



**Advanced Ordering System for Aloha
Installation and Configuration Guide**

Version 1.0

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1 Overview

This document describes how to install and configure the Advanced Ordering System for Aloha.

2 Before you begin

2.1 A Note about Aloha Environment Variables

The Advanced Ordering System for Aloha software requires the following Aloha Environment variables to be properly set for installation and operation:

- IBERROOT (Front of House only)
- SERVER (Front of House only)
- LOCALDIR (Front of House only)
- IBERDIR (Back of House only)

The installation programs will automatically search the environment for these variables; if they are not found, the installation program will search the IBERCFG.BAT file in the following directories:

C:\
C:\ALOHA
C:\ALOHAQS.

If the installation program cannot find the file IBERCFG.BAT, the user will be prompted during the installation for the appropriate values of these variables.

2.2 Installing the Back of House Software

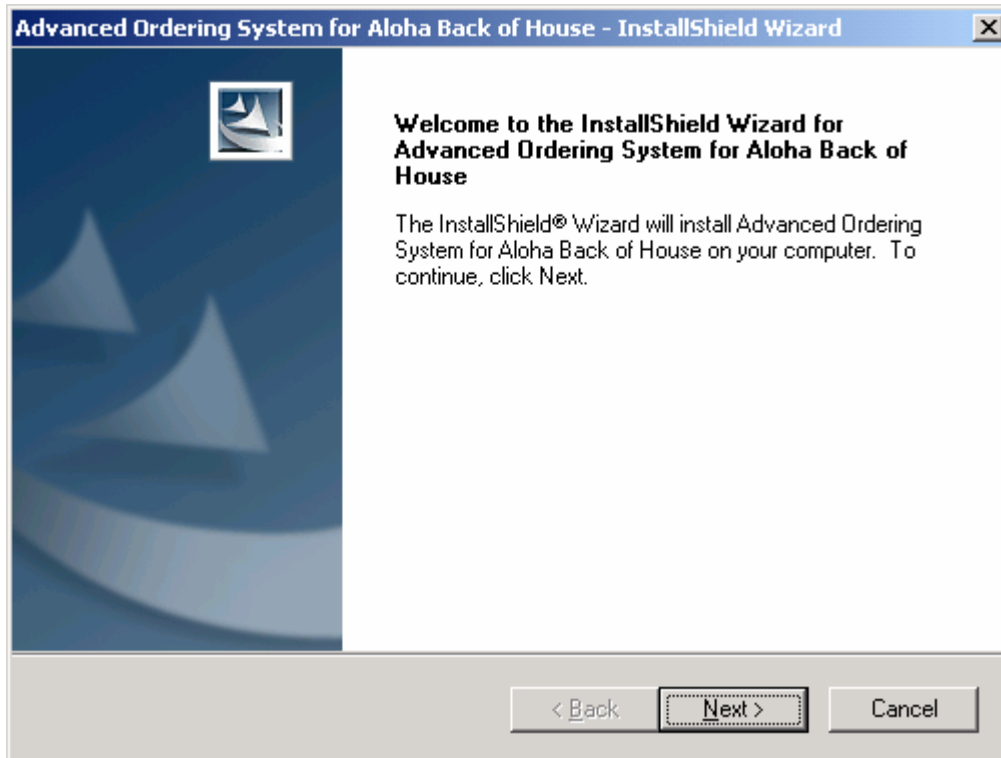
2.2.1 Dongle Installation

Your software came with either a USB or Parallel dongle.

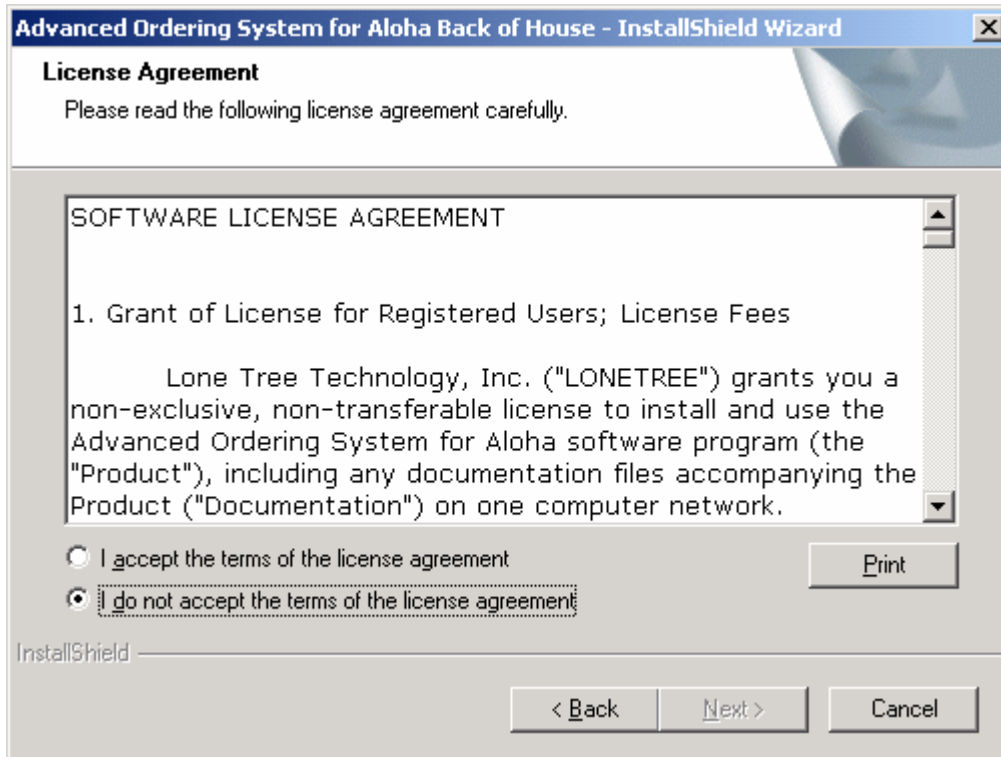
DO NOT INSTALL THE DONGLE UNTIL AFTER THE BACK OF HOUSE INSTALLATION IS COMPLETED!

