NCR VOYIX

Aloha Digital Ordering Implementation Guide

Last Updated: April 15, 2025

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Revision Record

Date	Version #	Description
06/11/2020		Converted document to use new template.
08/18/2021		Added Members, Custom Roles, and Audit Log functions. Removed Studio Preview function.
10/07/2021		Added Custom Roles, Stores, and Admins functions.
02/01/2022		Added Company Settings function. Removed Viewing the Dashboard section.
02/21/2022		Add the following options to the Site Settings > Sites function: • Allow Tipping which overrides the 'Allow Tipping' option in Studio > Settings function. • Pay with Gift Card. • Use Item Level Special Instructions which overrides the 'Use Item Level Special Instructions' option in Company Settings.
03/08/2022		Added the following features: • Configuring deep linking. • Configuring single site flow. • Configuring upselling.
08/03/2022		Removed the following options from the Company Setup function because they are either not optional or are not designed for Digital Ordering: • FaceBook Pixel ID • Terms of Use URL • Privacy Policy URL • Nutritional Information URL • Block Website Redirect URL • Enable GDPR
		Added a Dine-in_Landing.png image in the Studio > Images function for the Contactless Dine-in feature.
03/15/2023		Replaced the 'Accepting Orders' option in the Site Settings > Sites function with the 'Emergency Closed' option.
04/28/2023		Updated product name to Aloha Digital Ordering.

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Date	Version #	Description
7/11/2023	v21.1.1	Per the Digital Ordering v21.1.1 release, we enhanced the following: • Added 'Displayed Closing Times' so you can display an earlier closing time on the online ordering website while still accepting online orders past the time. This allows the site to designate hours to leave the kitchen open for online orders and not give the impression the consumer can walk into the location to order after the displayed closing time. • Removed the 'Address Required' option in Company Settings is as it is not utilized in Digital Ordering. • Moved order mode options found in Studio > Settings to the 'Store Locator Settings' section of the Company Settings function.
08/04/2023		Added instructions for configuring a marker item for online orders.
10/09/2023	v23.1.2	Per the Digital Ordering v23.1.2 release, we enhanced the following: • Added 'Display Pickup' to control the visibility of the Pick Up order mode. • Added the ability to add more than one email address to 'Account Management Email Address.'
06/06/2024	v24.1.3	Per the Digital Ordering v24.1.3 release, we removed the Studio > Settings function and all applicable settings are migrated to the Company Settings and Site Settings functions.
07/26/2024		Updated document to reflect NCR Voyix branding.

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About Aloha Digital Ordering

NCR Voyix offers end-to-end restaurant management solutions that fully integrate with the Aloha® Point-of-Sale (POS) system, simplifying restaurant operations and touchpoints. Aloha Digital Ordering (DO), hereafter referred to as Digital Ordering or DO, is the NCR Voyix Hospitality eCommerce platform that provides a fully integrated ordering platform for consumers to order from on any device, from anywhere. Digital Ordering is simple to brand and manage, so you can focus on your business. It is delivered through a Software as a Service (SaaS) model, which manages system enhancements remotely to minimize disruption to your business while providing new functionality. NCR Voyix helps restaurants take a digital-first approach to running their businesses to help maximize every customer interaction, reduce operational costs, and compete with industry disruptors.

Digital Ordering includes:

- Responsive web that gives consumers the ability to interact and easily order from any device, at any time, and from anywhere.
- Contactless transactions for takeaway, delivery, and dine-in that enable your brand to increase orders taken, while reducing your need for Front-of-House (FOH) labor.
- Point-of-sale (POS) injection that seamlessly routes orders to your terminals and make managing your online orders a simple addition to your operations.

Is this guide for you?

The purpose of this guide is to provide guidance on implementing Digital Ordering within the Digital Ordering portal. You must still configure the required options in Web Admin, such as store hours, order types, and others, and build your menu in Menu Configurator. In the long-term, the Digital Ordering portal will replace these products as parity continues. After completing the tasks in Web Admin and Menu Configurator, use the Digital Ordering Implementation Guide to further configure your website for Digital Ordering.

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Accessing the Digital Ordering portal

We discuss the following topics for accessing the Digital Ordering portal:

- Enabling the Digital Ordering user interface.
- Logging in to the Digital Ordering portal.
- Retrieving a forgotten password.
- Changing your password.

Enabling the Digital Ordering user interface

To enable the Digital Ordering user interface and access the Digital Ordering portal, you must add the 'UseEngageWeb' and 'EngageAppId' company settings in Web Admin. This also allows the portal to respect any configuration done in Web Admin and Menu Configurator for Digital Ordering.

To enable the Digital Ordering user inteface:

1. In Web Admin, select **Configuration > Company Settings Setup**.
2. Select a **set** from the 'Choose Settings Set' drop-down list.
3. Click **Add Setting**.

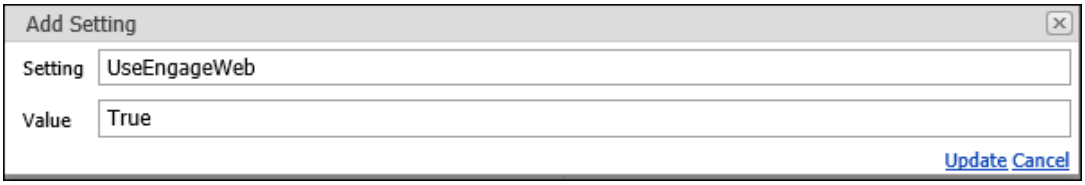

Figure 1 UseEngageWeb Company Setting

4. Type **UseEngageWeb** in 'Setting' to enable access to the Digital Ordering user interface.
5. Type **True** in 'Value.'
6. Click **Update**.
7. Click **Add Setting**.

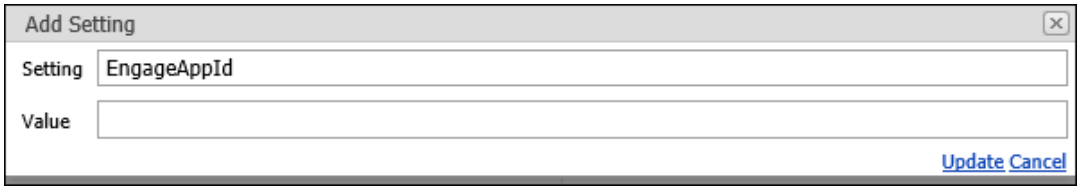

Figure 2 EngageAppId Company Setting

8. Type **EngageAppId** in 'Setting.'
9. Verify **Engage App Id** in 'Value.' This value is unique to your online ordering company and the organization to which it is linked. The organization is the company or concept you use to log into

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the Digital Ordering portal. The first part of the value is the name of the organization with no dashes, followed by an underscore, and then a unique alphanumeric value. If this is not already populated in the Configuration > Company Settings function, contact your NCR Voyix representative or NCR Voyix support for assistance.

10. Click **Update**.
11. Exit the **Company Settings Setup** function.

Logging in to the Digital Ordering portal

You log in to the Digital Ordering portal with your username, password, and organization provided to you by an NCR Voyix representative. If you do not have these credentials, contact your NCR Voyix representative or NCR Voyix support.

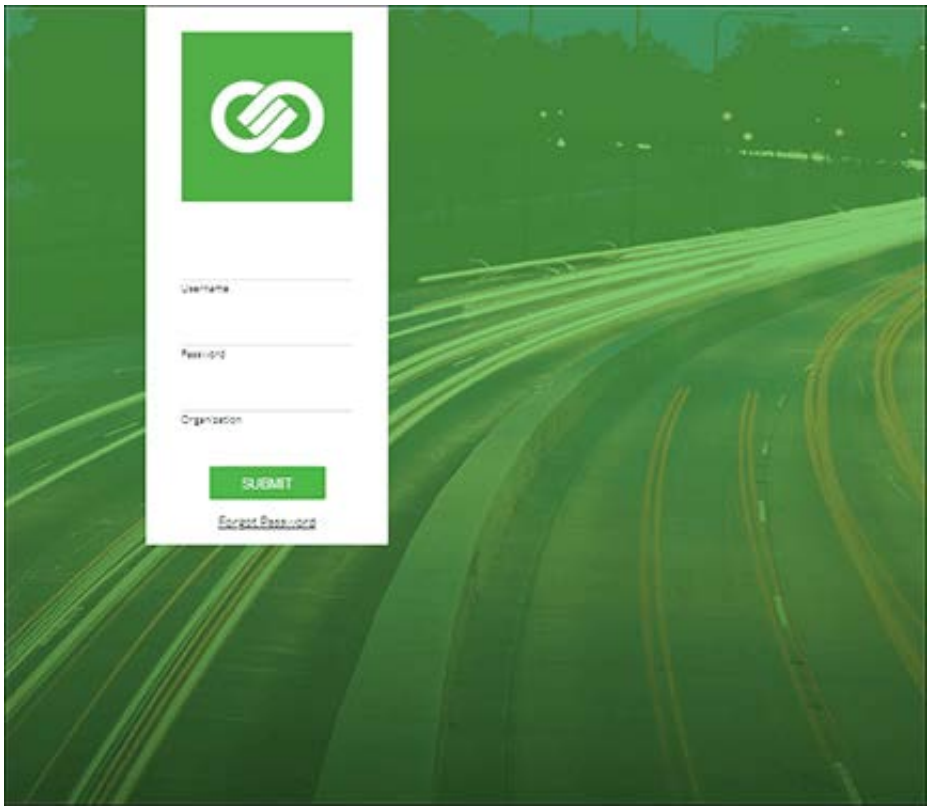

Figure 3 Digital Ordering Sign-In Screen

To log in to the Digital Ordering portal:

1. Open a **browser** and type **https://digitalorderingdashboard.ncrsaas.com/login** as the URL, and press **Enter**.
2. Enter your **username**, **password**, and **organization**.
3. Click **SUBMIT**. The Orders function appears with access to the navigation pane on the left side of the screen.

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Retrieving a forgotten password

If you forgot your password, you can click Forgot Password to receive an email with a temporary password.

To retrieve a forgotten password;

1. Click **Forgot Password** on the Digital Ordering Sign-in screen. The Forgot Password screen appears.

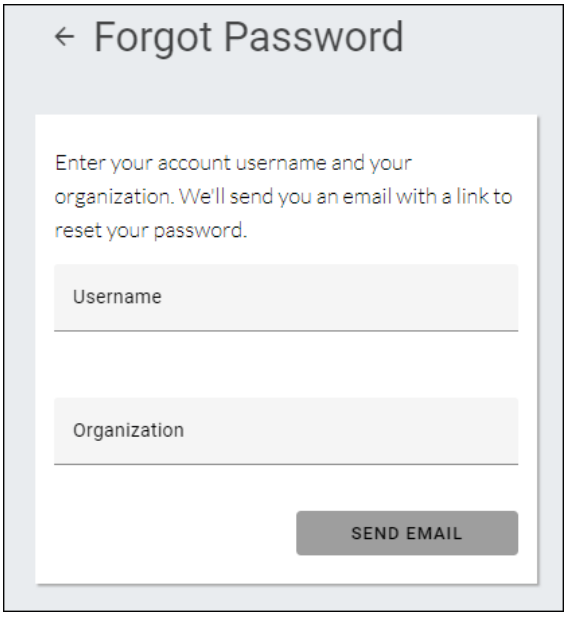

Figure 4 Forgot Password Screen

2. Enter your **username** and **organization**, and click **SEND EMAIL**. An email is sent to the address for the account.

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Changing your password

You can change your password to the Digital Ordering portal at any time.

To change your password:

1. From within the Digital Ordering portal, click the **icon** located at the top right of the screen and select **Change password**.

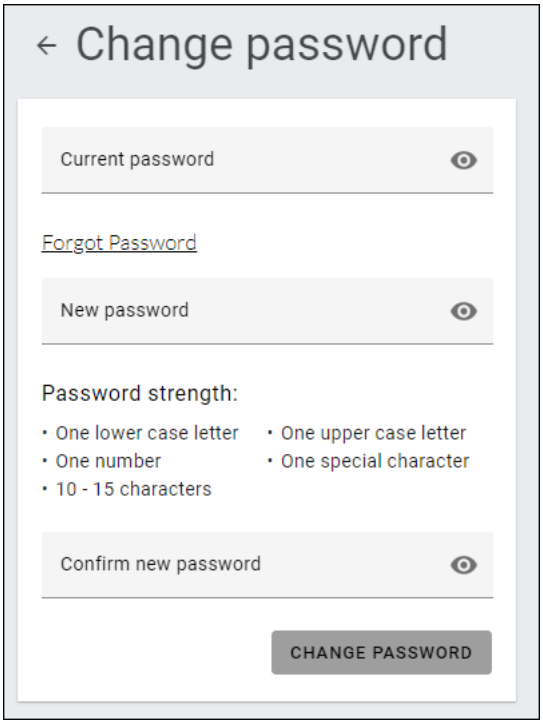

Figure 5 Change Password Screen

2. Type your **current password**.
3. Type your **new password** in both 'New password' and 'Confirm new password.'
4. Click **CHANGE PASSWORD**.

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Configuring Digital Ordering

This section discusses the following functions for implementing Digital Ordering:

- Configuring Company Settings.
- Configuring Sites.
- Configuring site colors.
- Configuring site strings.
- Configuring images for site elements.
- Configuring images for site elements.
- Configuring site fonts.
- Configuring site email template.
- Configuring site text and previewing the user experience.
- Configuring a marker item for online orders.
- Configuring deep linking.
- Configuring single site flow.
- Configuring upselling.

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Configuring Company Settings

The Company Settings function allows you to define global values for the entire company, such as the company name, culture, currency, and more; however, the Site Settings function provides a means for overriding some global values with a site specific value. See "Configuring Sites" on page 31.

1. Log in to the **Digital Ordering portal**.

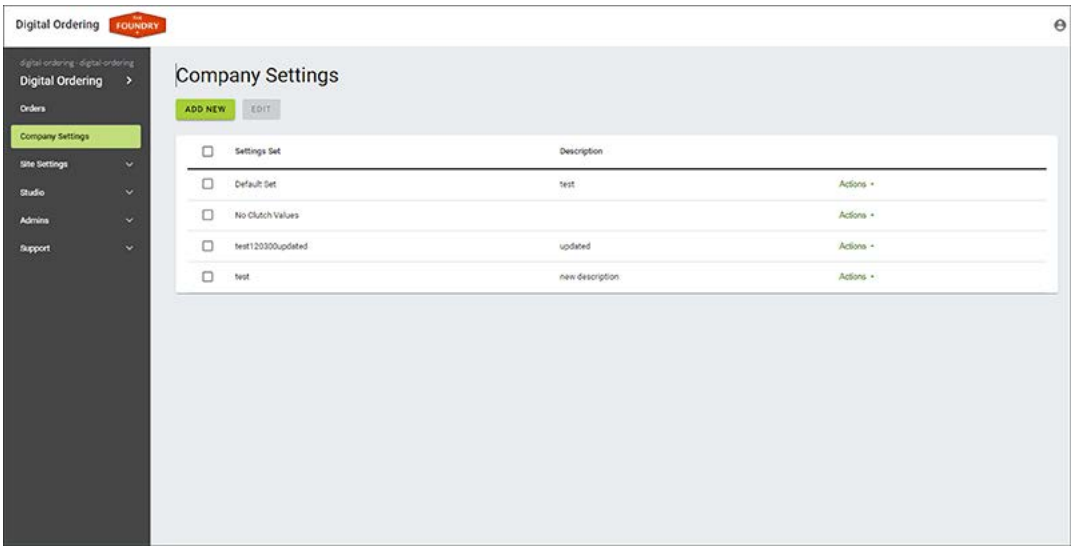

Figure 6 Company Settings Function

2. Select **Company Settings** in the navigation pane to open the Company Settings function. A list of existing company setting sets appears.

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3. Select an **existing company setting set** and click **EDIT** or click **ADD NEW** to create a new set. The following screen appears with COMPANY SETUP as the active tab.

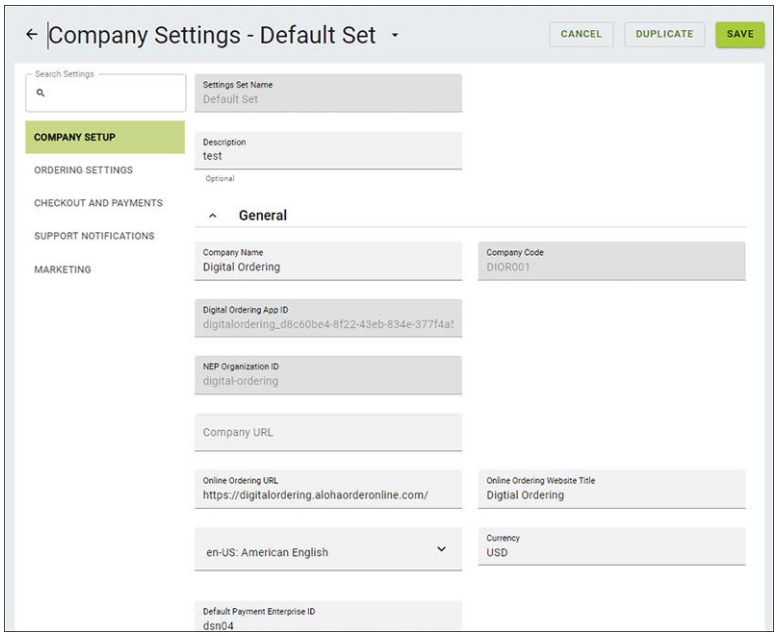

Figure 7 Company Setup - Company Setup Tab

4. Type or verify the **Settings Set Name**.
5. Optionally, type a **description** for the Company Settings set. Use this option to distinguish between multiple sets, such as 'Uses Gift Cards,' to denote this set is configured for sites that use gift cards.
6. Use the **definitions** on the following pages to set values for the options that appear on each tab.

   "COMPANY SETUP tab" on page 9.

   "ORDERING SETTINGS tab" on page 16.

   "CHECKOUT AND PAYMENTS tab" on page 23.

   "SUPPORT NOTIFICATIONS tab" on page 27.

   "MARKETING tab" on page 28.
7. As a precaution, click **SAVE** between each tab before moving to the next tab.

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COMPANY SETUP tab

Use the COMPANY SETUP tab to configure options related to the following sections:

- General
- Consumer Account Settings
- Loyalty and Gift Card
- Advanced

Section: General

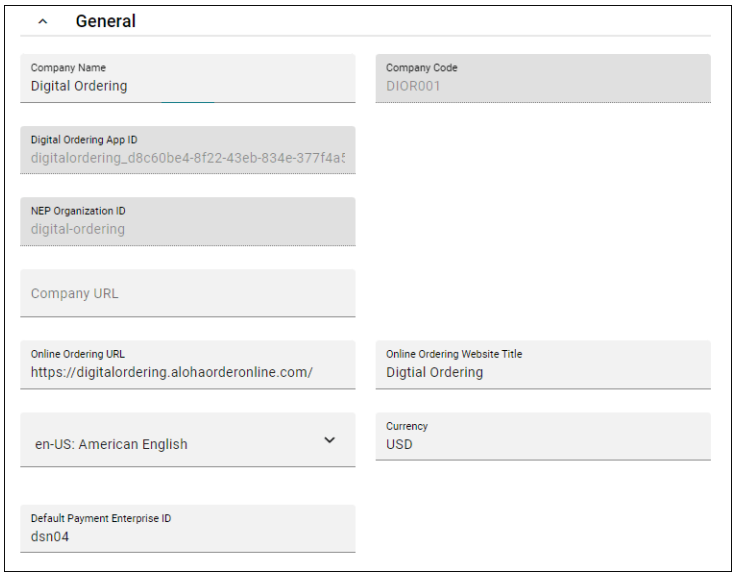

Figure 8 Company Settings - Company Setup - General Section

Company Name — Specifies the company name using the Digital Ordering Web. This normally matches the same name of the company in Web Admin, but not required.

Company Code — Specifies the unique company code and must match the code listed in Web Admin. This should already be filled in. If it is not filled in, add the online ordering company code. If you are unsure of the code, contact your NCR Voyix representative or NCR Voyix support team. If the company code is not present, an error appears when you open the Digital Ordering portal.

Figure 9 Missing Aloha Online Ordering Company Code Message

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Digital Ordering App ID — Verify a unique ID appears in 'Digital Ordering App ID.' The ID is created when the Implementation team runs the wizard for Aloha Online Ordering.

NEP Organization ID — Specifies the name of the NEP organization used for sending information to above-store applications, such as BSL. This is the same Organizational name that was provided to log in to the portal. The ID is assumed and is identical to the 'NEP organization Id' in Web Admin.

Company URL — Identifies the company URL. The URL is the same 'CompanyURL' used in Web Admin > Company Settings Setup.

Online Ordering URL — Identifies the same online ordering URL used in Web Admin. The URL is embedded into the Home button on the Digital Ordering landing page and used for the Signup URL. When you look at Studio Preview or Live Editor and select 'App view of Engage Ordering.' This defines the link in the middle of the page that takes the consumer to the ordering page to search for a location. The link needs to link directly to the ordering page, such as https://CompanyPrefix.alohaorderingonline.com/.

Online Ordering Website Title — Identifies the same website title used in Web Admin.

Culture — Identifies the local language used by the company. Digital Ordering currently supports en-US: American English only.

Currency — Identifies the currency used by the company, such as 'USD.'

Default Payment Enterprise ID — Specifies the ID defined for the site tree in Command Center for the applicable company. Consumer Profile Services uses this ID for storing credit card information in an encrypted database.

