Integrate Aloha with Crunchtime

Setup Guide

Document Details

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Overview

The purpose of this document is to provide the information you need to integrate the Aloha POS system with the Crunchtime platform.

Download the latest version of this document here:
https://links.crunchtime.com/SG-IntegrateAlohaWithCT

… or scan the QR code to the left.

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Integrate Aloha with Crunchtime

Introduction

Aloha is a client-based NCR platform that integrates data with Crunchtime on four fronts. This integration can enable you to pull sales and time punch information from your POS into Crunchtime, as well as push Schedules from Crunchtime down to your POS system.

POS → Crunchtime:	Crunchtime → POS:
1. Sales Mix	1. Schedules
2. Menu Mix	
3. Time Clock	

Aloha HRBridge is a cloud-based NCR platform that integrates Employees with Crunchtime, allowing you to push Employee information from Crunchtime to your POS system.

Crunchtime → POS:
1. Employees

NCR Aloha Overview

As a client-based platform, this integration requires an on-premises software installation of the Crunchtime Connex Client. This will allow Connex to export data via database (.DBF) files to import into Crunchtime for reporting purposes.

First clients must confirm the grind path for their Aloha platform. The grind path is the folder destination on the computer that sales transaction data is placed in after end of day is completed. Typically, the grind path is as follows:

```
D:\BootDrv\Aloha
```

Please inform your Crunchtime Implementation team if you are using a different grind path. Grind paths may vary from store-to-store, but as a best practice we recommend that one grind path is used for all locations to facilitate location configuration and launch.

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Location Activation

To integrate a location with Connex, an activation request must be sent to the Crunchtime Support team (support@crunchtime.com) containing the following information:

- **Location Code** – The location code exactly as it appears in Enterprise Manager.
- **Location Name** – The name of the location (we recommend using the same name as it appears in Enterprise Manager).
- **Go-Live Date** – The date Connex will begin pulling data into Net-Chef.
- **Location Time Zone** – The location's time zone.
- **Job/File Types** – The type of integration that this location will be using (Sales Mix, Menu Mix, Time Clock, Schedules, Employees).
- **Observes Daylight Savings Time** (DST) – Choose either Yes or No.
- **Net-Chef URL** – The Net-Chef URL for this particular location.
- **Aloha Grind Path** – This is only needed when it varies from store-to-store.

Example Request:

- Location Code: 123ABC
- Location Name: ABC Store
- Go-Live Date: 05/14/2024
- Location Time Zone: EST
- Jobs/File Types: Sales Mix, Menu Mix, Time Clock
- Observes Daylight Savings Time: Y
- Net-Chef URL: https://crunchcafe.net-chef.com
- Aloha Grind Path: D:\BootDrv\Aloha

Once the Location has been provisioned, support will provide an authorization token for this location. The authorization token will be needed to complete the Connex installation at the location.

Tip: Each Location requires a unique activation code provided by the Support team.

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Integrate Aloha with Crunchtime

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Database Integration

Crunchtime must receive several key data points to begin building and testing your integration with Aloha. This process can be streamlined by providing your Implementation team with copies of several key database files. Use the following steps to retrieve the necessary files:

1. Choose a Location currently using Aloha as their POS system.
2. From this Location's computer, open file explorer.
3. Navigate to the *D:* Drive.
4. Open the *Grind Path* folder (typically *D:\BootDrv\Aloha*).
5. Right-click on a recent *dated sub folder*.



Note: Dated sub folders are created when the end of day runs for each business date. These folders will always be in *YYYYMMDD* format. Here is an example of a dated sub folder for April 1st 2024: *D:\BootDrv\Aloha\20240401*

6. Select *Send to*.
7. Choose *Compress (zipped) folder*. This will create a zipped folder containing the following files for the selected date:

File Name	Data Type
GNDITEM.DBF	Line items
ITM.DBF	Referential data on items
CMP.DBF	Discounts
PRO.DBF	Discounts
MOD.DBF	Modifier data
CAT.DBF	Grind categories
REV.DBF	Revenue centers
ODR.DBF	Order modes
TDR.DBF	Tender information
TAX.DBF	Tax information
PET.DBF	Paid in/out data

8. Provide the zipped folder to your Crunchtime Implementation team.

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Integrate Aloha with Crunchtime

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Requirements for Sales Mix Integration

Depending on you accounting and requirements and chart of accounts configuration, you may choose to report on sales totals in CrunchTime by using the Aloha Revenue Center, Order Mode, or Sales Category. You may instead choose to report on Net Sales Totals by using a combination of these fields (i.e. Sales Category and Order Mode). The most popular choice, and default setting, is grouping by Sales Category.

If grouping by Revenue Center, Order Mode, or a combination, a custom Connex request must be made to update the configuration.

Considerations for Menu Mix Integration

PLU: CrunchTime recognizes menu items by referencing their unique PLU code (12 digits or less). In Aloha, a menu item's PLU is the ITEMID referenced in the ITM.DBF files.

Modifiers: Modifiers are used in Aloha to indicate a change to a menu item, such adding, removing, or substituting a recipe component. To accurately report on the inventory depletion of these modified menu items, CrunchTime will use additional modifier recipes to adjust inventory as necessary. If you have unique buttons for common modifications, such as 'Extra Cheese' or 'No Bacon', a 1-1 relationship between the POS button and the CrunchTime recipe can be established.

