

Feature Focus Guide: Sweetened Beverage Tax

Core Product: Aloha Quick Service, Aloha Table Service
Last Updated: July 16, 2024

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Revision Record

Date	Version #	Description
04/28/2023	v12.3+	Created Sweetened Beverage Tax Feature Focus Guide.
07/16/2024		Updated document to reflect NCR Voyix branding.

About Sweetened Beverage Tax

Sweetened Beverage Tax at a Glance	
Core Product	Aloha Table Service, Aloha Quick Service
Supported Version	All
Complementary Products	None
Separate License Required?	No
Other References	Aloha Table Service Reference Guide, Aloha Table Service Report Guide, Aloha Quick Service Reference Guide, Aloha Quick Service Report Guide

Several regions across both the United States and Internationally implemented a Sweetened Beverage Tax (SBT), which mandates a levy by fluid ounce, based upon the amount of sugar in the drink. The tax is also called 'sugar tax,' 'sugary tax,' or 'soda tax,' The rationale of a sweetened beverage tax is to curb the consumption of overly sweetened beverages and reduce the risk of health concerns, such as obesity, cancer, and type 2 diabetes. The monetary value of the tax is dependent on the amount of sugar found in or added to the product. Current legislations have designed tiers by fluid ounce by which to tax.

! Important

We strongly recommend you refer to your local legislation to ensure you are in compliance with your local tax laws.



Figure 1 Sweetened Beverage Illustration

The tax is assessed in addition to any other normal tax for the region. You can use a tax breakout or simply list the tax name to show you collected the sweetened beverage tax.

Configuring Sweetened Beverage Tax

This section details the configuration requirements within Aloha Manager and Aloha Configuration Center (CFC) for Sweetened Beverage Tax. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Sweetened Beverage Tax Procedures at a Glance:

If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.

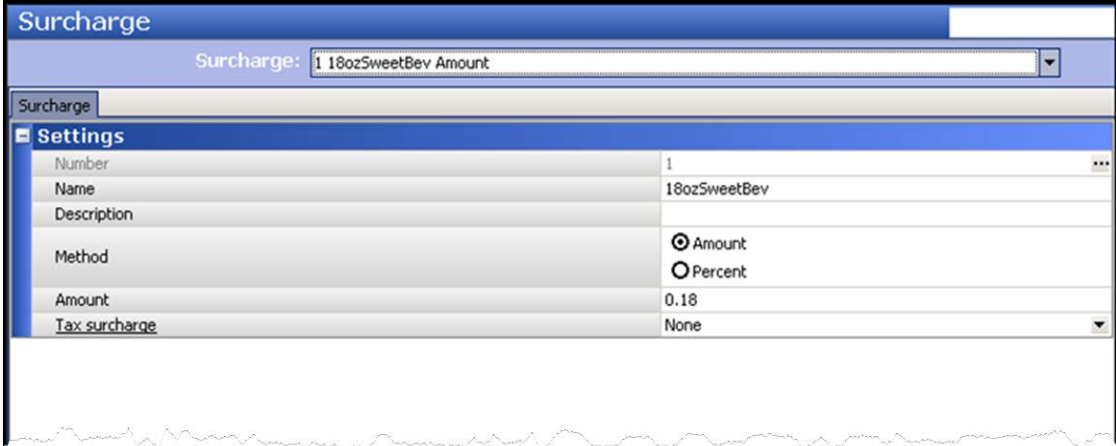
1.	Select Maintenance > Taxes > Surcharge and create a surcharge for each size drink you sell. Set 'Amount' to equal the tax rate per fluid ounce. See page 6 .
2.	Select Maintenance > Taxes > Tax Group and create a tax group for each sugary size drink you sell. See page 7 .
3.	Select Maintenance > Menu > Items and associate the tax group to the appropriate item. See page 8 .
4.	Select Business > Store > Store Settings and select 'Enable surcharges.' See page 9 .
5.	Select Utilities > Refresh POS & All Products to refresh the data. See page 10 .

Creating a Sweetened Beverage Tax surcharge

You must create a surcharge for each size of beverage you sell.

