NCR VOYIX

Aloha Smart Manager Starter User Guide

Last Updated: February 28, 2025

DRAFT

Copyright and Trademark Information

The products described in this document are proprietary works of NCR Voyix.

NCR Voyix is a registered trademark of NCR Voyix.
Aloha is a registered trademark of NCR Voyix.
Microsoft and Windows are registered trademarks of Microsoft Corporation in the United States and/or other countries.

All other trademarks are the property of their respective owners.

It is the policy of NCR Voyix to improve products as technology, components, software, and firmware become available. NCR Voyix, therefore, reserves the right to change specifications without prior notice.

Not all features, functions and operations described herein are available in all parts of the world. In some instances, photographs are of equipment prototypes; therefore, before using this document, consult with your NCR Voyix representative or NCR Voyix office for the most current information.

© 2025 NCR Voyix
Atlanta
Georgia
USA
www.ncrvoyix.com
All Rights Reserved

Revision Record

Date	Description of Change

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Contents

Getting Started with Aloha Smart Manager 1
Signing in and logging out of Aloha Smart Manager 1
Working with the dashboard 4
Changing the date to report 5
Changing the site 6
Working with your account 7
Establishing your account profile, preferences, and login credentials 7
Configuring your local system settings 11
Configuring and using notification groups 13
About Labor 20
Working with employees 21
Onboarding a new employee 22
Granting permissions and access 41
Managing employment statuses 44
Changing the pay rate for a job 47
Assigning a job to an employee 48
Removing a job from an employee 49
Working with schedules 51
Understanding the 'Schedule' screen 51
Selecting a schedule week 53
Adding a shift 54
Filtering shifts by job or employee 58
Publishing a schedule 58
Adding an announcement to a schedule 59
Viewing employees on a shift 60
Working with punches 61
Working with reports 69
Approaching overtime threshold 69
Employee payroll 71
About Inventory 74
Working with raw items 75
Working with vendors 84
Working with vendor items 88
Working with invoices 98
Capturing invoice details 98
Deleting an invoice 105
Viewing invoice history report 106
About Sales 110
Working with sales reports 113

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Sales summary 113
Profit & loss 117
Product mix 120
Payments 125
Revenue centers 128
Taxes 131
Discounts 133
Refunds 135
Voids 137
Viewing transactions 139
POS event log 144
Managing Company links 147
Viewing the Activity Log 151
About Settings 154
Working with 'Organization settings' 155
Viewing site information 155
Configuring the fiscal calendar 156
Working with 'Site settings' 158
Viewing Site Settings 158
Configuring the payroll calendar for a site 160
Configuring a day part 162
Working with Labor settings 164
Configuring Jobs 164
Making a job inactive 166
Appendix A: Bulk importing vendors and vendor items 169
Uploading vendors in bulk 169
Uploading vendor items in bulk 173
Appendix B: Uploading an invoice 180
Uploading the invoice details 180
Mapping invoice information 183
Step 1: Invoice information mapping 183
Step 2: Page column mapping 184
Step 3: Review row information 185
Step 4: Invoice totals 187

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

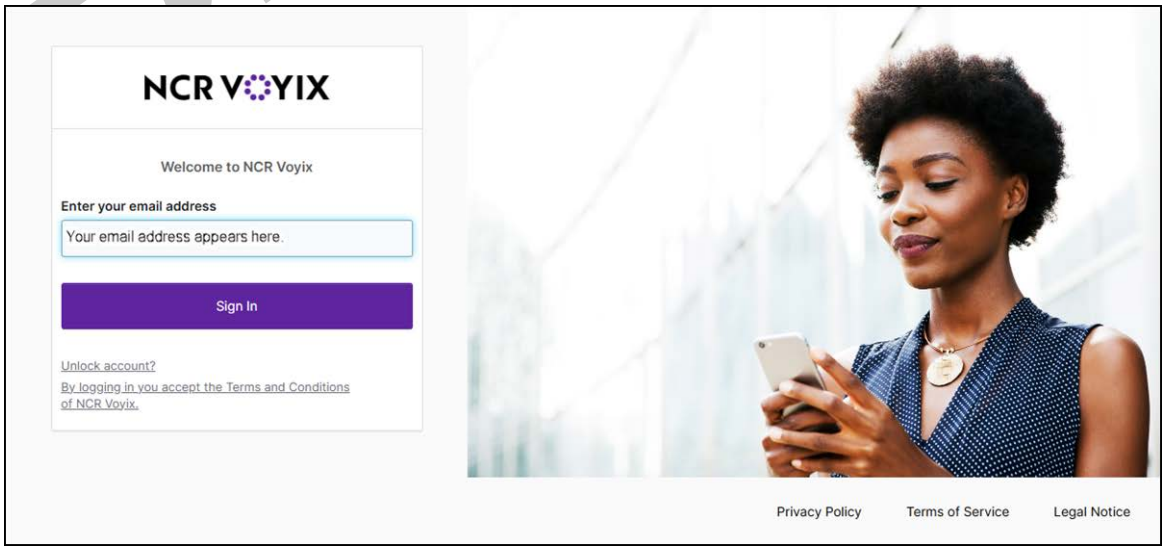
DRAFT

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:

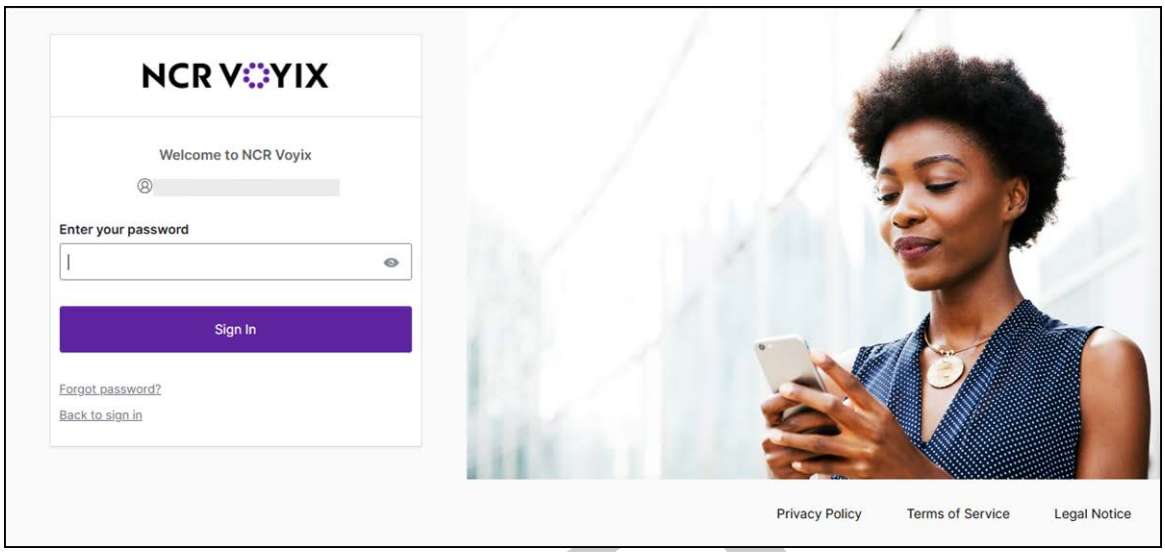
1. Launch **Aloha Smart Manager**. The Welcome to NCR Voyix login screen appears.



Welcome to NCR Voyix email address entry screen

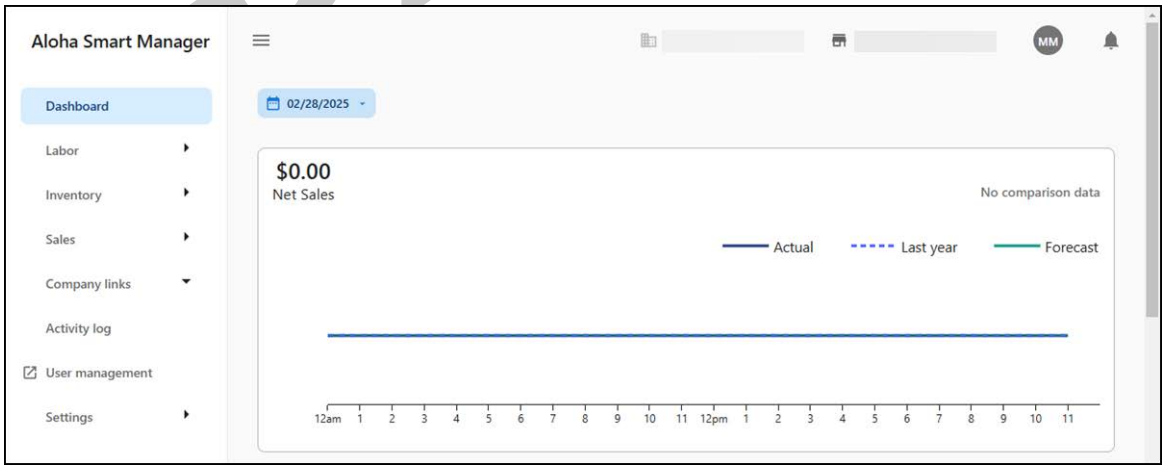
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

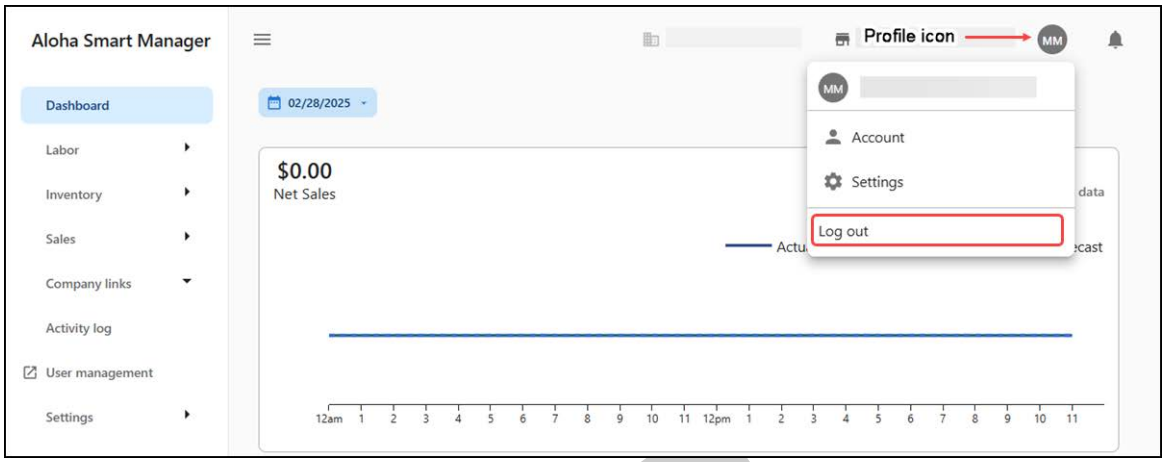


ASM landing page

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To log out of ASM:

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



Logging out of ASM

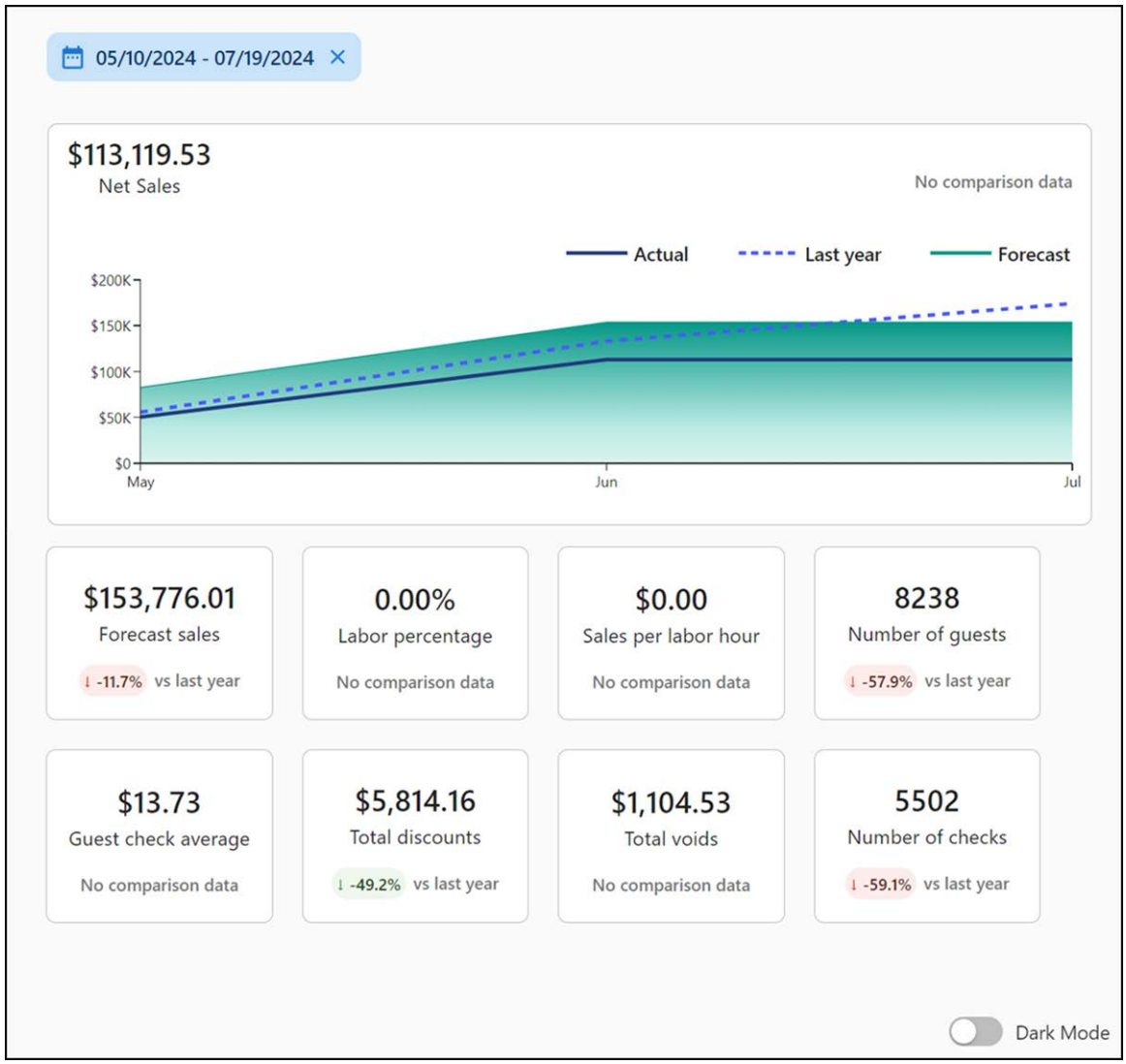
2. Click **Log out**.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

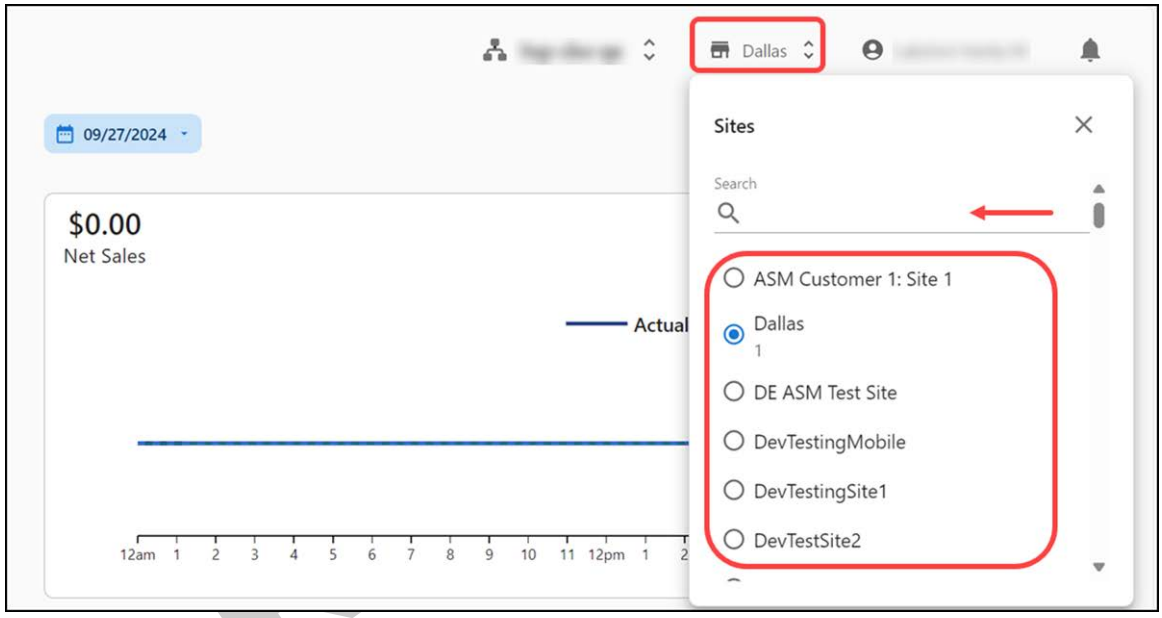
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



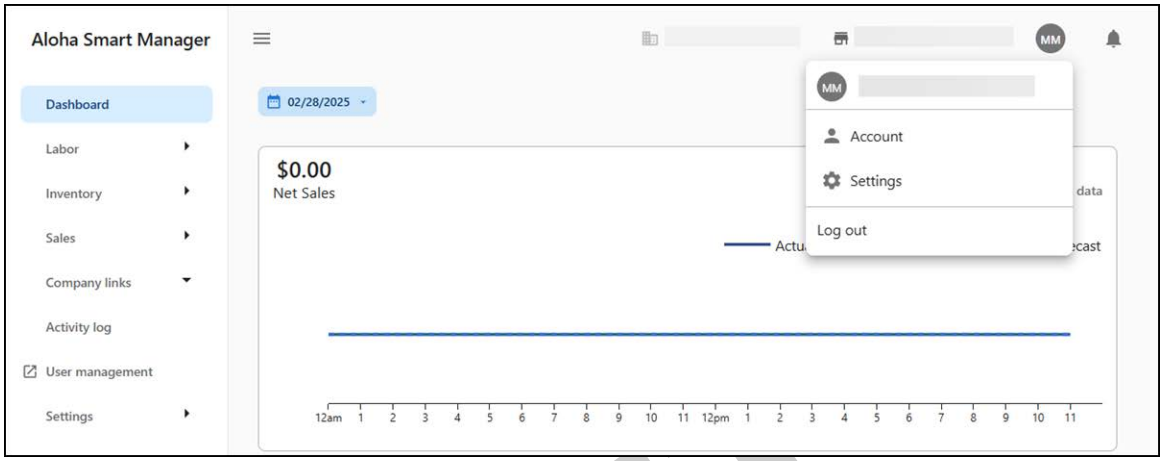
Switching between sites

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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 you selected 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.

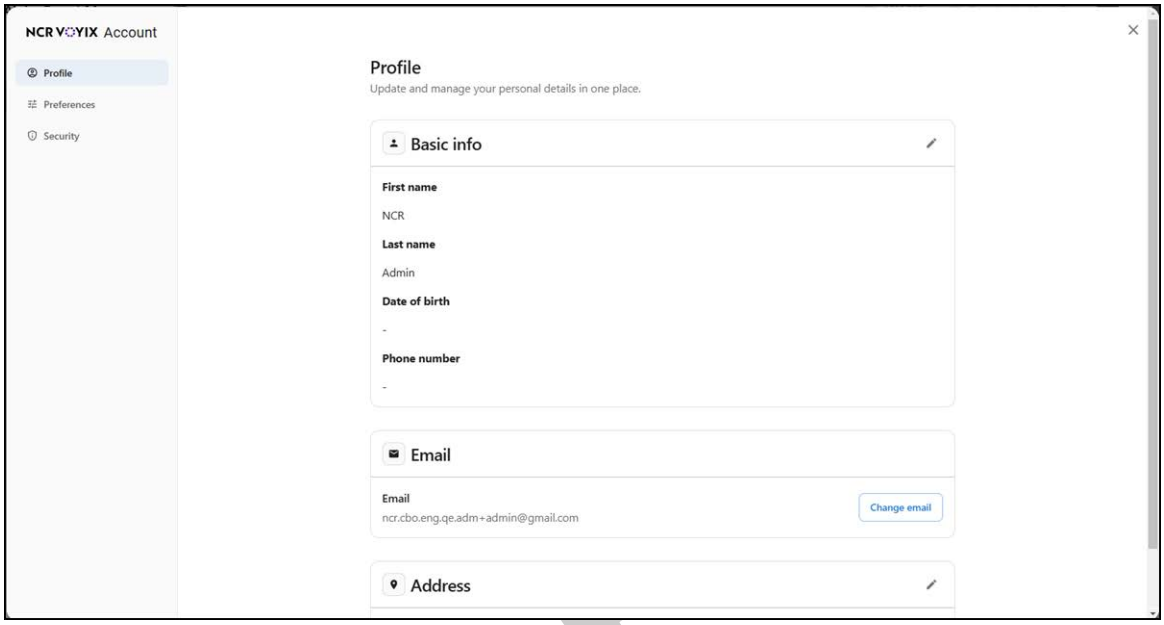
Note

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



Account > 'Profile' screen

DRAFT

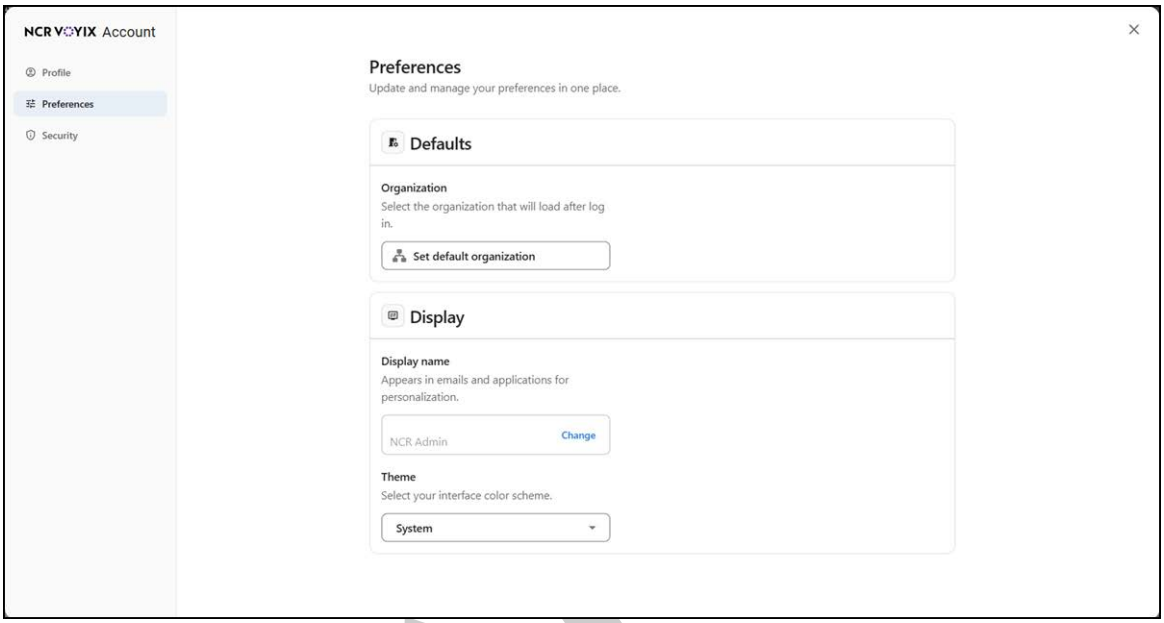
To update your account profile:

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 i**n the top right corner of the screen to exit the **Account** function.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To update your account preferences:

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



Account > 'Preferences' screen

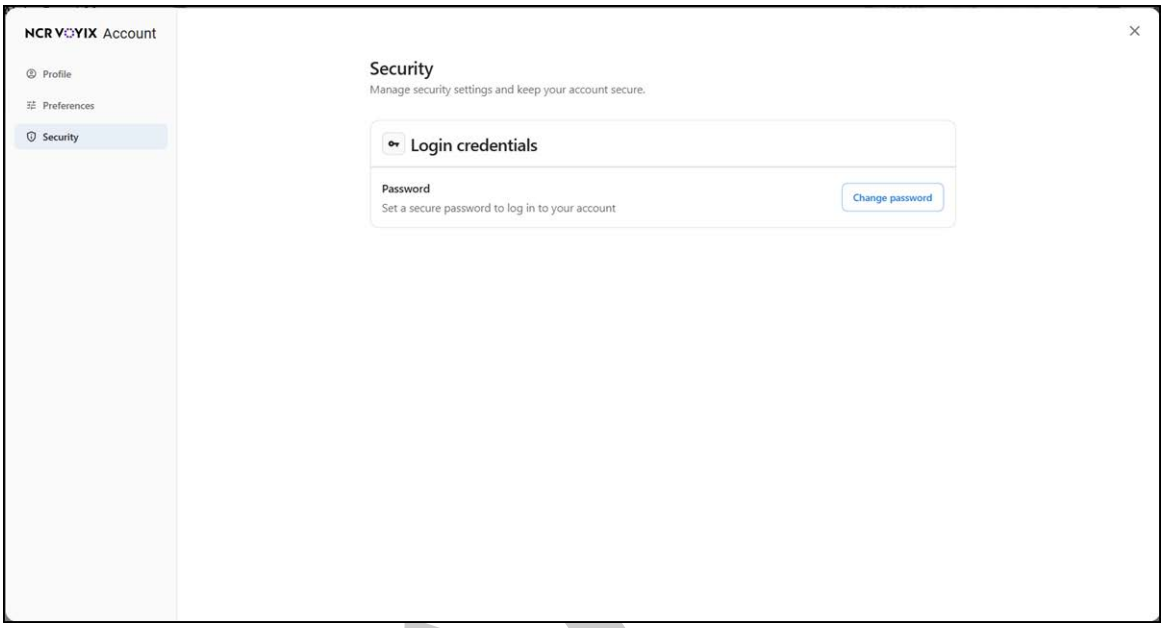
2. Under the 'Defaults' group bar, click **Set default organization** to establish the **organization** that loads upon login.
3. Under the 'Display' group bar, click **Change** under 'Display name' to change the name that appears on the screen when you sign in, and click **Save**.
4. Select the **interface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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Configuring your local system settings

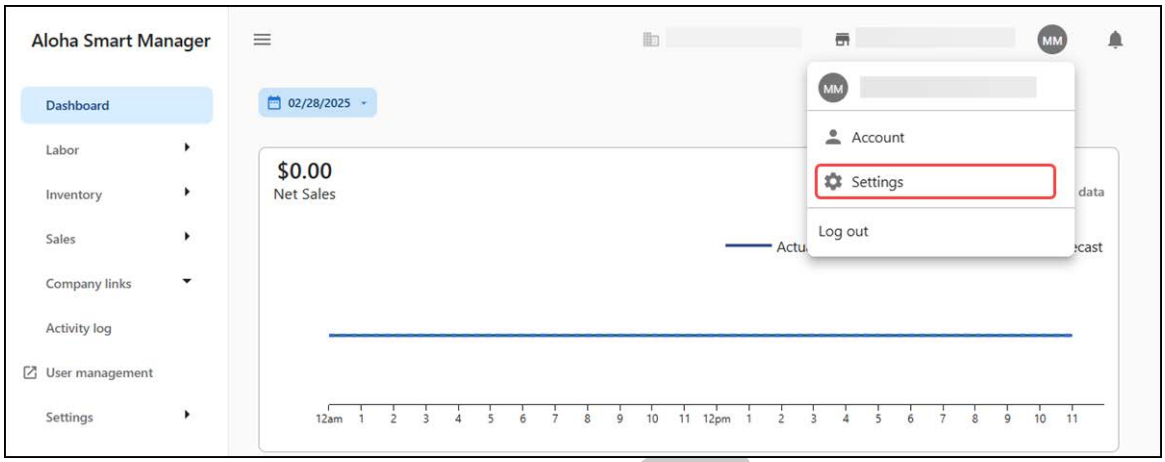
Use the Settings menu option to customize how the application formats dates, times, numbers, and language used throughout the application for your user profile. There are two screens available when you select Settings: Account preferences and Notification settings.