2.2.2 Back of House Installation

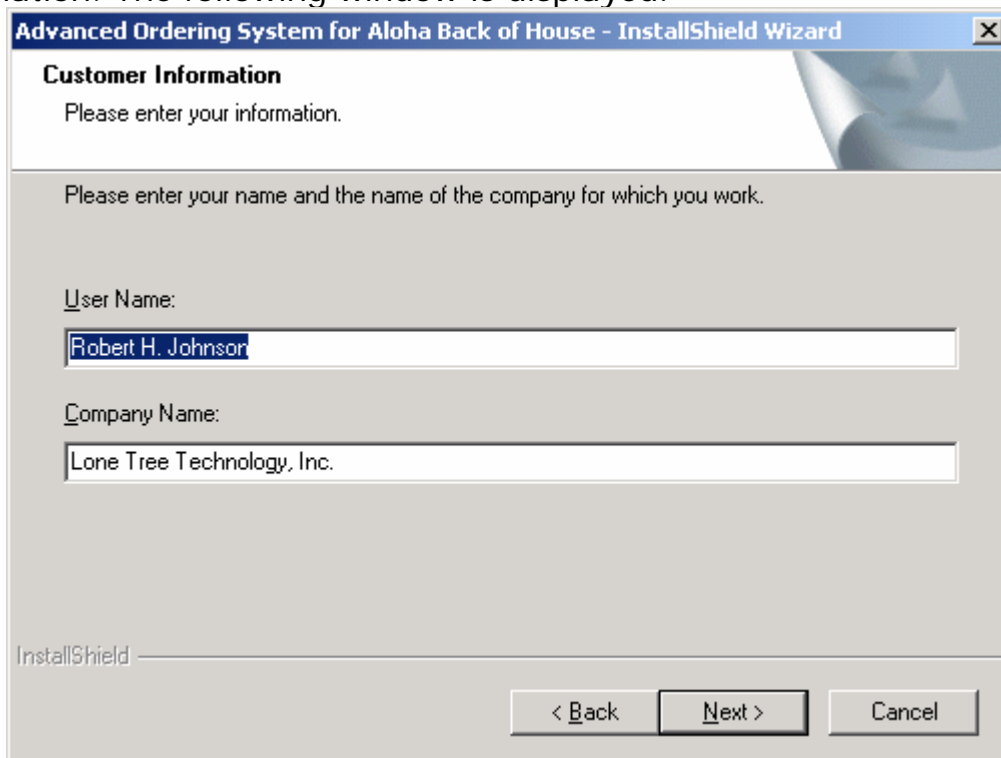
Locate the file: "AdvOrderBOHInstall.exe" and start this from your Back of House Server Machine. After several seconds, the following window will be displayed:



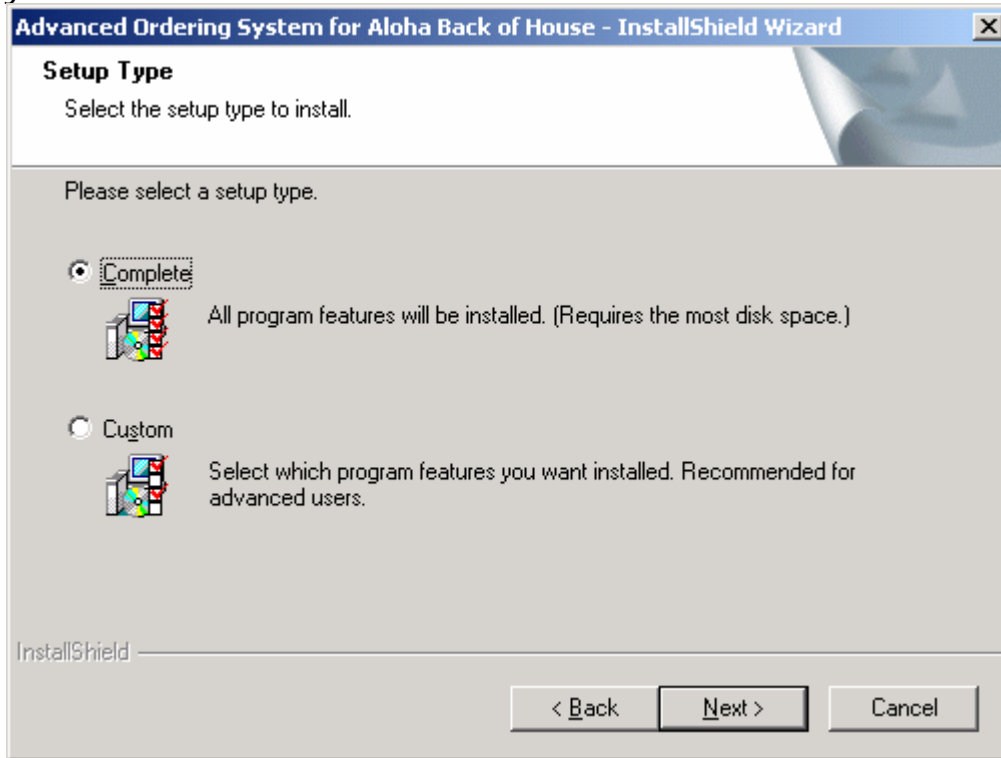
Click on the NEXT button to continue with the Installation. The following window is displayed:



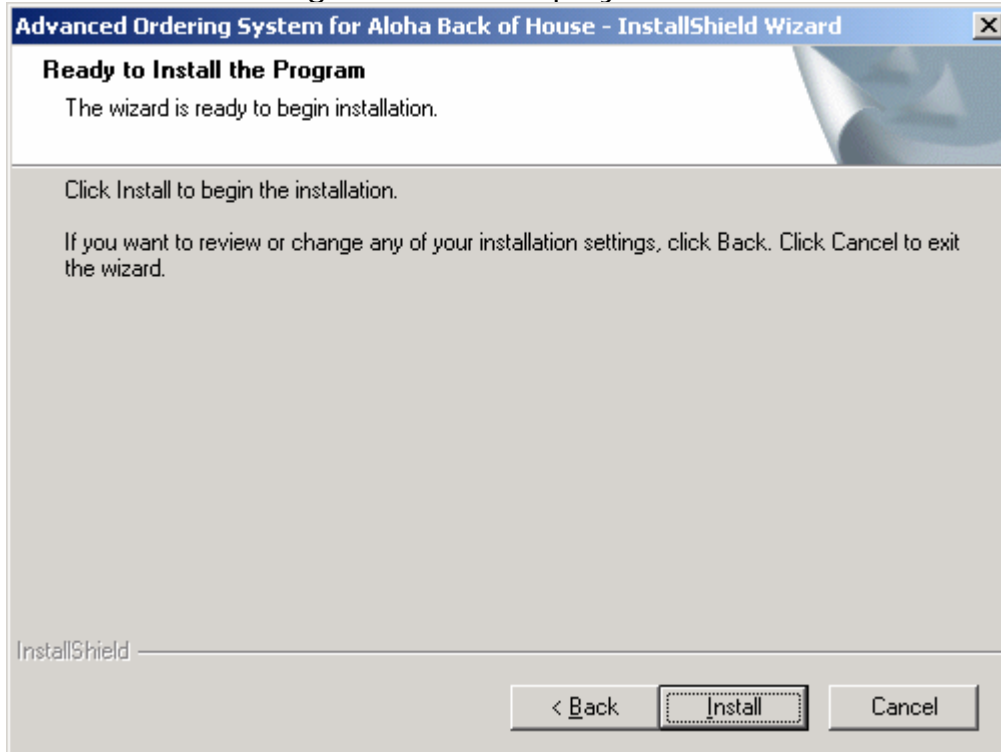
To accept the license agreement, click on "I accept the terms of the license agreement" and click on the NEXT button to continue with the Installation. The following window is displayed:



Enter the appropriate user name and company name and click on the NEXT button to continue with the Installation. The following window is displayed:

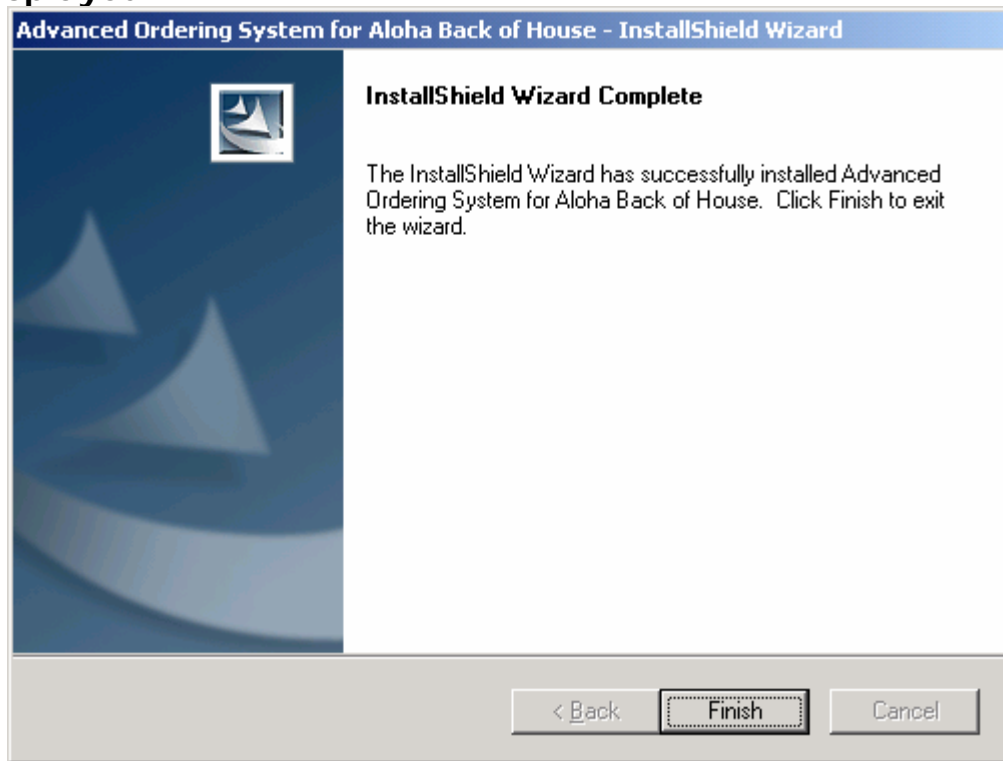


Select "Complete" and click on the NEXT button to continue with the Installation. The following window is displayed:



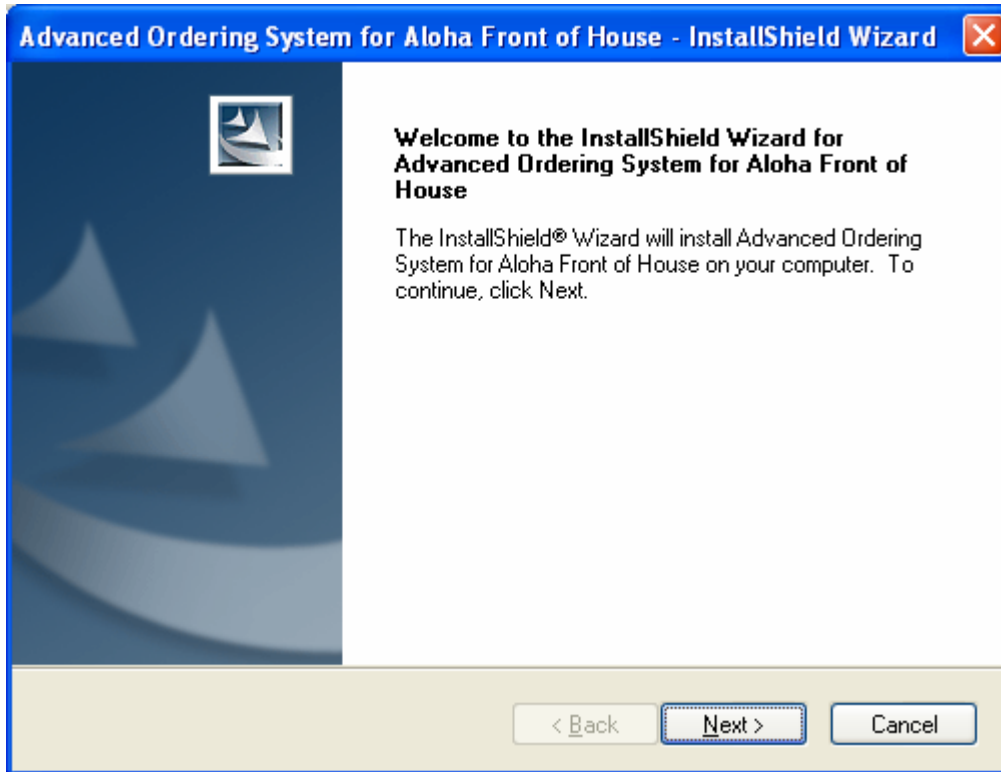
To finish the Installation, click on Install. The installation may take several minutes.

The installation IS NOT complete UNTIL the following window is displayed:

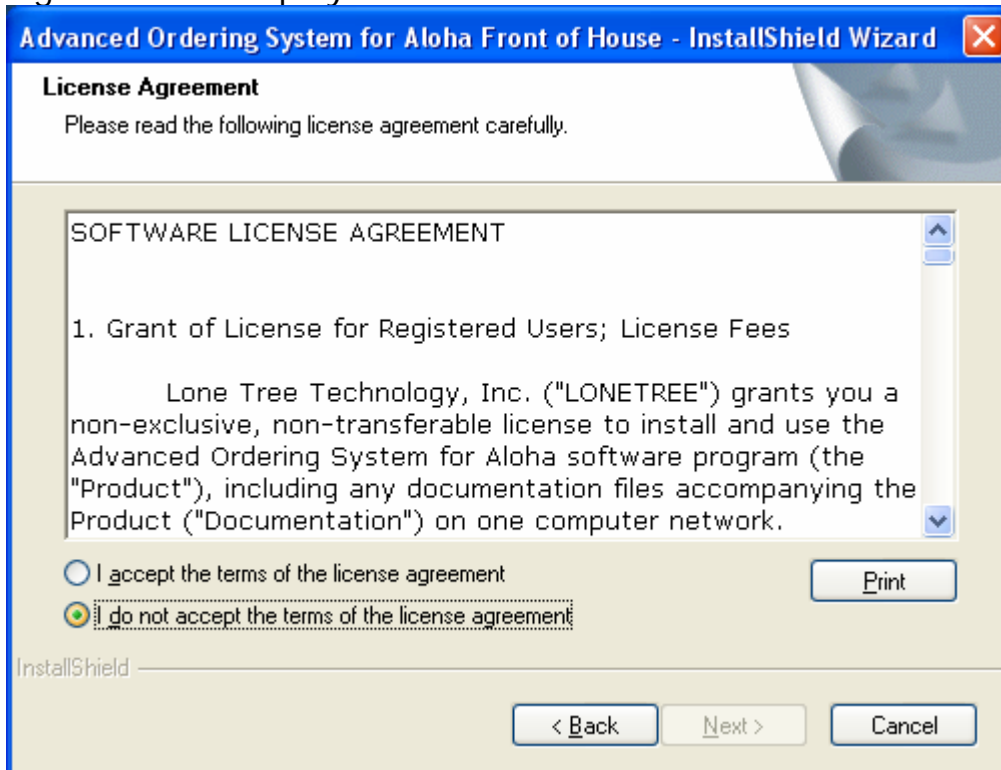


2.3 Installing the Front of House Software

Locate the file: "AdvOrderFOHInstall.exe" and start this from your Front of House Terminal Machine. After several seconds, the following window will be displayed:



Click on the NEXT button to continue with the Installation. The following window is displayed:



To accept the license agreement, click on "I accept the terms of the license agreement" and click on the NEXT button to continue with the Installation. The following window is displayed:

Advanced Ordering System for Aloha Front of House - InstallShield Wizard

Customer Information
Please enter your information.

