

Aloha Smart Manager Starter User Guide

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Getting Started with Aloha Smart Manager

Aloha[®] Smart Manager (ASM) is a cloud-based, all-in-one restaurant management solution for reporting, inventory, scheduling, and labor management. ASM is intuitive, easy to set up, and offers a great user experience.

Labor Management — Manage and configure employee records and jobs, create schedules, monitor and edit employee punches, configure and manage labor rules, and use key labor reports to help manage labor spend and ease payroll processing.

Inventory Management — Configure and maintain vendors, process and track invoices, configure raw items and map with the vendor items and maintain units of measure to support invoicing, and report on invoice history to keep track of costs.

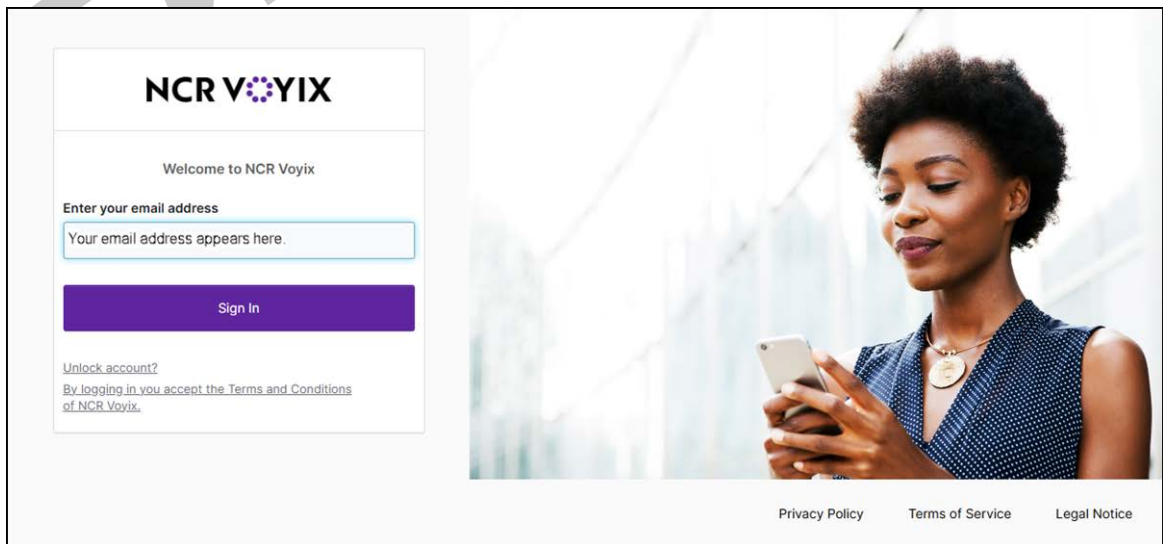
Sales Management — Track key restaurant sales metrics through a core set of reports, run a profit and loss statement for a view of restaurant profitability, view and reprint POS transactions, reconcile shift and daily cash transactions.

Signing in and logging out of Aloha Smart Manager

After successfully creating your account, every time you launch Aloha Smart Manager, the landing page appears. Your account profile and level of access control the information that appears on the landing page.

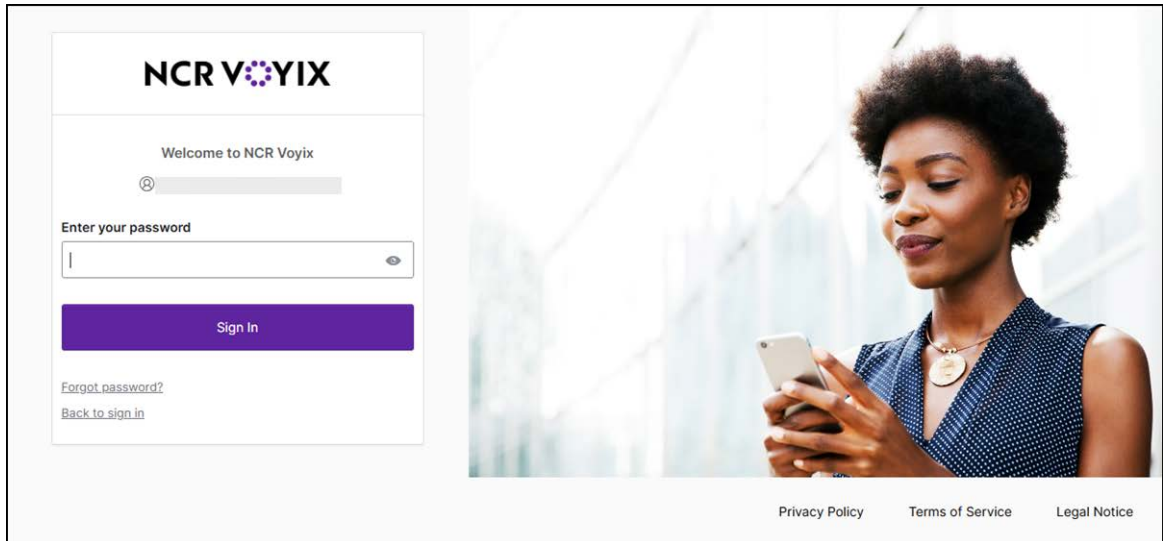
To sign in to ASM:

1. Launch **Aloha Smart Manager**. The Welcome to NCR Voyix login screen appears.



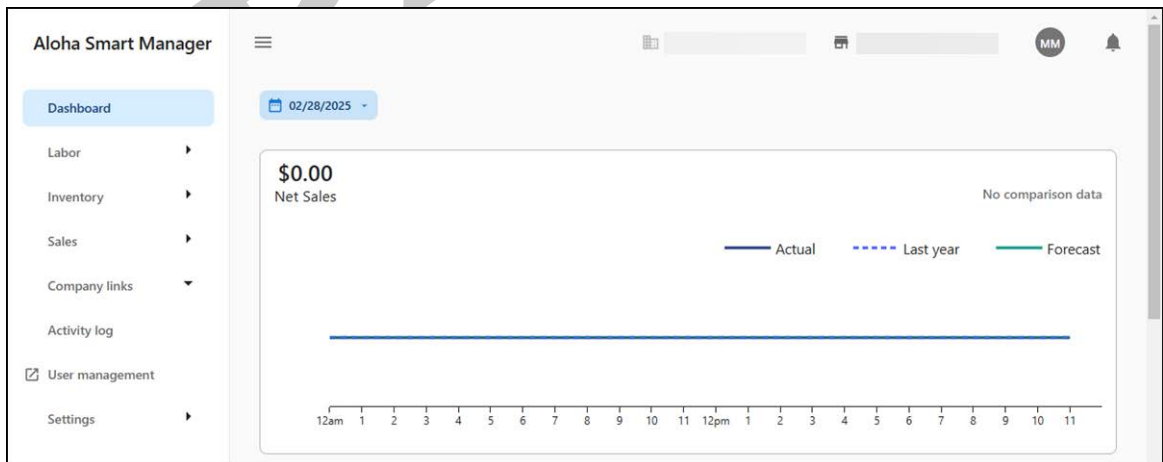
Welcome to NCR Voyix email address entry screen

2. Verify the **email address** that appears is correct and click **Sign In**.



Welcome to NCR Voyix password entry screen

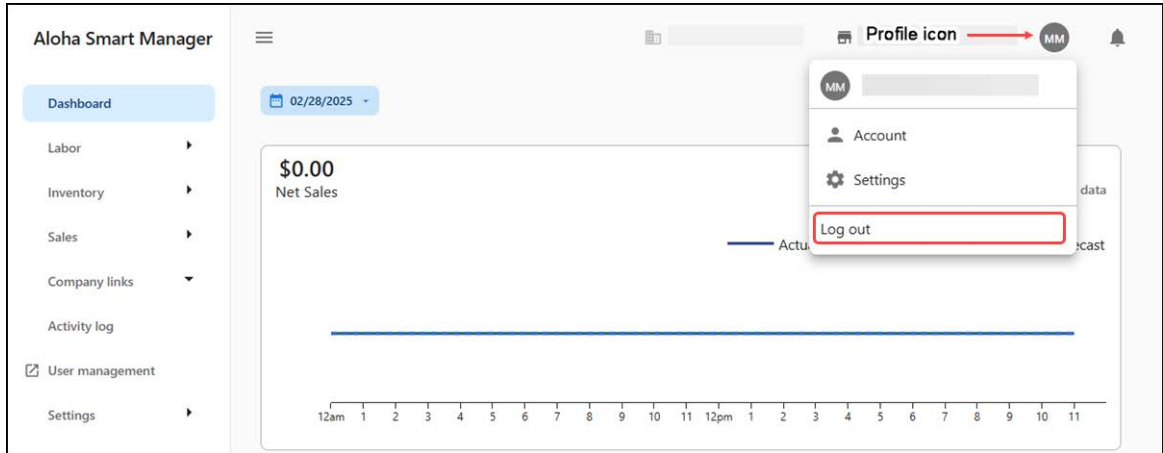
3. Type your **password** and click **Sign In**. Aloha Smart Manager opens to the landing page with the store mapped to your account appearing in the top right corner and the dashboard appearing on the screen, if available for your user profile.



ASM landing page

To log out of ASM:

1. Click the **profile icon** in the top-right corner.



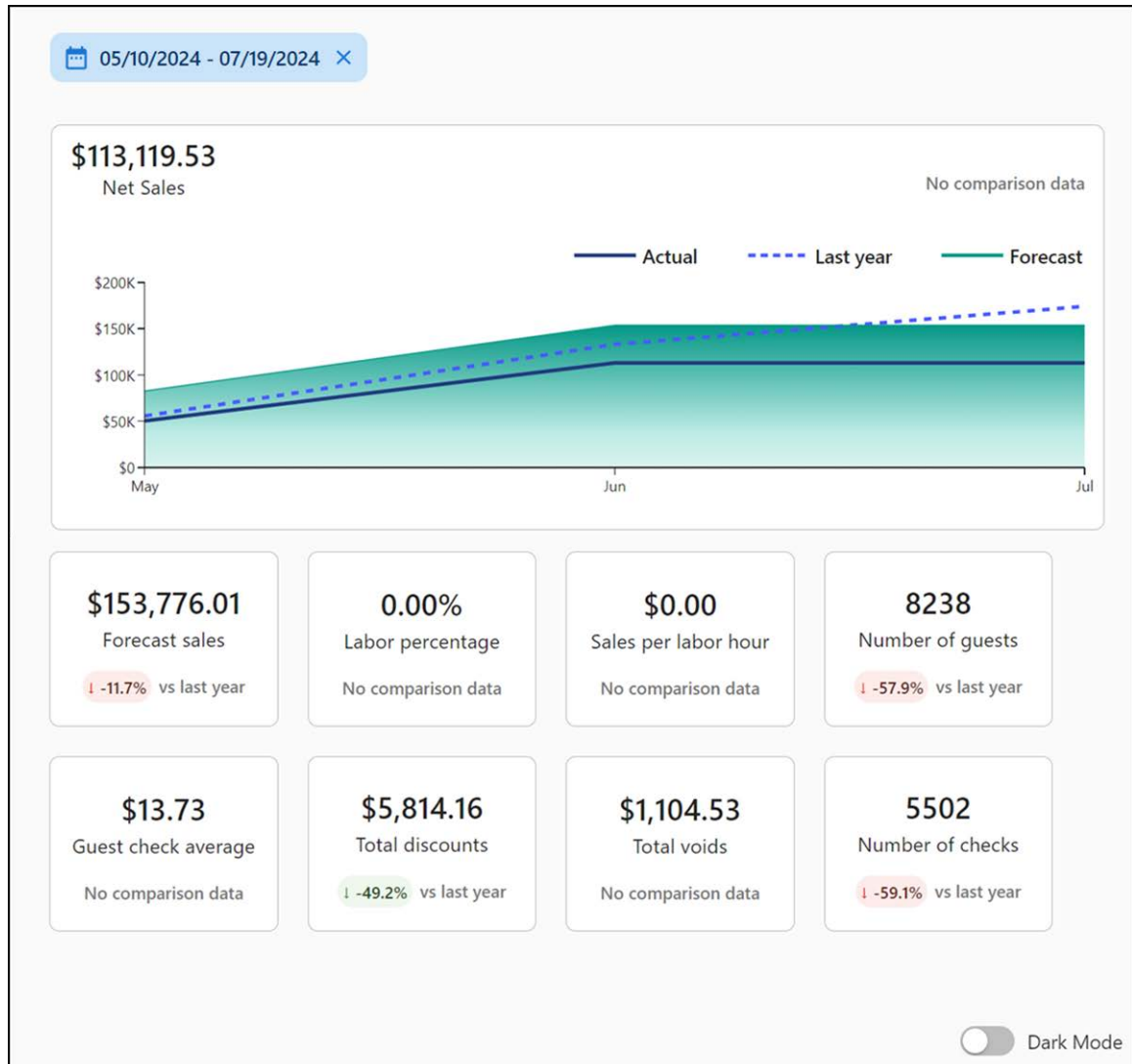
Logging out of ASM

2. Click **Log out**.

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Working with the dashboard

The dashboard appears on the landing page when you sign in to Aloha Smart Manager, if available for your user profile, and provides an 'at-a-glance' view of the performance of your restaurant. The data generated on the dashboard is from the period selected from the calendar start and end options for the currently selected site. Each time you sign in, the data from the previous day appears by default. The data appears as a graphical line chart and interactive widgets.



ASM dashboard

The following widgets help you navigate to a specific report or screen:

Widget	Purpose
Forecast sales	View the sales forecast in detail. Note: This widget is not interactive in this release.
Number of guests	View the total number of guests who visited the store, for the selected period. Select this widget to navigate to the Sales summary report.
Guest check average	View the average amount of sales per guest check for the selected period. Note: This widget is not interactive in this release.
Total discounts	View the total number of discounts applied for the selected period. Select this widget to navigate to the 'Viewing transactions' screen.
Total voids	View the total voided transactions for the selected period. Select this widget to navigate to the 'Viewing transactions' screen.
Number of checks	View the total number of checks for the selected period. Select this widget to navigate to the 'Viewing transactions' screen.

Changing the date to report

The dashboard displays data for the previous day, by default; however, you can switch to another date or select multiple dates to appear.

To switch between dates:

1. Sign in to **Aloha Smart Manager**.
2. Select the **site (store)** from the top-right corner. By default, the data for the previous date appears in the dashboard. For example, if the current date is October 16, 2023, the data for October 15, 2023 appears.
3. Select the **start** and **end dates**. The data appears in the dashboard for the selected date range.



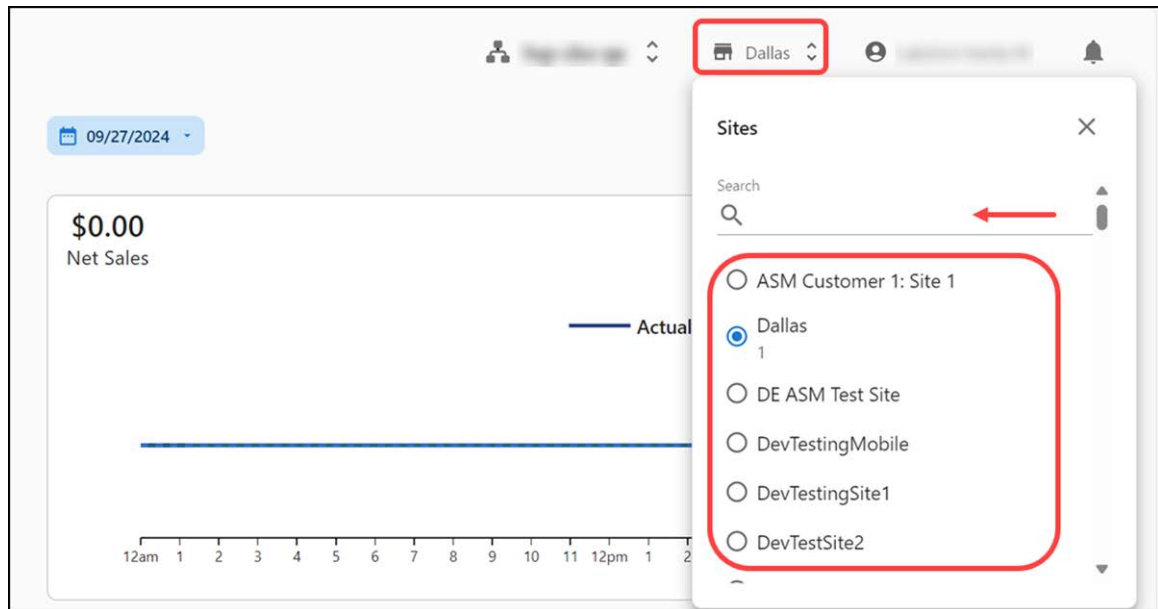
Tip

Alternatively, you can select the start and end dates from the predefined date range picker (**Yesterday, Last 7 days, Last 14 days, Last 30 days, and Last 90 days**) to generate data for the corresponding number of days.

Changing the site

The dashboard displays for the default site assigned to you. If you use a multi-store account, you can easily switch from one site to another to view data and perform tasks within that site. A manager or administrator can assign access to multiple sites for an employee.

1. Sign in to **Aloha Smart Manager**. The dashboard appears.
2. In the top-right corner, click the displayed **site**. The 'Sites' search box appears with the currently selected site appearing first.

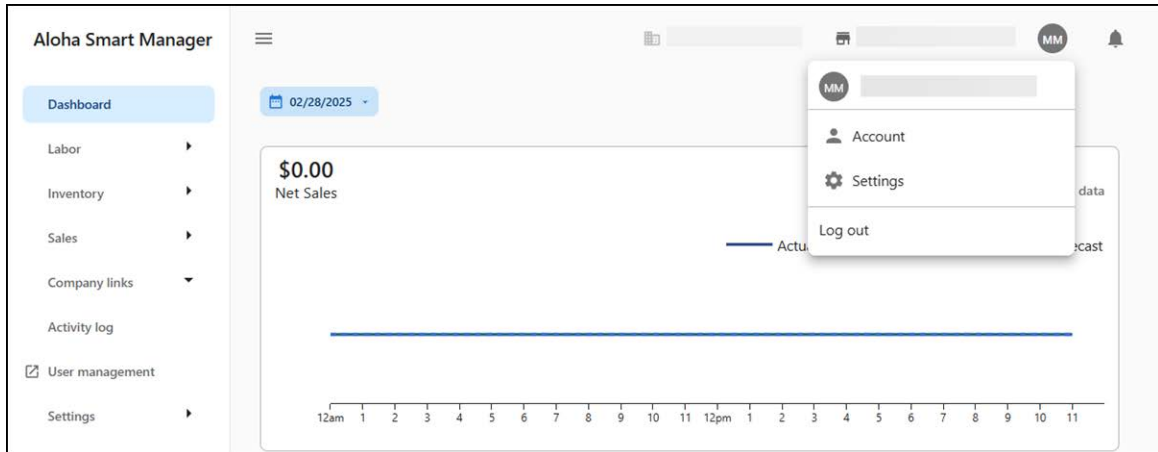


Switching between sites

3. If needed, click **View all sites** and type the **site name** in 'Search' to narrow the list of sites from which to choose.
4. Select the **site**. The dashboard refreshes to display the data for the selected site.

Working with your account

When you sign in to ASM, the profile icon appears in the top right corner of the screen, with either Multi-Store (All Stores) or the specific store name appearing.



ASM profile icon and menu

Click the profile icon to access a menu from which you access several options that allow you to control your ASM environment.

Establishing your account profile, preferences, and login credentials

When your account was first created in ASM, if you were designated as an above-store employee, you were redirected to NCR Identity from the Welcome email to complete the creation of your user profile. This information is available for edit when you select Account from the menu that appears when you click your profile icon.

Note

If you did not receive a Welcome email, your account preferences are set up for you.

Use the information in the following screens to make changes to your first and last name, phone number, email address, display options, login credentials, and more.

The screenshot displays the 'Profile' management interface. On the left, a sidebar lists 'Profile', 'Preferences', and 'Security'. The main area is titled 'Profile' with the subtitle 'Update and manage your personal details in one place.' It features three expandable sections: 'Basic info' (with a pencil icon), 'Email' (with an envelope icon), and 'Address' (with a location pin icon). The 'Basic info' section is expanded, showing fields for 'First name' (NCR), 'Last name' (Admin), 'Date of birth' (-), and 'Phone number' (-). The 'Email' section shows the current email 'ncr.cbo.eng.qe.adm+admin@gmail.com' and a 'Change email' button. The 'Address' section is currently empty.

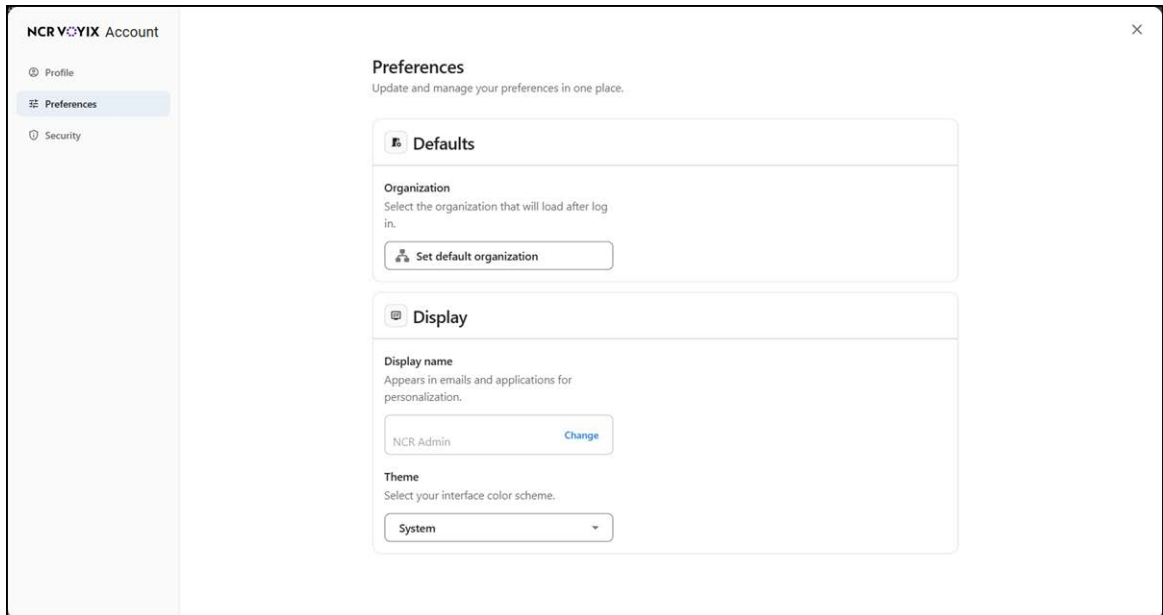
Account > 'Profile' screen

To update your account profile:

1. Click the **profile icon** and select **Account** from the menu that appears. The information available from Account is categorized into three areas: Profile, Preferences, and Security, with the 'Profile' screen appearing by default.
2. Under the 'Basic info' group bar, click the **pencil** to expose the **first name, last name, date of birth, and phone number**, make the necessary **changes**, and click **Save**.
3. Under the 'Email' group bar, click **Change email** to change the email address and click **Submit**.
4. Under the 'Address' group bar, click the **pencil** to change the **address** and click **Save**.
5. Continue to the **next procedure** or click **X** in the top right corner of the screen to exit the **Account** function.

To update your account preferences:

1. Select **Preferences** in the navigation pane on the left.

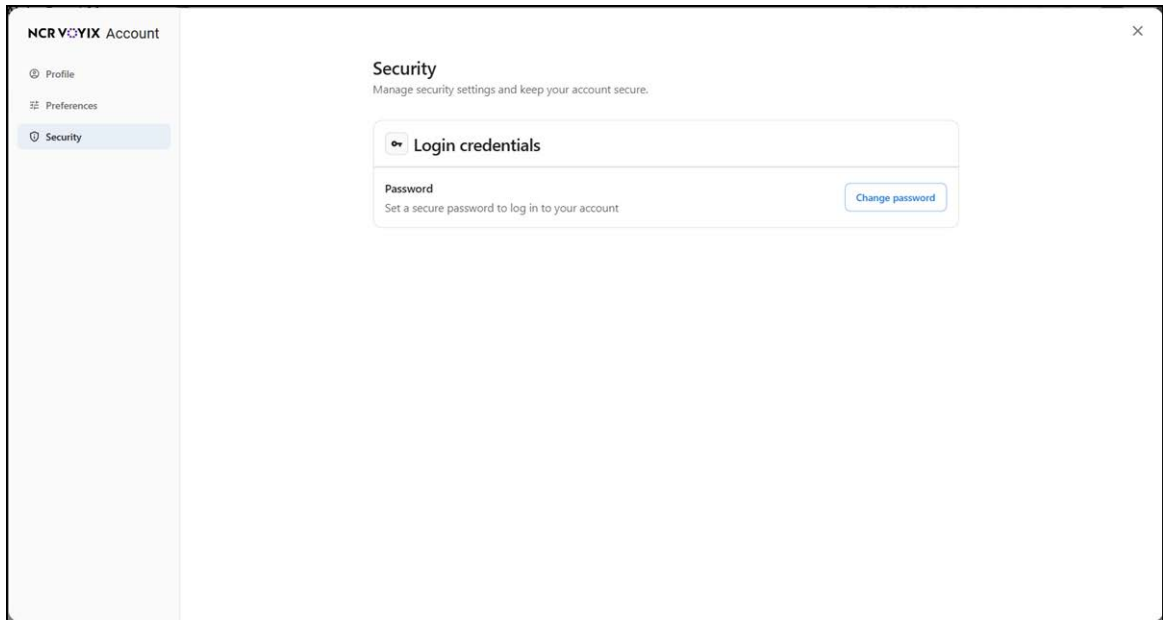


Account > 'Preferences' screen

2. Under the 'Defaults' group bar, click **Set default organization** to establish the **organization** that loads upon login.
3. Under the 'Display' group bar, click **Change** under 'Display name' to change the name that appears on the screen when you sign in, and click **Save**.
4. Select the **interface color scheme** from the 'Theme' drop-down list. Your choices are System, Dark, and Light.
5. Continue to the **next procedure** or click **X** in the top right corner of the screen to exit the **Account** function.

To update the password to use when logging in to ASM:

1. Select **Security** in the navigation pane on the left.



Account > 'Security' screen

2. Under the 'Login credentials' group bar, click **Change password**, follow the prompts to enter the **new password**, and click **Submit**.
3. Click the **X** in the top right corner of the screen to exit the **Account** function.

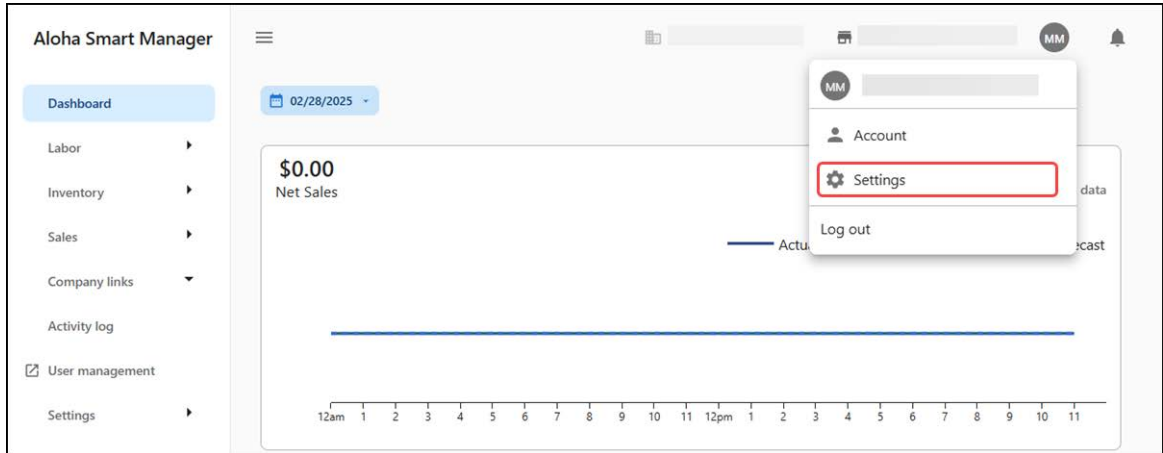
Configuring your local system settings

Use the Settings menu option to customize how the application formats dates, times, numbers, and language used throughout the application for your user profile. There are two screens available when you select Settings: Account preferences and Notification settings.

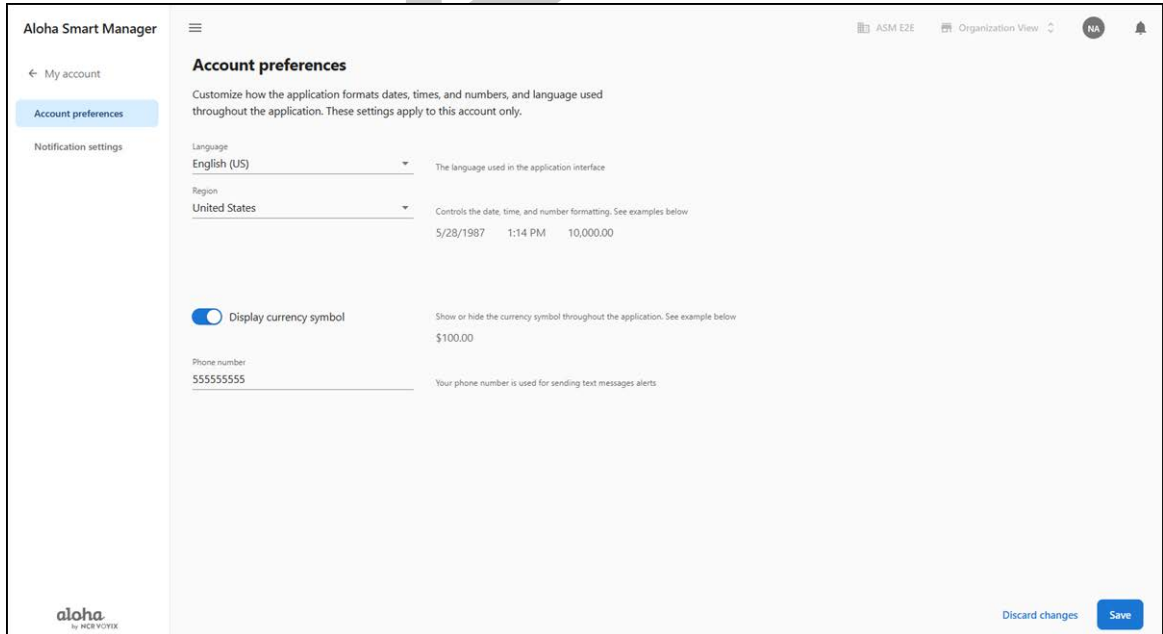
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To establish your account preferences:

1. Click the **profile icon** in the top-right corner of the screen.



2. Select **Settings** from the menu that appears. The 'Account preferences' screen appears by default.



'Account preferences' screen

3. Select the **language** to use across the user interface. By default, English (US) is set as the preferred language. Additionally, you can turn on or off the display of the currency symbol.

4. Select the **country** from the 'Region' drop-down list. When you select a region, the date, time, and number format change dynamically. This changes the date, time, and number format across the application. Currently, ASM supports the following countries:
 - **United States** — The date, time, and number format specific to the U.S. is used, such as 5/28/1987 1:14 PM 10,000.00. The date is set to mm/dd/yyyy format. The time is set to hh:mm AM/PM 24-hour clock format. The numbering contains comma (,) as separators along with two-digit decimal value.
 - **Mexico** — The date, time, and number format specific to Mexico is used, such as 28/5/1987 13"14 10,000.00. The date is set to dd/mm/yyyy format. The time is set to hh:mm 24-hour clock format. The numbering contains comma (,) as separators along with two-digit decimal value.
 - **Canada** — The date, time, and number format specific to Canada is used, such as 1987-05-28 13h 14 10 000,00. The date is set to yyyy-mm-dd format. The time is set to hh mm 24-hour clock format (here, **h** appears next to hours). The numbering contains no separators, but it contains comma (,) as a decimal separator.
5. Toggle **Display currency symbol** on or off to control the visibility of the currency symbol on the screen. The currency format depends on the selected region. For example, if 'Display currency symbol' is toggled on, the amount appears as \$100.00 for the U.S. and Mexico, and 100,00 \$ for Canada. When toggled off, the currency symbol does not appear, such as 100.00.
6. Type the **phone number** to use for SMS (Short Message Service) alerts.
7. Click **Save** to confirm the changes.

Configuring and using notification groups

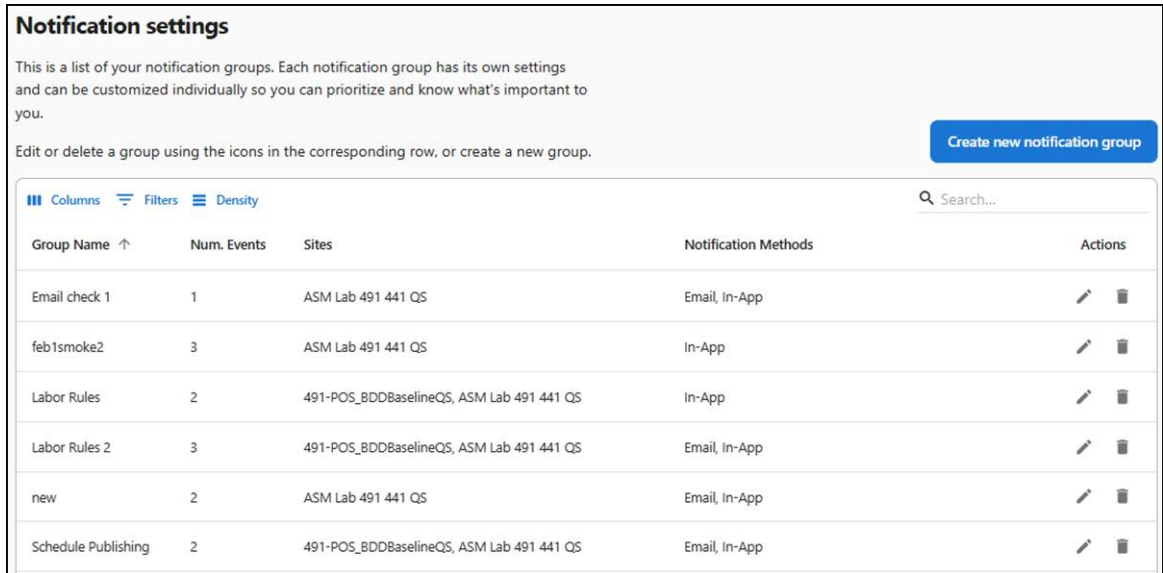
Select Notification settings in the navigation bar on the left to create general site notifications that appear to all users at login during the designated time frame. A notification group allows you expedite messages of upcoming events and announcements to select employees without directly interacting with the recipients. Each notification group utilizes one or many events that allow you to send notifications through an email, an SMS text message, or an in-app message. You can also set priorities on the notification as high or normal.

Examples of how you can use a notification are:

- Let an employee know they did not, or were late to clock in.
- The stock of an inventory item is running low or is at zero.

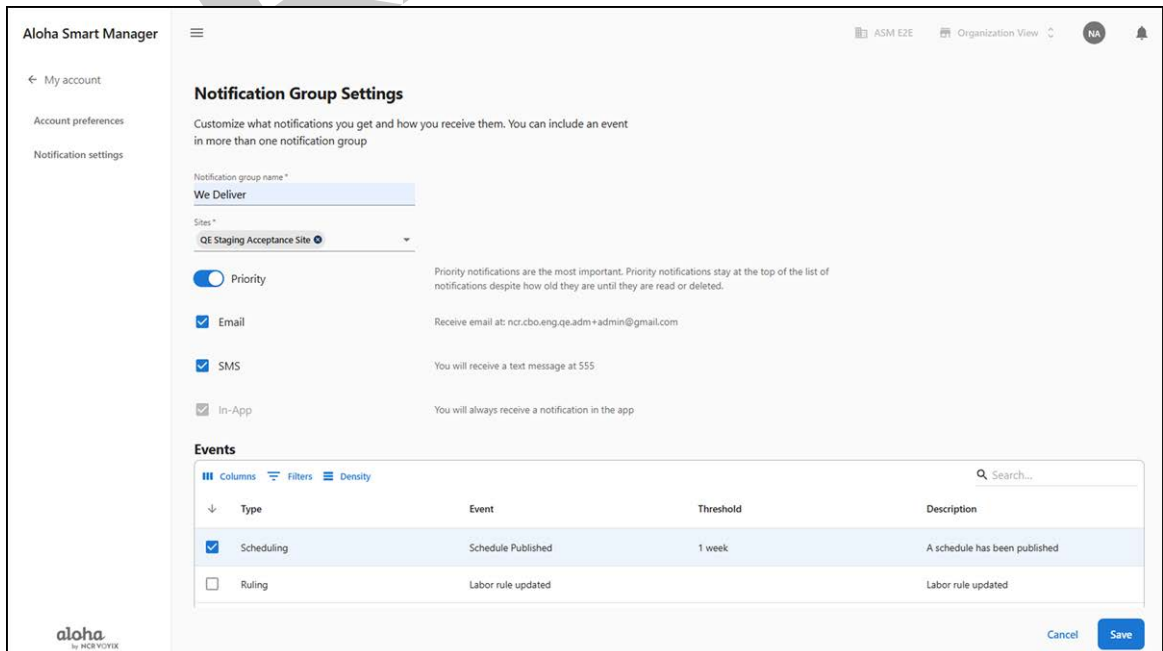
Configuring notification groups

1. Click the **profile icon** in the top-right corner of the screen.
2. Select **Settings > Notification settings**. The 'Notification settings' screen appears.



'Notification settings' screen

3. Click **Create new notification group**. The 'Notification Group Settings' screen appears.



'Notification Group Settings' screen

4. Type a **name** for the notification group.
5. Select the **sites** to include in the notification group. Only the sites to which you have access are available for selection.
6. Toggle **Priority** to on to set a high priority for the events within the notification group. A high priority event appears at the top of the notification list until it is read or deleted. Toggle **Priority** to off to set a normal priority for the events within the notification group.
7. Select **Email** to send the notification by email. The system defaults to the email address of the person who is logged in to Aloha Smart Manager.
8. Select **SMS** to send the notification by short message service (SMS). The system defaults to the phone number configured in the 'Account preferences' screen.

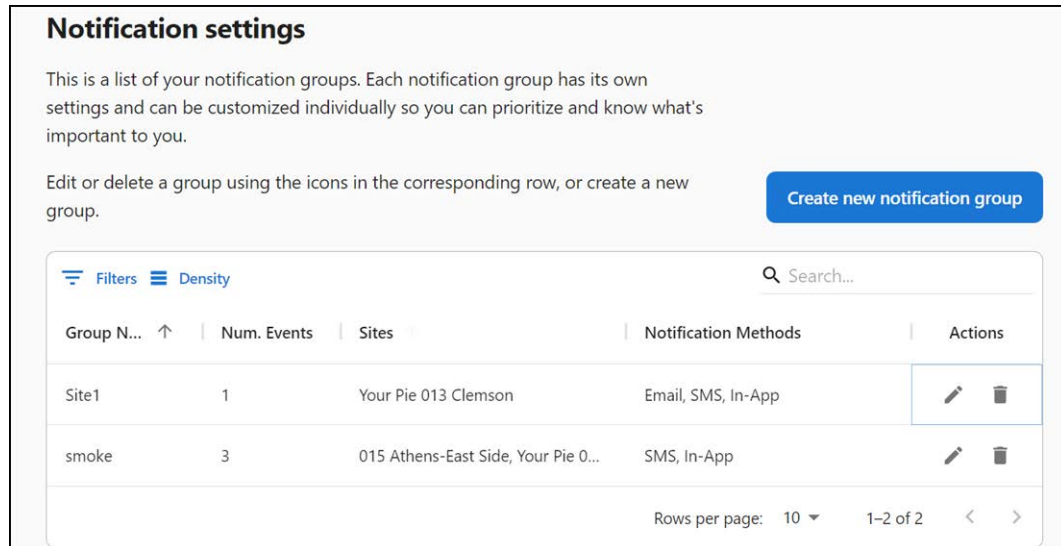
 **Tip**

To use a different phone number, click 'Add phone number' to display the 'Account preferences' screen and enter a phone number. For more information, see [Configuring your local system settings](#).

9. Select **In-App** to receive notifications within the application. You can select the 'bell icon' in the top-right corner of the dashboard to view these events.
10. Under the Events section, select the **event(s)** to include in the notification group. You can add multiple events to a single notification group.
11. Click **Save** to create the notification group. The notification group appears in the 'Notification settings' screen.

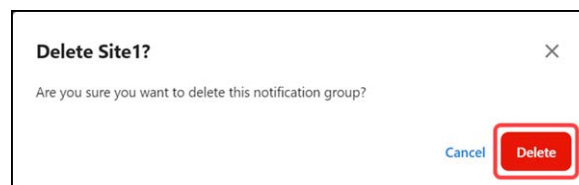
To edit or delete a notification group:

1. Select **Settings > Notification settings**. The 'Notification settings' screen appears with a list of existing notification groups.



'Notification settings' screen

2. Click the **pencil** to the right of the notification group to edit.
Make the **necessary edits** and click **Save** to save the changes. A success message appears and automatically dismisses.
3. Click the **trash can** to the right of the notification group to delete. A message appears confirming you want to delete the notification group.



Delete confirmation message

4. Click **Delete** to confirm.

Viewing a notification sent to you

If you opted to send an in-app notification, the bell-shape icon at the top-right corner of the dashboard highlights to let the recipient know a notification is sent.

An in-app notification contains the following:

- **Priority** - Indicates the severity of a notification as either normal or high priority. Use a normal priority for when the stock of an inventory item is running low and requires no action from the manager. Use a high priority for when an inventory item is completely depleted and a manager must mark the notice as read. High priority notifications always appear above all normal priority notifications.
- **Time** - Indicates the time when the notification is received, such as 2m ago (two minutes ago) or 2d ago (two days ago).
- **Mark read** - Indicates the notification is read without opening.
- **Mark unread** - Indicates the notification is not read.
- **Delete** - Deletes the notification.

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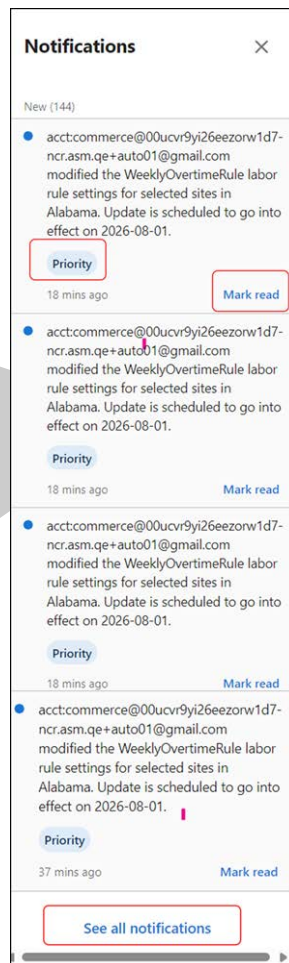
To view a notification:

1. Sign in to **Aloha Smart Manager**.



Notifications Icon

2. Click the **bell** in the top-right corner of the screen. The **Notifications** drawer appears.



Notifications Drawer

3. Click **Mark read** to mark a notification as read.

- (Optional) Click **See all notifications** to view the remaining notifications. The 'All notifications' screen appears.



All notifications

- Click **Mark all as read** to mark all notifications as read.
- Click **Delete** on any notification to delete the respective notification.

About Labor

The Labor module allows managers to effectively manage restaurant employees. You can maintain employee records, schedule work hours for employees, and configure jobs.

This module also allows you to effectively manage the business, optimize the workforce, improve productivity, and provide better customer service.

Some key areas of the Labor module include:

- **Employees** — Provides access to employee information, such as personal information and emergency contacts, and to assign jobs and pay rates to employees.
- **Schedule** — Creates schedules that balance employee availability and business needs to ensure adequate staffing levels are maintained while minimizing labor costs.
- **Shift tracker** — Displays the scheduled shifts for one selected day. It is a tool for managers to track the schedules of the employees on that particular day.
- **Punch summary** — Allows you to add new punches, based on your needs. Also, you can adjust a punch for any modifications to the clock-in, clock-out and punch reason.
- **Reports** — Provides a report that allows you to view the employees at risk of working overtime for the scheduled week and another report that allows you to view employee payroll information for a selected pay period.

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Working with employees

Select Labor > Employees to manage employee data, employment statuses, assign jobs, configure POS access and permissions, and more.

Employees

Here you can manage employee data, employment statuses, and POS access and permissions.

Employees must have an active user account to be an employee in Aloha Smart Manager. To track invitation status and manage account access, visit [NCR Identity](#).

Active Pending (4) Inactive Invite new employee

Name	Employee POS ID	Phone number
Petra Harris		
AT Bartender v1.12		
AT Employee v1.12		
AT Assistant Manager v1.12		
AT Manager v1.12		

'Employees' screen



Tip

The count of employees needing approval from a manager appears next to the Pending tab name. For example, if 'Pending (8)' appears, then eight employees require manager approval. Employee POS ID imports from the POS system with which you integrate, currently Aloha Cloud Back Office.

- **Active tab**— Appears by default and displays employees who are actively working in the restaurant. An employee becomes Active only after the manager approves the employee profile in the system.
- **Pending tab** — Displays new recruits awaiting approval from the hiring manager. If the profile status shows 'Completed,' all details of the employee are populated in ASM, but are still awaiting manager approval. If the profile status shows 'Incomplete,' some mandatory details of the employee are not yet available in ASM. Only after you enter all details and obtain manager approval will the corresponding employee become eligible to work and the status change to 'Completed.' This enables the 'Active' button. Once you click it, the employee moves to the Active tab and allows them to appear on the schedule.
- **Inactive tab**— Displays employees who are no longer associated with the restaurant. Reactivate employees, as needed.

Onboarding a new employee

When a new employee is hired at a restaurant, a manager can invite the new hire to enter their details into Aloha Smart Manager. There are multiple steps required when adding a new employee and these steps must be performed in the following order:

- [Step 1: Hiring manager creates a new employee](#)
- [Step 2: Employee opens Welcome email and completes the new employee setup](#)
- [Step 3: Hiring manager activates the employee](#)

Step 1: Hiring manager creates a new employee

In the first step, a hiring manager accesses the 'Employees' screen in ASM and creates a new employee.



Reference

If you experience problems logging in, refer to the [NCR Identity Quickstart Guide](#) for more information.

1. Select **Labor > Employees**. The 'Employees' screen appears.

Name	Employee POS ID	Phone number
Roxy Reynolds	1234	+1 20255523231
Harry Floeter	10001	4488990066
Satya krishnamraju Avvari		
Mohammed Ehideen Ali Syed	10003	
Lokesh Kalyan	145154	+1 (222) 661-2345
LeellaKrishna NaralaSetty		
priyanka didigam		
CREATEDUSER MANAGER1		

'Employees' screen

2. Click **Create new employee**. You are redirected to NCR Identity and the 'Create User' screen appears with the Basic information group bar expanded.

Create User

In order for users to gain full functionality in applications please assign permissions and location access.