DRAFT

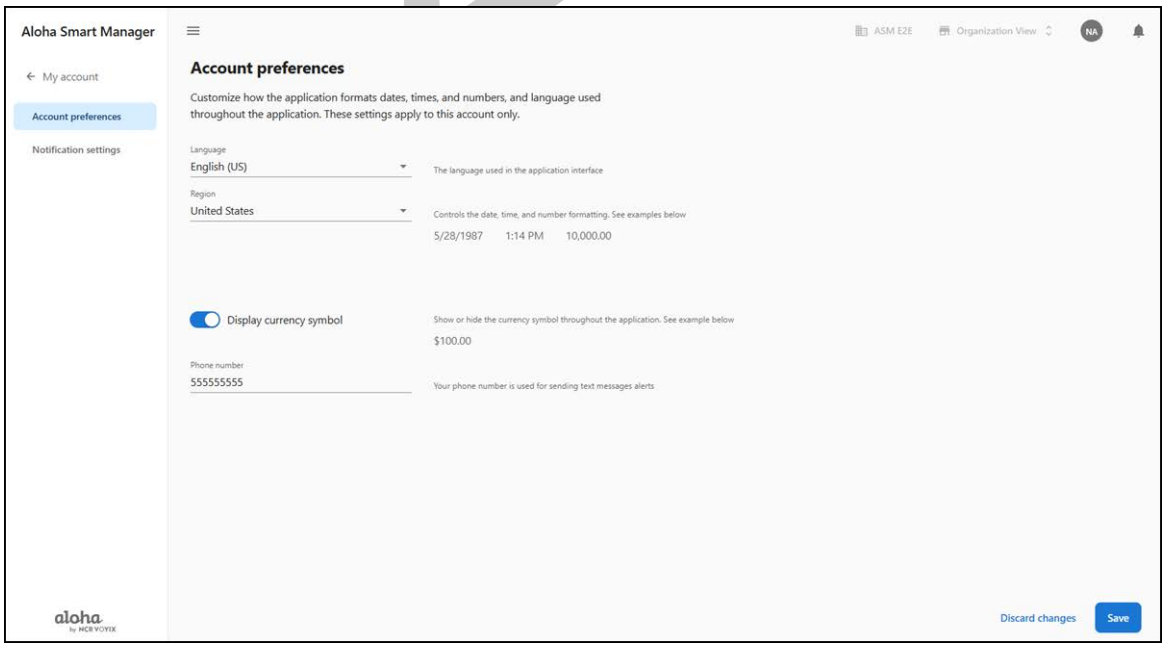
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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:

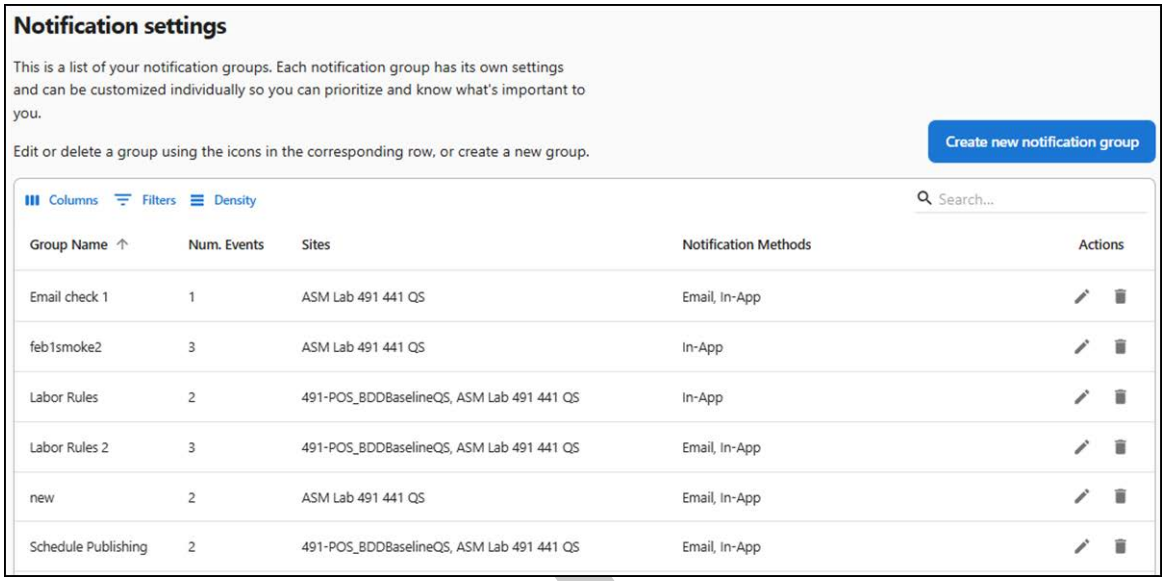
- Let an employee know they did not, or were late to clock in.
- The stock of an inventory item is running low or is at zero.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

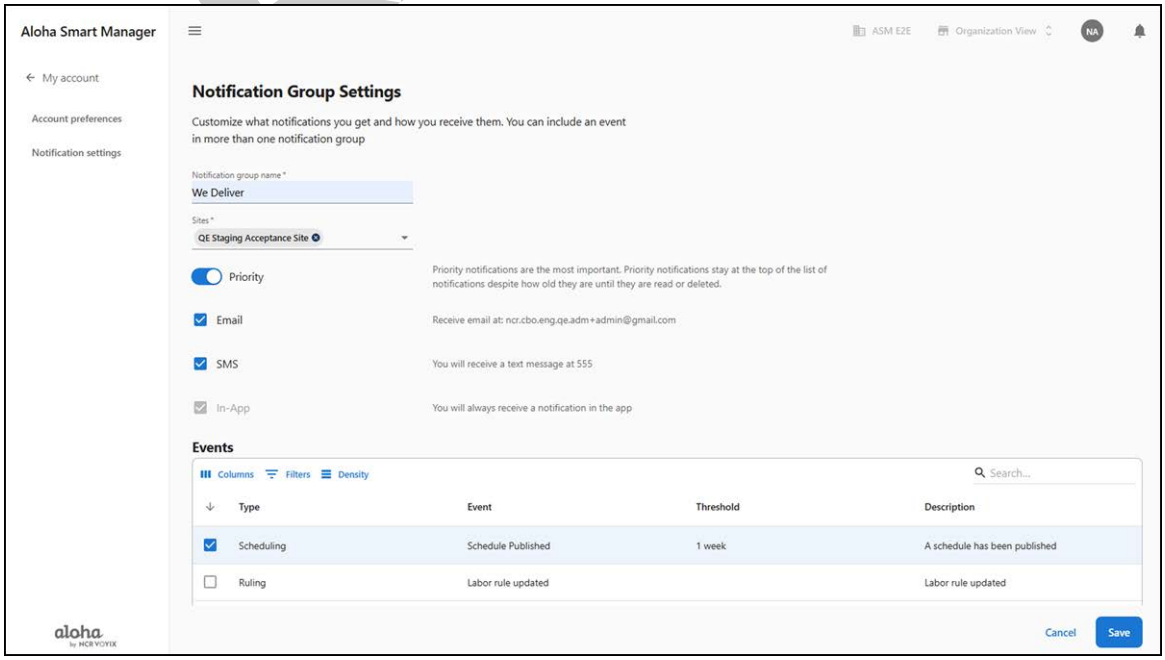
Configuring notification groups

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

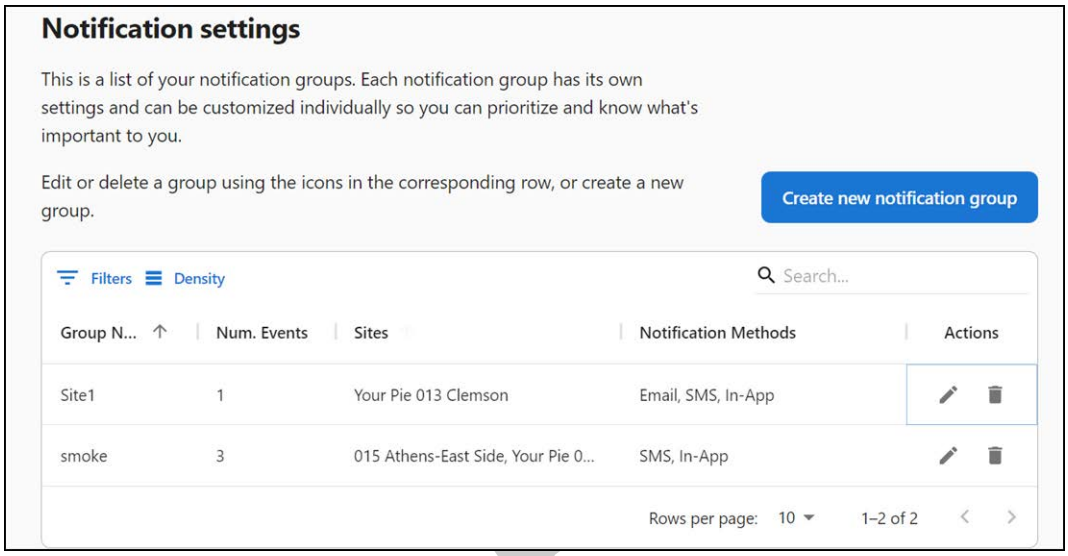
9. Select **In-App** to receive notifications within the application. You can select the 'bell icon' in the top-right corner of the dashboard to view these events.
10. Under the Events section, select the **event(s)** to include in the notification group. You can add multiple events to a single notification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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To edit or delete a notification group:

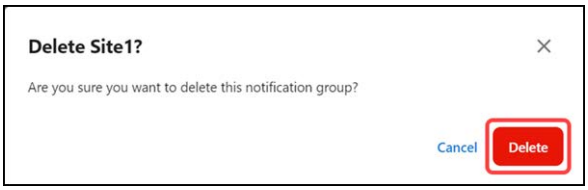
1. Select **Settings > Notification settings**. The 'Notification settings' screen appears with a list of existing notification groups.



'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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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 anormal 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.

DRAFT

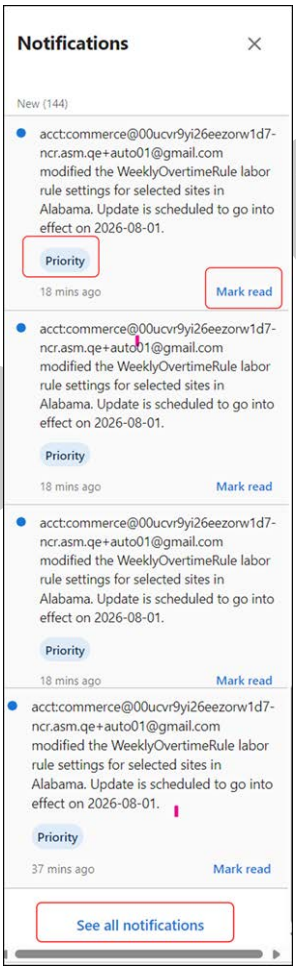
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

All notifications

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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:

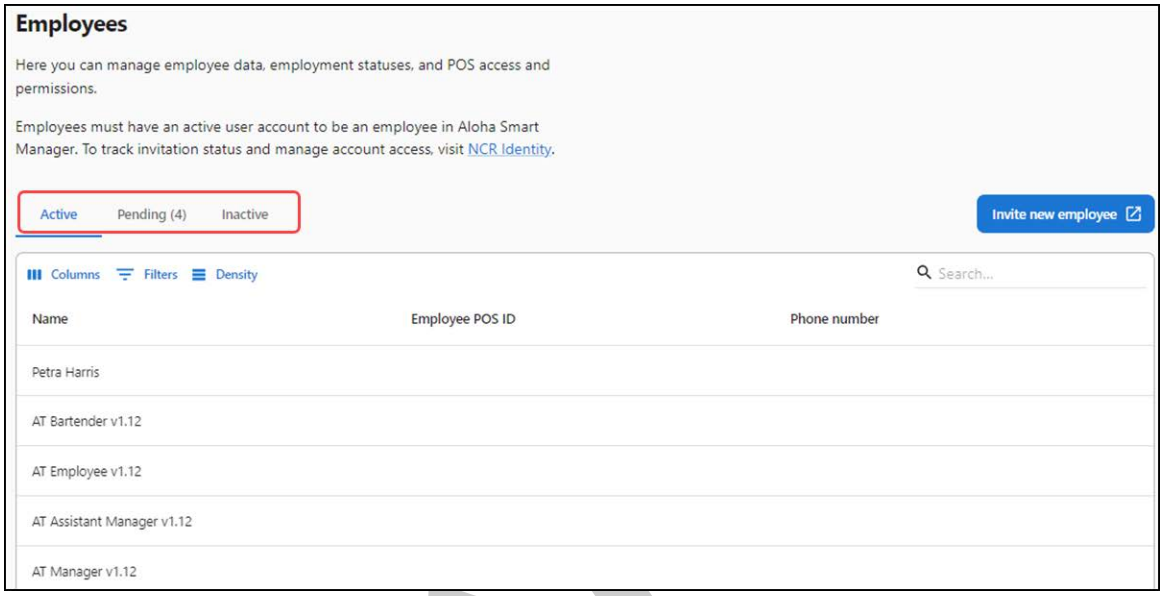
- **Employees** — Provides access to employee information, such as personal information and emergency contacts, and to assign jobs and pay rates to employees.
- **Schedule** — Creates schedules that balance employee availability and business needs to ensure adequate staffing levels are maintained while 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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Working with employees

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



'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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

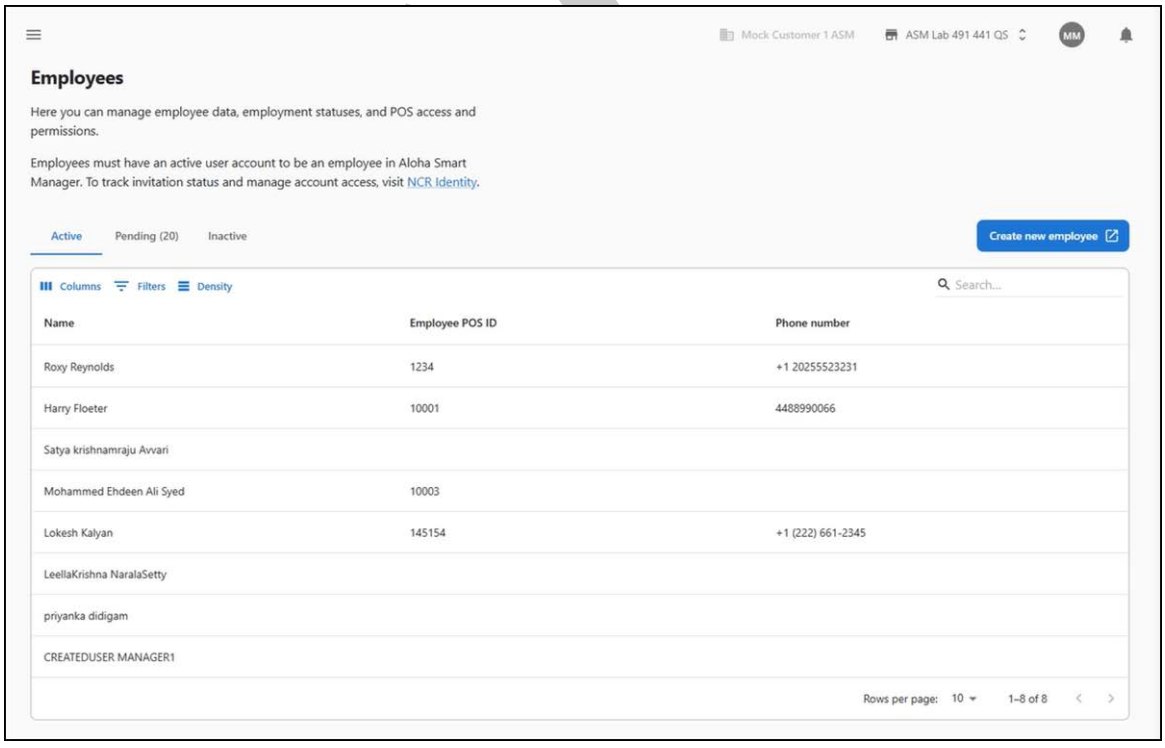
Step 1: Hiring manager creates a new employee

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.

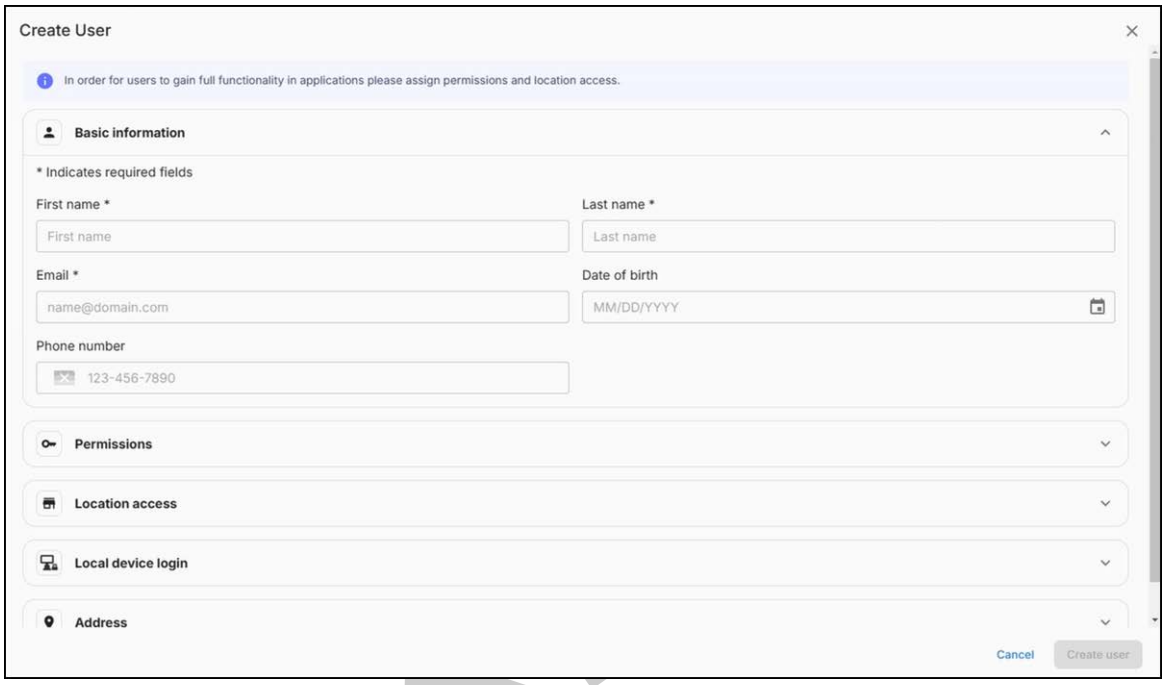
1. Select **Labor** > **Employees**. The 'Employees' screen appears.



'Employees' screen

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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' screen in NCR Identity

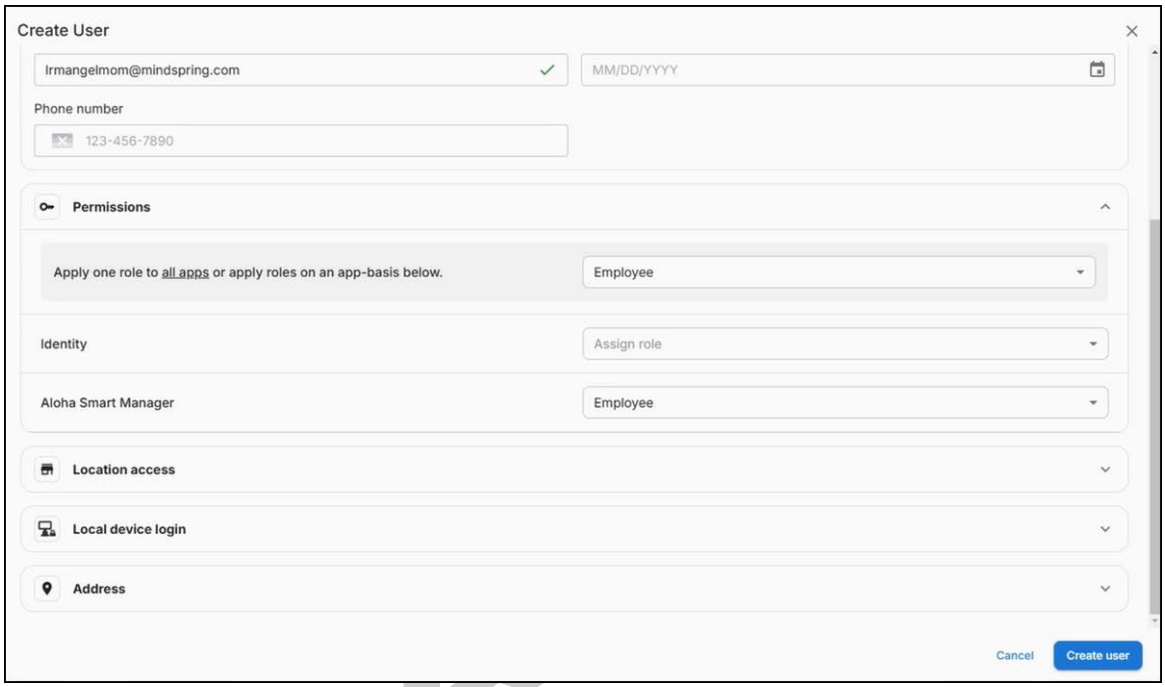
3. Type the **first and last name** of the new employee.
4. Type a valid **email address** for the new employee. ASM uses this email address to send a welcome email to the employee.

> **Warning**
> It 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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

6. 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.



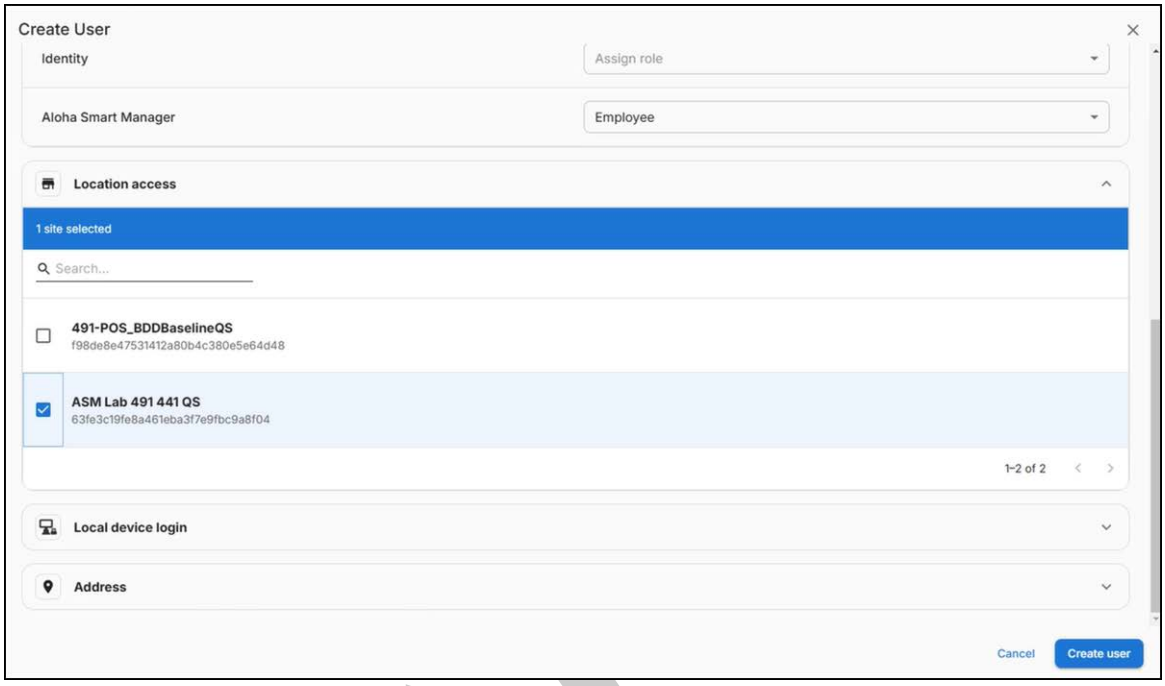
'Permissions' screen

7. 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.

