

# Feature Focus Guide: Comp Approval Forms

Core Product: Aloha Quick Service, Aloha Table Service  
Last Updated: June 10, 2024

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## Revision Record

Date	Version #	Description
Prior to 12/15/2022	TS v3.670+	Initiated support for Comp Approval Forms in Table Service
	QS and TS v5.2.4.0+	Added support for Comp Approval Forms in Quick Service. Created a user interface setting in Aloha Manager for QS and TS for this feature in Store Settings > Printing > Check Content 1 tab. Prior to v5.2.4.0, you must set the CompFormOnCheck variable to True in Aloha.ini. Added support for printing the forms when the comp is added to the check, instead of waiting until the check closes.
	QS and TS v6.2.0+	Added support to use dynamic fields or variables, which are populated by the system.
	QS and TS v7.0+	Added support to use a dynamic variable to print the item(s) and modifiers(s) associated with the comp. Added support to require the user to enter a description on the comp approval form, related to the applied comp.
12/15/2022		Converted the document to use new templates.
01/11/2023		Updated front cover and back page to reflect new NCR branding.
12/14/2023		Updated document to reflect NCR Voyix branding.

## About Comp Approval Forms

Comp Approval Forms at a Glance	
Core Product	Aloha® Quick Service and Aloha Table Service
Complementary Products	None
Separate License Required?	No
Other References	Aloha Quick Service Reference Guide; Aloha Table Service Reference Guide

A comp is a method by which items on a guest check are discounted (given away as complimentary) by a dollar amount or a percentage. It is typically used for frequent diner incentives, employee meals, or to appease an upset customer. Because of possible theft, most restaurants require written documentation of who performed each comp and the reason why. To accomplish this, you can configure Aloha® Quick Service and Table Service to print an extra, user-defined form at the local printer each time you apply a comp to a check. Depending on the text defined in the form, you can include signature lines for the manager and guest to sign, the reason and description of the comp, the name of the comped item, as well as its associated modifiers and the price of each item, and more, on the comp approval form. You can retain the comp approval forms at the store, or send them to the corporate office, depending on your business needs.



Figure 1 Comp Approval Form Illustration

The comp approval form, also known as a comp slip, obtains its information from a text file located in the \Data directory. You must configure the text file in accordance with specific rules, which can include dynamic text strings that the system fills in for you without having to manually write, such as the system date, table number, manager's name, and more. Additionally, you can configure the comp approval form to require the manager to enter the reason for applying the comp.

# Configuring Comp Approval Forms

This section details the configuration requirements for comp approval forms. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task. Click Previous View  to return to this location and proceed to the next step.	
1.	Use Notepad, or a text editor of your choice, to create the comp approval form text files, using special characters and variables, as required. See <a href="#">page 5</a> .
2.	Access Maintenance > Store > Store Settings > Check Printing group to configure the Aloha program to print comp approval forms. See <a href="#">page 8</a> .
3.	Access Maintenance > Payments > Comps to require employees to enter a reason for applying a comp. See <a href="#">page 10</a> .
4.	Access Utilities > Refresh All POS Data to update the information on the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. See <a href="#">page 11</a> .

 **Tip**  
Configuration settings for the Comp Approval Form feature are identical in Quick Service and Table Service.

## Creating Comp Approval Form text files

Configuring the Comp Approval Form feature begins by creating a carefully constructed text file designed to print the form the way you want it. You can design a single form, using CompForm.txt, to use for all comps, or a comp-specific form. To design a comp-specific form, create a unique text file using the file naming convention 'CPFnnnn.txt,' where nnnn represents the comp ID (omitting any leading zeros). For example, a file named CPF105.txt prints a comp approval form specifically created for Comp ID 105, either when you apply comp ID 105 to the guest check or when you close the check, depending on your configuration.

The Aloha system prints comp approval forms in accordance with the following rules:

- If 'CompForm.txt' is the only comp form text file available, Aloha prints the same comp approval form each time you apply a comp to a guest check, regardless of the comp ID.
- If you apply comp ID 105 to a guest check, the system prints CPF105.txt, if it is available. If this file is not available, the system prints CompForm.txt, if it is available.