Basic information

* Indicates required fields

First name *

Last name *

Email *

Date of birth

Phone number

Permissions

Location access

Local device login

Address

Cancel Create user

'Create User' screen in NCR Identity

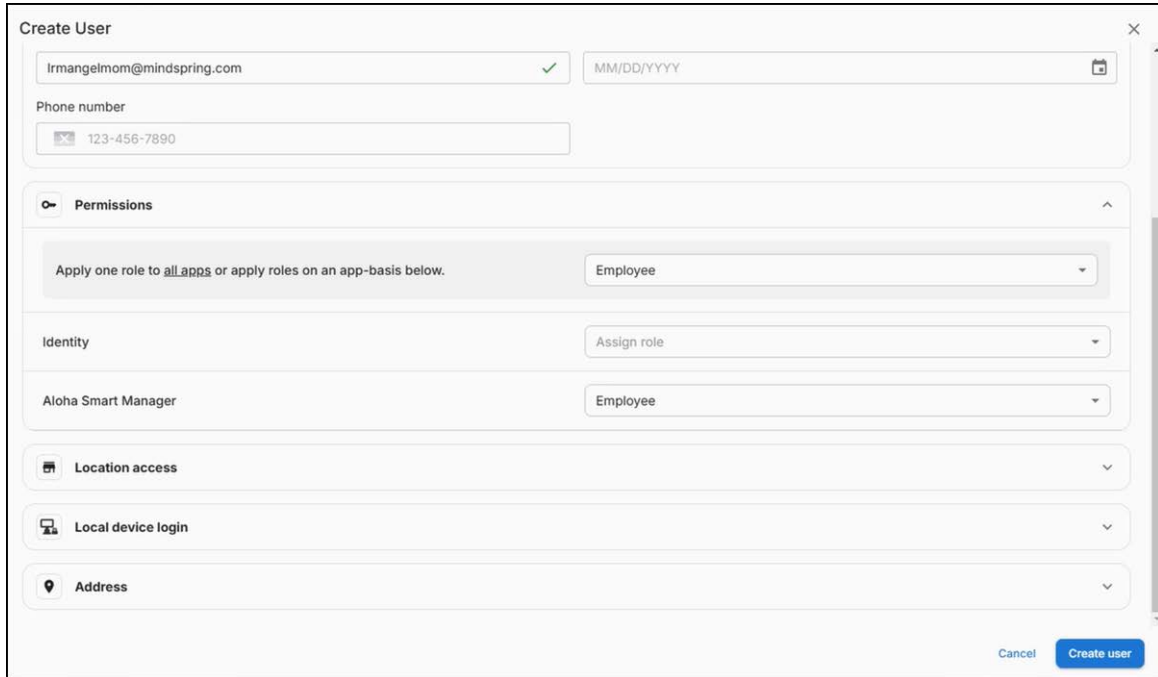
3. Type the **first and last name** of the new employee.
4. Type a valid **email address** for the new employee. ASM uses this email address to send a welcome email to the employee.

Warning

If the email address you enter is not valid, the employee is not able to complete the process and you will have to delete the new employee and start over.

5. If the employee you are adding is an in-store employee only, continue to step ??? to establish the PIN the employee is to use when logging in to the POS; otherwise, continue to the next step.

- Expand the **Permissions group bar**. The hosted applications to which you have access appear. In the example below, you see Identify and Aloha Smart Manager. Use the Permissions group bar to establish the role the user you are creating is to perform for each of the hosted applications.



The screenshot shows a 'Create User' dialog box. At the top, there are fields for email (irmangelmom@mindspring.com), a date (MM/DD/YYYY), and a phone number (123-456-7890). Below these is a 'Permissions' section with a minus sign icon and an upward arrow. The first row in the permissions section has a dropdown menu with the text 'Apply one role to all apps or apply roles on an app-basis below.' and 'Employee' selected. Below this are several rows, each with a label and a dropdown menu: 'Identity' with 'Assign role', 'Aloha Smart Manager' with 'Employee', 'Location access', 'Local device login', and 'Address'. At the bottom right of the dialog are 'Cancel' and 'Create user' buttons.

'Permissions' screen

- Select **one role** to apply to all hosted applications to which the employee is to have access, or assign a **specific role** the employee is to perform for each hosted application. If the employee is in-store only and you do not want them accessing the hosted application for any reason, do not make a selection; however, selecting Employee for Aloha Smart Manager allows the in-store employee to log in and view their schedule and change their personal information. Any employee for which you make a selection here receives a Welcome email to which they need to respond to complete their account creation.

8. Expand **Location access**.

The screenshot shows the 'Create User' form with the following details:

- Identity:** Aloha Smart Manager
- Assign role:** Employee
- Location access:** 1 site selected. The selected site is 'ASM Lab 491 441 QS' (ID: 63fe3c19fe8a461eba3f7e9fbc9a8f04).
- Local device login:** (Collapsed)
- Address:** (Collapsed)

'Location access' screen

9. Select the **sites** to make available to the user account.
10. Expand **Local device login**.

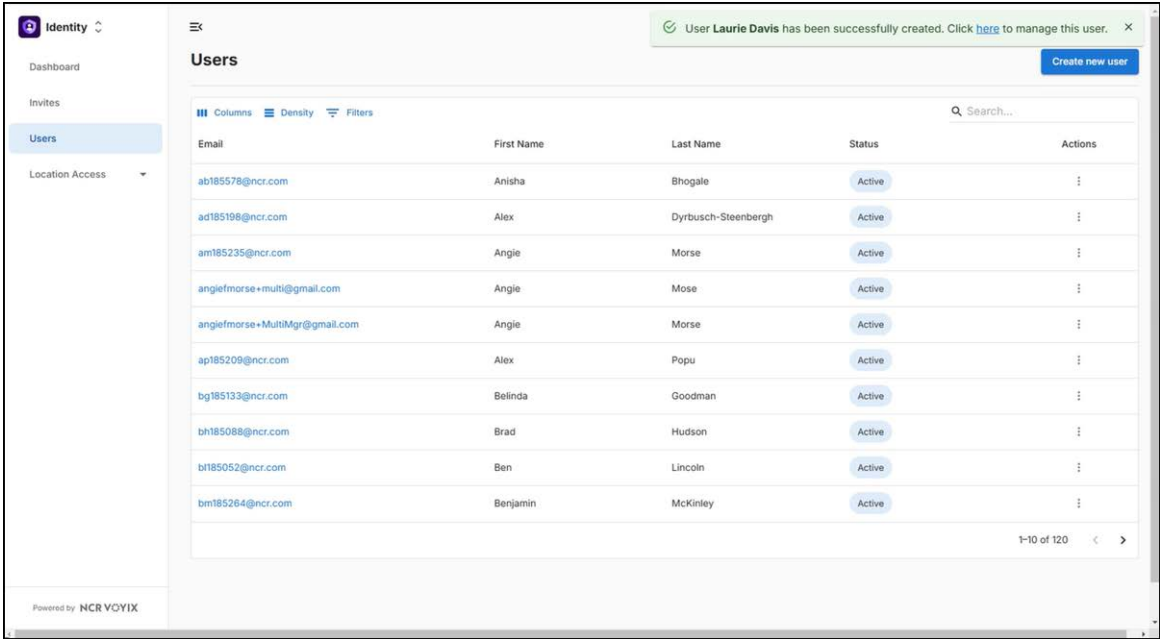
The screenshot shows the 'Create User' form with the following details:

- Message:** In order for users to gain full functionality in applications please assign permissions and location access.
- Basic information:** (Collapsed)
- Permissions:** (Collapsed)
- Location access:** (Collapsed)
- Local device login:** Expanded. The 'Device login' field contains '14789' and is highlighted with a red box.
- Address:** (Collapsed)

Establish POS login PIN

11. Type the **unique PIN** for the employee to use when logging in to the POS into 'Device login.'

12. Click **Create user**. A success message appears.

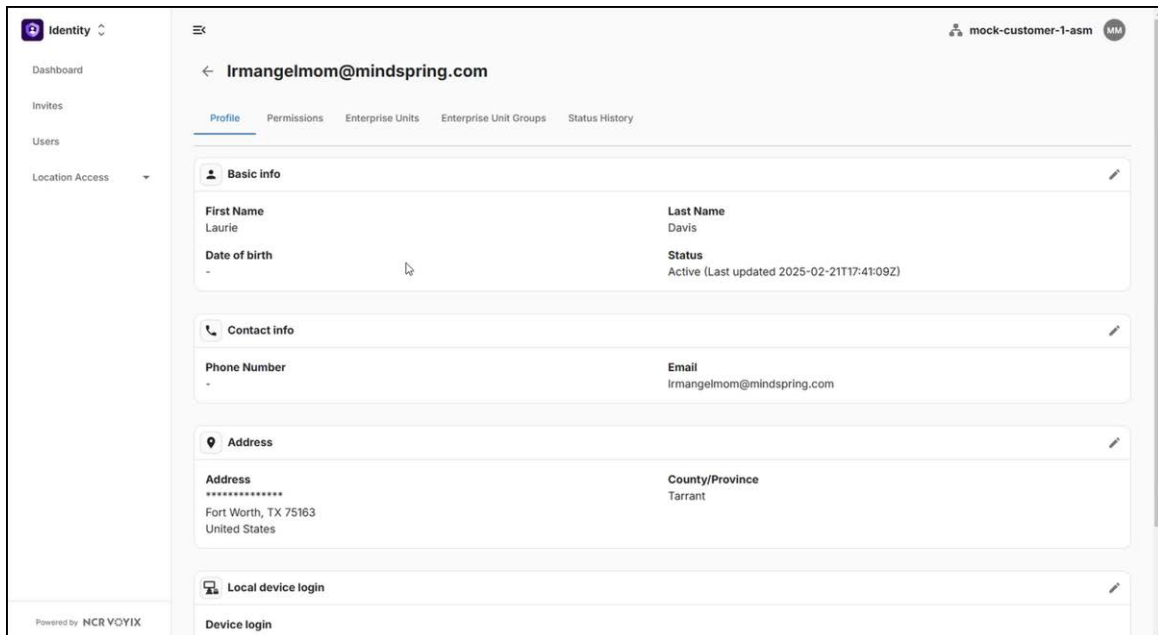


'Create user' success message

Note

If there is an existing employee with the same first and last name, a warning message appears when you attempt to save the new employee record.

13. If you click the **link** in the success message, the following screen appears.



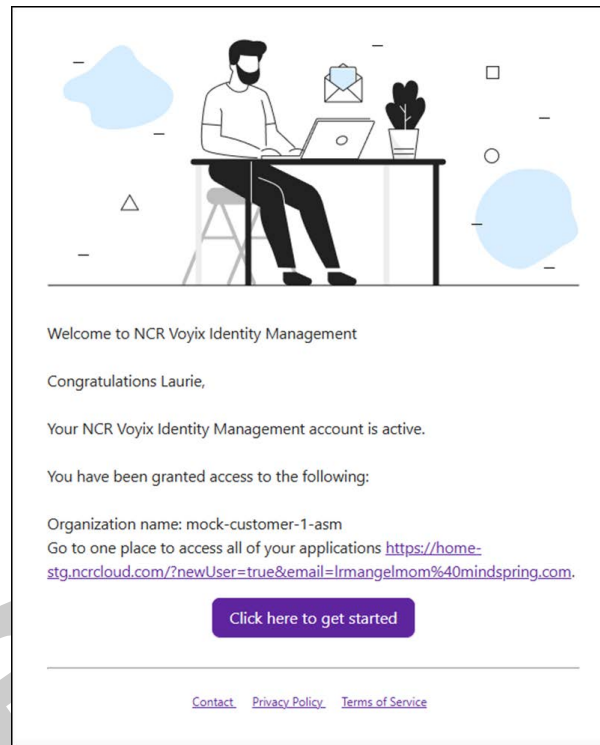
Employee information summary screen

Upon submission, an email is sent to the provided email address with a link for the employee to enter their personal information and emergency contact details. You can monitor the progress on the 'Employee registration home' screen. The status changes to 'Completed,' when all information has been provided.

Step 2: Employee opens Welcome email and completes the new employee setup

When the hiring manager creates a new employee record for which the employee is being given access to the Aloha Smart Manager hosted application, the new hire receives a welcome email with a link to access the specific organization in ASM.

1. Open the **Welcome email**.



Welcome email

2. Within the email text, click **Click here to get started**. The 'Create your NCR account' screen

appears.

NCR VOYIX

Sign up

Email
Irmangelmom@mindspring.com

First name Optional
Laurie

Last name Optional
Davis

Display name Optional
Laurie

Sign Up

[Already have an account?](#)

'Sign up' screen

3. Type your **email address, first name, last name, and the name you want to appear on the POS terminal**, and click **Sign Up**. The 'Set up security methods' screen appears.


NCR VOYIX


Set up security methods

📧 Irmangelmom@mindspring.com

Security methods help protect your NCR account by ensuring only you have access.

Set up required

 **Email**
Verify with a link or code sent to your email

 **Password**
Choose a password for your account

[Back to sign in](#)

'Set up security methods' screen

4. Click **Set up** under Password to choose a password for your account.

NCR VOYIX

Set up password

lrmangelmom@mindspring.com

Password requirements:

- At least 12 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Password can't be the same as your last 10 passwords

Enter password

Re-enter password

Sign In

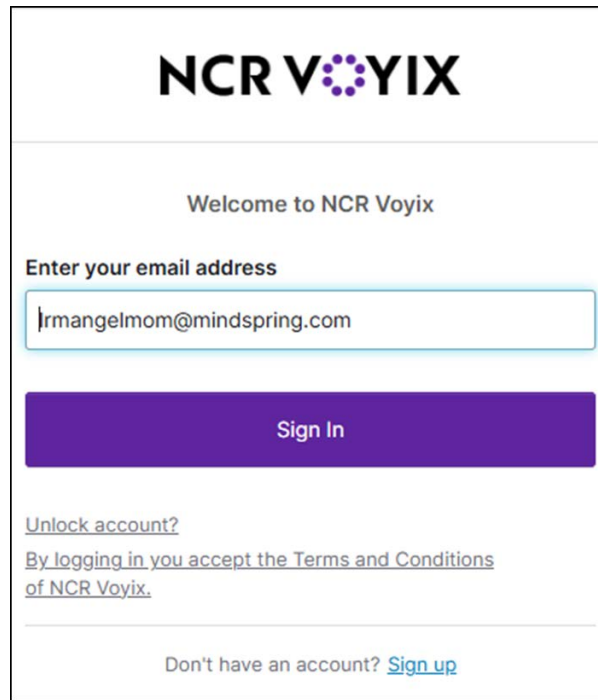
[Return to authenticator list](#)

[Back to sign in](#)

'Set up password' screen

5. Type the **password** in 'Enter password' and again in 'Re-enter password,' ensuring the password meets the password requirements.

6. Click **Sign In**. The Welcome to NCR Voyix login screen appears.



'Welcome to NCR Voyix' Sign In screen

7. Type your **email address** and click **Sign In**. The password screen appears.
8. **Type your password**. The 'My information' screen appears.

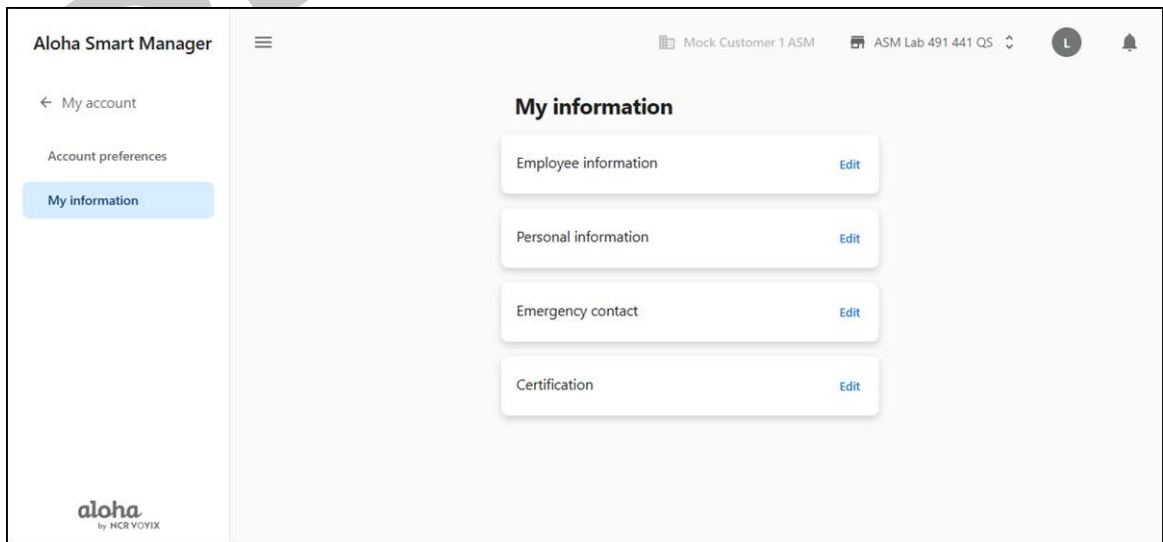


Figure 1 - 1 'My information' screen

9. Continue to the **next procedure** to enter your employee information.

To enter employee information:

1. Under the 'My information' group bar, click **Edit** to the right of 'Employee information' to display the following screen.

The screenshot shows a web interface for editing employee information. The title is 'Employee information'. The form contains the following fields and values:

- First name*: Laurie
- Middle name: (empty)
- Last name*: Davis
- Preferred name*: Laurie
- Email address*: lmangelmom@mindspring.com
- Phone number: 8175551212
- Alternate phone number: (empty)

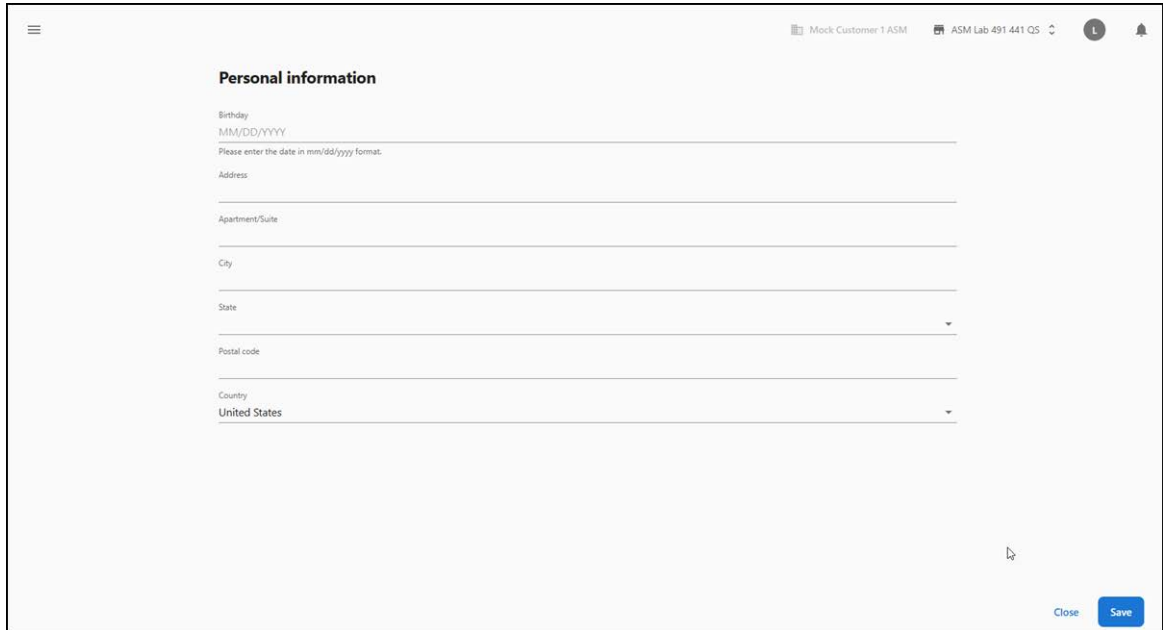
At the bottom right, there are 'Close' and 'Save' buttons.

'Employee information' screen

2. Under the 'Personal information' group bar, verify your **first name, middle name, and last name**.
3. Type your **preferred name**. Use this option to use an abbreviated employee name or a nickname on the chit and guest check. If left blank, ASM uses your first name.
4. Verify your **email address**.
5. Type your **phone number** and an **alternate phone number**, if you have one.
6. Type your **birthday** in 'MM/DD/YYYY' format.
7. Click **Save**.
8. Click **Close** to return to the 'My information' screen.
9. Continue to the **next procedure**.

To enter your personal information:

1. Click **Edit** to the right of 'Personal information.'

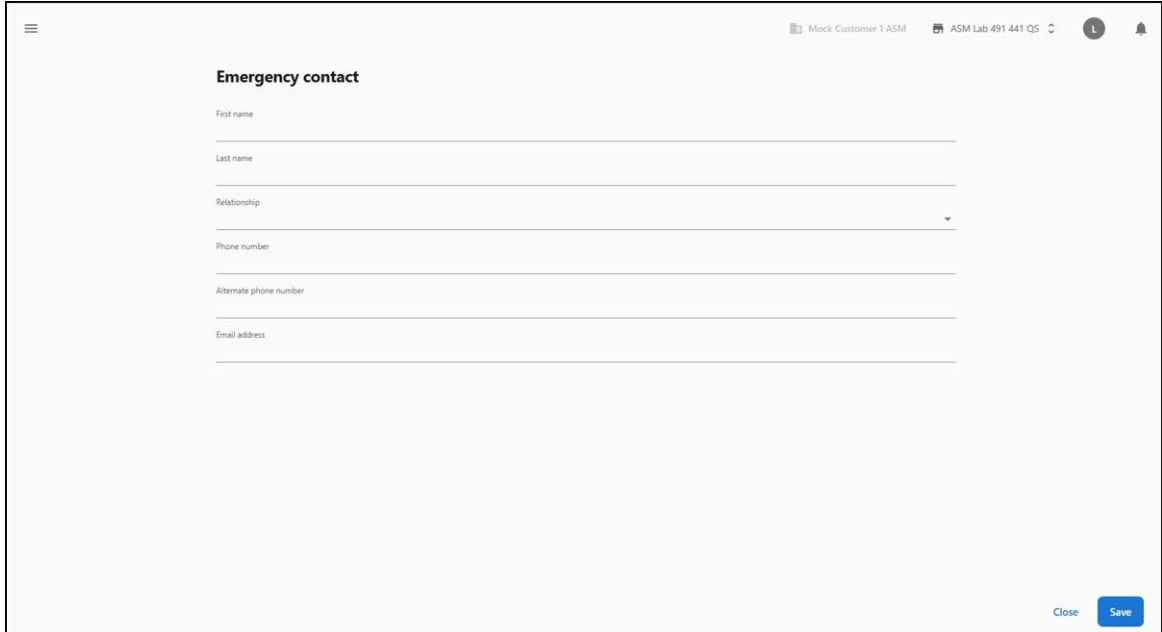
A screenshot of a web application interface showing a 'Personal information' form. The form is titled 'Personal information' and contains several input fields: 'Birthday' (with a placeholder 'MM/DD/YYYY' and a note 'Please enter the date in mm/dd/yyyy format.'), 'Address', 'Apartment/Suite', 'City', 'State' (a drop-down menu), 'Postal code', and 'Country' (with 'United States' selected). At the bottom right of the form, there are two buttons: 'Close' and 'Save'.

'Personal information' screen

2. Type your **street address, city,** and **postal code.**
3. Select the **state of residence** from the drop-down list.
4. Select the **country of residence.**
5. Click **Save.**
6. Click **Close** to return to the 'My information' screen.
7. Continue to the **next procedure.**

To enter emergency contact details:

1. Click **Edit** to the right of 'Emergency contact.'



The screenshot shows a web interface for entering emergency contact details. The form is titled "Emergency contact" and includes the following fields: "First name", "Last name", "Relationship" (a dropdown menu), "Phone number", "Alternate phone number", and "Email address". At the bottom right of the form, there are two buttons: "Close" and "Save". The interface also shows a user profile icon and a notification bell in the top right corner, and a breadcrumb trail: "Mock Customer 1 ASM" > "ASM Lab 491 441 QS".

'Emergency contact' screen

2. Type the **first name** and **last name** of your emergency contact.
3. Select the **relationship** of the emergency contact to you from the drop-down list.
4. Type the **phone number** of the emergency contact.
5. Type an **alternate phone number** of the emergency contact. This field is optional.
6. Type the **email address** of the emergency contact.
7. Click **Save**.
8. Click **Close** to return to the 'My information' screen.
9. Continue to the **next procedure**.

To enter certification details:

1. Click **Edit** to the right of 'Certification.'

The screenshot shows a web interface for entering certification details. The title is "Certification". There are three input fields: "Certification name" (containing "Liquor"), "Certification number" (containing "TABC"), and "Expiration date" (containing "12/30/2026"). A note below the date field says "Please enter the date in mm/dd/yyyy format." The top right of the interface shows "Mock Customer 1 ASM" and "ASM Lab 491 441 QS". At the bottom right, there are "Close" and "Save" buttons.

'Certification' screen

2. Enter the **certificate number** of the license.
3. Type the **date** when the certification expires.
4. Click **Save**.
5. Click **Close** to return to the 'My information' screen. You have now completed the onboarding process.
6. Click your **profile icon** in the top right corner of the screen and select **Logout** to exit Aloha Smart Manager.

Step 3: Hiring manager activates the employee

Once the employee completes their onboarding tasks, you must assign at least one job to the employee and activate the employee.

1. Select Labor > Employees. A list of active employees appears.

The screenshot displays the 'Employees' management interface. At the top, there are navigation tabs for 'Active', 'Pending (20)', and 'Inactive'. A 'Create new employee' button is located in the top right corner. Below the tabs is a table with the following data:

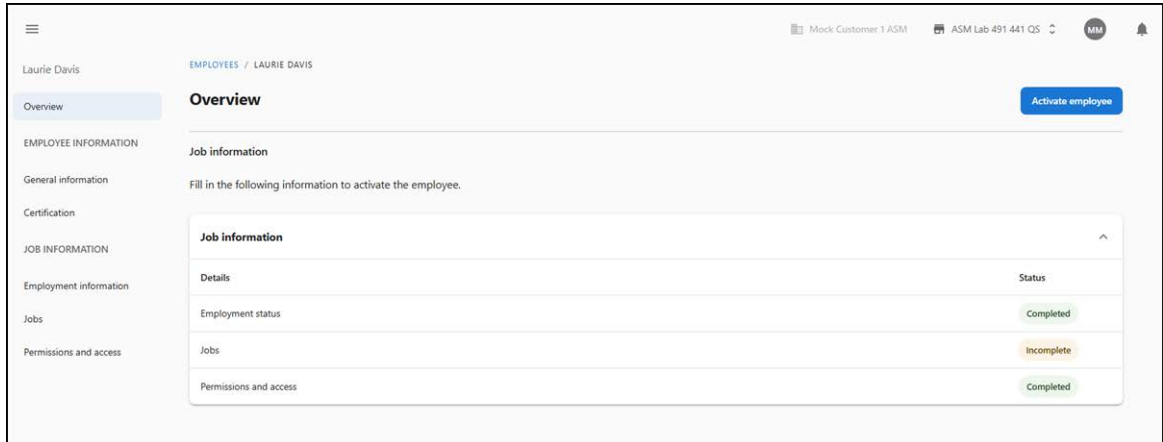
Name	Employee POS ID	Phone number
Roxy Reynolds	1234	+1 20255523231
Harry Floeter	10001	4488990066
Satya krishnamraju Avvari		
Mohammed Ehideen Ali Syed	10003	
Lokesh Kalyan	145154	+1 (222) 661-2345
LeellaKrishna NaralaSetty		
priyanka didigam		
CREATEDUSER MANAGER1		

At the bottom right of the table, it shows 'Rows per page: 10' and '1-8 of 8'.

Active employees

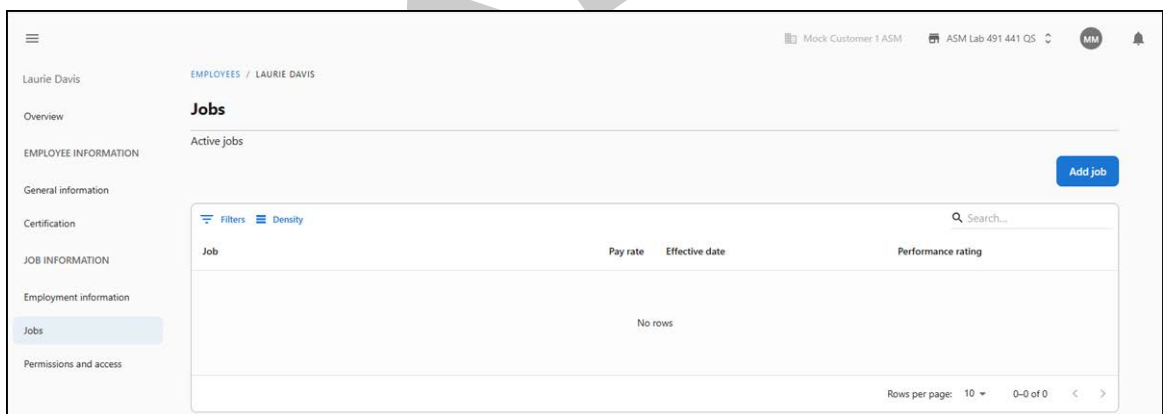
2. Select the **Pending** tab to view the list of employees in the Pending status.

3. Select the **employee** to activate. If necessary, use the **Search** text box to assist you in locating the employee. At this time, the only thing that should be incomplete for the employee is the Jobs information.



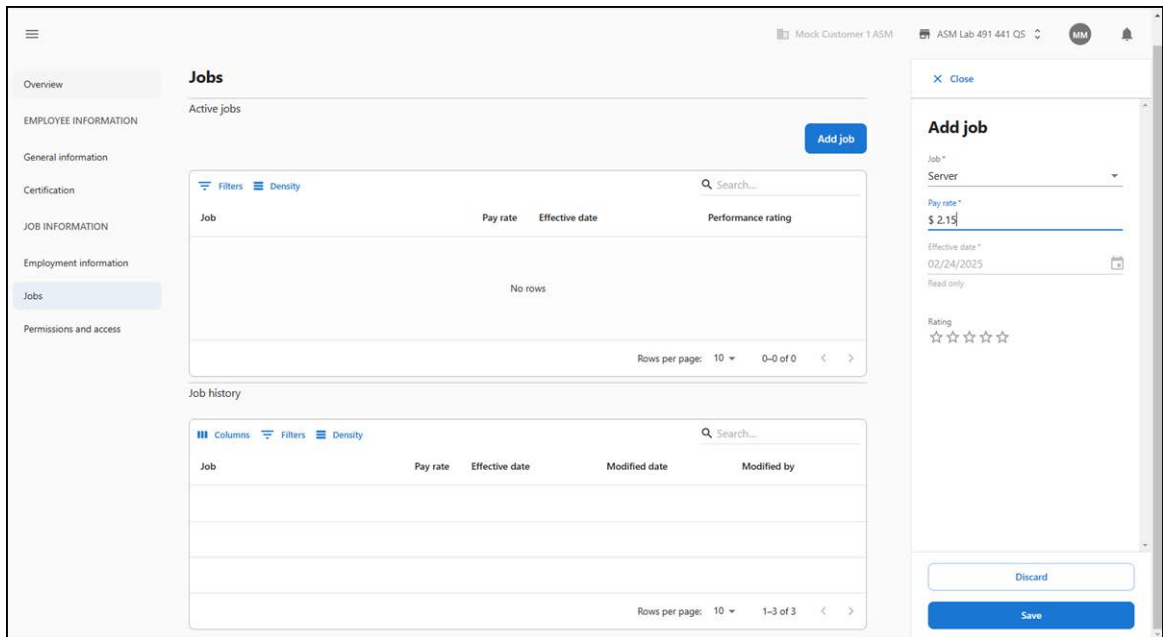
'Overview' screen

4. Under the JOB INFORMATION heading on the left, click **Jobs**.



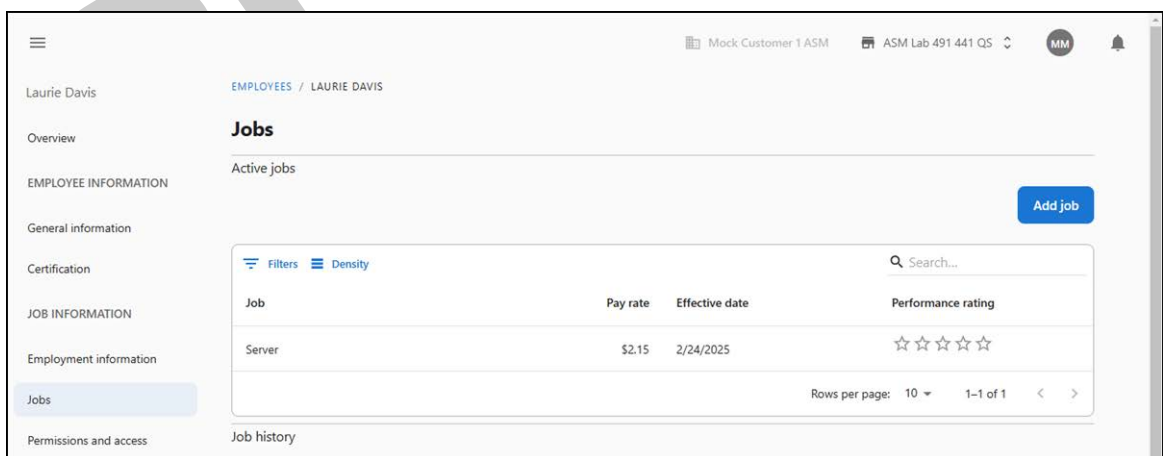
'Jobs' screen

5. Click **Add job**. The Add job screen appears on the right side of the screen.



'Add job' screen

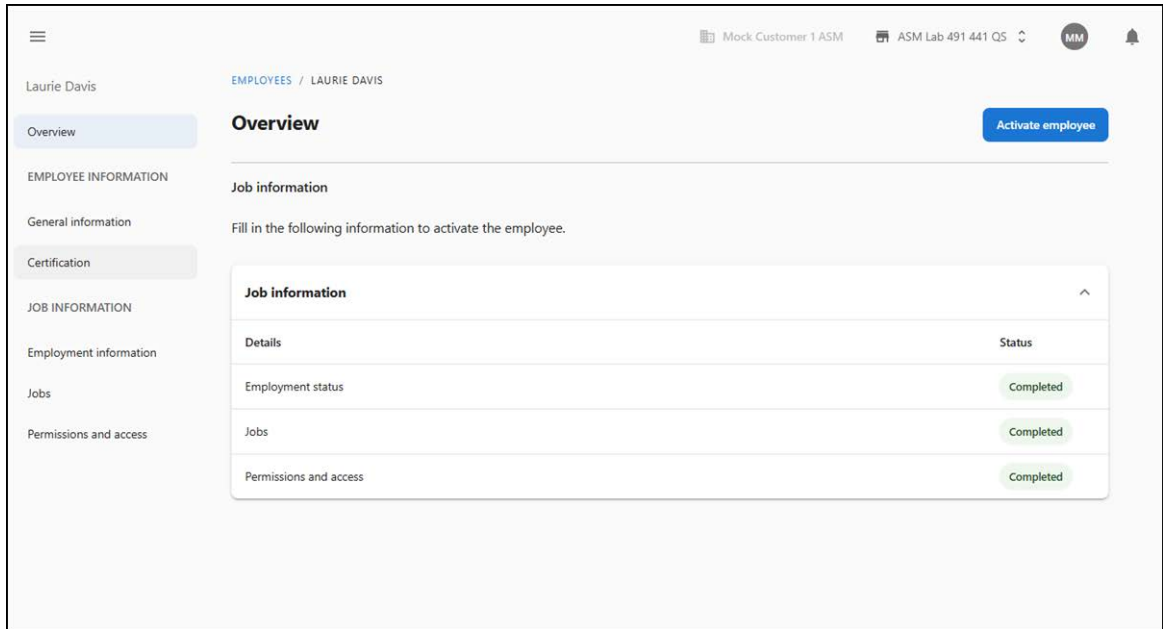
6. Select the **job** to assign the employee from the 'Jobs' drop-down list.
7. Type the **rate of pay** the employee will earn when working this job.
8. Click **Save**. A success message appears and the job appears as assigned to the employee.



Job added

9. Repeat steps **5** through **8** until you assign all applicable jobs to the employee.

10. When all applicable jobs are added, click **Overview** on the left. The Jobs status now appears as Completed.



Activate employee

Click **Activate employee** to complete the onboarding process. If required, you can change the status later. For more information, refer to [Managing employment statuses on page 44](#).

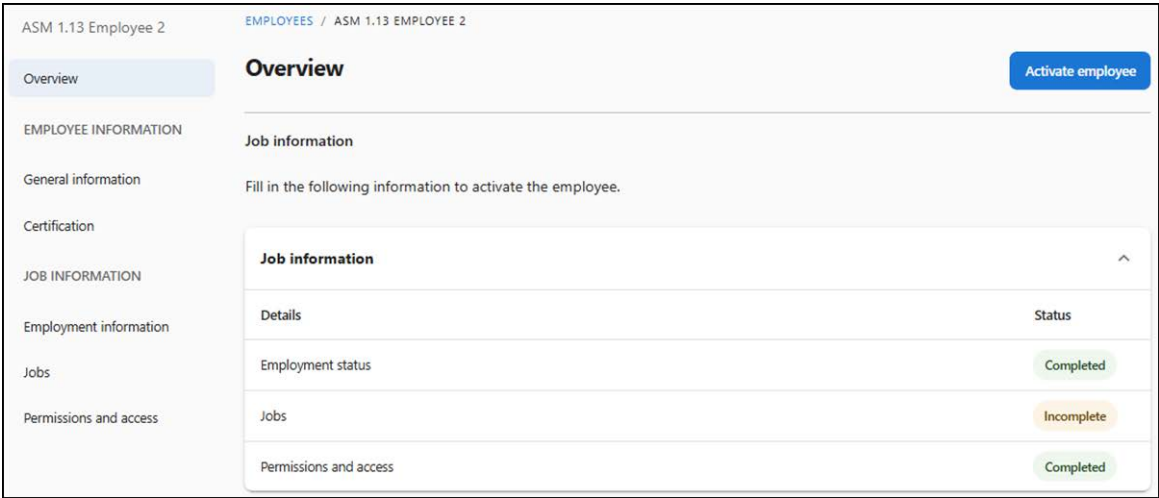
If a pending employee is no longer available for hire, for reasons such as the employee decided to work elsewhere, you can delete the employee. (Check once)

Granting permissions and access

You can grant permissions related to POS access and security options based on the requirement of the role and responsibilities performed by an employee.

To grant permissions and access:

- 1. Select **Labor > Employees**. The Employees screen appears.
- 2. Select the **employee** from the Active tab. The 'Overview' screen appears.



Employee permissions and access

3. Under the JOB INFORMATION heading on the left, click **Permissions and access**. The 'Permissions and access' screen appears.

EMPLOYEES / PETRA HARRIS

Permissions and access

POS access

Employee POS ID

Prefers QWERTY keyboard

POS security options

Use magnetic cards

Use fingerprint scanner for clock-in

Use fingerprint scanner for login and manager approval

Cancel Save

Permissions and access

4. Under the POS access group bar, type the **Employee POS ID**.
5. Select Prefers QWERTY keyboard to indicate the employee prefers the standard QWERTY typewriter keyboard. Clear this option to display an alphabetic keyboard layout. These keyboards appear on order entry touch screens for data entry, such as typing the name for a bar tab. Employees who know how to type usually prefer the QWERTY layout.
6. Under the POS security options group bar, configure the following options:

Use magnetic cards — Requires the employee to use a magnetic card when logging in to the FOH, and when accepting credit cards for payment. The employee cannot manually enter their password or credit card numbers. Although an employee can use a mag card if you clear 'Use magnetic cards,' you must select this option to require an employee to use their mag card with the Aloha POS system.

Use fingerprint scanner for clock-in — Requires the employee to place their thumb on fingerprint scanner hardware to clock in. Use this option for employees who must clock in, but do not enter orders, such as kitchen staff.

Use fingerprint scanner for login and manager approval — Requires employees to place their thumb on fingerprint scanner hardware to log in or to obtain manager approval on certain transactions. Use this option for order entry employees who log in frequently and for managers who must approve transactions

7. Click **Save**.

A confirmation message appears and automatically dismisses. The employee is given the required permissions and access in ASM.

DRAFT

Managing employment statuses

Based on your business needs, you can transfer out an employee, put an employee on leave of absence, and terminate an employee. You must provide an appropriate reason for leave of absence and termination status changes.

To view and change an employment status:

1. Select **Labor > Employees**. The 'Employees' screen appears.
2. Select the **employee** from the list. The 'General information' screen appears.

The screenshot shows the 'General information' page for an employee named Amelia Assistant Manager. The page is divided into several sections: 'Personal information', 'Contact information', and 'Job information'. The 'Employment information' tab is highlighted with a red box. The 'Personal information' section includes fields for First name (*), Middle name, Last name (*), Preferred name (*), and Birthday (MM/DD/YYYY). The 'Contact information' section includes fields for Phone number, Alternate phone number, Email address (*), Address, Apartment/Suite, City, Postal code, Country, and State. The 'Job information' section includes fields for Jobs and Permissions and access.

Employee overview

3. Under the 'JOB INFORMATION' heading on the left, select **Employment information**..

Amelia Assistant Manager EMPLOYEES / AMELIA ASSISTANT MANAGER

EMPLOYEE INFORMATION

General information

Certification

JOB INFORMATION

Employment information

Jobs

Permissions and access

Employment information

Job type
Full-time

Employment status *
Hired

Effective date *
01/13/2025

Export ID

The export ID can come from a payroll processor, HR system, or your company's internal numbering scheme.

'Employment information' screen

4. Select the **employment status** from the drop-down list.
Select **Hired** to indicate the employee is available for scheduling. Hired is the default status for active employees. You cannot change the 'Effective date' for employees on the Active tab.
Select **Leave of absence** to place an employee on leave of absence. You must select a **reason** and the anticipated **date of return**. The manager receives a notification indicating the anticipated date of return.

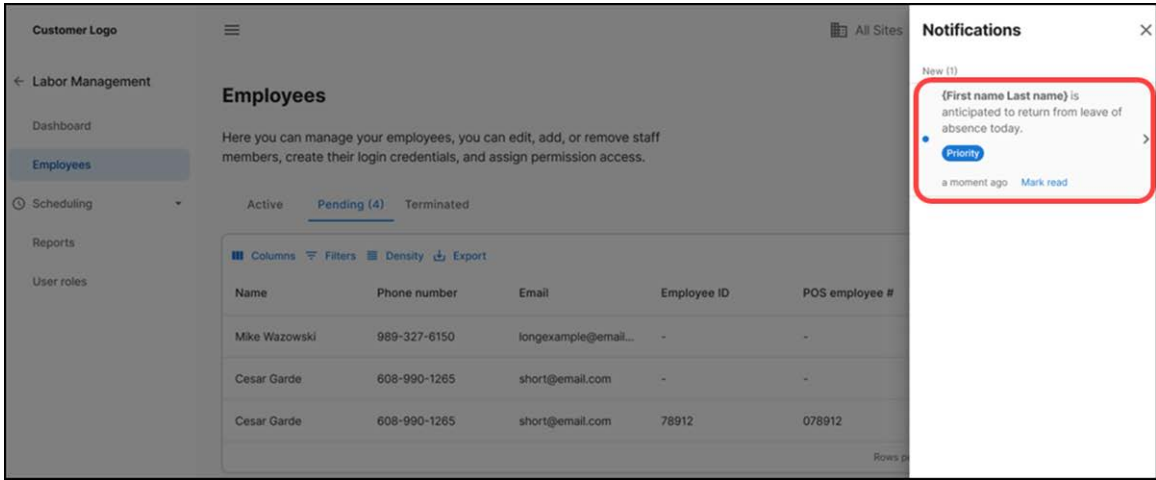
Employment status *
Leave of abse...

Reason *
Back to school
Medical leave
Military leave
Personal leave

Anticipated date of return *
MM/DD/YYYY

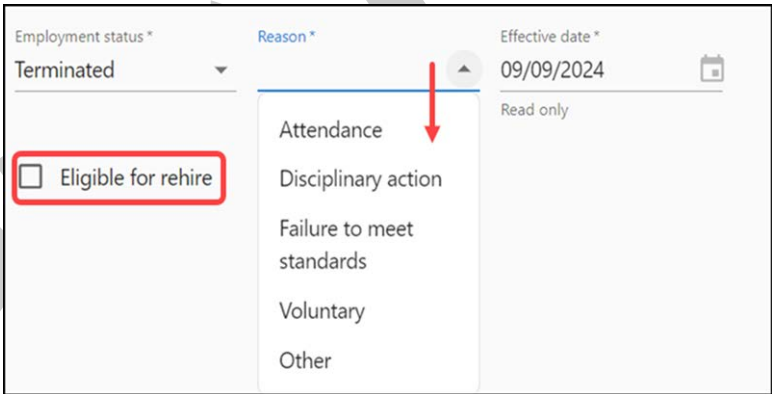
Export ID
123456

Employee leave of absence



Employee leave of absence notification

Select **Terminated** to indicate an employee is terminated. When you terminate an employee, you must provide a **reason** for the termination and the **date** on which the termination is effective. Select **Eligible for rehire** if you want to rehire an employee after termination.



Employee terminated

5. Click **Save** to save the changes to employment status.

Changing the pay rate for a job

When an employee receives a raise or a demotion, or any other reason that the pay rate changes, a manager can increase or decrease the pay rate tied to a specific job assigned to an employee.

To change the pay rate for an employee:

1. Select **Labor > Employees**. The 'Employees' screen appears.
2. Select the **employee** from the **Active** tab. The 'General information' screen appears.

Satya krishnamraju Avvari EMPLOYEES / SATYA KRISHNAMRAJU AVVARI

EMPLOYEE INFORMATION

General information

Certification

JOB INFORMATION

Employment information

Jobs

Permissions and access

General information

Personal information

First name* Satya krishnamraju Middle name Last name* Avvari

Preferred name* Satya krishnamraju Birthday MM/DD/YYYY

Contact information

Phone number Alternate phone number

Email address* sa185352@ncr.com

Address Apartment/Suite

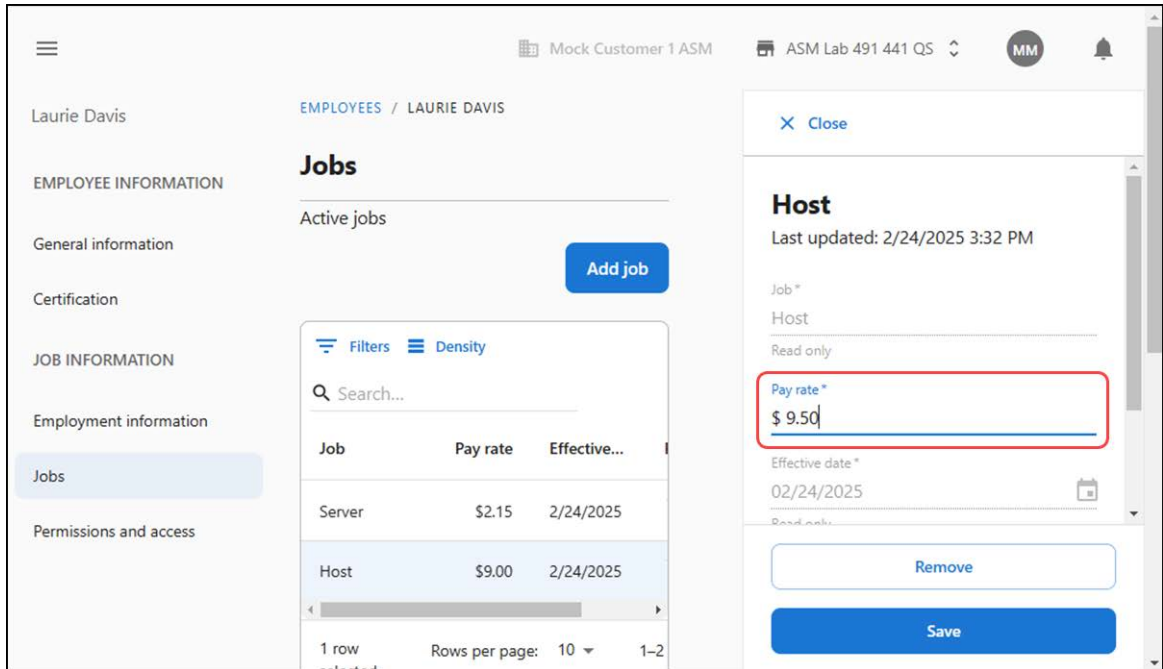
City Postal code

Country State

Changing pay rate

3. Under the 'JOB INFORMATION' heading, select **Jobs**. The jobs currently assigned to the employee appear.

4. Select the **job** that requires a pay rate change. The screen for the selected job appears on the right of the screen.