Please enter your name and the name of the company for which you work.

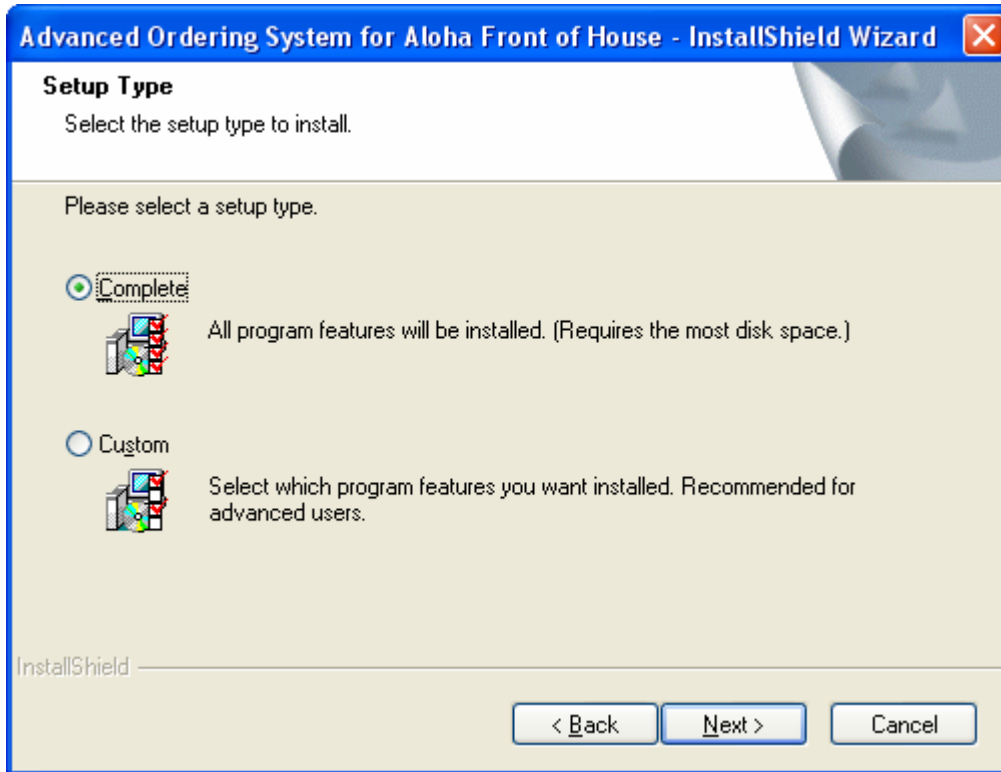
User Name:
Robert H. Johnson

Company Name:
Lone Tree Technology, Inc.

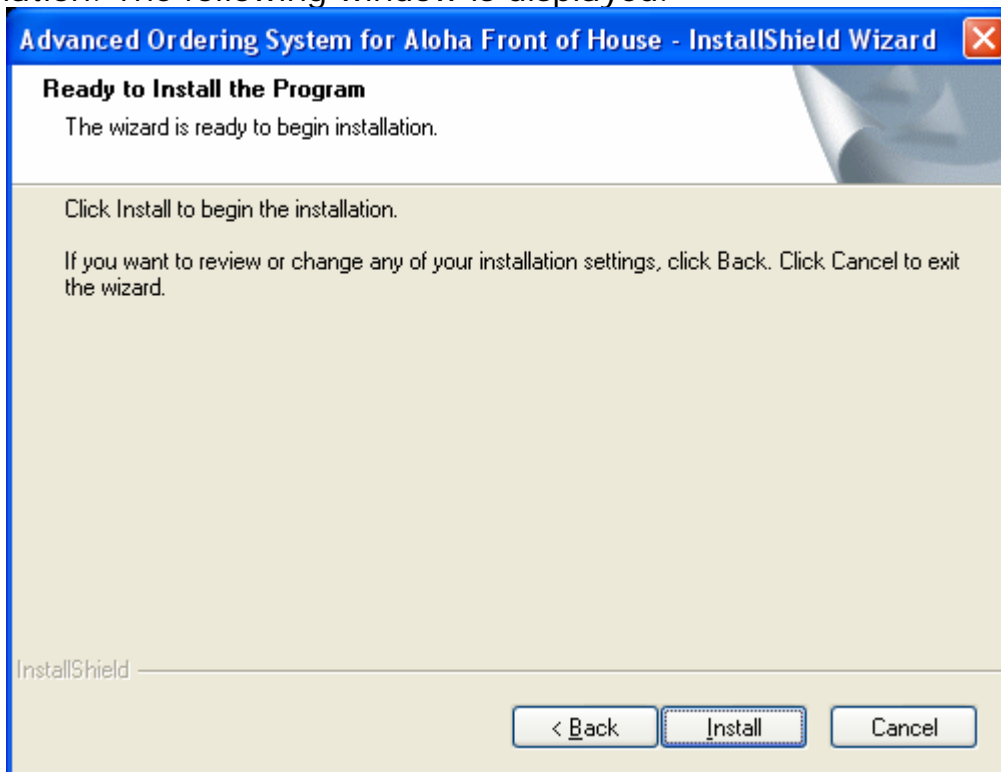
InstallShield

< Back Next > Cancel

Enter the appropriate user name and company name and click on the NEXT button to continue with the Installation. The following window is displayed:

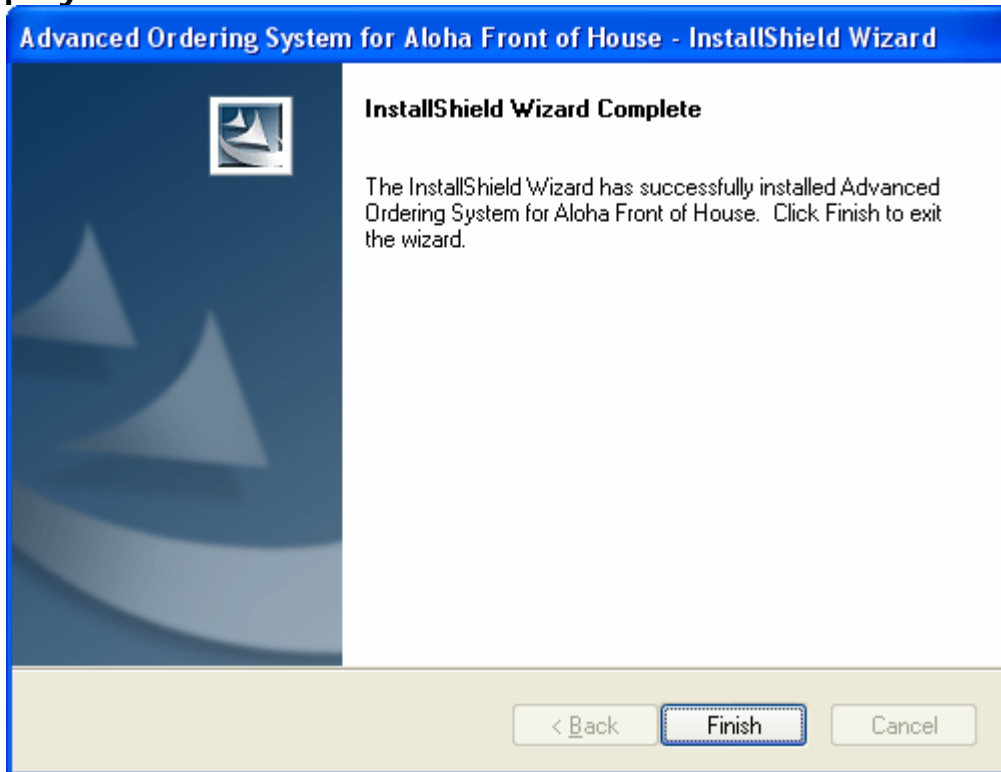


Select "Complete" and click on the NEXT button to continue with the Installation. The following window is displayed:



To finish the Installation, click on Install. The installation may take several minutes.

The installation IS NOT complete UNTIL the following window is displayed:

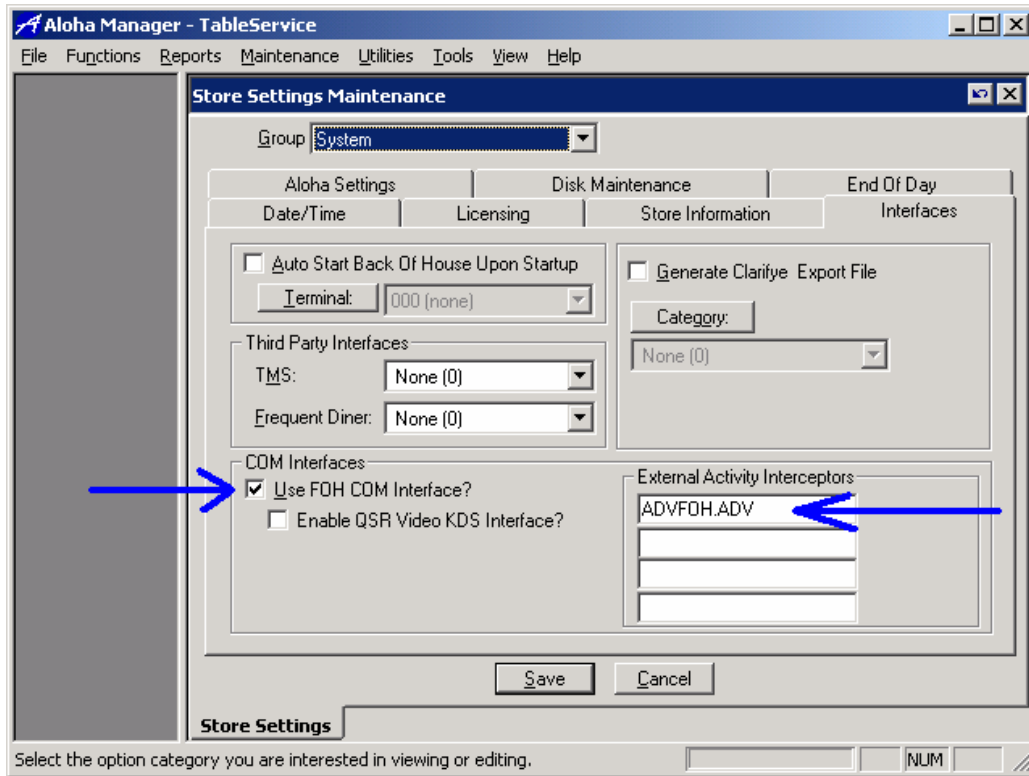


Restart the FOH Terminal.

2.4 Aloha Configuration

2.4.1 Initialize FOH COM

In Aloha Manager, select Maintenance, Store Settings, System Group, Interfaces Tab. The following window is displayed:

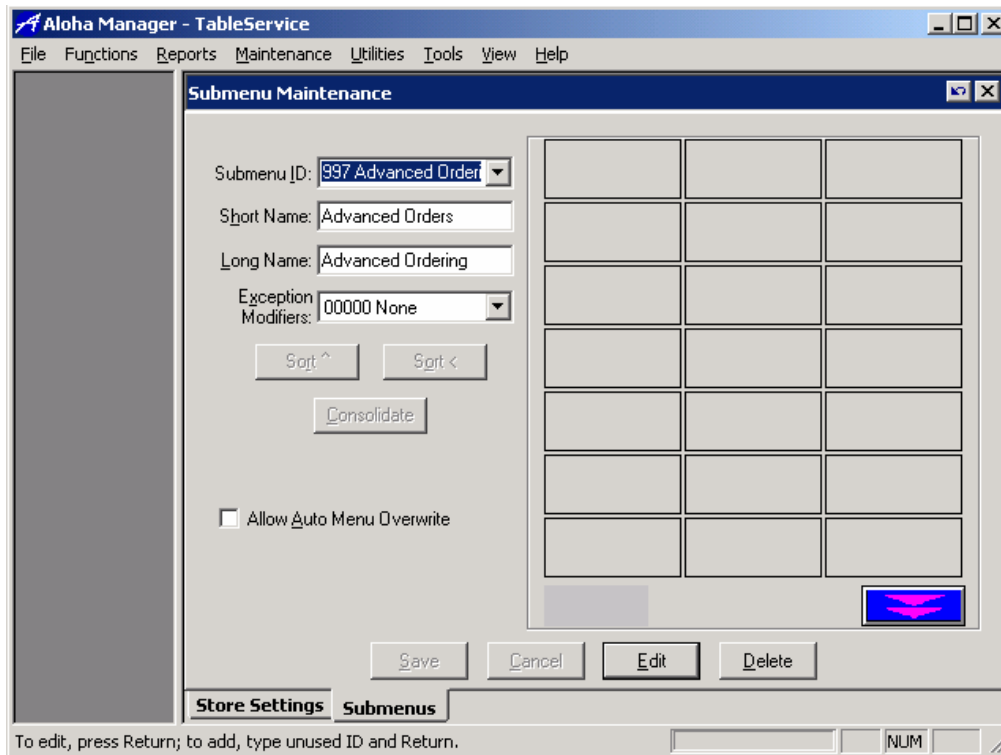


In the COM Interfaces inset, click on the “Use FOH COM Interface?” checkbox.

In the first open line of External Activity Interceptors, enter: ADVFOH.ADV

2.4.2 Setup Advanced Ordering Submenu

Create Submenu 997 for Advanced Ordering as shown below:



Do not setup any buttons on the submenu at this time. This will be done using the TSButton.cfg file.