Stand-Alone Modifiers: You may use stand-alone modifiers in Aloha such as No, Add, Sub, or Extra. To establish a 1-to-1 relationship between these modifiers in the POS and the corresponding Crunchtime recipes, these stand-alone modifiers will need to be combined, or "concatenated", with other modifiers at the time sales are pulled into the Net-Chef. This allows Crunchtime to accurately adjust inventory depletion to reflect the modified menu item.

Concatenation may be required for other recipes where inventory depletion may vary, such as liquor, beer, and wine pour sizes. If these scenarios apply to your business, then you will need to work with your Crunchtime Implementation team to update the Connex integration and build concatenated modifier recipes in Crunchtime. You can reference the MOD.DBF files to determine how modifiers are configured in your POS system.



Example:

Here is an example of two modifiers concatenated into one recipe:

- Aloha Modifier 'No' – PLU 2234
- Aloha Modified 'Bacon' – PLU 5678
- CrunchTime Recipe 'No Bacon' – PLU 22345678

The PLU 22345678 is the concatenated PLU that will appear on the Menu Mix file and will indicate to Crunchtime that bacon should be added back into inventory to offset the original recipe transaction.

Quick Combos: Crunchtime can accommodate the use of Aloha Quick Combo modifiers.

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Considerations for Menu Mix Integration (Continued)

Discounts: By default, CrunchTime Menu Mix reporting is based on Gross Sales. This data drives daypart sales reporting and hourly sales values, which are seen on the Net-Chef Dashboard and in the Impact Mobile app. If a customer requires these metrics to be based off Net Sales, it will be necessary to include discounts in the Menu Mix feed. Here are the steps needed to include Discounts in your Menu Mix integration:

1. Extract a complete list of Comps and Promos from your POS system.
2. Create Recipes for all Comps and Promos in Enterprise Manager, ensuring the PLU matches the ITEMID.



Warning: The Comp and Promo ITEMID must not overlap with any existing Recipe PLUs in Crunchtime.

3. Submit a ticket to Crunchtime Support (support@crunchtime.com) with the following details:
   - *Category* – In this case, the category will always be Comp/Discount.
   - *Discount Name* – The discount name exactly as it appears in the database files.
   - *Discount GL Number* –An existing GL Number exactly as it appears in Enterprise Manager.
   - *Discount PLU* – The corresponding ITEMID / PLU for this discount.



Example: Here is an example of modifiers that would require concatenation:
- Category: Comp/Discount
- Name: 40% Employee Discount
- GL Number: 5000-8756
- PLU: 9876

Requirements for Schedule Integration

To configure the schedule integration with Aloha, the customer will need to confirm their Week Ending Day with their Implementation team.



Setup: When using Labor in Net-Chef, Post Periods MUST be set up on a weekly basis and the "Date/Week Day" for each period MUST match the Reporting Calendar and the "Week Ending Day" in the Company screen.

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SETUP GUIDE

Integrate HRBridge with Crunchtime

HRBridge Overview

HRBridge is an NCR API Product that allows for external systems like CrunchTime to create and update employees. Customers should discuss the implementation of HRBridge, along with any associated cost, with their NCR Representative.

Connecting to HRBridge

To enable connection to the HRBridge API, the following information must be provided to the CrunchTime Implementation team:

- *HRBridge URL*
- *Configuration Center (CFC) Version*
  - Version 16.7 or lower
  - Version 18.3 or lower
  - Version 18.3 or higher (preferred)
- *HRBridge Credentials* (Username and Password)
- *CFC Concept Code*
- *CFC Location Code*

Position Security Mappings

The following information must be provided for all positions that are mapped between CrunchTime and HRBridge. Click or tap on the following hyperlink to retrieve a security mapping Excel template: https://links.crunchtime.com/AlohaSecurityMappingTemplate

- *Import Code* – Typically a whole number
- *Access Level* – Typically a whole number (found in ACC.DBF file)
- *Security Level* – Typically a whole number (found in SECLVL.DBF file)
- *Mag Card Required* – Y or N
- *Job Status* – FOHOnly or FOHandBOH

Note: If you need to add additional position security mappings, please submit a request to support@crunchtime.com with the above information.

Warning: Be mindful when defining Access Levels for positions, and when linking employees to these positions. Once an employee is transferred to HRBridge, they can only receive higher Access Levels. For example, once an employee has *FOH and BOH Access* Level, HRBridge will not allow that employee to go back down to *FOH Only* access.

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Integrate HRBridge with Crunchtime

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Requirements for Labor Integration

Job Codes: These are needed for both Employee and Time Clock integrations. The master list of Position Codes and Job Codes must be aligned in both systems. The Position Name and Job Title do not matter – only the Codes need to match.

Employee ID: Required for the Time Clock integration and Employee Integration. The following fields must match between the two systems. Best practice is for all three employee numbers to align if possible.

Crunchtime	Aloha
Employee Number	Employee Unique ID
Payroll ID	Export ID
POS ID	BOH User (login)

Setup: The HRBridge employee number and HRBridge external employee number must match for successful integration. If they do not match, you'll receive an error message stating that the Employee number has already been used.

Example: 'Employee 1360 failed. Reason: [Employee.Number: The number 1360 is already used by Doe, John'].

Additional Configuration

If you are using any of the following, please notify your CrunchTime Connex to ensure the data is included in the POS feed:

- *Service Charges*
- *Order Mode Charges*
- *Refunds* (By default refunds are coded to a single GL and defined as a discount. However, they can be configured to just decrease top line sales)
- *Charge Sales/Tips* (When reviewing labor)
- *Cash Sales/Tips* (When reviewing labor)

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