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Section: Consumer Account Settings

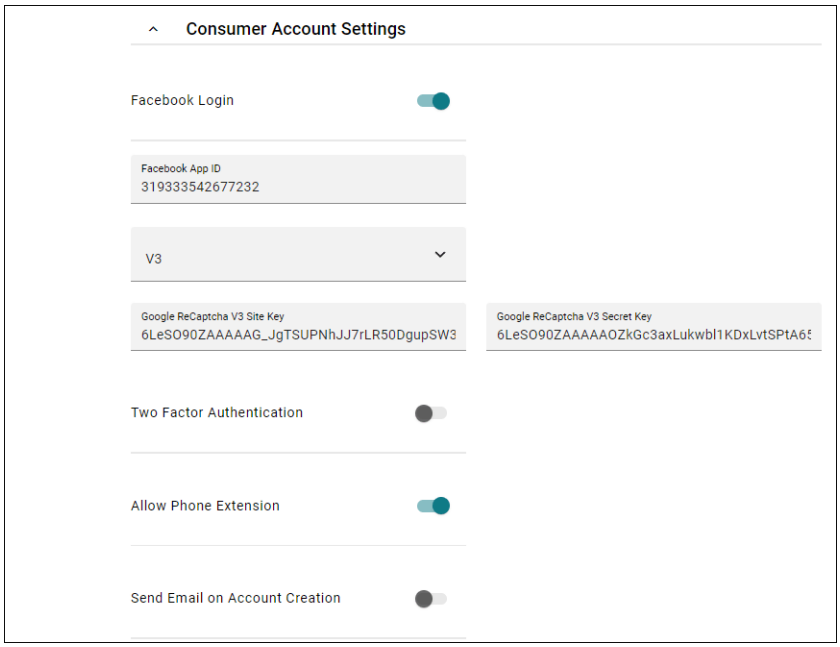

Figure 10 Company Settings - Company Setup - Consumer Account Settings Section

Facebook Login — Allows consumers to log in to the website with their Facebook credentials. When disabled, consumers cannot use their Facebook credentials.

Facebook App ID — Identifies the ID obtained from a Google developer, to allow consumers to log in to the website with their Facebook credentials. If you want to use this feature and have someone that manages a Facebook account for your location, we suggest you have them create your Facebook App ID. You need to have a Facebook developer login registration to do this.

To enable a consumer to use their existing Facebook account to initiate sign-up for Engage Web:

1. Log in to **Facebook**.
2. Visit the **Facebook developer account** at https://developers.facebook.com/.
3. In the top right corner under the 'May Apps' tab, click **one** of the apps.
4. In the top left corner, click the **App** drop-down list to see more apps.
5. Verify if the company already has a **Facebook app**.
6. In the left side, select **Settings tab > Basic**.
7. Type the **customer's URL** in 'App Domains.'
8. Type the **URL** for the customer's privacy policy in 'Privacy Policy URL.'
9. Find and copy the **policy** on the customer's website.

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10. Log in to Web Admin and copy the **URL** in Order Management tab > Start Order > Privacy Policy Link at the bottom of the page.
11. Select **Business and Pages** as the category.
12. At the bottom of the page, select **Add Platform** and add the customer's **website URL**.
13. In the left side, select **Settings tab > Advanced**.
14. Select **ON** in 'Allow API Access to App Settings.'
15. Select **Facebook Login tab > Settings**. If there is no Facebook Login tab, click + next to the products and add the Facebook login product).
16. Select **ON** in 'Enforce HTTPS.'
17. Type the **website base URL** and the **loyalty URL** provided by the customer in 'Valid OAuth Redirect URLs.' such as <name of the restaurant>.com/loyalty. For Digital Ordering, add the DomainPrefix.AlohaOrderOnline.com/engage.aspx.
18. In the left side, copy the **Facebook App ID** and paste in 'Facebook App Id.'

Google reCaptcha Version — Specifies the reCaptcha version number to use for additional security when a consumer signs up in the Digital Ordering website. reCAPTCHA is a free service from Google that helps protect websites from spam and user account hacking by offering a set of image recognition tests to verify the user is human and not a robot (or bot). Once the service verifies the user is not a robot logging in to the Digital Ordering website, reCAPTCHA allows access.

Google reCaptcha V2 Site Key — Specifies the site key to use for the reCaptcha v2 button when a consumer logs in and a guest checks out. This is a preventative security measure to ensure 'bots' are not placing orders into the system. Do not change this option. NCR Voyix controls this while the site is embedded on *.alohaonlineordering.com. To create your own domain name specific reCaptcha v3 keys, make sure you are specific with the domain and include the domain prefix when you register. ***Required Options:*** You must select V2 from the 'Google reCaptcha version' drop-down list to enable this option.

Google reCaptcha V3 Site Key — Specifies the site key to use for the reCaptcha v3 button when a consumer logs in and a guest checks out. This is a preventative security measure to ensure 'bots' are not placing orders into the system. Do not change this option. NCR Voyix controls this while the site is embedded on *.alohaonlineordering.com. To create your own domain name specific reCaptcha v3 keys, make sure you are specific with the domain and include the domain prefix when you register. ***Required Options:*** You must select V3 from the 'Google reCaptcha version' drop-down list to enable this option.

Google reCaptcha V2 Secret Key — Specifies the secret key to use for the reCaptcha v2 button to allow for the security protection of reCaptcha without the consumer having to interact with the login screen. To enable this feature, create your own domain name specific reCaptcha v2 keys. Make sure you are specific with the domain and include the domain prefix when you register. For additional information, refer to https://developers.google.com/recaptcha/docs/v2. ***Required Options:*** You must select V2 from the 'Google reCaptcha version' drop-down list to enable this option.

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Google reCaptcha V3 Secret Key — Specifies the secret key to use for the reCaptcha v3 button to allow for the security protection of reCaptcha without the consumer having to interact with the login screen. To enable this feature, create your own domain name specific reCaptcha v3 keys. Make sure you are specific with the domain and include the domain prefix when you register. For additional information, refer to https://developers.google.com/recaptcha/docs/v3. ***Required Options:*** You must select V3 from the 'Google reCaptcha version' drop-down list to enable this option.

Two-Factor Authentication — Adds extra protection when a consumer logs in to the Digital Ordering website. A code is sent inside an email to the consumer for the consumer to enter. You need to complete the Email Template "Reply To" field for this feature to work. See the Email Templates section later in this document. When disabled, a code is not included in the email.

Allow Phone Extension — Allows the company to accept a valid extension code in addition to the standard phone number. When disabled, extensions are not allowed.

Send Email on Account Creation — Sends an email to consumers when they create an account. When disabled, an email is not sent.

Section: Loyalty And Gift Card

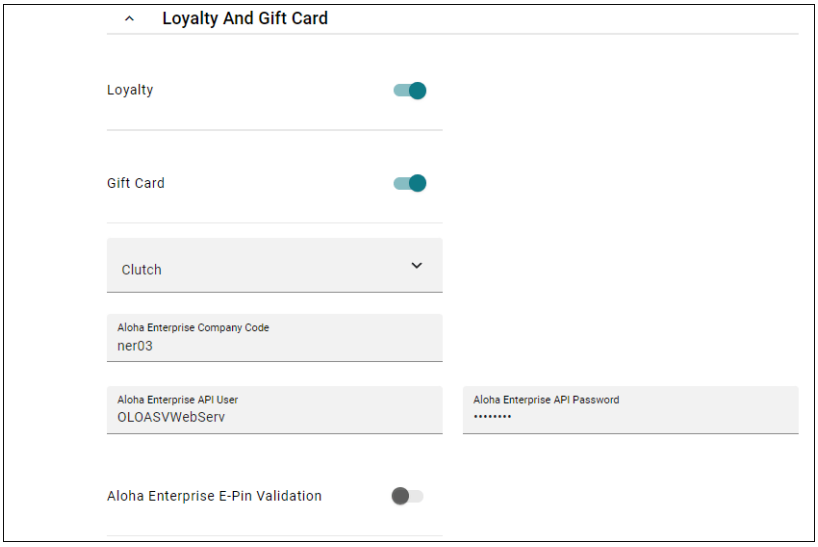

Figure 11 Company Settings - Company Setup - Loyalty And Gift Card Section

Loyalty — Allows the company to support loyalty. When enabled, the 'Loyalty Processor' drop-down list appears. When disabled, the company does not accept loyalty and gift cards.

Gift Card — Allows the company to support the redemption of gift cards. When enabled, the 'Aloha Enterprise Company Code,' 'Aloha Enterprise API User,' and 'Aloha Enterprise API Password' options appear. When disabled, the company does not accept gift cards.

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Loyalty Processor — Specifies the Loyalty processor used by the company. You must enable 'Loyalty' to enable this option. Select from Clutch, Aloha, or None.

Reward Dollars Not Used — indicates the customer does not use the Rewards Dollars (Cashback Rewards) feature in Clutch and the amount does not appear on the ordering website. ***Required Options:*** You must select Clutch from the 'Loyalty Processor' drop-down list to enable this option.

Aloha Enterprise Company Code — Used when Aloha Enterprise Loyalty and Aloha Stored Value Gift Cards are integrated with Digital Web. This should match the Aloha Enterprise ID for the company. This should be filled in by your NCR Voyix Representative or NCR Voyix support team during the integration process. ***Required Options:*** You must enable 'Gift Card' to enable this option.

Aloha Enterprise API User Account — Specifies the user account that communicates between the digital Web Services and the Enterprise Loyalty Services for gift card redemption. This information should be filled in by your NCR Voyix representative or NCR Voyix Support team during the integration process. ***Required Options:*** You must enable 'Gift Card' to enable this option.

Aloha Enterprise API Password — Specifies the password for the Aloha Enterprise API user. This information should be filled in by your NCR Voyix representative or NCR Voyix Support team during the integration process. ***Required Options:*** You must enable 'Gift Card' to enable this option.

Aloha Enterprise E-Pin Validation — Validates the electronic PIN on a virtual gift card from Aloha Enterprise. When disabled, the company cannot use virtual gift cards. ***Related Options:*** This option enables the 'Gift Card Prefix White List' option.

Gift Card Prefix White List — Specifies the gift card prefixes, separated by commas, that do not require an ePin validation. Before attempting to validate an ePin for a gift card, if the provided card begins with any of the prefixes provided in the list, the ePin should not be validated before processing. This option is used to distinguish between loyalty-based and physical stored value cards, which may not require an ePin entry. Typically, you would always include Aloha Loyalty gift card prefixes in this list. ***Required Options:*** You must enable 'Aloha Enterprise E-Pin Validation' to enable this option.

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Section: Advanced

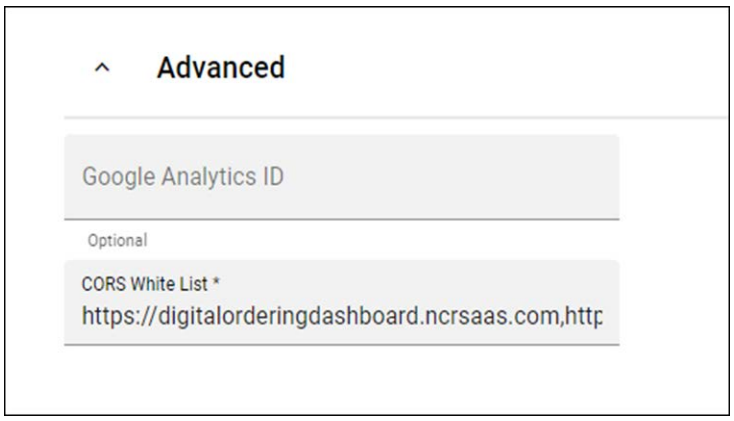

Figure 12 Company Settings - Company Setup - Advanced Section

Google Analytics ID — Specifies the tracking code to allow the company to measure advertising returns on investment, as well as track any social networking sites and applications. When you add the ID, Google Analytics tracks the number of visits to the Digital Ordering website. Upon entering the code, it may take up to twenty-four hours before your site data appears in your Google Analytics account.

CORS White List (Required) — Specifies the list of URLs that interact with the digital website. Do not remove the ones already listed in the white list as they are required for normal functionality: https://portal.ncrengage.com, https://api.ncrengage.com. Add any additional URL examples: https://domainprefix.alohaorderonline.com, https://domainprefix.alohaenterprise.com.

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ORDERING SETTINGS tab

Use the ORDERING SETTINGS tab to configure options related to the following sections:

- General
- Store Locator
- Order Time
- Order Limits
- Pickup Settings
- Delivery Settings
- Order Cancelation

Section: General

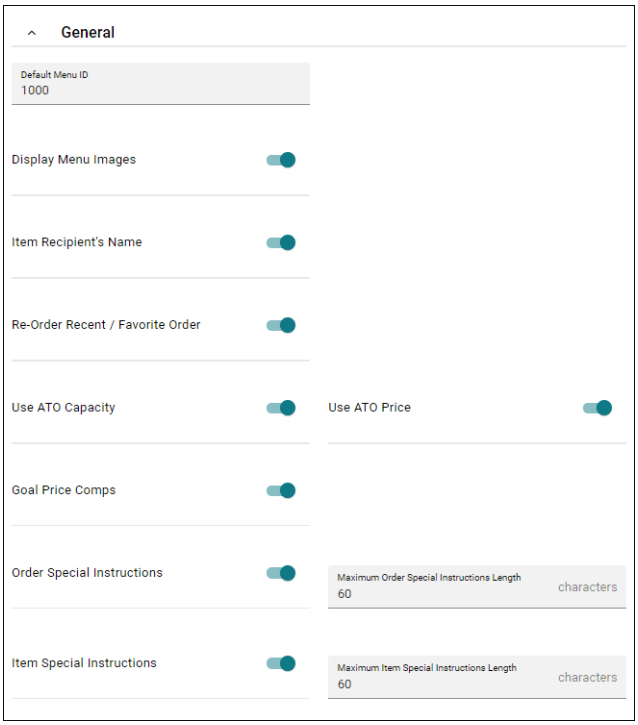

Figure 13 Company Settings - Ordering Settings - General Section

Default Menu ID — Identifies the ID of the default menu for the website, as defined in Menu Configurator.

Display Menu Images — Displays the images you associated with submenus, items, and modifiers on the Digital Ordering website. If you have not associated any images, you can clear this option and submenus, items, and modifiers appear as generic tiles, with no images. The default image is defined in the Images Editor function in "Configuring images for site elements" on page 45. When disabled, a stock menu card appears for all images.

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Item Recipient's Name — Displays the name of the consumer with each menu item to help individual consumers identify the items they ordered. When disabled, the name does not appear.

Re-Order Recent/Favorite Order — Allows consumers to place an order saved as a favorite or a previous order without navigating through the menu.

Use ATO Capacity — Allows Digital Ordering to use capacity settings in Aloha Takeout when providing the consumer with a promise time. When disabled, the system uses the configuration within Web Admin.

Use ATO Price — Uses the price generated from Aloha Takeout when providing the consumer with a promise time.

Goal Price Comps — Automatically applies goal price comps to an order.

Order Special Instructions — Allows consumers to add an instruction for the order. When disabled, the 'Special Instructions' option does not appear to the consumer.

Maximum Order Special Characters — Specifies the maximum number of characters consumers can add as an instruction for an order.

Order Item Instructions — Allows consumers to add an instruction for a menu item. When disabled, the 'Special Instructions' option does not appear to the consumer.

Maximum Item Special Characters — Specifies the maximum number of characters consumers can add as an instruction for an item.

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Section: Store Locator Settings

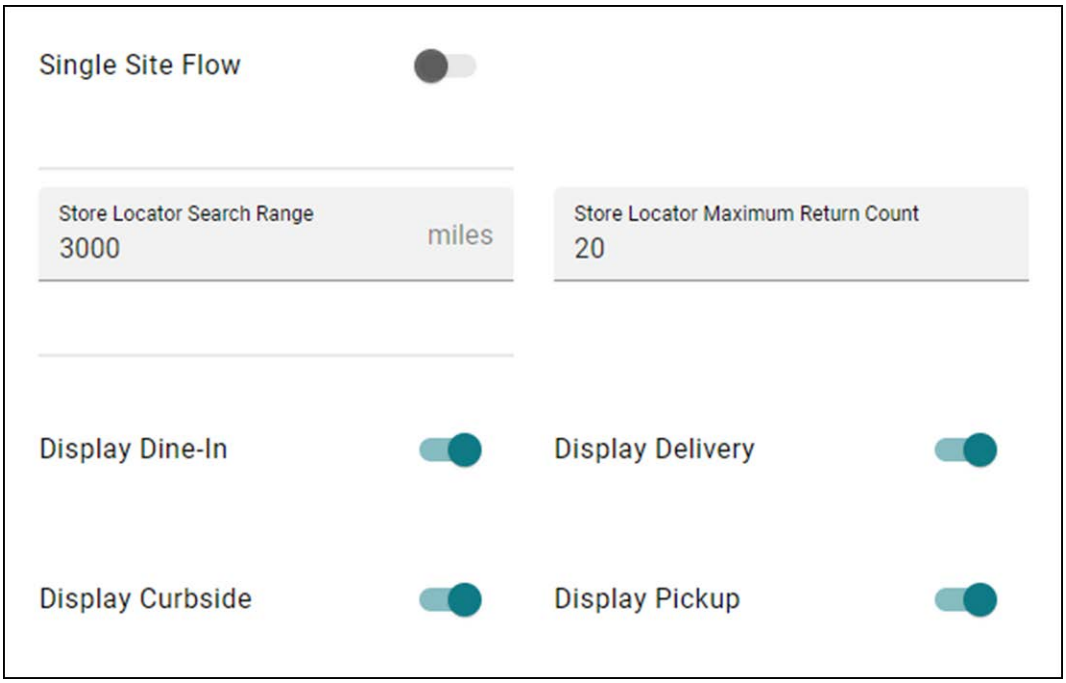

Figure 14 Company Settings - Ordering Settings - Store Locator Settings Section

Single Site Flow — Allows consumers to bypass the selection of a site for a quicker ordering flow. Use this option for sites that only have one selection from which to choose. When disabled, consumers must select a site before ordering.

Store Locator Search Range — Specifies the maximum number of miles around the consumer's address to include in the store locator search results.

Store Locator Maximum Return Count — Specifies the maximum number of sites to return from a search.

Display Dine-In — Enables the Dine-In order mode as an option on the store locator. You must configure the site for dine-in in Web Admin and assign a menu to the location that allows the dine-in order mode to use this feature. This option is not required for the Contactless Dine-In QR code to work.

Display Delivery — Enables the Delivery order mode as an option on the store locator. You must configure the site for delivery in Web Admin and assign a menu to the location that allows the Delivery order mode to use this feature.

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Display Curbside — Enables the Curbside order mode as an option on the store locator. To use this feature, you must configure curbside ordering in Web Admin and assign a menu to the location that allows the Pickup order mode.

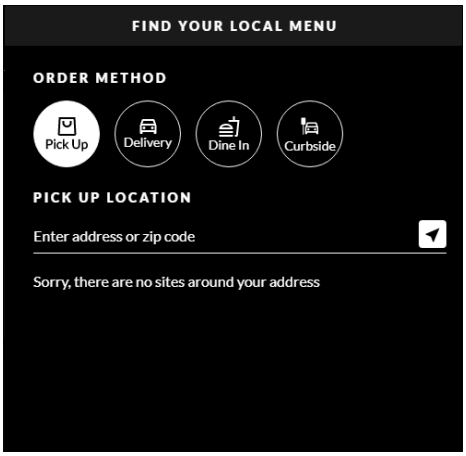

Figure 15 Find Your Local Menu Screen

Display Pickup — Enables the Pick Up order mode as an option on the store locator at the company level. You must configure the site for pickup in Web Admin and assign a menu to the location that allows the Pickup order mode to use this feature.

Section: Order Time

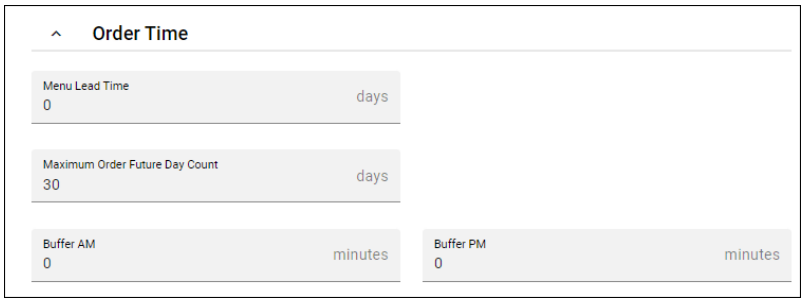

Figure 16 Company Settings - Ordering Settings - Order Time Section

Menu Lead Time — Specifies the number of days in the future a company can use as a buffer for the first available order. The order time available is always the first available time for that day. You can create menu lead time days as a company setting, and you can create a site setting to override the value in company settings.

Maximum Order Future Day Count — Specifies the maximum number of days in advance consumers can place a future order.

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Buffer AM — Specifies the number of minutes after a store opens at which the store can begin accepting online orders.

Buffer PM — Specifies the number of minutes before a store opens at which the store stops accepting online orders.

Section: Order Limits

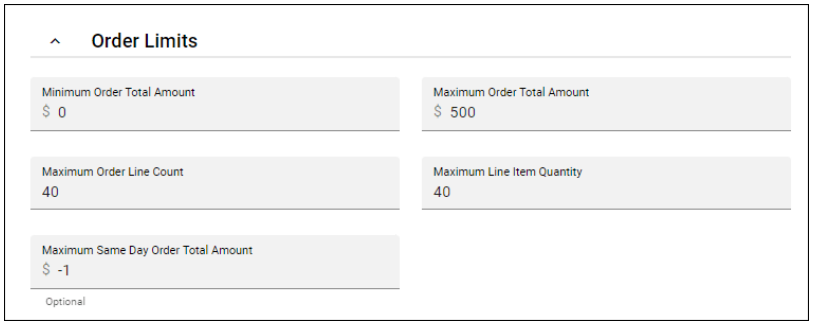

Figure 17 Company Settings - Ordering Settings - Order Limits Section

Minimum Order Total Amount — Specifies the minimum amount a consumer can purchase for an order.

Maximum Order Total Amount — Specifies the maximum amount a consumer can purchase for an order.

Maximum Order Line Count — Specifies the maximum number of items a consumer can place for an order.

Maximum Line Item Quantity — Specifies the maximum quantity of an item a consumer can order, per line item.

Maximum Same Day Order Total Amount — Specifies the maximum amount a consumer can purchase for the same day.