Include the Submenu on all appropriate menus, for example Hostess Menu, Server Menu, Bar Tender Menu, etc.

2.4.3 Setup the TSButton.cfg file.

You need to perform this step ONLY IF you did NOT use submenu 997 in the previous step, or if Aloha is not installed on the C: drive on the FOH TERMINALS.

If you cannot use submenu ID 997, then the TSButton.cfg file (see AKBID1185) must be modified to use the desired submenu number.

An example TSButton.cfg file is provided that uses sub menu ID 997.

A sample TSButton.cfg file looks like this: .

```
1,997,1,ADVANCED\nORDERING,C:\ALOHA\AdvOrder\AdvOrderLauncher.exe,1
1,997,2,STORE\nORDER,C:\ALOHA\AdvOrder\AdvOrderLauncher.exe /STORE,1
1,997,3,SHOW\nORDERS,C:\ALOHA\AdvOrder\AdvOrderLauncher.exe /SHOW,1
```

If you cannot use submenu 997, then change the 997 value in the TSButton.cfg file to the desired value, and save the file in the DATA and NEWDATA directories.

If Aloha is not installed on the "C" drive on your FOH terminals, you will need to change the drive parameter in TSButton.CFG. For example, if Aloha is installed on the E: drive, change the line in TSButton.CFG to be:

```
1,997,1,ADVANCED\nORDERING,E:\ALPHA\AdvOrder\AdvOrderLauncher.exe,1
```

2.4.4 Configuring Aloha Values for Use by Advance Ordering System

The Advance Order requires several elements be configured in Aloha Manager as described below.

2.4.4.1 Aloha Items

The following Aloha Items should be setup in Aloha Manager. From the Maintenance Menu, select Menu, then Items. The following Aloha Items should be created:

- **Order Contact** – This Aloha Item is used to record customer information on the order. The following fields in the item should be initialized:
 - **Item ID** - Use 9999 if available, otherwise as desired
 - **Short Name** – Order Contact
 - **Ask for Description** (Miscellaneous Tab) must be checked

- **Prepay Revenue** – This Aloha Revenue Item is used when a deposit is being recorded for the Order. The following fields in the item should be initialized:
 - **Item ID** – Use 9998 if available, otherwise as desired
 - **Short Name** – Prepaid Sales or as desired
 - **Revenue Item** (Miscellaneous Tab) must be checked

2.4.4.2 Aloha Tenders

The following Aloha Tender should be setup using Aloha Manager. From the Maintenance Menu, select Payments, then Tenders. The following Tender should be created:

- **Prepay** – This Aloha Tender is used when an order is reloaded into Aloha to record the amount previously tendered for the order. The following fields in the tender should be initialized:
 - **Tender ID** – Use 99 if available, otherwise as desired
 - **Name** - Prepaid
 - **Active** – Must be checked
 - **Track** – Must be checked

2.4.4.3 Employee ID – Voiding Orders

The following Employee should be setup using Aloha Manager.

- **Employee ID for Voiding Orders** – The Advanced Ordering System may void items when storing the order outside of Aloha for a future date when the items on the check have already been ordered by accident. Select or create an Employee which has an Access Level authorized to Void Items.

2.4.4.4 Void Reason – Voiding items which were accidentally ordered.

The following Void Reason should be setup using Aloha Manager. From the Maintenance Menu, select System, then Void Reasons.

- **Void Reason** – This Void Reason is recorded when the Advanced Order system needs to void an item which has been accidentally ordered when creating the order.
 - **Void Reason ID** – Select as desired
 - **Description** – Advance Order
 - **Return Voided Items to Inventory** - Check

2.4.5 Setup the Aloha Interface Server

The Automatic Order Loading is not enabled by Default. If this facility is not being used, this step can be skipped.

If the Automatic Order Loading Facility is to be used, you must setup an Aloha Interface Server.

IMPORTANT: The setup of an Aloha Interface Server is exactly the same as the setup for an Aloha Order Entry Terminal. However, because the Interface Server Terminal does NOT have a GUI, confirmation that the terminal is correctly setup is not straightforward!

THEREFORE, IT IS HIGHLY RECOMMENDED that the installer first create an Aloha Order Entry Terminal, then convert it to a Aloha Interface Server Terminal.

- Disable an existing terminal (uncheck it's terminal type) so as to not affect the NUMTERMS setting.
- Create a new terminal, and verify that it will start correctly as an Order Entry Terminal.

2.4.5.1 IBERCFG.BAT File Setup

The Advanced Ordering Back of House Installation program copies an initial version of the IBERCFG.BAT file to the IBERDIR directory (such as D:\ALOHA) on the Back of House machine.

IMPORTANT: As the interface server terminal MUST start at windows startup just as any other Aloha Terminal, an IBERCFG.BAT file is automatically inserted into the Iberdir.

You must edit this file to insure that the following values are correct for your system:

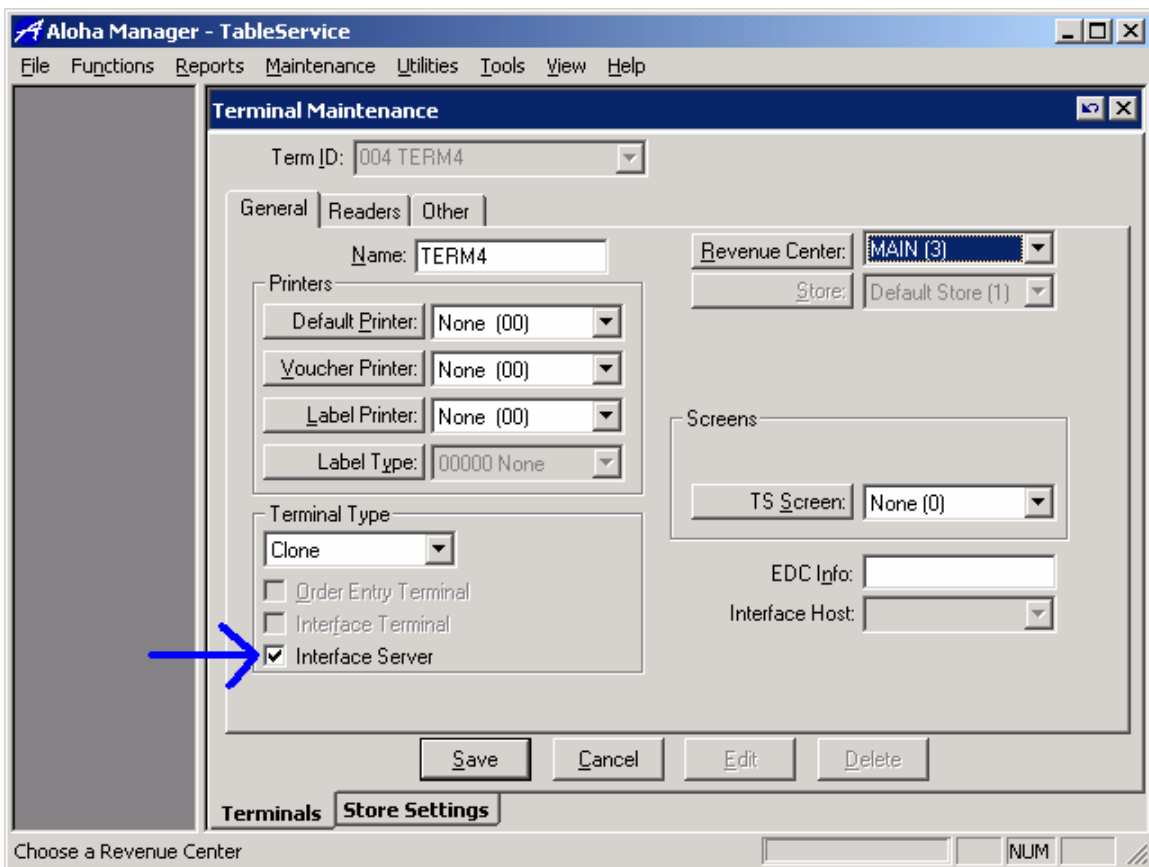
```
SET IBERROOT=Aloha – This must match your system setting
SET LOCALDIR=C:\Aloha – This must match your system setting
SET EDCPATH=\\ALOHABOH\BOOTDRV\Aloha\EDC
SET TERMSTR=TERM – This must match your system setting
SET TERM=2 - This must be the number of the INTERFACE
SERVER
SET NUMTERMS=2 (This is the number of ORDER ENTRY
TERMINALS – Do not include the Interface Server in this count.)
SET SERVER=ALOHABOH – This must match your system setting
SET MASTERCAPABLE=FALSE (must be false)
SET SERVERCAPABLE=FALSE (must be false)
SET AUTOEXIT=TRUE
SET DOUBLECLICK=TRUE
DELETE C:\ALOHA\TMP\EXITING (prevents continuous terminal
rebooting)
```