DRAFT

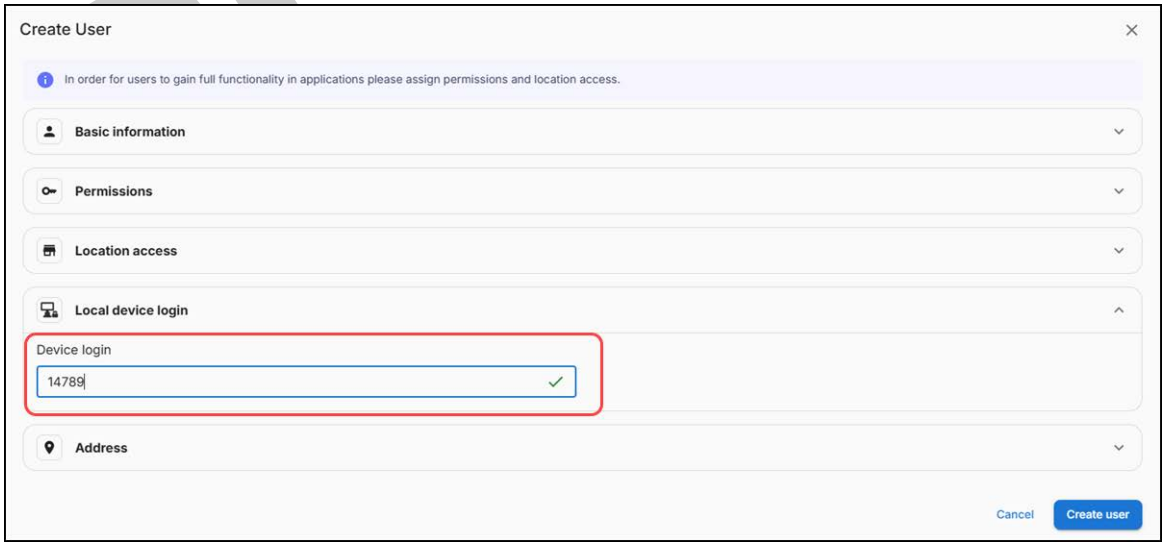
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

8. Expand **Location access**.



'Location access' screen

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

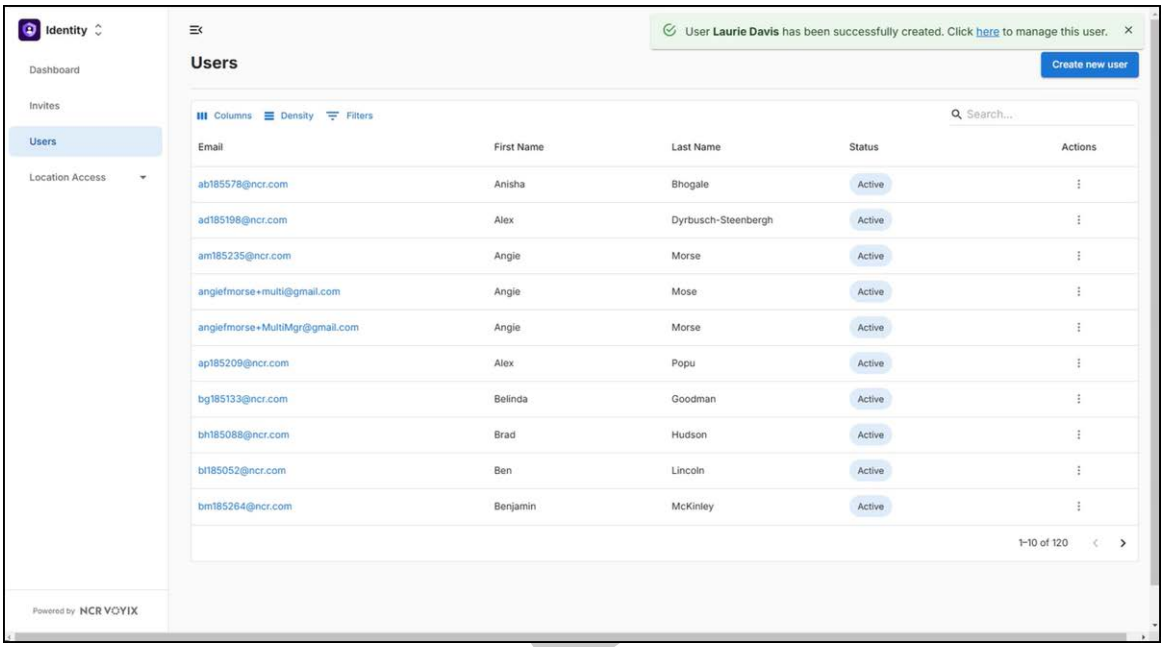


Establish POS login PIN

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



'Create user' success message

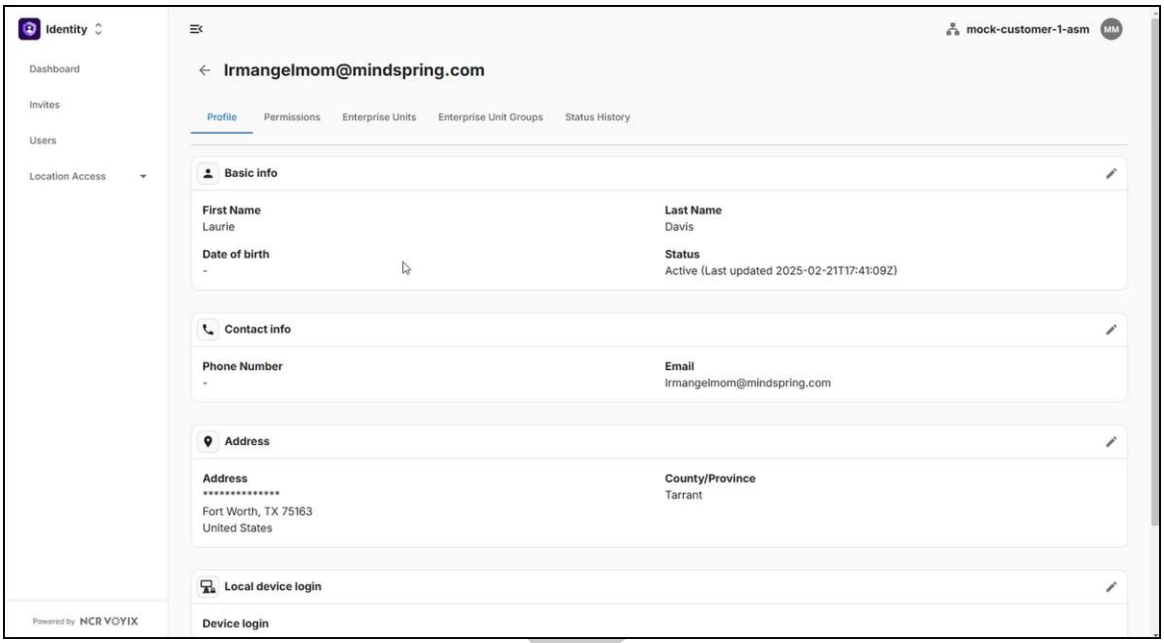
Note

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

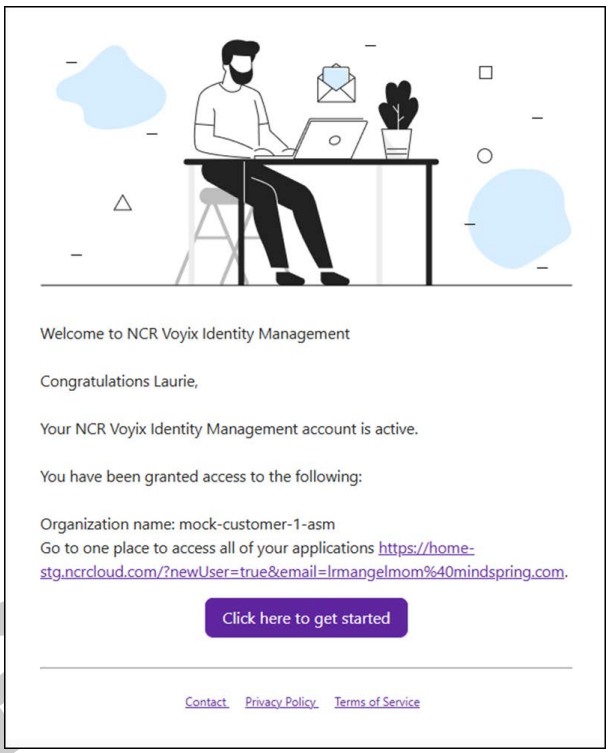
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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**.



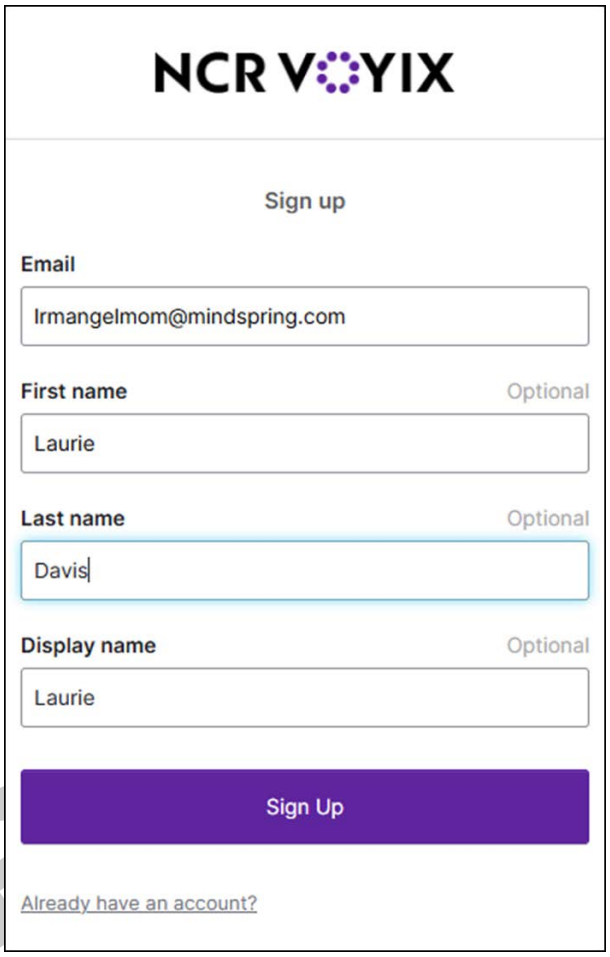
Welcome email

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

appears.

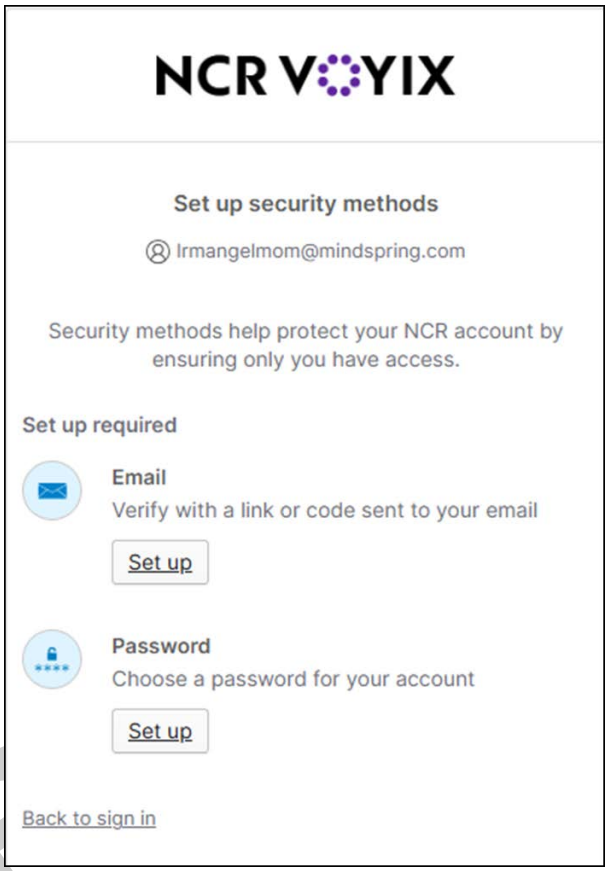


'Sign up' screen

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

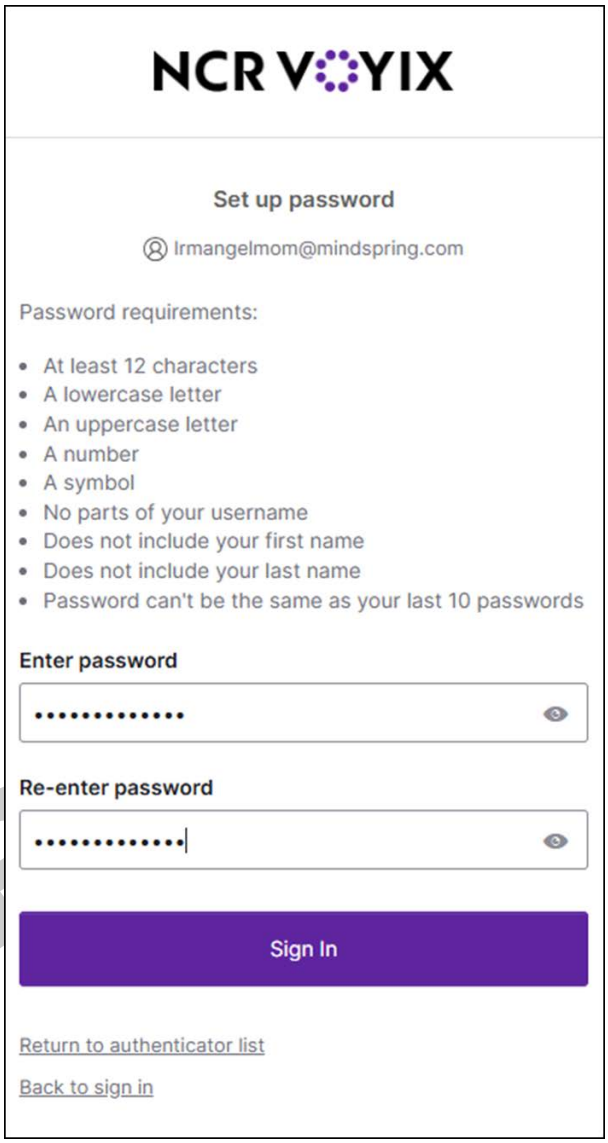


'Set up security methods' screen

DR

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

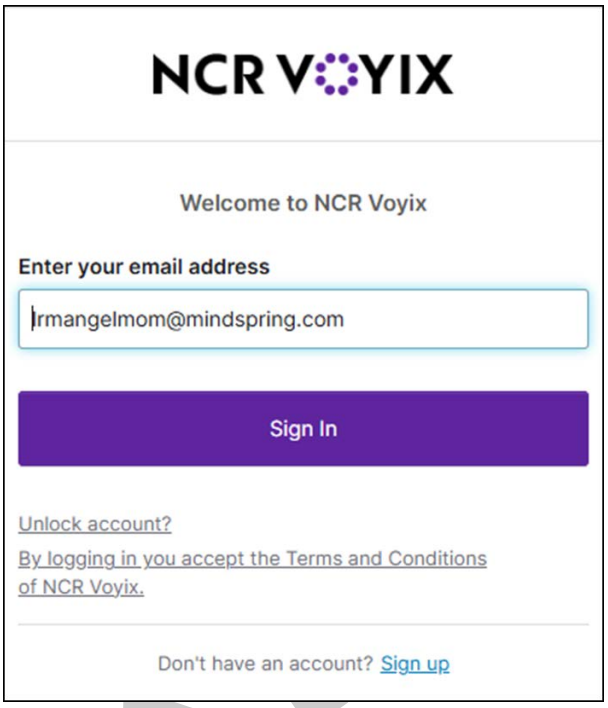


'Set up password' screen

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

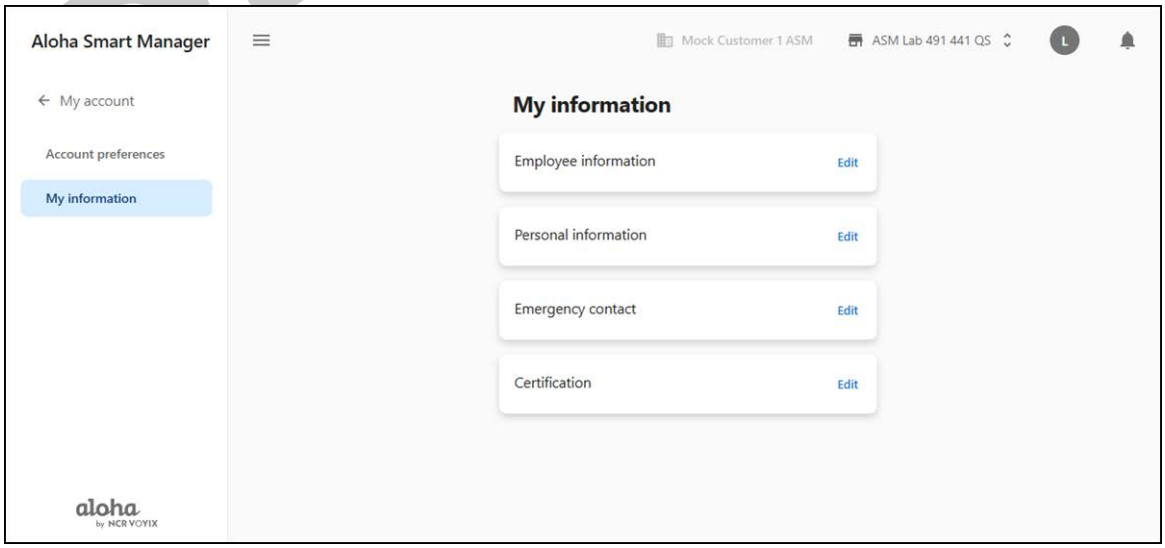


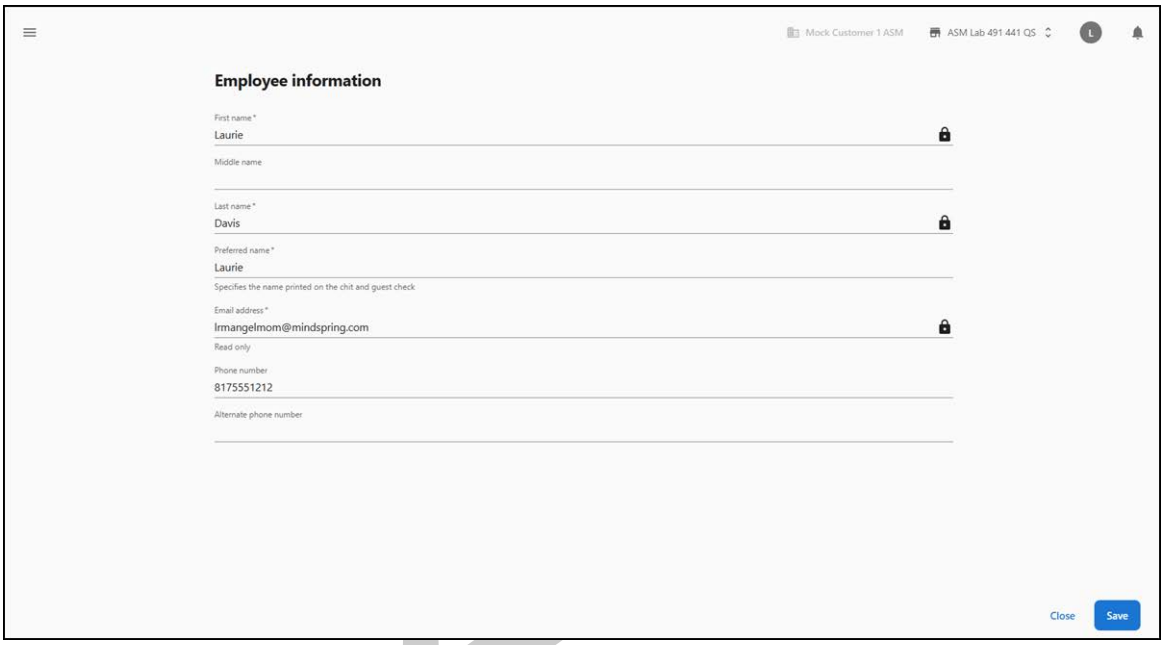
Figure 1 - 1 'My information' screen

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To enter employee information:

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



'Employee information' screen

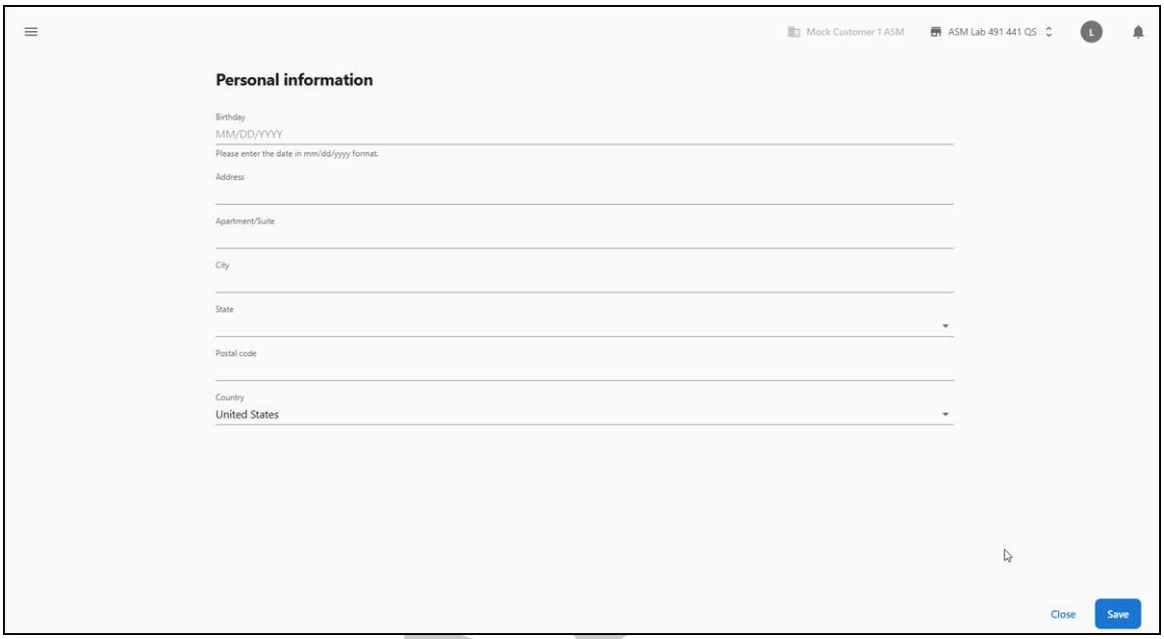
2. Under the 'Personal information' group bar, verify your **first name**, **middle name**, and **last name**.
3. Type your **preferred name**. Use this option to use an abbreviated employee name or a nickname on the chit and guest check. If left blank, ASM uses your first name.
4. Verify your **email 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**.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To enter your personal information:

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



'Personal information' screen

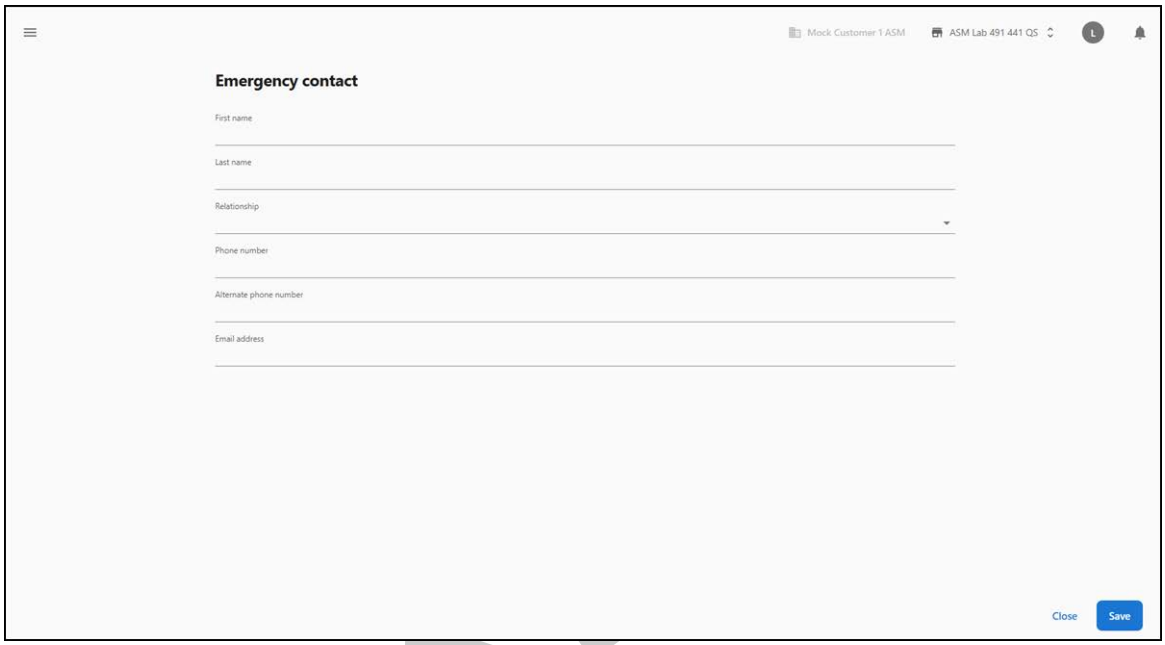
2. Type your **street address**, **city**, and **postal code**.
3. Select the **state of residence** from the drop-down list.
4. Select the **country of residence**.
5. Click **Save**.
6. Click **Close** to return to the 'My information' screen.
7. Continue to the **next procedure**.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To enter emergency contact details:

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



'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**.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To enter certification details:

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

'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.