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Section: Pickup Settings

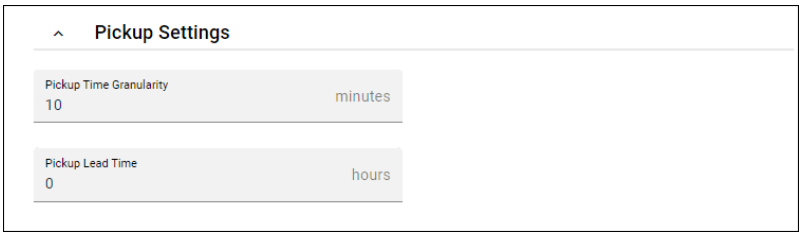

Figure 18 Company Settings - Ordering Settings - Pickup Settings Section

Pickup Time Granularity — Determines the increment of minutes to appear to the consumer in the pickup time options.

Pickup Lead Time — Specifies the number of hours in the future for the first available order time for pickup orders. The hours calculate in exact calendar hours from the current time.

Section: Delivery Settings

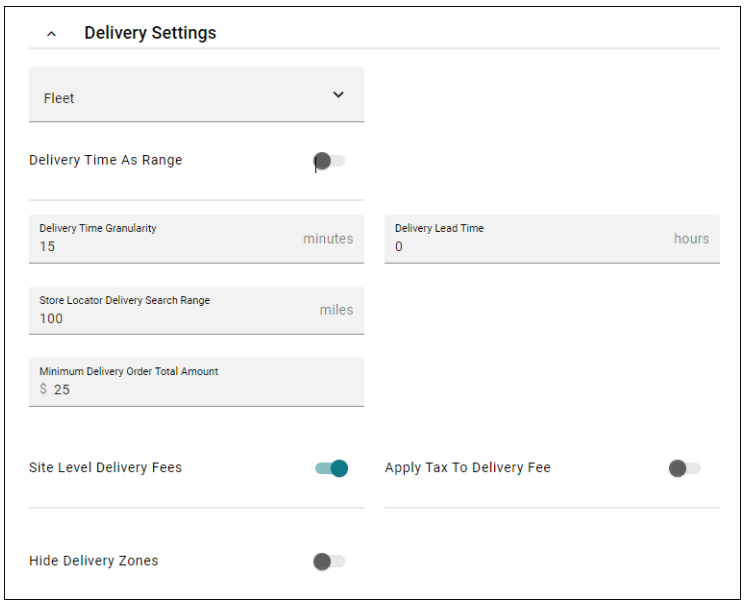

Figure 19 Company Settings - Ordering Settings - Delivery Settings Section

Delivery Type — Identifies the type of delivery used by the company. Select from Fleet or External for a third-party delivery.

Delivery Time As Range — Displays the quoted delivery time as a range of time. For example, if you set 'Delivery Time Granularity' to '30,' the consumer sees the delivery time in a range of time, such as 12:00-12:30 and 12:30-1:00.

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Delivery Time Granularity — Determines the increment of minutes to appear to the consumer in the delivery time options.

Delivery Lead Time — Specifies the number of hours in the future for the first available order time for delivery orders. The hours calculate in exact calendar hours from the current time.

Store Locator Delivery Search Range — Specifies the maximum number of miles around the consumer's address to include in the store locator search results for a delivery order.

Minimum Delivery Order Total Amount — Specifies the minimum amount a consumer must purchase to place a delivery order.

Site Level Delivery Fees — Uses delivery fees configured in the Aloha POS system and Aloha Takeout. When disabled, the system uses the delivery fees configured in Web Admin.

Apply Tax to Delivery Fee — Applies taxes to the delivery fee. When disabled, a tax is not applied to delivery fees.

Hide Delivery Zones — Does not show delivery zones on the website. This feature is not currently supported.

Section: Order Cancelation

The options for the 'Order Cancelation' section are not currently supported for Digital Ordering.

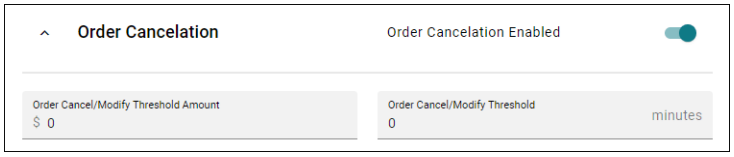

Figure 20 Company Settings - Ordering Settings - Order Cancelation Section

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CHECKOUT AND PAYMENTS tab

Use the CHECKOUT AND PAYMENTS tab to configure options related to the following sections:

- General
- Guest Checkout
- Checkout Limit
- Payments
- Payments Authorization

Section: General

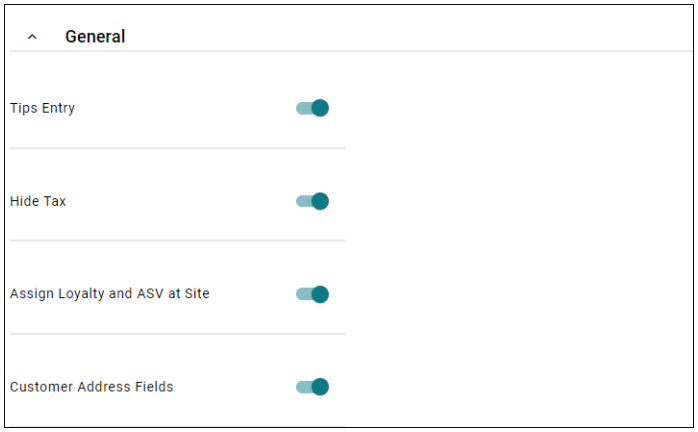

Figure 21 Company Settings - Checkout and Payments - General Section

Tip Entry — Displays the tip entry option and allows a consumer to add a tip to their order. When disabled, the entry does not appear on the website.

Hide Tax — Does not show taxes on the Digital Ordering website. When disabled, taxes always appear.

Assign Loyalty and ASV at Site — Allows sites to access stored loyalty data at the site instead of using cloud storage. The ASV gift card covers the full amount of the order and the message 'Amount Due will be deducted from Gift Card when payment is processed at the Site' appears. When disabled, sites use cloud storage. ***Related Options:*** When this option is disabled, and 'Enable ATO Deposits' is enabled, the consumer cannot submit an order.

Customer Address Fields — Displays entry fields and forces consumers to enter their address when placing an order. When disabled, the entry fields do not appear. This is not currently supported in Digital Ordering.

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Section: Guest Checkout

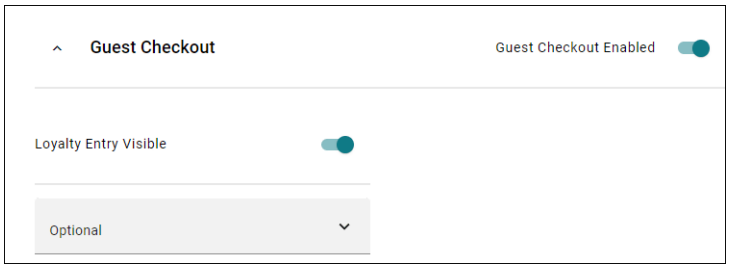

Figure 22 Company Settings - Checkout and Payments - Guest Checkout Section

Guest Checkout Enabled — Allows a consumer to check out. This is always enabled for Digital Ordering even when you disable this option.

Loyalty Entry Visible — Displays entry fields and allows a consumer to enter their loyalty number on the website. When disabled, the entry fields do not appear.

'Loyalty' drop-down — Determines the enforcement for entering a loyalty number on the website. Select from Optional, Required, and Disabled.

Section: Checkout Limit

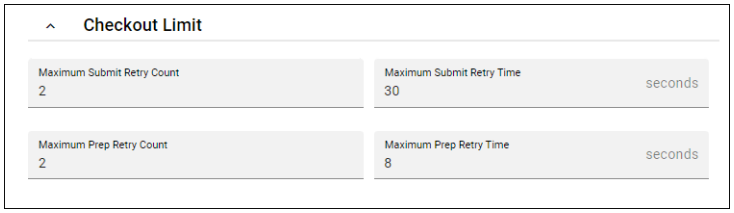

Figure 23 Company Settings - Checkout and Payments - Checkout Limits Section

Maximum Submit Retry Count — Specifies the maximum number of times a consumer can attempt to submit an order after they click Submit Order. An order may not submit due to capacity overload or an internal error.

Maximum Submit Retry Time — Specifies the maximum number of seconds the website allows for submitting an order after a consumer clicks Submit Order. An order may not submit due to capacity overload or an internal error.

Maximum Prep Retry Count — Specifies the maximum number of attempts the site can make to retrieve the prep time and display the promise time.

Maximum Prep Retry Time — Specifies the maximum number of seconds the site allows for the retrieval of the prep time from the site to display the promise time to the consumer.

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Section: Payments

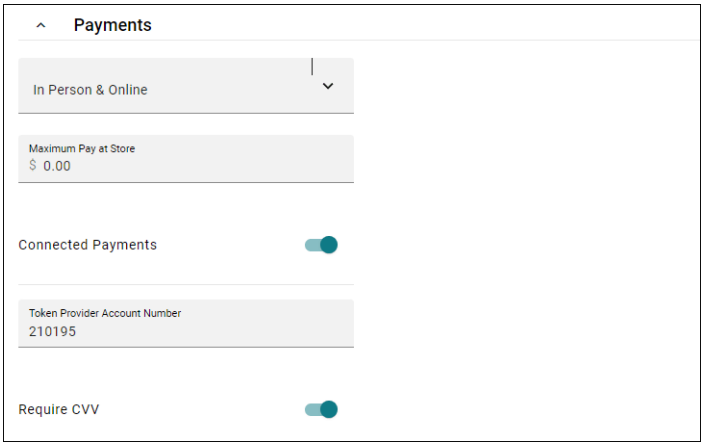

Figure 24 Company Settings - Checkout and Payments - Payments Section

'Payments' drop-down — Specifies how you allow consumers to pay for their order.

In Person — Enables the ability for the consumer to pay at the store upon arrival only.

Online — Enables the ability for the consumer to pay online prior to arrival only.

In Person & Online — Enables the ability for the consumer to pay online and at the store.

Maximum Pay At Store — Specifies the maximum amount a consumer can purchase for their order, if they want to pay at the site. ***Required Options:*** You must select 'In Person' or 'In Person & Online' from the 'Payments' drop-down list to enable this option.

Connected Payments — Allows sites to use the Connected Payments product for processing payments. When disabled, sites do not use Connected Payments.

Token Provider Account Number — Identifies the account number associated with the Connected Payments token. ***Required Options:*** You must enable 'Connected Payments' to enable this option.

Require CVV — Requires a consumer to enter the CVV value on their payment card. When disabled, the CVV value is optional.

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Section: Payments Authorization

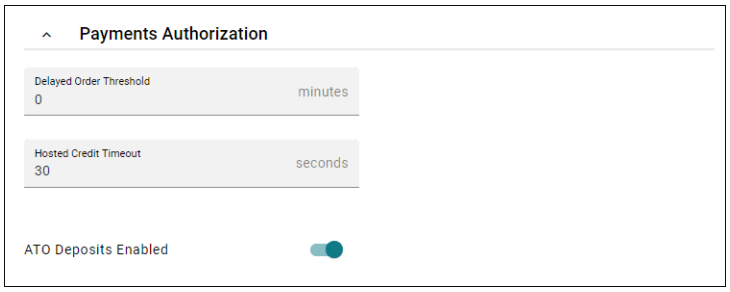

Figure 25 Company Settings - Checkout and Payments - Payments Authorization Section

Delayed Order Threshold — Specifies the number of minutes the system holds an order based on the promise time. The value must match the on-site prep time in Web Admin. This option also determines the length of time future orders are visible. ***Related Options:*** You must set this value to 0 (zero) to enable the 'ATO Deposits Enabled' option.

Hosted Credit Timeout — Specifies the number of seconds to wait for approval from a third-party merchant processor, when capturing a payment, upon order submission to the Aloha POS system. When the timeout expires, an error message appears to the consumer. We recommend to keep the value large enough so the card is not charged at the same time the website times out.

ATO Deposits Enabled — Charges a payment card transaction at the time of order submittal. If a merchant processor declines a payment card, a notification appears to the consumer and requests another form of payment. This feature may require additional configuration in Aloha Takeout and the Aloha POS system. When disabled, the system does not validate payment when the consumer submits an order. ***Required Options:*** You must type a value greater than 0 (zero) in 'Delayed Order Threshold' to enable this option.

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SUPPORT NOTIFICATIONS tab

Use the SUPPORT NOTIFICATIONS tab to configure options related to the following sections:

- General
- Order BCC List

Section: General

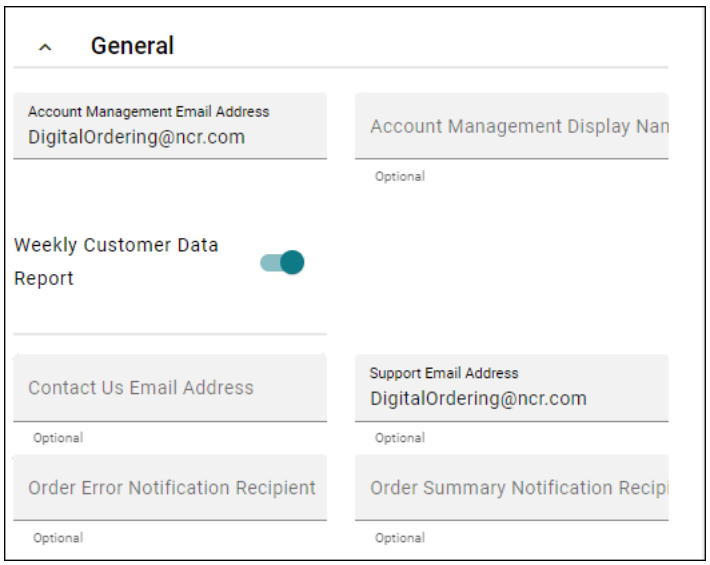

Figure 26 Company Settings - Support Notifications - General Section

Account Management Email Address — Specifies the email address for sending automatically generated emails to the site. You can enter additional email addresses separated by a semicolon.

Account Management Display Name — Specifies the name to insert in the 'From' field on the automatically generated email messages sent to the address specified in 'Account Management Email Address.'

Weekly Management Email Address — Sends a customer export as a .csv file to the recipient. When disabled, the report is not sent.

Contact Us Email Address — Specifies the email address to allow consumers to send customer feedback. This is not currently used in Digital Ordering.

Support Email Address — Specifies the email address to populate in the 'From' field for correspondence between a support team to the consumer. This is not currently used in Digital Ordering.

Order Error Notification Recipient — Specifies the name to populate in the 'To' field for correspondence between a support team to the consumer.

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Order Summary Notification Recipient — Specifies the name to populate in the 'To' field when the consumer receives a daily short summary of each order placed with the site.

Section: Order BCC List

Figure 27 Company Settings - Support Notifications - Order BCC List Section

Enter Email Address — Lists the email addresses to blind carbon copy (BCC) when sending automatically-generated order notification email messages to the consumer. Click ADD to add each email.

MARKETING tab

Use the MARKETING tab to configure options related to the following sections:

- Mobile App Links
- Social Media

Section: Mobile App Links

The 'Mobile App Links' section is only used by Engage Mobile and is not applicable to Digital Ordering.

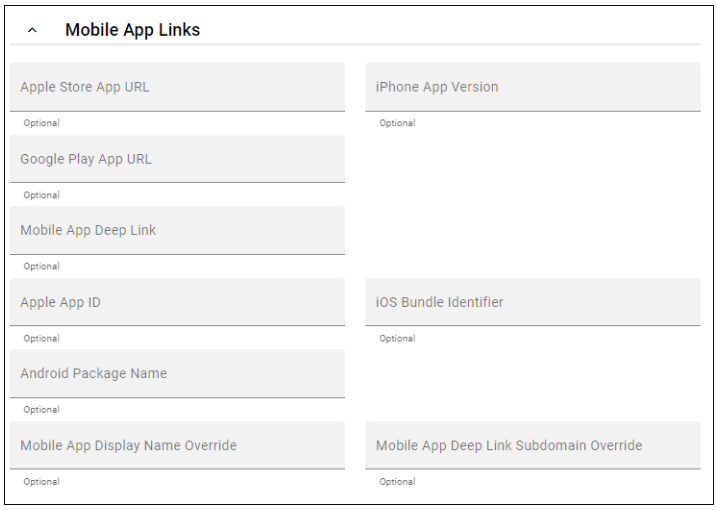

Figure 28 Company Settings - Marketing - Mobile App Links Section

Apple Store App URL — Specifies the URL that links to an application stored in the Apple Store. This can be the NCR Voyix Engage Mobile application.

IPhone App Version — Specifies the version of the iPhone App.

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Google Play App URL — Specifies the URL to the NCR Voyix Engage Mobile that links to an application stored in Google Play.

Mobile App Deep Link — Specifies the Mobile App Deep Link.

Apple App Deep Link — Specifies the Apple App Deep Link.

iOS Bundle Identifier — Specifies the iOS bundle ID assigned to your Engage Mobile App.

Android Package Name — Specifies the Android package name.

Mobile App Display Name Override — Specifies the Mobile App Display Name Override name.

Mobile App Deep Link Subdomain Override — Specifies the Mobile App Deep Link subdomain override.

Section: Social Media

The 'Social Media' section is only used by Engage Mobile and is not applicable to Digital Ordering.

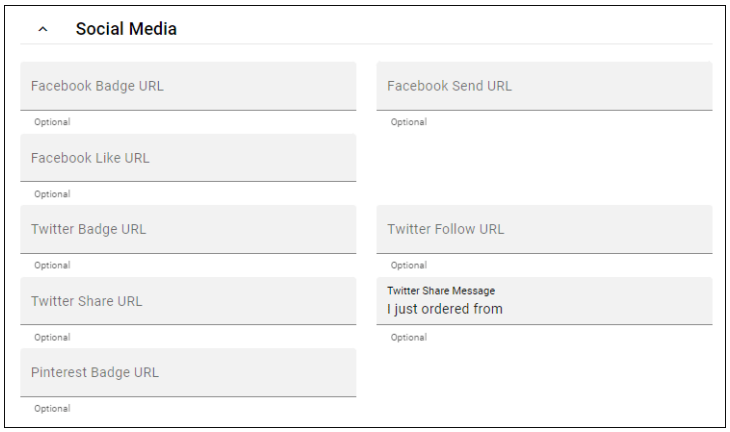

Figure 29 Company Settings - Marketing - Social Media Section

Facebook Badge URL — Specifies the URL to display the blue checkmark that appears next to the name of a Facebook profile.

Facebook Send URL — Specifies the URL to provide the ability to share a link from a Facebook page.

Facebook Like URL — Specifies the URL to provide the ability to 'like' a Facebook page

Twitter Badge URL — Specifies the URL to display the gold badge that appears next to the name of a Twitter profile.

Twitter Follow URL — Specifies the URL to provide the ability to follow a link from a Twitter page.

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Twitter Share URL — Specifies the URL to provide the ability to 'share' a Twitter page.

Twitter Share Message — Defines the message to include in a 'share' for a Twitter page.

Pinterest Badge URL — Specifies the URL to display the Pinterest logo.

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Configuring Sites

The Site Settings > Sites function allows you to define values for a site, such as the company name, culture, currency, and more, and overrides some global settings in the Company Settings function.

1. Select **Site Settings > Sites** in the navigation pane to open the Sites function. A list of sites appears.

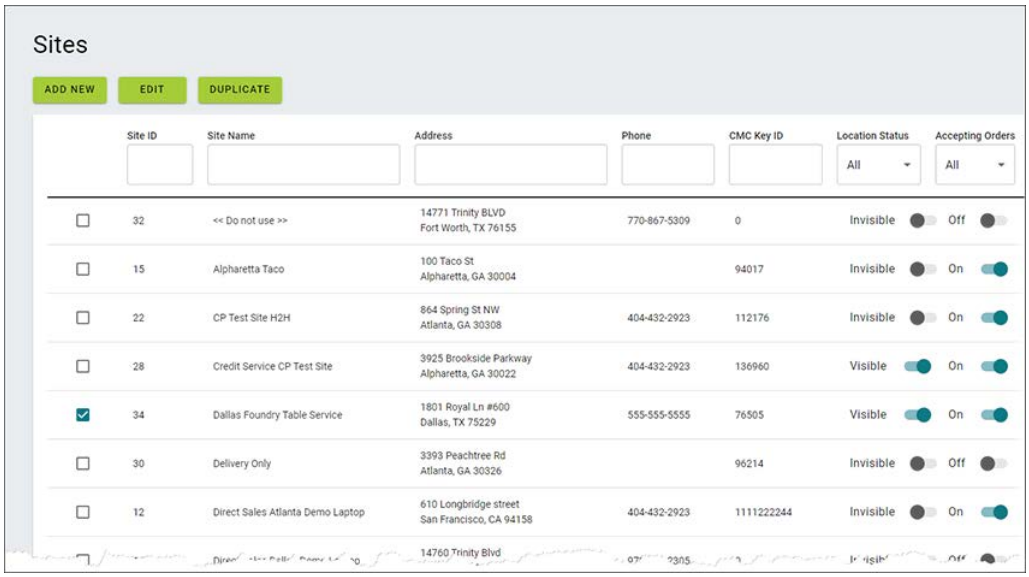

Figure 30 Site Settings > Sites Function

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2. Select an **existing site** and click **EDIT** or click **ADD NEW** to create a new site. The following screen appears with Site Details as the active tab.