### Using special characters

The Comp Approval Form feature supports special characters that perform specific functions:

Special Characters Supported by the Comp Approval Form Feature	
MSG	Each active line must begin with the three characters, MSG. All other lines are ignored.
&	Placed on a single line, two character positions after the 'MSG' prefix, this symbol instructs the printer to perform a partial cut, if the printer is capable.  <b>Note:</b> Since the paper cutter on the printer is not at the same location as the print head, paper cuts may appear several lines above the location defined in CompForm.txt. You will have to experiment with your printer type and compensate for this in your comp form design.
^	Placed on a single line, two character positions after the 'MSG' prefix, this symbol inserts the system date and check number on a single line, on the left side of the form. You can also use the <SysTime> and <CkNum> variable at any point in the form in place of this symbol. Refer to <a href="#">"Using variables" on page 7</a> .
@	Placed on a single line, two character positions after the 'MSG' prefix, this symbol instructs the printer to start using a large font.
#	Placed on a single line, two character positions after the 'MSG' prefix, this symbol instructs the printer to stop using a large font.

### Using variables

The Comp Approval Form feature supports dynamic variables you can insert into the text file. Add the variable in the location at which you want it to appear in the comp approval form. The system prints only one set of data per variable. You can include multiple variables on a single line, but if the text exceeds the line length of the printout, the text wraps to the following text line.

Special Variables Supported by the Comp Approval Forms Feature	
<UnitName>	Name of the restaurant, as defined in Maintenance > Store Settings > System group > Store Information tab.
<SysDate>	Date of business in which the comp was applied.
<SysTime>	* Time of day in which the comp was applied.
<CkNum>	Check number containing the applied comp.
<TblNum>	Table or tab number containing the applied comp.
<#NumGuest>	Number of guests associated with the table.
<EmpName>	Nickname of the employee who owned the check.
<MgrName>	* Nickname of the employee who approved the comp.
<Compltems>	Long name of each comped item and its associated modifiers. Items appear on the comp approval form in the order in which they were added to the check.
<\$Compltems>	Dollar value at which each item and its associated modifiers were comped.

Special Variables Supported by the Comp Approval Forms Feature	
<code>&lt;CompName&gt;</code>	* Name of the comp applied to the check, as defined in Maintenance > Payments > Comps.
<code>&lt;\$Comp&gt;</code>	* Amount discounted from the check for this comp type.
<code>&lt;SpecialMSG&gt;</code>	Reason why a comp was applied to a guest check. You must select 'Text entry required' in Maintenance > Payments > Comps to display the Special Message screen in the FOH and force the entry of a reason when applying a comp.

*\* These variables are not supported when you apply two or more comps to the same check, or when you configure a comp approval form to print at the close of the check. In this case, the system leaves the lines blank and you must manually write in the result when the form prints.*

The comp approval form prints when you apply the comp, or when you close the check, depending on configuration. Only one instance of the comp form prints per check, regardless of how many times you apply the same comp, although you can configure Aloha to print as many as five identical copies of the form.

### Configuring Aloha to print comp approval forms

After you create the CompForm.txt or CPFnnnn.txt file, you must activate the Comp Approval Forms feature, and other requirements, within Aloha.