Changing pay rate for a job

5. Type the **new pay rate**.
6. Click **Save** to update the pay rate. The old pay rate and effective date appear in the job history table.

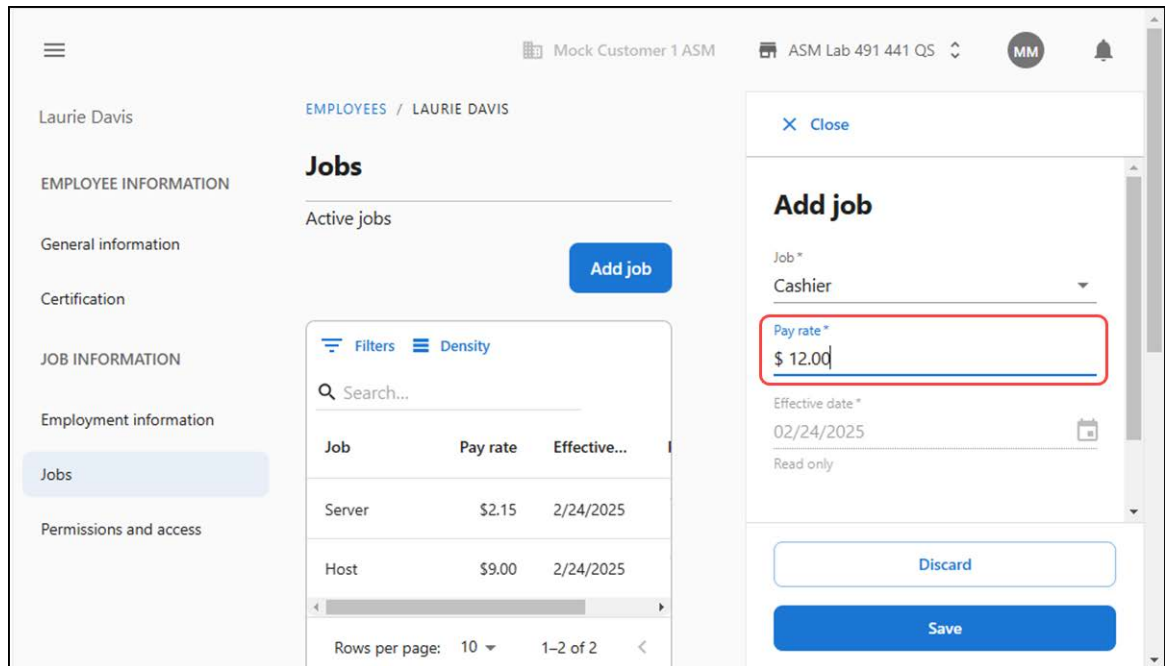
Assigning a job to an employee

To allow an employee to work in more than one job role, you must assign each job to the employee.

To assign another job to an employee:

1. Select **Labor > Employees**. The 'Employees' screen appears.
2. Select the **employee** from the **Active** tab. The 'General information' screen appears.
3. Under the 'JOB INFORMATION' heading, select **Jobs**. The 'Jobs' screen appears.

4. Click **Add job**. The 'Add job' screen appears on the right of the screen.



'Add job' screen

5. Select the **job** to assign the employee from the 'Job' drop-down list.
6. Type the **rate of pay** the employee will earn when working this job.
7. Click **Save**. A success message appears and the job is now assigned to the employee.

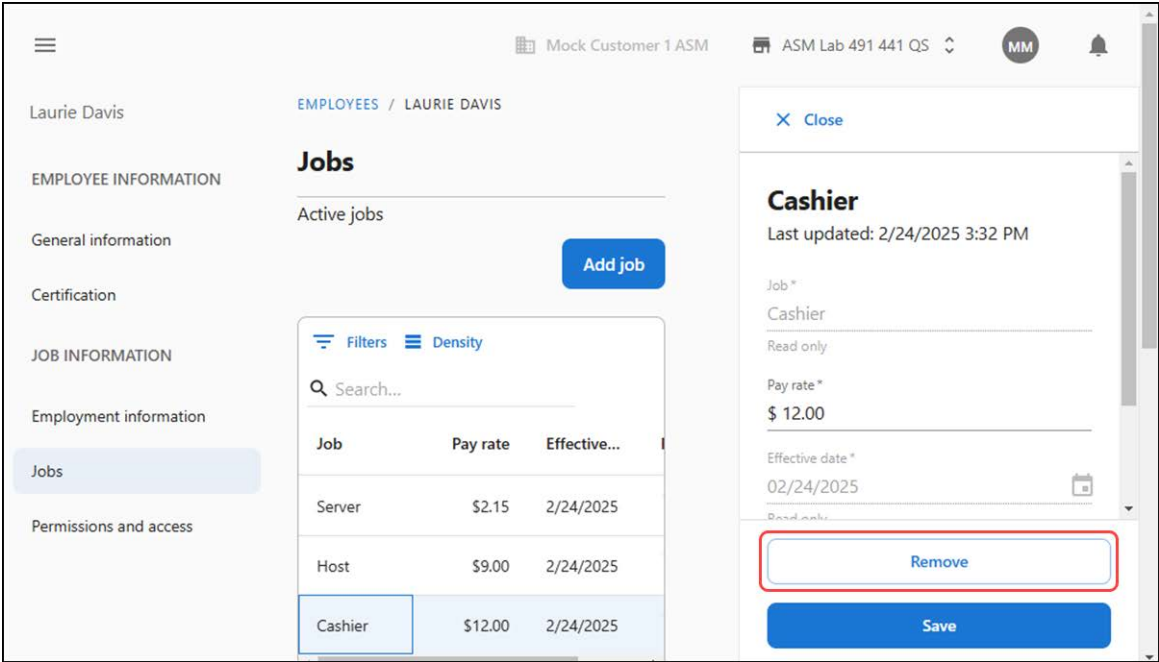
Removing a job from an employee

When the employee no longer works under a specific job, the manager can remove the job from their employee profile.

To remove a job from an employee:

1. Select **Labor > Employees**. The 'Employees' screen appears.
2. Select the **employee** in the Active tab. The 'General information' screen appears.
3. Under the 'JOB INFORMATION' heading, select **Jobs**. The 'Jobs' screen appears.

- 4. Select the **job** to remove from the list of 'Active jobs.' The job appears on the right side of the screen.



Removing a job

- 5. Click **Remove**. The employee is no longer assigned to the job.

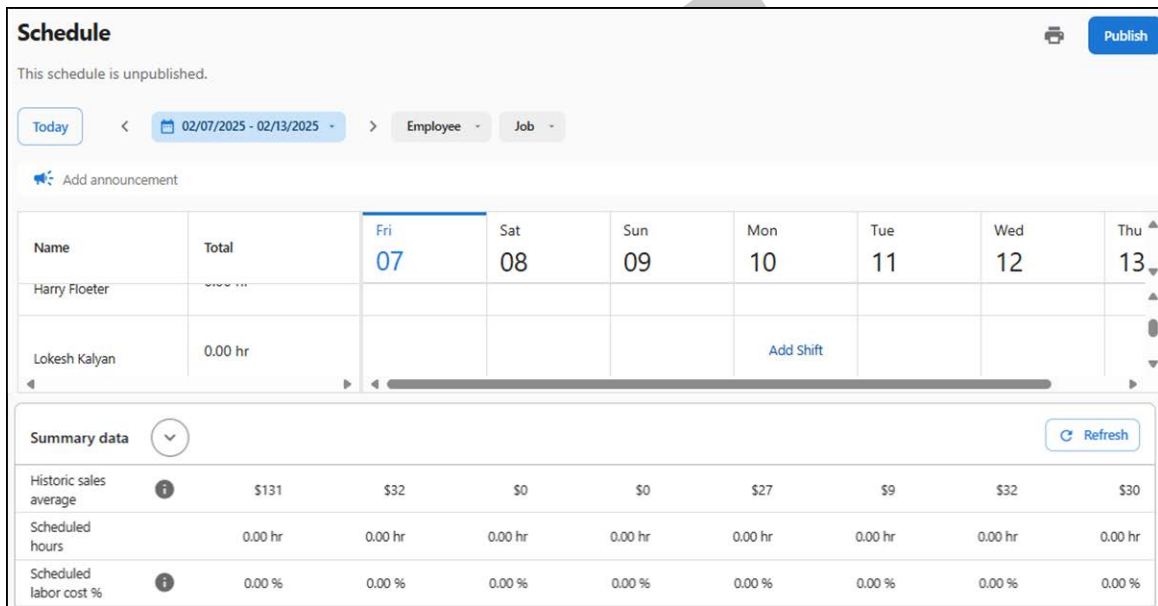
Working with schedules

Use Schedule to create schedules for employees to work for the current and future weeks, depending on business requirements. You can create, edit, and delete employee schedules to ensure the optimal utilization of resources and gain maximum productivity with ease.

The schedule is a calendar-based user interface that helps you view schedules of all employees within a single screen and allows you to schedule and view shifts for a specific day or multiple days of a week. The list of active employees appears under the 'Name' column and the total number of hours worked for the current week for that employee appears under the 'Total' column. For example, in certain jurisdictions, the organization must schedule shifts up to 14 days in advance. This helps you know which employees are assigned to a shift and their working hours.

Understanding the 'Schedule' screen

The following image () and table describes the 'Schedule' screen:



'Schedule screen

No	Description
Today	View the schedule for the current day (today).
Date picker	Navigate between weeks.
Calendar	Open the calendar control to select a week.
Employee	Select a specific employee to plan a schedule. You can scroll through the list of available employees who are assigned to the selected job or you type a specific employee name. Related Information: Ensure the manager has approved the employee record.

No	Description
job	Select a job. Upon selection, the employees assigned to the corresponding job appear in the schedule viewer. Related Information: Ensure the jobs are already defined in the 'jobs configuration' screen.
Add announcement	Add an announcement to a schedule.
Schedule viewer	Schedule viewer (calendar view of a specific week). The calendar view lists the following details: <ul style="list-style-type: none"> • Name of the employee for whom the shift is scheduled. • Total number of hours the employee has worked for the selected week. For example, if the employee has worked over the limit, the corresponding hours are highlighted in red. Additionally, upon hovering over the warning icon, the <i>Review the employee for the following: Part-time critical</i> message appears. • Week for which the shift is planned.
Adding a shift	Hover-over the calendar to view the Add Shift option. Use this option to create new shifts. Related information: To understand how to create shifts, see Adding a shift .
Cell in the Schedule table	Indicates the shift and job currently assigned to the employee.
Summary data	View the summary information for the past six weeks under Historic sales average, Scheduled hours, and Scheduled labor cost %.
Publish	Publish the shift calendar to employees.

Selecting a schedule week

The schedule includes the employee schedule data, so the manager knows who is working on each shift, what time they enter and leave and where in the restaurant they will be working.

A manager is able to create, view, publish, and print the weekly schedule based on the date selection. Also, ASM provides you with the weekly employee schedule which helps in calculating and displaying the daily/weekly hours by employee. This helps you to understand if you are properly distributing the hours to your employees and to meet staffing needs for the restaurant while adding employee weekly schedule shifts.

Also, you can view:

- The historical net sales average in the associated day-of-week (column) this helps as a reference while scheduling.
- A weekly total of historical net sales, this helps in understanding your average total sales and the labor percentage, and you can decide if your scheduling meets your budget constraints.

1. Select **Labor > Schedule**. The 'schedule' screen appears.

Schedule
Last published 7/22/2024 by commerce@00ubrzsifax9tpom1d7-ncr.asm.qe+stg-yp-admin@gmail.com

Today < > 7/22/2024-7/28/2024 Job - Employee

This is to test

Name	Total	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26
Charles Joseph Max30Max:	10.00 hr	6:00a - 7:00a Cook	6:00a - 12:00p Server			
		9:00a - 12:00p				

Summary data

Historic sales average	Mon	Tue	Wed	Thu	Fri	Sat	Sun
	\$17,423	\$1,324	\$10,098	\$2,011	\$740	\$1,065	\$1,194
						\$988	

'schedule' screen

2. Perform **any** of the following to navigate to the schedule week:

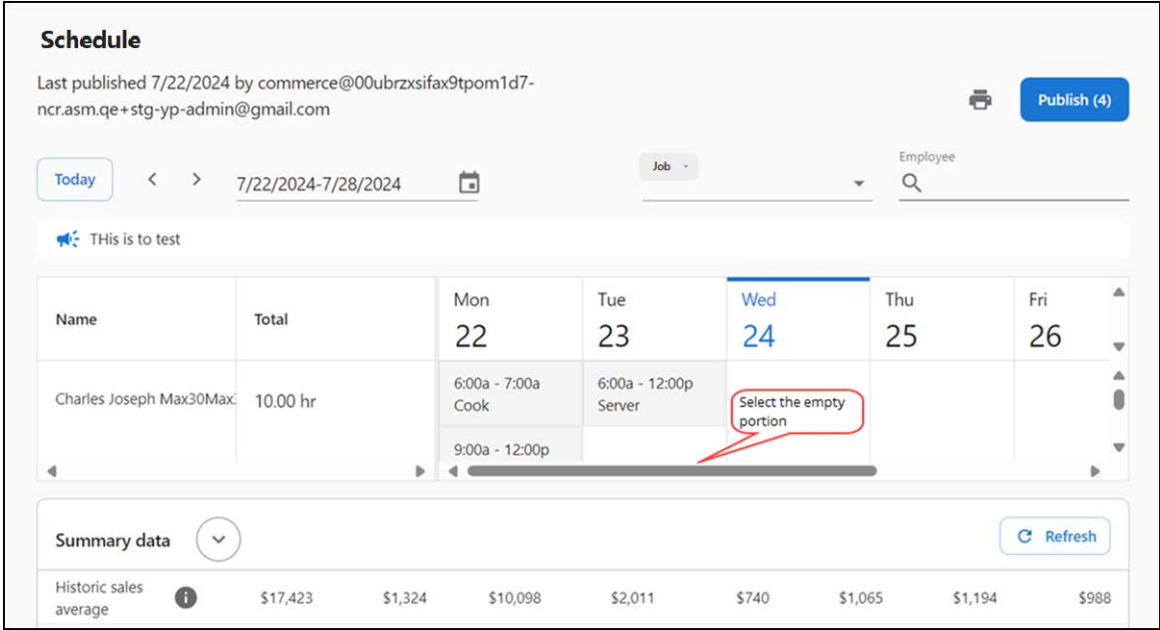
- Select **Today** to display the schedule for the current week with the current day selected. For example: If today is 'Wednesday,' the date range appears for the current week with Wednesday selected.
- Select **<** and **>** to move one schedule week at a time, forward or backward.
- Select the **range** from the calendar picker.

Adding a shift

A manager creates shifts and specifies the employees to work for the shift. When you create a shift, you select the job, define the shift timing, define the break timing, and add any additional information to communicate to the employee.

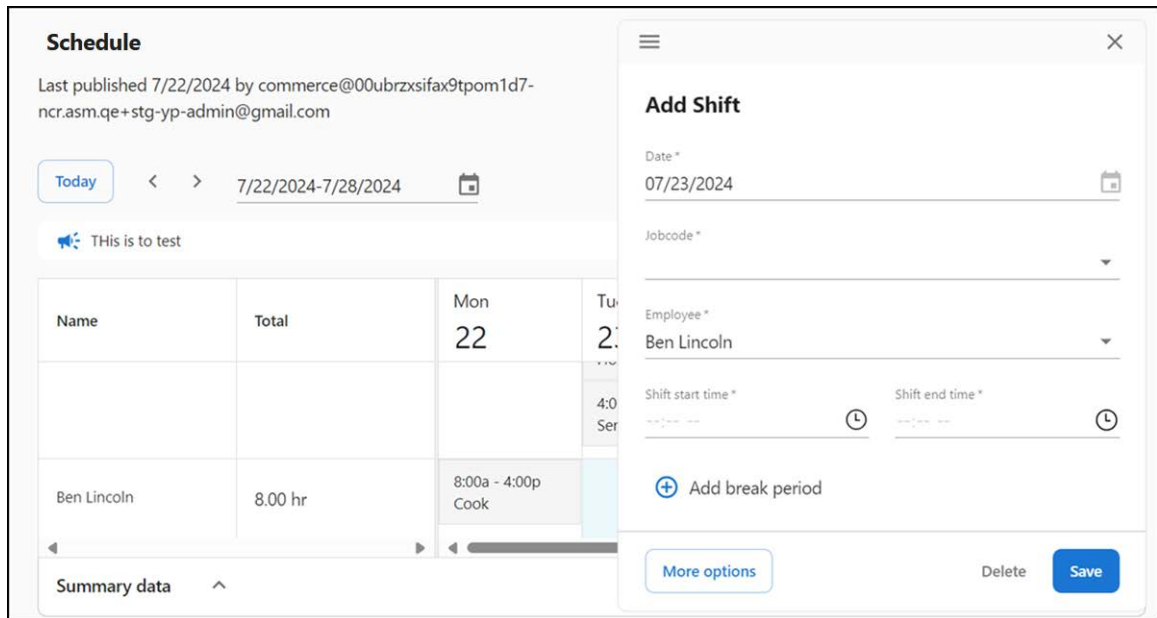
To add a shift:

- 1. Select **Labor > Schedule**. The 'Schedule' screen appears.



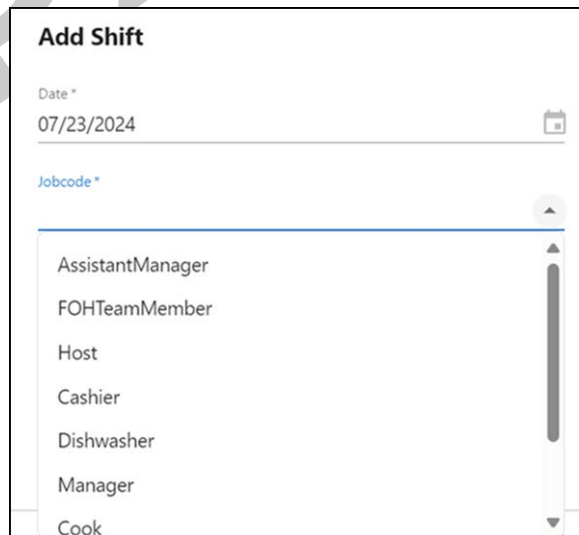
'Schedule' screen

2. Locate the **employee in the list**, hover over the **date** to the right, and click **Add Shift**. The 'Add Shift' screen appears on the right side of the screen with the selected date appearing by default.



'Add Shift' screen

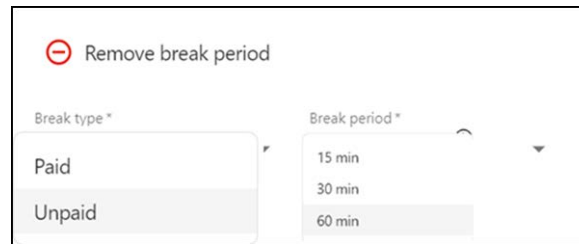
3. Select a **job** from the 'Job' drop-down list.



Job selection

4. Select the **start time** and **end time** for the shift using 15 minutes intervals (00, 15, 30, 45).

5. Click **Add break period**. This is necessary for regions that require employees to take breaks



Break type and period selection

6. Select one of the following **break types**:
 - Paid** — Employee is paid if the break is taken.
 - Unpaid** — Employee is not paid if the break is taken.
7. Select the **duration of minutes** for which the employee is allowed to take a break. The predefined break periods are 15, 30, and 60 (in minutes).
8. Enter the **start time** and **end time** for the break using 15 minute intervals (00,15, 30, 45).
9. If you need to add additional breaks, repeat **steps 5 through 8**.



Note

Click **Remove break period** to remove any breaks you added.

- 10. Click **More options** to enter any notes to communicate to the employee, such as 'You're working the VIP room for this shift so look sharp.'
- 11. Click **Save**. The shift is added to the schedule week.

Schedule

Last published 7/22/2024 by commerce@00ubrzsifax9tpom1d7-ncr.asm.qe+stg-yp-admin@gmail.com

Today < > 7/22/2024-7/28/2024 Job Employee

This is to test

Name	Total	Mon 22	Tue 23	Wed 24	Thu 25	Fri 26
			4:00p - 6:00p Server			
Ben Lincoln	15.00 hr	8:00a - 4:00p Cook	10:00p - 5:00a AssistantManager			

Summary data Refresh

Success message

DRAFT

Filtering shifts by job or employee

You may want to view the shifts assigned to a specific employee to determine if the employee is approaching overtime for the week. You can also view the shift assigned with a specific job code to ensure that you have each area of the restaurant covered.

1. Select **Labor > Schedule**. The 'schedule' screen appears.

Schedule Print Publish

This schedule is unpublished.

Today < 02/07/2025 - 02/13/2025 > Employee Job

[Add announcement](#)

Name	Total	Fri	Sat	Sun	Mon	Tue	Wed	Thu
Harry Floeter	0.00 hr	07	08	09	10	11	12	13
Lokesh Kalyan	0.00 hr				Add Shift			

Summary data Refresh

		Fri	Sat	Sun	Mon	Tue	Wed	Thu
Historic sales average	\$131	\$32	\$0	\$0	\$27	\$9	\$32	\$30
Scheduled hours	0.00 hr	0.00 hr	0.00 hr	0.00 hr	0.00 hr	0.00 hr	0.00 hr	0.00 hr
Scheduled labor cost %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %

'Schedule' screen

2. To display all shifts assigned to a job, select the **job** from the 'Job' drop-down list.
3. To display all shifts assigned to an employee, select the **employee** from the 'Employee' drop-down list.

Publishing a schedule

When you are finished with a schedule, click Publish in the top right corner to publish and finalize the schedule. Publish exposes the shift to the employees for the first time. Until then the schedule is in a 'draft' state and managers can make all the edits they need. You can return to the schedule, make changes, and republish, as needed.

To publish a schedule:

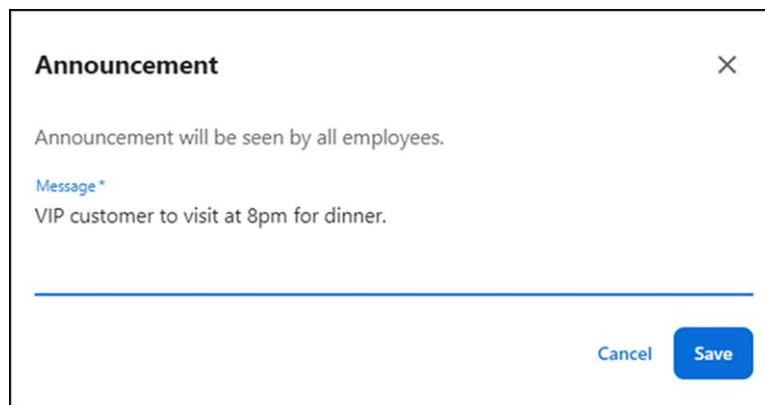
1. Select **Labor > Schedule**. The 'Schedule' screen appears.
2. Select the **schedule** to publish using the date picker.
3. Click **Publish**.

Adding an announcement to a schedule

An announcement is a generic message a manager wants to communicate to all employees during a shift. For example, you can broadcast an announcement to all employees working a shift that a VIP customer is visiting the restaurant.

To add an announcement to a schedule:

1. Select **Labor > Schedule**. The 'Schedule' screen appears.
2. Click **Add announcement**. The 'Announcement' screen appears.
3. Type the **message**, up to 150 characters in length.



'Announcement' screen

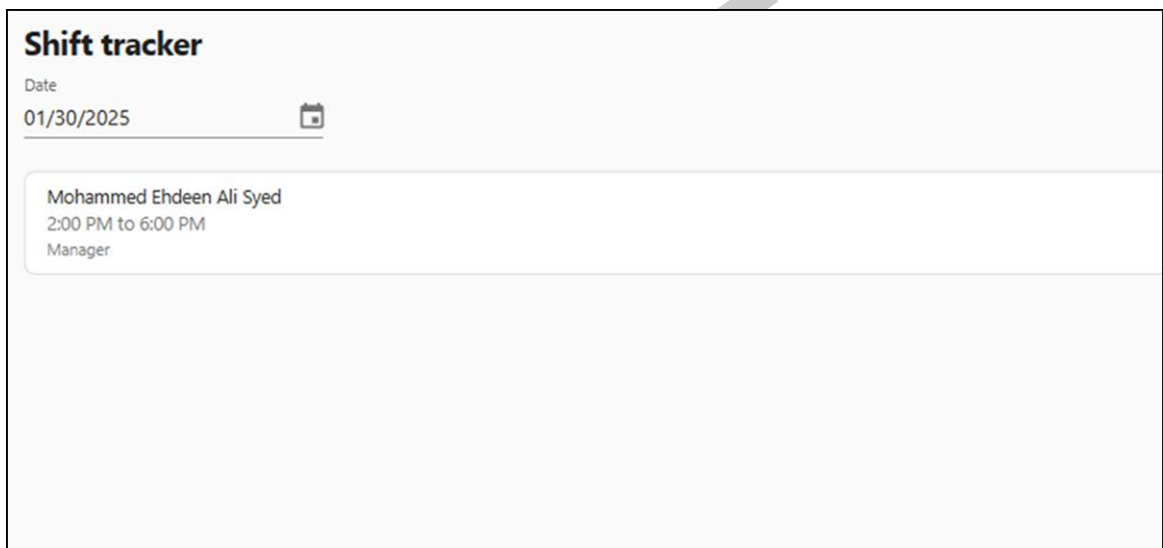
4. Click **Save** to send the announcement.

Viewing employees on a shift

Use the 'Shift tracker' option to view the list of employees scheduled to work the current date or select a different date from the date picker. This is a helpful tool for managers to view who is on the schedule today and to ensure they are fully staffed for the day.

To view employees on a shift:

1. Select **Labor > Shift tracker**. The 'Shift tracker' screen appears. By default, the current date is automatically selected, and the following details appear:
 - The employees scheduled to work for the current date.
 - The time slot scheduled for each employee.
 - The job under which each employee will work.



'Shift tracker' screen

For example, Mohammed Ehdeen Ali Syed works as a Manager from 2:00 PM to 6:00 PM.

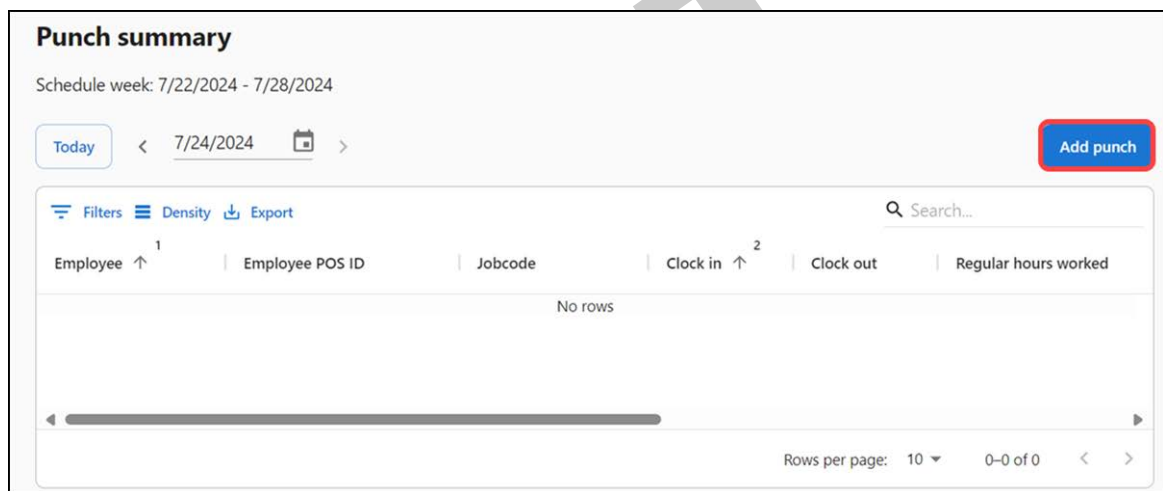
Working with punches

The clock in and out times are referred to as punches, hence the term, 'punching the clock.' Schedules frequently need adjustments to a punch because of normal everyday circumstances in the day of the life of a restaurant. Employees often clock in or out, and break in or out, too early or too late, or not at all. An employee might select the incorrect job. All these factors marginally affect the work hours for the restaurant and, in some cases, could incur legal fines for a restaurant in certain regions. It is important to ensure the correct work hours are accurately reported and monitored regularly.

Use the 'Punch summary' screen to add new punch for your needs. Also, you can adjust a punch for any modifications to the clock-in, clock-out and to the punch reason.

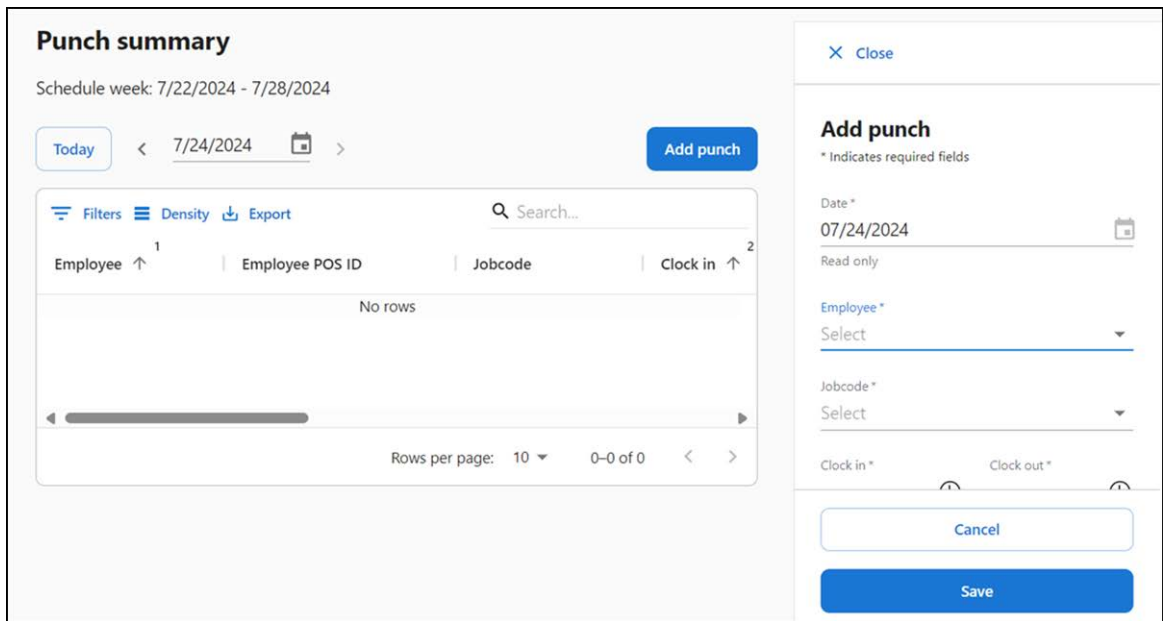
To add a punch:

1. Select **Labor > Punch summary**. The 'Punch summary' screen appears.



'Punch summary' screen

2. Click **Add punch**. The 'Add punch' screen appears on the right side of the screen.



'Add punch' screen

3. Select the **date** of the punch.
4. Select the **employee** associated with the punch.
5. Select the **job** the employee worked.

6. Enter the **actual start and end time** of the punch.

Close

Add punch

* Indicates required fields

Date *
07/24/2024

Read only

Employee *
Ben Lincoln

Jobcode *
Bartender

Clock in *
10:00 AM

Clock out *
05:00 PM

Cancel

Save

'Add punch' screen

7. Click **Add break period** if you are editing a break punch. The following options appear:

Remove break period

Break type *
Paid

Break out * 12:30 PM Break in * 01:00 PM

Remove break period

Break type *
Paid

Break out * 03:00 PM Break in * 03:15 PM

Break section

Break type — Select the type of break the employee took. Select from paid and unpaid.

Break out — Select the time when the break started.

Break in — Select the time when the break ended.

Total sales
\$ _____

Declared tips
\$ _____

Read only

Punch edit reason *
Select ▼

- Forgot to clock in/out
- Incorrect clock in/out
- Incorrect break out/in
- Incorrect jobcode
- Other

Cancel

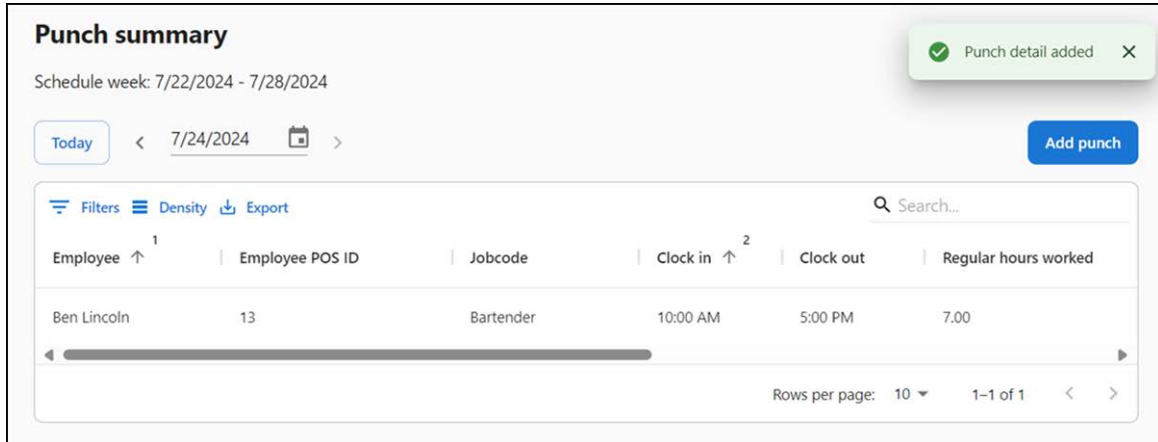
Save

Tip declaration and Punch reason selection

- View the employee **total sales**, if any. This is a read only field.
The Total sales amount allows the manager to declare tips for the employee. For example, if the employee did not clock out, the manager can add a clock out punch, see the total sales for the employee, and enter the declared tips.
- Enter **declared tips** of an employee, if necessary. You can view the log specific to the declared tips. For more information, refer to [Viewing the Activity Log on page 151](#).
- Select **one** of the following **reasons** for the punch adjustment:
 - Forgot to clock in/out** — Specifies the employee forgot to clock in or clock out.
 - Incorrect clock in/out** — Specifies the employee did not clock in or out correctly.
 - Incorrect break in/out** — Specifies the employee did not break in or out correctly.
 - Incorrect job** — Specifies the employee selected the incorrect job.

Others — Miscellaneous reason for which the system-recorded punch was modified.

11. Click **Save**.



'Punch summary' screen - Success message

Once the punch details are recorded, the following details appear in the Punch summary screen:

Employee — Name of the employee whose punch details are recorded.

Employee POS ID — Unique ID of the employee.

Job — Type of job the employee performed for the selected date.

Clock in — Time when the employee logged in at the site.

Clock out — Time when the employee logged out from the site.

Regular hours worked — Hours (excluding overtime) for which the employee worked for the selected date.

Overtime hours worked — Overtime hours for which the employee worked on the selected date.

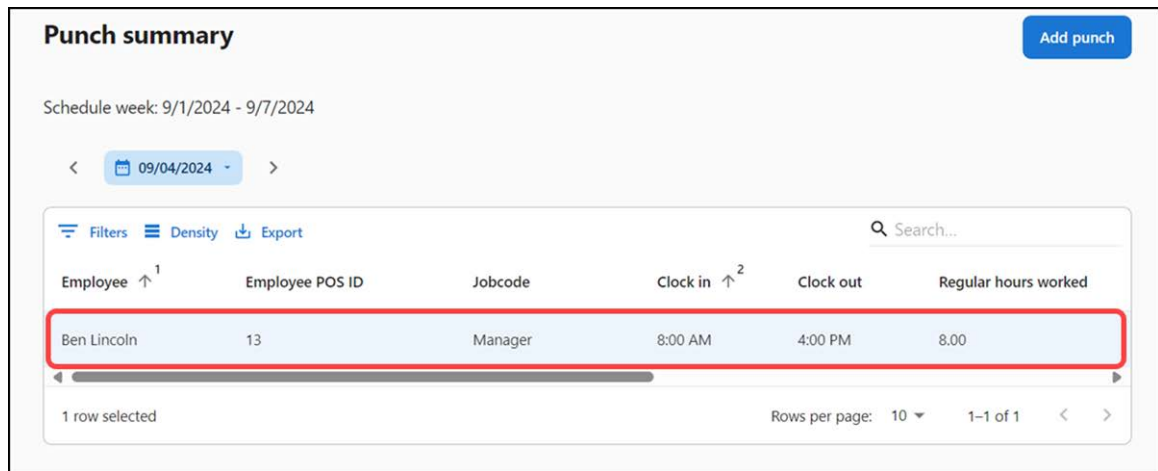
Break hours total — Total hours for which the employee took breaks for the selected date.

Punch edit reason — Reason for which the punch details are modified.

Modified by — Employee who modified the punch details.

To edit a punch:

1. Select **Labor > Punch summary**. The 'Punch summary' screen for the active week appears.
2. Use the **date picker** to select the **day** for which to edit a punch.



'Punch summary' screen

DRAFT

3. Select the **punch** to edit. The 'Punch detail' screen appears on the right side of the screen.

Punch summary Add punch

Schedule week: 9/1/2024 - 9/7/2024

< 09/04/2024 >

Filters Density Export Search...

Employee ¹	Employee POS ID	Jobcode	Clock in ²
Ben Lincoln	13	Manager	8:00 AM

1 row selected Rows per page: 10 1-1 of 1

Punch detail Close Edit

Date
September 4, 2024

Employee
Ben Lincoln

Jobcode
Manager

Clock in
8:00 AM

Clock out
4:00 PM

Total sales
\$0.00

Declared tips
\$10.00

Source
Manual

Modified by
default

Punch edit reason
Incorrect jobcode

Regular hours worked	Overtime hours worked	Break hours total
8.00	0.00	0.00

'Punch detail' screen

4. Click **Edit** and make the necessary changes.
5. Click **Save** to save the punch.

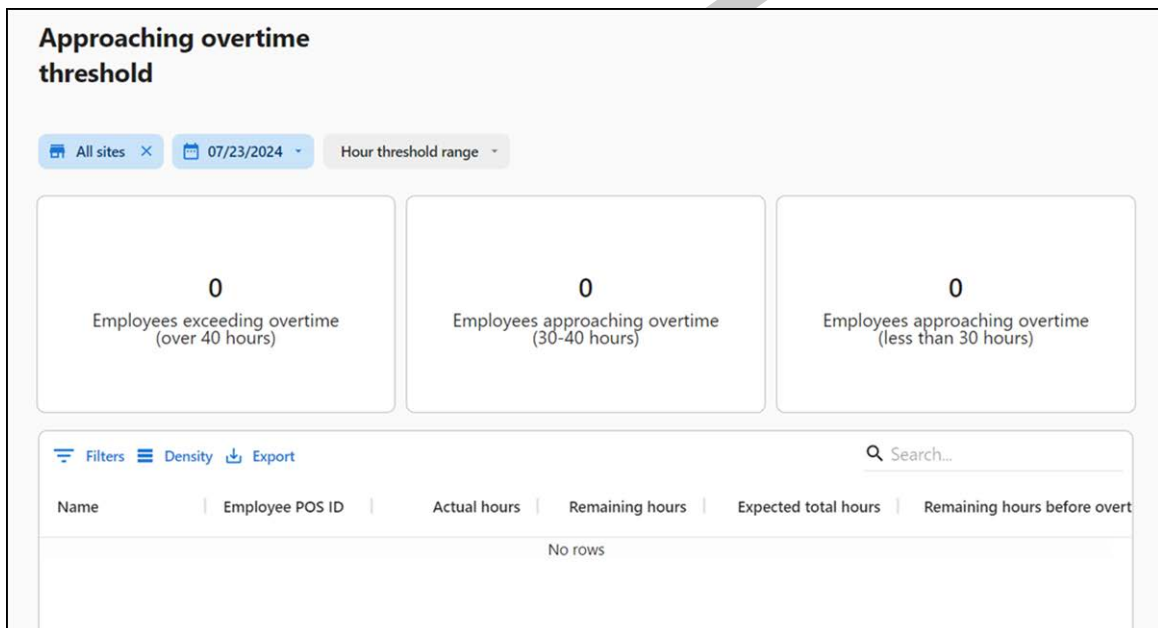
Working with reports

Reports are an essential part of the restaurant and gauge the progress of your restaurant to determine your success and profitability. You can run the following reports found in the labor module:

- [Approaching overtime threshold.](#)
- [Employee payroll](#)

Approaching overtime threshold

Use the 'Approaching overtime threshold' report to view the employees at risk of working overtime for the scheduled week. The report displays the actual hours worked for the week, the remaining hours scheduled to work, and the expected sum of these two values. Employees are subdivided by less than 30 expected hours, between 30 and 40 hours, and over 40 hours. This helps you to proactively avoid overtime costs.



Approaching Overtime Threshold Report

To run the 'Approaching overtime threshold' report:

1. Select **Labor > Reports > Approaching overtime threshold.**
2. Select the **site** from the drop-down.
3. Select the **date range** from calendar picker.
4. Select the **hourly threshold range** from the drop-down, if needed.

The data appears in three tiles:

Employees exceeding overtime (over 40 hours) — The total count of employees who are projected to work more than 40, based on current actual punches plus remaining scheduled shifts.

Employees approaching overtime (30 - 40 hours) — The total count of employees who are projected to work between 30 to 40 hours, based on current actual punches plus remaining scheduled shifts.

Employees approaching overtime (less than 30 hours) — The total count of employees who are projected to work less than 30 hours, based on current actual punches plus remaining scheduled shifts.

Name	Employee POS ID	Actual hours	Remaining hours	Expected total hours	Remaining hours before overtime
Scheduling Perf_E...	f047d7f1-9198-4...	6968.00	0.00	6968.00	
Charles Joseph M...	202311	59.00	63.00	181.00	
Employee User	202310	15.33	145.17	175.83	2...
Ben Lincoln	987654	3.00	12.00	18.00	3...

The following details appear:

Column	Description
Name	The name of the employee.
Employee POS ID	The unique ID of the employee on POS.
Actual hours	The actual hours the employee worked.
Remaining hours	The remaining hours the employee is scheduled to work.
Expected total hours	The expected before the employee is owed to overtime pay.
Remaining hours before overtime	The hours remaining for the overtime hours to begin for the employee.
Next shift	The next shift assigned to the employee.

Employee payroll

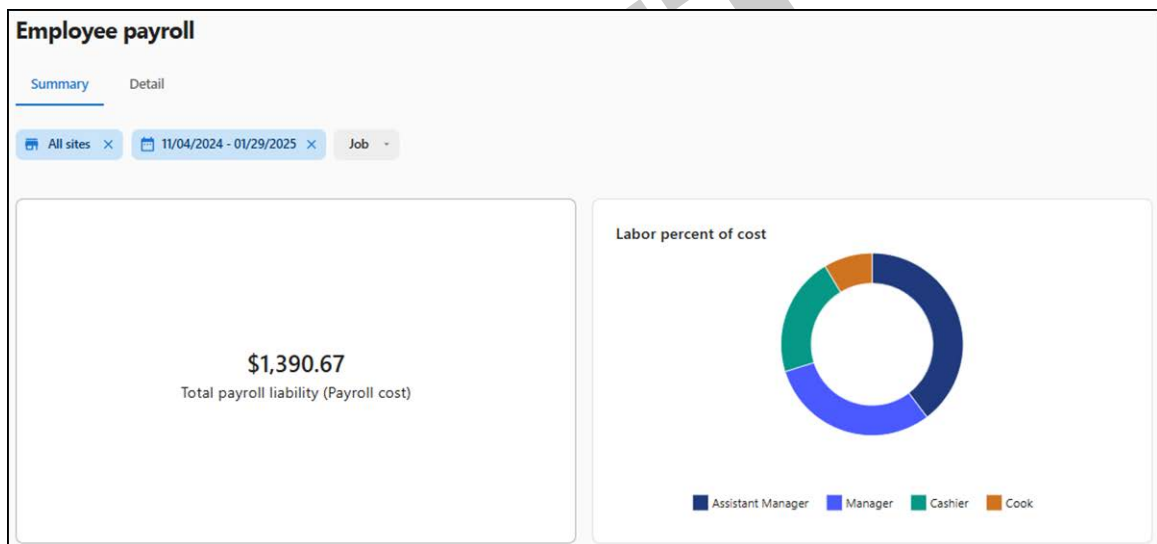
Use the 'Employee payroll' report to view employee payroll information for a selected pay period. The summary section of the report displays the hours and dollars by job, and any overtime or penalty pay earned by the employee. The detail section of the report displays information for individual punches. This report provides you with the option to generate a summary and detailed data related to employee payroll.

The 'Employee payroll' report contains two different views:

- **Summary** - Displays the total payroll by employee by job.
- **Detail** - Displays the actual hours by employee by shift.

Viewing the 'Employee payroll' Summary report

The 'Employee payroll' Summary report displays the total payroll liability cost and labor percent of cost.



'Employee payroll' Summary report

To run the 'Employee payroll' Summary report:

1. Select **Labor** > **Reports** > **Employee payroll**. The details in the Summary tab appear by default.
2. Select the **site(s)** from the drop-down.
3. Select the **date range** from the list given on the left side of the drop-down.
4. Select the **job(s)** from the drop-down provided.

The following details appear in the tiles:

Total payroll liability (Payroll cost) — Total cost incurred as salary to the employee for the selected period.

Labor percent of cost — Breakup of cost incurred by job. Hover-over the graph to view the labor cost (in percentage) and salary (in currency).

Viewing the 'Employee payroll' Detail report

The 'Employee payroll' Detail report displays the payroll liability cost and labor percent of cost, by employee.

Name	Employee POS ID	Jobcode	Pay rate	Regular hours worked	Regular wages	Overtime hours
		Test Job Code For...	\$12.25	893.00	\$10,939.25	
		No jobcode	\$23.28	9.65	\$224.65	
Ben Lincoln	987654	Bartender Extraor...	\$100.00	1.00	\$100.00	
Ben Lincoln	987654	Bartender Extraor...	\$150.00	1.00	\$150.00	
Charles Joseph M...	202311	Server	\$16.00	59.00	\$944.00	
Employee User	202310	Server	\$15.00	27.00	\$405.00	

'Employee payroll' Detail report

To run the 'Employee payroll' Detail report:

1. With the 'Employee payroll' report open, select the **Detail** tab.
2. Select the **site(s)** from the drop-down.
3. Select the **date range** from the list given on the left side of the drop-down.
4. Select the **job(s)** from the drop-down provided.