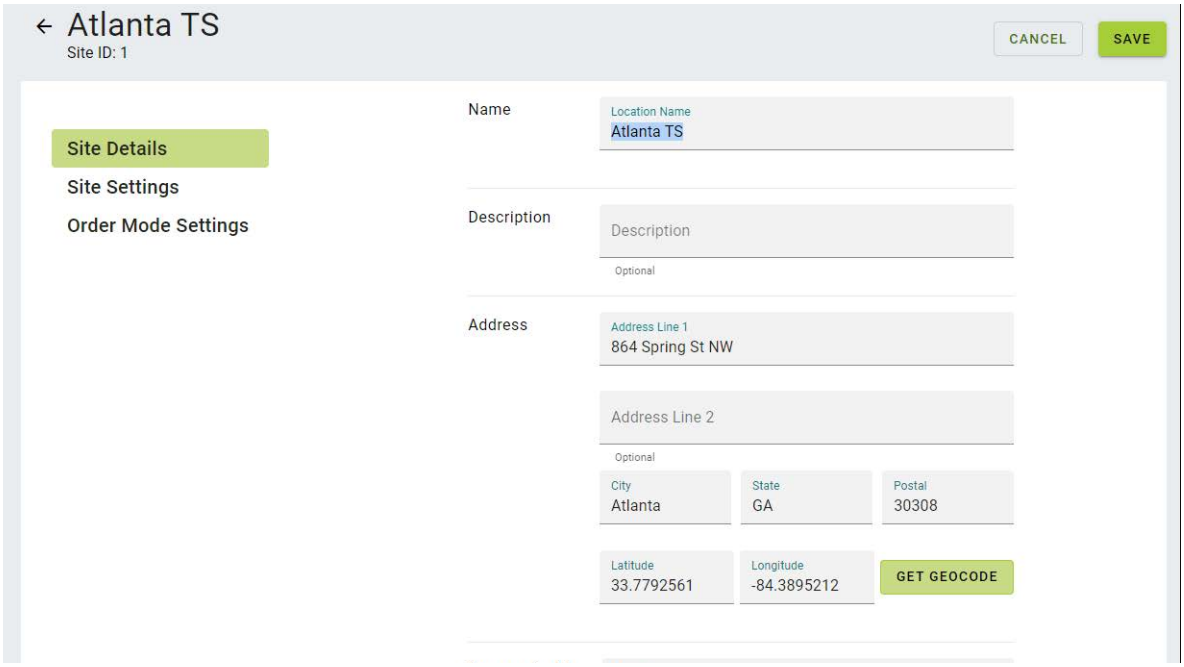

Figure 31 Sites - Site Details Tab

3. Use the **definitions** on the following pages to set values for the options that appear on each tab.
   "Site Details tab" on page 33.
   "Site Settings tab" on page 34.
   "Order Mode Settings tab" on page 37.
4. As a precaution, click **SAVE** between each tab before moving to the next tab.

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Site Details tab

Use the Site Details tab to configure the site name, address, phone number, and more, for the site.

Name — Identifies the name of the site.

Description — Denotes an optional description to identify the site.

Address — Specifies the address of the site.

Latitude — Designates the latitude of the location of the site. Click GET GEOCODE to automatically populate this option.

Longitude — Designates the longitude of the location of the site. Click GET GEOCODE to automatically populate this option.

GET GEOCODE — Allows you to automatically populate 'Latitude' and 'Longitude' based on the address of the site.

Phone Number — Identifies the primary and secondary phone numbers of the site.

Time Zone — Specifies the time zone used for the site.

External ID — Specifies the external ID for the site. This option is currently not used.

CMC Key ID — Specifies the Aloha HASP key used at the site during the provisioning of the site.

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Site Settings tab

Use the Site Settings tab to configure options related to the following sections:

General

Configuration

Payment Locations

Section: General

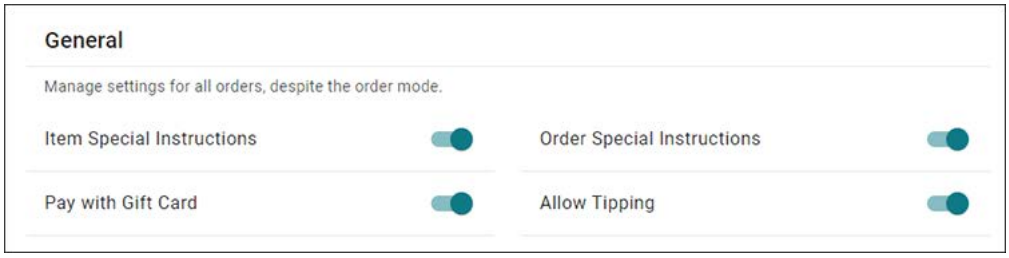

Figure 32 Sites - Site Settings - General Section

Item Special Instructions — Allows consumers to add a special instruction for a menu item. A 'Special Instruction' entry appears at the item level on the Digital Ordering website. When disabled, consumers cannot add special instructions for an item. ***Related Options:*** This option overrides the 'Item Special Instructions' option in Company Settings > Sites > ORDERING SETTINGS tab.

Order Special Instructions — Allows consumers to add a special instruction for an order. A 'Special Instruction' entry appears at the order level on the Digital Ordering website. When disabled, consumers cannot add special instructions for an order.

Pay with Gift Card — Allows consumers to pay with a gift card. A 'Gift Card' entry appears on the Digital Ordering website. When disabled, consumers cannot pay with a gift card.

Allow Tipping — Enables a consumer to enter a tip through a 'Tip' entry on the Payments screen. This also enables a Suggested Tip screen as an option for entering a custom tip. If the order is under $10.00 dollars, the suggested tip is $1.00, $2.00, and $3.00, plus a custom option. If the order is over $10.00 dollars, the suggested tip is calculated at 18, 20, and 25 percent, plus the custom option. When disabled, consumers cannot add a tip.

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Section: Configuration

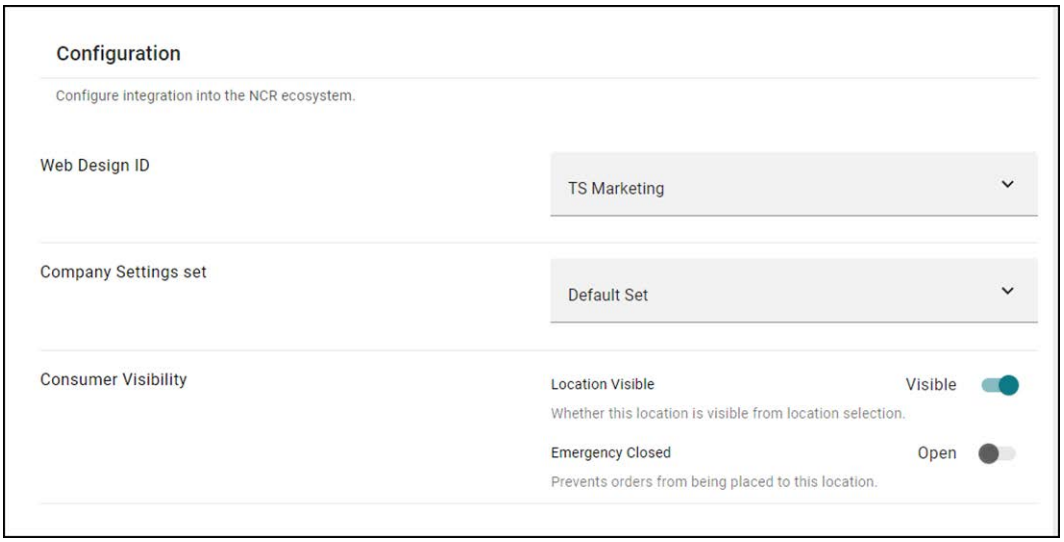

Figure 33 Sites - Site Settings - Configuration Section

Web Design ID — Designates the web design ID to use for the site menus. The web design ID is found in Web Admin.

Company Settings Set — Designates the company settings set for the site. The set is defined in the Company Settings function.

Location Visible — Displays the site on the Digital Ordering website. When disabled, the site is hidden.

Emergency Closed — Allows consumers to place orders from the Digital Ordering website. When disabled, consumers cannot place orders and they receive the 'Not Accepting Orders' screen. Use this option for cases when the site is not ready to receive orders, such as during implementation. You can leave this option to 'Open' and control the visibility on demand in "Controlling online order acceptance" on page 80.

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Section: Credit Processing Mode

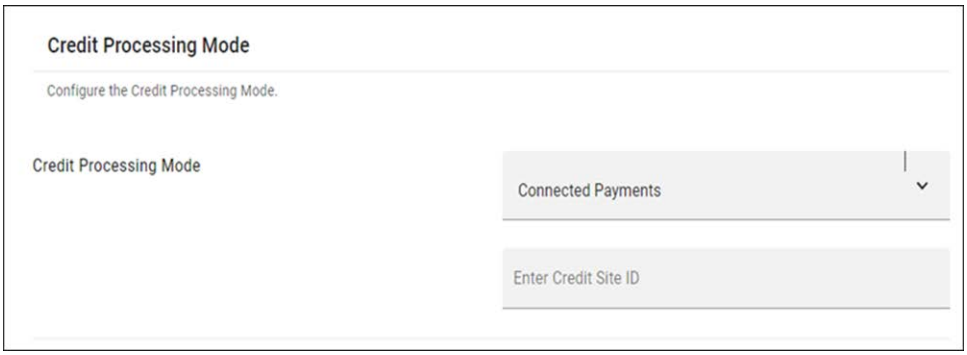

Figure 34 Sites - Site Settings - Credit Processing Mode Section

Credit Processing Mode — Specifies the mode by which Digital Ordering processes payments cards. Select from Integrated and Connected Payments.

Credit Site ID — Specifies the ID of the site that processes credit card payments through Connected Payments. ***Required Options:*** You must select 'Connected Payments' from the 'Credit Processing Mode' drop-down list to enable this option.

Section: Payment Locations

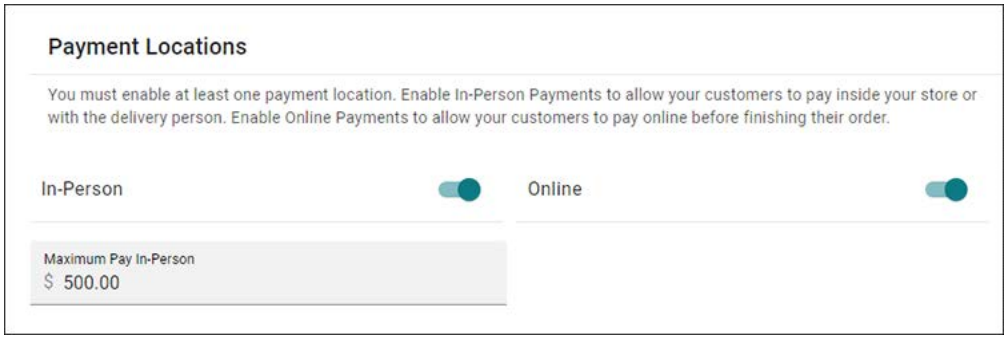

Figure 35 Sites - Site Settings - Payment Locations Section

In-Person — Allows consumers to pay for their order on premise.

Online — Allows consumers to pay for their order online.

Maximum Pay In-Person — Specifies the maximum amount a consumer must purchase to pay for their order on premise.

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Order Mode Settings tab

Use the Order Mode Settings tab to configure options related to the following sections:

Pickup Settings

Delivery Settings

Dine-In Settings

Section: Pickup Settings

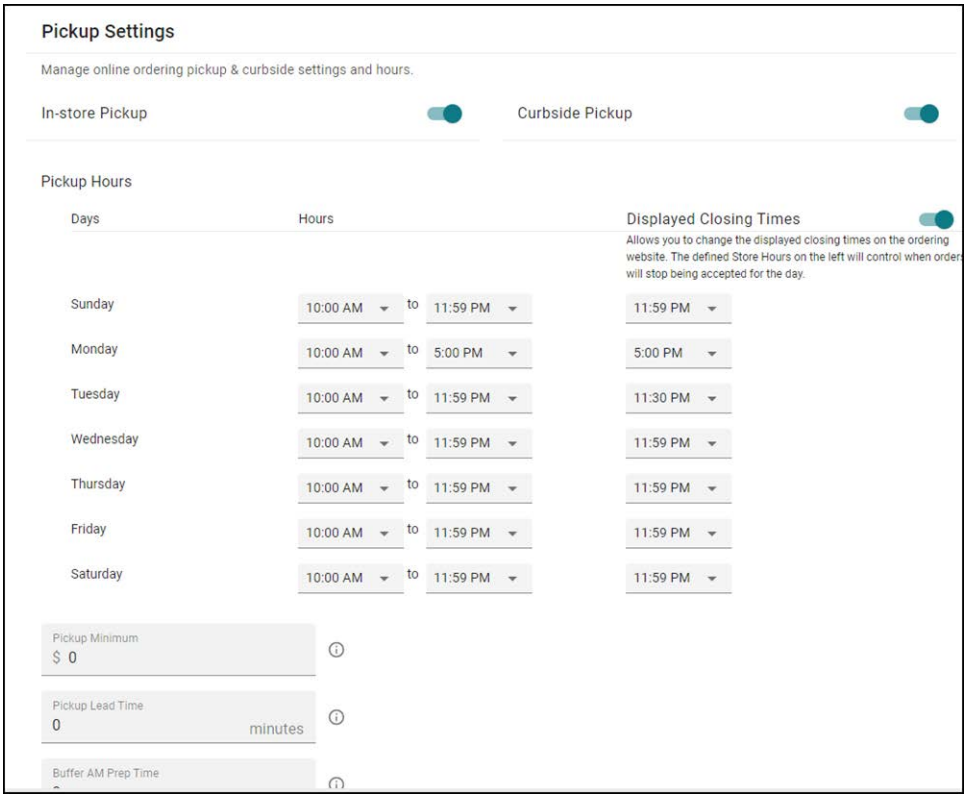

Figure 36 Sites - Order Mode Settings - Pickup Settings Section

In-store Pickup — Allows you to specify the available days and hours for consumers who enter the location to pick up their orders.

Curbside Pickup — Allows you to specify the available days and hours for consumers who pick up their order outside of the location.

Pickup Hours: Days and Hours — Specifies the starting time, from Sunday through Saturday, consumers can pick up their order. Select 24 Hours if there is no time restriction for the day. Select Closed if pickup is not available for the day.

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Pickup Hours: Displayed Closing Time — Specifies a closing time that is earlier than the closing pickup time while still accepting online orders past the time. The displayed closing time appears on the online ordering site. This allows the site to designate hours to leave the kitchen open for online orders and not give the impression the consumer can walk into the location to order after the displayed closing time. The times in the 'Displayed Closing Time' pick list adhere and adjust based on the days and hours defined in 'Pickup Hours: Days and Hours.' You cannot set the displayed closing time to occur after the closing pickup time.

Pickup Minimum — Specifies the minimum dollar amount required for a pickup order.

Pickup Lead Time — Specifies the number of hours between when the order is placed and when pickup is allowed.

Buffer AM Prep Time — Specifies the number of minutes after the store opens when consumers can place an order.

Section: Delivery Settings

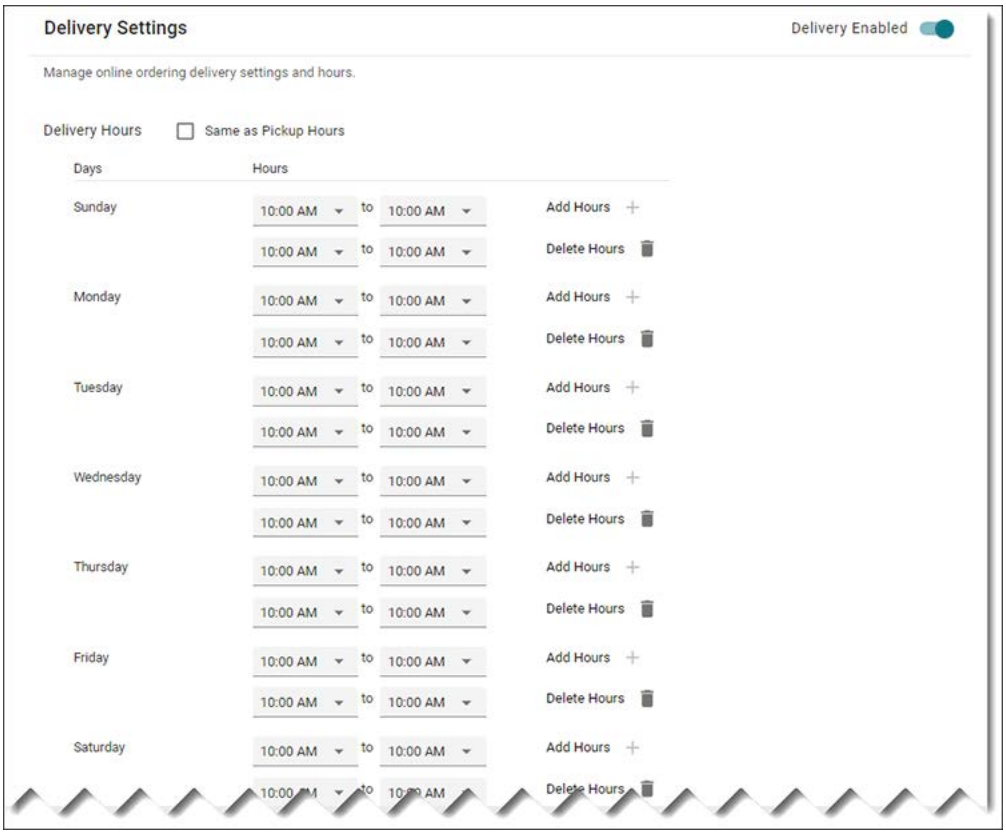

Figure 37 Sites - Order Mode Settings - Delivery Settings Section

Delivery Enabled — Allows you to specify the available days and hours when consumers can receive their orders through delivery.

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Same as Pickup Hours — Enables you to set and populate the delivery days and hours the same as for pickup days and hours.

Delivery Hours: Days and Hours — Specifies the starting time, from Sunday through Saturday, consumers can receive their orders through delivery. Select 24 Hours if there is no time restriction for the day. Select Closed if delivery is not available for the day.

Delivery Mode — Specifies the type of delivery service used by the store.

Fleet — Indicates delivery is provided at the store.

External — Indicates the site uses an external delivery service.

Delivery Minimum — Specifies the minimum purchase amount required for consumers to place a delivery order.

Buffer AM Prep Time — Specifies the number of minutes after the store opens when the store begins accepting delivery orders.

Delivery Lead Time — Specifies the number of hours required between when the order is placed and when delivery is allowed.

Delivery Range — Defines the maximum delivery distance from the store.

Section: Dine-in Settings

Figure 38 Sites - Order Mode Settings - Dine-in Settings Section

Dine-in Enabled — Enables dine-in orders at the site. When disabled, dine-in orders are not allowed at the site.

Require Table Number — Specifies the QR code includes a table number, when the consumer is onsite and entering an order using a QR code.

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Configuring menu imagery

Menu imagery is an important part of your Digital Ordering website and visually identifies the areas on the menu for consumers to select. When a consumer decides on an item to add to their order, they can see an image of the item they are ordering. All images are .png files and all dimensions discussed in this document are in pixels. Do not use spaces in the file names. Either omit spaces in the file name or insert underscores, such as 'FrenchFries.png' or 'French_Fries.png.' You may want to enlist a graphic designer for this task.

You can associate images with the following elements:

- Submenus
- Menu items
- Web sales groups
- Modifier items

Reference
Refer to Configuring Menu Imagery - HKS1517 for more information.

Configuring site colors

Click Studio > Colors in the navigation pane to access the Color Editor function and customize the color scheme for the restaurant website.

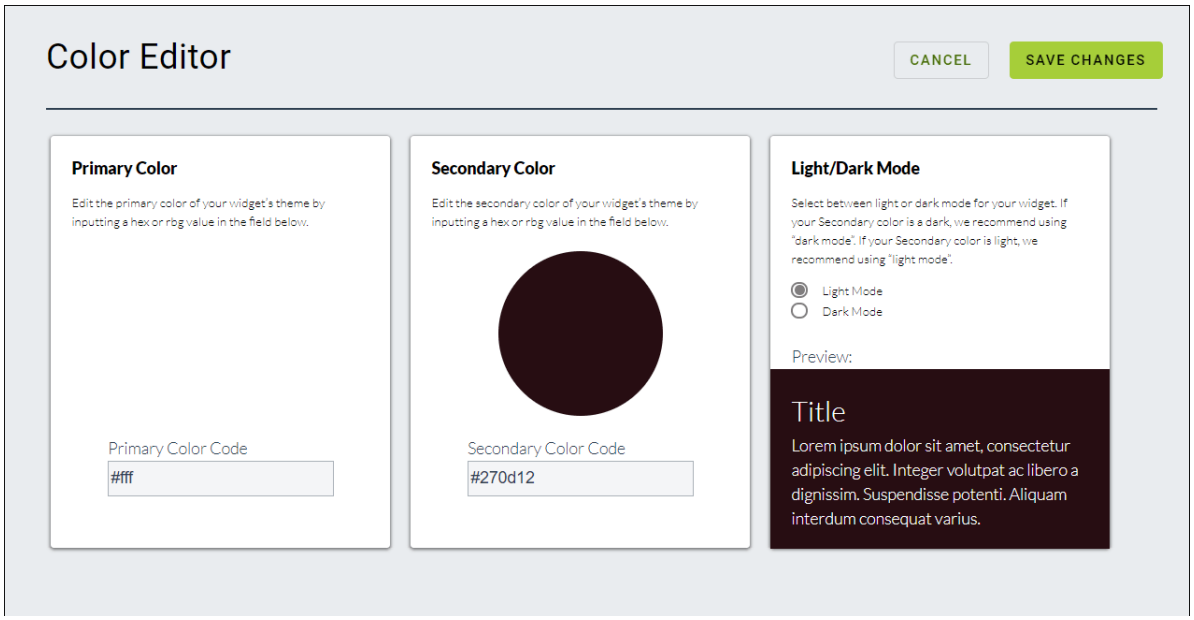

Figure 39 Color Editor Function

You can change the following:

Primary Color specifies the color to use for 'call-to-action' buttons, titles, and icons.

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Secondary Color specifies the color to use on the background of the website.