**To configure Aloha to print comp approval forms:**

1. Select **Maintenance > Business > Store**.
2. Select the **Store Settings** tab.

3. Select the **Check Printing** group from the bottom of the screen.

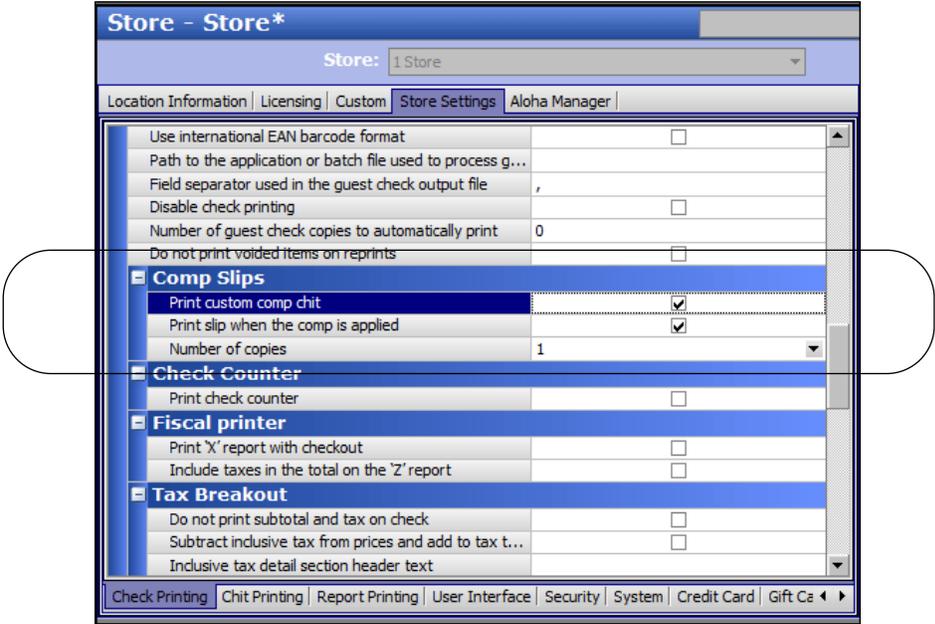


Figure 3 Store Settings - Check Printing Group

- 4. Under the Comp Slips group bar, configure the **following**:
  - a. Select **Print custom comp chit** to activate the Comp Approval Forms feature and cause information defined in appropriately named text files to print with a guest check when a comp is applied. The printed message can be different based on the applied comp.
  - b. Select **Print slip when the comp is applied** to print the comp approval form at the time you apply the associated comp to a check. If cleared, the comp approval form prints when you close the check.
  - c. Select the **number of comp approval forms to print** from the 'Number of copies' drop-down list. The forms are identical, and print one after the other.
- 5. Click **Save** in the Commands panel.
- 6. Click **Close** in the Commands panel to exit the **Stores** function.

## Configuring a comp to require a reason

To require employees to enter a reason for applying a comp, use 'Text entry required,' in Comp Maintenance. To also have the entered reason appear on the comp approval form, be sure to include the 'SpecialMSG' variable in your comp approval form design. Refer to ["Using variables" on page 7](#).

### To require employees to enter a comp reason:

1. Select **Maintenance > Payments > Comps**.

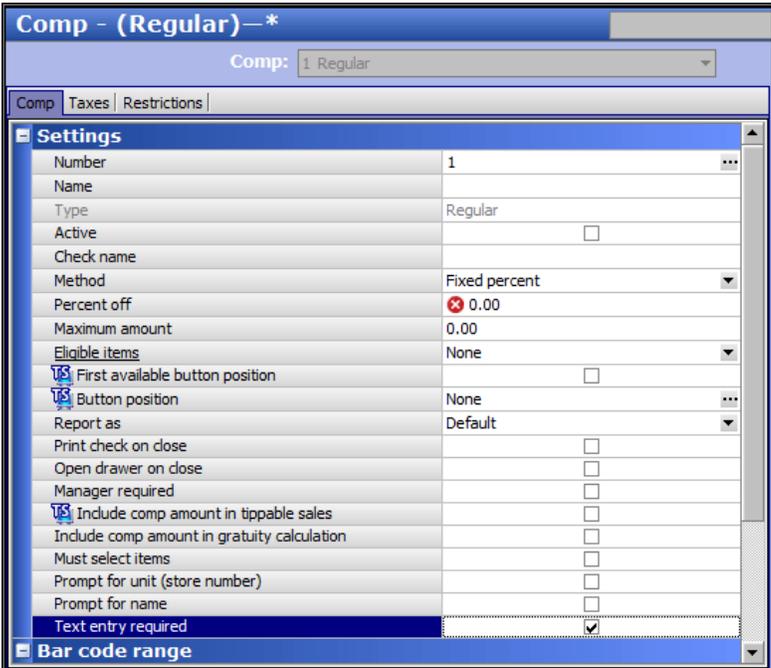


Figure 4 Comp - Comp Tab

2. Select a **comp** from the drop-down list.
3. Under the Settings group bar, select **Text entry required** to force the entry of a descriptive reason, using the FOH Special Message screen, for applying the comp. You must include the SpecialMSG variable in the comp approval form design (CompForm.txt or CPFnnnnn.txt) to print the entered reason on the form.
4. Click **Save** in the Commands panel.
5. Click **Close** in the Commands panel to exit the **Comps** function.

## Refreshing the data

After all settings are in place, you must select Utilities > POS > Refresh POS & All Installed Products to transfer the new information to the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. If you run the refresh prior to the EOD process, select 'Automatically restart all POS terminals' and click OK to continue. After the data refresh is complete, all new settings become operational across the Aloha network.



### Caution

Refresh data with caution and never during peak hours of operation. All FOH terminals reboot during a refresh and are down for a short period of time.

## Using Comp Approval Forms

When you apply a comp in the FOH, the system prints a comp approval form at the local printer, either at the time you apply the comp or when you close the check.