START C:\Aloha\BIN\IBER.EXE

NOTE: You must verify that this terminal starts correctly after Aloha Refresh and EOD operations!

After verifying that the new terminal starts correctly, change its Terminal Type to **INTERFACE SERVER** as shown below. **NOTE:** You may need to click/unclick the current terminal type setting to enable selection of all available terminal types.

If you disabled a terminal by un-checking its terminal type, be sure to restore it now.



2.4.6 Refresh

Be sure to refresh Aloha after making changes. Note: It may be necessary to refresh Aloha twice to effect the changes!

2.5 Advanced Ordering Configuration

To start the Advanced Ordering Configuration program, on the Aloha BOH Machine, go to START->PROGRAMS->LONE TREE TECHNOLOGY->ADVANCED ORDERING CONFIG.

2.5.1 Configuring Aloha Values

The Aloha Values Tab is shown below.

The following values must be setup in Aloha as well as in the Advanced Ordering Configuration, as described in the previous section:

- **Order Contact Item ID** – This Aloha Item is used to record customer information on the order.
- **Prepay Revenue Item ID** – This Aloha Revenue Item is used when a deposit is being recorded for the Order.
- **Prepay Tender ID** – This Aloha Tender is used when an order is reloaded into Aloha to record the amount previously tendered for the order.
- **Manager ID for Voiding Orders** – The Advanced Ordering System may void items when storing the order outside of Aloha for a future date when the items on the check have already been ordered. The system may need a manager ID to perform the Void. Select a Employee ID which is authorized to perform Manager Voids.
- **Void Reason ID** – This Void Reason ID is recorded when the Advanced Order system needs to void an item.
- **Order Load Employee ID** – The employee ID to use to place orders in Aloha via the Auto Order Load facility.
- **Order Load Job Code ID** – The job code ID of the employee ID that the Auto Order Load facility uses to load orders.
- **Order Load Terminal ID** – The Terminal ID of the Aloha Interface Server Terminal running with the Auto Order Load facility.

- **Order Load Queue ID (QS)** – The Aloha Queue ID to use with Advance Orders by the Auto Order Load facility. Required for Quick Service, not used in Table Service.

ADVANCED ORDERING SYSTEM CONFIGURATION

Aloha Values | User Defined | Order Ready Times | Deposits | Order Loading

Order Contact Item ID: 9999

Prepay Revenue Item ID: 9998

Prepay Tender ID: 99

Manager ID for Voiding Orders: 100

Void Reason ID: 10

Order Load Employee ID: 350

Order Load Employee Job Code ID: 20

Order Load Terminal ID: 4

Order Load Queue ID (QS): 0

SAVE

Version 1.0.6

2.5.2 Configuring User Defined Fields

The User Defined Fields Tab is shown below. The user may specify up to 4 fields for user input. Use this tab to specify the prompt for each field.

Note the following fields are already pre-defined for use (also see picture below):

- Phone (**required**)
- Name (**required**)
- Company
- Address1
- Address2
- City, State, ZIP/Postal Code
- Alternate Phone
- Fax
- Customer Note

ENTER REQUIRED FIELDS

SET ORDER DATE	SET ORDER READY TIME
Phone: 4065551212	Alt. Phone:
Name: 	Fax:
Company:	Cust. Note:
Address:	
Address:	
City:	
State: ZIP:	

Q	W	E	R	T	Y	U	I	O	P	7	8	9
A	S	D	F	G	H	J	K	L	;	4	5	6
Z	X	C	V	B	N	M	,	.	?	1	2	3
Caps UNlock		Space						BackSpace		BS	0	CL

Customer Information Screen with standard fields – 4 user defined fields available.

If a field is required for entry by the user, check the Required Entry Flag.

ADVANCED ORDERING SYSTEM CONFIGURATION

Field 1 Desc:	<input type="text"/>	<input type="checkbox"/>	Required Entry
Field 2 Desc:	<input type="text"/>	<input type="checkbox"/>	Required Entry
Field 3 Desc:	<input type="text"/>	<input type="checkbox"/>	Required Entry
Field 4 Desc:	<input type="text"/>	<input type="checkbox"/>	Required Entry

Version 1.0.6

2.5.3 Configuring Order Ready Times

The Order Ready Times Tab is shown below. Use these fields to specify the earliest and latest times that orders can be made available to the patron for each day.

- **Min Order Ready / Max Order Ready** – Specify the Earliest / Latest Times that the order will be ready.
- **Time Increment** – The Time Increment Field allows you to configure the gap between order ready times.

The screenshot shows a software configuration window titled "ADVANCED ORDERING SYSTEM CONFIGURATION". It has five tabs: "Aloha Values", "User Defined", "Order Ready Times" (which is selected), "Deposits", and "Order Loading". In the "Order Ready Times" tab, there are three input fields: "Min Order Ready" with a dropdown menu showing "09:00 AM", "Max Order Ready" with a dropdown menu showing "05:00 PM", and "Time Increment" with a text box containing "15". At the bottom center of the window is a "SAVE" button, and at the bottom right is the text "Version 1.0.6".