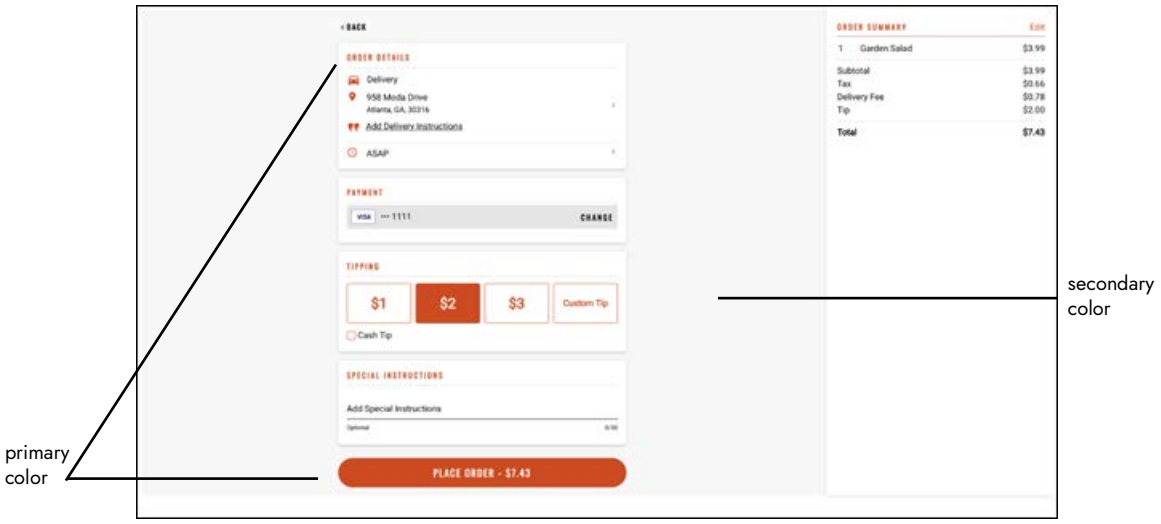

Figure 40 Primary and Secondary Colors on a Website

Light/Dark Mode sets the background of the website in light or dark mode, with respect to the primary and secondary colors. Light mode is ideal for darker secondary colors. Dark mode is ideal for lighter secondary colors.

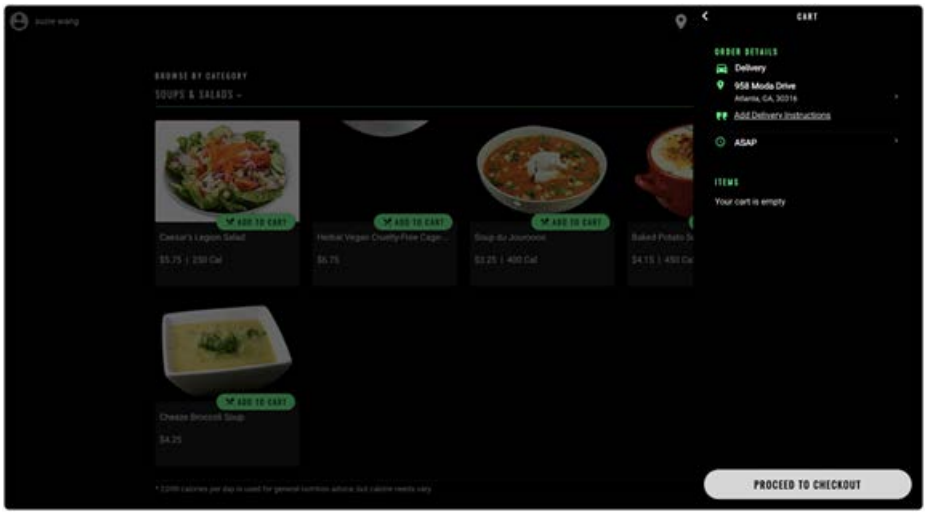

Figure 41 Dark Mode Background on a Website

To configure colors for a website:

1. Click **Studio > Colors** in the navigation pane to open the Color Editor function.
2. In the Primary Color pane, type the **hex color** or **RBG value** in 'Primary Color Code.'
3. In the Secondary Color pane, type the **hex color** or **RBG value** in 'Secondary Color Code.'

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4. In the Light/Dark Mode pane, select **Light Mode** or **Dark Mode**.
5. Click **SAVE CHANGES**.

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Configuring site strings

Click Studio > Strings in the navigation pane to access the Strings function and change the text that appears on the Digital Ordering website. You can also change the text to support a different language. These text elements on this function are only configured here because they are either not present in Menu Configurator, not embedded in an image, or not editable from the Live Editor function.

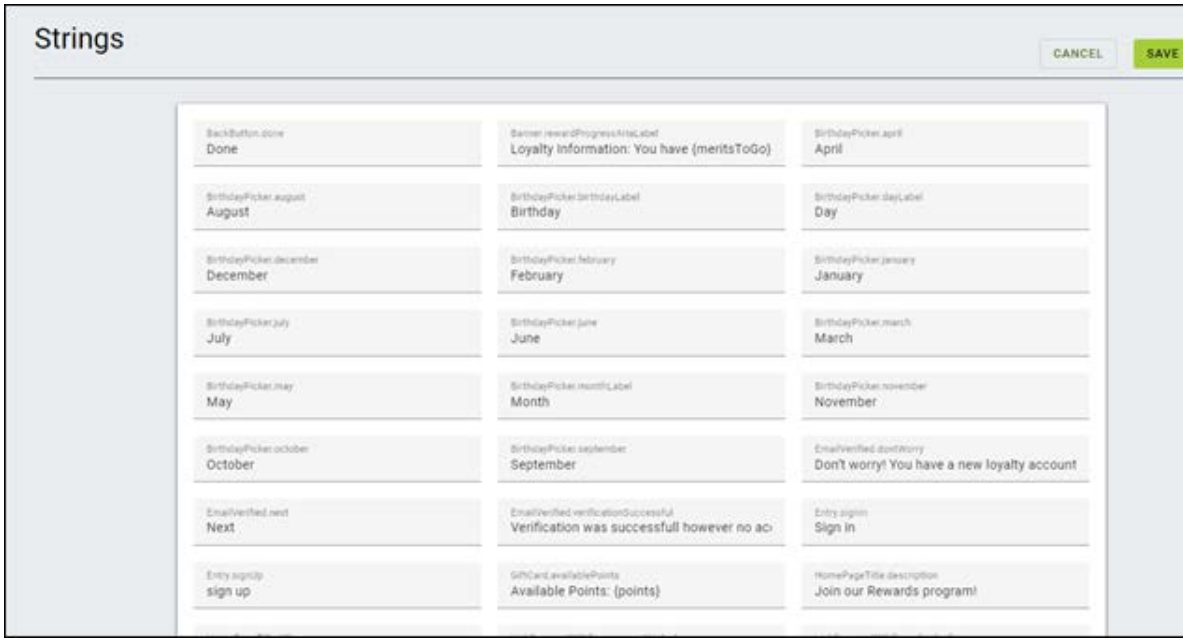

Figure 42 Strings Function

For example, you can change the text for the 'Schedule an Order' button to 'Future Order.'

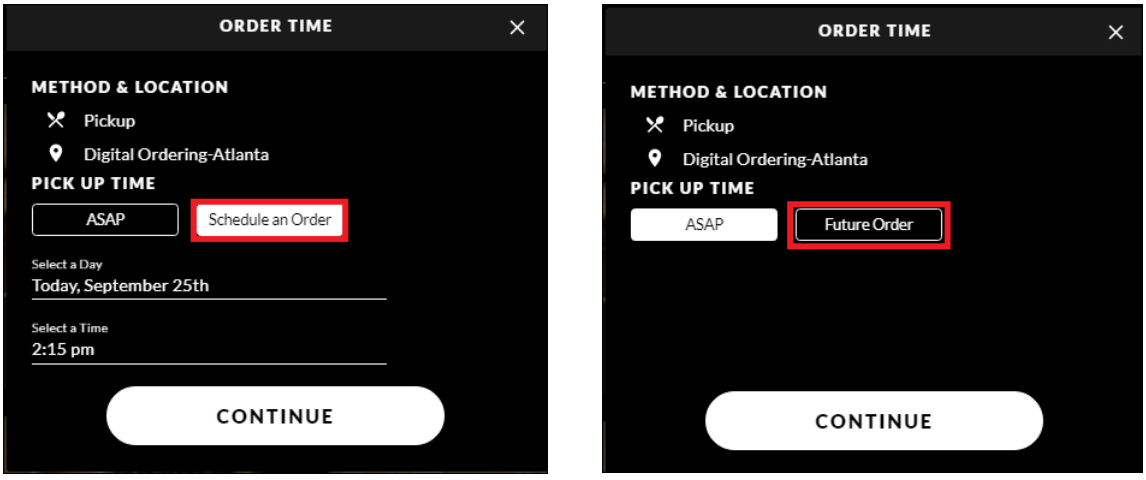

Figure 43 Schedule an Order Button Changed to Future Order

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To change a text string:

1. Click **Studio > Strings** in the navigation pane to open the Strings function.
2. Scroll down and select the **string** to change.

   -OR-

   Type **Ctrl+F** to open a 'search' box and type the **exact text**, or a **portion** of the text, in 'Find.'
3. While the string is editable, type the **text** to appear in its place.
4. Click **SAVE CHANGES**.
5. To review your change, refresh your **browser** or start a **new order**. You cannot use cached browser data.

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Configuring images for site elements

Click Studio > Images in the navigation pane to access the Image Editor function and associate images to specific elements of a website. Most images only apply to customers who has loyalty. You must still configure menu item images in Web Admin.

You can configure the following images:

- Account_Info_Checkered.png
- App_Store_Badge.png
- Apple_Store_Badge.png
- AvailableRewardIcon.png
- Credit_Card.png
- Default_Profile.png *
- Dine_In_Landing.png* — Specifies the image to appear when the consumer scans a QR code with the Contactless Dine-in feature. By default, the system uses the 'Vip_Members.png,' or, if one is not defined, a stock 'DINE IN' image.
- Google_Play_Badge.png
- Homepage_Background.png *
- Item_Default.png *
- Logo.png *
- Loyalty_Card.png *
- OrdersRewardIcon.png *
- SmallOrdersRewardIcon.png *
- VIP_Members.png *

* no example provided.

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To configure images for a site element:

1. Click **Studio > Images** in the navigation pane to open the Image Editor function.

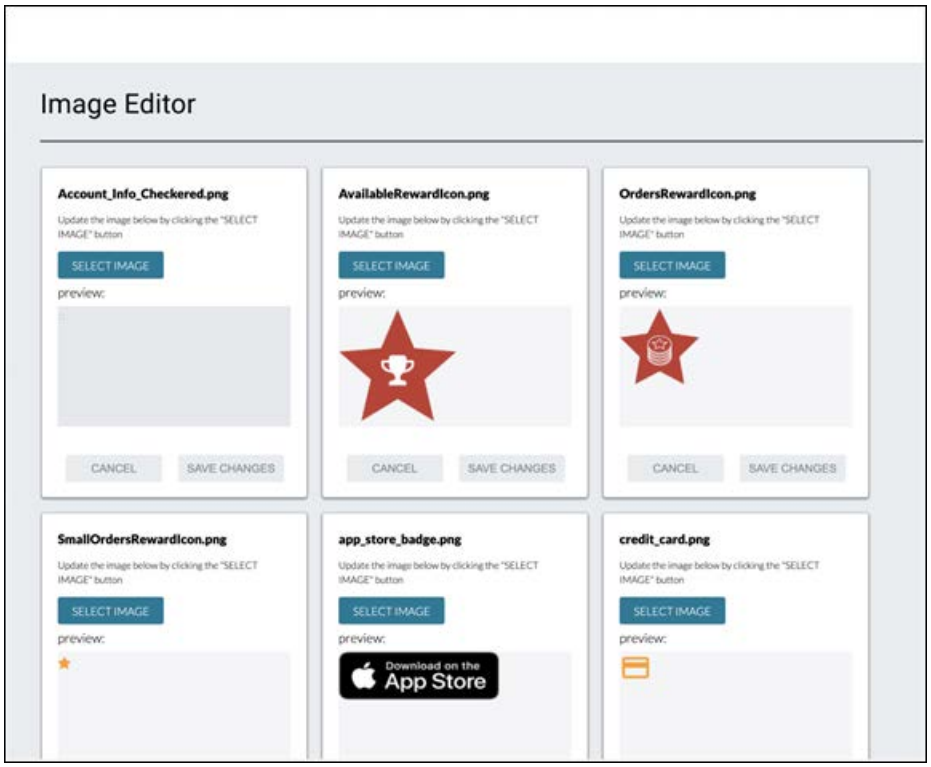

Figure 44 Image Editor Function - Top of Page

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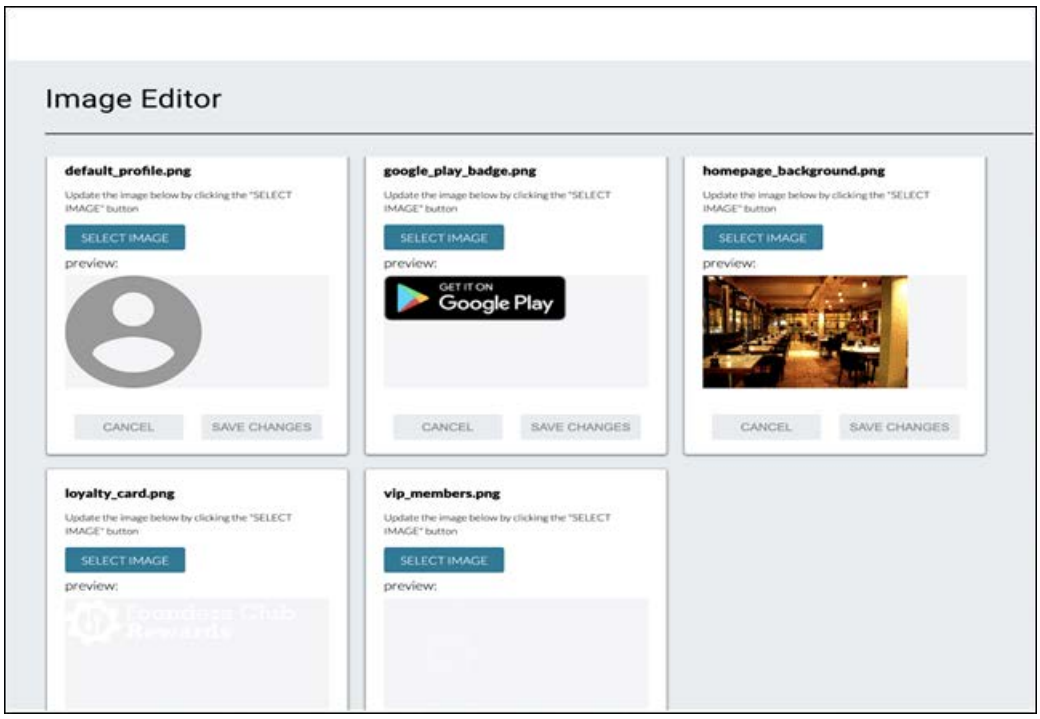

Figure 45 Image Editor Function - Bottom of Page

2. Select a **tile** on which to add an image.
3. Click **SELECT IMAGE**. A file explorer window opens.
4. Click **Browse**, locate the **image** to use, and click **Open**.
5. Review the **image** in the preview window to confirm it is the correct image.
6. Click **SAVE CHANGES**.

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Credit card image on website

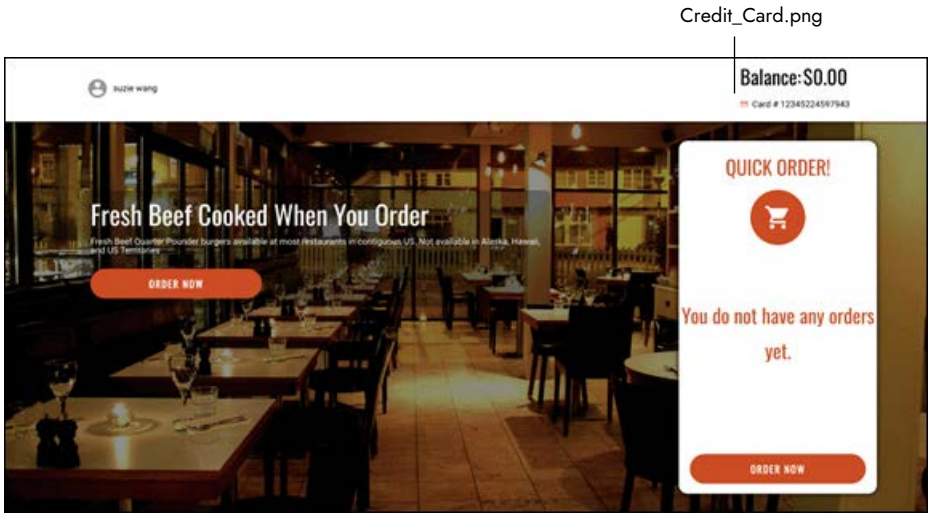

Figure 46 Credit_Card.png Image on Website

Account info checkered image on website

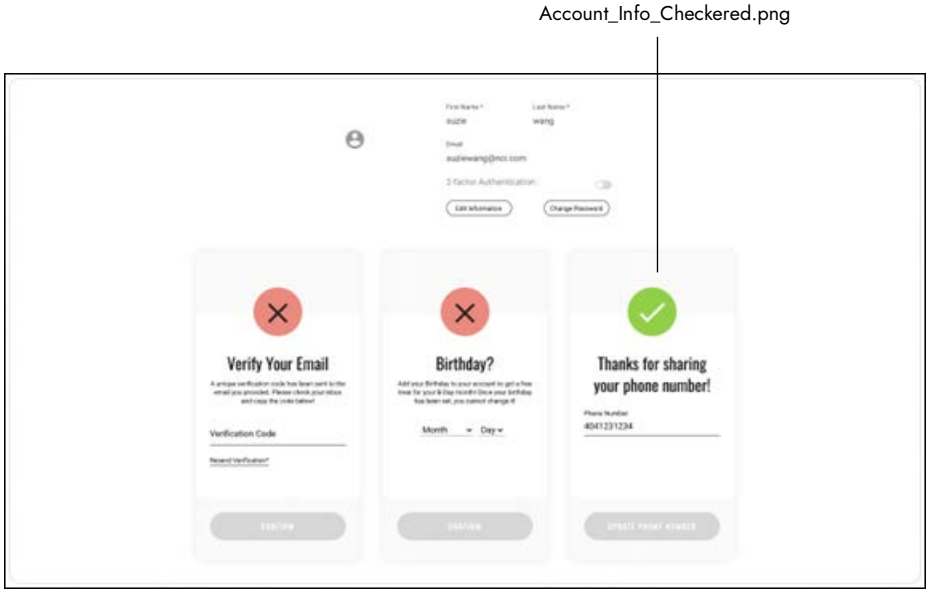

Figure 47 Account_Info_Checkered.png Image on Website

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Available reward icon image on website

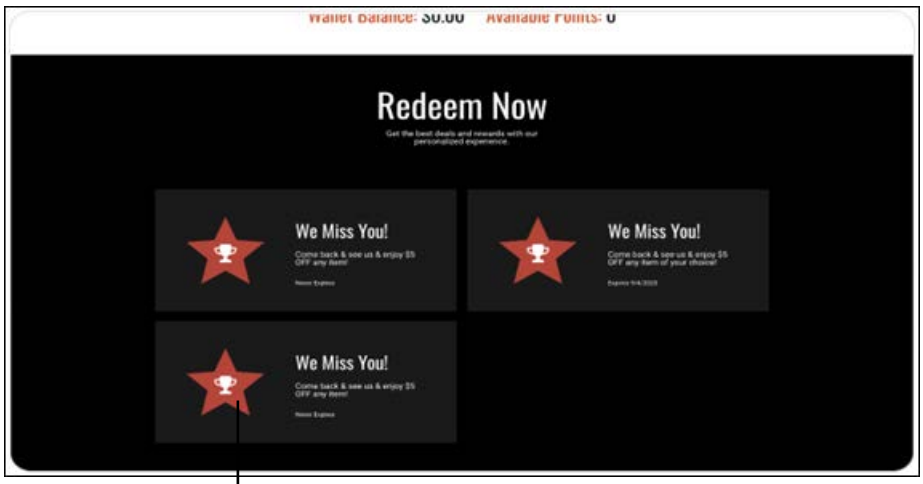

Figure 48 AvailableRewardIcon.png Image on Website

Apple store badge and Google Play badge images on website

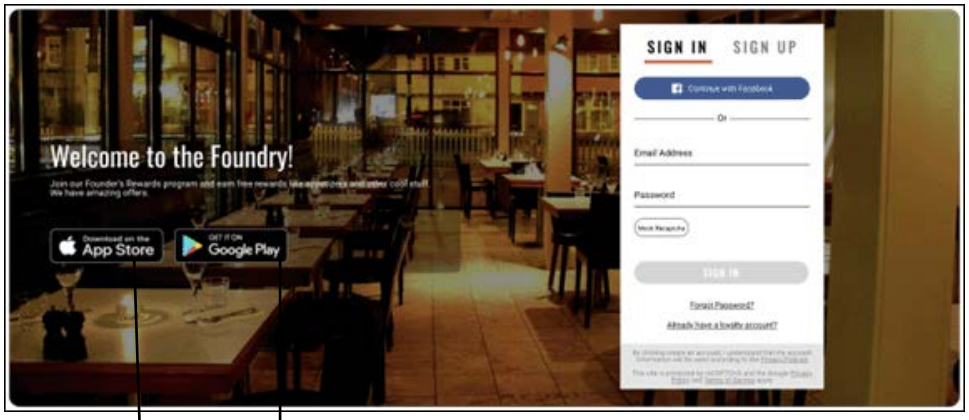

Figure 49 Apple_Store_Badge.png and Google_Play_Badge.png Images on Website

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Configuring site fonts

Click Studio > Fonts in the navigation pane to access the Fonts Editor function and customize the font to use for the website. This allows you to enhance readability and brand the restaurant with any custom fonts. When you change a font, the change appears immediately on the website. You can customize the following:

- Headers, buttons, and card files.
- Body text and captions.