To create a Sweetened Beverage Tax surcharge:

1. Select **Maintenance > Taxes > Surcharge**.
2. Click **New** to create a new surcharge.



The screenshot shows a software interface for configuring a surcharge. At the top, there is a title bar labeled 'Surcharge' and a dropdown menu showing '1 18ozSweetBev Amount'. Below this is a 'Settings' section with a table of configuration options:

Settings	
Number	1
Name	18ozSweetBev
Description	
Method	<input checked="" type="radio"/> Amount <input type="radio"/> Percent
Amount	0.18
Tax surcharge	None

Figure 2 Surcharge Function

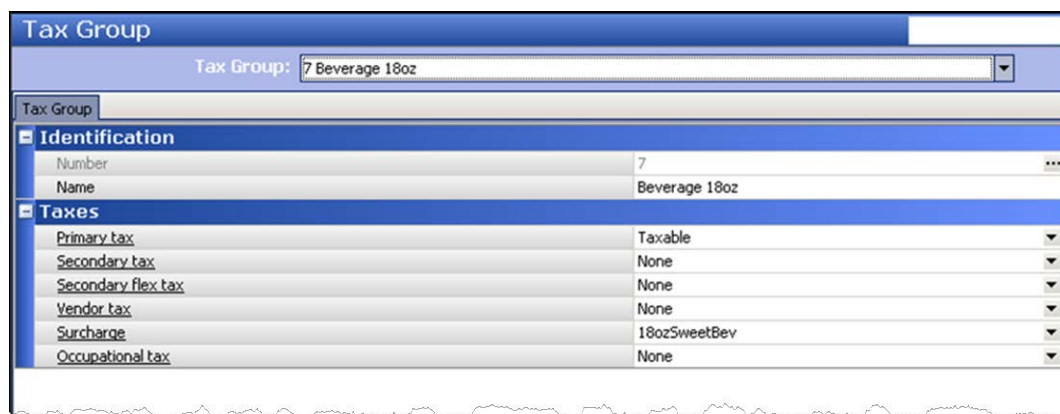
3. Under the 'Settings' group bar, type a **name** for the surcharge, such as '18ozSweetBev.'
4. Select **Amount** as the 'Method.'
5. Type the **amount per ounce** in 'Amount.' For example, 0.18 for 18 oz drinks, 0.12 for 12 oz drinks.
6. Select your **existing beverage tax group** from the 'Tax surcharge' list box, only if the local taxing authority requires you to tax the surcharge.
7. Click **Save**.
8. Repeat this **procedure** to create other surcharges specific to the fluid ounces of the product.
9. Exit the **Surcharge** function.

Creating a Sweetened Beverage Tax tax group

A tax group is a collection of separate taxes you can associate to other elements without the need to associate one tax at a time. You can also associate a surcharge to the tax group so when the tax is applied, the surcharge is also applied. Create tax groups that include the sweetened beverage surcharge so you can associate them to the appropriate item.

To create a Sweetened Beverage Tax tax group:

1. Select **Maintenance > Taxes > Tax Group**.
2. Click **New** to create a new tax group.



Tax Group	
Tax Group: 7 Beverage 18oz	
Tax Group	
Identification	
Number	7
Name	Beverage 18oz
Taxes	
Primary tax	Taxable
Secondary tax	None
Secondary flex tax	None
Vendor tax	None
Surcharge	18ozSweetBev
Occupational tax	None

Figure 3 Tax Group Function

3. Under the 'Identification' group bar, type a **name** for the tax group, such as 'Beverage 18oz.'
4. Under the 'Taxes' group bar, select the applicable **primary tax type** from the list box.

Tip

The Primary tax is a percentage tax that is specific to each location

5. Select any applicable **secondary, secondary flex, or vendor tax type**.
6. Select the applicable **surcharge** from the list box.
7. Select the occupational **tax type**, if applicable.
8. Click **Save**.
9. Repeat this **procedure** to create another tax group.
10. Exit the **Tax Group** function.

Associating Sweetened Beverage Tax tax group to an item

You must associate the appropriate tax group to the corresponding beverage item. The makeup of beverages in your database could vary. Typically, a separate item is created based on size, which is ideal for this solution. For example, if you sell a beverage by small, medium, and large, a separate item is created for each and you can easily associate the correct tax group to the appropriate size of beverage. Similarly, if you sell canned and bottled beverages, each item is sold by size.

If you have a single beverage item that represents all sizes, consider breaking up the beverage items in your database, by size. You should also consider diet and 'sugar-free' beverages you sell, and tax them appropriately.

To associate the Sweetened Beverage Tax tax group to an item:

1. Select **Maintenance > Menu > Items**.
2. Select a **beverage item** from the list.

The screenshot shows the 'Items' configuration window for item 76. The 'Assignments' section is expanded, showing the following settings:

Section	Field	Value
Settings	Number	76
	Type	Standard
	Short name	Soda 18oz
	Chit name	Soda 18oz
	Chit name alternate	
	Long name	Soda 18oz
	Long name alternate	
	Button image	None
	Control name	
	Ask for description	<input type="checkbox"/>
Export ID	0	
Assignments	Tax group	Beverage 18oz
	Concept	None
	Sales/retail category	BEVERAGES
Auto menu	Priority	1 Highest
	Slave to item	None
Advanced Pizza	Topping	<input type="checkbox"/>
	Pizza	<input type="checkbox"/>
	Fraction	<input type="checkbox"/>

Figure 4 Items - Item Tab

3. Under the 'Assignments' group bar, select the appropriate **tax group** from the 'Tax group' drop-down list. For example, if your small beverage is 18 ounces, select the tax group you created for the 18 oz sweetened beverage tax.

