

# Aloha Manager Table Service Basics

Welcome to POS Solutions classroom session of Aloha Manager Table Service basics. Today, we will be covering most of the day to day functions that you will be doing in Aloha as a Manager. The course will be approximately 1 hour with a Q&A session to follow.

Time is limited and we will be covering quite a bit of information. Please save your questions for the last 30 minutes and we will answer as many as we can. Thank you for coming and I hope you get a better knowledge and understanding of how to use our product.

Today we will discuss:

1. Adding Employees
2. Adding Items with Pricing
3. Adding Items to Categories
4. Adding Items to Submenus and Submenu Creation
5. Adding Modifiers and Modifier Panels
6. Price change events
7. Editing Punches
8. Basic Labor Scheduler set up
9. Reporting

## Adding Employees

You will need to add all employees who need to clock in to Aloha Manager in Employee Maintenance. This includes Managers, Servers, Bartenders, Hosts, Support Cooks, etc.

To do this: Maintenance->Labor->Employees

----On the right side of the screen, click the drop down arrow next to "+New".

This will give you options to pick what type of employee you are creating. There are options for POS Only (servers, bartenders, hosts, etc), POS and Above Store (GM, AGM, Managers, etc), and Above Store Only (Owners, Accounting, etc).

Select type by clicking on one option and then clicking ok.

#### Adding Employees Continued 2

The system will default to the first unassigned number to use for employee. You will want to change this to be a four digit number that will be easily remembered by employee. Most customers use the last four digits of that persons social security number.

Enter new number by clicking in the POS Employee Number line and typing the correct employee code. If you use a number that has already been used, the system will give you a red x and not let you save.

Fill in as many blanks as you can on this first Employee tab by clicking in each line and typing info requested.

Go to second tab called Status and set accordingly.

Go to third tab called Jobcodes and click Add under the Jobs heading. Select a job code out the drop down list by clicking on the black arrow to the right of none. Select an access level to match the job code. Enter an hourly pay rate.

You can add as many jobcodes as you need for this one employee. The more jobcodes you assign the more options the employee will have at clock in.

You can set up pay rate increases using the add under pay rates and entering an effective date with new pay rate.

The fourth tab over is Tax. This is info from the W-2 that can be entered.

The sixth tab over is Above Store settings. This will be set for above store employees. The username is the name or number that a person will use to log into Aloha Manager. Select a security role from the drop down list for this specific employee. The reset password and change password options are available if needed.

Click Save on the right side of screen.

Choose yes to real time update. This makes employee eligible for clock in on Front of House immediately.

# Adding Items

To Do This: Maintenance->Menu->Items

--Click the drop down arrow to the right of Item at top of Items maintenance screen. This will show you a list of already created items. To add to this list, simply scroll through the items until you get to the section you need. i.e. appetizers, entrees, desserts, etc.

## Adding Items Continued 3

### Item Tab

Click "+ New" on the right side of the screen.

Like employee editing, the system will default to the first unassigned number in the range you selected (apps, entrees, etc.).

Type a Short Name. This is the name that will show on the button on the POS screen.

Type a Chit Name. This is the name that will show on the Ticket that prints in Kitchen or Bar.

Type a Long Name. This is how the item is stored and what shows on the customer receipt.

If this is going to be an "Open Item" you can select Ask for Description on this screen as well.

Assign a Tax Group accordingly.

Select a Category to show sales correctly on reports.

**--Click on the Pricing Tab.** Set price to sell item in the Default Price line. To "ask for price" select that option under Pricing method. You only want to do one or the other here.

Click Save on right side of screen. You can disregard other tabs on this page for now.

### **--Modifier Tab**

This is how you will assign modifier panels to each item so you can make necessary changes to accommodate the customer. There is also the feature to combine price with base item. This allows you to merge an add on charge with the base item charge. For Example:

Nachos cost \$6.95 and adding Guacamole is an additional \$2.00. If you do not check this box, then the check will look like this:

Nachos \$6.95  
Guac \$2.00  
Sub Total: \$8.95

#### Adding Items Continued 4

With it checked:

Nachos \$8.95  
Guac  
Sub Total \$8.95

You can add up to 10 modifier panels per item on this tab. This allows you to make necessary changes to your original item. Examples of modifier panels would be: Temperatures for meat, Condiments for Sandwiches, or Mixers for drinks. We will cover building modifier panels later.

For Practice: Using steps above please build a Hamburger that sells for \$6.95 using item number 110.

\*\*\*\*All items built will be put in their respective Sales/Retail category. In addition to being assigned to this category, they will be added to the All Items category.\*\*\*

#### Category Maintenance

Categories are ways to track your sales of Food, Liquor, Beer, Wine, and Retail items separately. You can also make non sales categories to track specific sales of few items for a promotion, contest, happy hour, etc.

