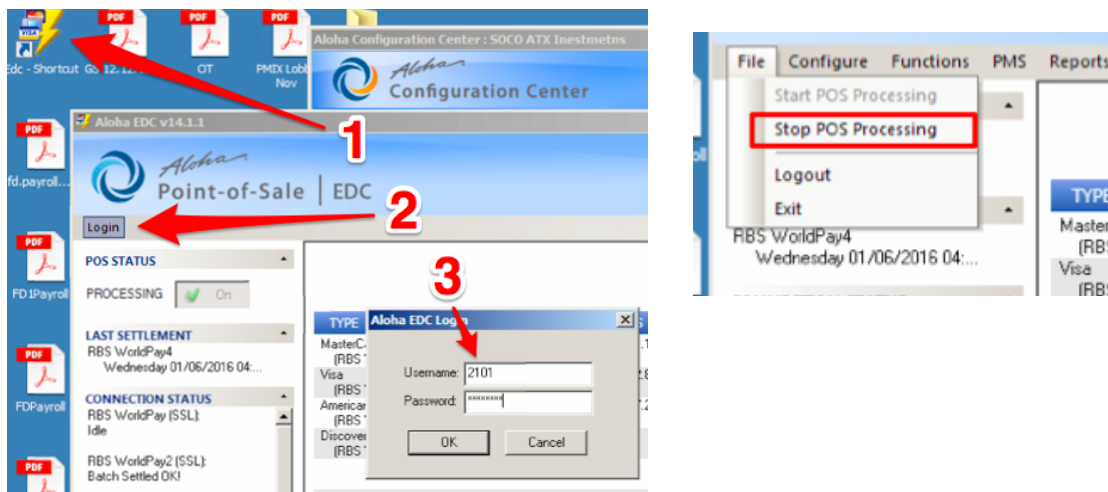
Process	Stop	Start	Info	Monitor	Log	Config	IDB	Notify	Queue	Exit
System Active			Mgmt Svcs Active						Queue Monitor Active	PCI Encryption Disabled
Task			Port	Interface		Type	Status			Message
POS				POS		Comm	Processing			16:58 Connected. (No activity since startup.)
IDB Manager			\$DB001			IDB Mgr	Idle			15:56 Processing folio notification transaction 01

EDC Offline mode (If the Internet Goes Out)

If the internet goes out, you'll need to put EDC (Electronic Draft Capture) in offline mode, so it will cache Credit Card transactions. This way, once internet is restored (and you enable processing in EDC) it will process all of the pending transactions.

To put EDC in Offline Mode

- First and foremost, call your local Aloha reseller and open a ticket (in Austin, this is POS Solutions). They will need to do a system backup before we re-enable EDC, so the sooner you open a ticket, the better. If the database gets corrupted, we could end up spending a LOT of money getting the issue resolved (if it can be resolved).
- Email the IT dept (support@newwaterloo.com) so they are aware of the issue and are available to help troubleshoot, if needed.
- From the Aloha Server desktop, click on the icon that says EDC. If you don't see one, login to Aloha Manager, click File -> Launch EDC.
- Click the 'Login' button at the top left, and login using your Aloha credentials.
- Once logged in, click File -> Stop POS Processing



That's it!

Once internet connectivity is restored, reach back out to your reseller and let them know, so they can remote into the server, take a backup of the database, then put EDC in Processing Mode. At that point, all of the transactions will be processed.

If for some reason, your local POS reseller doesn't call you back in time, or isn't responsive, send another email to support@newwaterloo.com, letting the IT dept know you aren't hearing back from them. Then, log back into EDC, hit File -> Start POS Processing. It will process all of the pending transactions. Should anything mess up, you'll need to follow up with IT and your local reseller.