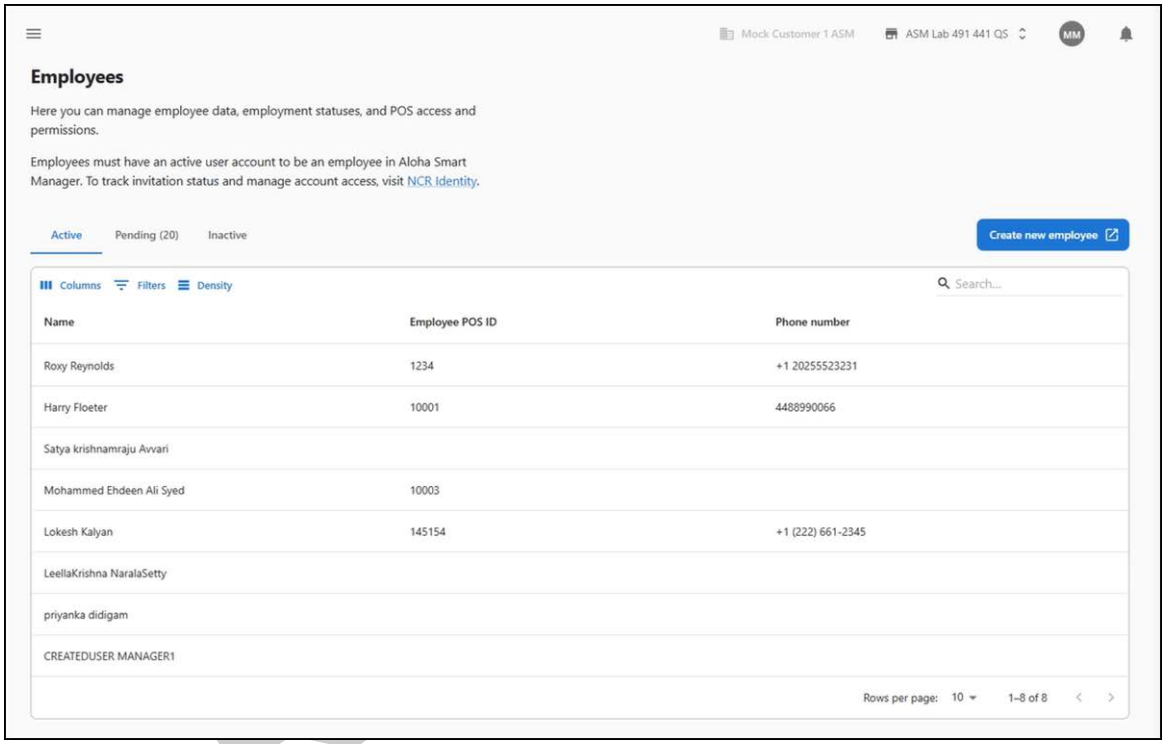
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



Active employees

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

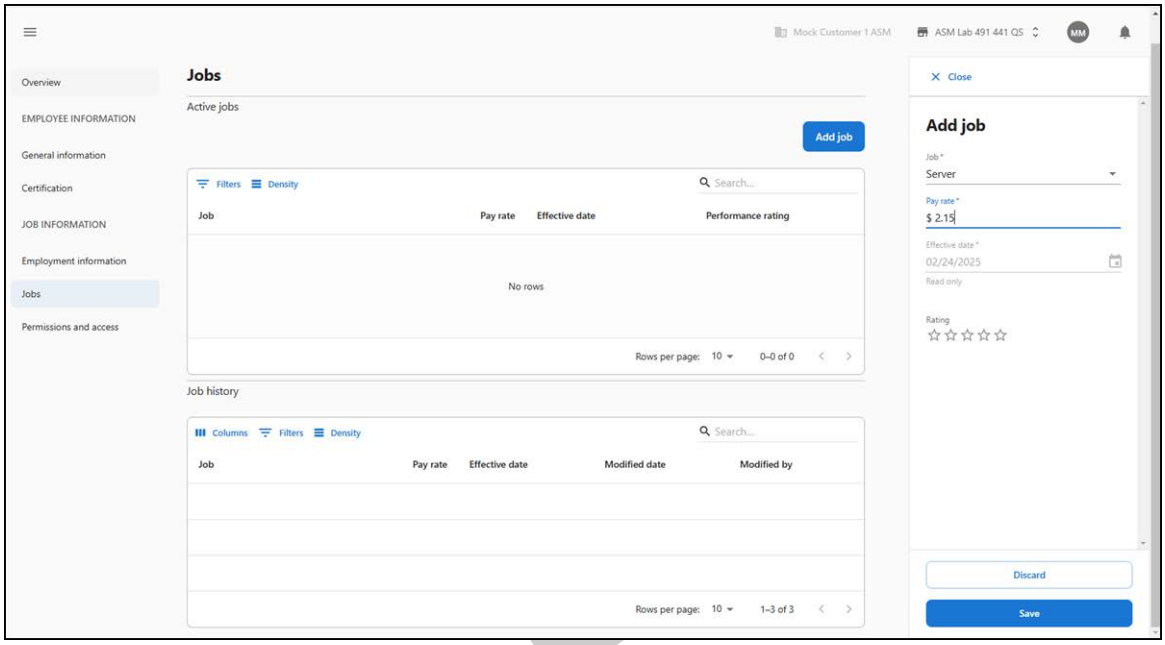
'Overview' screen

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

'Jobs' screen

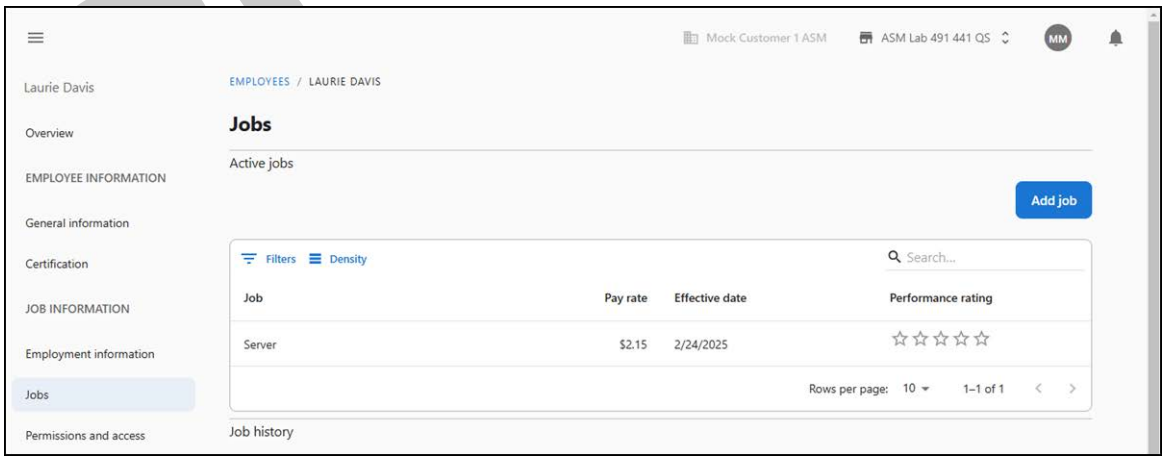
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

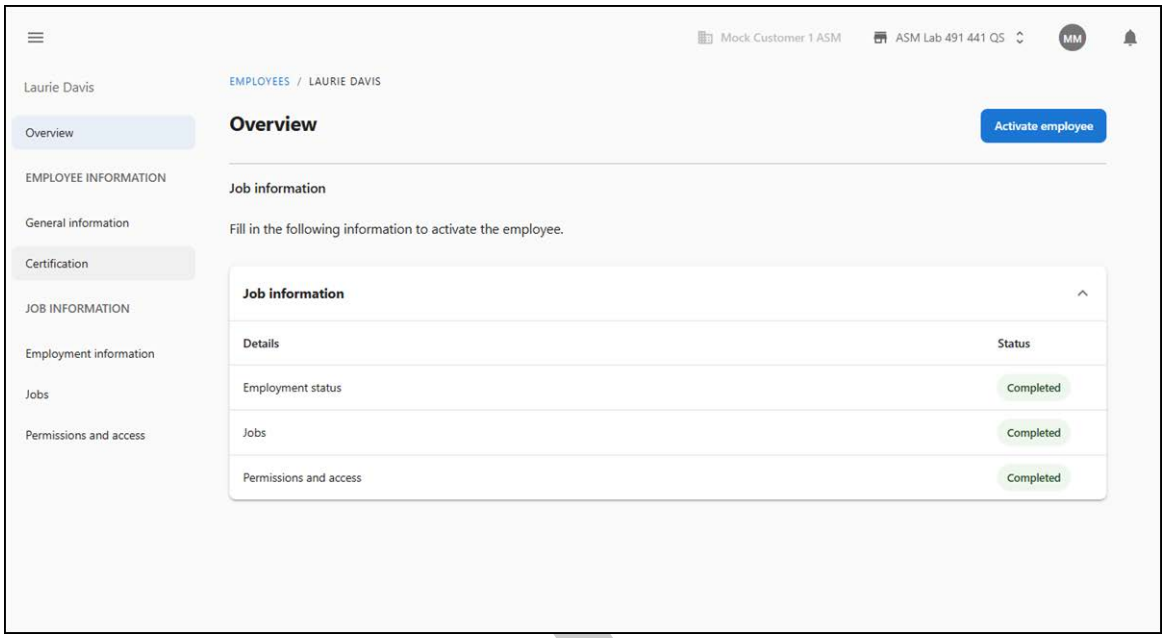


Job added

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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)

DRAFT

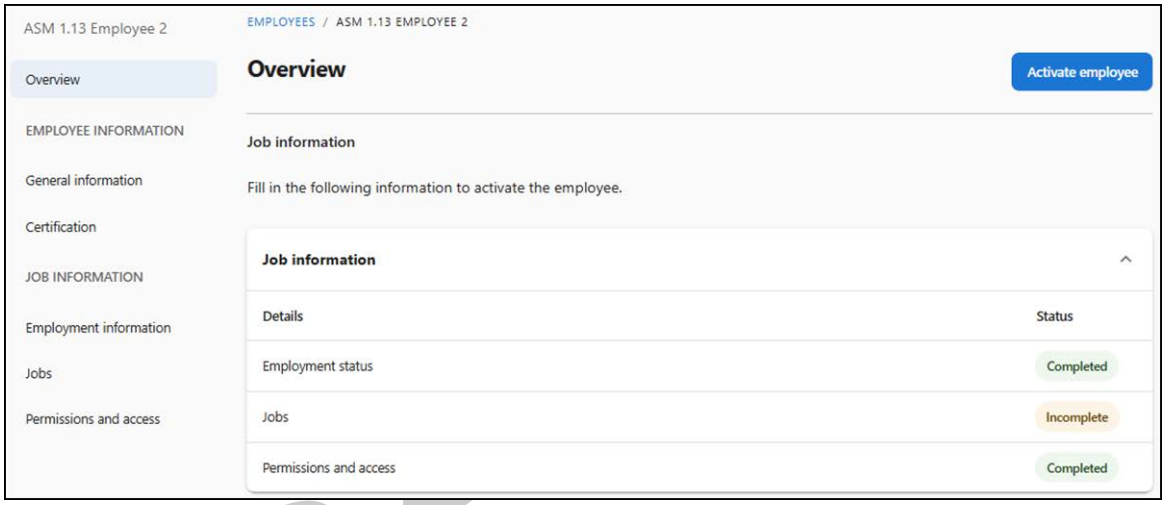
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

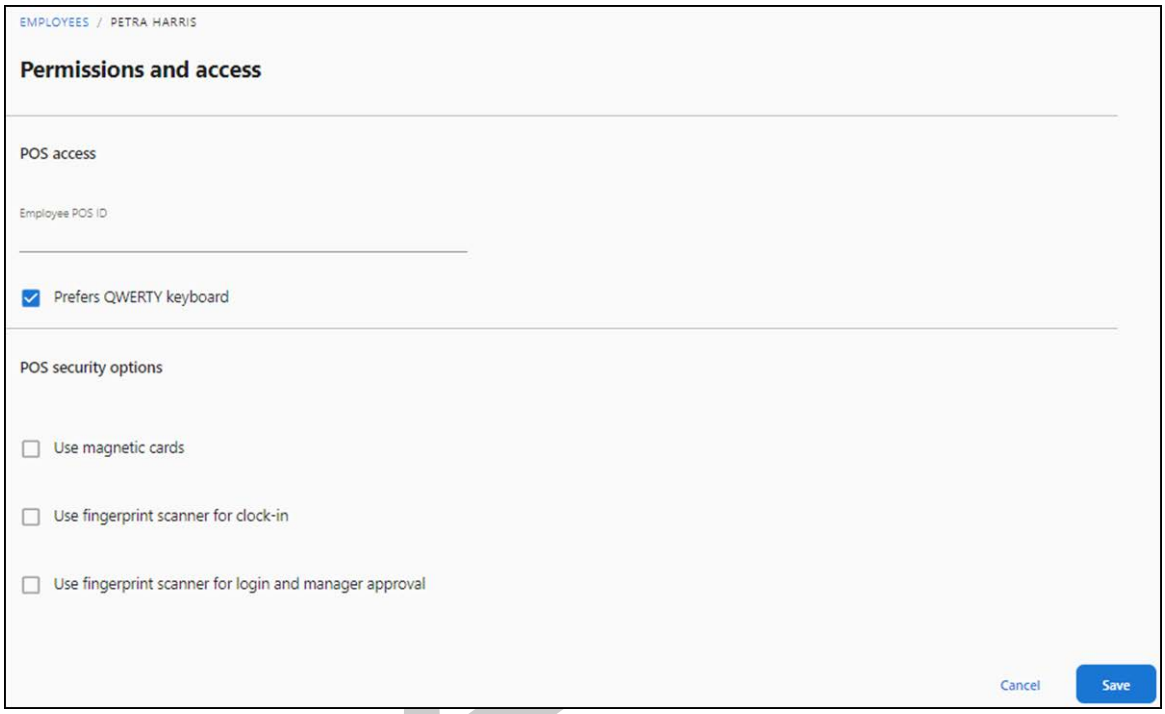


Employee permissions and access

DRA

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

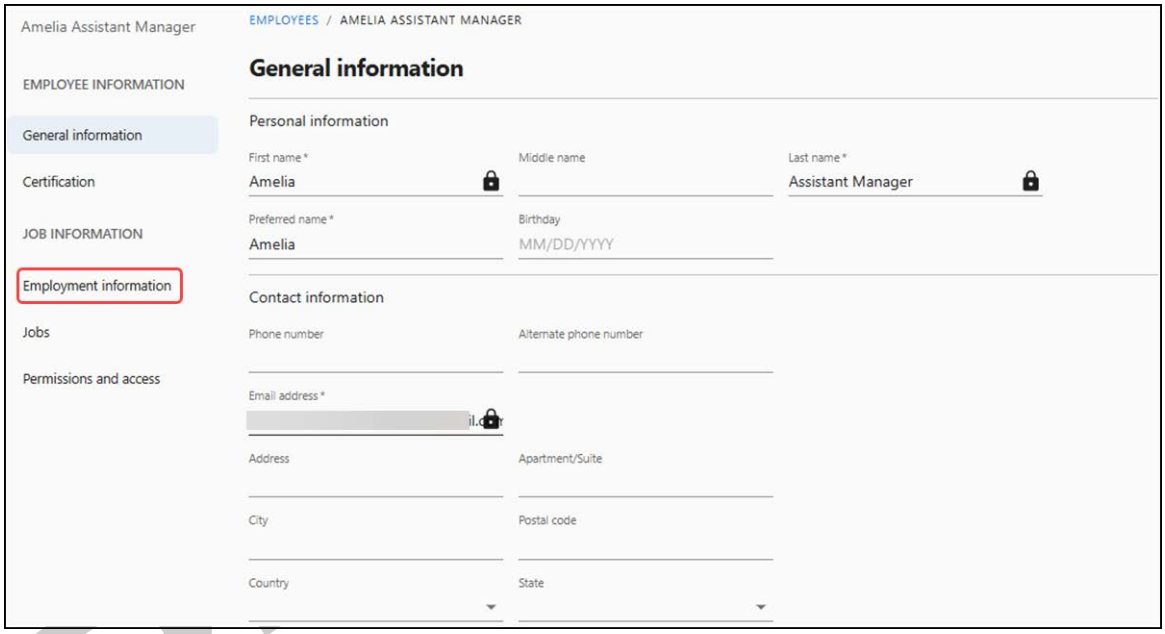
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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:

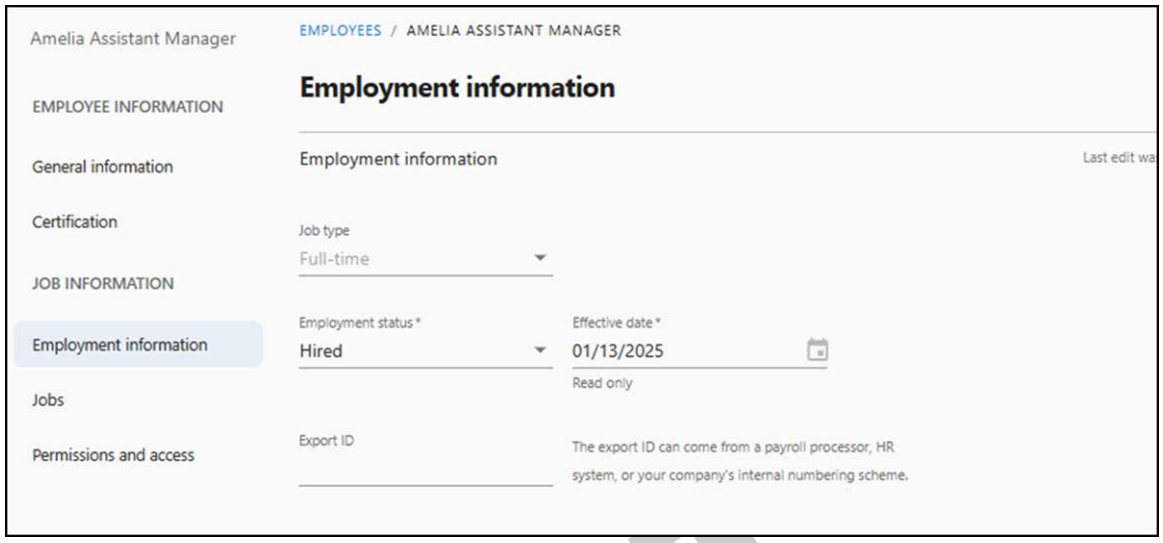
1. Select **Labor** > **Employees**. The 'Employees' screen appears.
2. Select the **employee** from the list. The 'General information' screen appears.



Employee overview

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

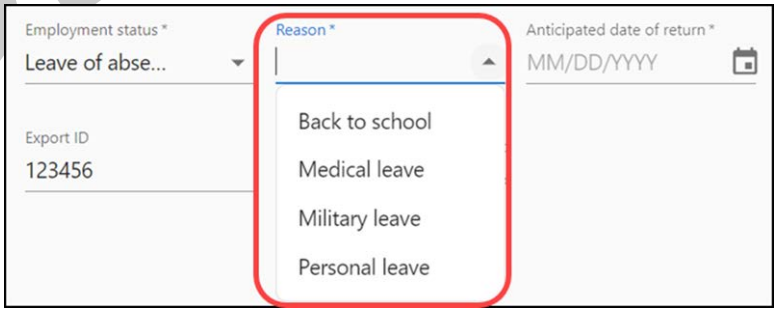


'Employment information' screen

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.

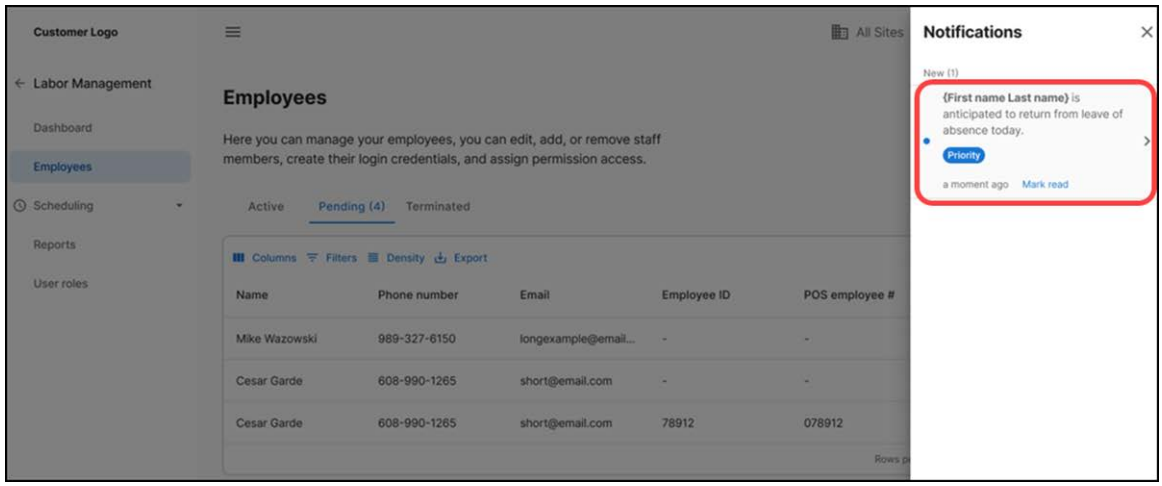
   Select **Leave of absence** to place an employee on leave of absence. You must select a **reason** and the anticipated **date of return**. The manager receives a notification indicating the anticipated date of return.



Employee leave of absence

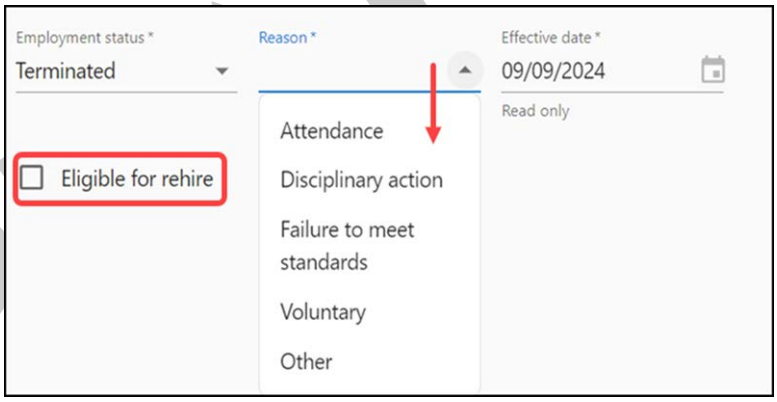
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions



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.