The following details appear in a tabular format:

Column	Description
Name	The name of the employee.
Employee POS login ID	The unique ID of the employee on POS.
job	The job under which the employee worked.
Pay rate	The pay rate for the job under which the employee worked.
Regular hours worked	The actual hours the employee worked.
Regular wages	The salary of the employee.
Overtime hours worked	The hours the employee worked as overtime.
Overtime wages	The amount paid to the employee for working overtime.
Premium hours worked	The hours the employee worked overtime.
Premium overtime wages	The amount paid to the employee for working overtime.
Penalty wages	The amount paid as penalty wages to the employee. Note: Penalty pay is used in certain jurisdictions that allow monetary compensation to an employee in lieu of not taking their required break. The penalty pay amount usually equals an hour of regular or minimum wage, depending on the requirements of the local law.
Total hours worked	The total hours the employee worked includes regular work hours, overtime hours, and premium hours.

About Inventory

Using the Inventory features, you can maintain vendor information, assign raw items to more than one vendor, and define and maintain the allowable reasons for recording and tracking waste and spoilage. You also have the ability to set up specific raw items with associated prices, and then monitor the price fluctuation using Back Office reports.

This section discusses the following topics:

- **Raw items** — [See "Working with raw items" on page 75.](#)
- **Vendors** — [See "Working with vendors" on page 84.](#)
- **Invoices** — [See "Working with invoices" on page 98.](#)
- **Invoice history report** — [See "Viewing invoice history report" on page 106.](#)

DRAFT

Working with raw items

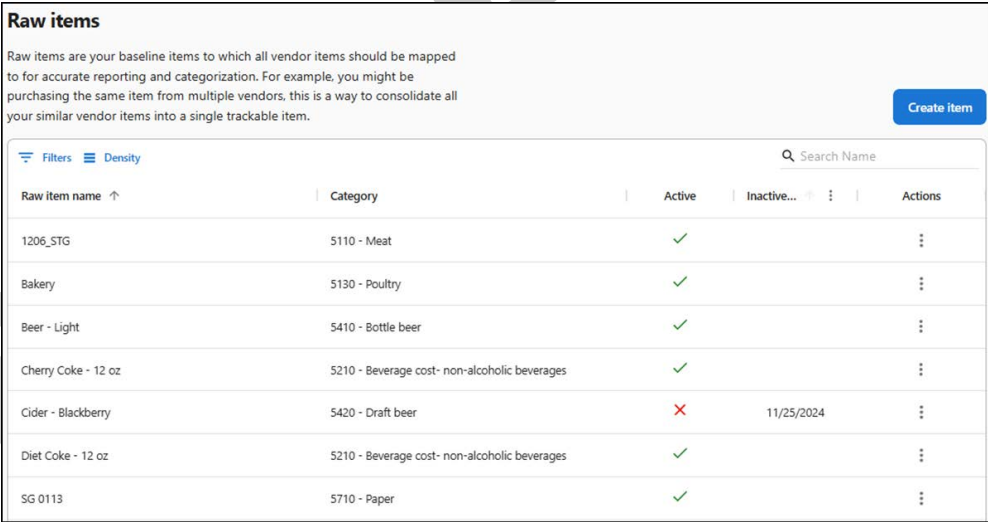
A raw items, also referred to as raw material, are your baseline items, such as the ingredients needed to prepare a finished product for sale to your consumers. Common examples include sugar, salt, chicken, beef, bread, tomatoes, onions, and much more.

In Aloha Smart Manager, raw items are held in the Raw Items function and categorized with a specific category code for reporting. Raw items are then associated with one or many vendor items that are sold by a vendor. For example, you can purchase the raw item Tomatoes from both the Acme vendor and the Sparks vendor. Associate the Tomatoes raw item with both vendors and then track and report on Tomatoes by itself.

Creating a raw item involves multiple steps. You can complete one step and return later to complete another step. We recommend you save your changes in each step to ensure you do not lose your work. With each save, the page advances to the next step.

To create a raw item:

1. Select **Inventory > Raw items**. The 'Raw items' screen appears.



Raw items are your baseline items to which all vendor items should be mapped to for accurate reporting and categorization. For example, you might be purchasing the same item from multiple vendors, this is a way to consolidate all your similar vendor items into a single trackable item.

Filters Density Search Name

Raw item name ↑	Category	Active	Inactive...	Actions
1206_STG	5110 - Meat	✓		⋮
Bakery	5130 - Poultry	✓		⋮
Beer - Light	5410 - Bottle beer	✓		⋮
Cherry Coke - 12 oz	5210 - Beverage cost- non-alcoholic beverages	✓		⋮
Cider - Blackberry	5420 - Draft beer	✗	11/25/2024	⋮
Diet Coke - 12 oz	5210 - Beverage cost- non-alcoholic beverages	✓		⋮
SG 0113	5710 - Paper	✓		⋮

'Raw items' screen

2. Click **Create item**. The 'Create raw item' screen appears.

Create raw item

1 General information | 2 Receive & inventory units | 3 Reporting & recipes

Step 1 out of 3: General information

Create a raw item and associate it to vendor items.

* Indicates required fields

General information

Active item

Deactivate on Select a date to simply deactivate this raw item on a future date.

MM/DD/YYYY

Raw item name *

Category *

Assign vendor items to raw item

Filters | Density | Export | Search...

<input type="checkbox"/>	I...	Ite...	↑	Vendor	A...	CO...	P...	S...	U...	P...
<input type="checkbox"/>	i1	one		v1.8	✓	Cas...	2	3	P...	4...
<input type="checkbox"/>	1...	Onions		Stu's Ste...	✓	Cas...	1	1	E...	1
<input type="checkbox"/>	1...	Broth		Kelly's Pr...	✓	Cas...	1	1	G...	1
<input type="checkbox"/>	1...	Potatoes		Kelly's Pr...	✓	Cas...	1	1	E...	1
<input type="checkbox"/>	M...	Microfibe...		Alsco	✓	Cas...	1	1	E...	0

Current selection Clear selection

0 items selected

Cancel | Save & exit | Save & next

'Create raw item' screen

3. Toggle on **Active Item** to activate the availability of the raw item. When toggled off, you cannot add the raw item to a vendor item. This option is toggled on by default.
4. To set the raw item to deactivate in the future, click the calendar icon to select the **date on which to deactivate the raw item**. The item automatically deactivates on that date.
5. Type a **name** for the raw item. This is a required option.

6. Select a **category** to associate with the raw item from the drop-down list. This is a required option. The predetermined raw item categories in ASM are:

Category Group	Category ID	Category Name
Food	5110	Meat
	5120	Seafood
	5130	Poultry
	5140	Produce
	5150	Bakery
	5160	Dairy
	5170	Grocery & dry goods
	5190	Food cost-non-alcoholic beverages
Non-alcoholic, beverage	5210	Beverage cost-non-alcoholic-beverages
Liquor	5310	Liquor
	5320	Bar consumables
Beer	5410	Bottle beer
	5420	Draft beer
	5430	Brew cost
Wine	5510	Wine
Merchandise	5610	Merchandise
	5620	Vending machine
Paper	5710	Paper

Assign vendor items to raw item

Filters Density Search...

<input type="checkbox"/>	Item code	Item name ↑	Vendor	Active	Container	Pack	Size	Unit	Price
<input type="checkbox"/>	i3	three	Test SG 0113 Smoke test	✓	Bag (bg)	1	1	Kilogram ...	678
<input type="checkbox"/>	3001	Cherry Coke - 12 oz	Coca Cola Company	✓	Case (cs)	4	12	Fluid ou...	100
<input type="checkbox"/>	20001	Berried Treasure Fruited S...	Cherry Street Brewing	✓	Pint (pt)	1	12	Ounce (oz)	26.72
<input type="checkbox"/>	6543	GROUPTOTAL	Cherry Street Brewing	✓	Case (cs)	5	5	#5 Can (#...	0
<input type="checkbox"/>	7689	DISPENSER BEVERAGE-GR...	Cherry Street Brewing	✓	Case (cs)	5	4	#5 Can (#...	0
<input type="checkbox"/>	100	SGTT item one	Coca Cola Company	✓	Case (cs)	1	100	Ounce (oz)	0
<input type="checkbox"/>	4124	Lettuce Romain Hearts	Test_SG_STG testing	✓	Pound (lb)	2	2	Pound (lb)	0

Cancel Save & exit Save & next

- Under the 'Assign vendor items to raw item' group bar, select the vendor item to assign to the raw item..



Reference

Refer to [page 92](#) for instructions on using the 'Assign vendor items to raw item' feature.

- Click **Save & next** to save your progress and advance to the next step, 'Receive & inventory units,' or click **Save & exit** to save your progress and exit the 'Raw items' function so you can return later.

Inventory unit	Vendors	Item names	Actions
cs=10/5 lb	New Catch Weight Vendor	Whole chicken CS/10/4-5 lbs each	⊖
PK=5 lb	New Catch Weight Vendor	Whole chicken CS/10/4-5 lbs each	⊖

'Receive & inventory units' step

- Click **Add inventory unit**, if needed, to add an inventory unit to associate with the raw item. The 'Add new inventory unit' screen appears with the Industry tab as the active tab. The Custom tab is not available at the time of this writing. The inventory units are automatically created from any linked vendor items and broken down into smaller units for counting purposes.

Industry unit *

- Gram
- Ounce
- Milligram
- Kilogram
- Pound
- Gram

'Add new inventory unit' screen

10. Select an **industry inventory unit** to associate with the raw item from the drop-down list and click Add.
11. Click **Save & next** to save your progress and advance to the next step, 'Reporting & recipes,' or click **Save & exit** to save your progress and exit the Raw items function so you can return later.

The screenshot shows the 'Create raw item' form at the 'Reporting & recipes' step. The form has three progress indicators at the top: 'General information' (checked), 'Receive & inventory units' (checked), and 'Reporting & recipes' (active). Below the progress indicators, it says 'Step 3 out of 3: Reporting & recipes' and 'Review which units should be used for reporting and recipes.' There is a note: '* Indicates required fields'. The 'Reporting unit' section has the instruction 'Select a unit to use for reporting.' and three radio buttons: 'Weight' (selected), 'Volume', and 'Count'. Below this is a dropdown menu for 'Reporting unit *' with 'Kilogram (kg)' selected. The 'Recipe unit' section has the instruction 'Select a unit to use for recipes.' and three radio buttons: 'Weight' (selected), 'Volume', and 'Count'. Below this is a dropdown menu for 'Recipe unit *' with 'Kilogram (kg)' selected. At the bottom right, there are 'Back' and 'Save' buttons.

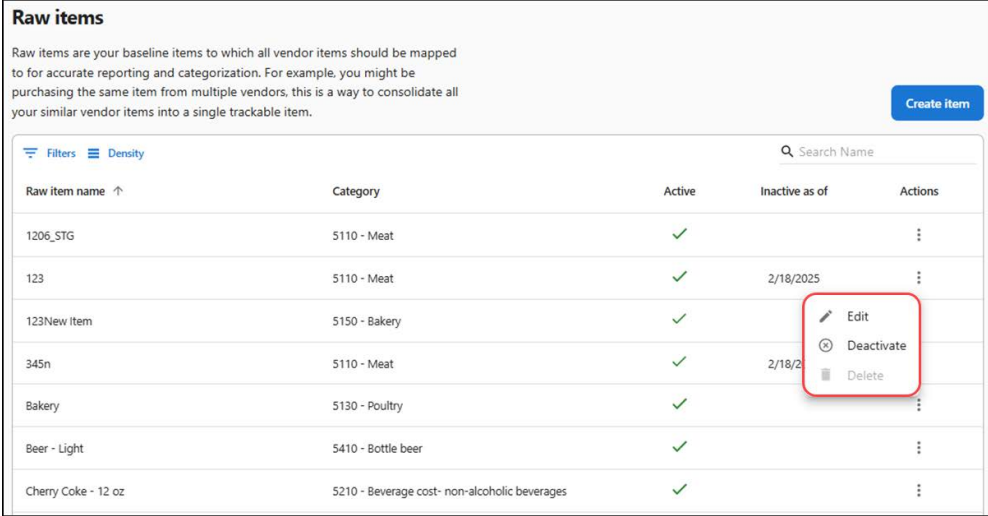
'Reporting & recipes' step

12. Under the 'Reporting unit' group bar, select the respective **unit** to use for reporting. Choose from Weight, Volume, and Count.
13. Select the **reporting unit** from the drop-down list.
14. Under the 'Recipe unit' group bar, select the respective **unit** to use for recipes. Choose from Weight, Volume, and Count.
15. Select the **recipe unit** from the drop-down list.
16. Click **Save** to add the raw item.

To edit a raw item:

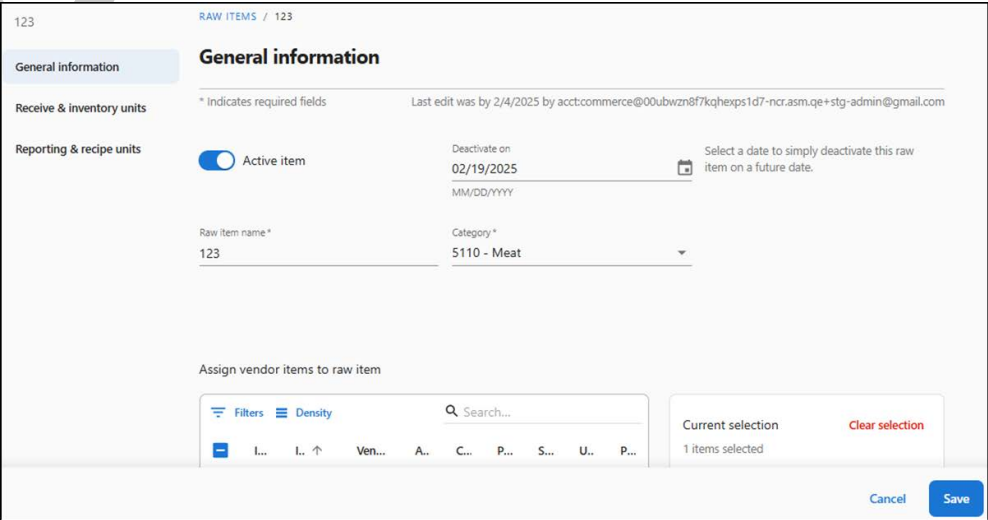
When you edit an existing raw item, the defined steps that appear at the top of the screen during the creation process are moved to the left side of the screen as tabs for ease of use; however, the information between the two experiences is identical. During the editing process, you can access the tabs on the right in any order you choose.

- 1. Select **Inventory > Raw items**. The 'Raw items' screen appears.



Edit a raw item

- 2. Click the **three dots** menu under Actions for the raw item to edit, and select **Edit** from the menu that appears. The 'General information' screen appears.



'General information' screen

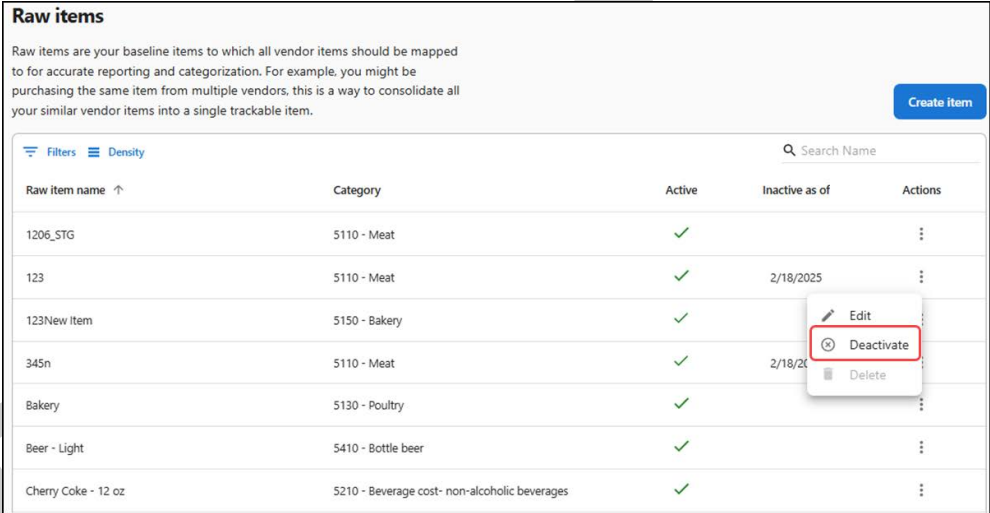
- 3. Use the navigation available on the left of the screen to move through the steps and make the necessary **edits**.
- 4. Click **Save**. A success message appears and automatically dismisses. The raw item is updated with the modifications.
- 5. Click **RAW ITEMS** at the top of the screen to return to the 'Raw items' screen.

To deactivate a raw item:

Note

Once you deactivate a raw item, the associated vendor items also become inactive and are not available to order.

- 1. Select **Inventory** > Raw items. The 'Raw items' screen appears.



Raw items

Raw items are your baseline items to which all vendor items should be mapped to for accurate reporting and categorization. For example, you might be purchasing the same item from multiple vendors, this is a way to consolidate all your similar vendor items into a single trackable item.

Filters Density Search Name

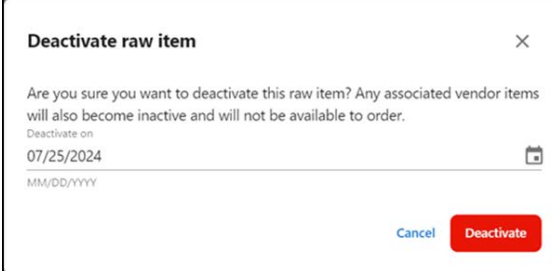
Raw item name	Category	Active	Inactive as of	Actions
1205_STG	5110 - Meat	✓		⋮
123	5110 - Meat	✓	2/18/2025	⋮
123New Item	5150 - Bakery	✓		⋮
345n	5110 - Meat	✓	2/18/2025	⋮
Bakery	5130 - Poultry	✓		⋮
Beer - Light	5410 - Bottle beer	✓		⋮
Cherry Coke - 12 oz	5210 - Beverage cost- non-alcoholic beverages	✓		⋮

Create Item

Edit Deactivate Delete

Deactivate raw items

2. Click the **three dots** menu under Actions for the **raw item** to deactivate, and select **Deactivate** from the menu that appears. A confirmation message appears.



The screenshot shows a modal dialog box titled "Deactivate raw item" with a close button (X) in the top right corner. The main text asks: "Are you sure you want to deactivate this raw item? Any associated vendor items will also become inactive and will not be available to order." Below this, there is a label "Deactivate on" followed by a date input field containing "07/25/2024" and a calendar icon. Underneath the date field is the placeholder text "MM/DD/YYYY". At the bottom right of the dialog, there are two buttons: a blue "Cancel" button and a red "Deactivate" button.

'Deactivate raw item' confirmation message

3. Click **Deactivate** to confirm the deactivation of the raw item, or click **Cancel** to return to the 'Raw items' screen.

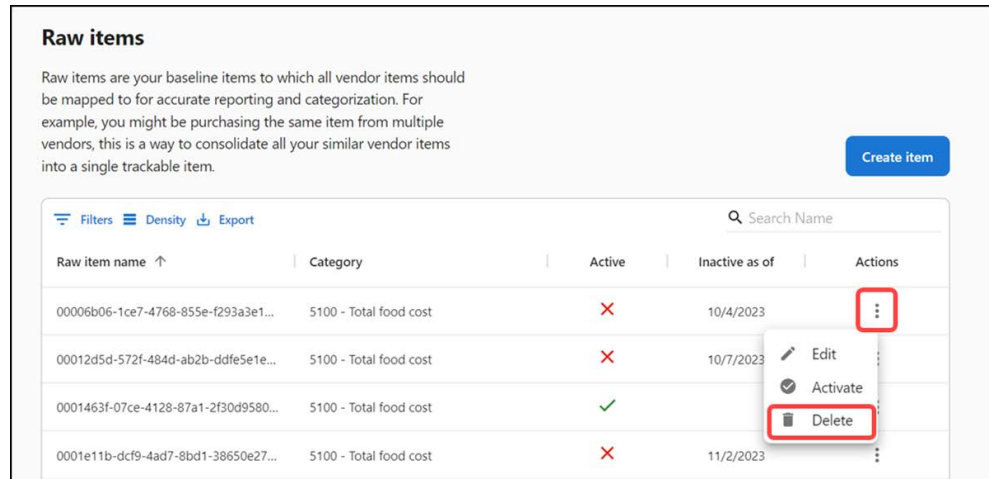
DRAFT

To delete a raw item:

Note

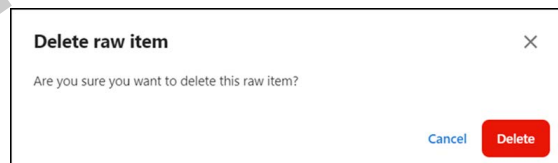
You are not allowed to delete a raw item when it is linked to a vendor item.

1. Select **Inventory > Raw items**. The 'Raw items' screen appears.



Delete raw item

2. Click the **three dots menu** under Actions for the **raw item** to delete, and select **Delete** from the menu that appears. A confirmation message appears.



'Delete raw item' confirmation

3. Click **Delete** to confirm the deletion of the raw item, or click **Cancel** to return to the 'Raw items' screen.

Working with vendors

A vendor is a supplier that sells and delivers their product or service directly to your restaurants. Restaurants typically buy from more than one vendor, based on the wholesale price, the availability of product, the proximity of the vendor location, a corporate mandate requirement, and more. Without vendors, the restaurant does not have the products necessary to prepare their menu items to serve their consumers.

Vendors

Manage all your vendors and their associated catalogs from here. You can also add, edit, and deactivate vendors. Add vendor

Columns Filters Density Search Name

Vendor name	Email	Phone	Active
bgjhfhk			✓
Cherry Street Brewing	<input type="text" value="Cherry Street Brewing"/>		✓
Coca Cola Company			✓
Dallas Organic Produce	DOP@email.com	+91 07165 551 212	✓
Node.js test vendor (imported)	me@Me.com		✓
Smoke Test 01			✓
test			✓

Adding vendor

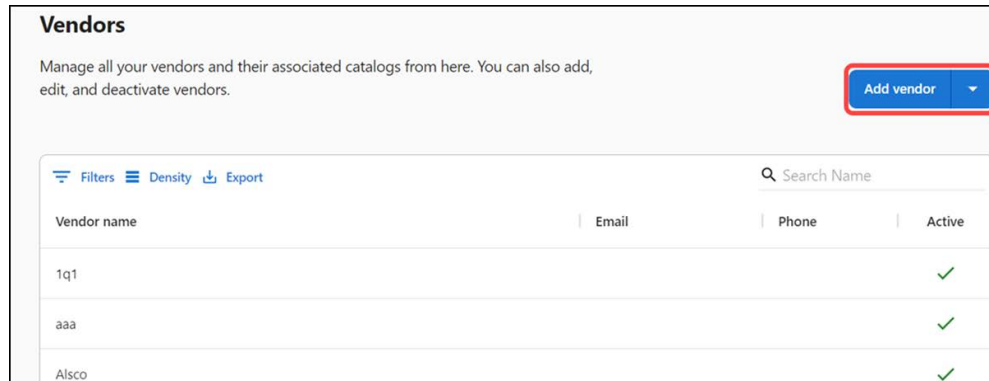


Reference

For information on using a .CSV file to upload vendors in bulk, refer to [page 169](#).

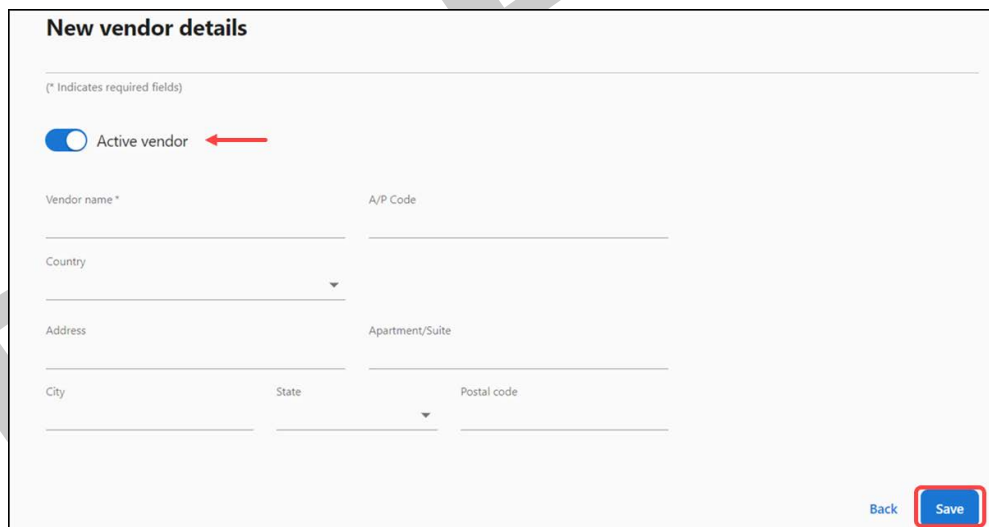
To add a vendor manually:

1. Select **Inventory > Vendors**. The 'Vendors' screen appears.



'Vendors' screen

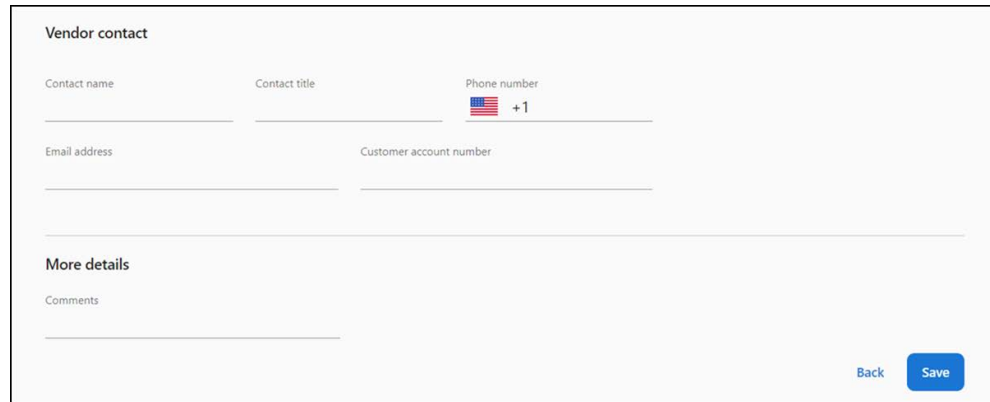
2. Click **Add vendor**. The 'New vendor details' screen appears.



'New vendor details' screen

3. Confirm **Active vendor** is toggled to the on position (default value). When toggled off, you cannot use the vendor.
4. Type the **name** of the vendor.
5. Type the **A/P Code** associated with the vendor. The accounts payable (AP) code is a six-character alphanumeric code attached to the vendor master records that allows you to post transactions to a general ledger account.
6. Select the **country** where the vendor is located from the drop-down list.
7. Type the **address** of the vendor in 'Address 1' and 'Apartment/Suite.'

8. Type the **city**, **state**, and **postal code** of the location of the vendor.
9. Click **Save**.



The screenshot shows a form titled "Vendor contact" with the following fields:

- Contact name
- Contact title
- Phone number (with a dropdown menu showing a US flag and "+1")
- Email address
- Customer account number

Below these fields is a section titled "More details" with a "Comments" field. At the bottom right, there are "Back" and "Save" buttons.

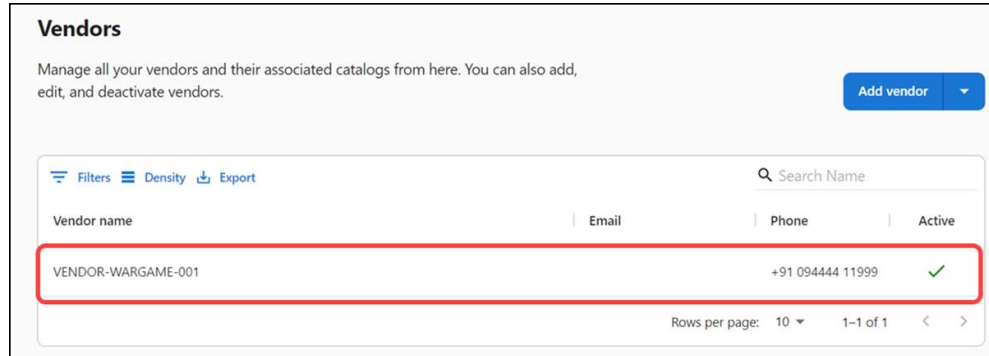
New Vendor Details Screen (Bottom Half)

10. Under the 'Vendor contact' group bar, type the **contact name** of the vendor, typically a vendor employee.
11. Type the **designated title**, **phone number**, and **email address** of the vendor contact.
12. Type your **customer account number** associated with the vendor.
13. Under the 'More details' group bar, enter any **additional information** about the vendor in 'Comments.'
14. Click **Save** to save the vendor details or click **Back** to return to the 'Vendors' screen. The newly added vendor appears in the list.

Once you add a vendor, you must assign vendor items to the vendor. Refer to [Working with vendor items on page 88](#).

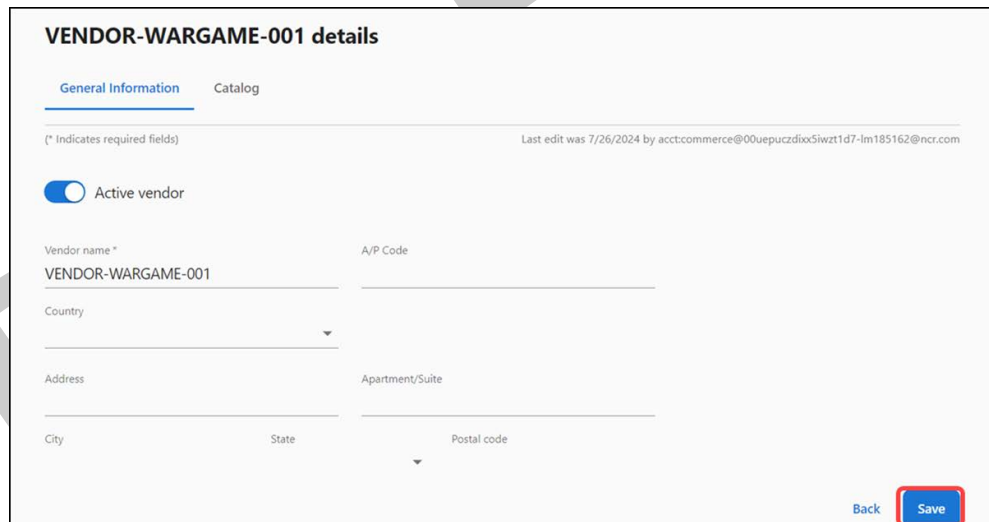
To edit a vendor:

1. Select **Inventory > Vendors**.



Vendors Screen

2. Select a **vendor** to edit. The vendor details appear with the 'General information' tab as the active tab.



Edit vendor details

3. Make the **necessary changes** to the vendor.
4. Click **Save** to save the changes or click **Back** to discard your changes and return to the 'Vendors' screen.

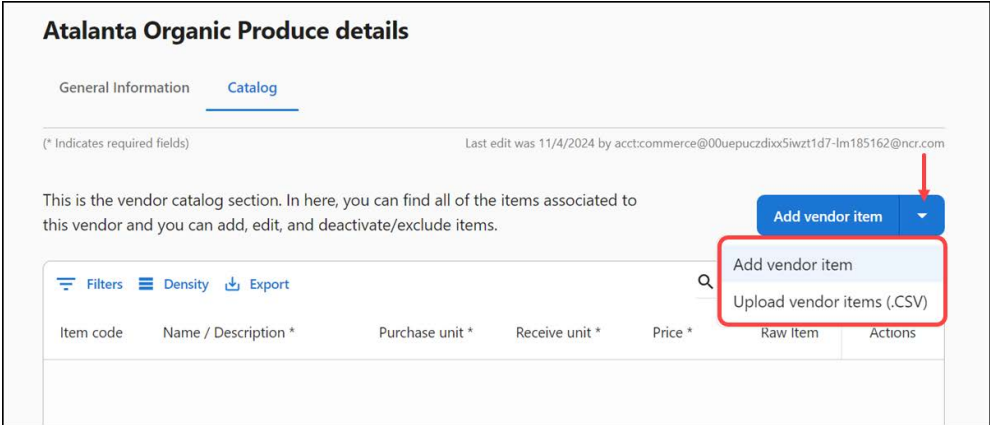
Working with vendor items

After you add a vendor, you can associate the items you purchase from the vendor to the vendor. All vendor items must first be associated with a raw item.



Reference

For more information on associating a raw item with a vendor item, refer to [page 92](#).



Vendor item adding methods

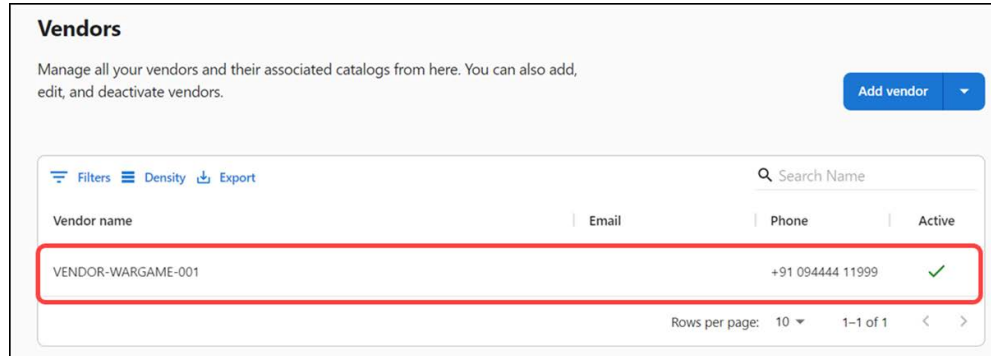


Reference

For information on using a .CSV file to upload vendor items in bulk, refer to [page 173](#).

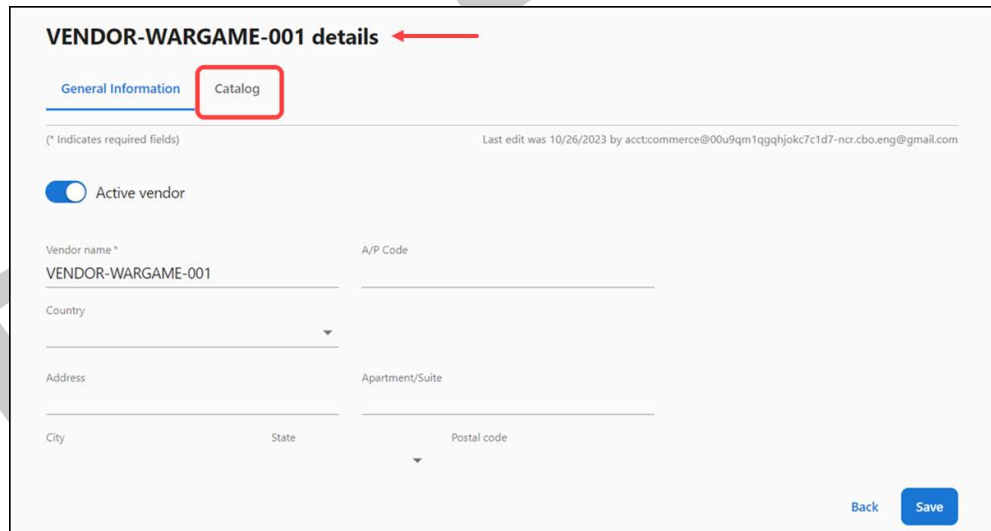
To manually add a vendor item:

1. Select **Inventory > Vendors** to view the available vendors in the 'Vendors' screen.



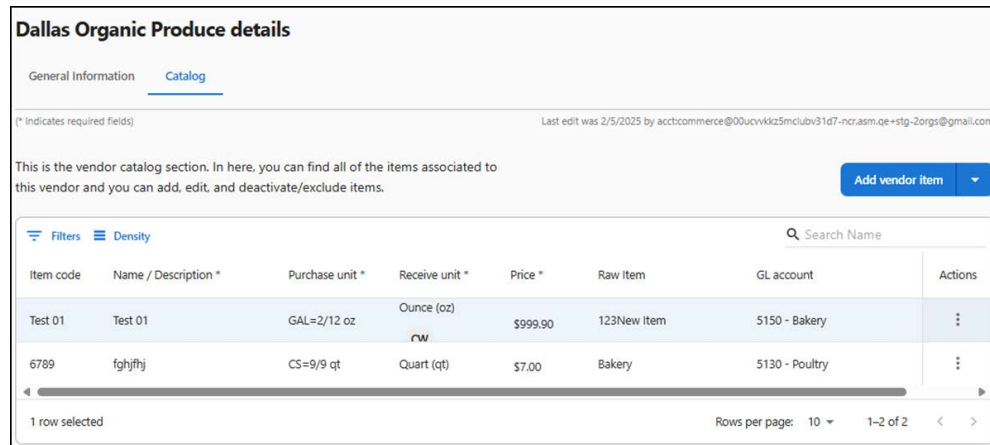
Vendor selection

2. Select the **vendor** that sells or owns the item. The vendor details appear with the 'General information' tab as the active tab.



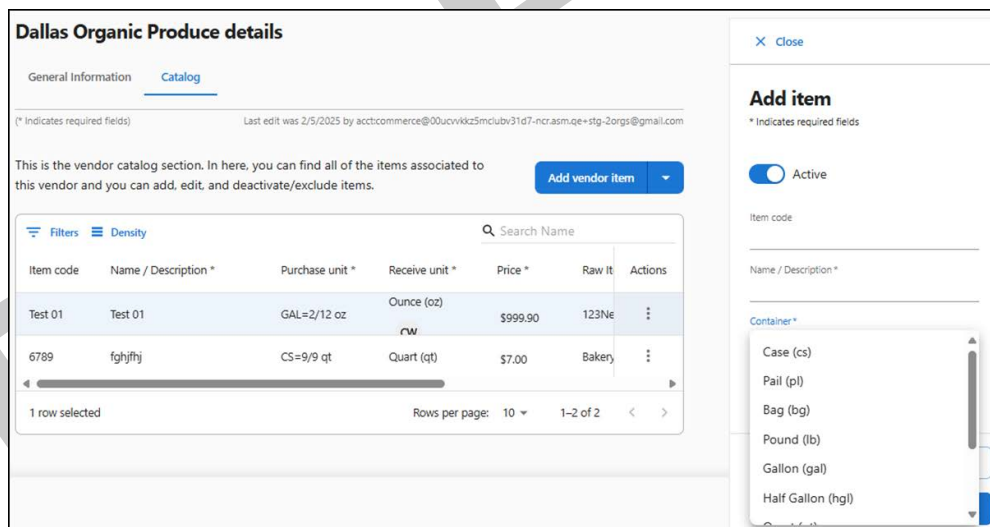
'General information' tab

3. Select the **Catalog** tab.



'Catalog' tab

4. Click **Add vendor item**. The 'Add item' screen appears on the right side of the screen.



'Add item' screen

5. Type the **vendor item code**, up to 50 characters.
6. Type the **name of the item**, up to 250 characters.

7. Select the **bulk packing type** from the 'Container' drop-down list. The available options are Case (CS), Pail (PL), Bag (BG), Pound (LB), Gallon (GL), Half Gallon (HGL), Quart (QT), Liter (LT), Pint (PT), and Dozen (DZ).

Dallas Organic Produce details

General Information **Catalog**

(* Indicates required fields) Last edit was 2/5/2025 by acctcommerce@00ucvkvkz5mclubv31d7-nrcr.asm.qe+stg-2orga@gmail.com

This is the vendor catalog section. In here, you can find all of the items associated to this vendor and you can add, edit, and deactivate/exclude items. **Add vendor item**

Filters Density Search Name

Item code	Name / Description *	Purchase unit *	Receive unit *	Price *	Raw It	Actions
Test 01	Test 01	GAL=2/12 oz	Ounce (oz)	\$999.90	123Ne	⋮
6789	fghjfhj	CS=9/9 qt	Quart (qt)	\$7.00	Bakery	⋮

1 row selected Rows per page: 10 1-2 of 2

Close

Packs per case *

If there are no packs in the case, enter 1

Size * Unit *

Catch weight item

Price *

\$

Raw item

GL account

Save & close

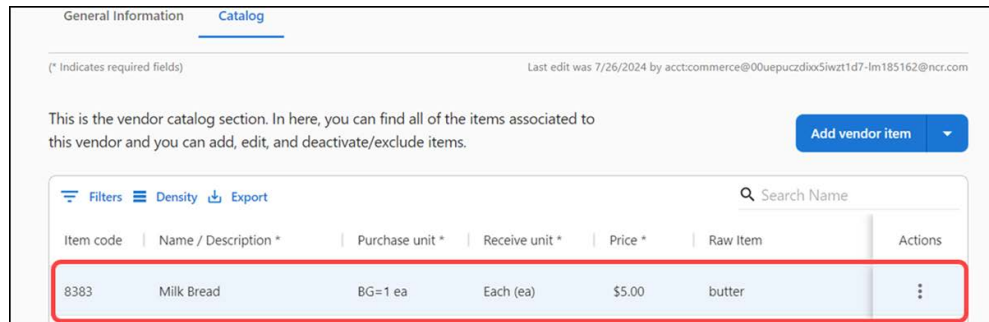
Save & add another

'Add vendor item' Catalog tab

8. Type the **total quantity of packs** in the vendor item container. This must be a numeric value from 1-999, up to two decimals.
9. Type the **actual size of each unit** in the package. This must be a numeric value from 1 to 999, up to two decimals.
10. Select the **standard unit of measurement** of the item. Select from Fluid Ounce (fl. Oz), Quart (qt.), Milliliter (ml), Gram (g), Ounce (oz.), EA (ea), Pint (pt), Gallon (gal), #5 Can (#5 Can), #10 Can (#10 Can), Liter (L), Milligram (mg), Kilogram (kg), Pound (Lb), and Dozen (DZ).
11. Type the **unit price** of the vendor item container. It must be a numeric value (up to two decimals).
12. Type the name of the raw item associated with the vendor item. The maximum allowed character length is 250.
13. Enter the **item category**. Must be written as category ID.
14. Click **Save & close** to save the changes.

-OR-

Click **Save & add another** to add another item to the vendor.

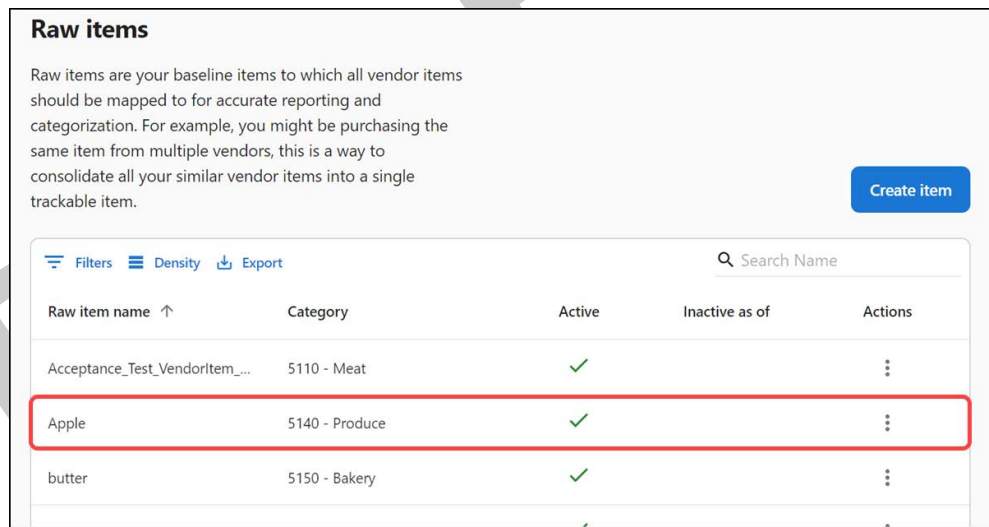


Manually added vendor item

To use the Raw Items function to associate a raw item with a vendor item:

As an alternate method to working in the Vendors function, you can use the Raw Items function to associate a raw item with a vendor item. The vendor item must already exist.

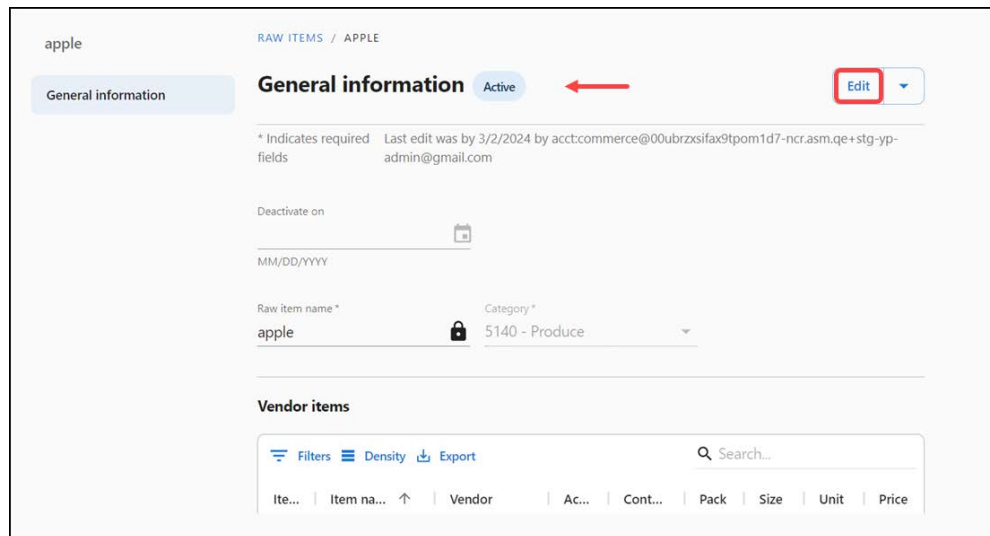
1. Select **Inventory > Raw Items**. The 'Raw items' screen appears.



'Raw items' screen

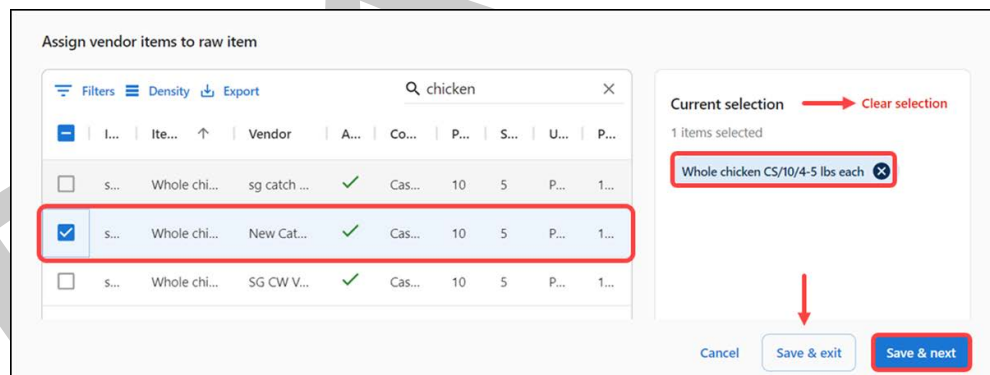
2. Select a **raw item** from the list.

3. Click the **three dots** menu under **Actions** and select **Edit** from the menu that appears. The 'General information' screen appears.