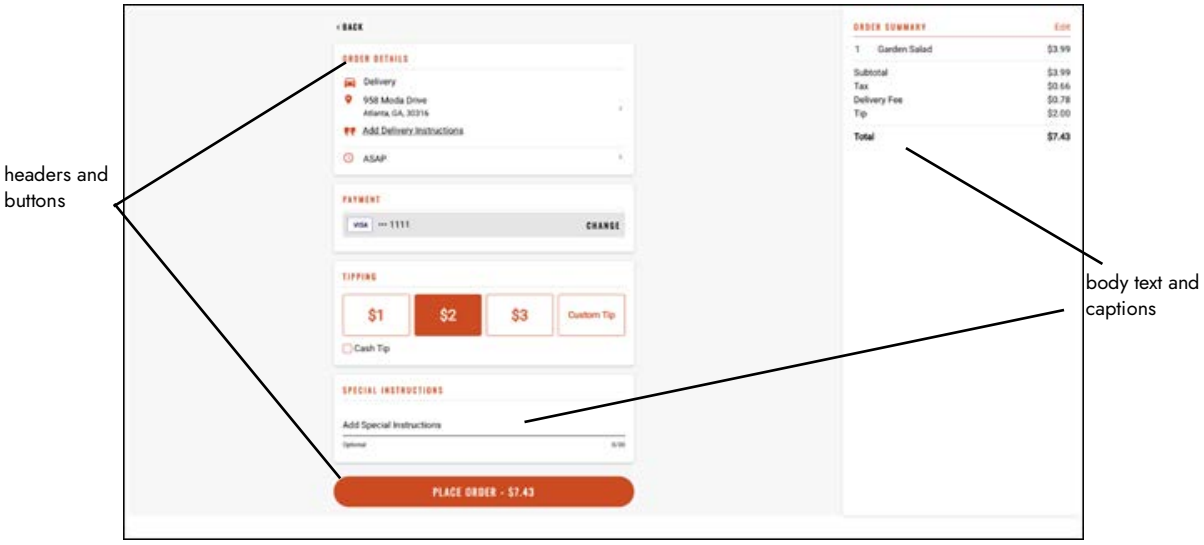

Figure 50 Fonts on a Website

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To configure a font to use on a website:

1. Click **Studio > Fonts** in the navigation pane to open the Font Editor function.

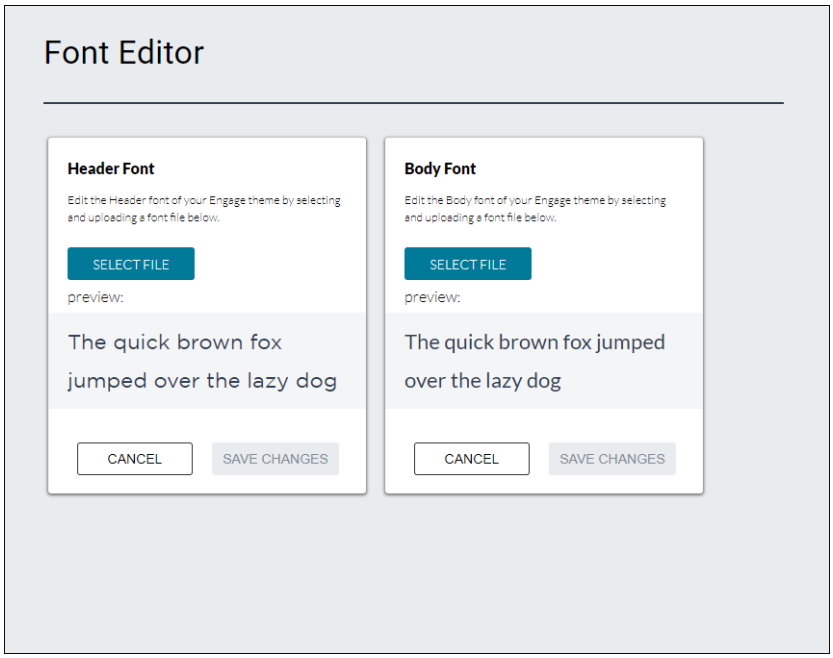

Figure 51 Font Editor Function

2. To configure the font to use for **headers, buttons, and card files**:
   a. Select the **Header Font** tile.
   b. Click **SELECT FILE**. A file explorer window opens.
   c. Click **Browse**, locate the **font** to use for all headers, and click **Open**.
   d. Review the **sample text** in the Font Preview window to confirm you want to use that font.
   e. Select **SAVE CHANGES**.
   f. To configure the font to use for **body text and captions**:
   g. Select the **Body Font** tile.
   h. Click **SELECT FILE**. A file explorer window opens.
   i. Click **Browse**, locate the **font** to use for all body text, and click **Open**.
   j. Review the **sample text** in the Font Preview window to confirm you want to use that font.
3. Click **SAVE CHANGES**.

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Configuring site email template

Click Studio > Email Templates in the navigation pane to access the Email Template function and customize the templates used to send emails to consumers. Currently, there are two email templates you can customize using an HTML editor. You can directly edit the text for your branding as well as insert images.

Welcome Email Template - Sent to consumers when they create an account within Digital Ordering.

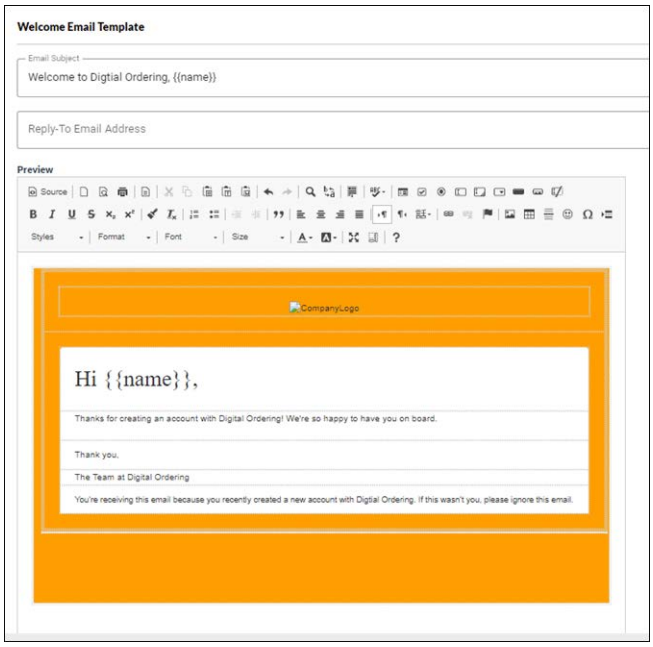

Figure 52 Welcome Email Template

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Verification Email Template - Sent to consumers when you have 'two factor authentication' enabled. This email has the verification code for the consumer to use when they create an account or change information within their account profile for existing accounts.

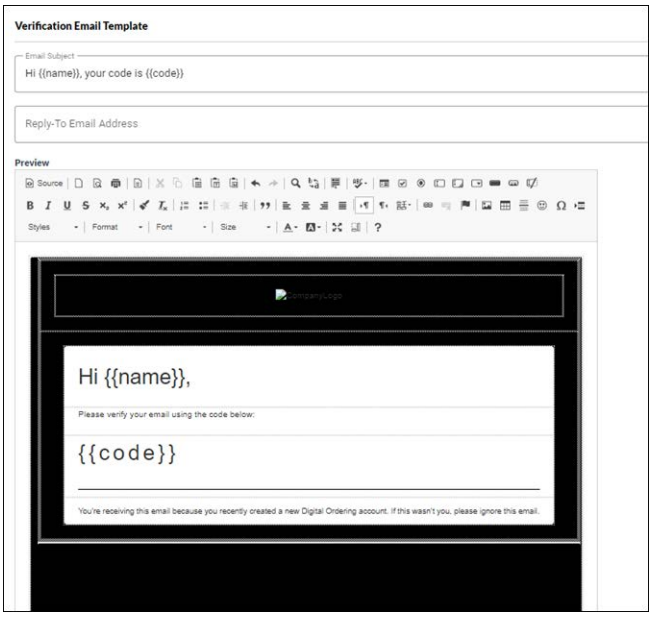

Figure 53 Verification Email Template

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Configuring site text and previewing the user experience

Click Studio > Live Editor in the navigation pane to access the Live Editor function and edit any text on the website. For example, you can change the text for ORDER ONLINE to ONLINE MENU. You can also use the Live Editor function to preview the user experience and order flow of your online menu, even tendering the order, without actually placing an ordering. To initiate the preview, select an order mode and navigate through the screens.

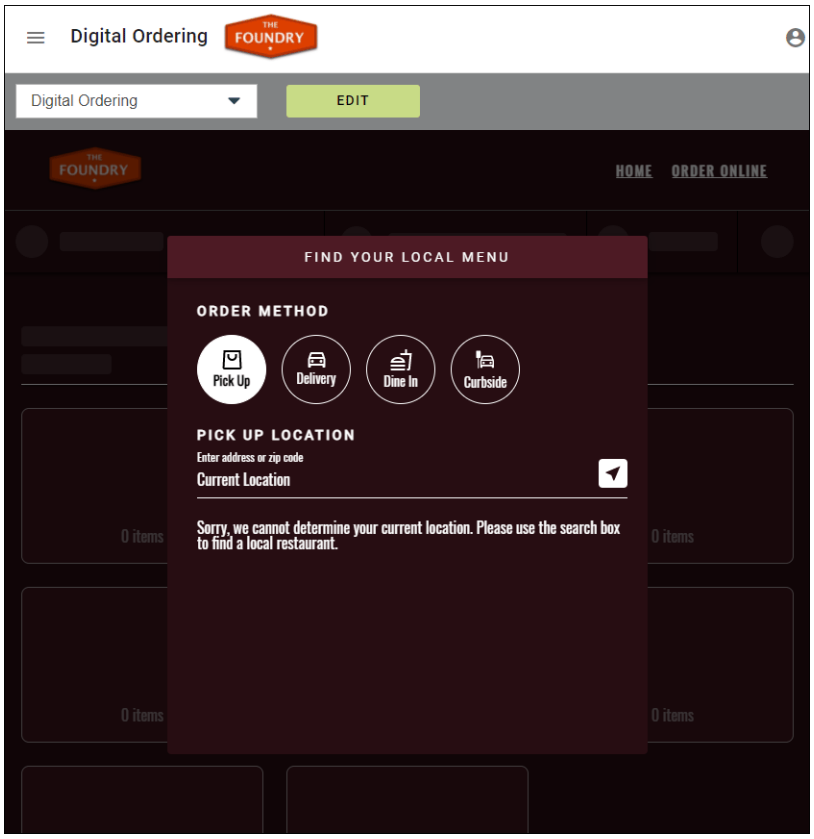

Figure 54 Live Editor Function

To edit the text on the website:

1. Click **Studio > Live Editor** in the navigation pane to access the Live Editor function.
2. Select **Digital Ordering** or **Loyalty** from the drop-down list at the top of the function. Digital Ordering displays the ordering flow of the Digital Ordering website and Loyalty displays the ordering flow for signing up for Loyalty.
3. Click **Edit** from the top of the screen. The screen changes to include blocks of text elements for which you can change the text. **Note:** You may need to navigate through the screens to locate the block of text you want to change.
4. Hover over the **block of text** to change until Edit appears.
5. Click **Edit** that appears over the block of text.

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6. Type the **text** to appear on the screen.
7. Click **PUBLISH** at the top right of the screen to publish your changes or click **CANCEL** at the top left of the screen to cancel your changes. If you do not publish or navigate away from the Live Editor function, the Unpublished Changes message appears asking if you want to return to the Live Editor function, discard your changes, or publish your changes.

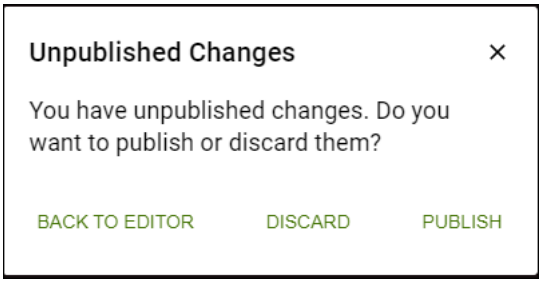

Figure 55 Unpublished Changes Message

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Configuring a marker item for online orders

Digital Ordering uses the Aloha Online (AO) API to communicate between the digital Web Services and other services, such as Enterprise Loyalty. During order submission, a duplicate of the order is sent to these services; however; it is not needed for recording.

We strongly recommend you configure a hidden marker item that is sent to the Aloha POS system with every online order submission. When the hidden marker item is detected by Aloha Transaction Gateway (ATG), the duplicate order is ignored by the system and only one order is recorded. Without the presence of the hidden marker item, the system records a duplicate of the same order for the site.

To configure a hidden marker file for online orders, do the following:

- Create a hidden marker item in the Aloha POS system.
- Add the POS hidden marker item to an online menu in Menu Configurator.
- Add the AddOnlineOrderItemId company setting in Web Admin.

Creating a hidden marker item in the Aloha POS system

The first step to configuring a hidden marker item for online orders is to create a POS item specifically for the marker.

1. Log in to **Aloha Configuration Center** (CFC) or **Aloha Manager** (AM).
2. Select **Maintenance > Menu > Items**.
3. Click the **New** drop-down arrow, select **General**, and click **OK**.
4. Type a **name** for the item, such as 'AO Marker.'
5. Leave all remaining **options** as their default.
6. Click **Save** and exit the **Items** function.

Adding the POS hidden marker item to an online menu

Once created, add the POS hidden marker item to a submenu on the online menu in Menu Configurator. Use a new dedicated submenu specifically for the POS marker item and set the visibility of the submenu to False.

1. Log in to **Web Admin**.
2. Select **Menu Configurator > Download Menu Configurator** to launch the Menu Configurator application.

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3. Once you launch Menu Configurator, check out a **menu design** and note the **Menu ID** in the properties window.

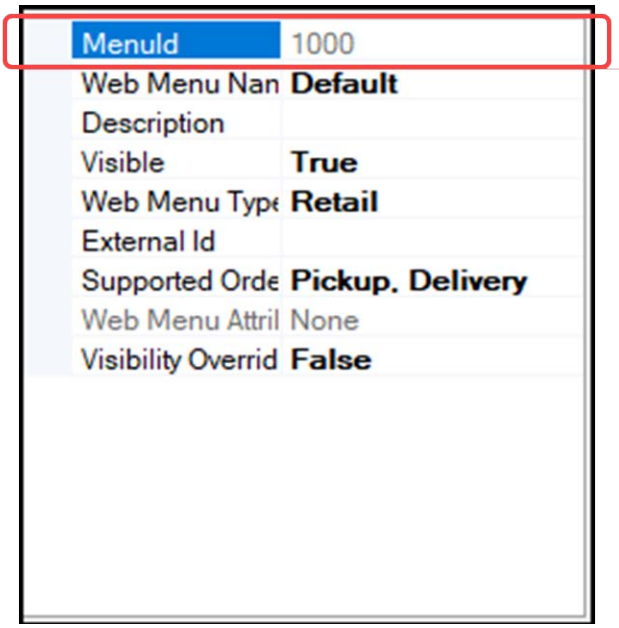

Figure 56 Menu Properties Window

4. Right-click the **menu name** in the tree to the left side of the screen and select **Create New Submenu** from the menu that appears.

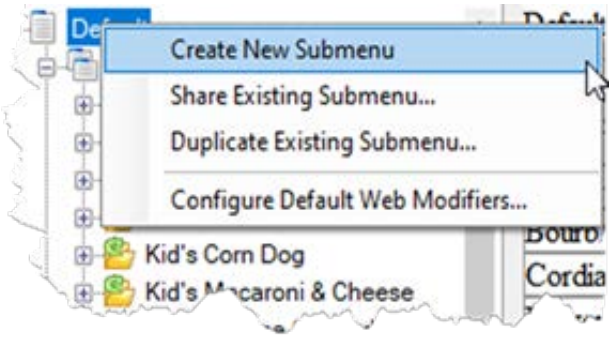

Figure 57 Menu Flyout Window

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5. In the properties window, type a **name** for the submenu, such as 'AO Marker.'

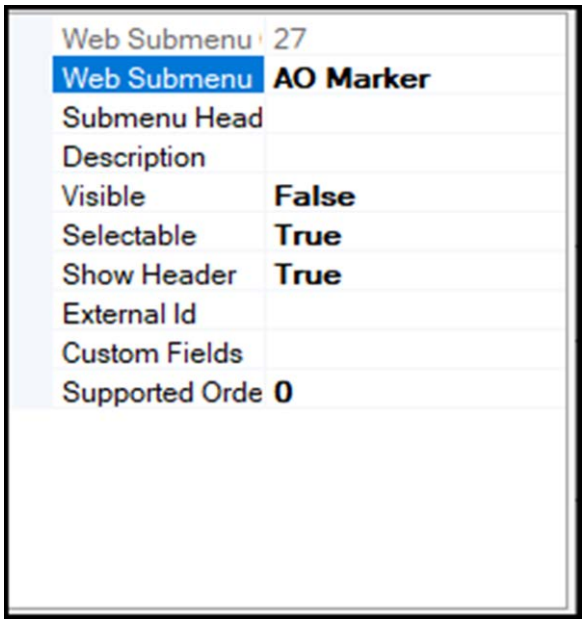

Figure 58 Submenu Properties Window

6. Select **False** from the 'Visible' drop-down list.
7. Right-click the **submenu name** in the tree on the left side of the screen, and select **Create New Web Menu Items** from the menu that appears.

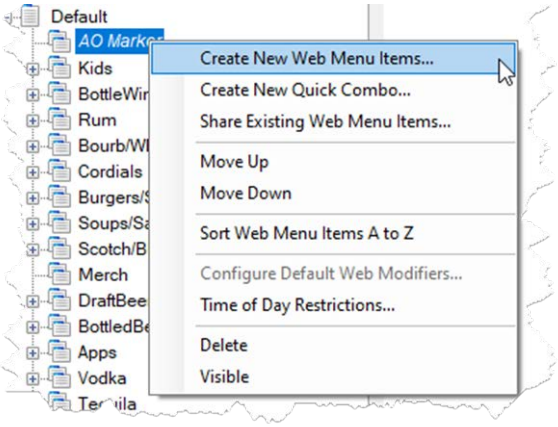

Figure 59 Submenu Flyout Window

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The Create New Web Menu Items dialog box appears.

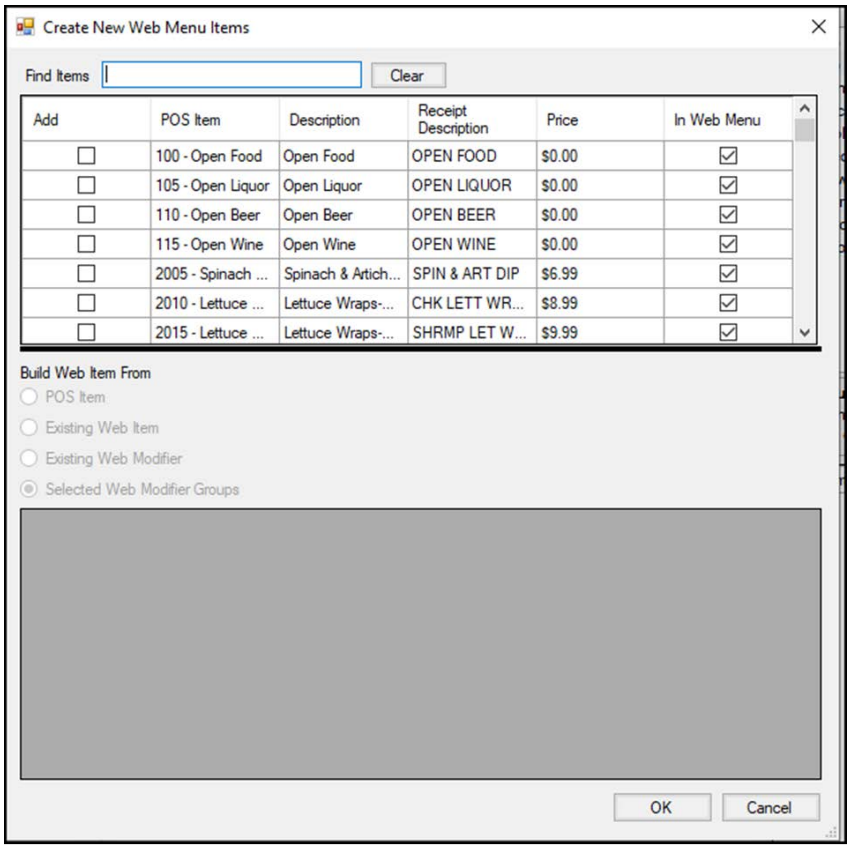

Figure 60 Create New Web Menu Items Dialog Box

8. Click **Add** next to the POS marker item and click **OK**.

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9. In the properties window, note the **POS Item ID** and **Web Item ID**.

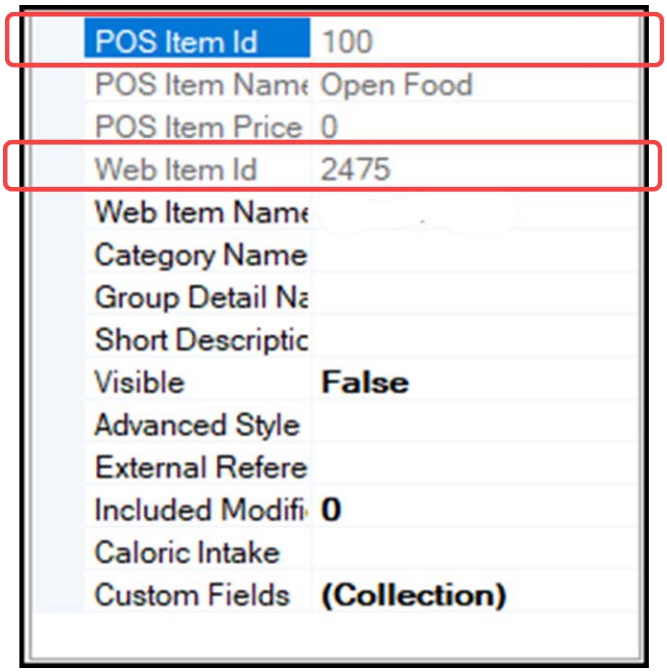

Figure 61 Web Menu Properties Window

10. Select **File > Publish** and exit **Menu Configurator**.

Adding the AddOnlineOrderItemId company setting

The final step is to add the AddOnlineOrderItemId company setting with the menu ID, POS item ID, and sales item (web menu) ID you noted.