DRAFT

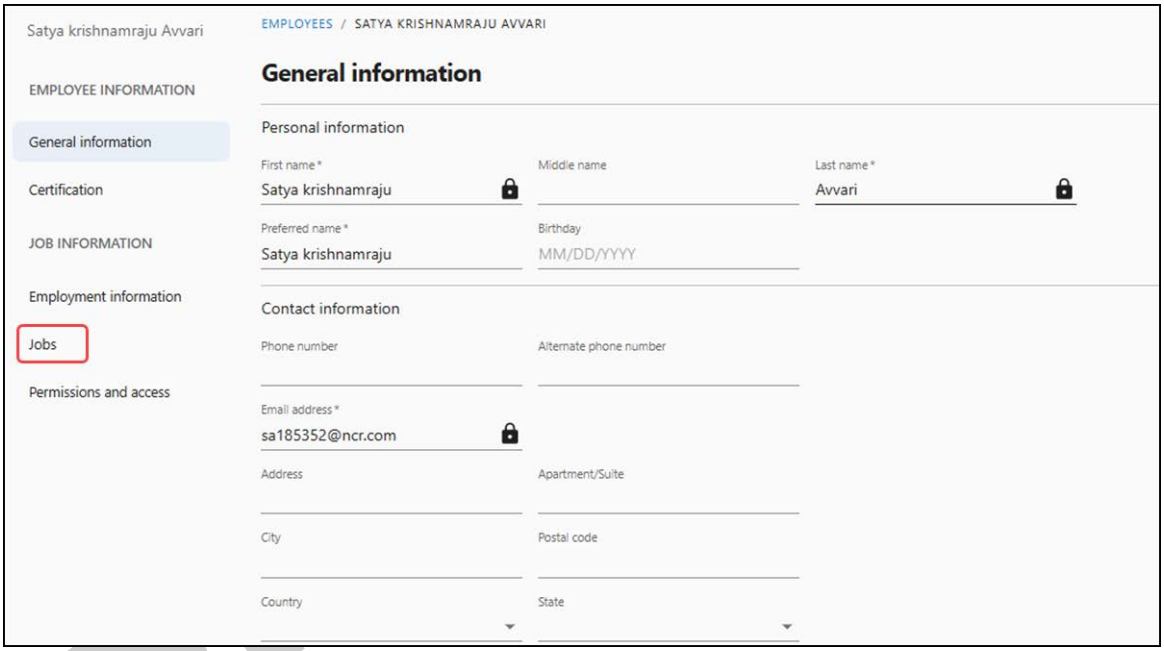
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

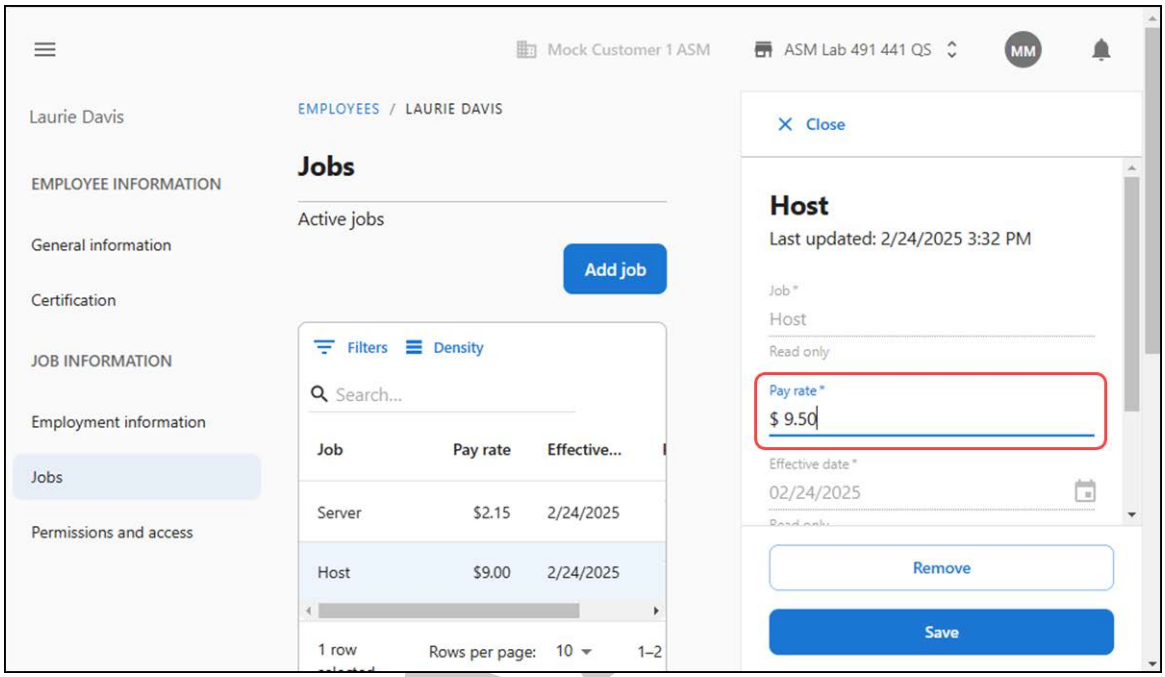


Changing pay rate

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

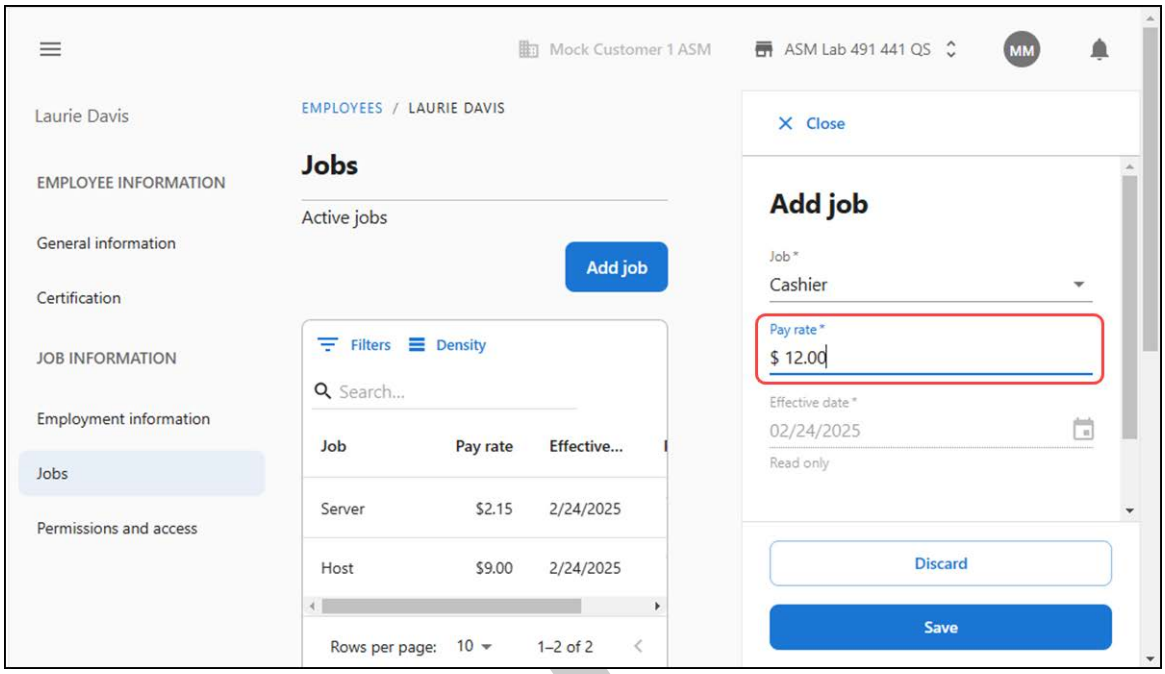
To assign another job to an employee:

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

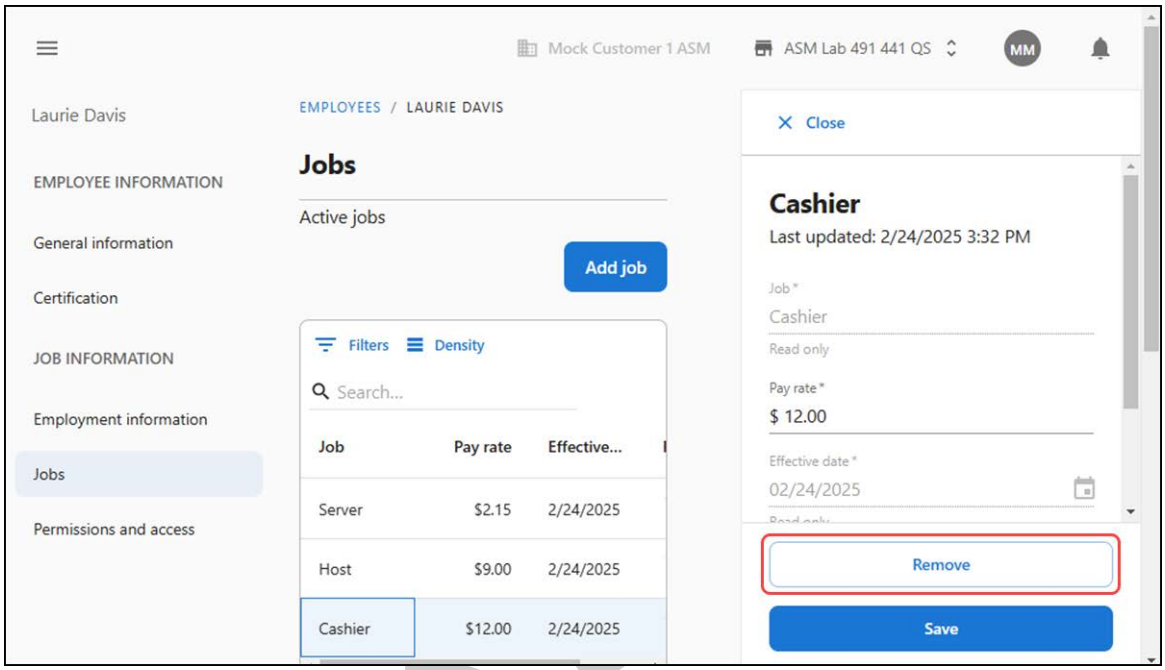
To remove a job from an employee:

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

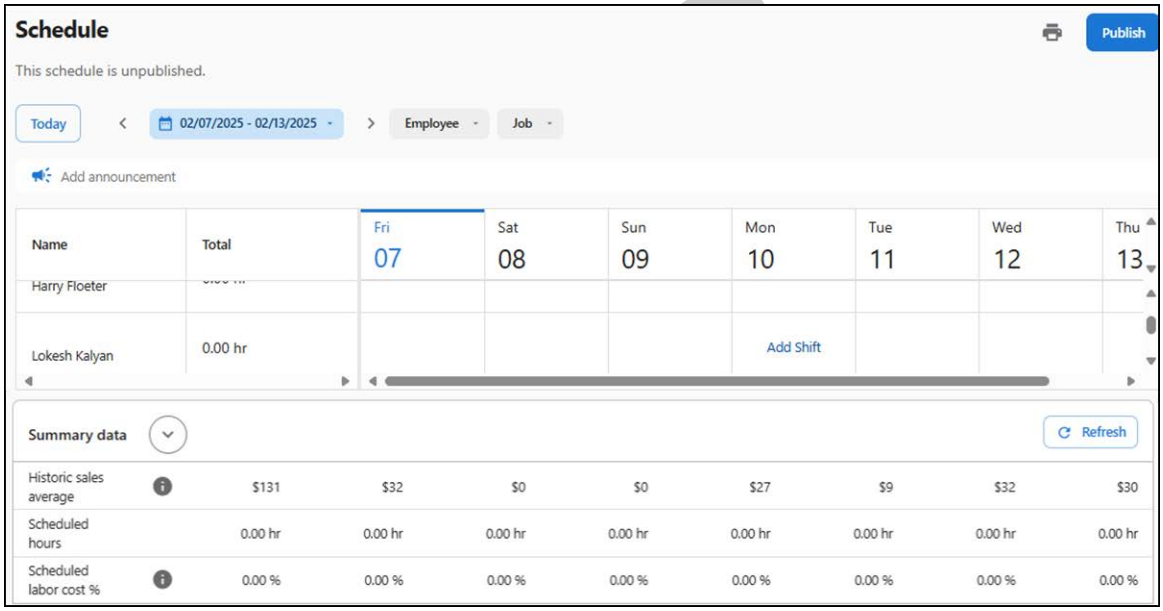
Working with schedules

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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: • **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 *Review the employee for the following: Part-time critical* 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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Selecting a schedule week

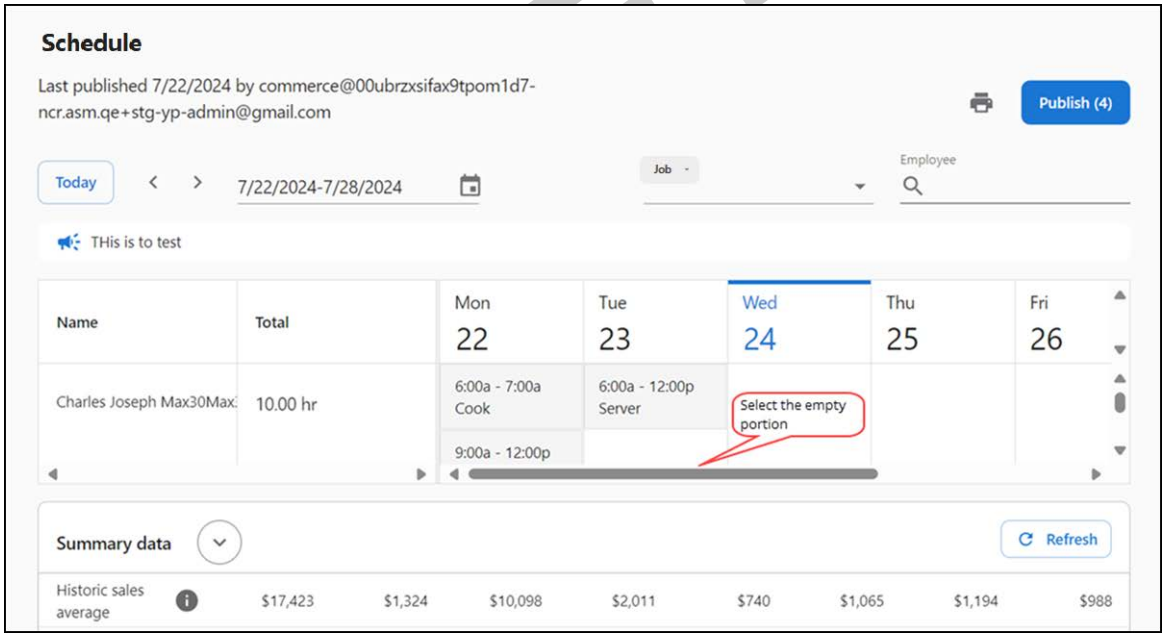
The schedule includes the employee schedule data, so the manager knows who is working on each shift, what time they enter and leave and where in the restaurant they will be working.

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' 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.

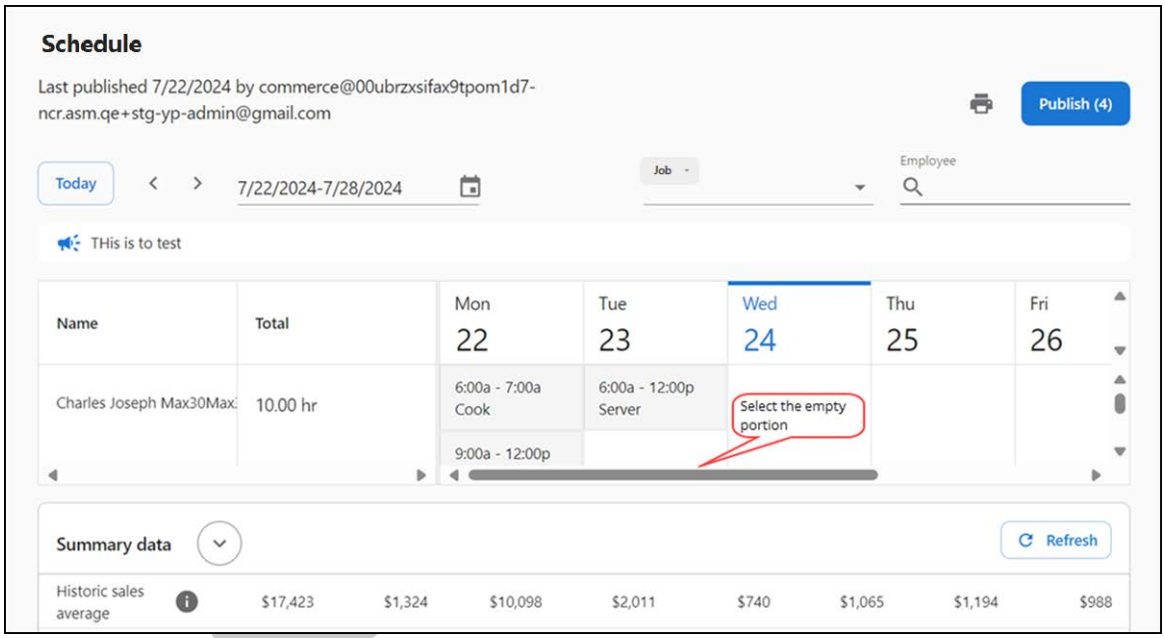
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

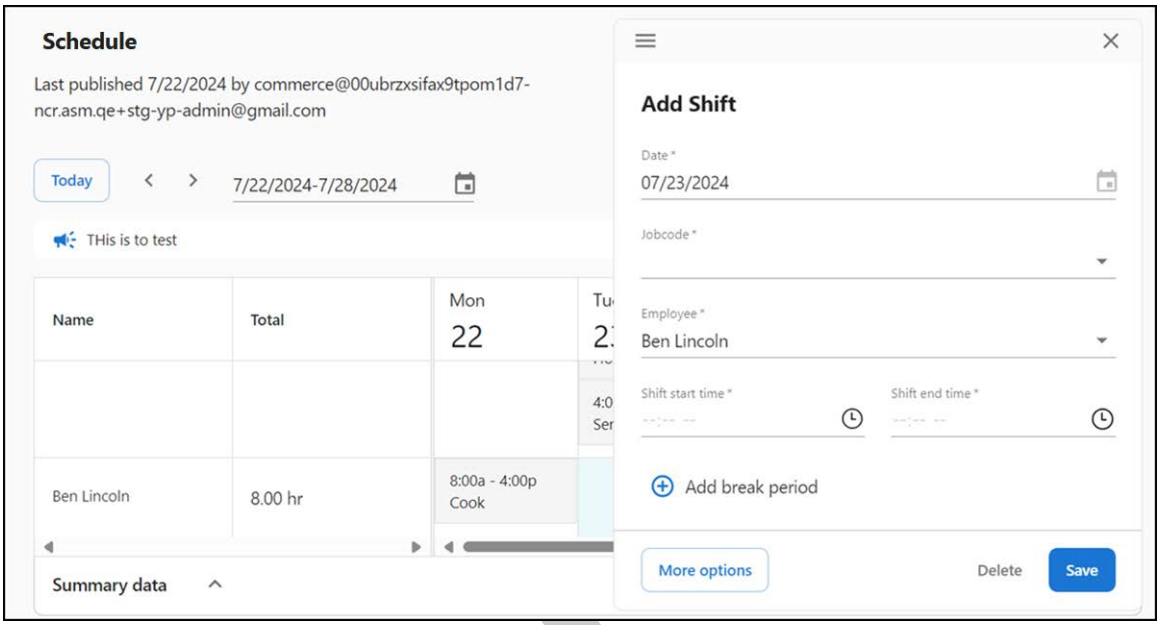


'Schedule' screen

DRAFT

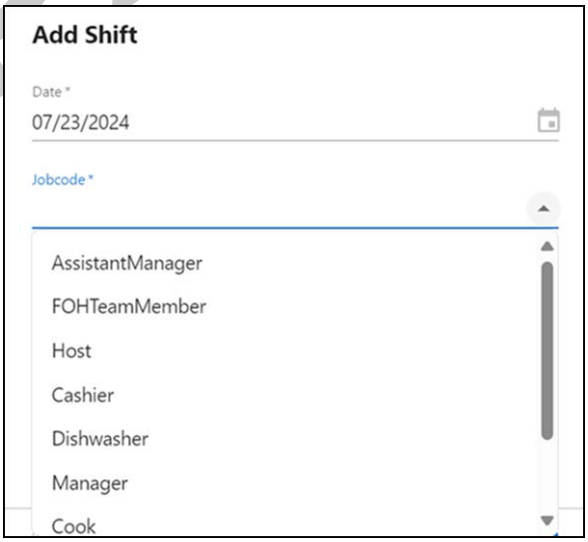
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



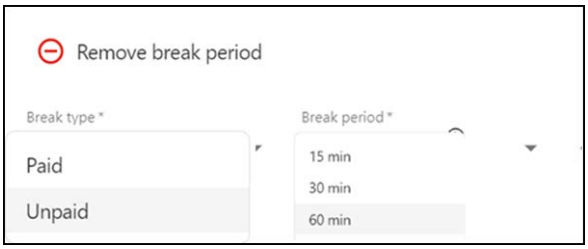
Job selection

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

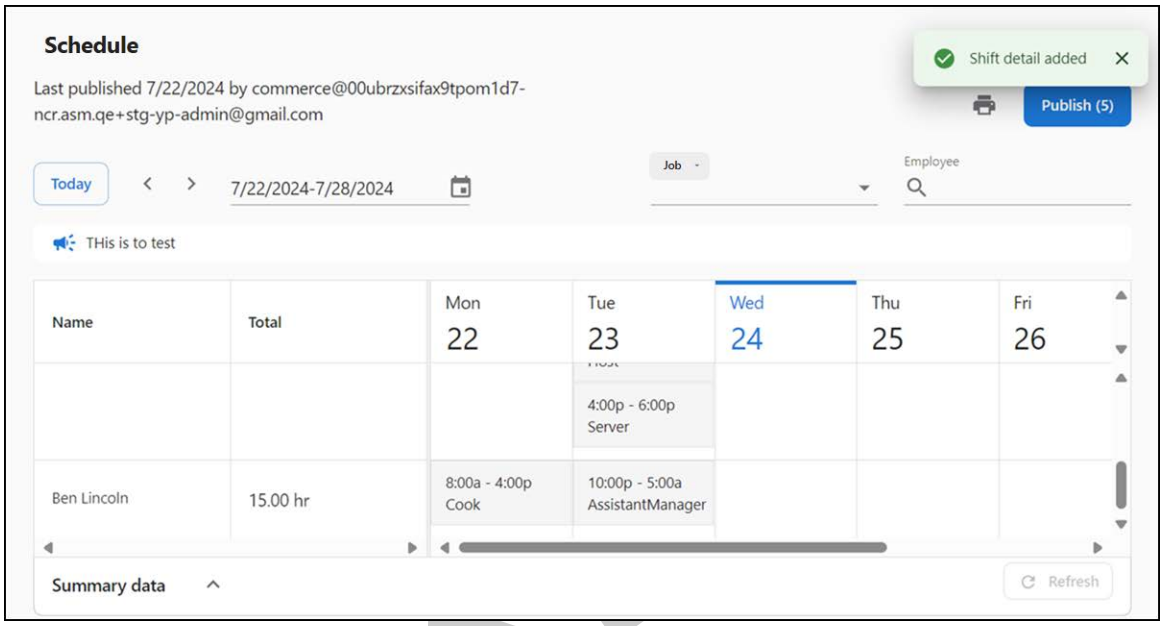
7. Select the **duration of minutes** for which the employee is allowed to take a break. The predefined break periods are 15, 30, and 60 (in minutes).
8. Enter the **start time** and **end time** for the break using 15 minute intervals (00,15, 30, 45).
9. If you need to add additional breaks, repeat **steps 5 through 8**.

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



Success message

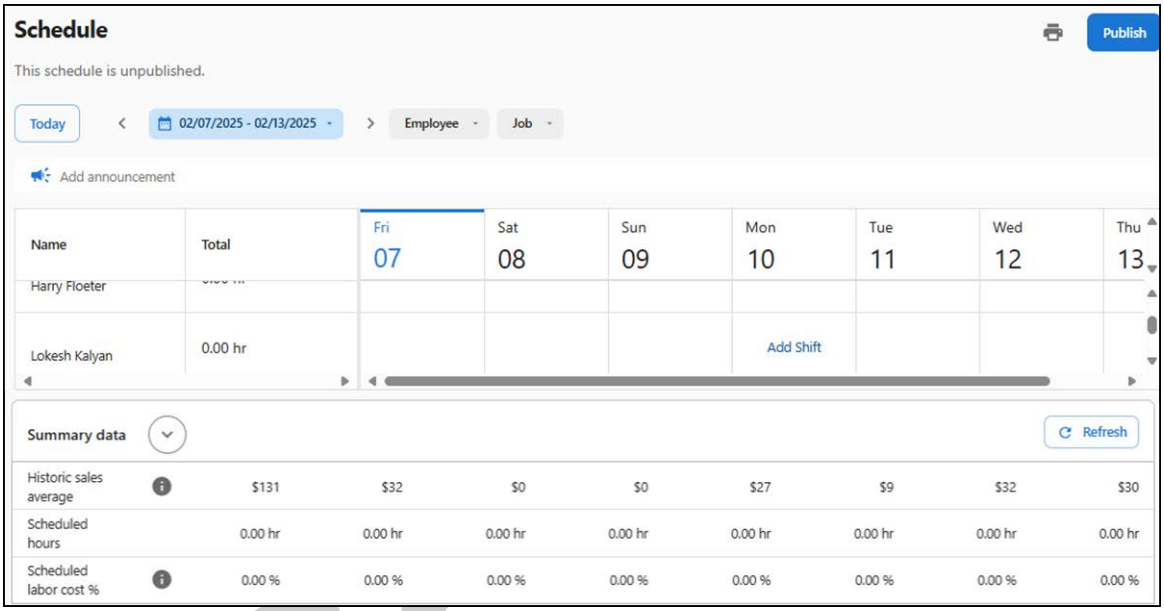
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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' 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**.