'General information' screen

4. Scroll **down the screen** to the 'Assign vendor items to raw item' group bar.

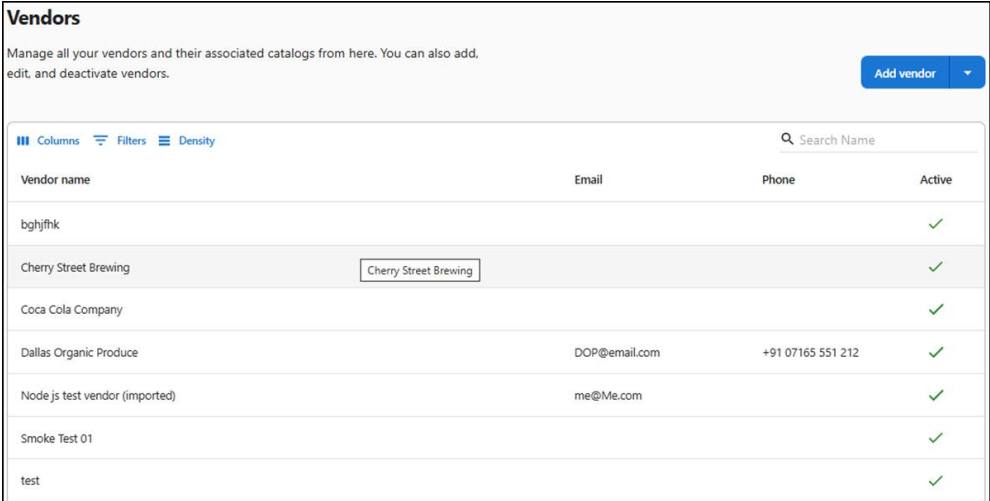


'Assign vendor items to raw item' group bar

5. Select the **vendor item** to assign to the selected raw item. The selected 'vendor item' appears in the 'Current selection' pane.
6. Click **Save & next** to save and continue with the **next step**.
-OR-
Click **Save & exit** to save the changes and exit the screen.
7. To cancel the vendor item association with the raw item, click **Clear selection**.

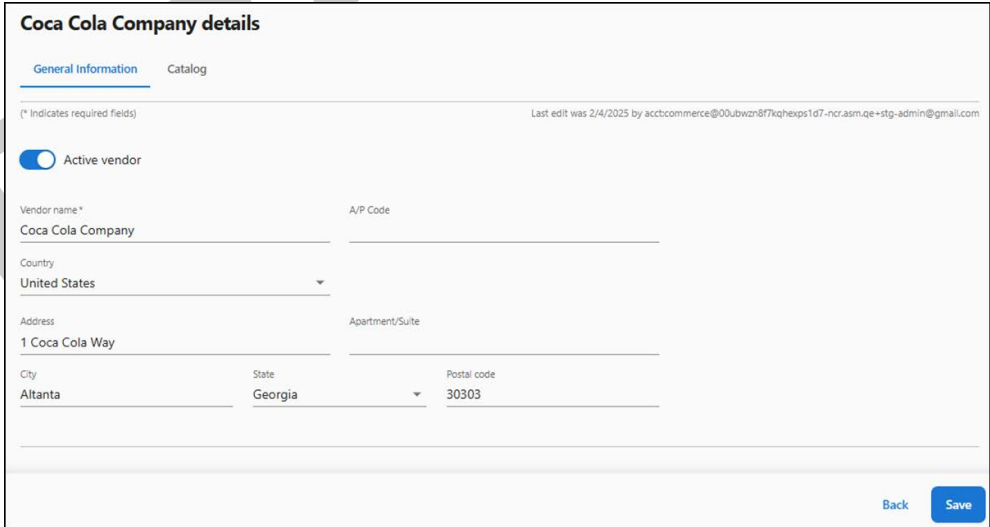
To edit a vendor item:

- 1. Select **Inventory > Vendors**. The available vendors appear.



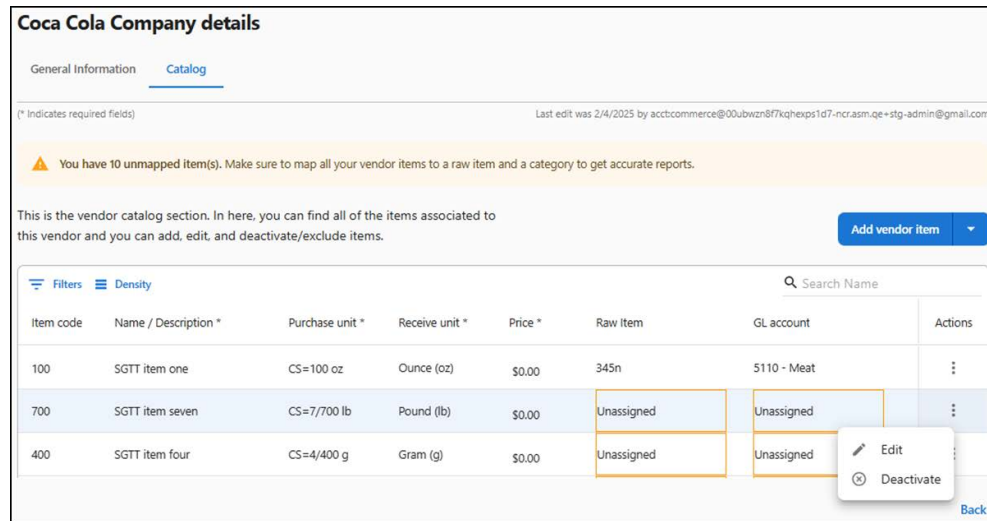
Vendor selection

- 2. Select the **vendor** that sells the item. The vendor details appear with the 'General information' tab as the active tab.



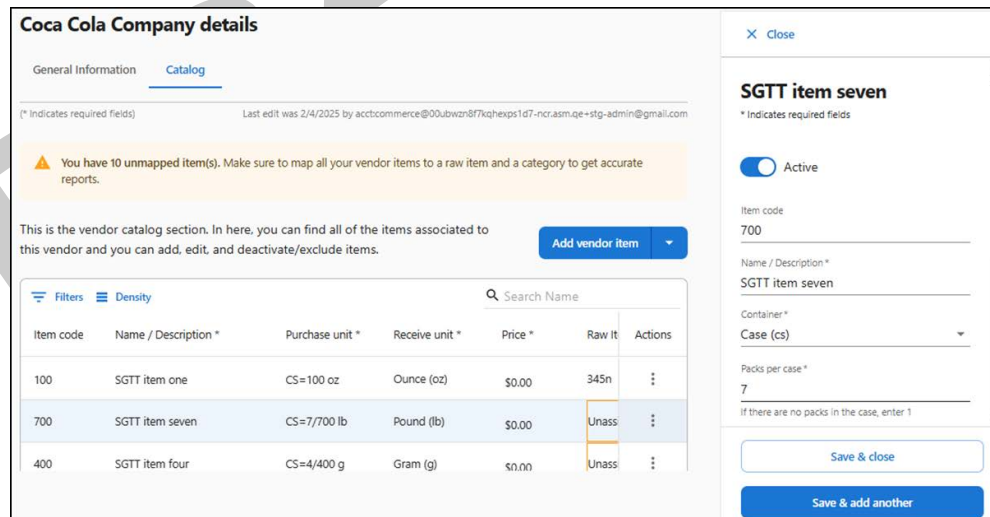
'General information' tab

3. Select the **Catalog** tab. The list of items associated with the vendor appear on the screen.



Edit vendor item

4. Select an **item** from the list.
5. Click the **three dots** menu under **Actions** and select **Edit** from the menu that appears. A screen appears on the right side of the screen.



Edit vendor item options

6. Click **Save & close** to save the changes and close the vendor item edit window, or click **Save & add another** to save the edits and add another vendor item.

To deactivate a vendor item:

- 1. Select **Inventory > Vendors**. The available vendors appear.

Vendor name	Email	Phone	Active
bghjfhk			✓
Cherry Street Brewing			✓
Coca Cola Company			✓
Dallas Organic Produce	DOP@email.com	+91 07165 551 212	✓
Node.js test vendor (imported)	me@Me.com		✓
Smoke Test 01			✓
test			✓

Vendor selection

- 2. Select the **vendor** that sells the vendor item. The 'Vendor details' screen appears with the 'General information' tab as the active tab.

Coca Cola Company details

General Information | Catalog

(* Indicates required fields) Last edit was 2/4/2025 by acctcommerce@00ubwzn8f7kqhexps1d7-ncr.asm.qe-stg-admin@gmail.com

Active vendor

Vendor name * A/P Code

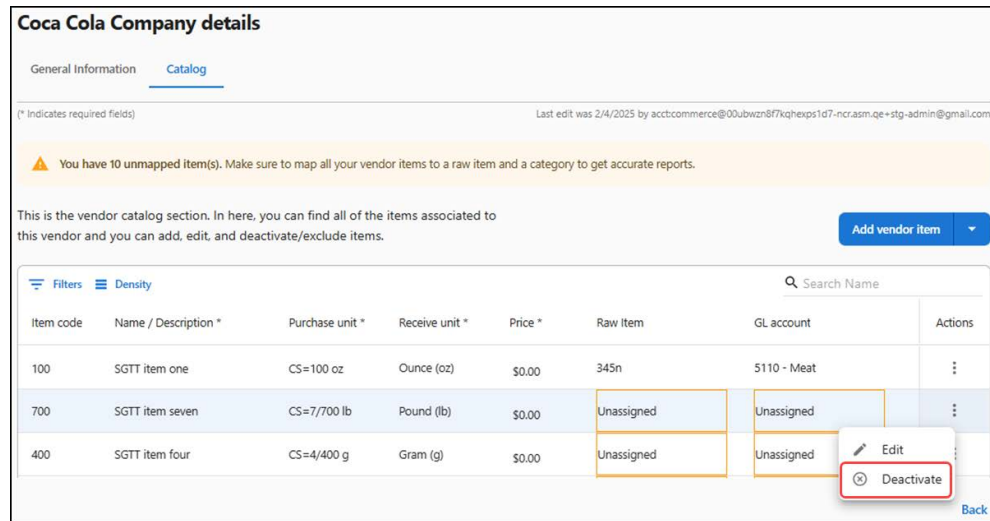
Country

Address Apartment/Suite

City State Postal code

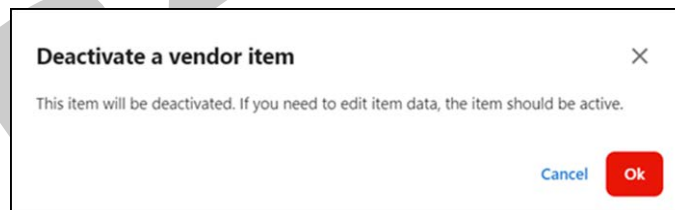
'General information' tab

3. Select the **Catalog** tab to view a list of the vendor items.



Vendor details 'Catalog' tab

4. Select a **vendor item**.
5. Click the **three dots** menu under Actions and select **Deactivate** from the menu that appears. A confirmation message appears.



Deactivate confirmation message

6. Click **OK** to confirm.

Working with invoices

An invoice is a bill received from a vendor and provides a proof of purchase for the vendor item received at the restaurant. You can use ASM to capture the invoice for proper record keeping and distribution.

Using Aloha Smart Manager, it is easy to upload invoices in CBO (Cloud Back Office) and view the invoices report. Managers can upload invoices either manually or by scanning a digital invoice file.

Managers review all invoices entered into the Back Office by the entry type (manual, scan flat file import, electronic transfer by vendor, or API). When a manager selects the Optical Character Recognition (OCR)/scan type, the manager is able to compare the image to the invoice data entered into the Back Office system and validate for the proper translation. The manager can navigate from report to invoice entry to make corrections, if needed, and then return to the report to continue reviewing the report.

Invoice approval process

In ASM, an uploaded invoice must go through multiple stages before it is finalized. The stages of invoice approval are:

1. The restaurant obtains the invoice from the vendor.
2. An employee or mid-level manager captures the invoice in ASM. The status is set as Draft.
3. A manager either accepts or finalizes the uploaded invoice. If accepted, the status changes to Accepted. If finalized, the status changes to Finalized.

Capturing invoice details

You can capture invoice details using two different methods:

- Manually adding the invoice details. See [page 98](#).
- Uploading a digital image of the invoice. If you upload a PDF, each PDF page is converted to an image file. See [page 180](#).

Manually adding an invoice

An employee or mid-level manager manually adds the invoice in ASM, which is then approved and finalized by the restaurant manager.

To manually add an invoice:

- 1. Select **Inventory > Invoices**. The 'Invoice list' screen appears.

Invoice list

Create an invoice by manually entering data or by uploading an image of your invoice (.PDF, .JPG, .IMG, .JPEG, .PNG). PDF files will be converted to images upon upload and managed individually by page. Services are required to be added manually.

Invoices Incomplete uploads Add invoice (blank)

Filters Density Search Invoice ID

Invoice ID	Source	Vendor name	Invoice date ↓	Delivered date and time	Total	Status	Last	Actions
656456546	Manual	Cherry Street Brewing	6/27/2044	6/27/2024 8:21 PM	\$16.00	Draft	9/18	
20250130-03	Upload	Coca Cola Company	1/30/2025	1/31/2025 3:41 AM	\$23,979.87	Accepted	1/31	
20250130-02	Upload	Coca Cola Company	1/30/2025	1/31/2025 3:51 AM	\$504.14	Draft	1/31	
20250129-1	Manual	Coca Cola Company	1/29/2025	1/29/2025 6:48 PM	\$1,202.00	Finalized	1/29	
12802	Manual	Dallas Organic Produce	1/28/2025	1/28/2025 6:36 PM	\$13,809.80	Accepted	1/28	
12801	Upload	Test SG 0113 Smoke test	1/28/2025	1/28/2025 6:30 PM	\$251,158...	Finalized	1/31	

'Invoice list' screen

DRAFT

2. Click **Add invoice (blank)**. The 'Invoice details' screen appears.

Invoice details

* Indicates required fields

Invoice information

Invoice date *
02/05/2025

Invoice delivery date and time *
02/05/2025 10:25 AM

Invoice ID *
Invoice comments

Vendor information

Vendor name *

Add item

Filters Density Search...

Item / Service	Item code	Name / Description	Receive unit	Quantity	Price	Subtotal	Tax	Total	Actions
No rows									

Subtotal \$0.00

Sales tax \$0.00

Amount payable \$0.00

Back

'Invoice details' screen

3. Select the **invoice date**.
4. Select the **date and time** when the invoice was sent to the restaurant.
5. Type the **unique ID** of the invoice.

6. Type any **additional information** about the invoice in 'Invoice comments.'

The screenshot shows the 'Invoice information' form. It includes fields for 'Invoice date*' (02/05/2025), 'Invoice delivery date and time*' (02/05/2025 12:05 PM), 'Invoice ID*' (359), and 'Invoice comments'. Below these is the 'Vendor information' section with a 'Vendor name*' field. A dropdown menu is open, showing a list of vendors: 'bgjhfhk', 'Cherry Street Brewing', 'Coca Cola Company', 'Dallas Organic Produce', 'Node js test vendor (imported)', 'Smoke Test 01', 'test', and 'test0808'. To the right of the dropdown is an 'Add item' button. Below the dropdown is a table with columns: 'Name / Description', 'Receive unit', 'Quantity', 'Price', 'Subtotal', 'Tax', 'Total', and 'Actions'. A search bar is located above the table. A 'Back' button is in the bottom right corner.

Adding or selecting a vendor

7. Click **Vendor name** to view a list of vendors.
 8. Select a **vendor** from the list. Alternatively, if the required vendor is not listed, enter the **new vendor name** in 'Vendor name.' The Add <New vendor name> option appears. Click **Add** to create a new vendor.
- The invoice status is set to Draft and the options to 'Accept invoice' and 'Finalize invoice' appear.

The screenshot shows the 'Invoice details' form. At the top, it says 'Invoice details Draft' with a red arrow pointing to the 'Draft' status. There is a 'Delete invoice' button with a trash icon. Below this is a note: '* Indicates required fields' and 'Last edit was 7/26/2024 by acct:commerce@00uepuczdxs5iwzt1d7-lm185162@ncr.com'. The 'Invoice information' section includes 'Invoice date*' (07/26/2024), 'Invoice delivery date and time*' (07/26/2024 03:27 PM), 'Invoice ID*' (8325), and 'Invoice comments'. The 'Vendor information' section includes 'Vendor name*' (6572654367785). At the bottom right, there are two buttons: 'Accept invoice' and 'Finalize invoice', both highlighted with a red box. A 'Back' button and a blue 'Accept invoice' button with a dropdown arrow are also visible.

Invoice record saved as Draft

Invoice details Draft Delete invoice

* Indicates required fields Last edit was 7/26/2024 by acct:commerce@00uepuczdx5iwtz1d7-lm185162@ncr.com

Invoice information

Invoice date * Invoice delivery date and time *

Invoice ID * Invoice comments

Vendor information

Vendor name *

Add item

Back Accept invoice

Option to add an item to the invoice

9. Click **Add item** to manually enter the first item in the invoice. The 'Add item' screen appears on the right side of the screen.

Invoice details Draft Delete invoice

* Indicates required fields Last edit was 7/26/2024 by acct:commerce@00uepuczdx5iwtz1d7-lm185162@ncr.com

Invoice information

Invoice date * Invoice delivery date and t...

Invoice ID * Invoice comments

Vendor information

Vendor name *

Add item

Back Accept invoice

Close

Add item

* Indicates required fields

Item Service

Item code *

Name / Description *

Container *

Package per dozen *

Save & close

Save & add another

Option to enter item or service details

10. Click **Item** or **Service** to designate the **type of item** to add to the invoice. Choose from:

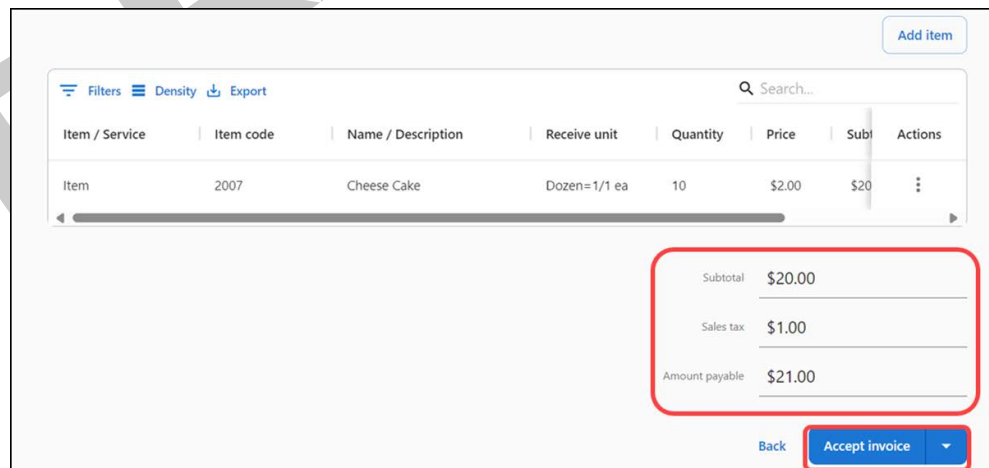
Item — Indicates the item is a product purchased from the vendor, such as egg or milk.

Service — **Indicates** the item is for a service provided by the vendor, such as a catering service.

11. Type the **vendor item code**, up to 50 characters.

12. Type the **name and description of the item**, up to 250 characters.

13. Select the **bulk packing type** from the 'Container' drop-down list. Select from Case (CS), Pail (PL), Bag (BG), Pound (LB), Gallon (GL), Half Gallon (HGL), Quart (QT), Liter (LT), Pint (PT), and Dozen (DZ).
14. Type the **total quantity of packs** in vendor item container. This must be a numeric value from 1 to 999, up to two decimals.
15. Type the **actual size of each unit** in the package. This must be a numeric value from 1 to 999, up to two decimals.
16. Select the **standard unit of measurement** of the item. The available unit of measures are Fluid Ounce (fl. Oz), Quart (qt.), Milliliter (ml), Gram (g), Ounce (oz.), EA (ea), Pint (pt), Gallon (gal), #5 Can (#5 Can), #10 Can (#10 Can), Liter (L), Milligram (mg), Kilogram (kg), Pound (Lb), and Dozen (DZ).
17. Type the **quantity** of vendor items.
18. Type the **unit price** of the vendor item container. It must be a numeric value (up to two decimals). The sub-total amount is auto calculated as Quantity × Price. This is the amount excluding the tax amount.
19. Type the **tax amount**. This is the applicable tax of all units. The total amount of items is auto calculated as Subtotal × Tax. This is the total amount including the tax amount.
20. Click **Save & close** to save the item and close the invoice, or click **Save & add another** to save the current item and add another item.
21. Repeat **steps 9** through **20** for all items and services to be included as per the invoice. The subtotal, sales tax, and amount payable appear at the bottom.



Added invoice items and services

22. Click **Accept invoice** to confirm the invoice details. The status of the invoice changes to 'Accepted' and the **Finalize invoice** option appears. A manager can modify or delete the accepted invoice.

The screenshot shows the 'Invoice details' form with the status 'Accepted' highlighted in a red box. The form includes the following fields and buttons:

- Invoice information:**
 - Invoice date *: 07/26/2024
 - Invoice delivery date and time *: 07/26/2024 03:27 PM
 - Invoice ID *: 8325
 - Invoice comments: (empty)
- Vendor information:**
 - Vendor name *: 6572654367785
- Buttons:** 'Delete invoice' (red), 'Edit' (blue), 'Add item' (grey), 'Back' (blue), and 'Finalize invoice' (red).

Accepted invoice

23. Click **Finalize invoice** to approve the invoice. The status of the invoice changes to 'Finalized.'

The screenshot shows the 'Invoice details' form with the status 'Finalized' highlighted in a red box. The form includes the following fields and buttons:

- Invoice information:**
 - Invoice date *: 07/26/2024
 - Invoice delivery date and time *: 07/26/2024 03:27 PM
 - Invoice ID *: 8325
 - Invoice comments: (empty)
- Vendor information:**
 - Vendor name *: 6572654367785
- Buttons:** 'Delete invoice' (red), 'Add item' (grey), 'Back' (blue), and 'Unfinalize invoice' (blue).

Finalized invoice

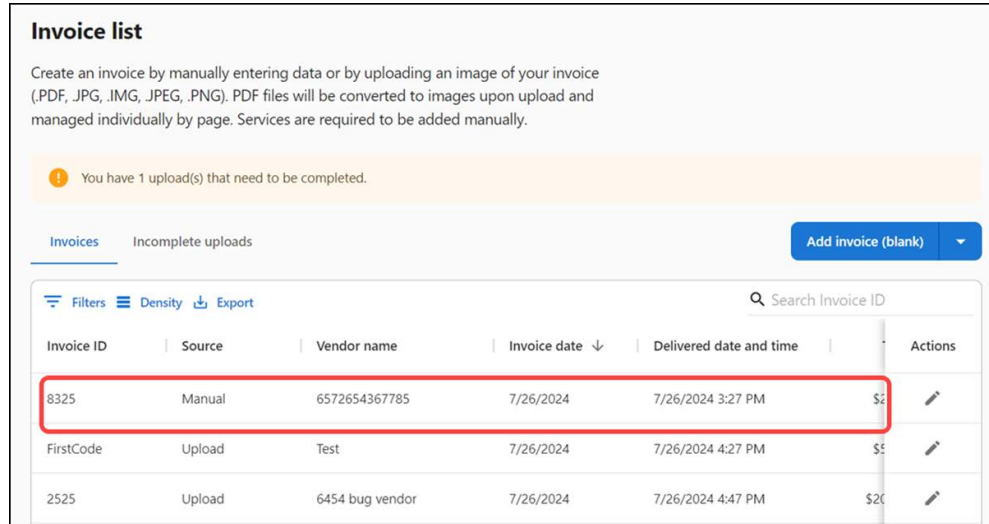
Note

Click 'Unfinalize invoice' to revert the finalized invoice status to Draft.

24. Click **Back** to return to the invoice screen.

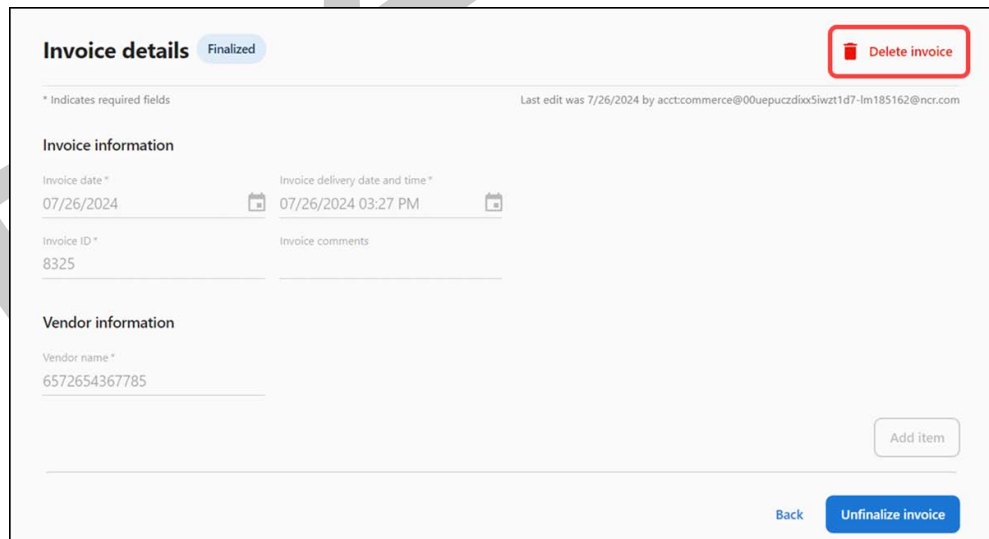
Deleting an invoice

1. Select **Inventory > Invoices**. The 'Invoice list' screen appears.



'Invoice list' screen

2. Select an **invoice** to delete. The 'Invoice details' screen appears.



'Invoice details' screen

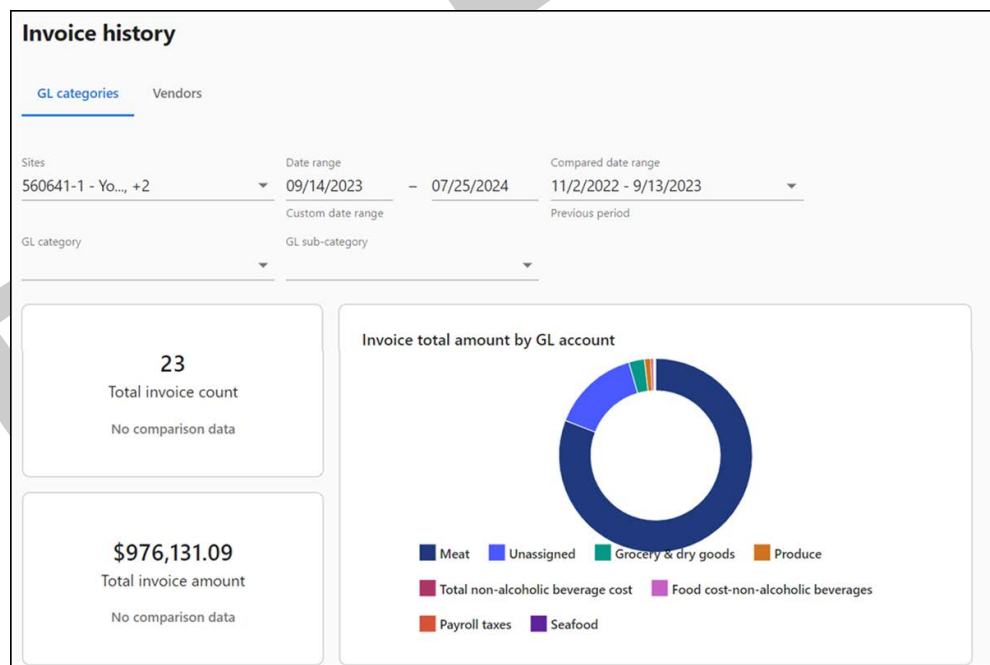
3. Click **Delete invoice**. A confirmation message appears allowing you to confirm the invoice deletion.
4. Click **Delete** to confirm.

Viewing invoice history report

A manager can review all the invoices entered into the Back Office (ASM) with specific to the entry type (manual, scan flat file import, electronic transfer by vendor, or API). When Manager selects the OCR/Scan type, then manager is able to compare the image to the invoice data entered into the ASM to validate proper translation. The manager can easily navigate from report to invoice entry to make corrections if needed and then back to report, so they can continue reviewing the report.

To run invoice history report of GL categories:

1. Select **Inventory > Invoice history report**. The details in GL categories tab appears by default.
2. Select the **site(s)**.
3. Select the **date range**.
4. Select the **compared date range**.
5. Select a **Geo location (GL) category** type from the drop-down list.
6. Select a **Geo location (GL) sub-category** type from the drop-down list. The following details appear on the screen.



Invoice history report - GL categories

- **Total invoice count** - Total invoice count and the growth percentage of invoices when compared to the previous period.
- **Total invoice amount** - Total invoice amount and the growth percentage when compared to the previous period.

GL sub-category	Invoice count	Subtotal	Sales tax	Total
Unassigned (1)	19	\$146,746.90	\$0.00	\$146,746.90
Unassigned	19	\$146,746.90	\$0.00	\$146,746.90
5000 - Cost of sales (1)	3	\$3,869.50	\$0.00	\$3,869.50
5200 - Total nor	3	\$3,869.50	\$0.00	\$3,869.50
5100 - Total food cost	13	\$829,089.17	\$2.58	\$829,091.75
5110 - Meat	2	\$789,428.90	\$0.00	\$789,428.90
5120 - Seafood	1	\$781.44	\$0.00	\$781.44

Invoice history report details

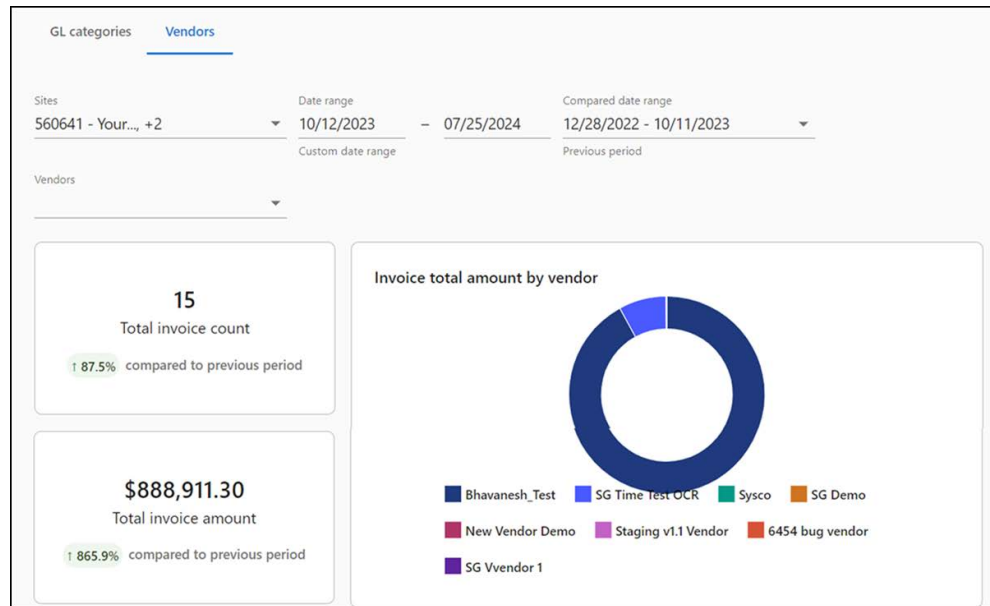
Additionally, the following details appear in a tabular format:

Column	Description
GL sub-category	Name of the GL category.
Invoice count	The total count of invoices.
Subtotal	The subtotal of the invoices excluding the tax amount.
Sales tax	The amount of the sales tax applied.
Total	The total amount of the sale (subtotal + sales tax).

To run an 'Invoice history report' of Vendors:

1. Select **Inventory > Invoice history report**. The details in GL categories tab appears by default.
2. Click **Vendors**.
3. Select the **site(s)**.
4. Select the **date range**.
5. Select the **compared date range**.

6. Select one or more **vendors** from the drop-down list. The following details appear on the screen:



Invoice history report - Vendors

Total invoice count — Total invoice count and the growth percentage of invoices when compared to the previous period.

Total invoice amount — Total invoice amount and the growth percentage when compared to the previous period.

Vendor	Invoice count	Subtotal	Sales tax	Total
Bhavanesh_Test	3	\$818,170.45	\$0.00	\$818,170.45
SG Time Test OCR	5	\$69,439.61	\$0.00	\$69,439.61
Sysco	1	\$1,008.50	\$2.25	\$1,010.75
SG Demo	2	\$279.93	\$0.00	\$279.93
New Vendor Demo	1	\$5.98	\$0.00	\$5.98

Additionally, the following details appear in a tabular format:

Column	Description
Vendor	Name of the vendor.

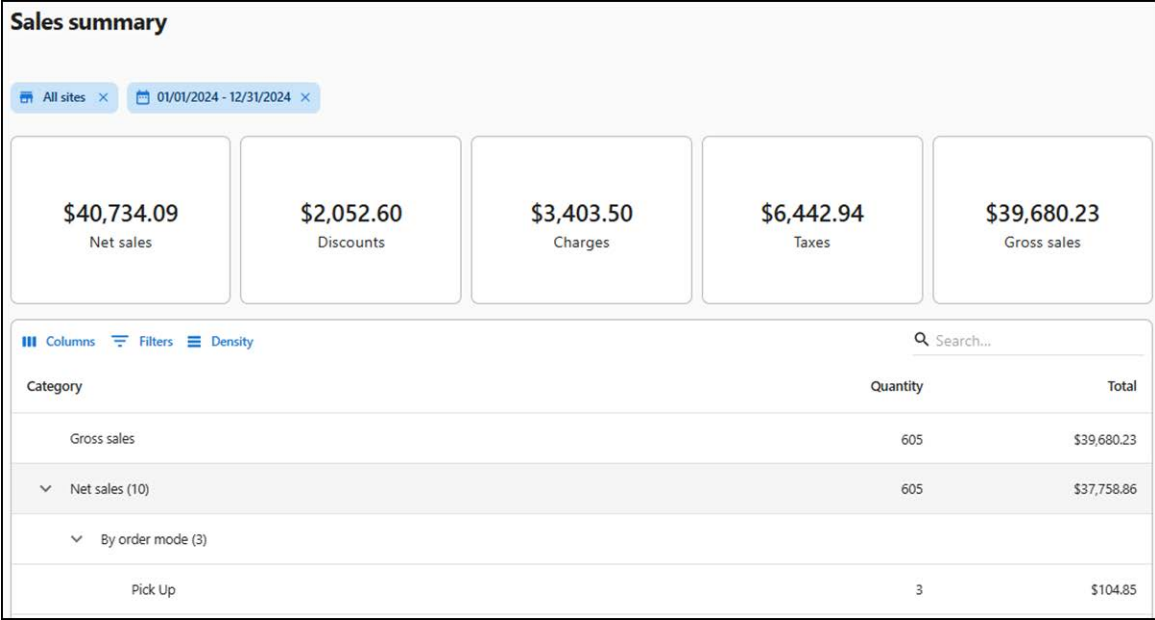
Column	Description
Invoice count	The total count of invoices.
Subtotal	The subtotal of the invoices excluding the tax amount.
Sales tax	The amount of the sales tax applied.
Total	The total amount of the sale (subtotal + sales tax).

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About Sales

The Reports section enables you to view different types of sales reports and gives you a detailed analysis of various key metrics like taxes, discounts, product mix, refunds, and more.

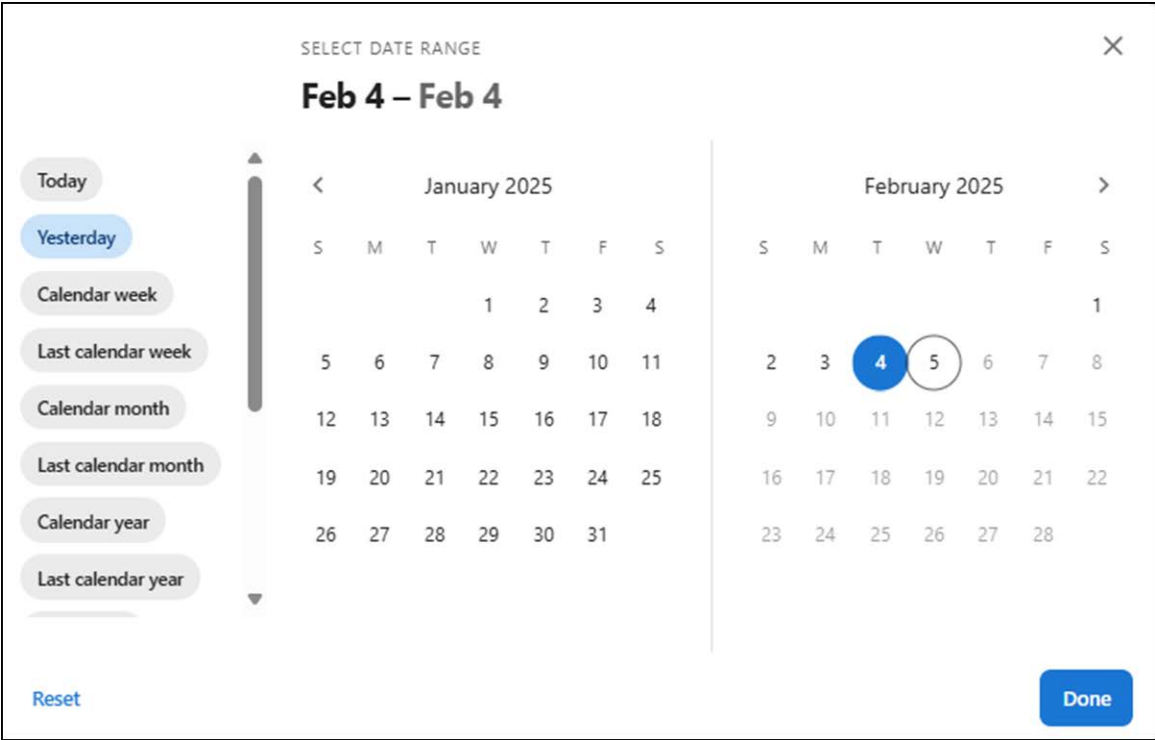
Each sales report defaults to the previous day.



'Sales summary' landing page

Calendar

Use the 'Calendar' option to pick a specific date or week. For instance, while working with invoices, select a specific date to generate the invoice; whereas, while working on scheduling, pick a specific week.



Calendar control to select a date

Date range selections

Use the predefined date range selections to easily select the period for which the data is required.

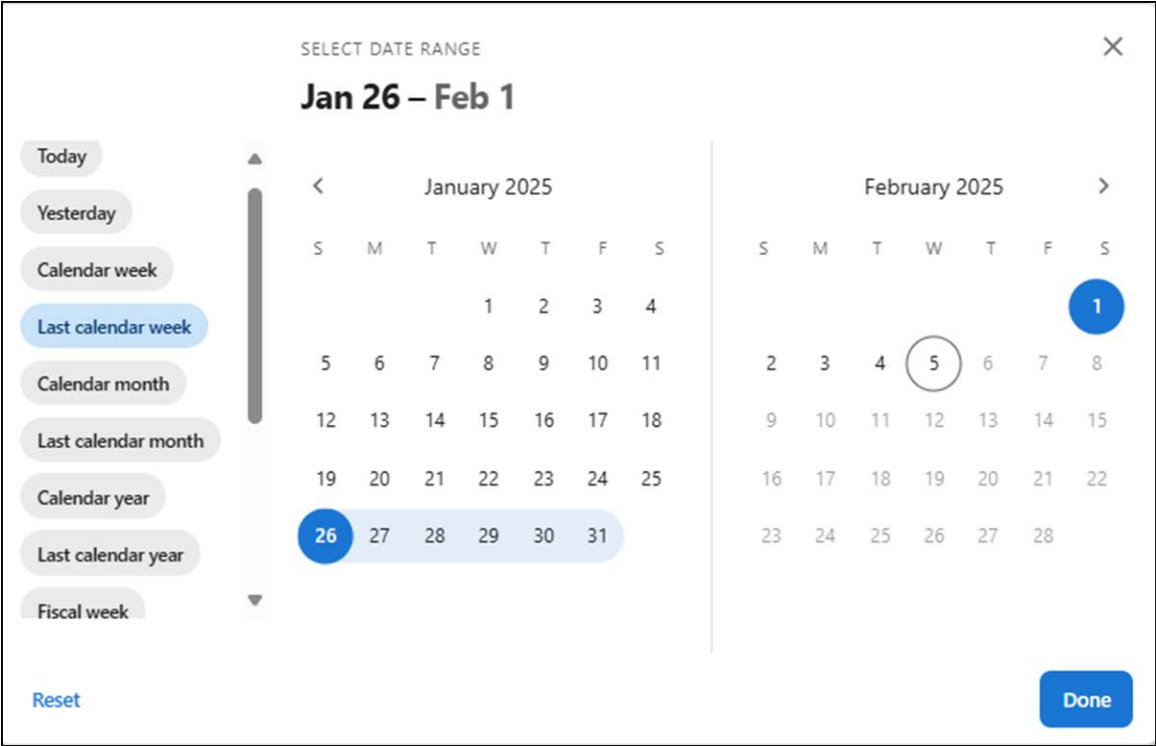


Figure 1 - 1

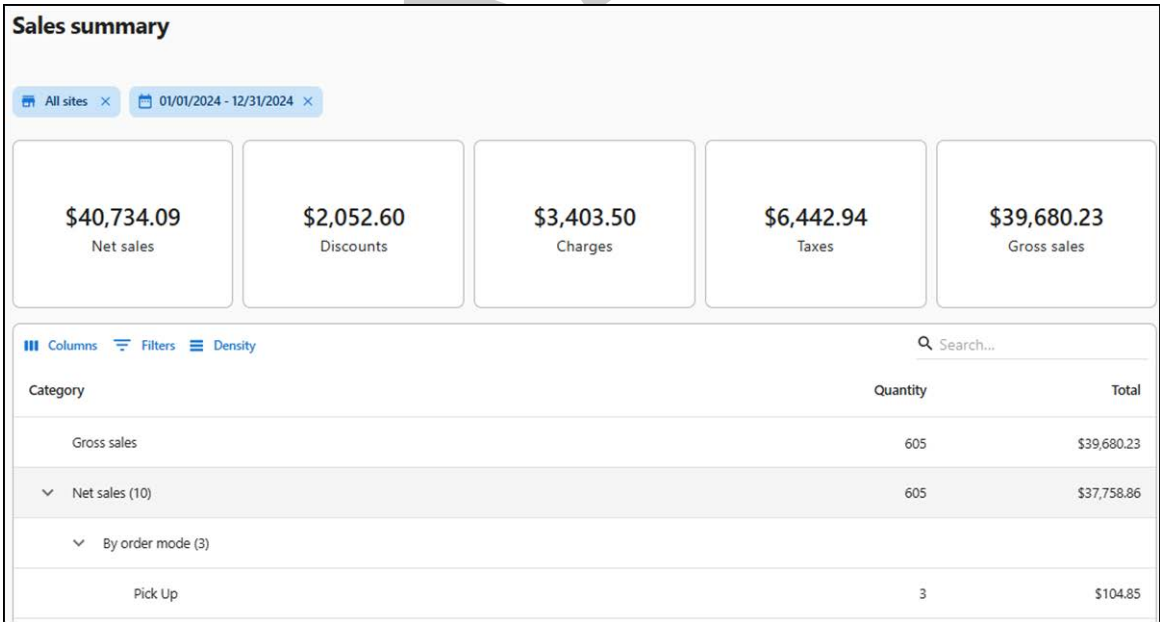
Working with sales reports

Managers and administrators can generate the following reports to monitor the sales at a restaurant:

- [Sales summary](#)
- [Profit & loss](#)
- [Product mix](#)
- [Payments](#)
- [Revenue centers](#)
- [Taxes](#)
- [Discounts](#)
- [Refunds](#)
- [Voids](#)

Sales summary

The 'Sales summary' report provides vital sales information used to monitor the progress of the restaurant..



Sales summary report

To run the 'Sales summary' report:

1. Select **Sales > Reports > Sales summary**. The 'Sales summary' report for the previous day appears by default.

The screenshot displays the 'Sales summary' report interface. A 'Site' selection dialog is open, showing a 'Select all Sites' toggle and a list of sites with checkboxes. The background report shows summary cards for 'Charges' (\$3,403.50), 'Taxes' (\$6,442.94), and 'Gross sales' (\$39,680.23), along with a table of items with columns for 'Quantity' and 'Total'.

Sales summary - Site options

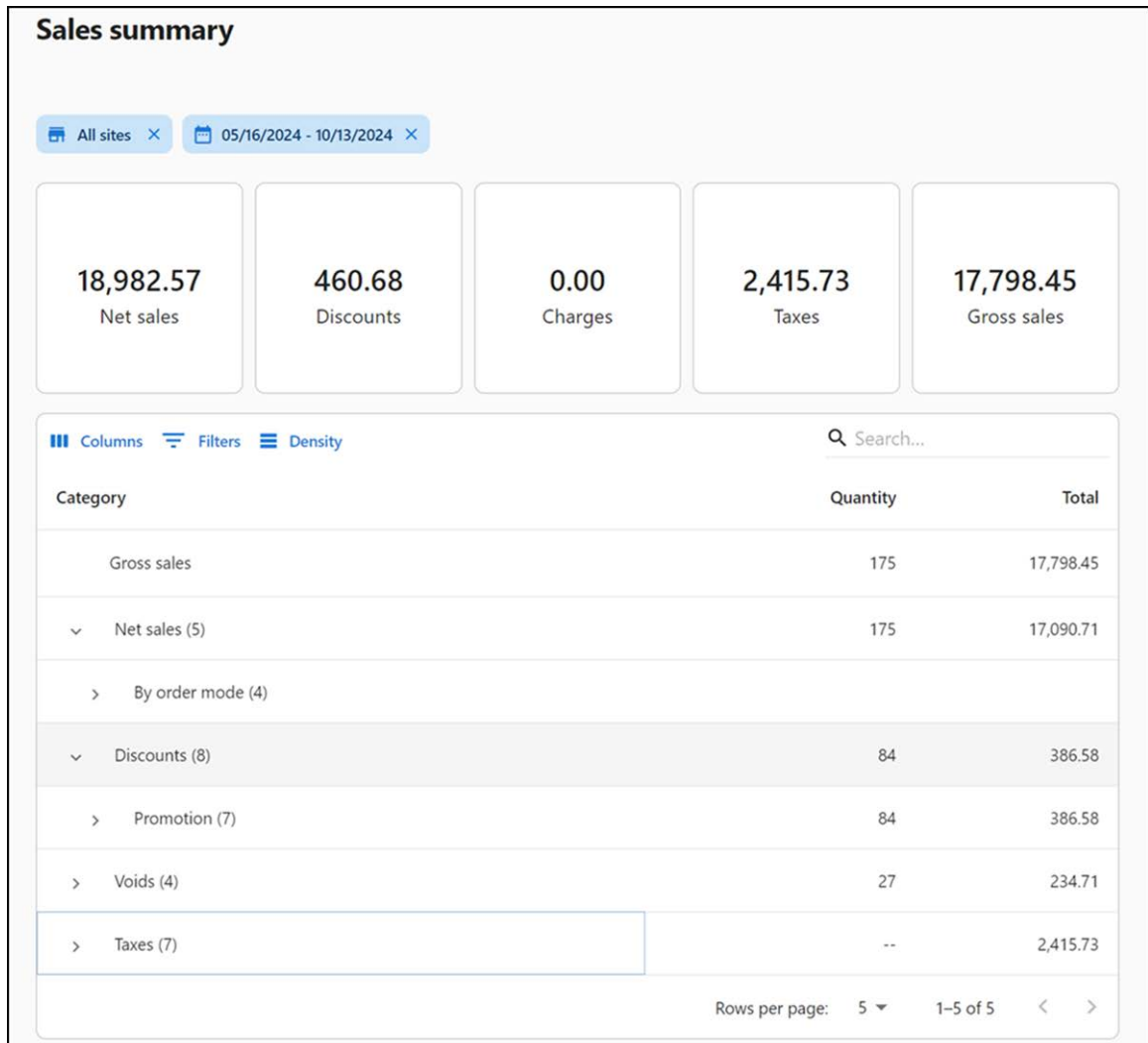
2. Select a **site** from the drop-down list.
-OR-
Click **Select all Sites** to view the 'Sales summary' for all sites.