1. Log in to **Web Admin**.
2. Select **Configuration > Company Settings Setup**.
3. Select a **set** from the 'Choose Settings Set' drop-down list.
4. Click **Add Setting**.

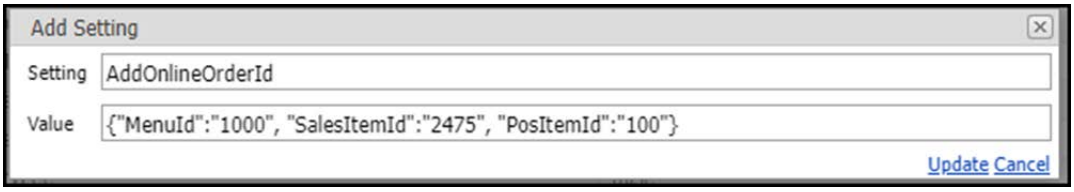

Figure 62 AddOnlineOrderId Company Setting

5. Type **AddOnlineOrderItemId** in 'Setting.'

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6. Type the **menu ID**, the **sales item ID**, and the **POS item ID**, separated by commas and enclosed by braces, in 'Value.' Use quotation marks and colons as shown in the above example for POS item ID 100, which is defined as sales item ID 2475 within the menu ID 1000 in Menu Configurator.
7. Click **Update** and exit the **Company Settings Setup** function.

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Configuring deep linking

Deep linking is the use of a hyperlink to take a consumer to a specific page on a website other than the home page. For example, in Digital Ordering, you can insert a link in an email to take the consumer straight to a promotion at a specific site, bypassing the prompts to search for a site and select an order mode.

Note
Be aware you cannot insert a deep link into a system-generated email that Digital Ordering sends. You insert a deep link only in correspondence manually generated between the site and consumers.

For a more advanced deep link solution, a site could insert a deep link within a widget or object located on their custom online ordering website to route the consumer to a specific order mode selection. Please contact the Digital Ordering Implementation team for more information on this solution.

Figure 63 Deep Link on a Custom Website

Obtaining the ID for a site and an order mode

The first step to configuring a deep link is to obtain the site ID or order mode ID to which to route the consumer. You then convert the value to Base64 format in the next step. Obtain the site ID in Site Settings > Sites function in the Digital Ordering portal. This is also found in Configuration > Site Setup > Sites in Web Admin.

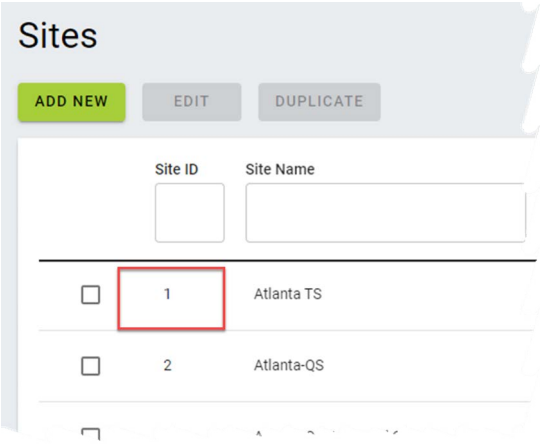

Figure 64 Site Settings > Sites Function

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To obtain the order mode ID to include in the deep link, refer to the following table:

ID number	Order Mode
1	Pickup
2	Delivery (Be aware the system selects the closest location for delivery when the customer enters their address, regardless if the site specified in the deep link is closer.)
4	Curbside
128	All order modes

Converting values to Base64 format

In this step, you convert the ID to a Base64 format value, which is required for deep linking. Several conversion tools are available online. For your convenience, we include the more common encoded Base64 formats you may use. If you need to convert one that is not listed, visit https://www.base64decode.org or another encoding website.

Value	Base64 Format	Value	Base64 Format
1	MQ==	11	MTE=
2	Mg==	12	MTI=
3	Mw==	13	MTM=
4	NA==	14	MTQ=
5	NQ==	15	MTU=
6	Ng==	16	MTY=
7	Nw==	17	MTc=
8	OA==	18	MTg=
9	OQ==	19	MTk=
10	MTA=	128	MTI4

To convert values to Base64 format, using Base64Decode.org:

1. Access **Base64Decode.org**.
2. Select **Encode** at the top of the screen. This disables the 'Decode' option.

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3. Keep all **remaining options** as their default.

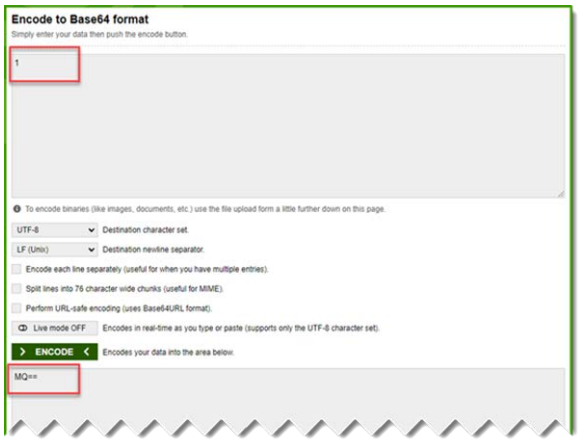

Figure 65 Base64Decode.org

4. Type or paste the **value** in the upper text box.
5. Click **ENCODE**. The value appears converted to Base64 format in the lower text box.
6. Repeat the **procedure** again for each value to be converted to Base64 format.
7. Exit the **website** when finished.

Building the deep link

The format of the deep link consists of the **1)** customer ordering URL, followed by **2)** /DirectLink **3)** /<siteID>/<ordermode>, as shown in the following example:

https://digitalordering.alohaorderonline.com/Engage.aspx?#/engage/ordering/DirectLink/MQ==/NA==

1. The customer ordering URL varies and is the same URL the site uses to send emails to the consumer.
2. The '/DirectLink/' syntax is always present in the deep link.
3. The 'SiteID' and 'OrderMode' syntax must be in a Base64 format, as explained earlier. In accordance to the online ordering flow, we recommend adding 'SiteID' before 'OrderMode.'

When the site creates the email, include the deep link so the consumer is routed to the proper place on the website ensuring a succinct and friendly ordering experience. In the example provided, when the consumer clicks the deep link, they are routed to site ID 1 and are ready to enter a curbside order.

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Configuring single site flow

In a normal multi-site company setup, consumers search for a site location to access the site menu and begin ordering. If the company has only one site, enabling the Single Site Flow feature bypasses the prompt to choose a location and consumers can start their order at the order mode selection screen.

To enable single site flow:

1. Log in to **Web Admin**.
2. Select **Configuration > Company Settings Setup**.
3. Begin typing **EnableSingleSiteFlow** until the option filters in the list.
4. Click **Edit Setting**.

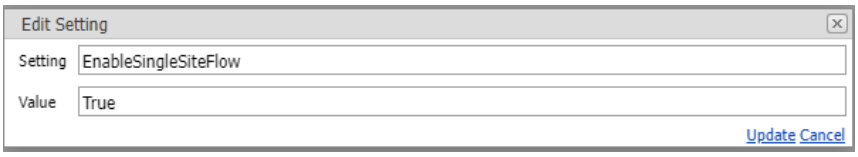

Figure 66 EnableSingleSiteFlow Company Setting

5. Type **True** in 'Value.'
6. Click **Update** to save the setting and return to the Company Settings Setup.
7. Click **Add Setting**.

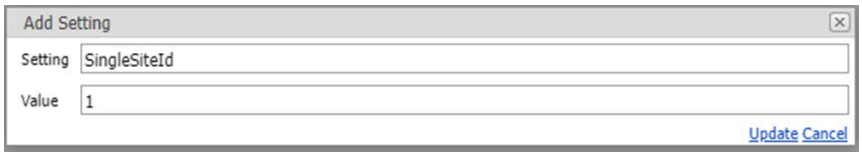

Figure 67 SingleSiteId Company Setting

8. Type **SingleSiteId** in 'Setting.'
9. Type the **ID** of the site to use the Single Site Flow feature.
10. Click **Update** and exit the **Company Settings Setup** function.

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Configuring upselling

You can configure Digital Ordering to prompt a consumer to purchase additional or related items through upselling. For example, you may want to promote a dessert with each dinner or a soup with each sandwich. This promotes suggestive selling and ultimately increases the total of the guest check. When a consumer adds an applicable item to the cart, the upsell items appear in the cart, based on the items already entered on the check.

Things to consider with the upsell feature:

- You must include upsell items that are already available on a submenu and accessible to the consumer.
- If the upsell item requires modification, Digital Ordering opens the page for the item to allow the consumer to add required, optional, and recipe modifiers.
- If one of the items configured as an upsell item already exists on the check, that item does not appear for upselling.
- The prompt to upsell an item appears to the consumer only at the time they add the trigger item to the check. If the consumer later decides to order the upsell item, they must navigate back through the menu to add the item to the check.

Creating a group of upsell items

You must configure a group of items to offer as an upsell. Mark each item available as an upsell item as 'Selected' in Each item available as an upsell item ordered as an upsell appears marked as 'selected' appears in the cart when an existing item prompt for the upsell. You can create as many groups as necessary.

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To configure a group of upsell items:

1. Log in to **Web Admin**.
2. Select **Designs > Upsell Configuration > Sales Item Group Setup**.

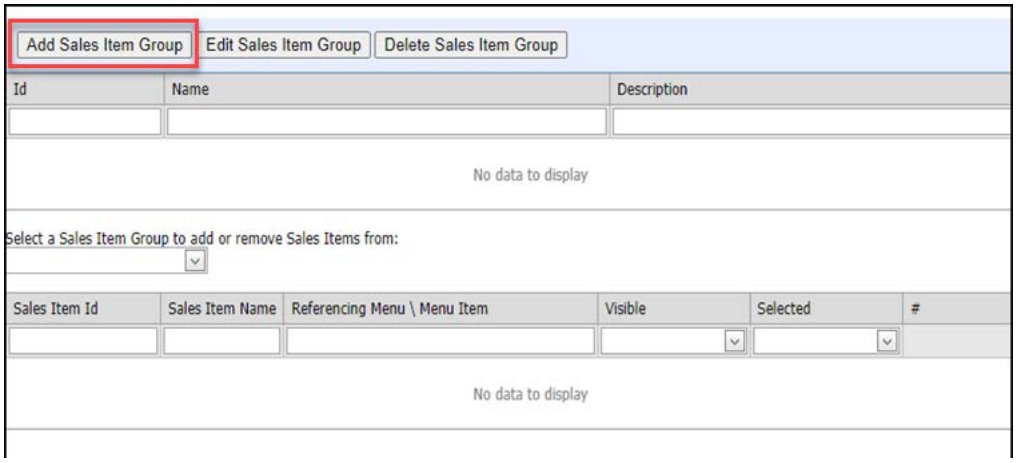

Figure 68 Sales Item Group Setup Function

3. Click **Add Sales Item Group**. The Add Sales Item Group dialog box appears.

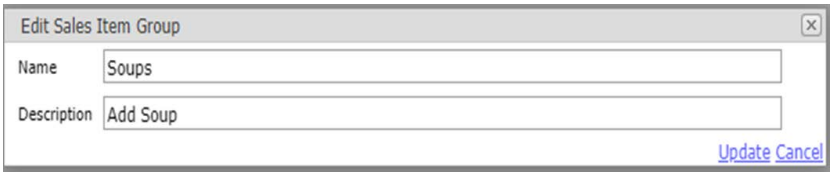

Figure 69 Add Sales Item Group

4. Type a **name** for the upsell group.
5. Type a **description** for the upsell group.
6. Click **Update**.

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7. Select the **sales item group** you created from the 'Select a Sales Item Group to add or remove Sales Items from' drop-down list.

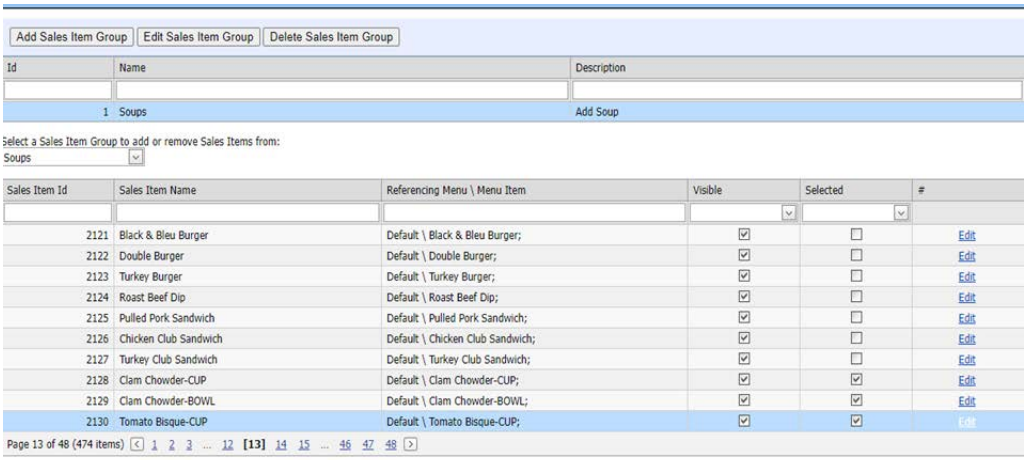

Figure 70 Upsell Configuration - Sales Item Group Setup

8. Scroll through the **list of pages** and select a **sales item** to include in the sales item group.
9. Click **Edit** in the last column to make the item available for selection in your sales item group.
10. Click **Selected**.
11. Click **Update** to exit edit mode for the item.
12. Repeat **steps 8 through 11** for each additional item to include in the sales item group.
13. Exit the **Sales Item Group Setup** function.

Configuring the upsell suggestion

The configuration for the upsell suggestion is required; however, Digital Ordering overrides the text entered for the suggestion, and uses 'PEOPLE ALSO ORDERED.'

Tip

Many options in the Upsell Suggestion Setup function only apply to Aloha Online Ordering and do not apply to Digital Ordering.

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To configure an upsell suggestion:

1. Select **Designs > Upsell Configuration > Upsell Suggestion Setup**.

Figure 71 Upsell Suggestion Setup Function

2. Click **Add Suggestion**. The Add Upsell Suggestion screen appears.

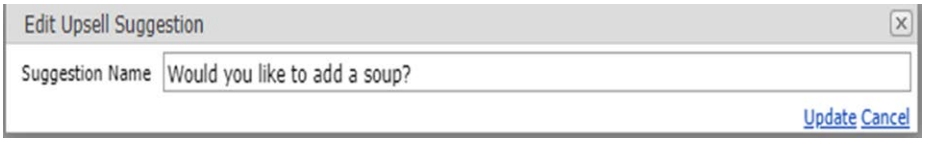

Figure 72 Add Upsell Suggestion Screen

3. Type the **text** for the upsell suggestion. The text for the suggestion is not used with Digital Ordering; however, it is needed in the next procedure.
4. Click **Update**.

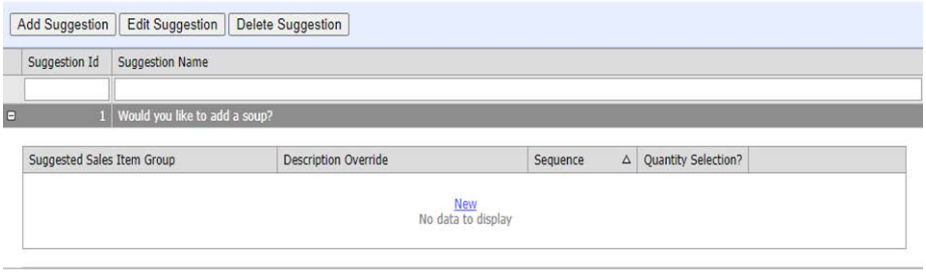

Figure 73 Upsell Suggestion Setup Function

5. Click the **+ icon** to the left of the suggestion name.
6. Click **New** in the middle of the screen.
7. Select the **sales item group** you created from the 'Suggested Sales Item Group' drop-down list.
8. Leave **Override Description**, **Sequence**, and **Quantity Selection** as the defaults, as they are not supported for Digital Ordering. The consumer can adjust the quantity of the upsell item once it is added to the cart.

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9. Click **Update**.

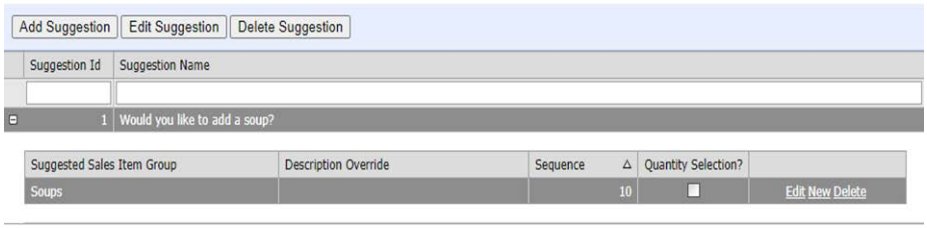

Figure 74 Adding Sales Item Groups to Upsell Suggestion

10. If you have additional sales item groups to associate with the upsell suggestion, click **New** in the last column, and repeat **steps 7 through 9**.
11. Exit the **Upsell Suggestion Setup** function.

Assigning items to trigger the prompt for upselling

After you create a group of upsell items and the upsell suggestion, then assign the items to trigger the prompt for upselling. When an assigned item appears on the check, and the consumer adds it to the cart, the associated upsell items appear.

To assign items to trigger the prompt for upselling:

1. Select **Designs > Upsell Configuration > Upsell Suggestion Assignment**.

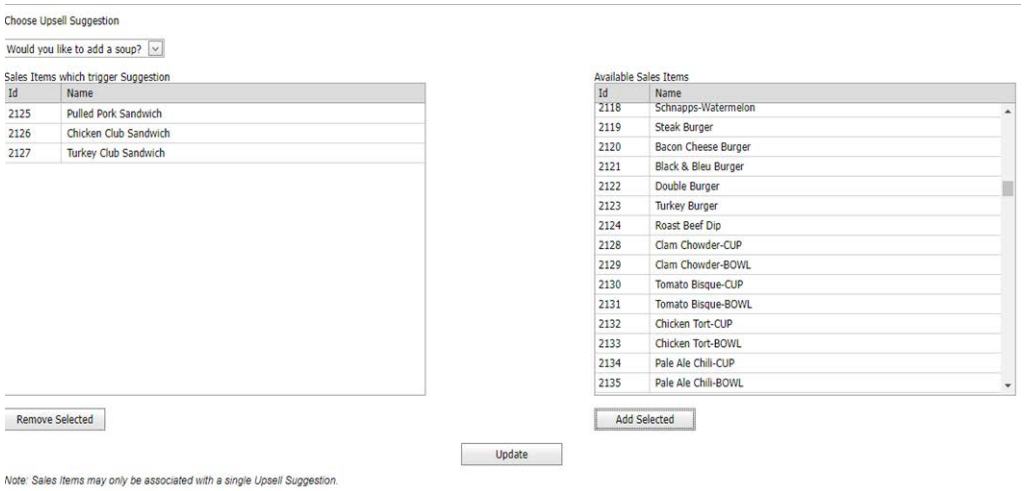

Figure 75 Upsell Suggestion Assignment Function

2. Select the **upsell suggestion** from the 'Choose Upsell Suggestion' drop-down list.
3. Select the **item** from 'Available Sales Items' and click **Add Selected** to move the item to 'Sales Items which trigger Suggestion.'

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To select multiple items, hold down **Ctrl** and select each **item**.

To remove an item select the **item** from 'Sales Items which trigger Suggestion' and click **Remove Selected** to move the item to 'Available Sales Items.'

4. Click **Update**.

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Managing portal members

Use the Custom Roles and Members functions to control access to different areas in the portal within the portal.

Creating roles for portal access

Click Admins > Custom Roles in the navigation pane to add roles for access to the Digital Ordering portal. Use this function to create any custom roles besides the ones pre-populated in the portal. For example, you can create a specific role for a lower manager at the site.

To create a role for access to the Digital Ordering portal:

1. Click **Admins > Custom Roles** in the navigation pane.
2. Click **Add New**.

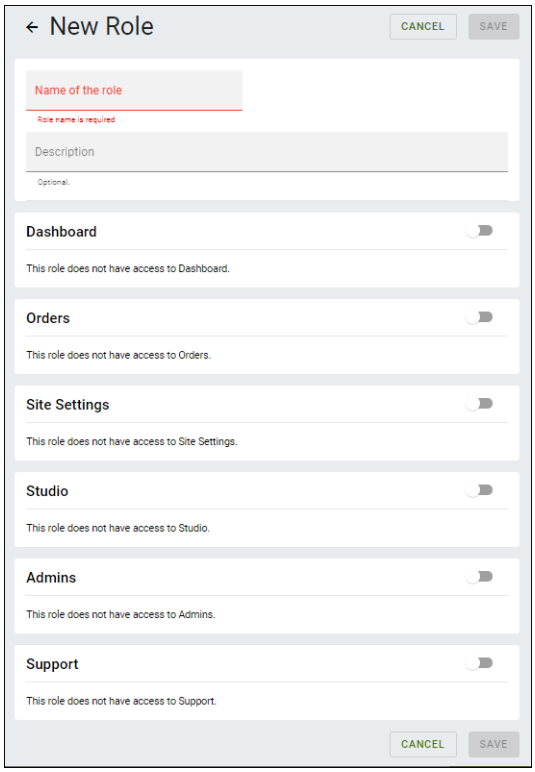

Figure 76 New Role Function

3. Type a **name** for the role.
4. Type a **description** for the role.
5. Slide the **following** to the right to allow the user role to access the function:
   - Orders
   - Site Settings

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- Studio
- Admins
- Support

6. Click **SAVE** to save your settings or click **CANCEL** to cancel the record.

Creating members for portal access

Click Admins > Members in the navigation pane to access the Members function and view, add, or edit members for the Digital Ordering portal.