DRAFT

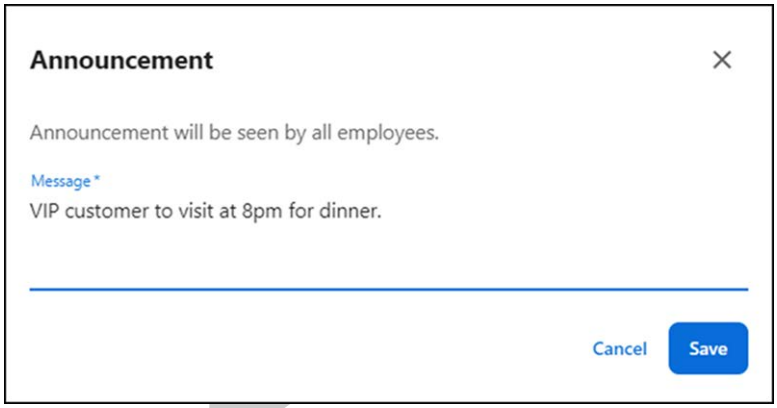
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRA

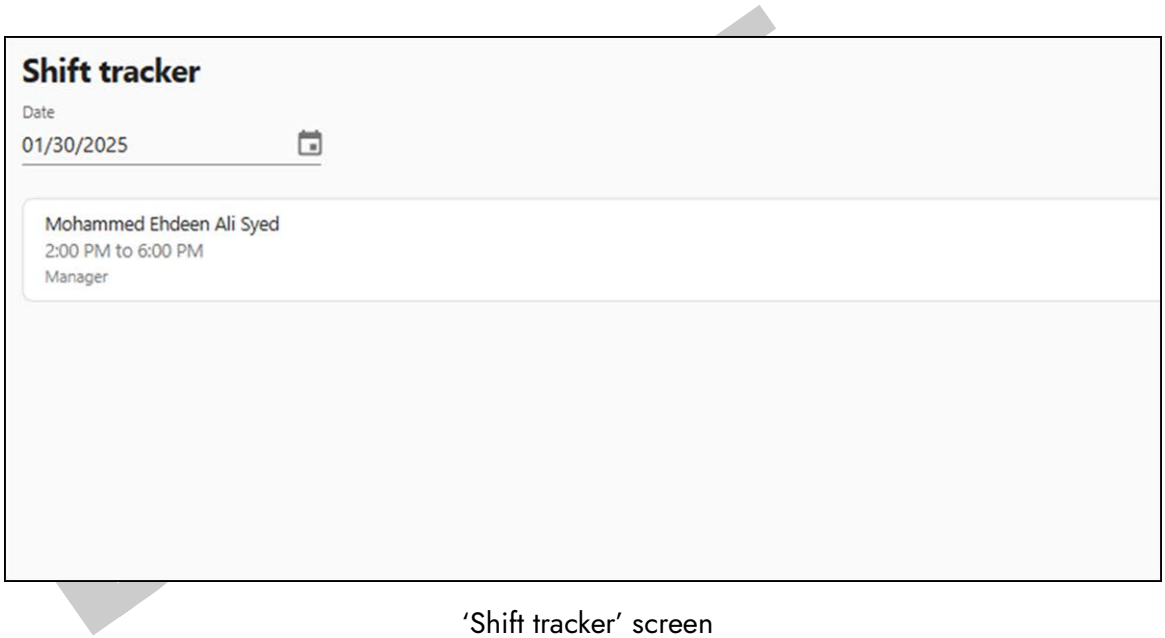
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

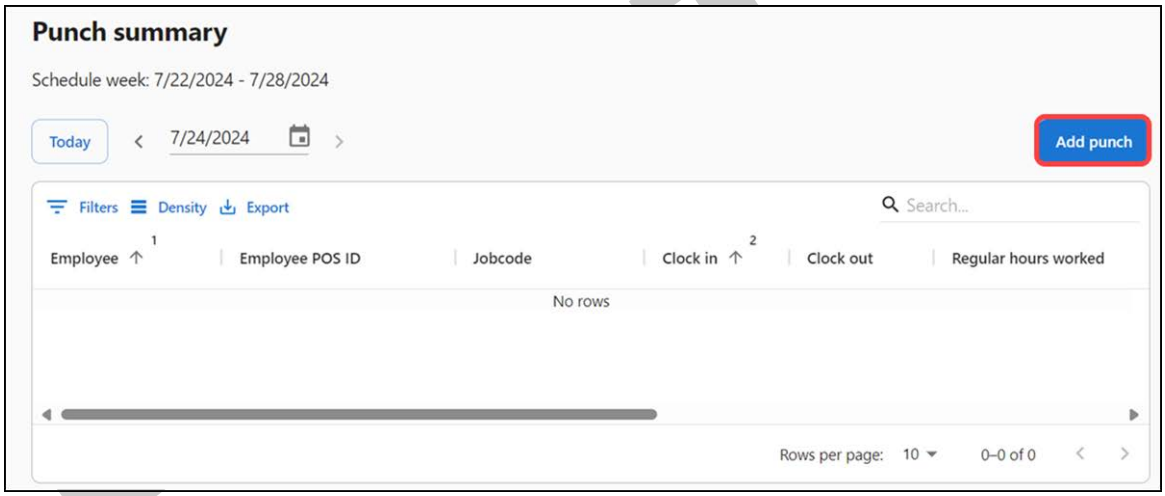
Working with punches

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:

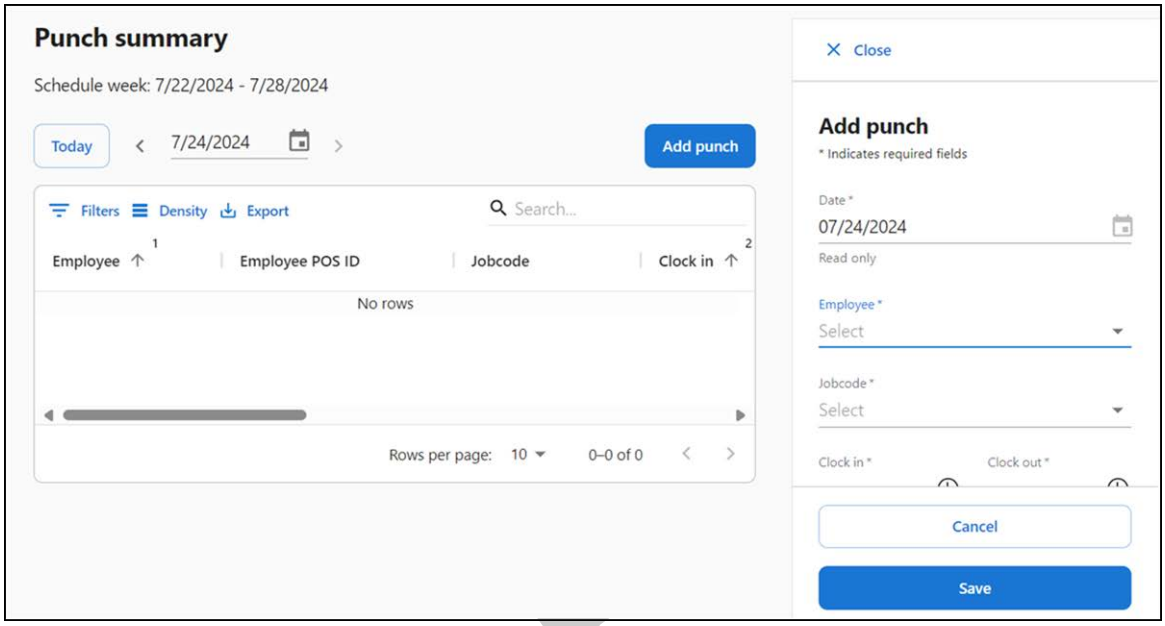
1. Select **Labor** > **Punch summary**. The 'Punch summary' screen appears.



'Punch summary' screen

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



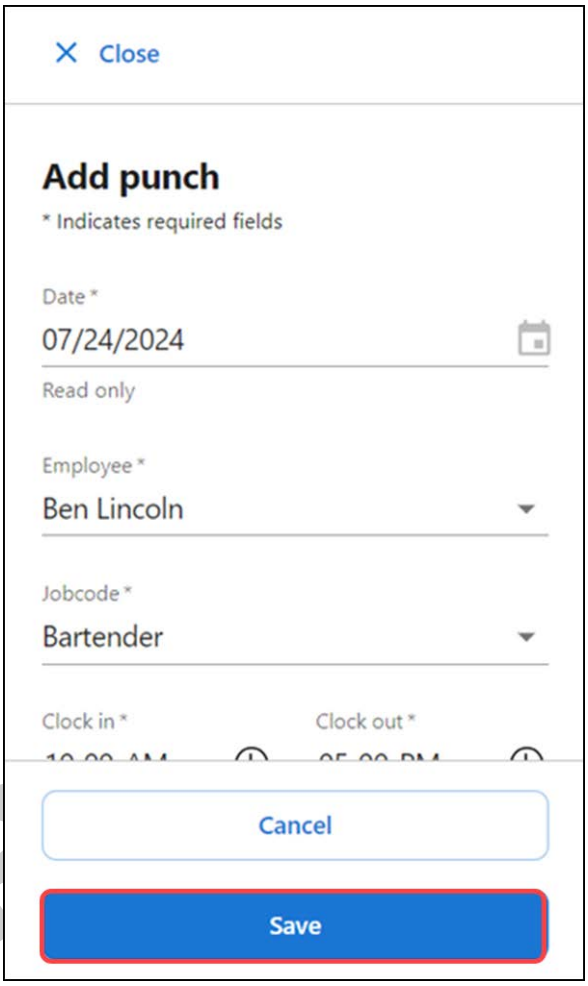
'Add punch' screen

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

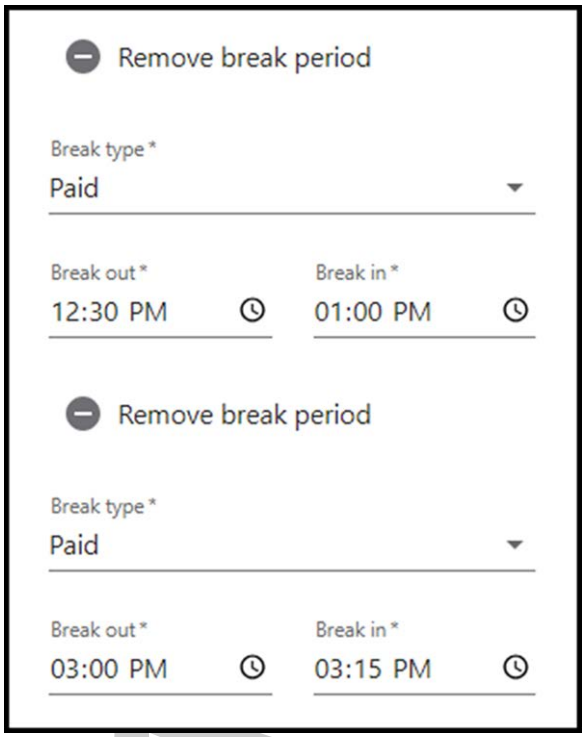


'Add punch' screen

DR

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



Break section

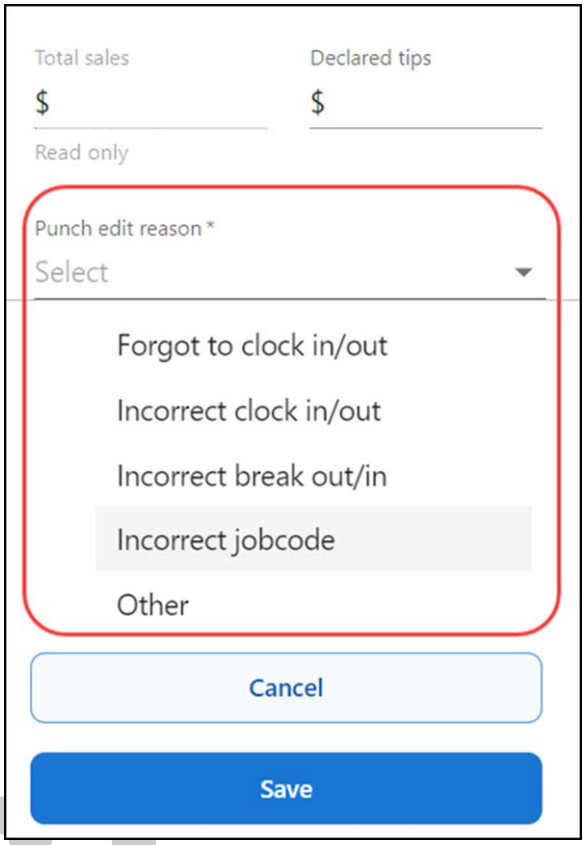
Break type — Select the type of break the employee took. Select from paid and unpaid.

Break out — Select the time when the break started.

Break in — Select the time when the break ended.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions



Tip declaration and Punch reason selection

8. 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.

9. 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.

10. 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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

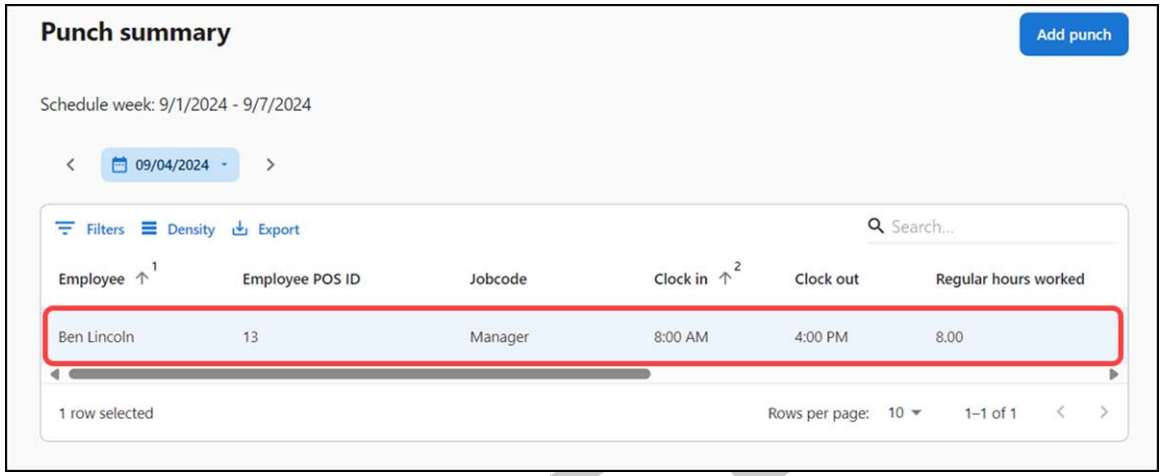
Modified by — Employee who modified the punch details.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

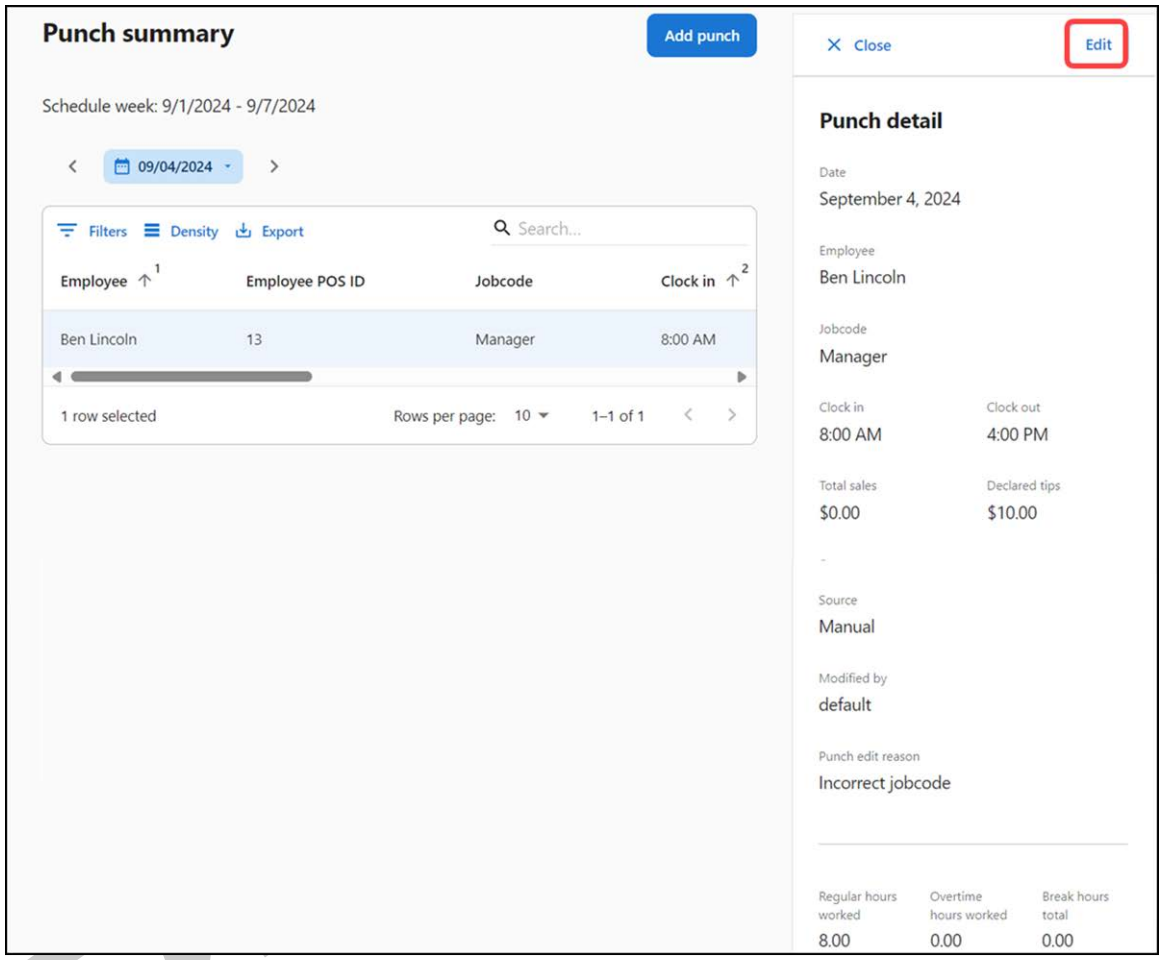


'Punch summary' screen

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



'Punch detail' screen

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

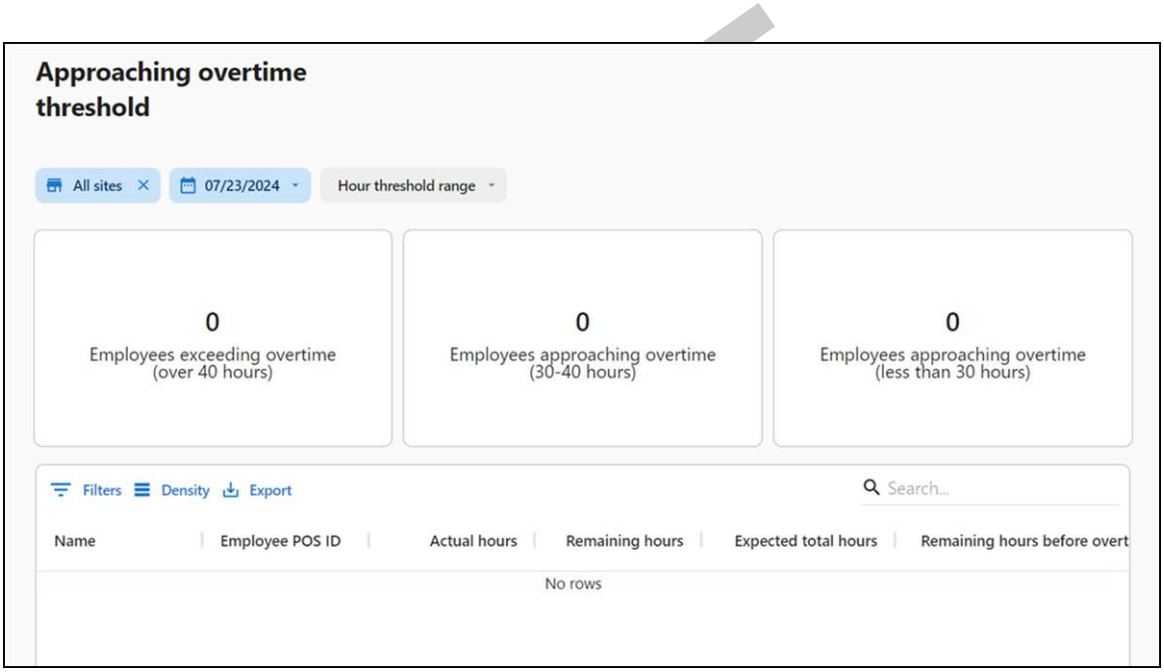
Working with reports

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.

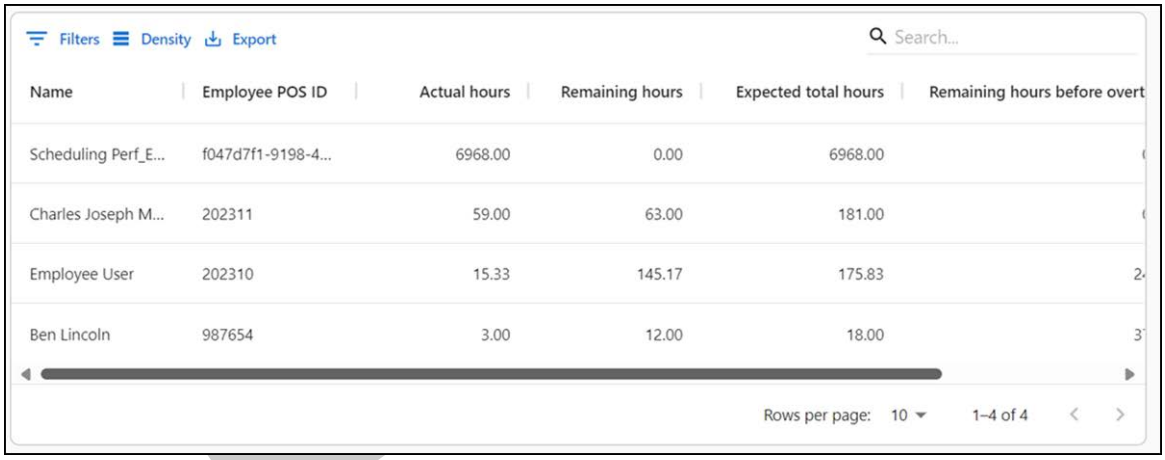
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

'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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Working with raw items

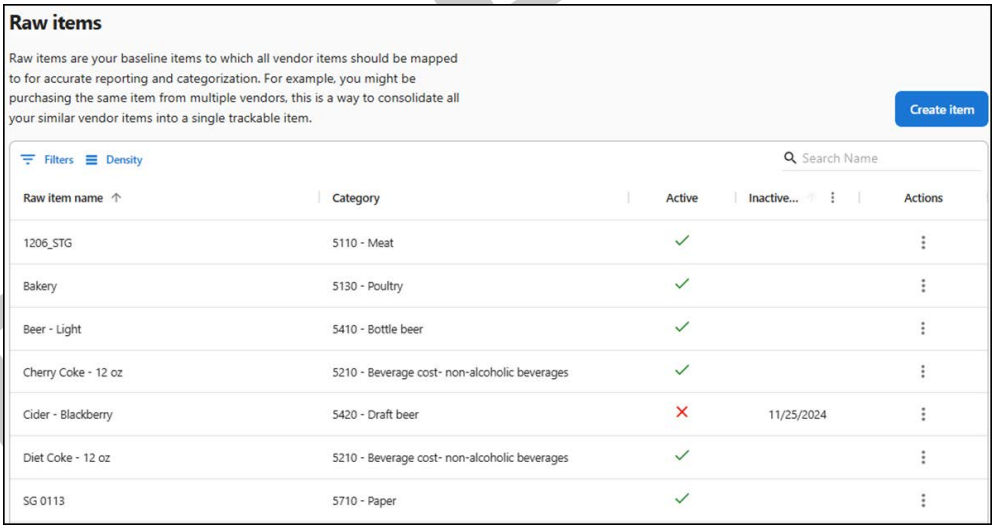
A raw items, also referred to as raw material, are your baseline items, such as the ingredients needed to prepare a finished product for sale to your consumers. Common examples include sugar, salt, chicken, beef, bread, tomatoes, onions, and much more.

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:

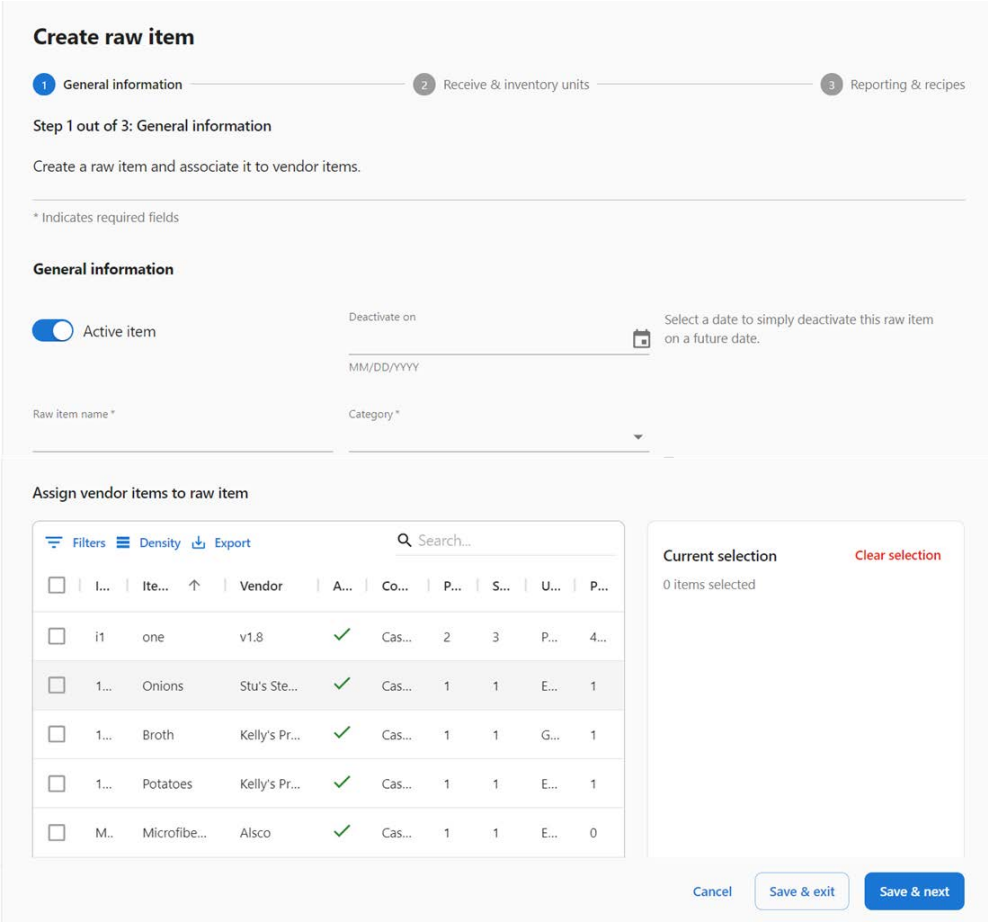
1. Select **Inventory** > **Raw items**. The 'Raw items' screen appears.