Note

Note: Only the sites to which you have access appear in the report.

3. Click **Reset** to reset the site selection.
4. Select a **date range** from the drop-down list.

The report dynamically updates with each selected parameter and the report tiles are populated with key metric data.



Sales summary report tiles

Net sales — Displays the total Net sales amount for the selected sites. Net Sales are the sum total of item sales after Discounts, Price Overrides and Returns have been applied and exclude Inclusive Taxes. Net Sales is based on the following formula: gross sales - discounts - price overrides - returns - inclusive taxes.

Discounts — Displays the total amount of discounts, including promos and comps, applied at the selected site.

Charges — Displays the total amount of additional charges.

Taxes — Displays the total amount of taxes assessed.

Gross Sales — Displays the total Gross Sales amount. Gross Sales are the Item Sales of non-voided 'Sales' items (includes Inclusive Taxes).

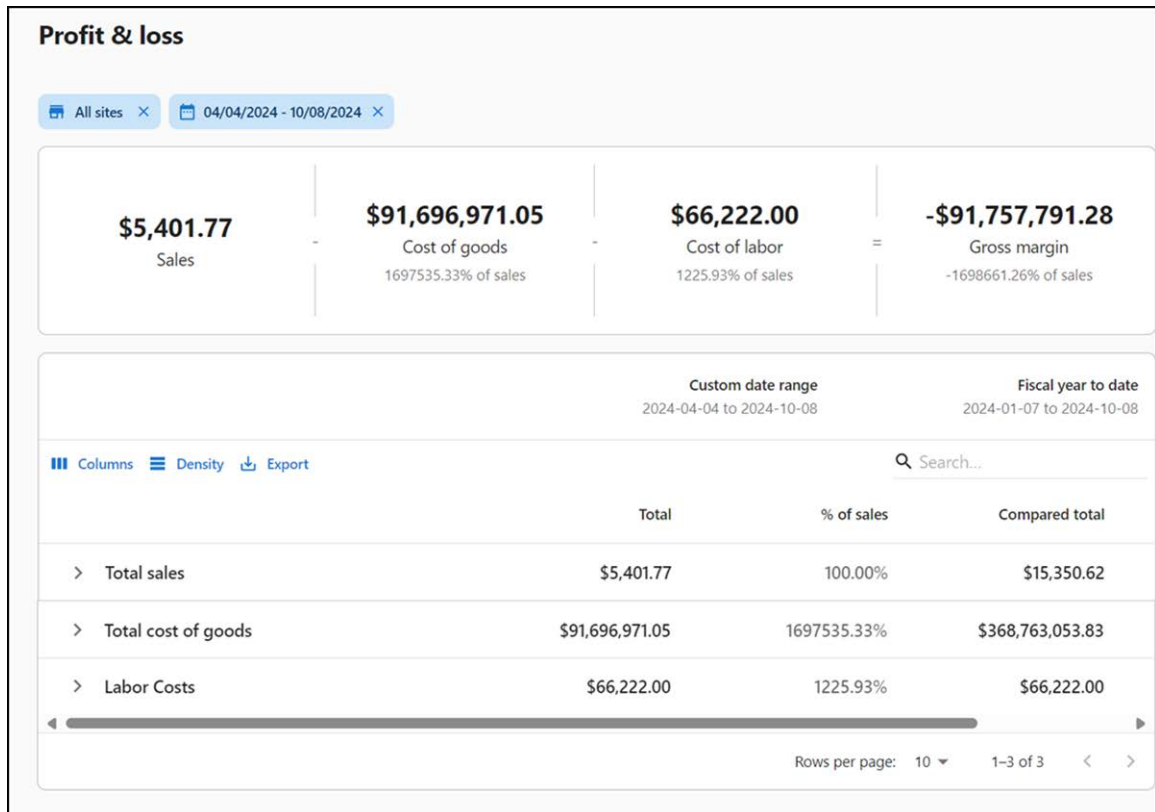
The tables are populated with additional sales details and contain the following information.

Column	Description
Category	Name of the category, such as Net Sales, Gross Sales, Taxes, and more.
Quantity	Total number of transactions for each payment type.
Total	The total sales amount including tips and gratuities for the transaction.

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Profit & loss

The 'Profit & loss (P&L)' report summarizes the revenue, costs, and expenses, of the restaurant to gross profit.



Profit & loss report tiles

To run a 'Profit & loss' report:

1. Select **Sales > Report > Profit & loss**. The 'Profit & loss' report for the previous day appears by default.
2. Select a **site** from the drop-down list.
-OR-
Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.

4. Select a **date range**.

The screenshot shows a report interface with the following data:

	Custom date range 2023-07-13 to 2024-10-15	Fiscal year to date 2024-01-07 to 2024-10-15
Total sales	-\$91.65	100.00%
Food sales	-\$32.63	35.60%
Beer sales	-\$59.02	64.40%
Total cost of goods	\$397,591.26	-433814.79%
Labor Costs	\$1,201.73	-1311.22%

Additional interface elements include: 'Columns', 'Density', 'Export', 'Search...', 'Total', '% of sales', 'Compared total', 'Rows per page: 10', and '1-3 of 3'.

Profit & loss column options



Note:

Click the **'Column options'** at the top of each column reset or sort the columns. Click the pivot (>) next to each option to sort the data further. You can expand each section to show data by item category.

The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.

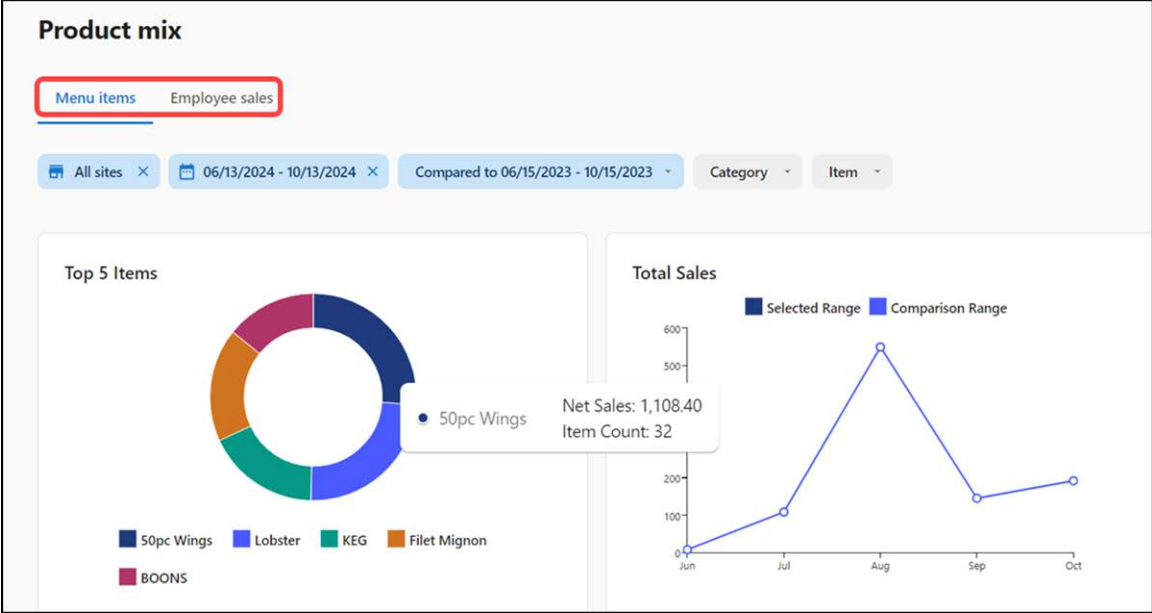
Row	Description
Total sales	Displays the total and percentage of sales. This is net sales and will break down by sales category as you drill down.
Total cost of goods	Displays the total amount the restaurant paid as a cost directly related to the sale of products. This is based on invoices entered and displays cost by category as you drill down.
Labor Costs	Display the total cost of labor according to the staff working in the restaurant. The report details the wages given to the staff and the total sales. Displays cost of labor and a total as a percent of Net Sales. Displays labor by job code as you drill down.
Total	Represents gross profit based on the calculation of sales - cost of goods sold - labor cost.
% of sales	Displays the percentage or number of items sold.

Row	Description
Compared total	Displays the total compared to the fiscal year. See “Configuring the fiscal calendar” on page 156 .
Compared % of sales	Displays the percentage of sales compared to the fiscal year.

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Product mix

The 'Product mix' report allows you to view the sales of different products and sorts the highly sold products in the given data. This provides a clear picture of the sales in the selected time frame.

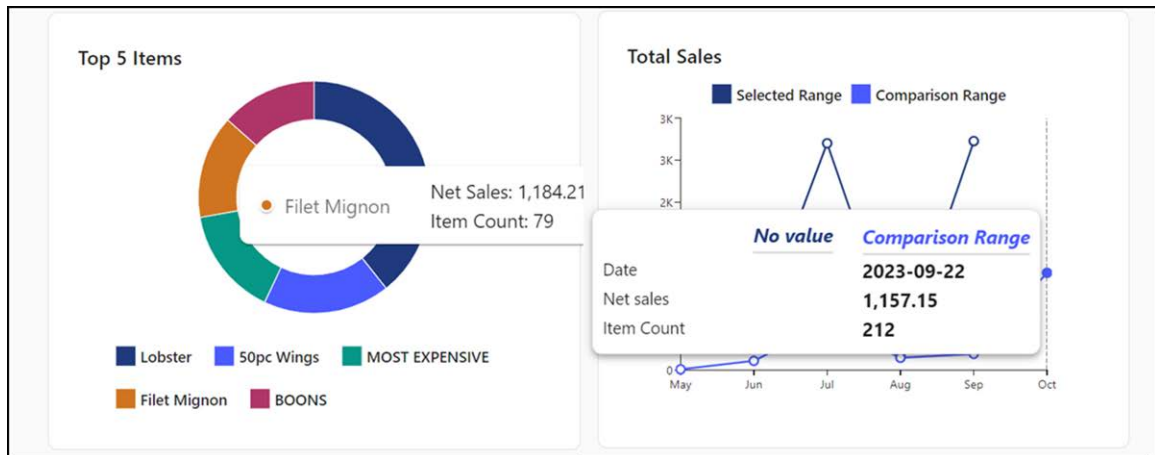


Product mix - Menu items view

The 'Product mix' report offers two views:

- Menu items
- Employee sales

Menu items view



Product mix - Top 5 Items and total sales

To run the Menu items view:

1. Select **Sales > Report > Product mix > Menu items tab**. The **Menu items** view appears with the previous date selected by default.
2. Select one or multiple **sites** from the drop-down list.
-OR-
Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.
4. Select a **date range** from the drop-down list.
5. Select a **category** from the drop-down list.
6. Select an **item** to report from the drop-down list.
7. The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.

Top 5 items — Displays data in a circle with different colors displaying each item with a color. Hover over areas of the circle to view the sales data of the item.

Total Sales — Displays data as a line graph on the axes showing the sales along with days/months/years, based on the date range selection. Hover over the line graph to show the net sales and item count of the selected range along with the comparison range.

8. Select **List modifiers with item sold**, to view the modifier quantity details of the respective category.

Category	Sold Quantity	Modifier Quantity	Item Sales	% of Catego...	% of Total S...
> BEER (10)	230	0	1,447.25	100.00%	7.62%
> DESSERT (2)	25	0	104.25	100.00%	0.55%
> FOOD (290)	1180	620	13,520.02	100.00%	71.22%
> LIQUOR (32)	71	11	301.75	100.00%	1.59%
> N/A BEVERAGE (10)	130	0	274.30	100.00%	1.45%
> WINE (16)	42	0	3,335.00	100.00%	17.57%

Product mix - Total sales

The data in the table appears with the following information:

Column	Description
Category	Specifies the category of the item in which it is listed.
Sold quantity	Displays the count of all menu items sold, excluding modifiers.
Modifier quantity	Displays the count of all the modifiers sold.
Item Sales	Displays the total amount of item sales.
% of Category	Displays the percentage of parent item category sales to which the item belongs.
% of Total Sales	Displays the percentage of total sales the item represents.

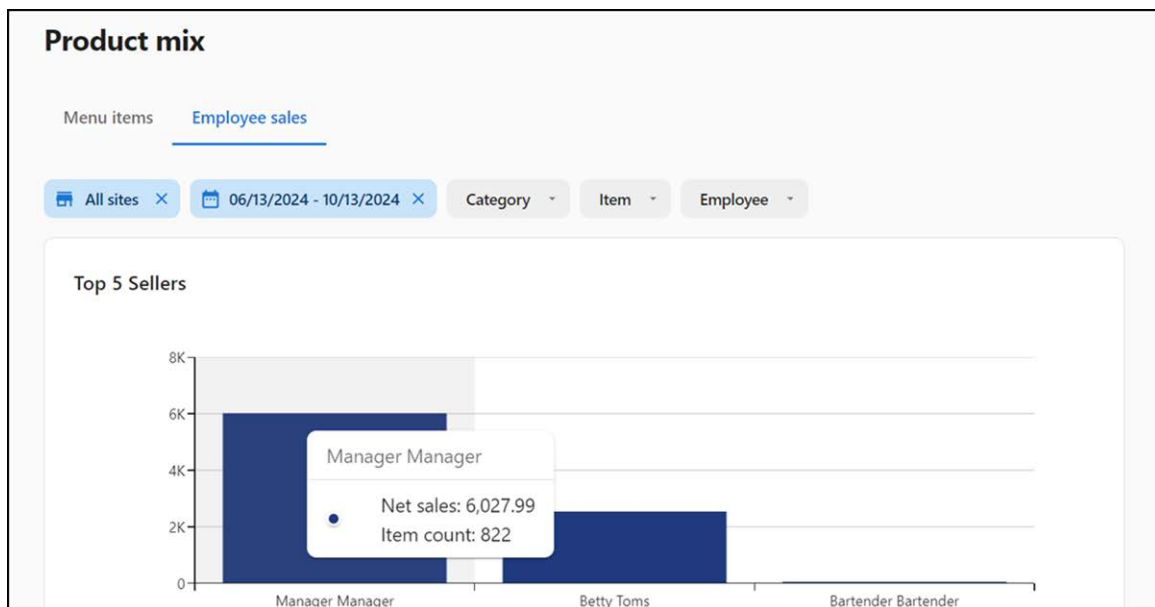
Note

You can sort the items by clicking the pivot(>) next to each item of the first three columns. Clicking the pivot gives you detailed sales data of each item sold and also modifier data sold accordingly.

Employee sales view

To run the Employee sales view:

1. Select **Sales > Report > Product mix > Employee sales** tab. The **Employee sales** view for the previous date appears by default.
2. Select the **site** to report from the drop-down list.
-OR-
Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.
4. Select a **date range** to report from the drop-down list.



Product Mix - Employee sales view

The report dynamically updates with each selected parameter. Reporting data appears on the following tile.

Top 5 sellers — Displays the net sales amount in the form of bars for the top 5 employees. Hover over the bar to show the net sales and item count.

Category	Sold Quantity	Item Sales
▼ Bartender Bartender (7)	5	27.04
> BEER (3)	3	10.25
> FOOD (2)	2	16.79
> Betty Toms (71)	322	2,519.49
▼ Manager Manager (137)	822	6,027.99
> BEER (10)	69	952.50
> DESSERT (2)	9	34.75
> FOOD (83)	652	4,141.48
> LIQUOR (15)	23	76.50
> N/A BEVERAGE (9)	45	87.76
> WINE (12)	24	735.00

Columns Filters Density Search...
Rows per page: 10 1-3 of 3

Product mix - Total sales summary

The data in the table appears with the following information:

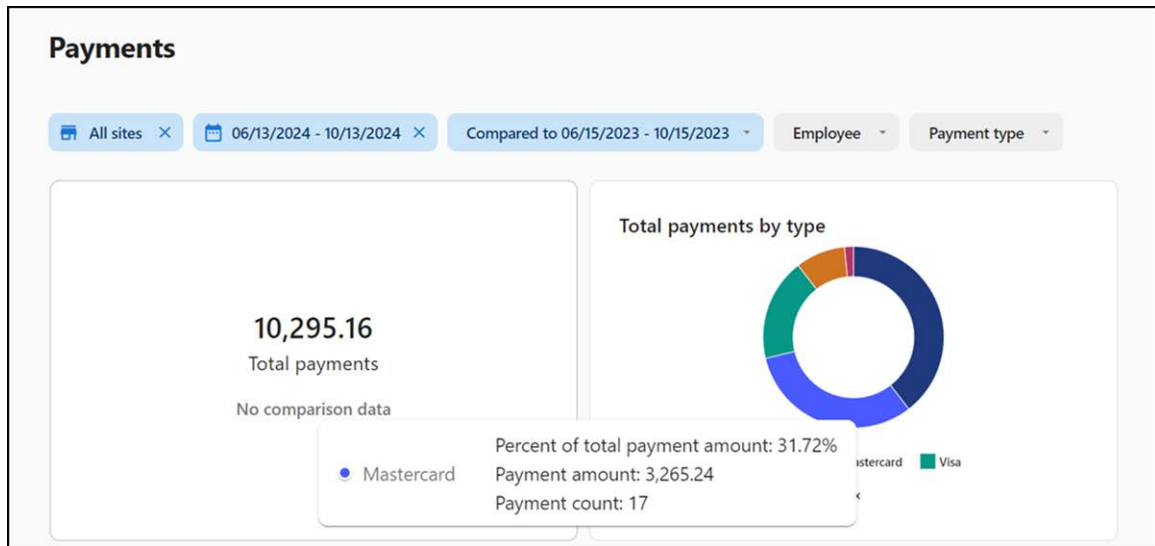
Column	Description
Category	Category of the item or a modifier.
Sold quantity	Total count of the items sold.
Item sales	Displays the total amount of item sales.

To refine your search:

1. Select the **category** of items from the drop-down list. The data appears based on the selected category.
2. Select the **item** from the drop-down list.
3. Select the **employee** from the drop-down list. When the search is refined, the data is generated for the particular selection in that particular date range.

Payments

The 'Payments' report displays details of the payments accepted at the restaurant.

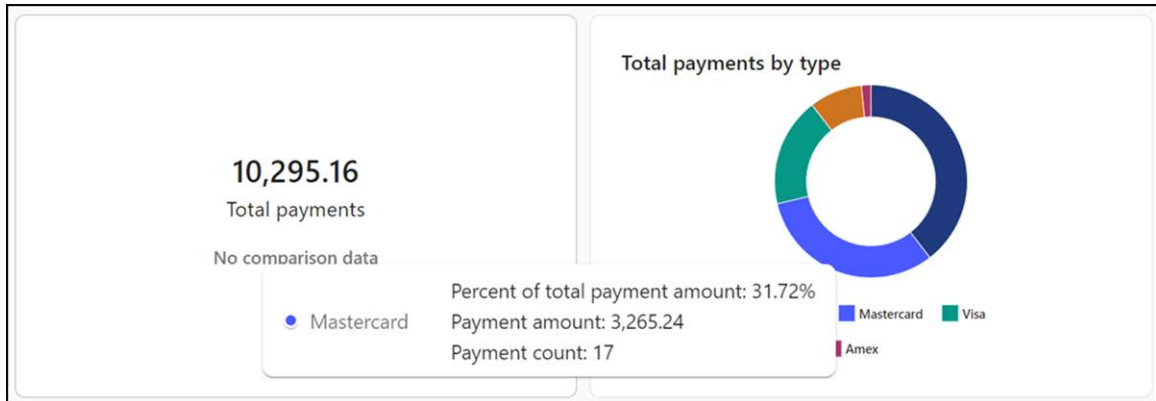


Sales reports - Payments

To run the Payments report:

1. Select **Sales > Report > Payments**. The **Payments** report for the previous date appears by default.
2. Select the **site** from the drop-down list.
-OR-
Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.
4. Select a **date range** from the drop-down list.
5. To refine your search you can select multiple/all the **Payment types** to view the data.
You can select /multiple/all employees from the drop-down list to view the payment data specific to the selected employees.

The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.



Sales report - Payments and total payments by type

Total payments — Displays the total payments for the selected date range and sites. If you do not select a date range or site, total payments to date appear.

Total payments by type — Displays the data in a circle with colors differentiating the type of payment made. Hover over areas of the circle to view the percent of the total payment amount, payment amount, and payment count.

Date of Business	Site	Employee	Transaction #	Date/Time	Payment type
10/10/2024	2004 - ASM Lab ...	Manager Manager	20003	10/10/2024 11:02...	CREDIT_CARD
10/10/2024	2004 - ASM Lab ...	Manager Manager	20004	10/10/2024 11:02...	CASH
10/10/2024	2004 - ASM Lab ...	Manager Manager	20002	10/10/2024 11:02...	CREDIT_CARD
10/10/2024	2004 - ASM Lab ...	Manager Manager	20001	10/10/2024 11:01...	CASH
10/04/2024	2004 - ASM Lab ...	Betty Toms	20006	10/04/2024 3:15 ...	CASH
10/04/2024	2004 - ASM Lab ...	Betty Toms	20005	10/04/2024 3:14 ...	CASH
10/04/2024	2004 - ASM Lab ...	Betty Toms	20004	10/04/2024 3:13 ...	CREDIT_CARD
10/04/2024	2004 - ASM Lab ...	Betty Toms	20003	10/04/2024 3:12 ...	CREDIT_CARD
10/04/2024	2004 - ASM Lab ...	Betty Toms	20002	10/04/2024 1:03 ...	CREDIT_CARD
10/04/2024	2004 - ASM Lab ...	Betty Toms	20001	10/04/2024 1:01 ...	CASH

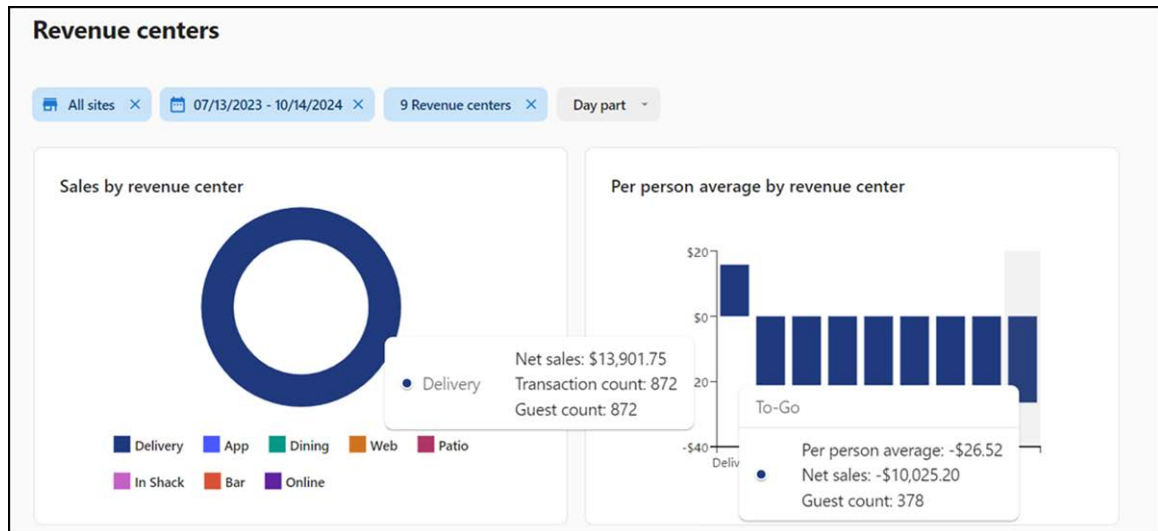
Payments summary

The data in the table appears with the following information:

Column	Description
Date of business	The date of transaction.
Site	Name of the site.
Employee	Name of the employee.
Transaction #	Transaction number for reference.
Date/Time	Date and time of the transaction.
Payment type	The type of payment, such as cash or card.
Payment name	The name of payment through which the amount is paid. For example, Credit card, DoorDash, OLO etc.
Payment amount	The total amount paid by the consumer.
Tip amount	The tip amount given by the consumer.

Revenue centers

The 'Revenue centers' report displays the sales related information by different areas of the restaurant. Revenue centers are different areas in the restaurant, such as dining area, take-out service, and bar area. You can generate the report by different revenue centers based on day part and other options, such as guest count, discount amount, tax amount, and more.



Sales reports - 'Revenue centers'

To run the Revenue centers report:

1. Select **Sales > Reports > Revenue centers**. The 'Revenue centers' report for the previous day appears by default.
2. Select a **site** from the drop-down list.
-OR-
Click **Select all Sites** to view the report for all sites.
3. Click **Reset** to reset the site selection.
4. Select a **date range** from the drop-down list.
5. Select one or multiple **revenue centers** from the drop-down list.
6. Select one or multiple **dayparts** from the drop-down list.

The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.

Sales by revenue center — Displays the total sales generated at the revenue center.

Per person average by revenue center — Displays the per person average (PPA) by revenue center. This is based on the following calculation: total sales / number of customers.



Note

To get quick access to data, hover the cursor over the bars in each tile. A window pops out to display the data based on the inputs provided.

Site	Net sales	Tax amount	Discount amount	Other charges amount	Gross sales	Transaction
1 - Dallas (9)	-\$77.64	\$9.12	\$57.15	\$3.74	-\$47.54	
Delivery (2)	-\$136.00	\$1.04	\$57.15	\$3.78	-\$105.90	
Online (2)	\$20.42	\$4.00	\$0.00	-\$0.02	\$20.42	
Web (2)	\$37.94	\$4.08	\$0.00	-\$0.02	\$37.94	
15 - TMG 015 Denver CO Auro	\$22,753.79	\$361.23	\$1,559.20	\$564.14	\$22,849.86	
5 - hsp-cbo - 1 (17)	\$485.16	\$9.04	\$33.10	\$12.22	\$485.16	
560641 - Your Pie 013 Clemsor	\$703.16	\$6.66	\$36.50	\$18.54	\$703.16	
DE ASM Test Site - DE ASM Tes	-\$81,889.20	\$5,905.10	\$68,290.27	\$3,153.11	-\$49,193.11	

Sales Reports - 'Revenue centers' report view

The data appears in a tabular form with the following information.

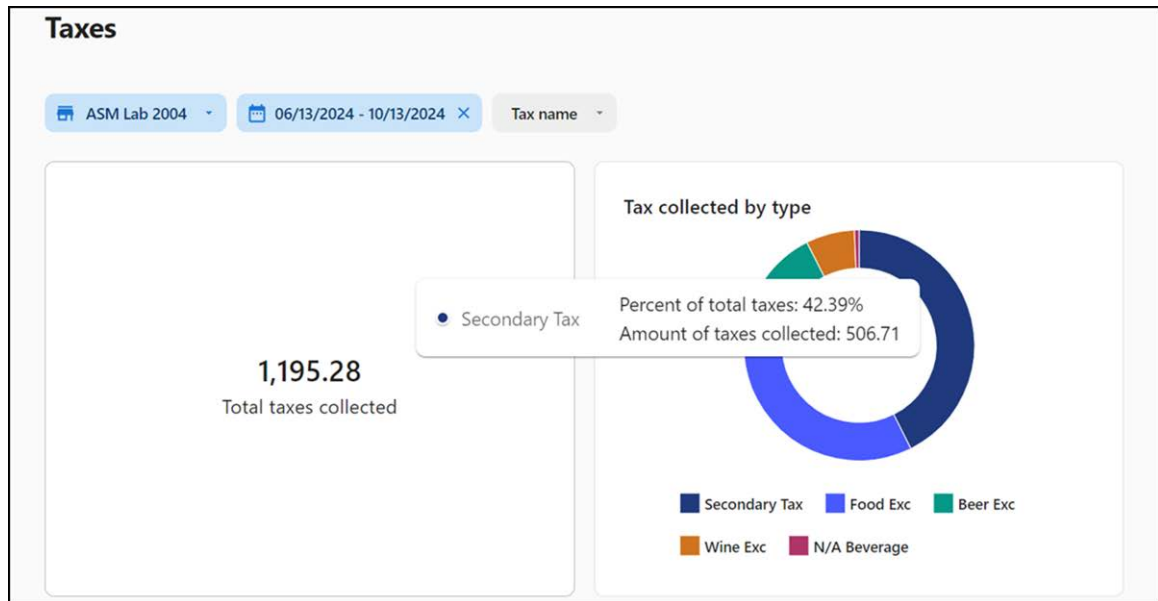
Column	Description
Site	Name of the site or store.
Net Sales	The net sales after required exemption.
Tax amount	Total amount of taxes collected for a transaction.
Discount amount	Total amount of discounts, such as vouchers, coupons, and more.
Other charges amount	Total amount of surcharges applied to a transaction.
Gross sales	Gross sales of a transaction.
Transaction count	Count of closed/non-voided transactions.
Guest count	Total number of guests served on a transaction.

Column	Description
Per person average	Net sales of a transaction are divided by the number of guests on the transaction.
Transaction average	Total net sales divided by the number of non-voided transactions.

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Taxes

The 'Taxes' report displays the amount of tax collected on each transaction and displays the amount levied as tax and deducted from the gross amount.



Sales reports - Taxes

To run the Taxes report:

1. Select **Sales > Report > Taxes**. The 'Taxes' report for the previous day appears by default.
2. Select a **site** from the drop-down list.
-OR-
Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.
4. Select a **date range** from the drop-down list.
5. Select the **Tax name** from the drop-down list.

The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.

Total taxes collected — Displays the total amount of tax collected.

Tax collected by type — Displays the total amount of tax collected based on the tax type. The data appears in a circle with different colors differentiating the type of tax. Hover over areas of the circle to view the percent of the total taxes and the amount of taxes collected.

Tax name	Tax type	Tax rate (%)	Sales amount	Tax collected
Secondary Tax	TAX_EXCLUSIVE	8.25%	6,141.75	506.71
Food Exc	TAX_EXCLUSIVE	8.25%	6,070.92	500.86
Beer Exc	TAX_EXCLUSIVE	9.05%	1,023.50	92.66
Wine Exc	TAX_EXCLUSIVE	11.05%	735.00	81.23
N/A Beverage	TAX_EXCLUSIVE	8.00%	97.26	7.78

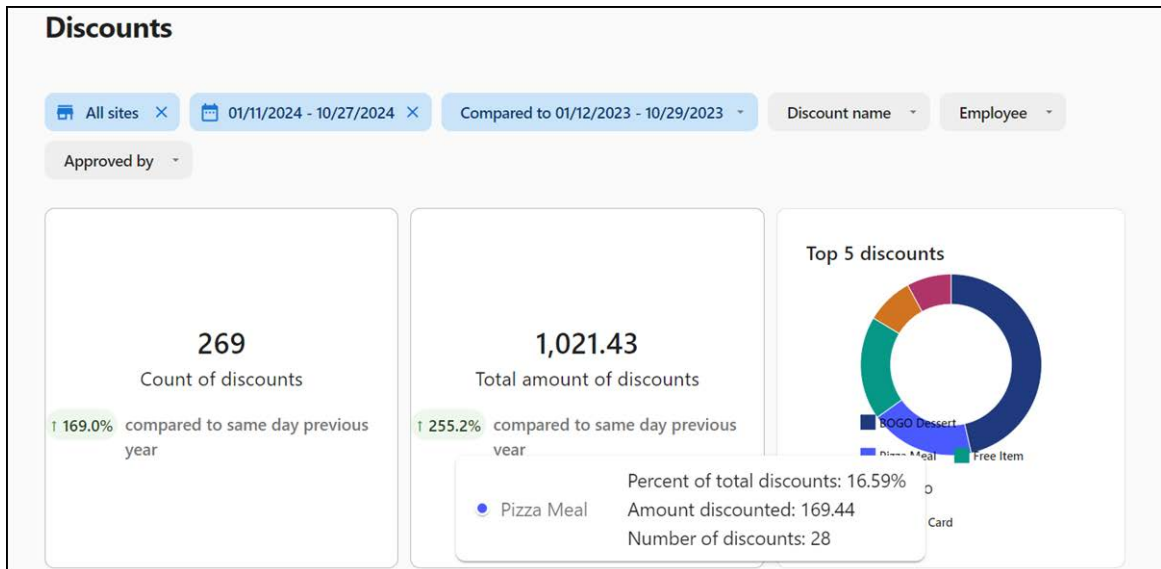
Sales Reports - Taxes summary

The data appears in the form of a table with the following information.

Column	Description
Tax name	Name of the tax category.
Tax type	Type of tax applied.
Tax rate (%)	Percentage of the amount to be deducted.
Sales amount	Amount to be collected as tax for that tax category.
Tax collected	Total amount collected as tax.

Discounts

The Discounts report shows all discounts, including promotions and comps, made at the store for the selected date range. This report helps you understand the effect of discounts on sales.



Sales reports - Discounts

To run the Discounts report:

1. Select **Sales > Report > Discounts**. The 'Discounts' report for the previous day appears by default.
2. Select a **site** from the drop-down list.
-OR-
Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.
4. Select a **date range**.
5. Select the **Discount name** from the drop-down list.
6. Select the **Employee** from the drop-down list.
7. Select **Approved by** to display the discount type, the discount amount, and who approved the discount.

The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.

Count of discounts — Displays the total number of discounts.

Total amount of discounts — - Displays the total amount of discounts.

Top 5 discounts — Displays the top five types of discounts.

Date of business	Site	Employee	Approved by	Transaction #	Date/Time
10/14/2024	2004 - ASM Lab ...	Betty Toms	Betty Toms	20003	10/14/2024 3:35 ...
10/10/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20003	10/10/2024 11:02...
10/10/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20001	10/10/2024 11:01...
10/04/2024	2004 - ASM Lab ...	Betty Toms	Betty Toms	20006	10/04/2024 3:15 ...
10/04/2024	2004 - ASM Lab ...	Betty Toms	Betty Toms	20004	10/04/2024 3:13 ...
10/04/2024	2004 - ASM Lab ...	Betty Toms	Betty Toms	20003	10/04/2024 3:12 ...
09/16/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20007	09/16/2024 10:57...
09/16/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20005	09/16/2024 10:53...
09/13/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20003	09/13/2024 7:38 ...
09/12/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	10011	09/12/2024 3:17 ...

Sales reports - Discounts table

The data appears in the form of table with the following information:

Column	Description
Date of Business	The date of transaction.
Site	Name of the site.
Employee	Name of the employee.
Approved by	Authorized person to approve the discount.
Transaction	Transaction number for reference.
Date/Time	Date and time of transaction.
Discount type	The type of discount applied.
Discount name	Name of the discount applied.
Discount count	A number of discounts applied.
Discount amount	Total discounted amount.

Refunds

The Refunds report displays details of refunds performed in the restaurant.



Sales Reports - Refunds

To run the Refunds reports:

1. Select **Sales > Reports > Refunds**. The 'Refunds' report for the previous day appears by default.
2. Select a **site** from the drop-down list.
-OR-
Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.
4. Select a **date range**.
5. Select the **Employee** from the drop-down list.

The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.

Refund count — Displays the total number of refunds issued.

Total refunded amount — Displays the total amount of refunds issued to the customer.

Business date	Site	Employee	Transaction #	Date/Time	Payment type
10/10/2024	2004 - ASM Lab ...	Manager Manager	20004	10/10/2024 11:02...	Cash\$\$\$\$\$
10/04/2024	2004 - ASM Lab ...	Betty Toms	20005	4/10/2024 3:14 pm	Cash\$\$\$\$\$
08/26/2024	2004 - ASM Lab ...	Betty Toms	20008	26/8/2024 10:22 ...	Cash\$\$\$\$\$
08/08/2024	2004 - ASM Lab ...	Manager Manager	20005	8/8/2024 2:34 pm	Cash\$\$\$\$\$
07/29/2024	2004 - ASM Lab ...	Manager Manager	20003	29/7/2024 11:48 ...	Cash\$\$\$\$\$
07/23/2024	2004 - ASM Lab ...	Manager Manager	20003	23/7/2024 1:06 pm	Cash\$\$\$\$\$
07/09/2024	2004 - ASM Lab ...	Manager Manager	20003	9/7/2024 10:55 am	Cash\$\$\$\$\$
07/08/2024	2004 - ASM Lab ...	Manager Manager	20004	8/7/2024 1:58 pm	Cash\$\$\$\$\$
06/03/2024	2004 - ASM Lab ...	Manager Manager			Cash\$\$\$\$\$
05/20/2024	2004 - ASM Lab ...	Manager Manager	20008	20/5/2024 9:37 am	Cash\$\$\$\$\$

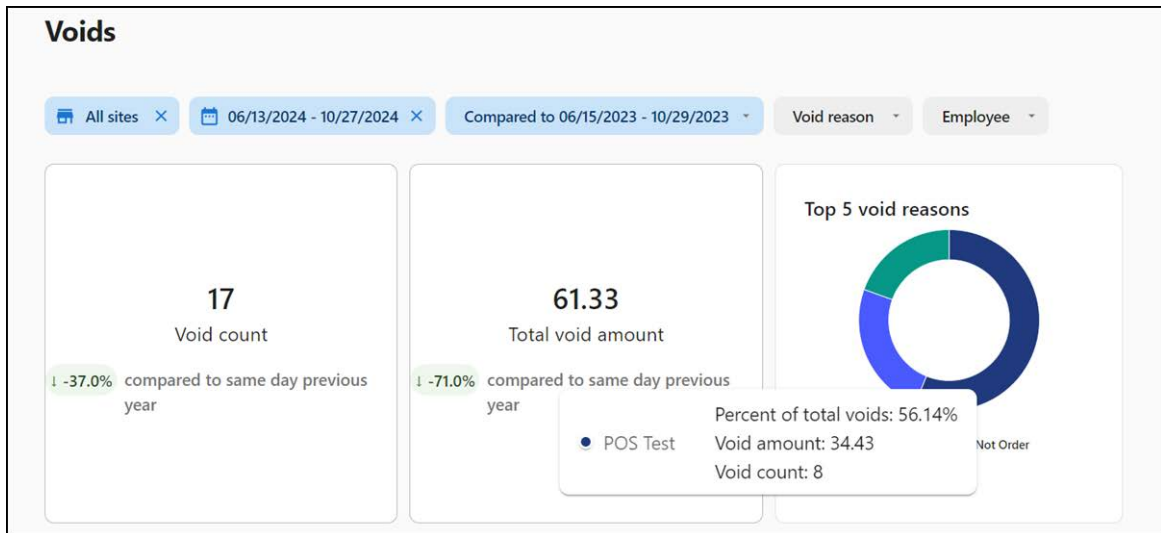
Sales reports - Refunds table

The data appears in the form of table with the following information:

Column	Description
Business date	Date of the transaction.
Site	Name of the site.
Employee	Name of the employee.
Transaction	Transaction number for reference.
Date/Time	Date and time of the transaction.
Payment type	Type of payment made by cash, card etc.
Refund amount	Total refunded amount.

Voids

The Voids report displays the number of voids performed at the restaurant. Deleting an item or guest check after finalization of results is paid as void. Finalization occurs when you submit the items for order to the kitchen, back out of the order, or press the Home button on your mobile device, and more.



Sales reports - Voids

To run the Voids report:

1. Select **Sales > Report > Voids**. The 'Voids' report for the previous day appears by default.
2. Select a **site** from the drop-down list.
3. Select a **date range** from the drop-down list.
4. Select the **void name** from the drop-down list.
5. Select the **employee's name** from the drop-down list.

The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.

Void count: — displays the total number of void transactions.

Total void amount: — displays the total amount of voids.

Top 5 void reasons: — Displays the top five reasons for performing the void. The data appears in a circle with different colors displaying each void with a color. Hover over the circle to view the percent of total voids, the void amount, and the void count of that item.

Business date	Site	Employee name	Approved by	Transaction #	Date/Time
10/10/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20001	10/10/2024 11:01...
09/16/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20006	09/16/2024 10:55...
09/13/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20006	09/13/2024 7:43 ...
09/13/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20006	09/13/2024 7:43 ...
09/13/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20006	09/13/2024 7:43 ...
09/12/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	10012	09/12/2024 3:19 ...
09/12/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	10012	09/12/2024 3:19 ...
09/12/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	10012	09/12/2024 3:19 ...
08/26/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20004	08/26/2024 10:19...
08/26/2024	2004 - ASM Lab ...	Manager Manag...	Manager Manag...	20004	08/26/2024 10:19...

Sales reports - Voids table

The data appears in the form of table with the following information:

Column	Description
Business Date	Date of the transaction.
Site	Name of the site.
Employee	Name of the employee.
Approved by	Authorized person to approve the void.
Transaction	Transaction number for reference.
Date/Time	Date and time of transaction.
Void reason	Reason for the void.
Void item	Item selected for void.
Void count	Total number of voids.
Void amount	Total amount in void.

Viewing transactions

Use the Sales > Transactions function to provide transaction-level summary data for all transactions, or checks, processed in the restaurant.

Business d...	Site	Transaction #	Employee	Customer name
6/27/2024	2004 - ASM Lab 2004	20002	Manager Manager TS	
6/27/2024	2004 - ASM Lab 2004	20003	Manager Manager TS	
7/8/2024	2004 - ASM Lab 2004	20001	Manager Manager TS	
7/8/2024	2004 - ASM Lab 2004	20002	Manager Manager TS	
7/8/2024	2004 - ASM Lab 2004	20003	Manager Manager TS	
7/8/2024	2004 - ASM Lab 2004	20004	Manager Manager TS	
7/8/2024	2004 - ASM Lab 2004	20005	Betty Toms	

Sales reports - 'Transaction' report

The 'Transactions' report offers two views:

- **View transactions** — Provides a condensed view of transaction details, with the ability to open a customer receipt style view of the transaction. This is helpful when researching a transaction and reprinting a transaction.
- **Export view** — Provides a tabular view of the full set of key transaction metrics. This view is helpful when you need to work with exported data externally, or when importing into third-party systems.

Running the 'View transactions' view

To run the Transactions > 'View transactions' view:

1. Select **Sales > Transactions**. The 'Transactions view' for the previous day appears by default.
2. Select a **site** from the drop-down list.

-OR-

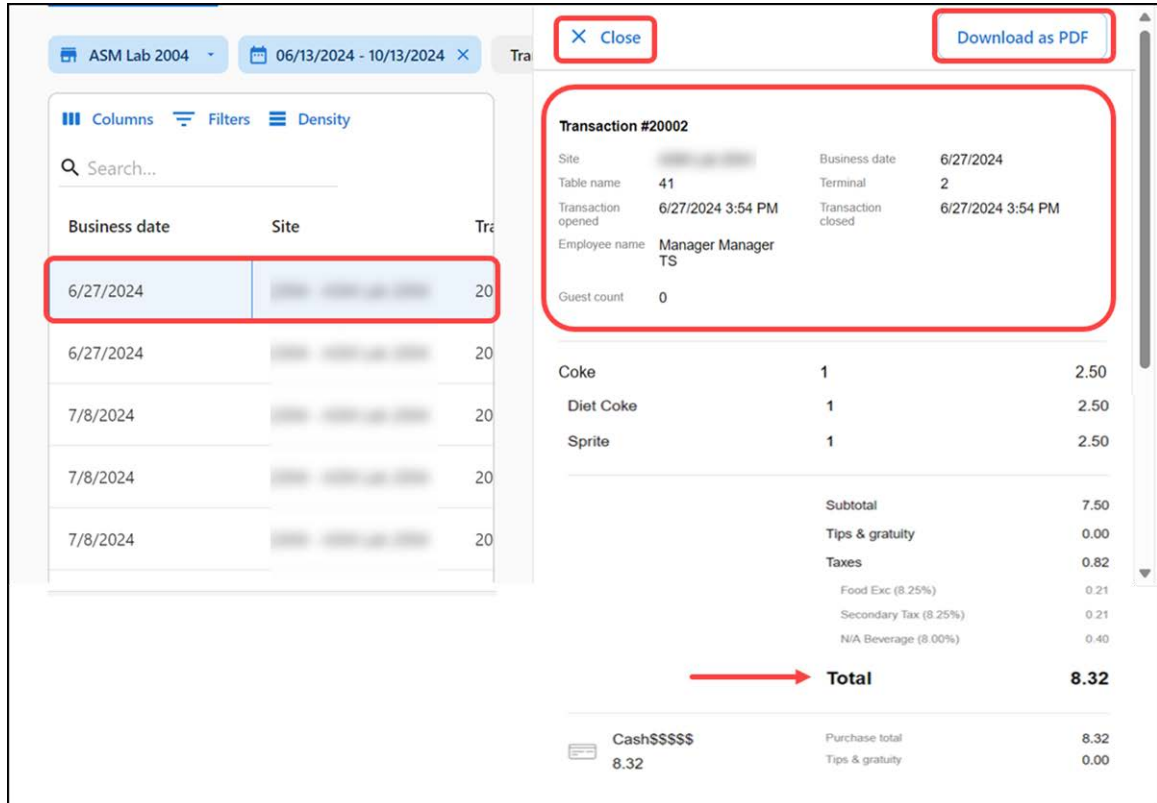
Click **Select all Sites** to view report for all sites.

3. Click **Reset** to reset the site selection.
4. Select a **date range** or select from the list on the left side of the drop-down.
5. Select the **Transaction type** from the drop-down list.

The transactions appear in tabular form with the following information:

Column	Description
Business date	Business date associated with the transaction.
Site	Site name and ID.
Transaction #	POS transaction number.
Employee	Name of the employee.
Customer name	Name of the customer.
Table name	Name of the table.
Terminal	Terminal at which the billing was done.
Open time	Date and time when the transaction was opened.
Close time	Date and time when the transaction was closed.
Payment name	The type of payment applied to the transaction.
Amount	Total amount of the transaction.
Card information	Last four digits of the payment card, if available.

Click any **transaction**, the slide out window appears with the transaction details (such as site name, transaction number, table number, transaction date, ticket items, item price, total transaction amount and more). Also, it allows you to print the transaction details in PDF.



Transaction details

Click **Close** to exit the transaction details window.

To run the Transactions > Export view report:

1. Select **Sales > Transactions > Export view**. The 'Transactions export' report for the previous date appears by default.
2. Select a **site** from the drop-down list.
-OR-
Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.

- Select a **date range** from the drop-down list.

The screenshot shows the 'Transactions' interface. At the top, there are tabs for 'View transactions' and 'Export view'. Below the tabs, there are filters for 'All sites' and a date range '06/13/2024 - 10/27/2024'. The main area contains a table with columns: Business date, Site, Employee, Transaction #, Transaction open time, and Transaction close time. The table lists several transactions with their respective dates, sites, employees, and times.