### To print a comp approval form:

1. When you are ready to **apply the comp** to the check, recall the check and apply the appropriate comp. If the comp requires a reason for entering the comp, the Special Message screen appears.

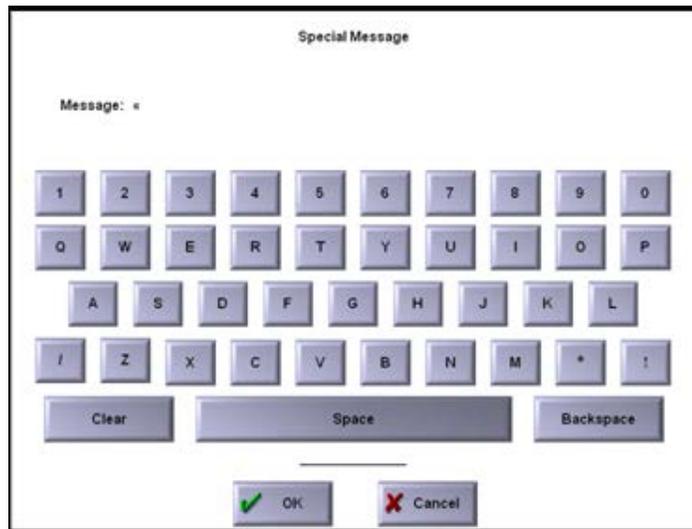


Figure 5 FOH Special Message Screen

2. Enter a **descriptive reason** for entering the comp, using the alphanumeric keypad, and press **OK**. If you do not enter a reason, a message letting you know you have not entered a reason appears. Touch in the message to clear it from the screen and enter a reason.

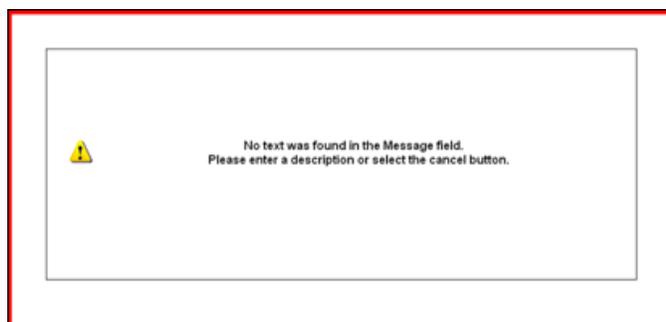


Figure 6 FOH No Text Entered Message

**Note**

If you choose to touch Cancel on the Special Message screen, the system does not apply the comp and returns you to the screen containing the comp button, from which you must apply the comp again.

3. After successfully applying the comp, depending on your system, the comp approval could print at this time; otherwise, the form prints to the local printer when you close the check.

OR004 Aloha Cafe  
03/16/2010  
03:31 PM  
\*\*\*\*\* Comp Slip \*\*\*\*\*  
CHECK#: 30015  
ORDER#: 314  
GUESTS: 0  
EMPLOYEE: Trina  
MANAGER: Trina  
Cheese Medium 12.99  
Pizza Sauce 0.00  
COMP: Manager% 12.99  
Pizza was served burned and was cold.  
\_\_\_\_\_  
Waitperson Emp#  
\_\_\_\_\_  
Customer/Employee Signature  
\_\_\_\_\_  
Manager Signature

Figure 7 Example of a Printed Comp Approval Form

4. Close the **check**, as normal.

When you receive the printout of the comp approval form, manually fill out the information that is not system-generated. You can hand the completed form to the guest or keep it for your records, depending on company policy.

## Troubleshooting Comp Approval Forms

If the Comp Approval Form fails to print, check the following:

- Verify the file, 'CompForm.txt' exists in the %lberdir%\Data folder.
- Verify the contents of the file are configured per the requirements outlined in this document.
- If you are trying to print a specific comp form for each type of comp you use, verify you have a text file, appropriately named, for each comp, and that the contents of each file are configured as required.
- Verify printers and printer groups are specified for all active terminals from which you reasonably expect to print a comp approval form.

If the comp approval form prints, but the contents are not as expected, check the following:

- Verify the file names refer to the correct comp IDs, if you are using a text file for each type of comp.
- Verify the contents of each file is correctly configured, in accordance with the information in this document. Pay careful attention to the sections that discuss rules and variables.

## Comp Approval Forms, Feature Focus Guide

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