'Raw items' screen

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



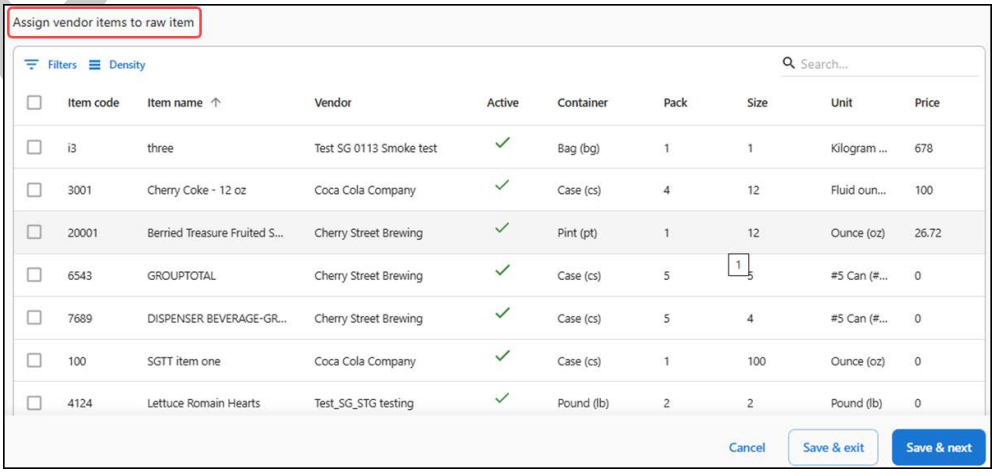
'Create raw item' screen

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



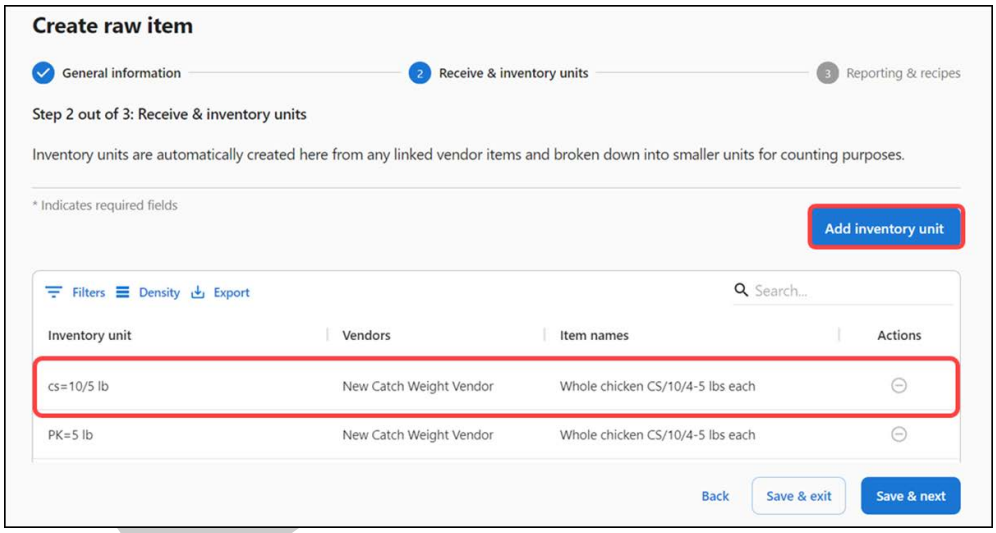
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

7. 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.

8. 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.



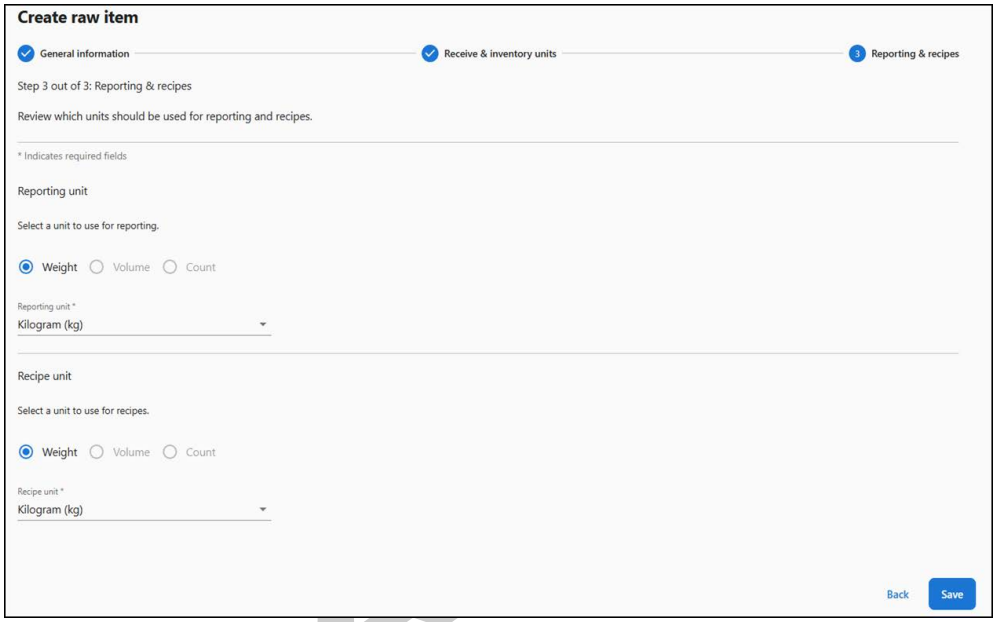
'Receive & inventory units' step

9. 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.

'Add new inventory unit' screen

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



'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.

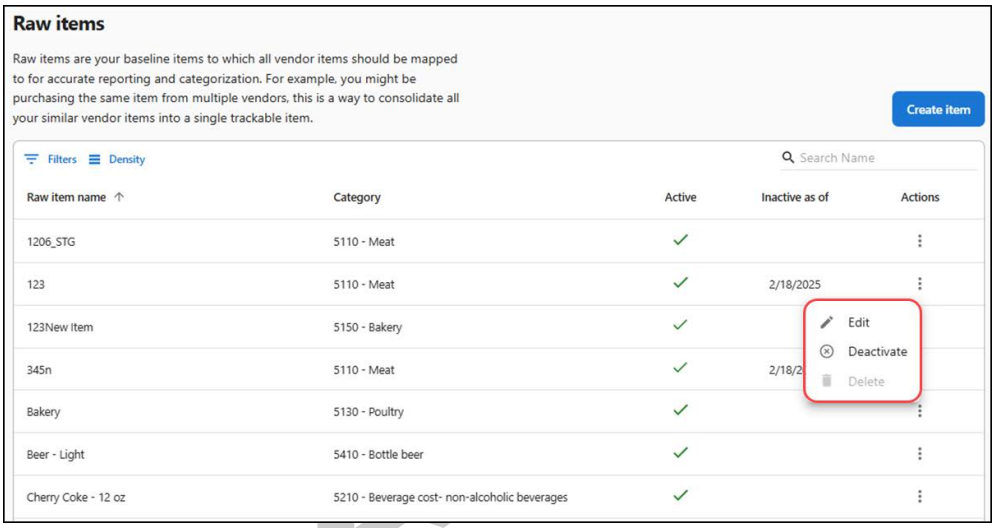
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To edit a raw item:

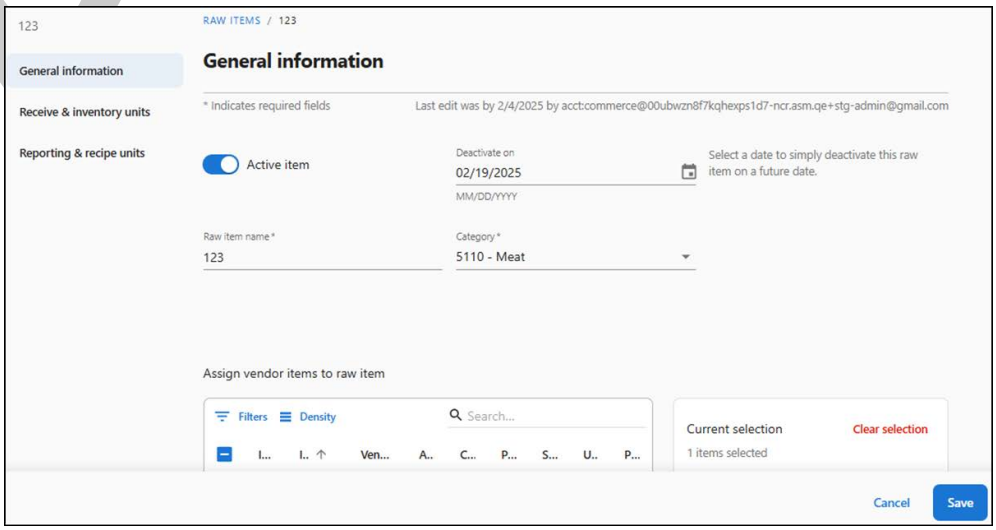
When you edit an existing raw item, the defined steps that appear at the top of the screen during the creation process are moved to the left side of the screen as tabs for ease of use; however, the information between the two experiences is identical. During the editing process, you can access the tabs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

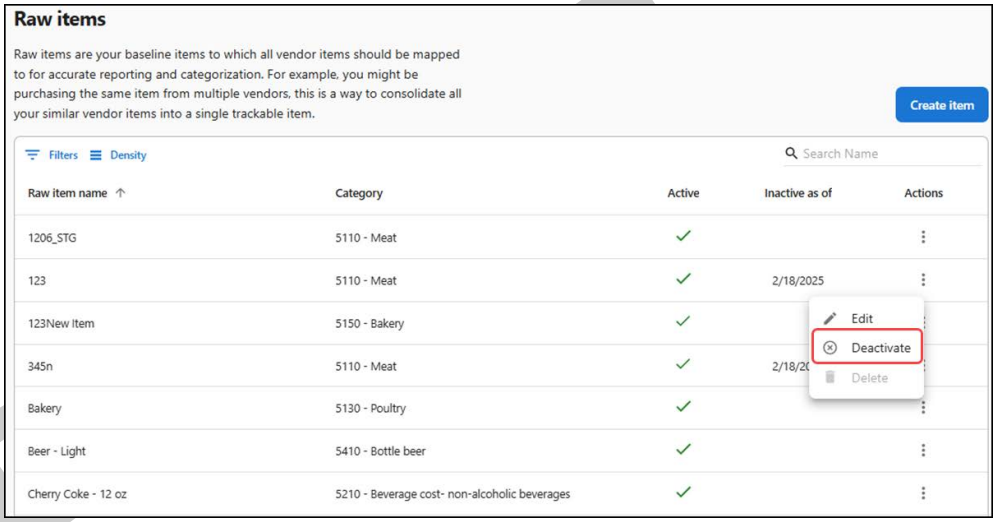
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

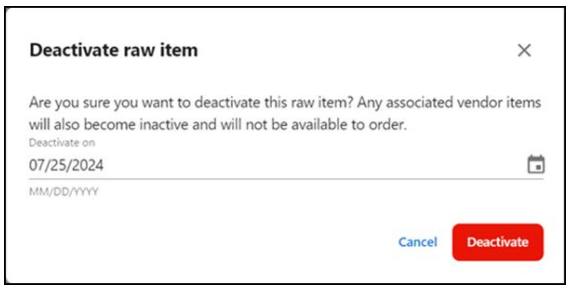
1. Select **Inventory** > Raw items. The 'Raw items' screen appears.



Deactivate raw items

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



'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.

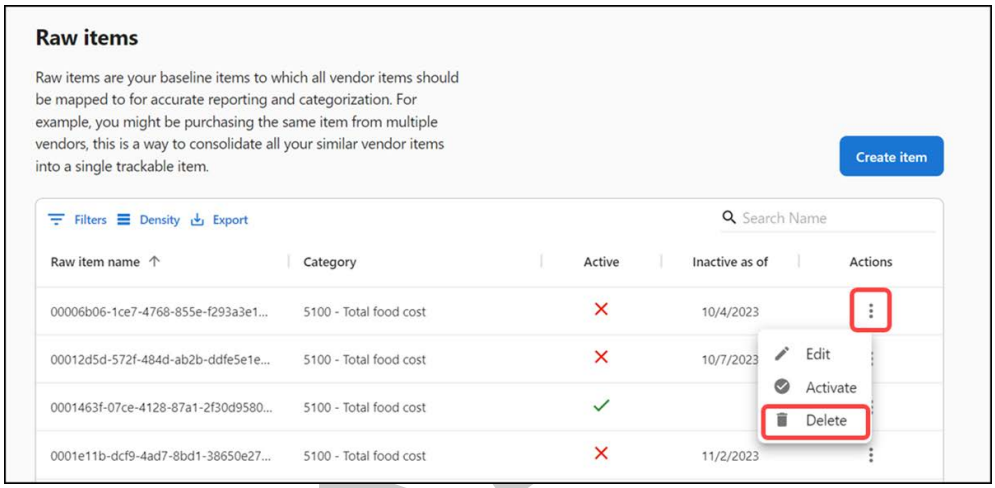
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To delete a raw item:

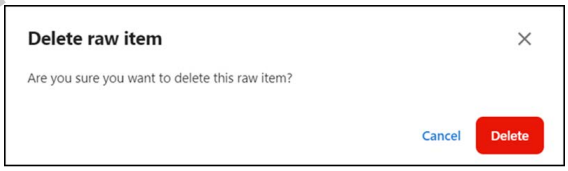
> **Note**
> You are not allowed to delete a raw item when it is linked to a vendor item.

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

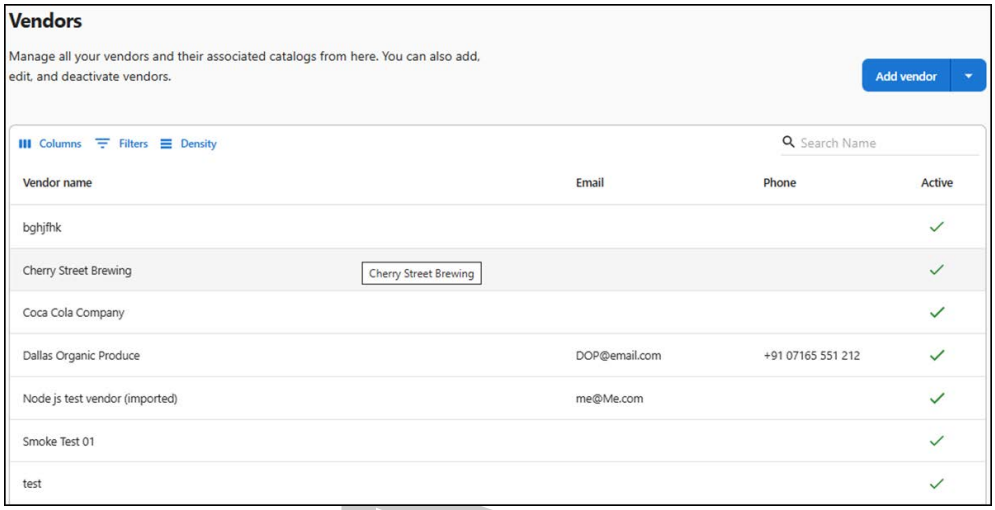
3. Click **Delete** to confirm the deletion of the raw item, or click **Cancel** to return to the 'Raw items' screen.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



Adding vendor

Reference

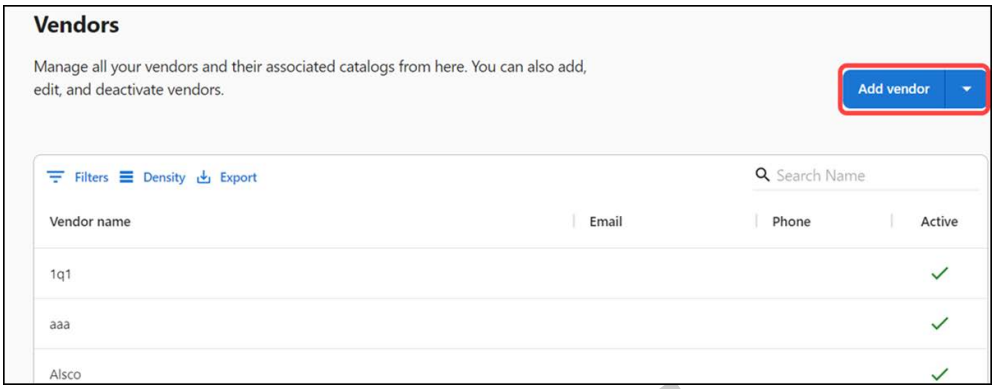
For information on using a .CSV file to upload vendors in bulk, refer to page 169.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

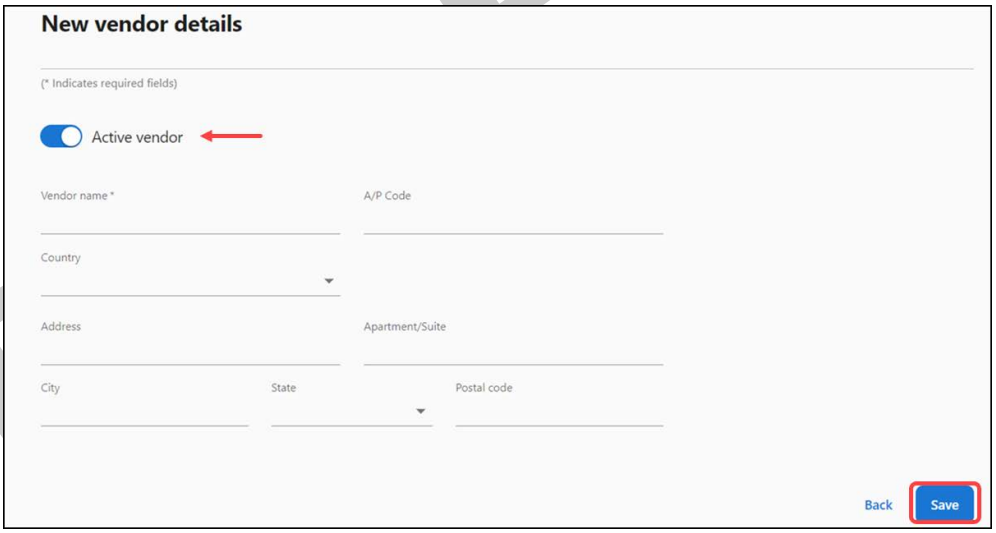
To add a vendor manually:

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



'Vendors' screen

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

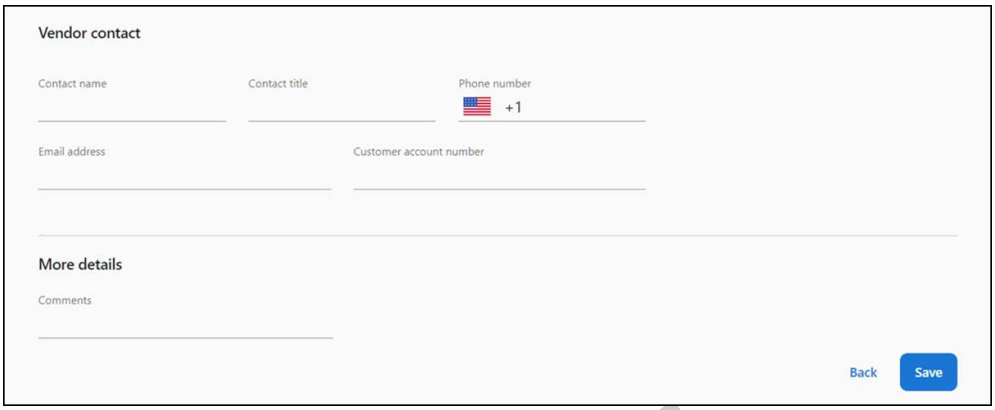


'New vendor details' screen

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.'

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



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.

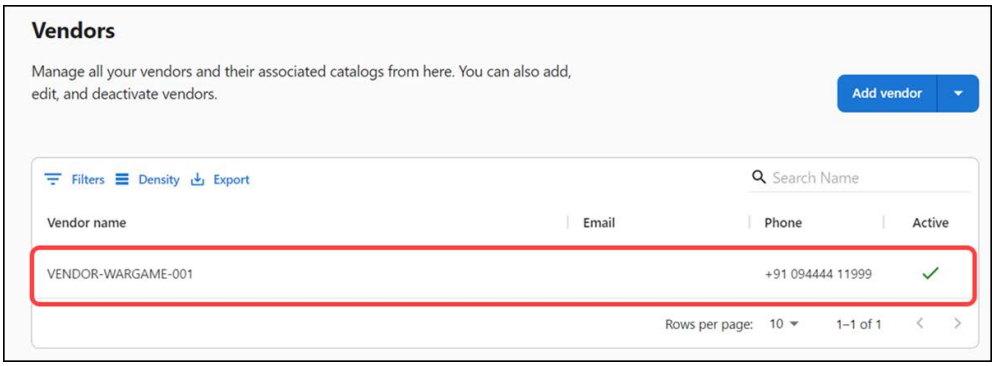
    Once you add a vendor, you must assign vendor items to the vendor. Refer to Working with vendor items on page 88.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

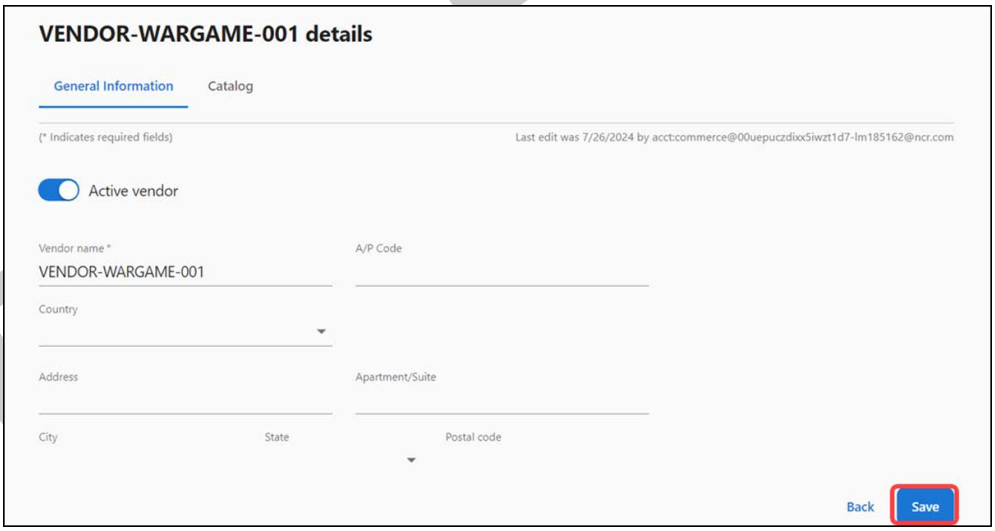
To edit a vendor:

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

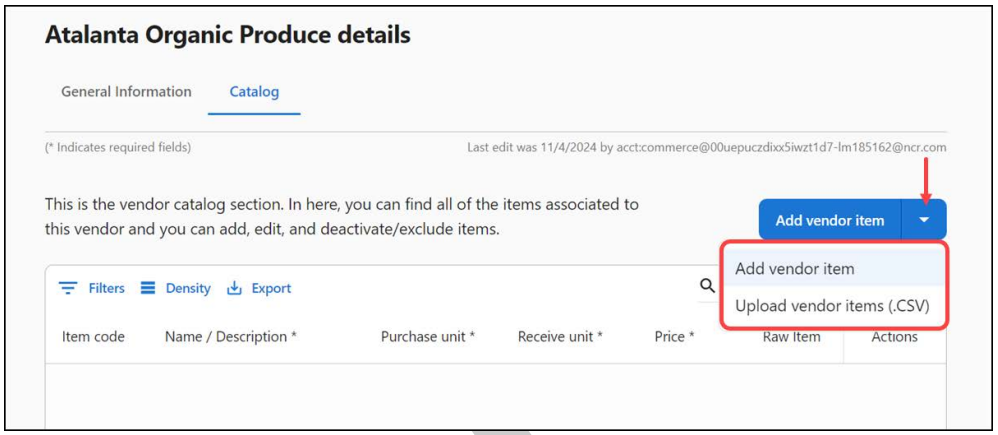
3. Make the **necessary changes** to the vendor.
4. Click **Save** to save the changes or click **Back** to discard your changes and return to the 'Vendors' screen.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

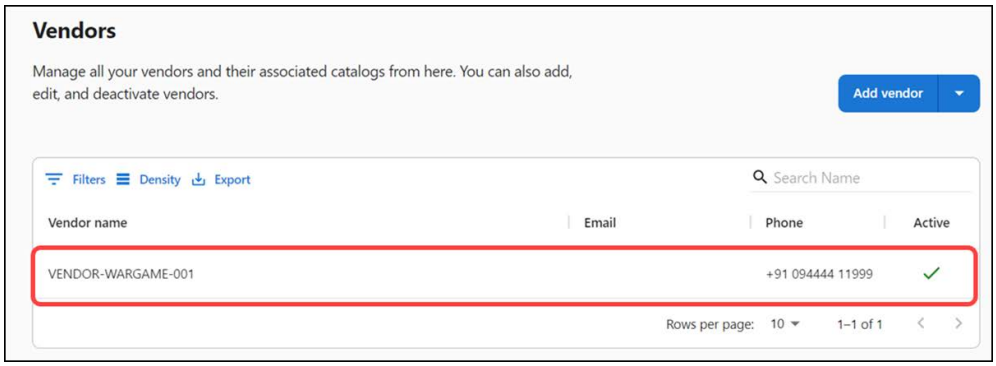
Reference
For information on using a .CSV file to upload vendor items in bulk, refer to page 173.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

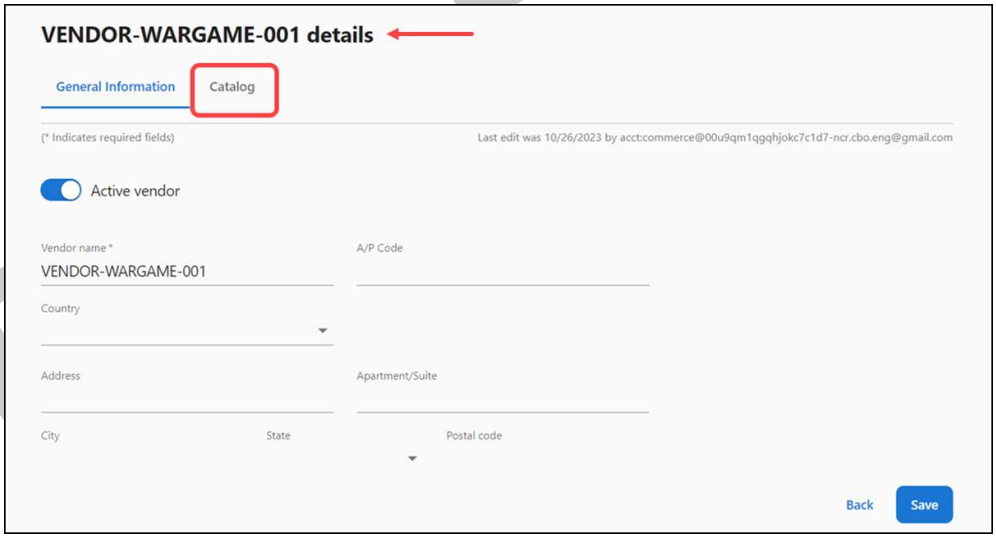
To manually add a vendor item:

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



Vendor selection

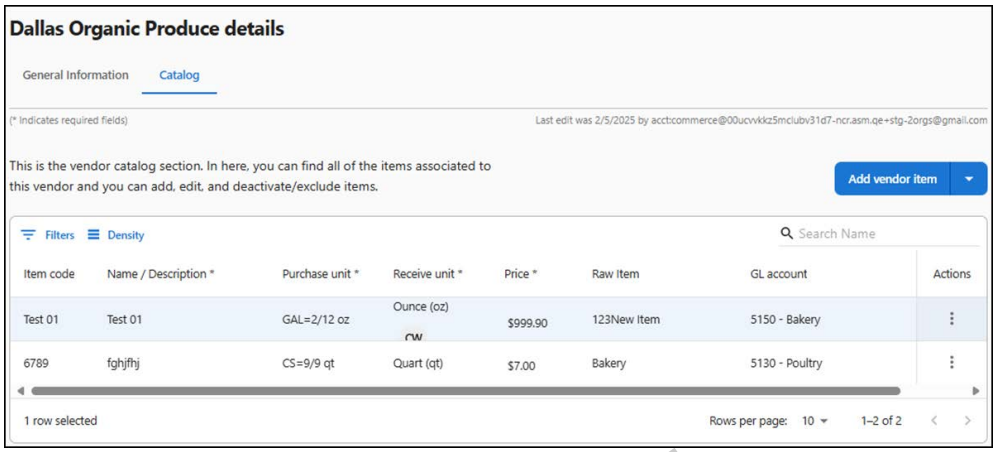
2. Select the **vendor** that sells or owns the item. The vendor details appear with the 'General information' tab as the active tab.