By default we build a Food Sales category, Liquor Sales Category, Beer Sales Category, and Wine Category. We will also have an All Items non sales category. As you add items you will need to assign them to one of these categories. You can create more, if needed.

## Item Routing

To do this: Maintenance->Menu->Item Routing

On this screen you will see a section titled Routing Assignment. The left column titled Available are all items in the database. The right column titled Included are items that need to be routed to either a print group or video group.

We consider it good practice to highlight all items in the available column by using the shift and click method. Then using the right facing arrows to move all items from available to included.

Once the items are in the included column, you can now select the proper routing by clicking the box under the printer group head and/or the video group heading and choosing the right routing group. Click Save on right side of screen when finished.

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## Submenu Creation

To do this: Maintenance->Menu->Submenus

Submenus are the panels that you will attach your Items to so that they can be available to sell. The middle row of buttons on the Front of House Terminal are your submenu buttons, These are usually named Appetizers ,Soups\Salads, Sandwiches, etc depending on the style of restaurant.

To add an Item to an existing submenu:

Select the submenu needed by clicking drop down arrow to right of submenus or type name on type right of Submenus header next to magnifying glass, then click magnifying glass.

Click the Layout tab. Select a blank white square from the panel of squares. To the right of that, under Item and Pricing, select the item by clicking the box next to Item. Choose Item Price for price method. Click save after assigning all items needed.

The item layout can be sorted alphabetically by column (Sort ^) or row using (Sort >) and you can group all buttons together by selecting the consolidate button.

**\*\*You can copy items to save time. If you are assigning a group of items that are all close in ID number it is easier to right click on the first item that you assign to the panel and choose copy. Right click on an open (blank) square and choose**

paste. Then, in the item line under Item and pricing and choose the next item from the drop down list. This will save you time by not having to scroll through the whole list of available items.

To create a NEW submenu to add to the full Menu:

Click +New on the far right of screen. Enter a short name and a long name. You can change the ID number if you like. Click on Layout tab and add items as described in the previous section.

You will need to add the Submenu to necessary Menus by going to Menu Maintenance. Choose the menu from the drop down list, click on the layout tab, find a blank square in the column on the left, and add by selecting the submenu from the list of submenus under the buttons header. Repeat for all menus that need this particular submenu.

Menus allow sorting and consolidation as well.

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For Practice: Create a submenu called Sandwiches using ID 10 and add Hamburger to this layout.

# Modifier Panels

To do this: Maintenance->Menu->Modifier Groups

Modifiers are ways for you to make changes to a parent item. In our item example, we created a hamburger. Now, we need to be able to make the hamburger how the customer requests. We let the kitchen know how to do this by using modifier panels. Examples of modifier panels for our hamburger would be a temperature panel, condiment panel, an add on panel, and bun choice.

The modifier panel layout and functionality is very similar to Submenu maintenance. You change buttons under the layout tab exactly like Submenus. You choose your Mod panel just like Submenus as well. To add a new panel, click +New on the right side of screen.

You will want to use Button pricing as your pricing method on the modifier panel. So, price will be entered on this screen as opposed to the item screen for modifiers.

You can set limitations to Modifier panels. There is a line that can be configured to require at least one item be selected from the mod panel (minimum), you can set a maximum amount of items that can be picked, you can give a specific number of items "Free" before charging extra, or you can make the screen flow to a specific panel for viewing without having to choose something specific using the screen flow required

option. This screen can also be organized alphabetically by column or row automatically and has the consolidate option.

For practice: Please create a Sandwich Adds panel using id 15000 using the steps above and from Submenu maintenance. Please add Avocado, Bacon, and Cheese all for \$.75 each. Click Save.

\*\*\*To make a mod panel active you will need to assign to an item. To do this, go to Item Maintenance and find your item (hamburger). Click the modifier tab. Under the Modified by header assign appropriate panel (Sandwich Adds) to one of the Modifier lines.

## Refresh

To summarize, we have built an item. Added the item to the Submenu. Added a modifier panel to the item. Now, so we can sell the item, we need to do a refresh. This will send all changes made in Aloha Manager to the terminals on the Front Of House.

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Refreshing will cause the system to cycle off and on. You want to use caution when refreshing during peak hours. This can have negative effects if someone is in the middle of entering an order or running a credit card.

## Price Change Events

To do this: Maintenance->Pricing->Price Changes

Price Change events allow you to discount items at a specific time throughout the day automatically. Happy Hour is a good example of a price change event.

Creating a Price Change:

Click +New on the right side of the screen.