2.5.4 Configuring Deposits

The Deposits Tab is shown below. Use these fields to configure the desired deposit options:

- **Require Deposit** – If checked, when the order is saved, the user is required to specify a deposit amount.
- **Ask for Deposit** – If checked, the user will be asked for a deposit, even if a deposit is not required.
- **Use Percentage** – If checked, a percentage deposit option will be presented.
- **Percentage** – Enter a value from 0 to 100 which represents the percentage deposit required for the check total.
- **For Balances Greater Than (Percentage Deposit)** – Specify the minimum check amount that requires a deposit.
- **Use Fixed** – If checked, a fixed deposit option will be presented.
- **Deposit Amount** – Enter the fixed deposit amount.

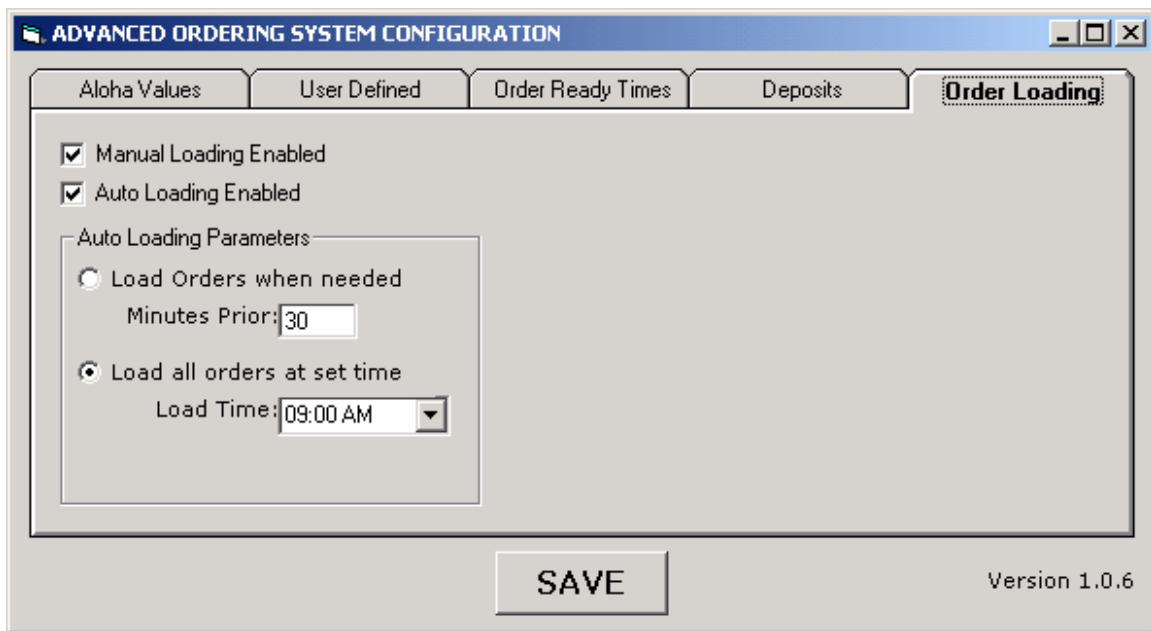
- **For Balances Greater Than (Fixed Deposit)** – Specify the minimum check amount that requires a deposit.
- **Allow Manual Deposit Entry** – If checked, allows the user to specify any deposit amount
- **Must meet Deposit Rules** – If checked, enforces all minimum deposit requirements (as specified by percentage or fixed deposits).

2.5.5 Configuring Order Loading

The Order Loading Tab is shown below. Use these fields to configure the desired Order Loading options:

- **Manual Loading Enabled** – If checked, Advanced Orders may be loaded into Aloha from the Front of House. When enabled, the LOAD button will be enabled on the Order Detail Display for Orders that have not already been loaded and are scheduled for the current date of business.
 - **Note:** This feature allows the user to selectively load orders into Aloha when needed.
- **Auto Loading Enabled** – If checked, activates the Advanced Ordering Auto Loader system which runs on the Aloha Back of House machine. If this feature is used, Aloha must be configured to run an Aloha Interface Server terminal on the Back of House.

- **Note:** If Manual Loading is enabled, orders which are loaded manually WILL NOT be reloaded by the Auto Loader.
- **Load Orders when needed** – If selected, orders are loaded into Aloha based on the Order Due Time and the “Minutes Prior” value.
- **Minutes Prior** – Indicates how many minutes prior to the Order Due Time that the order should be loaded into Aloha.
- **Load all orders at set time** – If selected, all orders are loaded into Aloha at the time specified by the “Load Time” value.
- **Load Time** – Indicates when all orders should be loaded into Aloha.



2.5.6 Printer Fonts

The Advanced Ordering System uses the Aloha System to print Front of House Documents. All Advanced Ordering System documents use a 40 character line width. If you are experiencing line wrap issues with printers on your site, you can adjust the printer font by manually editing the ADVORDER.INI file in the ADVORDER directory on the Aloha BOH Machine.

In the file ADVORDER.INI, locate the line:

PRINTCPI = 1

The values may be:

- 1– Medium (factory setting)
- 2 – Small
- 0 – Large (not recommended)

2.5.7 Save Changes

Click on the **SAVE** button after completing your changes.

3 Installation File Locations

The following information is provided as a reference so that the installer can verify that files were correctly installed. No action is necessary by the installer.

3.1 Front of House Files

The Advanced Ordering Front of House installation program uses the Aloha LOCALDIR environment variable to determine where to place installation files. The installation program creates a sub-directory of Localdir called ADVORDER. A typical directory name would be C:\Aloha\Advorder.

The following files are placed in the AdvOrder directory:

- AdvOrder.exe
- AdvOrder.DLL
- AdvOrderLauncher.exe
- AlohaXMLOrderBridge.exe
- Mscal.ocx

3.2 Back of House Files

The Advanced Ordering Back of House installation program uses the Aloha IBERDIR environment variable to determine where to place installation files. The installation program creates a sub-directory of Iberdir called ADVORDER. A typical directory name would be D:\Aloha\Advorder.

The following files are placed in the AdvOrder directory:

- AdvBoh.exe
- AdvConfig.exe
- AlohaXMLOrderBridge.exe
- Install.exe

- LTTADVORDR.INI
- XMLORDER.INI
- ADVORDER.MDB

The installation program also places the TSBUTTON.CFG file in the DATA and NEWDATA directories.

4 Log File Generation

This information is provided for Installer / Technician support reference only.

4.1 Front of House Log files

The Advanced Ordering System Front of House system creates a log file called ADVODRx.LOG (x is the terminal ID number) in the Aloha TMP directory. This file can be helpful for debugging purposes.

At Aloha FOH startup, the AdvFoh.dll, which is directly linked to Aloha, writes a line to the Debout.xx file (xx is the terminal ID Number) which indicates that the DLL has started and lists it's version number.

4.2 Back of House Log files

The Advanced Ordering System Auto Loader program creates a Log file called ADVBOH.LOG in the Aloha TMP directory on the Back of House system. This file should be deleted periodically as needed to conserve disk space.

5 Usage of Dated Subdirectories and Backup

The Advanced Ordering System creates dated subdirectories for future dates as needed to store orders for those dates.

Customer information is also stored in a Microsoft Access Database, ADVORDER.MDB, which is stored in the ADVORDER subdirectory on the Aloha Back of House machine. It is recommended that this file be backed up on a regular basis.