Business date	Site	Employee	Transaction #	Transaction open time	Transaction close time
10/14/2024	2004 - ASM Lab ...	Betty Toms	20003	10/14/2024 3:35 PM	10/14/2024 3:35 PM
10/14/2024	2004 - ASM Lab ...	Manager Manag...	20001	10/14/2024 1:55 PM	10/14/2024 1:55 PM
10/14/2024	2004 - ASM Lab ...	Manager Manag...	20001	10/14/2024 1:55 PM	10/14/2024 1:55 PM
10/10/2024	2004 - ASM Lab ...	Manager Manag...	20002	10/10/2024 11:01 AM	10/10/2024 11:01 AM
10/10/2024	2004 - ASM Lab ...	Manager Manag...	20004	10/10/2024 11:02 AM	10/10/2024 11:02 AM
10/10/2024	2004 - ASM Lab ...	Manager Manag...	20003	10/10/2024 11:02 AM	10/10/2024 11:02 AM
10/10/2024	2004 - ASM Lab ...	Manager Manag...	20001	10/10/2024 11:00 AM	10/10/2024 11:00 AM

Export view

The transactions appear in tabular form with the following information:

Column	Description
Business Date	Date of the transaction.
Site	Name of the site where the transaction is performed.
Employee	Name of the employee, who performed the transaction.
Transaction	Transaction reference number.
Transaction open time	(Guest check) Starting date and time transaction.
Transaction close time	(Guest check) Closing date and time transaction.
Day part	Part of the day, when the transaction is performed.
Revenue center	Name of the revenue center associated with the transaction.
Order mode	Transaction order mode. For example: Takeout.
Order source	Transaction source.
Order destination	Order destination.

Column	Description
Payment name	The name of the payment through which the amount is paid. For example, Credit card, Door Dash, OLO etc.
Refund?	Status of amount refunded if any.
Table name	Name of the table.
Guest count	Total number of guests served.
Item count	Total number of items ordered.
Net sales	The transaction net sales after required exemption.
Gross sales	Gross sales of a transaction.
Void amount	Total amount of void amount to be cleared.
Promo amount	Total amount given as discount under promotions/coupons etc
Comp amount	Total discount amounts from discounted transactions/items where Discount Type = 'COMPENSATION'
Other charges amount	Other charges levied, if any.
Tax amount	Total taxable amount.

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POS event log

The POS event log report enables you to view details of the different types of events performed on the POS, such as clock-in, clock-out, order items, void items, and more.

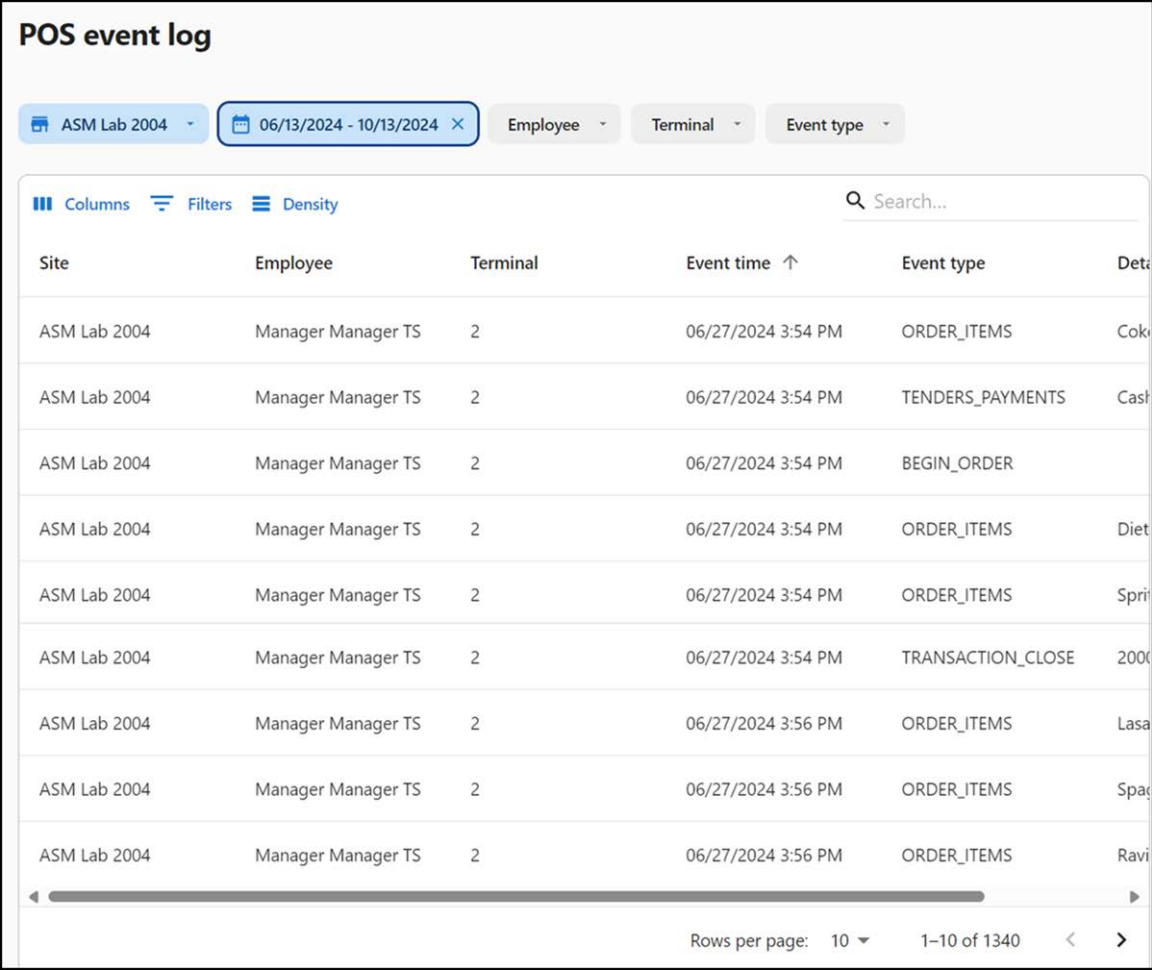


Warning

You need to limit the date range for the query because selecting large ranges can negatively impact the performance of the report.

To run the POS event log report:

- 1. Select **Sales > POS event log**. The POS event log screen appears.



POS event log screen

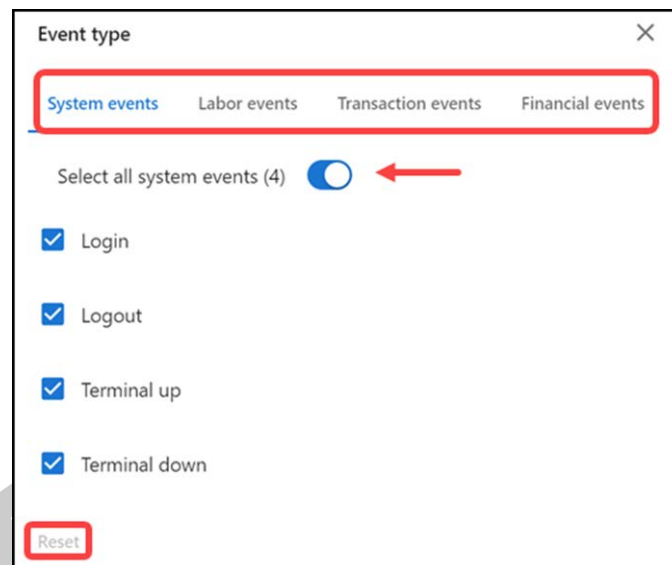
- 2. Select a **site** to report from the drop-down list.

-OR-

Click **Select all Sites** to view the report for all sites.

3. Click **Reset** to reset the site selection.
4. Select a **date range** to report from the drop-down list.
5. Select the **employee** to report from the drop-down list.
6. Select the **Terminal** to report from the drop-down list.
7. Select the **event type** to report from the drop-down list.

To refine your search you can select **multiple/all events** (specific to the event type selection) to view the transaction data.



POS event log - Event type selection

- **System Events** — To view the transactions specific to the system events such as login, logout, terminal up and terminal down.
- **Labor events** — To view the transactions specific to the labor events such as clock in, clock out, edit shift, and more.
- **Transaction events** — To view the transactions specific to the transaction events such as open transaction, closed transaction, order items, re-open transaction, refund, split transaction and more.
- **Financial events** — To view the transactions specific to the financial events such as paid in, paid out, checkout, safe drop and delete checkout.

The transactions appear in tabular form with the following information:

Column	Description
Site	Name of the site.
Employee	Name of the employee.
Terminal	Terminal at which the event was logged.
Event time	Time of the event.
Event type	Type of event.
Details	Total details of the event requested.

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Managing Company links

The 'Company links' function allows you to provide necessary web links in one single page. This acts as a quick link to navigate to NCR Voyix specific websites or any web page without the need to first open a web browser. You can also provide access restrictions to a single user or a group of users who can view a bookmarked company link.

Edit company links

This is a list of the links to display in the main navigation under the Company Links header.

[Add new link](#)

Link text	Link URL	Viewers	Actions
NCY Voyix - A...	www.ncrvoyix.com	Administrator	
Your Pie	https://yourpie.com/	Employee	
cnn	www.cnn.com	Administrator	
push link test ...	https://pwpush.com/	Employee, Accountant/Bookkeeper	

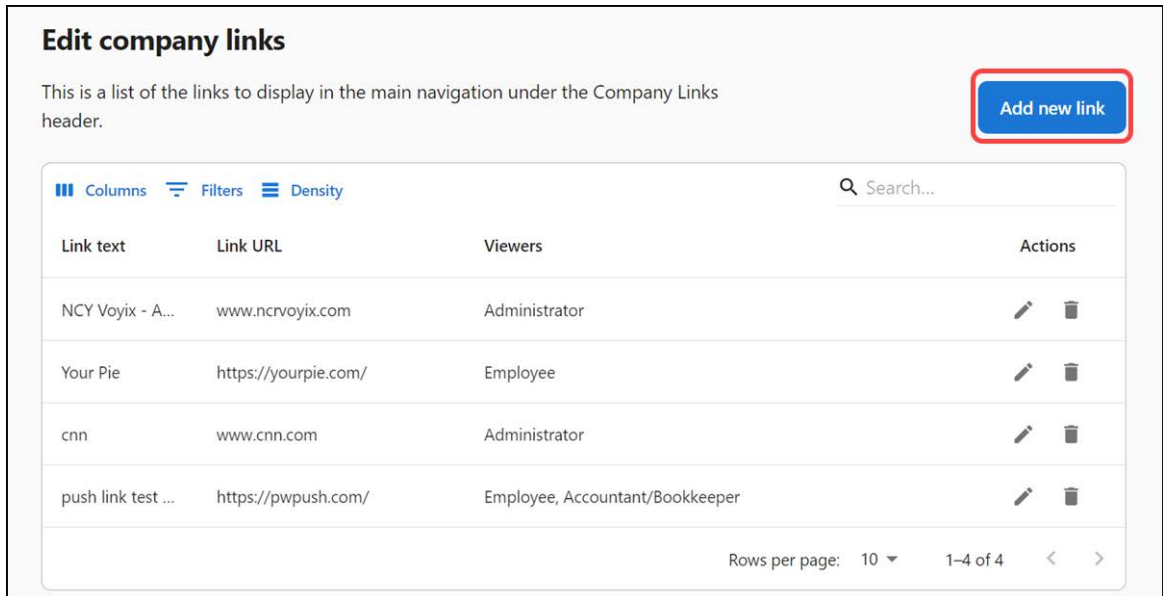
Columns Filters Density Search...

Rows per page: 10 1-4 of 4 < >

'Edit company links' screen

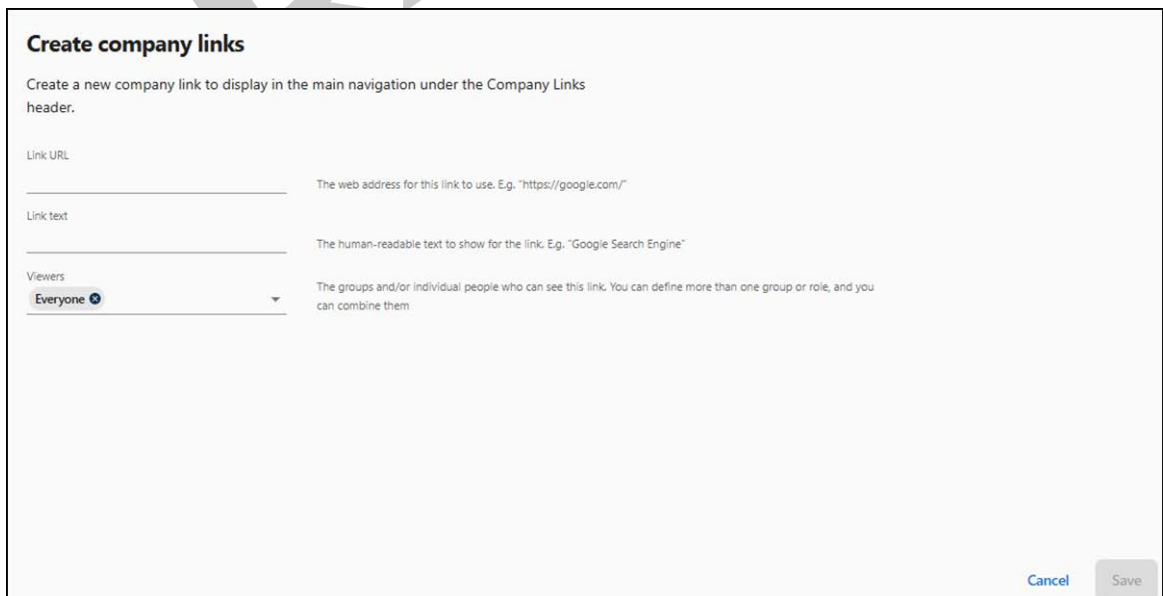
To create a company link:

1. Select **Company links** > **Edit company links**. The 'Edit company links' screen appears.



'Edit company links' screen

2. Click **Add new link**. The 'Create company links' screen appears.



'Create company links' screen

3. Enter the **Link URL** within the application for quick access. For example, if you want to provide quick access to the NCR Voyix documentation portal, type <https://docs.ncrvoyix.com/>.
4. Enter the **description** in 'Link text.' You need to provide a supporting description based on the URL entered in **Link URL**. For example, NCR Voyix Documentation Portal.
5. Select the **user group/role** or an individual from the 'Viewers' drop-down list. These users can view the corresponding bookmarked URL. The predefined user groups or roles are:
 - **Everyone** — All users can view the link. No user restrictions.
 - **Accountant/Bookkeeper** — Only accountants and bookkeepers can view the link.
 - **Administrator** — Only the users with administrator rights can view the link.
 - **Assistant Manager** — Only assistant managers can view the link.
 - **Employee** — All employees can view the link.

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- **Restaurant Manager** — Only restaurant managers can view the link.
- **NCR Support** — All members of NCR support team can view the link.

Edit company links

This is a list of the links to display in the main navigation under the Company Links header. Add new link

Columns Filters Density Search...

Link text	Link URL	Viewers	Actions
"><h1>google...	https://google.com	Everyone	
Google Search ...	https://google.com/	Administrator, Restaurant manager	
Weather	www.Weather.com	Everyone	
geeks2	https://www.geeksforgeeks.org/	Restaurant manager, Administrator	
github	https://github.com/	Administrator, Assistant Manager	
heyman	jahttpvascript:alert('https')	Everyone	
linkedin	www.linkedin.com	Everyone	
reddit	https://reddit.com	Administrator, Restaurant manager	

List of company links

6. Click **Save** to apply the changes. A new company link entry (shortcut) is listed under the 'Company links' menu. You can click the link to easily access the corresponding website.



New company link

You can **Edit** or **Delete** the company link using the icons provided in the link's row. **what?**

Viewing the Activity Log

The Activity Log function enables you to view the usage of the ASM application across your organization. The multiple filters available in this screen allow you to narrow the search to retrieve the required log records.

To view the Activity Log:

1. Select the **Activity log** menu. The Activity Log screen appears.

Activity Log

This page shows a log of application usage and activity for your organization. You can use the filters on the page to narrow down the list of results and click on an event to view more details.

051 - Flagstaff 05/16/2024 - 10/29/2024 Priority Origin User Event type Entity

Date	Time	Priority	Origin	User	Site ID	Event Type
10/1/2024	6:09 PM	Low	Sales	Petra Harris	051 - Flagstaff	Delete
10/1/2024	6:09 PM	Low	Sales	Petra Harris	051 - Flagstaff	Create
10/1/2024	6:09 PM	Low	Sales	Petra Harris	051 - Flagstaff	Update

Activity Log landing page

2. Select the values from the following **filters**, as required:

Priority — Severity of the activity, such as Low, Medium, and High.

Start and End — Period during which the activity occurred for which the log must be viewed.

Origin — Module impacted due to the activity.

User — Employee who performed the activity.

Sites — Site at which the activity occurred.

Event Type — Category of event, such as Create, Update, Delete, Login, and Logout, that occurred.

Entity — Business entity impacted.

Upon selecting the values in the filters, the data auto-populates and the following details appear in the grid view:

Date — Actual date when the event occurred in mm/dd/yyyy format.

Time — Actual time when the event occurred in HH:MM AM/PM format.

Priority — Severity of the corresponding activity.

Origin — Actual module that was impacted.

User — Name of the employee who performed the activity.

Site ID — Unique ID of the site where the activity occurred.

Event Type — Actual type of event that occurred. For example: Login, Update, Create and more.

Entity — Business entity, such as login, logout, vendor, and others impacted due the activity.

Message — Additional information about the activity.

3. Select the required **log entry**. The data listed in the grid view appears in a sliding panel along with the following additional details:

Audit logging ID — Unique audit log ID.

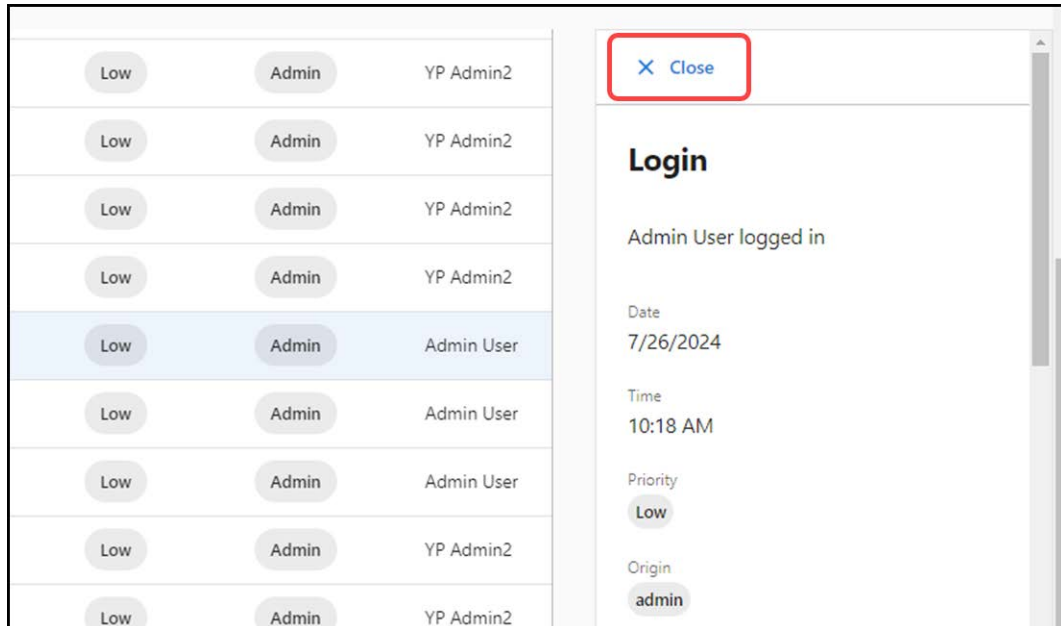
Pub Sub Message ID — Unique pub-sub message ID.

Payload — Actual payload message.

The screenshot displays the 'Activity Log' interface. On the left, there is a grid of log entries with columns for Date, Time, Priority, and Origin. The selected entry is from 10/12/2024 at 1:21 AM, with a Low priority and an 'Inventory' origin. On the right, a side panel titled 'Update' provides more details for this event, including the date (10/12/2024), time (1:21 AM), priority (Low), and origin (inventory). The main interface includes filter buttons for 'All sites', '07/11/2024 - 10/29/2024', 'Priority', and 'Origin', along with 'User', 'Event type', and 'Entity' dropdowns. A search bar and table controls (Columns, Filters, Density) are also visible above the grid.

Activity Log side panel

4. Click **Close** (available at the top in sliding panel) to exit.



Activity Log side panel - Close button

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About Settings

An organization could have many sites. Each site might operate under different time zones, follow separate payroll and fiscal calendars, and offer different menus during the day (for example: breakfast, lunch, and dinner).

The following options are available to you in the Settings function for configuring your business needs:

[Organization settings](#) — The options available under 'Organization settings' are 'Sites' and 'Fiscal calendar.'

[Site settings](#) — The options available under 'Site settings' are 'Site settings,' 'Payroll calendar,' and 'Day parts.'

[Labor settings](#) — The option available under Labor settings is Labor rules and Job configuration.'

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Working with 'Organization settings'

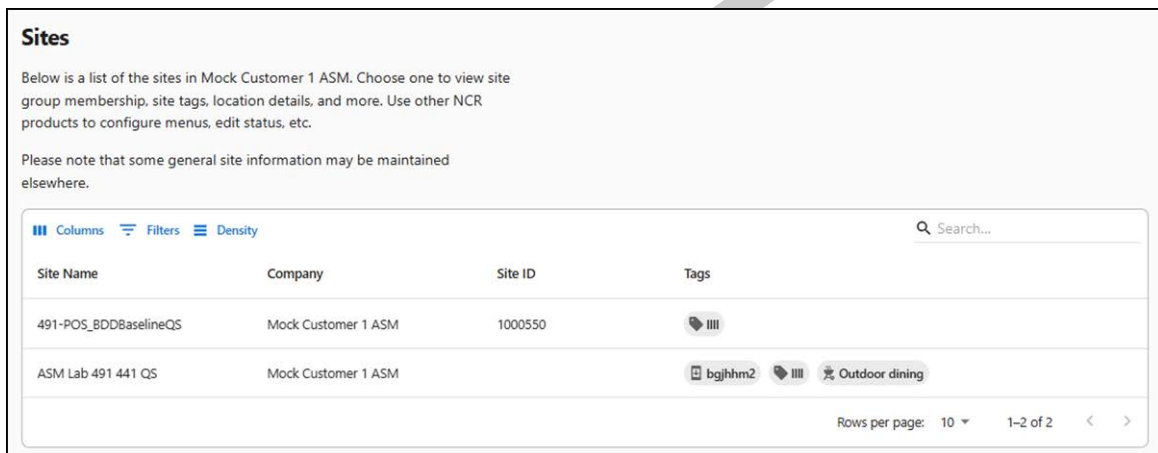
Use 'Organization settings' to view location details for sites to which you are assigned and to establish your fiscal calendar.

Viewing site information

Select a site to view site group memberships, the payroll calendar, store hours, and more. In most cases, you will not have access to all sites within an organization. Use the 'Sites' screen to view the list of sites to which you have access.

To view the sites to which you have access:

1. Select **Settings > Organization Settings > Sites**. The Sites screen appears with the list of sites assigned to you.



The screenshot shows the 'Sites' screen with a table of site information. The table has columns for Site Name, Company, Site ID, and Tags. Two sites are listed: '491-POS_BDDBaselineQS' and 'ASM Lab 491 441 QS'. The first site has a tag icon, and the second site has tags 'bgjhhm2' and 'Outdoor dining'. The screen also includes a search bar, column and filter controls, and pagination information (Rows per page: 10, 1-2 of 2).

Site Name	Company	Site ID	Tags
491-POS_BDDBaselineQS	Mock Customer 1 ASM	1000550	III
ASM Lab 491 441 QS	Mock Customer 1 ASM		bgjhhm2 III Outdoor dining

Sites screen

The following columns appear on this screen:

Site Name — The site to which you have access.

Company — The company to which the corresponding site is associated.

Site ID — The unique ID of the site.

Tags — The site tag assigned to the site.

2. Select a **site** for which to view detailed information.

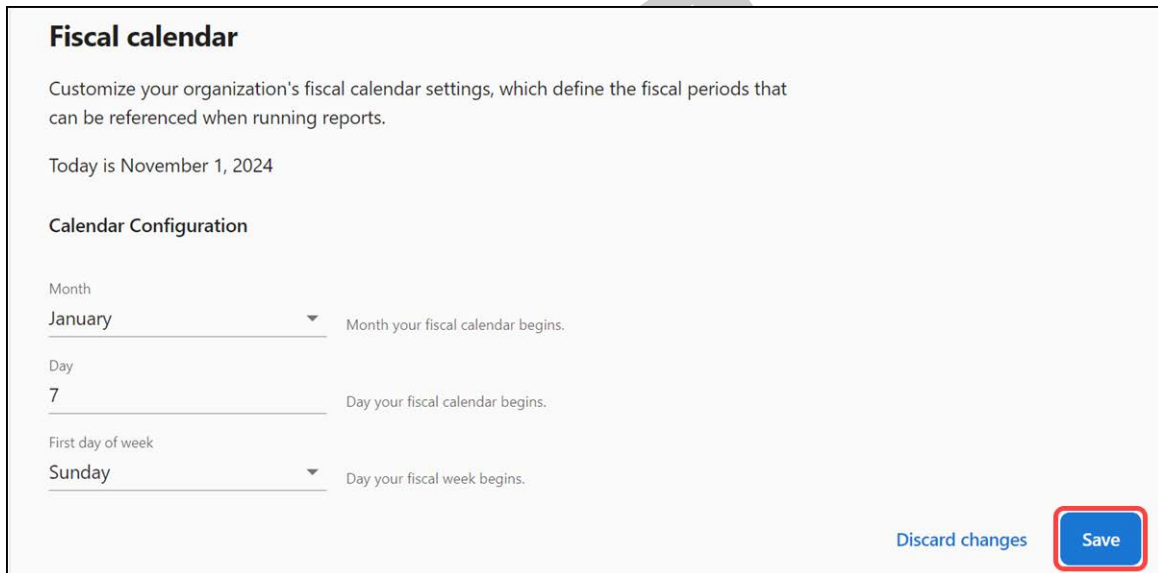
Configuring the fiscal calendar

A fiscal calendar is a 12-month accounting period that an organization uses to manage their financial reporting and accounting activities. The calendar helps you track important financial events, such as the end of a quarter or end of fiscal year, and plan for financial reporting and tax obligations. A fiscal calendar year can be different to a calendar year where January 1 is the start of the year and December 31 is the end of the year. You typically use a fiscal calendar to better manage cash flow and ensure the organization's compliance with applicable accounting standards and regulations.

You can define the fiscal calendar your organization uses and the fiscal periods when running reports.

To configure the fiscal calendar:

1. Select **Settings > Organization settings > Fiscal calendar**. The 'Fiscal calendar' screen appears.



Fiscal calendar

Customize your organization's fiscal calendar settings, which define the fiscal periods that can be referenced when running reports.

Today is November 1, 2024

Calendar Configuration

Month
January Month your fiscal calendar begins.

Day
7 Day your fiscal calendar begins.

First day of week
Sunday Day your fiscal week begins.

[Discard changes](#) [Save](#)

Fiscal calendar configuration

2. Under the 'Calendar Configuration' group bar, select the month your fiscal calendar begins.
3. Select the date your fiscal calendar year begins. If you select an incorrect date, an error message appears. For example, if you select 'April' from **Month** and '31' in **Day**, the error message, "Please enter a valid day between 1 and 30," appears.
4. Select the day of the week on which the fiscal week begins.

5. Under the 'Calendar type' group bar, select the **calendar type** to denote the type of fiscal calendar to use. The available choices are:

13-4 — Indicates a year-long calendar comprised of 13 periods of four weeks each.

12 Months — Indicates a year-long calendar of 12 periods, roughly corresponding to months.

Required Options: This option enables the 'Select quarter style' option where you define the reporting pattern for each 'month' in the quarter.

6. Select the **reporting pattern** from 'Select quarter style.' The possible patterns are:

5,4,4 — Indicates the quarter begins with a five-week month followed by two four-week months.

4,5,4 — Indicates the quarter begins with a four-week month followed by a five-week month and a four-week month.

4,4,5 — Indicates the quarter begins with two four-week months and ends with a five-week month.

Under the 'Preview' group bar, based on the selected fiscal calendar type and quarter style, the calendar format appears.

Calendar type

Select calendar type
12 Months Specify your calendar type. (Example: 13-4, 12 months)

Select quarter style
4-4-5 Specify your quarter style. (Example: 4-4-5, 4-5-4, 5-4-4)

Preview

< 2024 > (52 Weeks)

Quarter	Fiscal Period	Fiscal Week	W	Th	F	Sa	Su	M	Tu
1	1	1	3	4	5	6	7	8	9

Discard changes

Fiscal calendar type

7. Click **Save**.

Working with 'Site settings'

The 'Site settings' function allows you to view the site-specific settings for the currently selected site. You can also select the start date and frequency for your payroll calendar, and manage your days parts.

Viewing Site Settings

Select Settings > Site settings > Site Settings to view the site-specific settings for the site selected when you logged in or from the site picker. The 'Site Settings' screen appears with the following details.

The screenshot shows the 'Site Settings' interface. At the top, it says 'Site Settings' and 'Displaying general information for the selected site.' Below this, the site is identified as '051 - Flagstaff', last updated on 5/10/2019 at 5:04 AM. The settings are organized into sections: 'Site name' (051 - Flagstaff), 'Site ID' (561213), 'Address' (2619 S Woodlands Village Blvd, Suite 650, Flagstaff, AZ, 86002), 'Company Name' (silver-merchant-547445), 'Site tags' (Delivery, Free wifi, Heated Patio), 'Belongs to Store Groups' (Hyderabad (Custom), Labor Rules - Arizona, Flagstaff (Custom), Labor Rules - Connecticut (Custom), Labor Rules -Texas (Custom)), and 'Primary Contact' (empty field).

'Site Settings' screen

The 'Site Settings' screen is view-only and provides general information about the selected site. Additionally, the site name and date and time when the site details were recently updated appear.

Field name	Description
Site name	Unique name of the site. This name is used to represent your site at all occurrences.
Site ID	Unique ID of the site. This ID is used to represent your site at all occurrences.
Address	Full address of the selected site.
Company Name	Name of the company with which the selected site is associated.
Site tags	Site tags associated with the site.
Belong to Store Groups	Name of the site groups to which the selected site is associated.
Primary Contact	Name of the employee who is the primary point of contact at site in case of an emergency.
Status	Status of the site: Active or Inactive.
Payroll Calendar	Payroll calendar used for the selected site.
Time Zone	Time zone to which the selected site is mapped.

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Configuring the payroll calendar for a site

Select Settings > Site settings > Payroll calendar to establish the start date and frequency for your payroll calendar and preview the results. A payroll calendar is a schedule that outlines the pay periods and pay dates to ensure employees are paid accurately and on time. You can set up the payroll calendar for weekly or bi-weekly. By using a payroll calendar, the organization can ensure compliance with applicable rules and regulations.

To configure the payroll calendar:

1. Select **Settings > Site settings > Payroll calendar**. The Payroll Calendar screen appears.
2. Select the **start date** of your first payroll period.
3. Select the **frequency** to determine how often to process the payroll. The available options are:

Every other week — Used for bi-weekly payrolls.


Every week — Used for weekly payrolls.


Payroll Calendar

Define your payroll calendar by specifying a start date and frequency

Today is January 31, 2025

Calendar configuration

Start date *
01/06/2023  Select the start date of your first payroll period

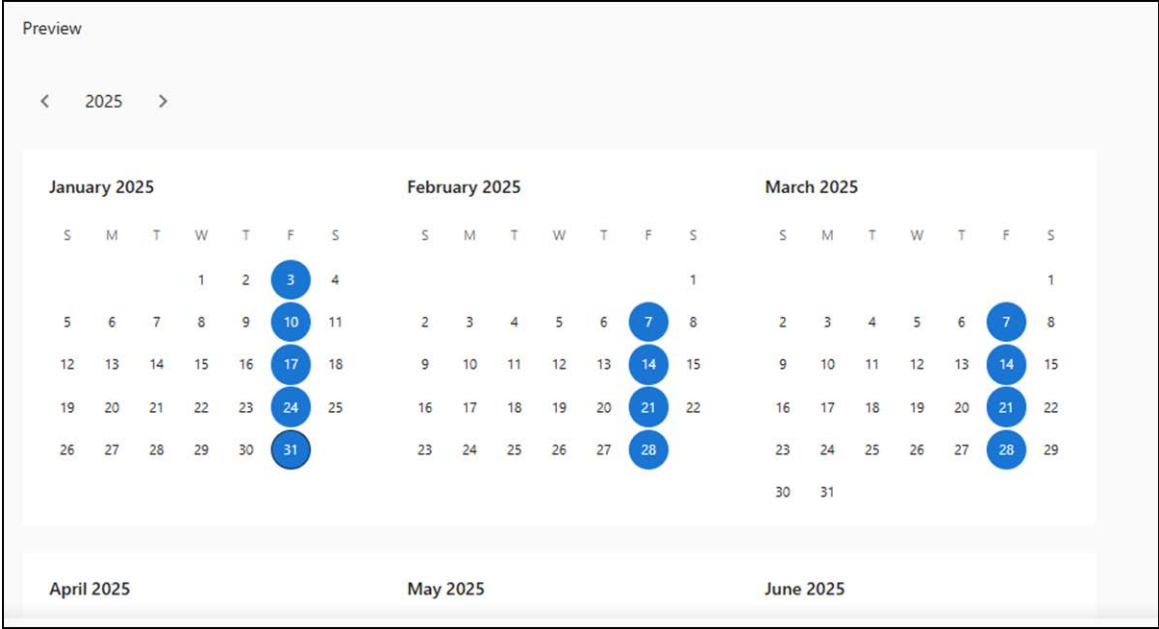
Frequency
Every week  Choose your payroll period frequency

Preview

< 2025 >

Payroll calendar options

In the Preview section, the first day of each payroll week is highlighted. This helps you easily view the payment dates and plan accordingly.



Payroll calendar preview

4. Click **Save**.

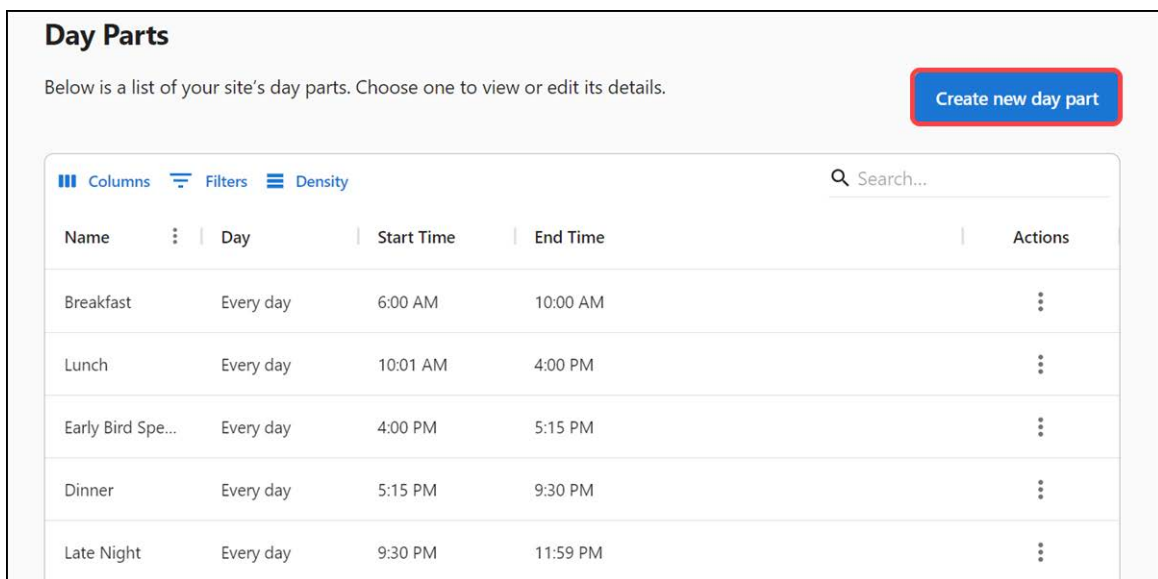
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Configuring a day part

Select Settings > Site settings > Day parts to manage your days parts, including adding, editing, and deleting a day part. Day parts are defined to divide a day into parts, such as breakfast, lunch, dinner, happy hour, and others. They allow you to organize business data for reporting purposes and coincide with other Aloha features that rely on day parts, such as event scheduling, surveys, and tip sharing. The event scheduler triggers period changes using the start time and the subsequent period start time serves as an end time for the previous period.

To configure a day part:

1. Select **Settings > Site settings > Day parts**. The Day Parts screen appears.



Creating a day part

2. Click **Create new day part**. The Creating New Day Part screen appears from the right side of the screen.
3. Type a **name** to identify the part of a day, such as breakfast.
4. Type any **additional information** about the day part in 'Description,' such as 'Breakfast timings.'
5. Select the **days** for which the day part is active. For example, if you want to configure a day part for happy hour, between 2 p.m. and 6 p.m. on Wednesdays, select 'Wednesday' from the 'Days' drop-down list.
6. Select the **start time** of the day part.

7. Select the **end time** of the day part.

Close More Edit

Creating New Day Part

Name
Happy hours

Description
Discounted price

Day
Wednesdays

Start time
01:00 PM

End time
04:00 PM

Cancel Save

Day part

8. Click **Save** or click **Cancel** to cancel the procedure.

To edit a day part:

1. Select **Settings > Site settings > Day parts**. The Day Parts screen appears.
2. Click the **three dots** menu under Actions for the day part to edit, and select **Edit** from the menu that appears. The drawer for the selected day part appears on the right side of the screen.
3. Modify the **day part**, as needed.
4. Click **Save**.

To delete a day part:

1. Select **Settings > Site settings > Day parts**. The Day Parts screen appears.
2. Click the **three dots menu** for the day part to delete and select **Delete** from the menu that appears. A warning message appears.
3. Click **Delete** to confirm the deletion.

Working with Labor settings

Use 'Labor settings' to configure jobs. Job data is required when hiring, maintaining pay rates, scheduling, and reporting. Use Jobs to schedule employees to work certain jobs and to pay those employees correctly.

Configuring Jobs

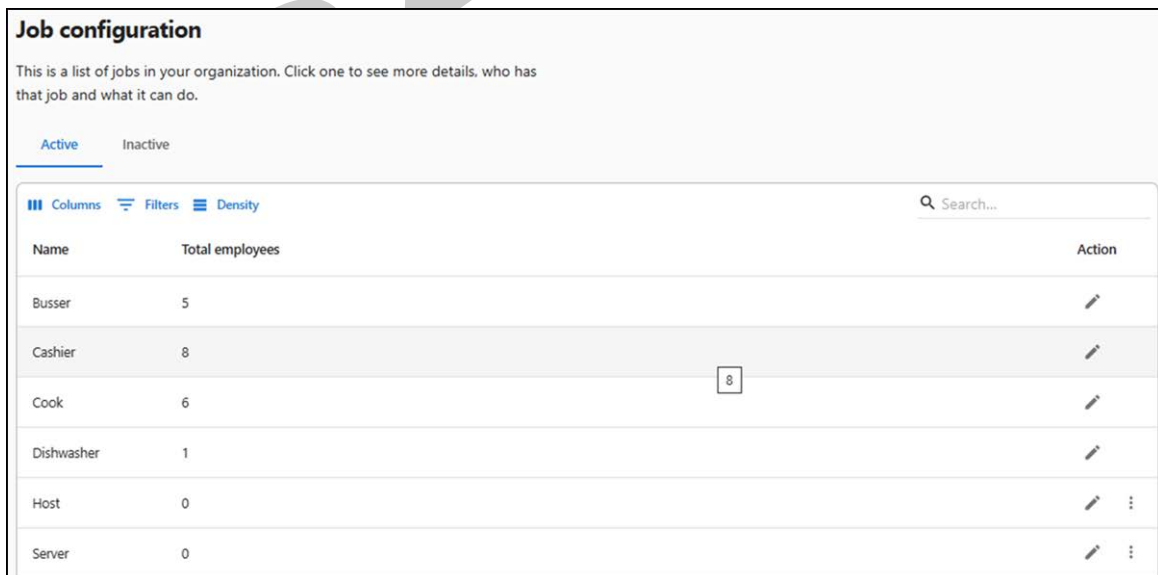
The 'Jobs' function provides a job description for the role an employee performs when they are clocked in. Jobs control whether an employee can enter orders, the parameters under which they can take breaks, whether they can operate a cash drawer, and more.

In Aloha Smart Manager, there are 14 seeded jobs available by default; however, administrators can modify job properties, such as:

- Changing a job name.
- Selecting the labor group under which the job reports.
- Configuring the POS ID and access level.
- Activating or deactivating a job.

To modify job properties:

1. Select **Settings > Labor settings > Job configuration**. The 'Job configuration' screen appears.



Job configuration

This is a list of jobs in your organization. Click one to see more details, who has that job and what it can do.

Active Inactive

Columns Filters Density Search...

Name	Total employees	Action
Busser	5	
Cashier	8	
Cook	6	
Dishwasher	1	
Host	0	
Server	0	

'Job configuration' screen

2. Click the **pencil** next to the job to modify. The 'Job details' tab appears as the active tab.

The screenshot displays the 'Job details' configuration page for a job named 'Busser'. The page is titled 'JOB CONFIGURATION / BUSSEER'. On the left, there is a sidebar with 'Job details' and 'Employees' tabs. The main content area is titled 'Job details' and contains the following fields and options:

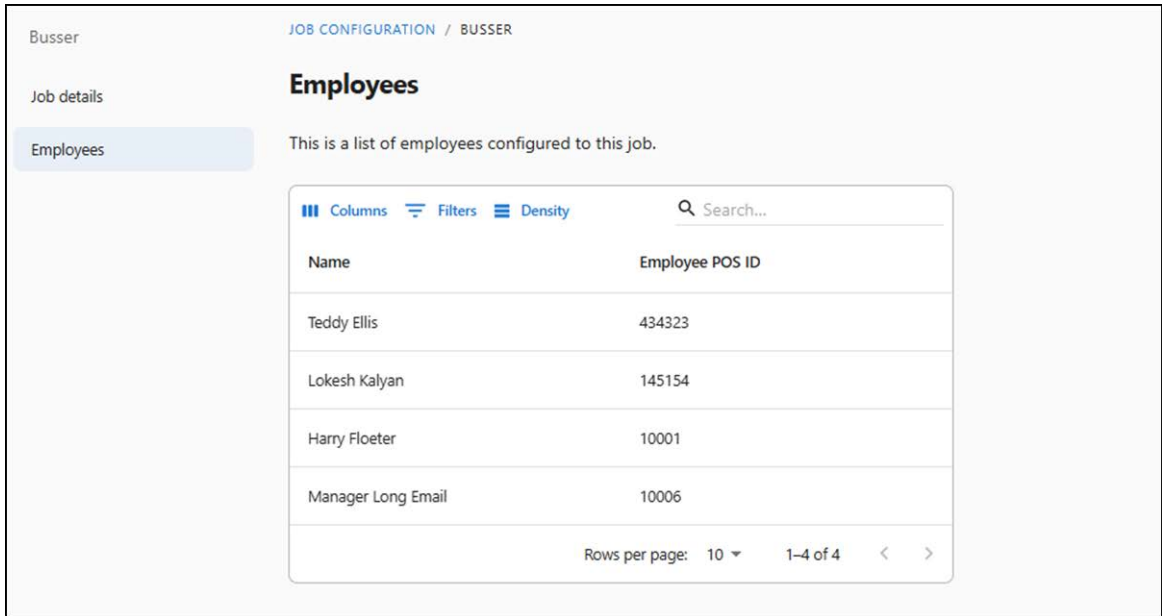
- Identification**
 - Show job on the POS system (with an information icon)
 - Name*: Busser (The job used on the POS system.)
 - Exclude hours and dollars from payroll
 - Exclude hours and dollars from schedule metrics
 - Labor group: Back of House (dropdown menu)
 - GL code (Read only) (For more information about GL codes, refer to the Uniform System of Accounts for Restaurants.)

At the bottom right, there are 'Close' and 'Save' buttons.

'Job details' screen

3. Select **Show job on the POS system** to make the job available for selection when logging in to the Front-of-House. The 'Show job on the POS system' option is available for selection only when no employees are assigned to the selected job. Toggle this option to the off position to hide it from selection when logging in to the POS.
4. Type a descriptive **name** to appear in the FOH to assist the employee in job selection.
5. Select **Exclude hours and dollars from payroll** to exclude the hours and dollar amounts worked and earned under the selected job code from the payroll report. for any employees specified employee
6. Select **Exclude hours and dollars from schedule metrics** to hide/exclude labor hours and dollars from the schedule metrics. This allows you to include only time and dollars you want to report for direct labor expense in your schedule.
7. Select a **labor group** to which to assign the job. Your choices are Front of House, Back of House, Management, and Maintenance.
8. Disregard **GL code** as this is currently not supported.
9. Click **Save**.

10. Select the **Employees** tab to view a list of employees currently assigned to the job.



Busser

JOB CONFIGURATION / BUSSER

Job details

Employees

This is a list of employees configured to this job.

Name	Employee POS ID
Teddy Ellis	434323
Lokesh Kalyan	145154
Harry Floeter	10001
Manager Long Email	10006

Columns Filters Density Search...

Rows per page: 10 1-4 of 4 < >

Employee jobs



Tip

When you select an employee in the list, ASM navigates you to the Employees function, allowing you to assign additional jobs to the employee. Refer to "[Assigning a job to an employee](#)" on [page 48](#) for more information.

Making a job inactive

An administrator can make a job that is no longer in use inactive using two methods. Once inactive, the job no longer appears in the POS system.

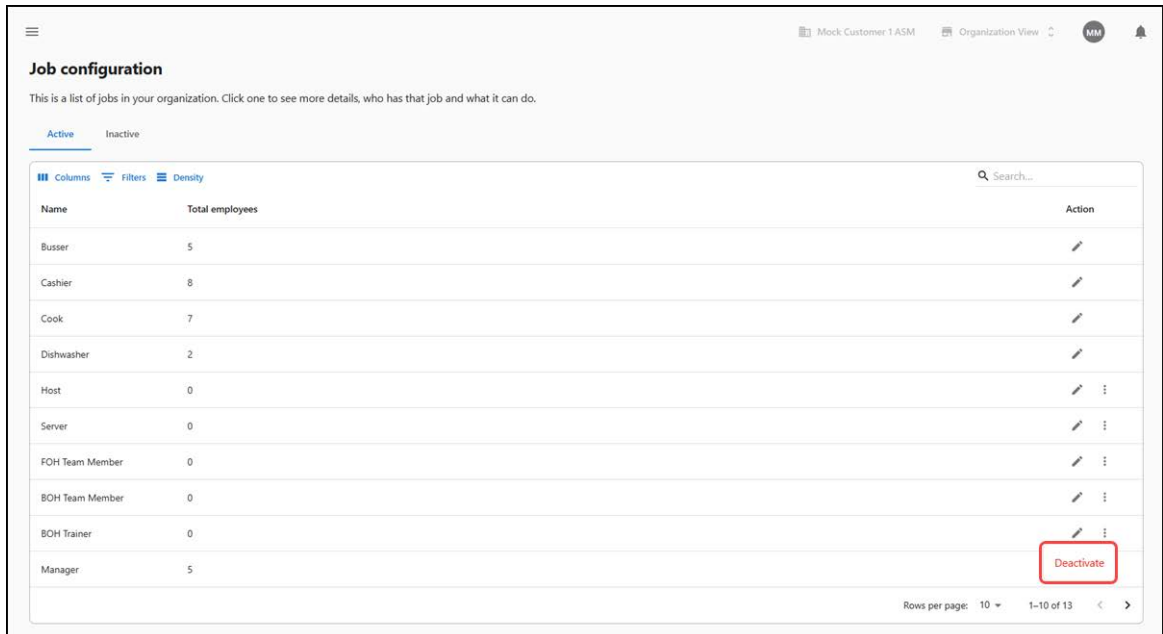


Warning

Ensure no employees are assigned to the job before making it inactive.