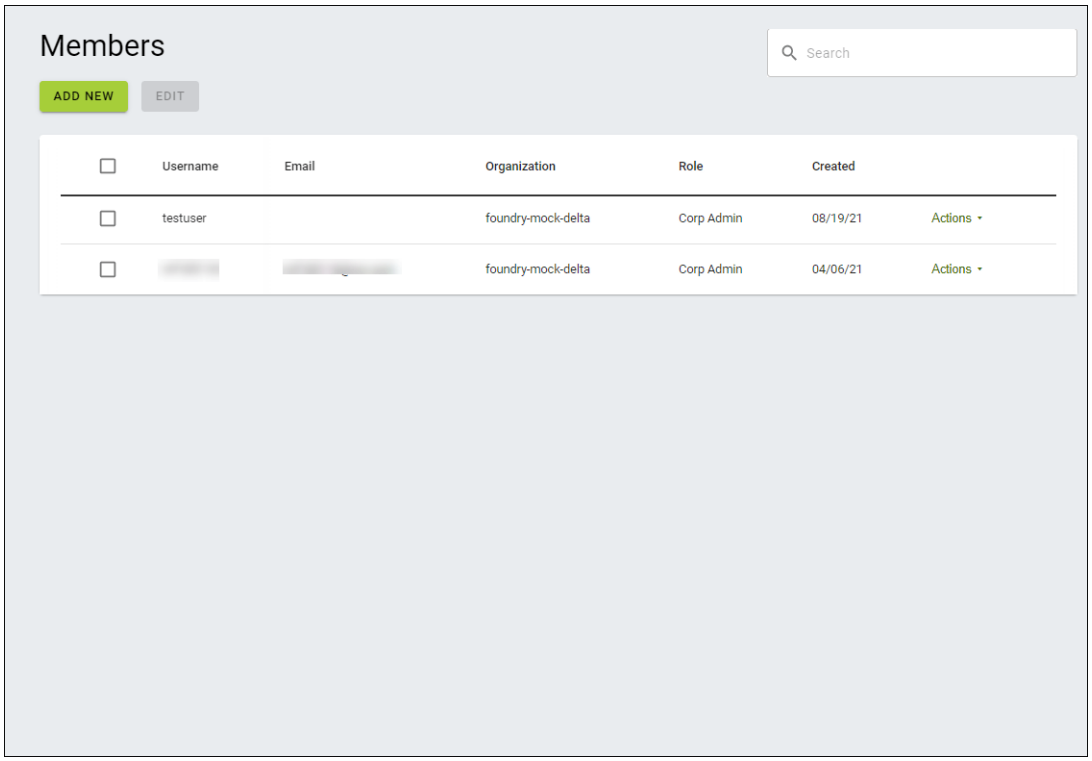

Figure 77 Members Function

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To add a member:

1. Click **Admins > Members** in the navigation pane to access the Members function.
2. Click **Add New**. The New Member function appears.

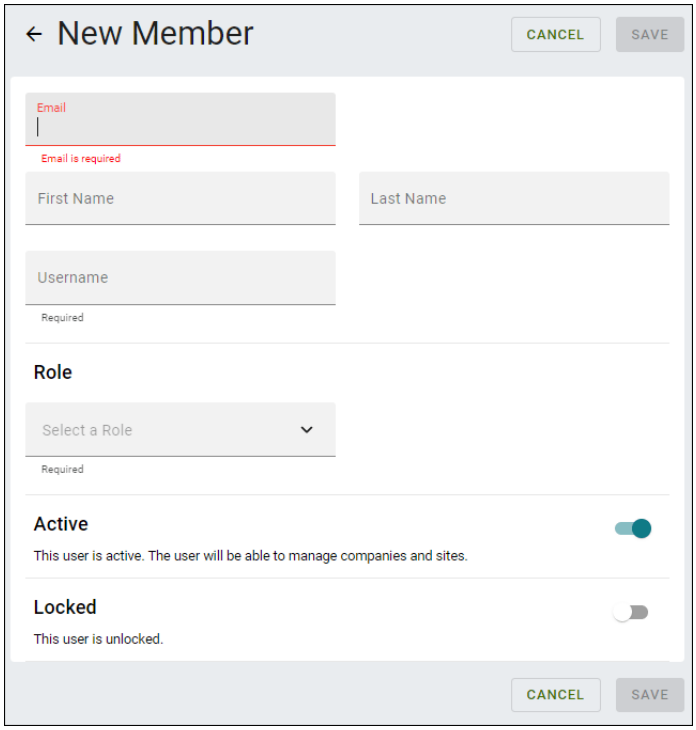

Figure 78 New Member Function

3. Type the **email address** associated with the member.
4. Type the **first** and **last name** of the member.
5. Select a **username** for the member to use in the Digital Ordering portal.
6. Select the **user role** from the 'Role' drop-down list to assign to the member. See "Creating roles for portal access" on page 72 to create a custom role for a specific portal user.
7. Slide **Active** to the right to indicate the member is active and can manage companies and sites; otherwise, leave it disabled.
8. Slide **Locked** to the right to indicate the member is able to access the portal; otherwise, leave it disabled.
9. Click **SAVE** to save your settings or click **CANCEL** to cancel the record.

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Using the Digital Ordering portal

We discuss the following topics for using the Digital Ordering portal:

- Reviewing site orders.
- Switching to another company.
- Generating dine-in QR codes.
- Controlling site browsability.
- Controlling online order acceptance.
- Viewing audit logs.

Reviewing site orders

Click Orders in the navigation pane to access the Order Review function and review all orders that consumers place through your off-premise channels. Currently, you can search by phone number or email address to locate a specific order. You can also drill down to a specific order to view additional details and the consumer who placed the order.

Note
The information in the Review Orders pane is the same as in the Review function in Web Admin.

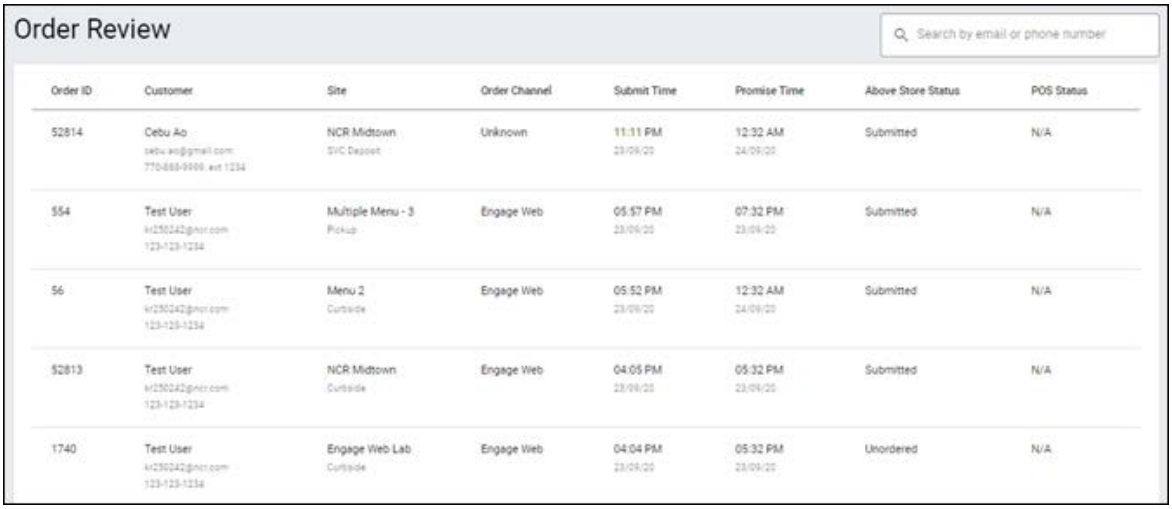

Figure 79 Order Review Function

To review an order for a site:

1. Click **Orders** in the navigation pane to open the Order Review function.
2. Select an **order** from the list. A flyout window appears from the right side.

   -OR-

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Type the **phone number** or **email address** in the 'search' box to search for an order.

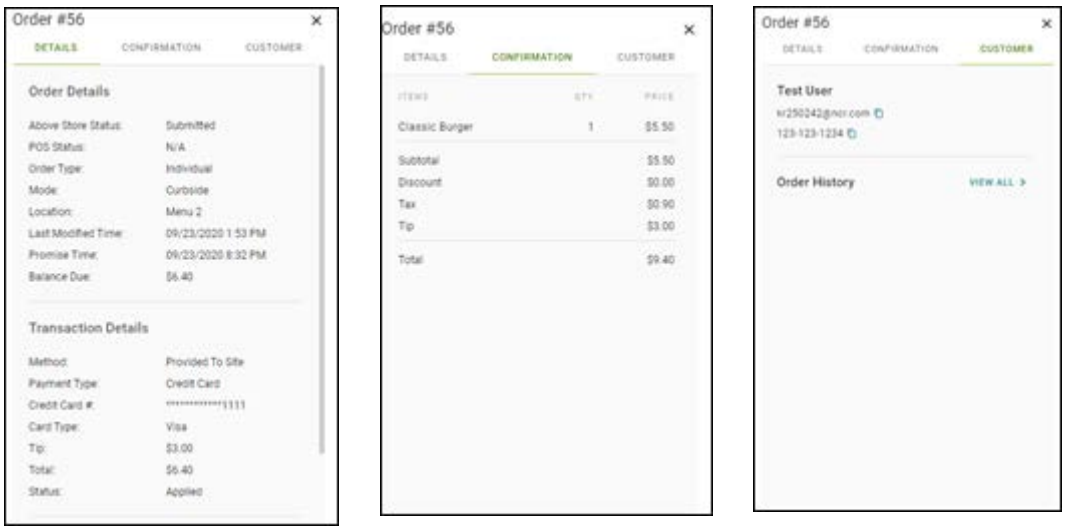

Figure 80 Order Review Tabs

3. Click the **DETAILS** tab to view how the order was placed, paid, and the status, the **CONFIRMATION** tab to view the contents and pricing of the order, and the **CUSTOMER** tab to view the name, email, phone number, and loyalty information of the consumer.
4. Click the **X** located in the top right corner or **VIEW ALL** located in the CUSTOMER tab to return to the list of orders.

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Switching to another company

A site administrator can easily switch between companies within the organization by selecting the name of the organization in the top left corner, while within the Digital Ordering portal.

To switch to another company:

1. In the Digital Ordering portal, select the **name** of the organization on the left side of the screen. The Switch Company screen appears.

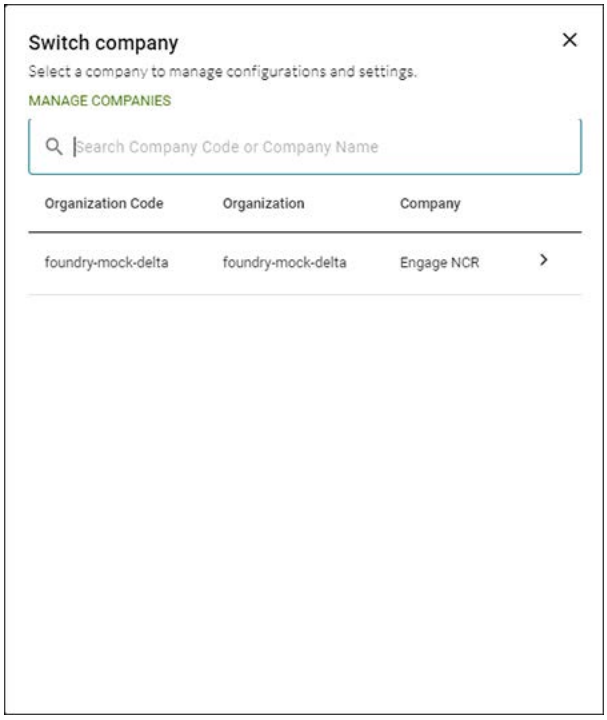

Figure 81 Switch Company Screen

2. Begin typing the **name** of the company to switch to in the 'MANAGE COMPANIES' search box.
3. Select the **company** from the list. The company appears in the Digital Ordering portal.

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Generating dine-in QR codes

When using the Contactless Dine-In feature, each table has a unique embedded QR code. The code includes the table number, the order status of ASAP, the dine-in order mode, and a web link to the menu landing screen.The system generates a PDF of QR codes for a range of tables, which you can print and use for signage on the table.

Figure 82 Sample QR Code

Reference

Refer to the Contactless Dine-in Feature Focus Guide - HKS1485 for more information on generating dine-in QR codes for the Contactless Dine-in feature.

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Controlling site browsability

You can enable and disable the ability for consumers to browse and select sites. Controlling site browsability in the Digital Ordering portal and the Sites function in Web Admin are synchronous, meaning if you set it in the portal, it automatically changes in Web Admin.

To allow site browsability:

1. Click **Site Settings > Sites** in the navigation pane to access the Sites function.

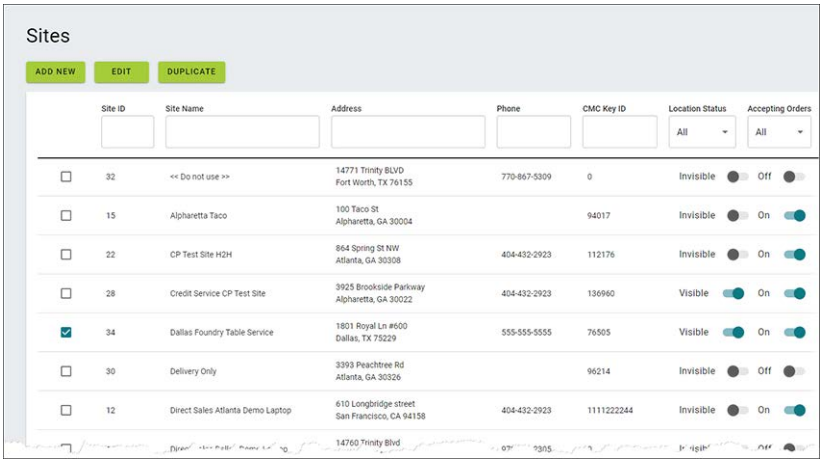

Figure 83 Sites Function

2. Select a **site** from the list.

   -OR-

   Type the **location** of the site in the 'Search' box.
3. Slide **Location Status** to the right to allow site browsability. A confirmation appears.

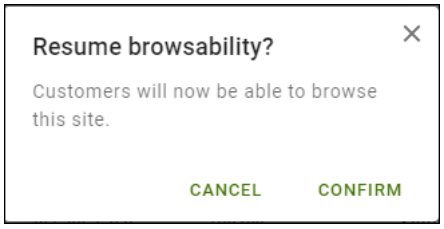

Figure 84 Resume Browsability Confirmation

4. Click **CONFIRM** to allow site browsability or click **CANCEL** to cancel the operation.

To disable site browsability:

1. Click **Site Settings > Sites** in the navigation pane to access the Sites function.
2. Select a **site** from the list.

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-OR-

Type the **location** of the site in the 'Search' box.

3. Slide **Location Status** to left to prevent site browsability. A confirmation appears.

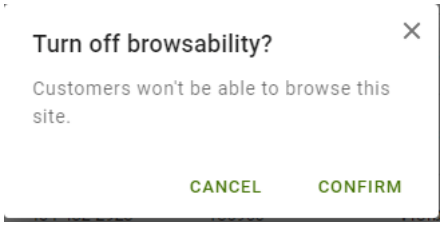

Figure 85 Browsability Confirmation

4. Click **CONFIRM** to disable site browsability or click **CANCEL** to cancel the operation.

Controlling online order acceptance

You can enable and disable the ability to accept online orders at a site in the case of an emergency or when the store is too busy to accept online orders at the time. Controlling online order acceptance in the Digital Ordering portal and the Emergency Close function in Web Admin are synchronous, meaning if you set it in the portal, it automatically changes in Web Admin.

When consumers attempt to place an order, they receive the 'Not Accepting Orders' message and they can select a different location or schedule their order at another time.

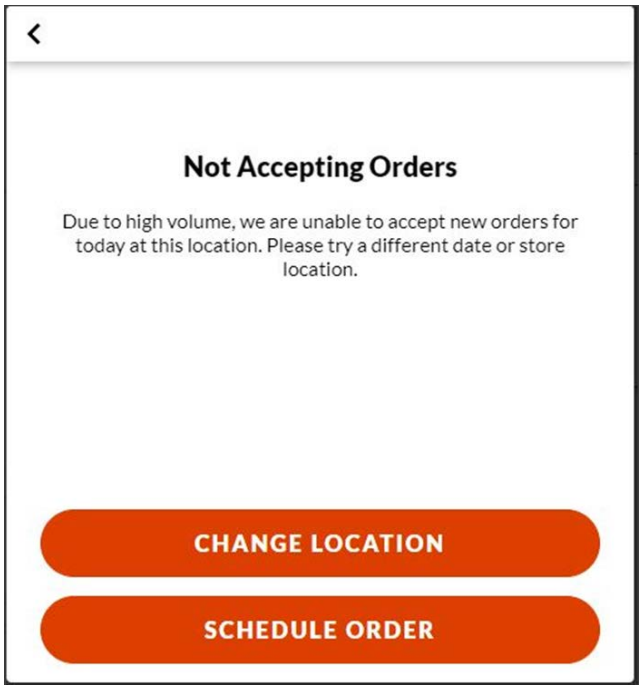

Figure 86 Not Accepting Orders Message

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To prevent a site from accepting online orders:

1. Click **Site Settings > Sites** in the navigation pane to access the Sites function.
2. Select a **site** from the list.

   -OR-

   Type the **location** of the site in the 'Search' box.
3. Slide **Emergency Closed** to the right to prevent online orders from arriving at the site. A confirmation message appears.

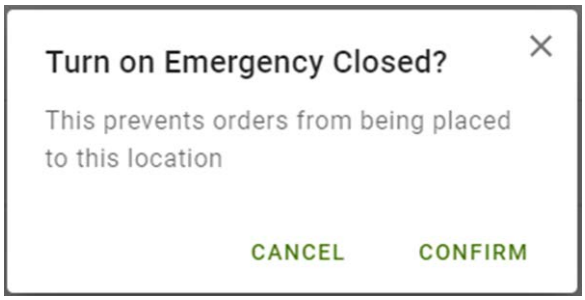

Figure 87 Turn Off Emergency Closed? Confirmation

4. Click **CONFIRM** to prevent online orders from arriving at the site or click **CANCEL** to cancel the operation.

To accept online orders at a site:

1. Click **Site Settings > Sites** in the navigation pane to access the Sites function.
2. Select a **site** from the list.

   -OR-

   Type the **location** of the site in the 'Search' box.
3. Slide **Emergency Closed** to the left to allow online orders at the site. A confirmation message appears.

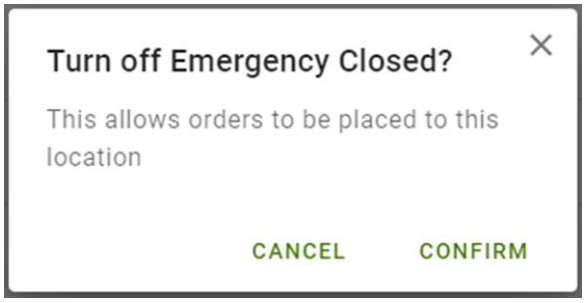

Figure 88 Turn on Emergency Closed? Confirmation

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4. Click **CONFIRM** to start allowing online orders at the site or click **CANCEL** to cancel the operation.

Viewing audit logs

Click Support > Audit Log in the navigation pane to view the actions performed by users within the Digital Ordering portal.

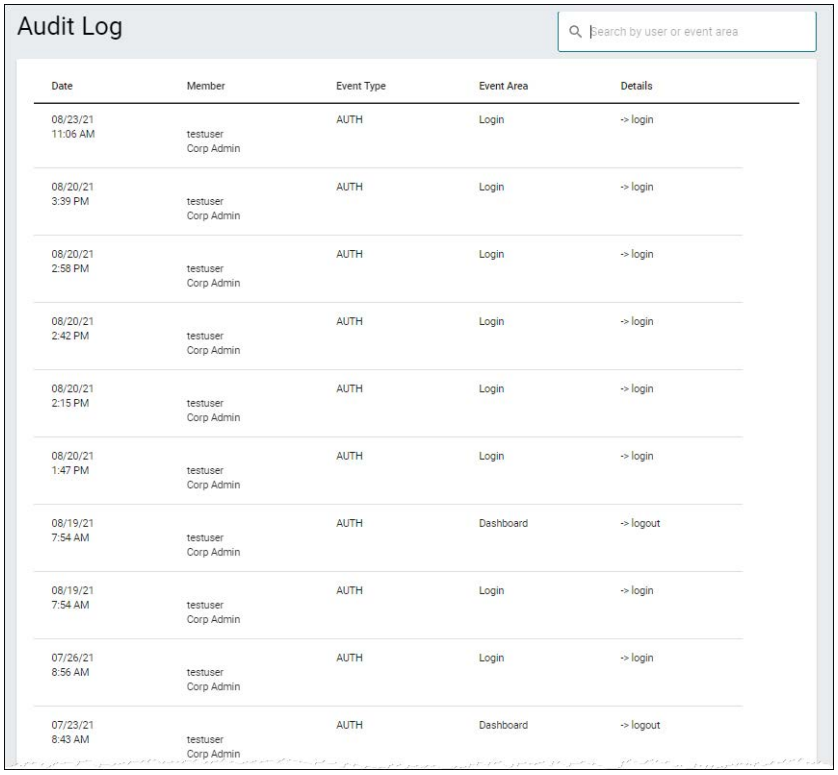

Figure 89 Audit Log Function

To view audit logs:

1. Click **Support > Audit Log** in the navigation pane.
2. Type the **member name** in the search box to filter the actions performed by the user.

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Aloha Digital Ordering, Implementation Guide

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