Fill in Number, Name, Activation Start Date and End date on the Price Change tab.

Click on Items tab and select the item you want to discount. Enter discounted price for item in the price column. The action column will tell you how much you have decreased the price. The Item you are discounting does need to use Item level pricing.

Click Save.

To Activate a price change:

Maintenance->System settings->Event Schedule

You should have an Imported Event Schedule already showing with ID 1. On the right side of this “schedule” you will see Add and a drop down arrow. Click the drop down arrow to give you options for the next event to add to the schedule.

Choose Activate Price Change and click ok.

On the bottom half of screen you now have a section to assign the price change. Choose HH from drop down list next to Price Change. You can assign a revenue center if you like but it is not required.

Now click on the Activation Schedule in BLUE on the right of screen under the Add button you clicked earlier. You will need to build an activation time for this event if one does not exist. So, if HH runs M-F from 4-7 we need to create that so we can assign to our HH price change event.

Click the black drop down arrow next to new on the top right. Give the new activation schedule a name. Something like “HH M-F 4pm” so you know what it is when you see it 6 months from now. Uncheck Start of day and enter a time that you want your event to start in Military time.

Check days of the week to run event.

Click Save.

On the left side of screen go back to Event Schedule by clicking on it.

For you HH event assign the new activation schedule in the activation schedule column.

You will have to repeat this process to Disable the Price Change at a specific time so HH discounts stop.

## **Edit Punches**

You can edit employee times, hourly rates, tips declared, and job code type on a daily basis for prior days using Aloha Manager. This is real time adjustment to the Labor Report.

To Do This: Functions->Edit Punches

This will default to the previous day. You can select an employee by clicking on that person and choosing Edit. This will open a window so you can adjust accordingly.

This feature allows you to add people to the day that did not clock in at all and also remove employees, such as salary employees that do not need to be recorded.

## **Basic Labor Scheduler**



To do this: Functions->Basic Labor Scheduler

This feature allows you to build a weekly labor schedule to help keep track of hours and wages. It also allows you to use Punctuality.

Select Edit->Edit Schedule

Choose a week to edit. Generally, this will be the following pay period schedule.

Click Ok.

This opens the Labor scheduler interface.

Select the job code you want to build a schedule for by using the drop down list in the top middle of the window.

Select a day of the week by clicking on it on the top left.

Add employees to the schedule by clicking on a start time next to their name and dragging to the shift end time.

Repeat his process for every employee that you want to schedule for that day.

Then go on to the next day.

Once you have finished all job codes and days you will see a total hours and wages on the

top right of the screen. This can help you see you labor dollars projected for the week.

Click Save on the bottom of the screen

Click yes to update front of house terminals.

You can print the schedule by clicking report->employee schedule and choosing which type you want to print. This choice automatically starts the print job.

## Reports

We will cover 4 reports today. There are many more available to you and I recommend clicking around through them to see what will be useful to you.

The four reports we will use today are: Daily Sales, Employee Labor, PMIX, and Audit.

The **Daily Sales** is an all encompassing report that gives you data on Restaruant sales for the day (gross and net), taxes charged, sales by category, cc tenders, comps, void, desposit info and more.

### **To view this report go to:**

Reports->Aloha Point Of Sale->Sales->Sales->Summary.

Choose the date(s) you would like to see by clicking on them in order. Then click View, Print, or Export depending on what you need to do. You can adjust report by clicking on Settings button and rearranging the report to fit your needs.

The **Employee Labor Report** will give you daily or weekly hours for staff that you can use for payroll purposes.

**To view this report go to:**

Reports->Aloha Point Of Sale->Employee->Labor

This report is set up the same way. Choose your dates, choose your employees or select all option, and then click view, print, or export.

You have the settings button on this report as well. This will allow you to tune the report as you see fit for your accountant and/or payroll.

The **PMIX report** is your Product Mix. IT will keep a running total of product sales for the day, month, week, period, year, etc.

**To view this report go to:**

Reports->Aloha Point of Sale->Product Mix->Product mix

Choose the day and click view, print, export.

You can arrange the report using the settings button.

The **Audit Report** is a way to see what has been happening in the restaurant. Voids, comps, open checks, no sales, and it is the only place to see full credit card numbers.

**To view this report go to:**

Reports->Aloha Point of sale->Audits

Choose day

Select the data you would like reported and click view, print, or export.

You can choose a specific day part by entering a from and to time on top left.

# **Thank You!**

Thank you for attending our class today. Please take this handout with you for future reference. If you have any questions you can call us at 512.833.9840 or visit our website at [www.posstexas.com](http://www.posstexas.com).

Again, We appreciate your time today and hope the class has helped with your understanding of Aloha and some of its features.