4. Click **Save**.
5. Repeat this **procedure** for other items that require the sweetened beverage tax group.
6. Exit the **Items** function.

Enabling surcharges at the site level

After you configure your surcharges, tax groups, and items, you must enable the use of surcharges at the local site. If you are using Aloha Manager, you only have a single site; however, if you are using Aloha Configuration Center with multiple sites, you need to enable the use of surcharges at each site. You also specify the name of the surcharge that appears in the guest check window and printed receipts.

To enable surcharges at the site level:

1. If you are using Aloha Configuration Center, select a **site**. If you are using Aloha Manager, continue to the **next step**.
2. Select **Maintenance > Business > Store**.
3. Select the **Financials group** at the bottom of the screen.
4. Under the 'Surcharge' group bar, select **Enable Surcharge**.

Setting	Value / Status
Show tax details on screen	<input type="checkbox"/>
Calculate quick combo tax based on cost of sales	<input type="checkbox"/>
Goods and services tax (GST)	
Goods and services tax	None
Apply GST to comp amount	<input type="checkbox"/>
Apply GST to promo discount	<input type="checkbox"/>
Print tax invoice for totals over this amount	0.00
Category of items to exempt from GST	None
Surcharge	
Enable Surcharges	<input checked="" type="checkbox"/>
Surcharge text	Sweetened Bev Tax
Guest pays surcharge	<input checked="" type="checkbox"/>
Enable Smart Surcharges	<input checked="" type="checkbox"/>
Display all surcharges on one line	<input type="checkbox"/>
Apply surcharge to zero-priced items	<input checked="" type="checkbox"/>
Apply surcharge to voided items not returned to inventory	<input checked="" type="checkbox"/>
Apply surcharge to discounted items	<input checked="" type="checkbox"/>
Reports	
Exclude voided items from gross sales	<input checked="" type="checkbox"/>
Include promos discounts in gross sales	<input type="checkbox"/>
Include comps in net sales	<input type="checkbox"/>
Include promo discounts in net sales	<input type="checkbox"/>
Exclude open sales from BOH reports	<input checked="" type="checkbox"/>
Exclude open sales from Server Sales report	<input type="checkbox"/>
Include modifiers on FOH Product Mix report	<input type="checkbox"/>
Exclude 100% comp checks from guest and check counts	<input type="checkbox"/>
Display FOH labor hours format	<input checked="" type="radio"/> Minute <input type="radio"/> Decimal
Print both minute and decimal formats on timedock chits	<input checked="" type="checkbox"/>

Figure 5 Store Settings - Financial Group

5. Type the **text** to appear on the FOH screen to identify this charge, such as 'Sweetened Bev Tax.'
6. Select **Guest pays surcharge**, if desired.

7. Optionally select **whether all surcharges appear on one line**, if desired.
8. Optionally select **Apply surcharge to discounted items**, if desired.
9. Click **Save** and exit the **Store** function.

Refreshing the data

After all settings are in place in Aloha Manager, it is necessary to 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.

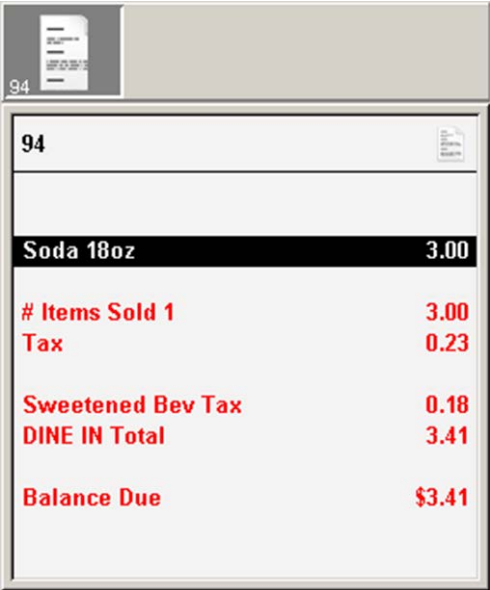


Caution

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 Sweetened Beverage Tax

When the consumer orders a sweetened beverage, the tax is applied and appears in the guest check window and printed receipts.



The screenshot shows a digital guest check window. At the top left, there is a small icon of a receipt and the number '94'. Below this, the main check area displays the following items and amounts:

Soda 18oz	3.00
# Items Sold 1	3.00
Tax	0.23
Sweetened Bev Tax	0.18
DINE IN Total	3.41
Balance Due	\$3.41

Figure 6 Sweetened Beverage Tax on Guest Check Window

Sweetened Beverage Tax, Feature Focus Guide:

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