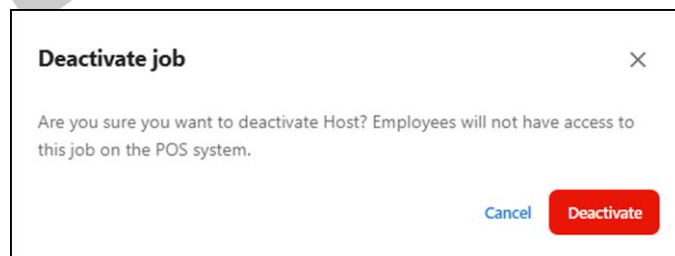
To deactivate a job:

1. Select **Settings > Labor Settings > Job configuration**. The 'Job configuration' screen appears.



Deactivate a job

2. Click the **three dots menu** under Actions and select **Deactivate** from the menu that appears. A confirmation message appears.



Confirm job deactivation

3. Click **Deactivate** to confirm the deactivation.

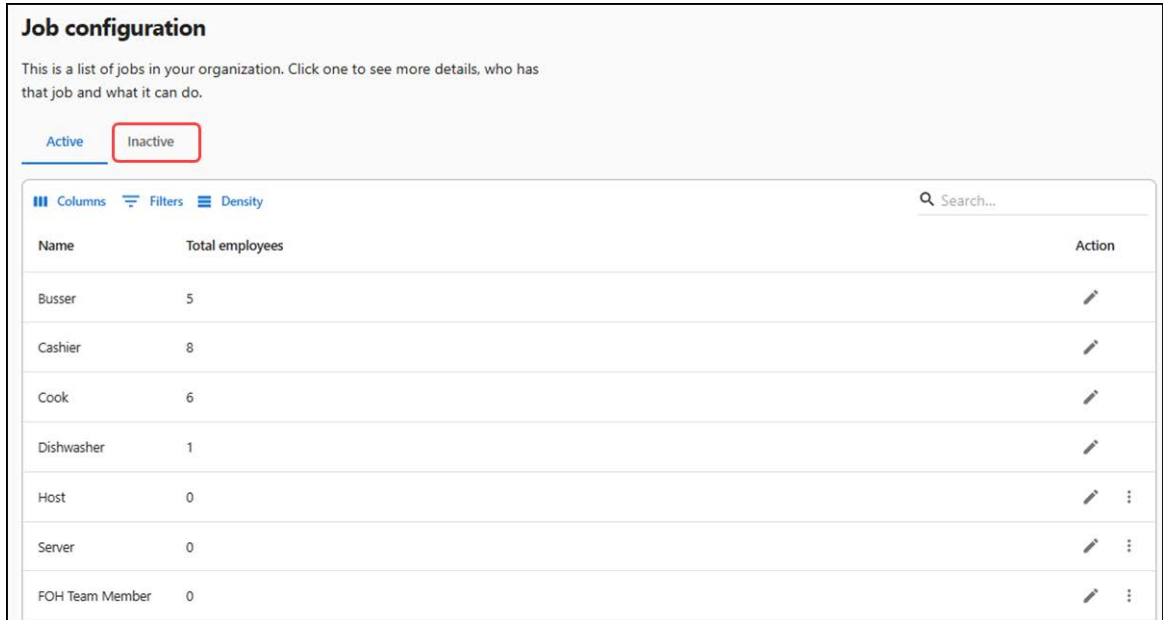


Tip

Select the Inactive tab to view a list of jobs that are deactivated or hidden.

To activate a job currently set as inactive:

1. Select **Settings > Labor Settings > Job configuration..**



Inactive job

2. Select the **Inactive** tab to view the jobs currently set as inactive.



Activate a job

3. Click the **three dots menu** under Action and select **Activate** from the menu that appears. The job is now **active** and available to assign to employees.

Appendix A: Bulk importing vendors and vendor items

When working with vendors and vendor items, you have the option to upload vendors and vendor items into organizations within Aloha Smart Manager using a .CSV file. This helps high-end corporations, franchisees, and restaurants who use an extensive number of vendors to easily manage the transfer of these items to ASM without having to perform the tedious task of entering each vendor and vendor item individually. To take advantage of this time-saving feature, you must enter your vendors into a spreadsheet. Be aware that Aloha Smart Manager requires specific rules and provides a downloadable template file for a successful upload. You must manually enter any fields that do not download successfully, or retry the upload.

Uploading vendors in bulk

Upload vendors in bulk using the 15 columns in the vendors_data_import.CSV file, adhering to the following rules:

- Do not alter the width of any column or you may receive unwanted changes. Always keep the width at approximately 8.43 units, which is the Microsoft® Excel® default.
- The total file size of the spreadsheet must not exceed 1 MB.

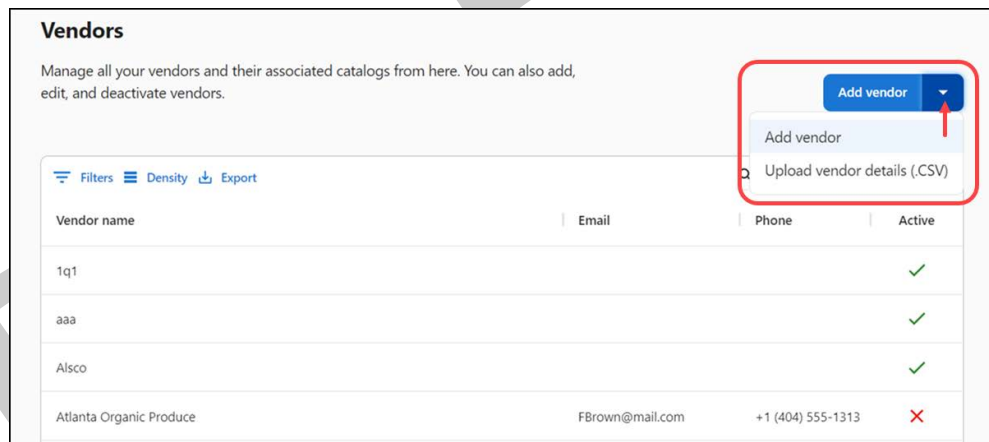
You will need the country.CSV, countrycode.CSV, and state.CSV as a reference for entering the data into vendors_data_import.CSV.

Column	Column name	Description
Column A	Vendor name	The name of the vendor, up to 100 characters. This is a required field and it must be unique.
Column B	A/P Code	The accounts payable code, up to 50 characters.
Column C	Country	The country of the vendor as either the full name or abbreviation. Click 'Download country options list' for the list of countries defined in Aloha Smart Manager.
Column D	Address 1	The address of the vendor, up to 250 characters.
Column E	Address/Suite	The address/suite of the vendor, up to 250 characters.
Column F	City	The city where the vendor resides, up to 100 characters.
Column G	State	The state or province where the vendor resides, either the full name or abbreviation. Click 'Download states/regions options list' for the list of states and regions defined in Aloha Smart Manager.
Column H	Postal Code	The postal code of the vendor, up to 10 characters.
Column I	Contact Name	The contact name associated with the vendor, up to 100 characters.
Column J	Contact Title	The title of the contact associated with the vendor, up to 50 characters.

Column	Column name	Description
Column K	Country Code	The country code for the vendor, either the full name or abbreviation. Click 'Download country code list' for the list of country codes defined in Aloha Smart Manager.
Column L	Phone	The phone number associated with the vendor. The number must be prefixed with the numbers in accordance with the corresponding country code. Refer to column C in the 'Country' spreadsheet downloaded for the 'Country Code' option.
Column M	Email Address	The email address of the vendor, up to 100 characters.
Column N	Customer Account Number	The customer account number associated with the vendor, up to 250 characters.
Column O	Comments	Any comments related to the vendor, up to 1000 characters.

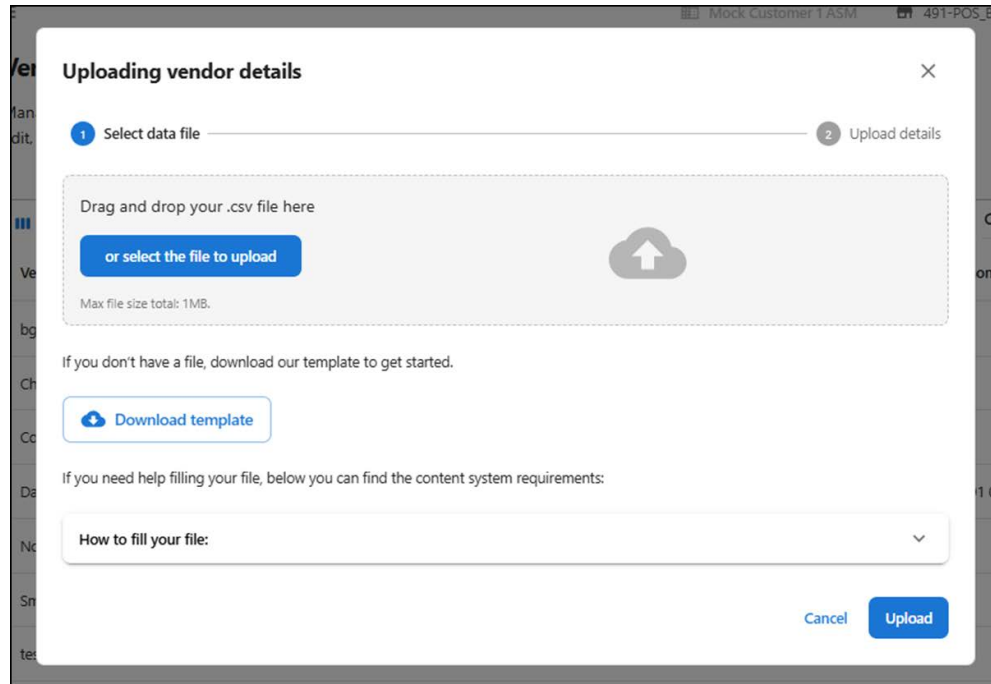
To upload vendors in bulk:

1. Select **Inventory > Vendors**. The 'Vendors' screen appears.



Add vendors in bulk

- Click the **Add vendor** drop-down arrow and select **Upload vendor details (.CSV)**. The 'Uploading vendor details' screen appears.



'Uploading vendor details' screen

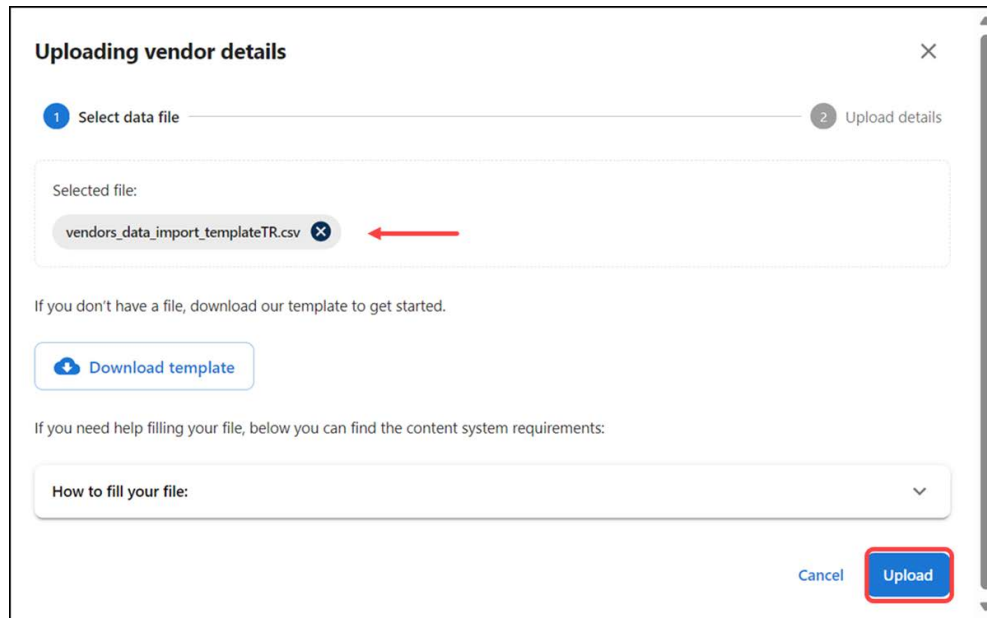
- Click **Download template**. The file automatically downloads vendor_data_import.CSV.
- Click the **How to fill your file** drop-down to expose instructions for completing the spreadsheet.
- Type or copy and paste the **vendor information** into vendor_data_import.CSV..

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Vendor Name	V/P Code	Country	Address 1	Address/SCity	State	Postal cod	Contact n:	Contact tit	Country c:	Phone nu:	Email add:	Customer	Comments		
2	Mark	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@testf	123456	This is comments	
3	John	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@testf	123456	This is comments	
4	Francis	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@testf	123456	This is comments	
5																

Adding vendor information in bulk

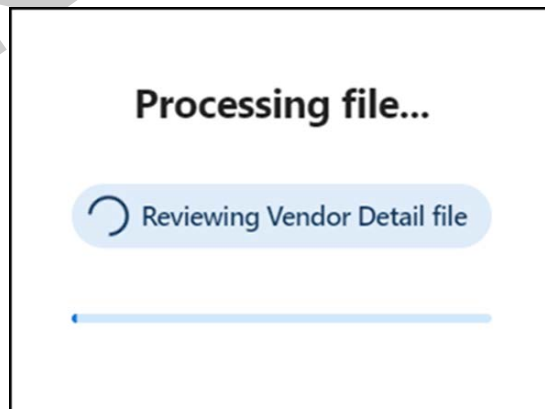
- Return to the **Uploading vendor details** screen and upload the **.CSV file** by performing **one** of the following:
 - Drag and drop **vendor_data_import.CSV** into the appropriate area.
 - OR-

- b. Click **or select the file to upload** to browse to and select **vendor_data_import.CSV** and click **Open**.



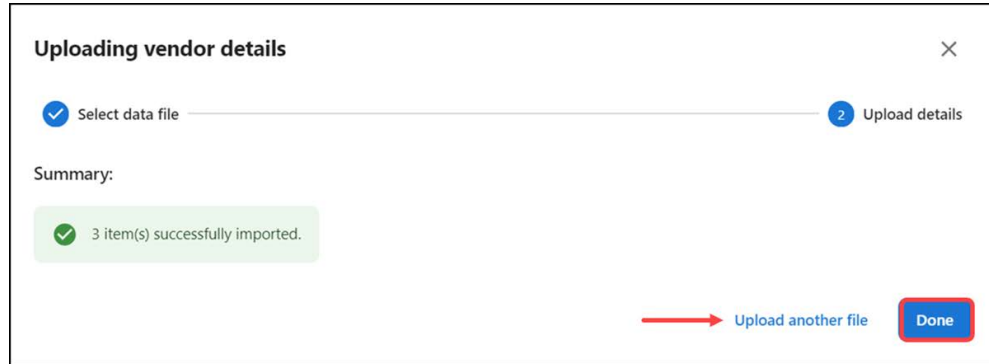
Selecting vendors file list

7. Click **Upload** to upload the file into ASM. A 'Processing file' status screen appears as ASM validates the file.



'Processing file' status screen

Once uploaded, the vendors appear in a grid format under the 'Selected file' tab. The summary appears in the 'Uploading vendor details' screen. Inspect any data that was not uploaded successfully



'Uploading vendor details' screen with summary

8. Click **Upload another file** to upload another file with bulk vendor details.
-OR-
9. Click **Done** to return to the 'Vendors' screen.

Uploading vendor items in bulk

Upload vendor items in bulk using the 11 columns in the vendors_item_import_template.CSV file, using the following rules:

- Do not alter the width of any column or you may receive unwanted changes. Always keep the width at approximately 8.43 units, which is the MS Excel default.
- The total file size of the spreadsheet must not exceed 1 MB.

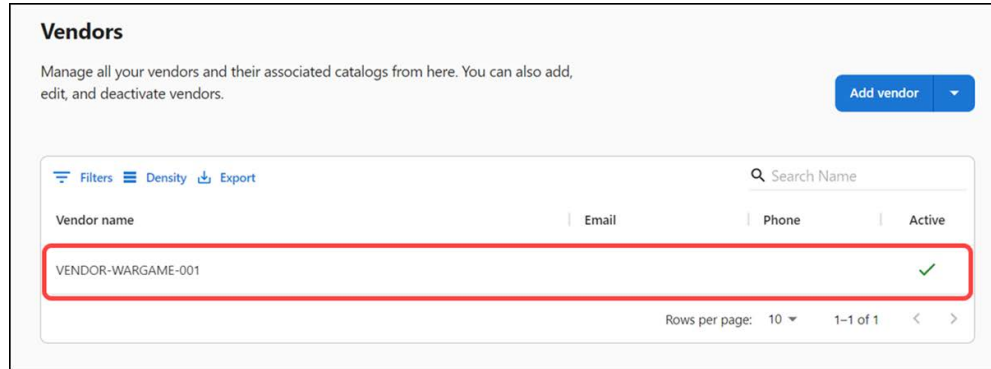
You will need the container.CSV, purchaseunit.CSV, and category.CSV as a reference for entering the data into vendors_item_import_template.CSV.

Column	Column name	Description
Column A:	Item code	The vendor item identifying number, up to 50 characters. You can leave this blank as long as name/description, container, pack, size, and unit combination are unique.
Column B	Name/Description	The description of the vendor item, up to 250 characters. This is a required field.
Column C	Container	The bulk packaging type used by the vendor. Click 'Download container options list' for the list of containers defined in Aloha Smart Manager. This is a required field.

Column	Column name	Description
Column D	Pack	The number of packs within the vendor item container. This field must be a numeric value from 1-999 and can include decimals with up to two decimal points. This is a required field.
Column E	Size	The amount or size of every unit inside each pack, such as 16 pounds. This field must be a numeric value from 1-999 and can include decimals with up to two decimal points. This is a required field.
Column F	Purchase unit	The industry standard measurement of product inside a pack, such as 16 pounds. Click 'Download unit options list' for the list of purchase units defined in Aloha Smart Manager. This is a required field.
Column G	Catch weight	The catch weight indicates if an item may vary in weight when it is received. This field must be entered as True or False where True indicates the item has a catch weight and False indicates the item does not have a catch weight. This is a required field.
Column H	Receive unit	Where 'Catch weight' is True, enter the industry standard measurement of the received product. Where 'Catch weight' is False, the receive unit should be the same as the 'Purchase unit.' This is a required field.
Column I	Price	The price of the vendor item container. This field must be a numeric value and can include decimals with up to two decimal points. This is a required field.
Column J	Raw item	The name of the raw item associated with the vendor item, up to 250 characters.
Column K	Category	The category ID associated with the raw item. Click 'Download category options list' for the list of categories defined in Aloha Smart Manager.

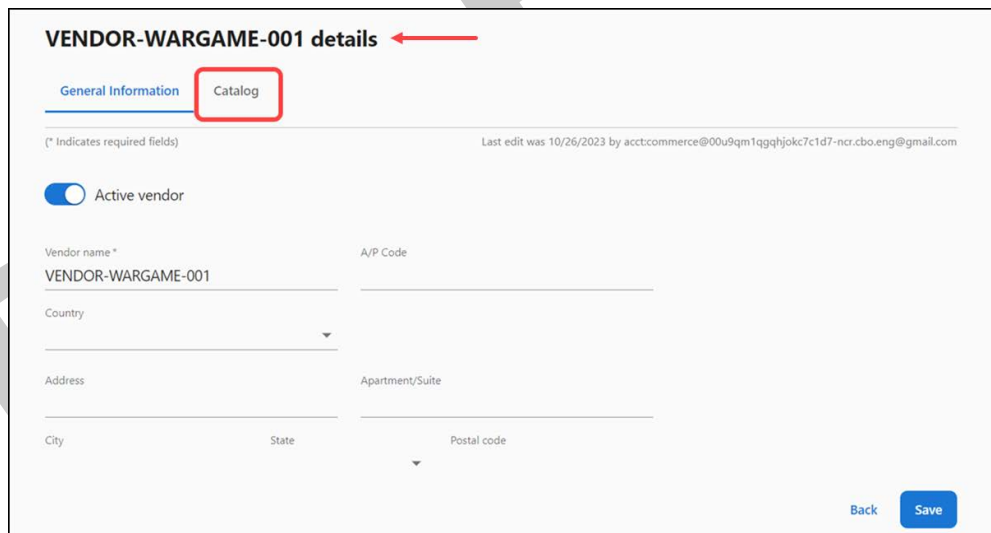
To upload vendor items in bulk:

1. Select **Inventory > Vendors**. The available vendors appear in the 'Vendors' screen.



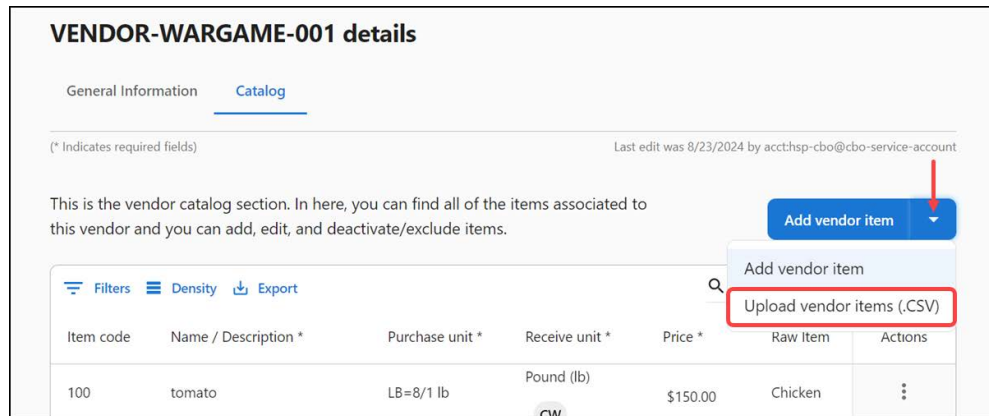
'Vendors' screen

2. Select the **vendor** for which to upload vendor items in bulk. The vendor details appear with the 'General information' tab as the active tab.



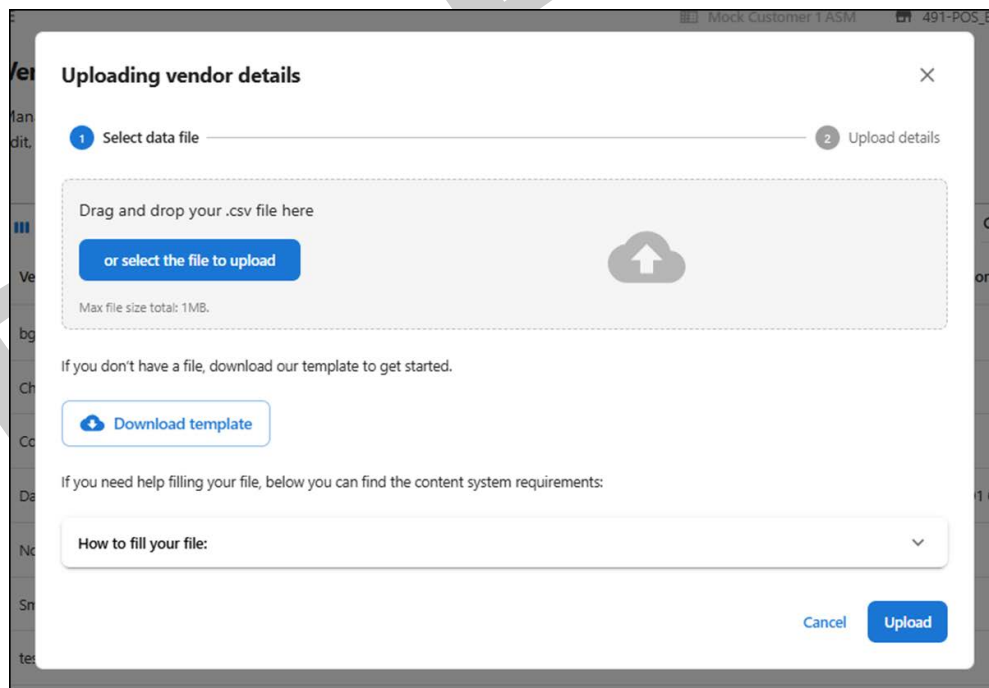
'General information' tab

3. Select the **Catalog** tab.



'Catalog' tab

4. Click the 'Add vendor item' drop-down arrow and select **Upload vendor items (.CSV)**. The 'Uploading vendor details' screen appears.



'Uploading vendor details' screen when using .CSV file

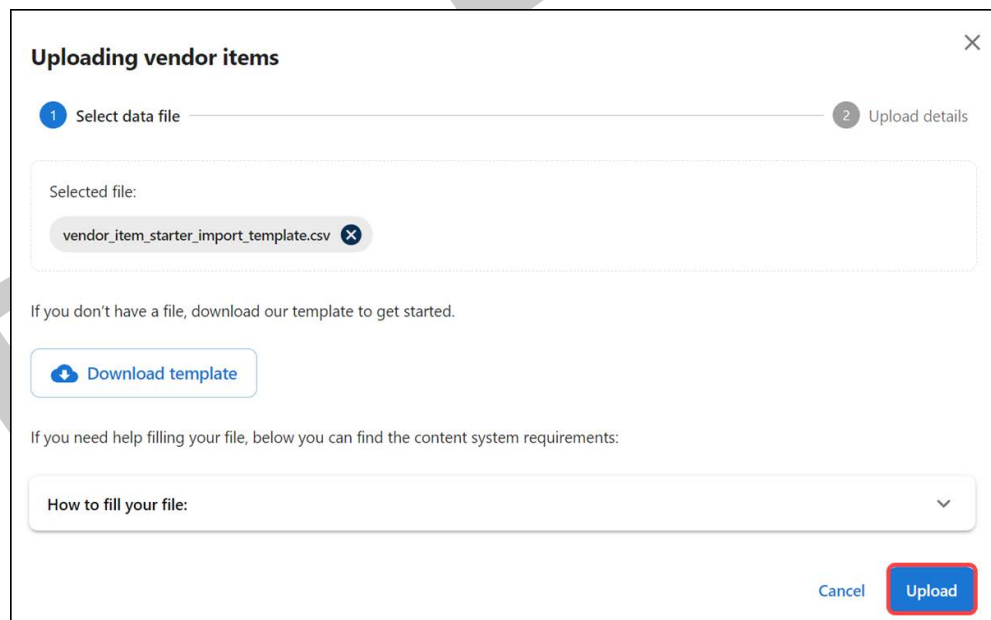
5. Click **Download template**. The file automatically downloads vendor_item_import_template.CSV.
6. Click the **How to fill your file** drop-down to expose instructions for completing the spreadsheet.

7. Type or copy and paste the **vendor item information** into vendor_item_import_template.CSV.

A	B	C	D	E	F	G	H	I
Item Code	Name/Description	Container	Packs	Size	Unit (Name or abbreviation)	Price	Raw item	Category ID
200	tomato	Pound	8	1 lb		20	Chicken	5190
201	potato	Case	3	1 lb		30	Chicken	5190
202	chicken	Pound	2	2 lb		100	Chicken	5190

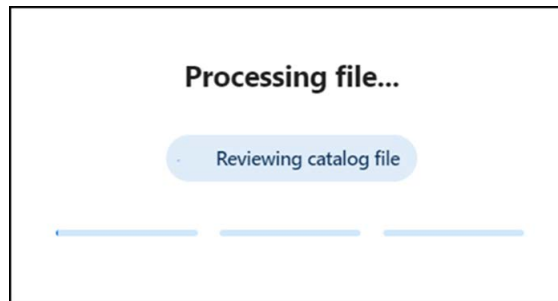
Bulk vendor items details in .CSV file

8. Perform **one** of the following actions to upload the .CSV file:
 - a. Drag and drop the **file** containing the vendor item details.
 - OR-
 - b. Click **or select file to upload**, browse to and select the **file** to upload, and click **Open** to upload the complete the upload.
9. Click **Upload** to upload the file into ASM. A 'Processing file' status screen appears as ASM validates the file.



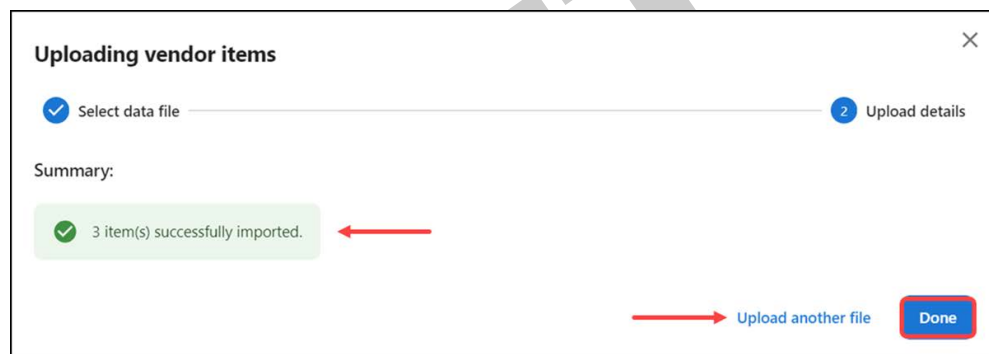
Selecting vendors items file list

The 'Processing file' status screen appears.



'Processing file' status screen

Once uploaded, the vendors appear in a grid format under the 'Selected file' tab. The summary appears in the 'Uploading vendor items' screen. Inspect any data that was not uploaded successfully



Bulk upload summary

10. Click **Upload another file** to upload another file with bulk vendor item details, or click **Done** to return to the vendor details > 'Catalog' tab.

Once uploaded, the details appear in a grid format on the **Catalog** tab. The vendor details show the added vendor items.

Atlanta Organic Produce details

General Information **Catalog**

(* Indicates required fields) Last edit was 11/7/2024 by acct:commerce@00u7dczymxkqujvw697-ncr.cbo.eng.qe.adm+admin@gmail.com

⚠ You have 3 unmapped item(s). Make sure to map all your vendor items to a raw item and a category to get accurate reports.

This is the vendor catalog section. In here, you can find all of the items associated to this vendor and you can add, edit, and deactivate/exclude items. [Add vendor item](#)

Filters Density Search Name

Item code	Name / Description *	Purchase unit *	Receive unit *	Price *	Raw Item	Actions
201	potato	CS=3/1 lb	Pound (lb)	30.00	Chicken	⋮
200	tomato	LB=8/1 lb	Pound (lb)	20.00	Chicken	⋮
202	chicken	LB=2/2 lb	Pound (lb)	100.00	Chicken	⋮
1000	Lettuce - Romaine	CS=4/3 ea	Each (ea)	25.00	Steak, Skirt	⋮
1001	Tomato - Roma	LB=1 lb	Pound (lb)	10.00	Prod Test V1.	⋮

Vendor items successful upload

DRY

Appendix B: Uploading an invoice

ASM is built with OCR (Optical Character Recognition) functionality that reads the uploaded invoices and feeds data into the system. This technology greatly reduces the time and effort of creating an invoice while retaining the integrity of the printed invoice.

A manager can upload and process an invoice from their desktop or mobile, either as a digital image file or a PDF file. ASM detects the individual elements of the uploaded invoice to process and read the uploaded image. A manager can also make changes to the resulting invoice values. When the system reads the invoice data, the invoice is ready for processing and reporting.



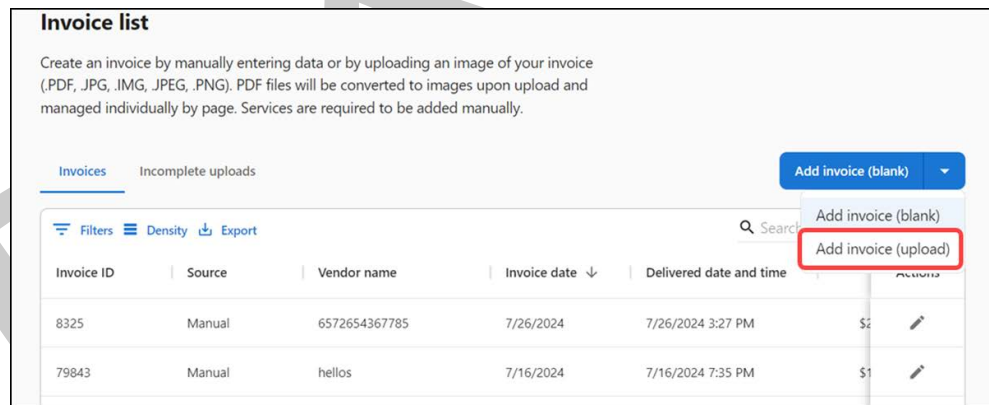
Tip

You can upload only one image at a time. If the invoice is in PDF format, convert the PDF into an image format and upload. You can use JPG, JPEG, IMG, and PNG.

Uploading the invoice details

To upload the invoice details:

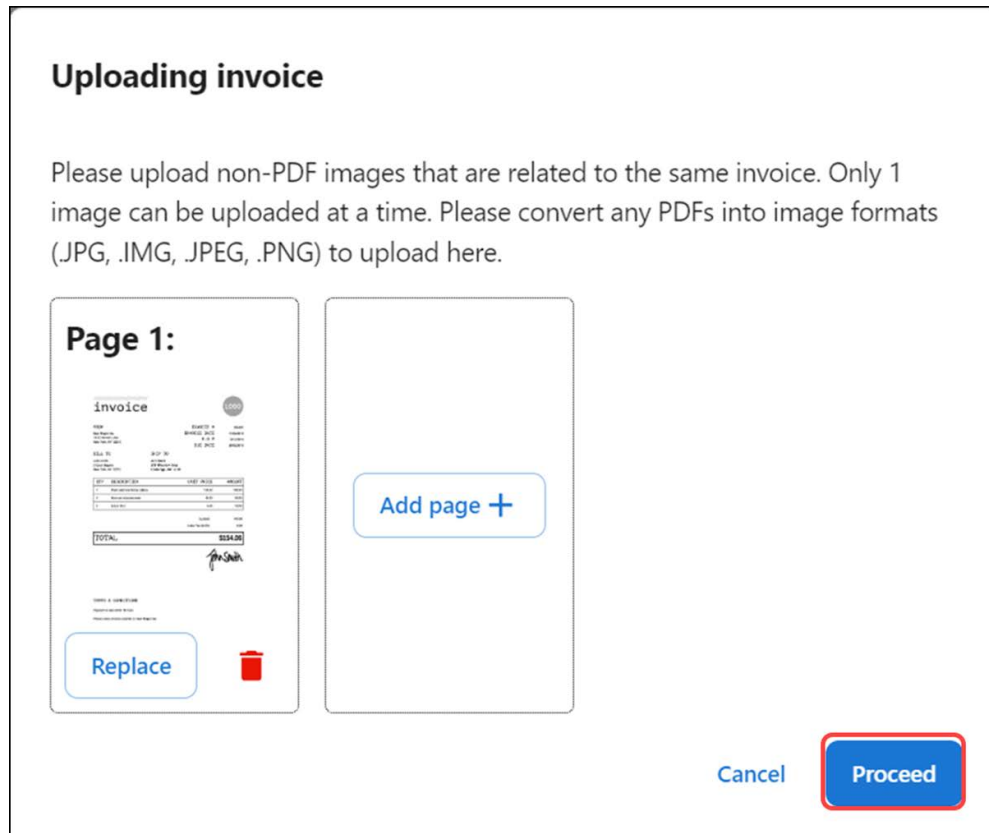
1. Select **Inventory > Invoices**. The 'Invoice list' screen appears.



'Invoice list' screen

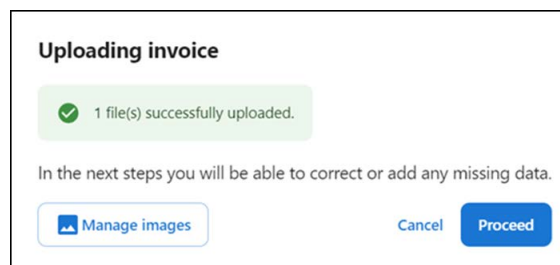
2. Select **Add invoice (upload)** from the 'Add invoice (blank)' drop-down list.

3. Browse to and select the **invoice** to upload. The 'Uploading invoice' screen appears.



'Uploading invoice' screen

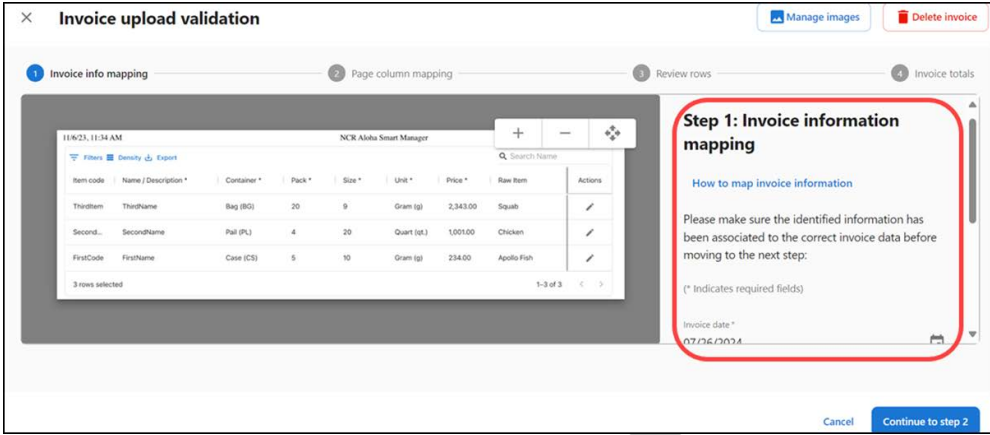
4. (Optional) Click **Add page +** to upload multiple images related to the same invoice.
5. Click **Proceed**. The 'Processing files' status screen appears. If your upload file meets the requirements, the 'Uploading invoice' success message appears.



'Uploading invoice' success message

6. You can use the **Manage images** option to upload the images again.

- 7. Click **Proceed** to continue with the mapping process. The 'Invoice upload validation' screen appears.



'Invoice upload validation' screen

- 8. Continue to [Mapping invoice information](#) to begin the process of validating the uploaded invoice.

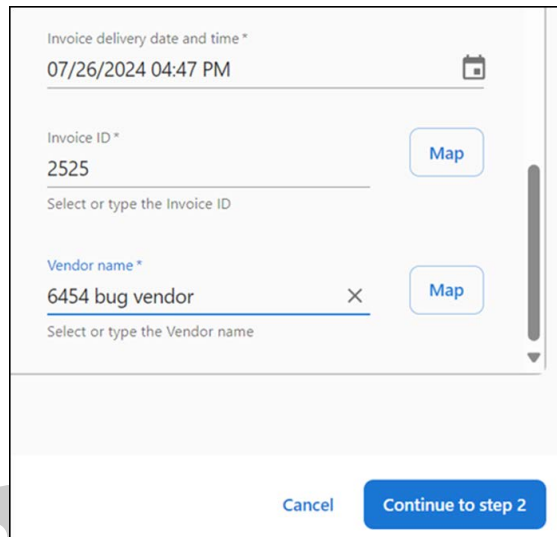
DRAFT

Mapping invoice information

Once you successfully upload an image of an invoice, you must go through the mapping process to ensure the invoice details map to the correct value.

Step 1: Invoice information mapping

1. With the 'Invoice upload validation' screen active, verify your **invoice details** are mapped correctly. If you need to make a change, re-map the invoice details to the correct value or manually type them.



The screenshot shows a form titled 'Invoice delivery date and time *' with a calendar icon. Below it, the date and time '07/26/2024 04:47 PM' are displayed. The next section is 'Invoice ID *' with the value '2525' and a 'Map' button. Below this is a text input field with the placeholder 'Select or type the Invoice ID'. The next section is 'Vendor name *' with the value '6454 bug vendor' and a 'Map' button. Below this is a text input field with the placeholder 'Select or type the Vendor name'. At the bottom of the form are 'Cancel' and 'Continue to step 2' buttons.

Adding mapping details

- a. To remap invoice details, click **Map** next to the data you need to update.
 - b. Select the **correctly identified text box** to map to and then click **Apply**.
 - c. Repeat as **many times as needed** to correctly map the data.
2. Enter the **Invoice ID**. (Should this be verify or remap?)
 3. Enter the **Vendor name**. (Should this be verify or remap?)

4. Click **Continue to step 2**. The 'Page column mapping' screen appears with instructions for **Step 2: Page column mapping**.

Step 2: Page column mapping

[How to map invoice columns](#)

To ensure the invoice is read correctly, map as many columns below as possible. If the invoice does not contain many columns, we recommend you continue this process manually. [Learn More](#)

Item code		Unlink
Name / Description		Unlink
Size		Unlink
Unit		Unlink
Received quantity	Unmapped	Link
Price		Unlink
Tax	Unmapped	Link

[Back](#) [Continue to step 3](#)

'Page column mapping' screen

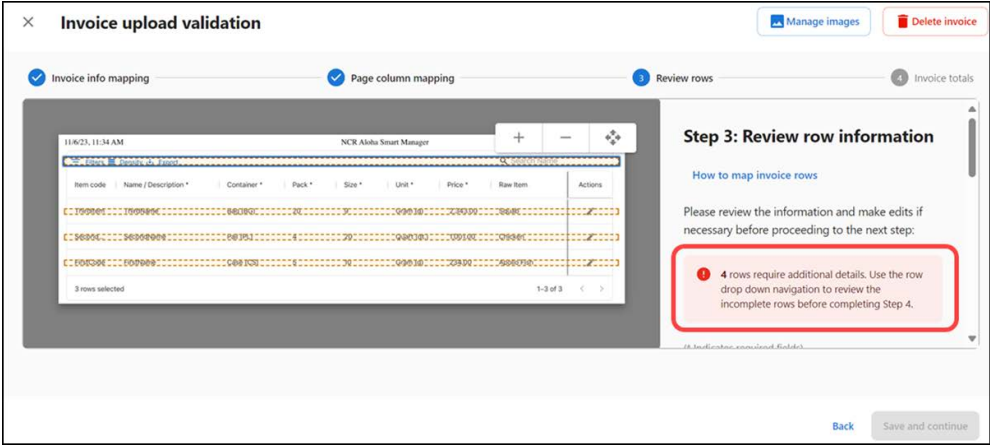
5. Continue to the **next procedure**.

Step 2: Page column mapping

1. Review the mapped values for each column in your invoice to ensure each column value mapped correctly. To make a change, click the pencil icon and manually adjust the highlighted area using the provided anchor points. You may edit, unlink, or link your data to the correct values. You can

see how the value has been mapped by hovering over the highlighted rectangle on your invoice or column value.

- 2. Click **Continue to step 3**. The review progresses and the 'Review row information' screen appears with instructions for **Step 3: Review row information**.



'Review row information' screen

- 3. Continue to the **next procedure**.

Step 3: Review row information

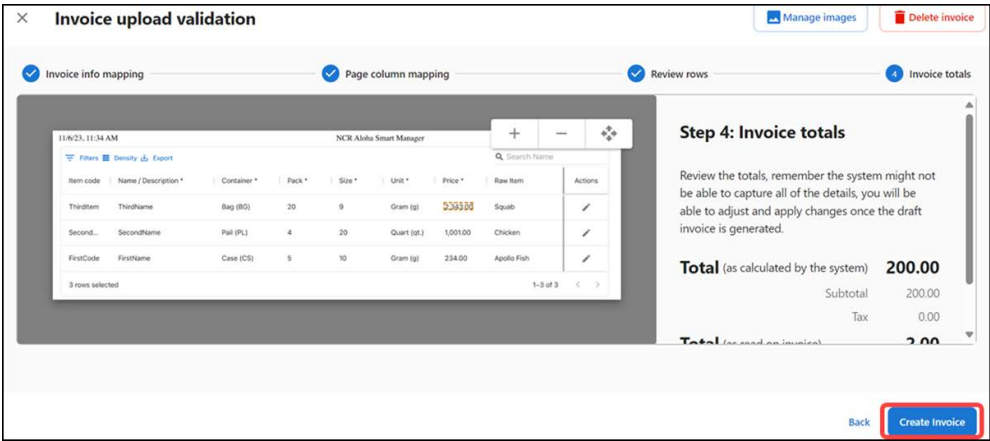
- 1. Review and correct the **item details** before submitting your invoice. Items that are already identified within the catalog are auto-populated with the registered details. For new items, you

can **edit** all item details in your invoice. Based on the modifications, the system enables you to continue.

Note

For items that are recognized in the catalog, you can edit only the quantity, price and tax of the item.

- 2. Click **Save and continue**. The 'Invoice upload validation' screen appears with instructions for **Step 4: Invoice totals**.

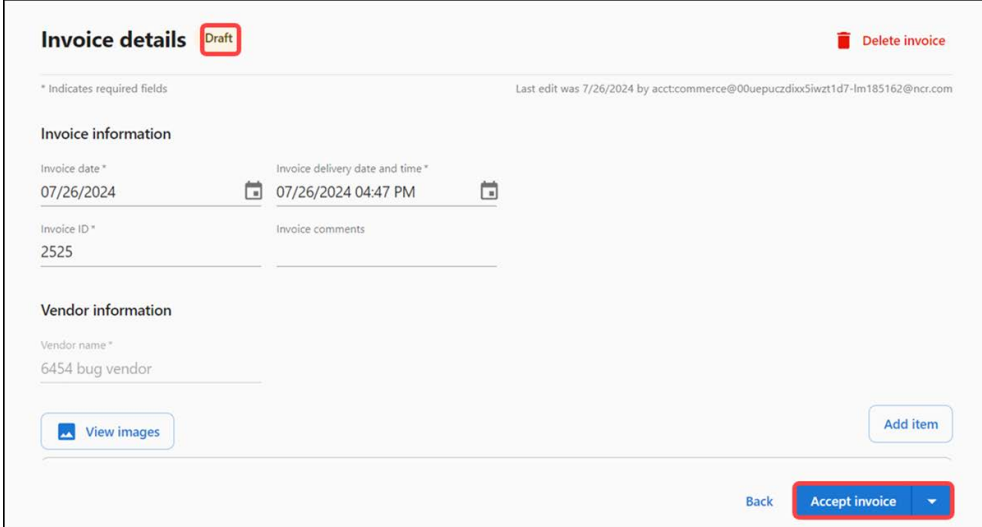


'Invoice upload validation' screen

- 3. Continue to the **next procedure**.

Step 4: Invoice totals

1. Click **Create invoice**. The 'Invoice details' screen appears. Upon the invoice creation, initially the invoice status is in Draft.



The screenshot shows the 'Invoice details' screen with a 'Draft' status. The page includes a 'Delete invoice' link in the top right. A note indicates that asterisks (*) denote required fields. The 'Invoice information' section contains fields for 'Invoice date *' (07/26/2024), 'Invoice delivery date and time *' (07/26/2024 04:47 PM), 'Invoice ID *' (2525), and 'Invoice comments'. The 'Vendor information' section has a 'Vendor name *' field with the value '6454 bug vendor'. At the bottom, there are 'View images' and 'Add item' buttons. A 'Back' button and an 'Accept invoice' button (highlighted with a red box) are located at the bottom right.

'Invoice details' screen

2. Click **Accept invoice** to accept the invoice and continue to finalize the invoice details.
3. Click **Back** to return to the 'Invoice list' screen.

Aloha Smart Manager, Starter User Guide

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