'General information' tab

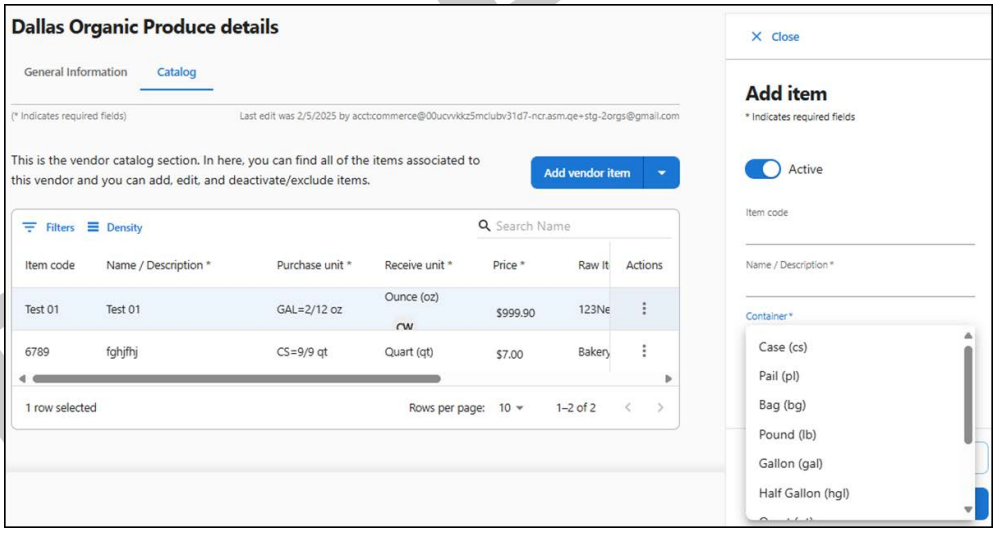
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

3. Select the **Catalog** tab.



'Catalog' tab

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

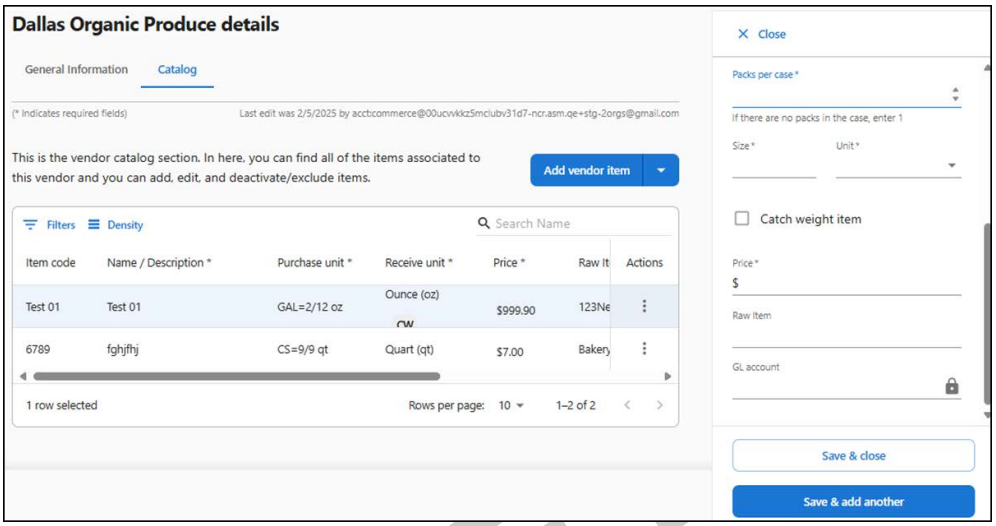


'Add item' screen

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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).



'Add vendor item' Catalog tab

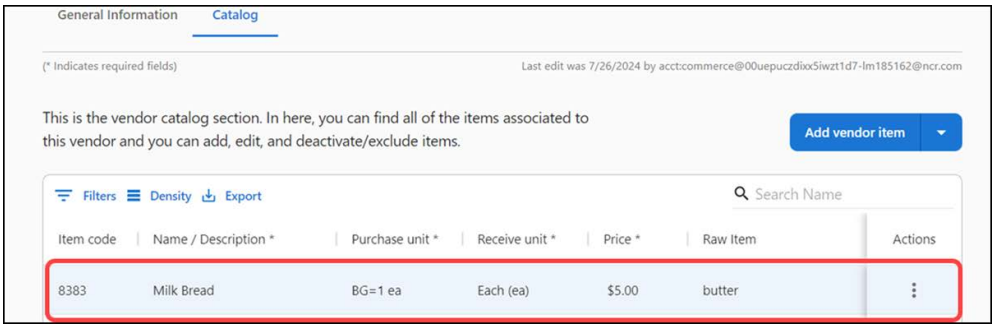
8. Type the **total quantity of packs** in the vendor item container. This must be a numeric value from 1-999, up to two decimals.
9. Type the **actual size of each unit** in the package. This must be a numeric value from 1 to 999, up to two decimals.
10. Select the **standard unit of measurement** of 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-

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

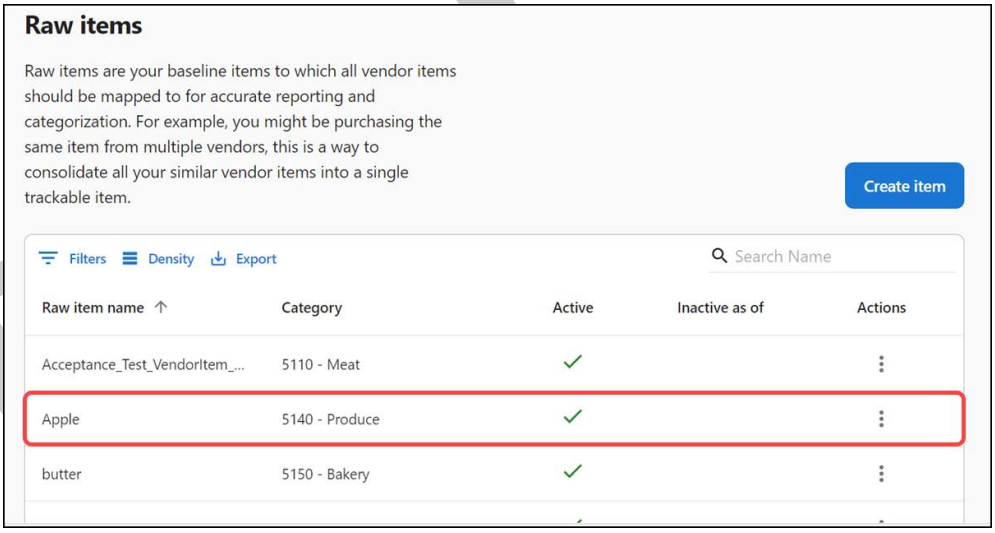


Manually added vendor item

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.

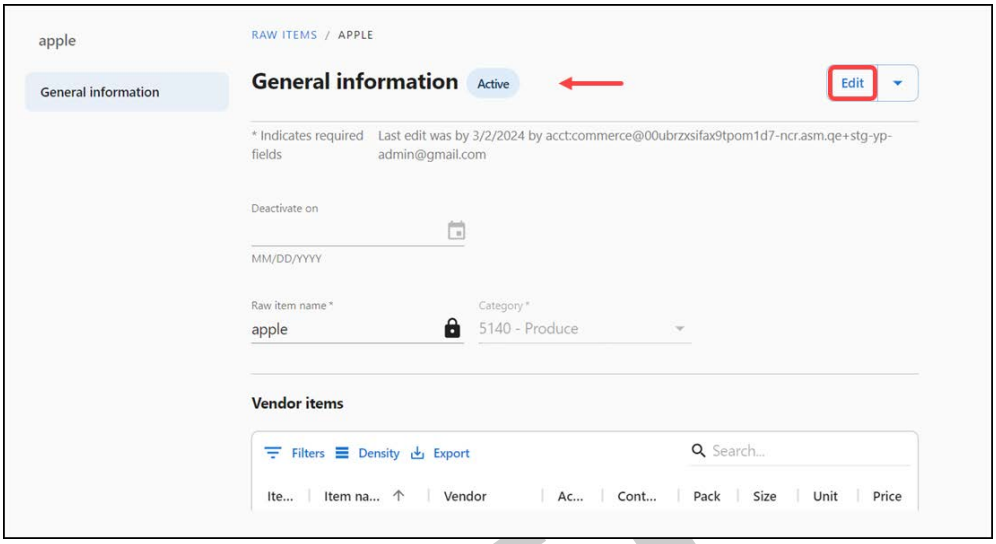


'Raw items' screen

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

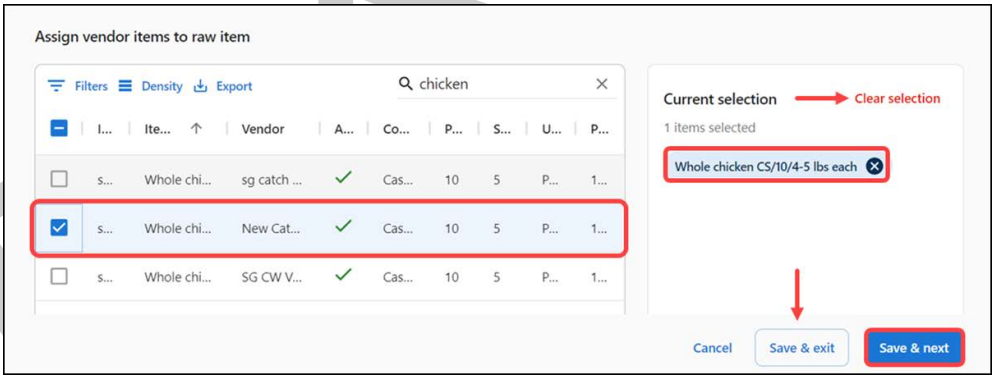
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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**.

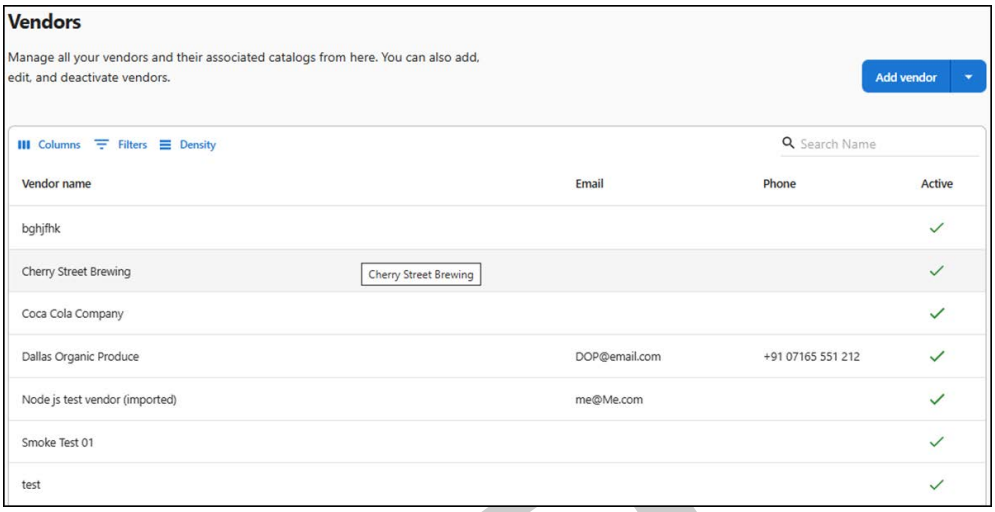
   -OR-

   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**.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To edit a vendor item:

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



Vendor selection

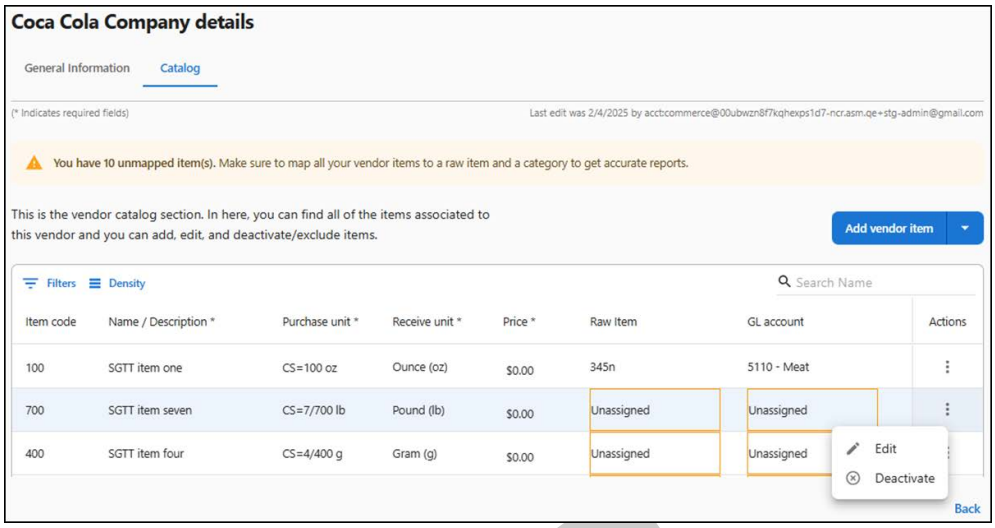
2. Select the **vendor** that sells the item. The vendor details appear with the 'General information' tab as the active tab.

'General information' tab

DRAFT

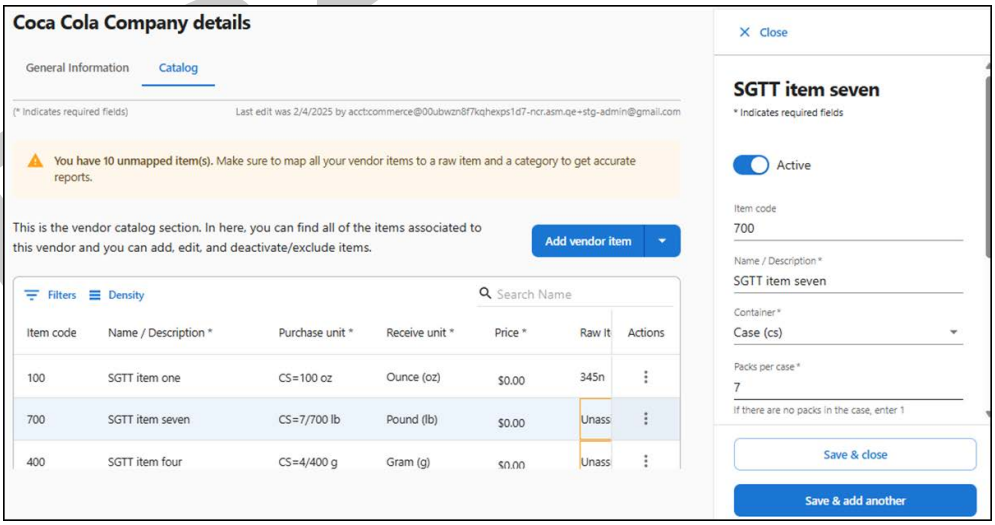
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

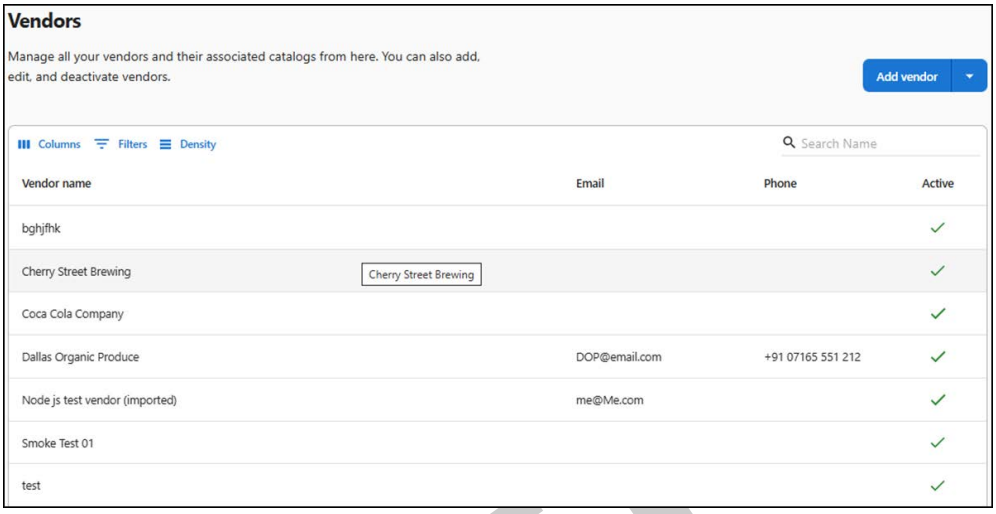
6. Click **Save & close** to save the changes and close the vendor item edit window, or click **Save & add another** to save the edits and add another vendor item.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To deactivate a vendor item:

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



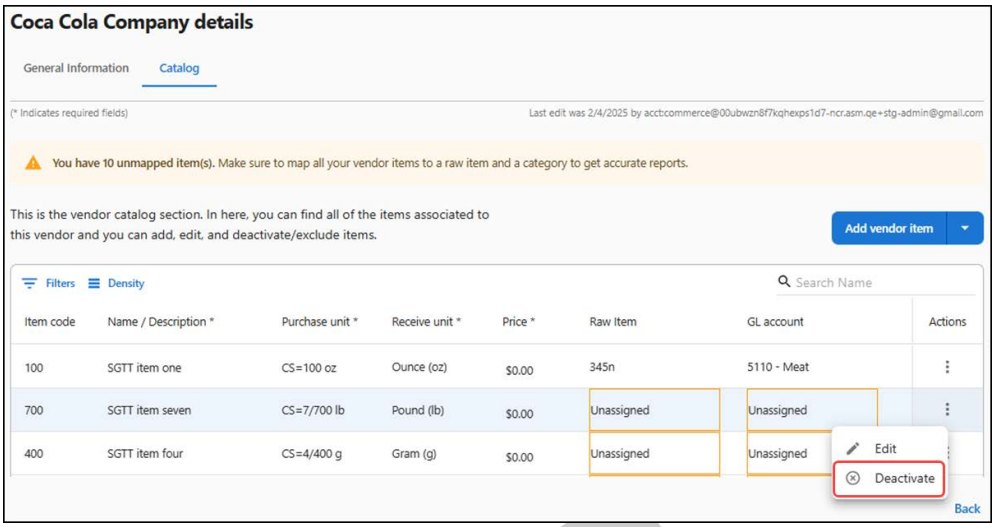
Vendor selection

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

'General information' tab

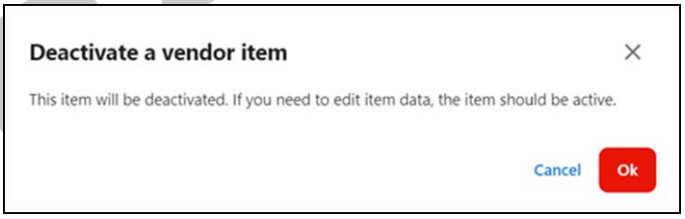
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

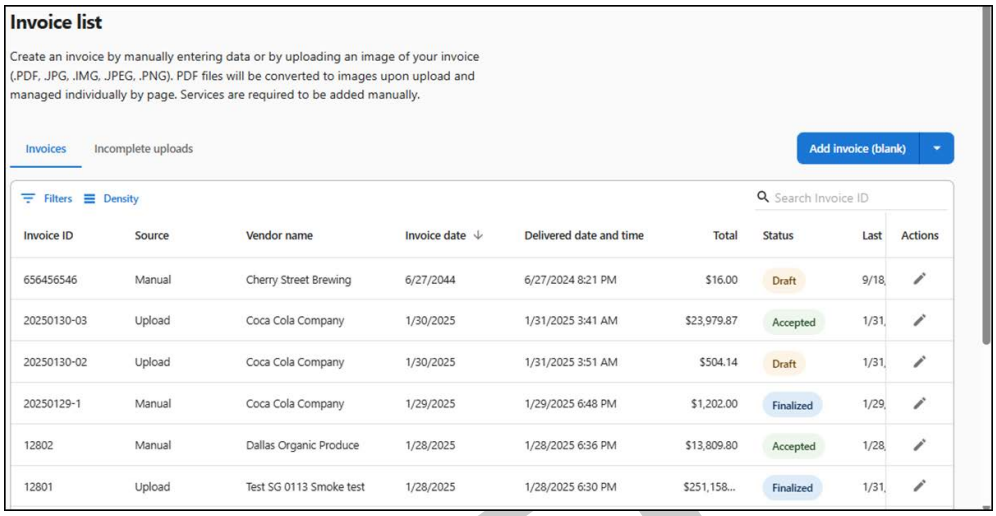
An employee or mid-level manager manually adds the invoice in ASM, which is then approved and finalized by the restaurant manager.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To manually add an invoice:

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

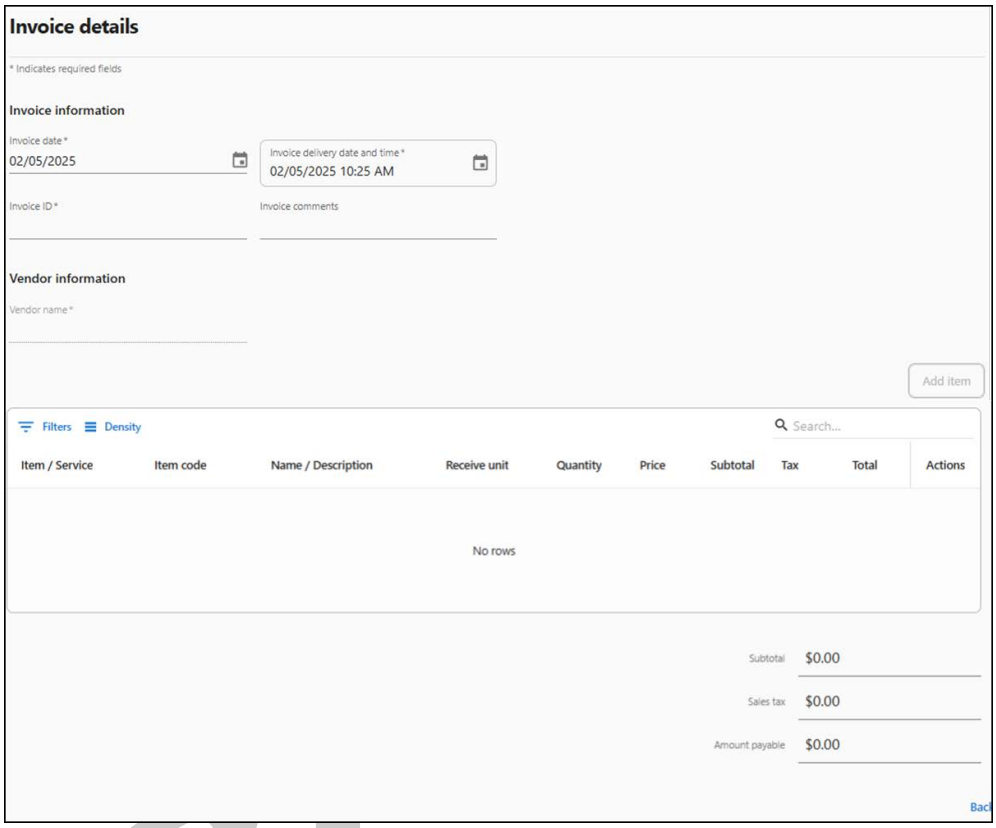


'Invoice list' screen

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



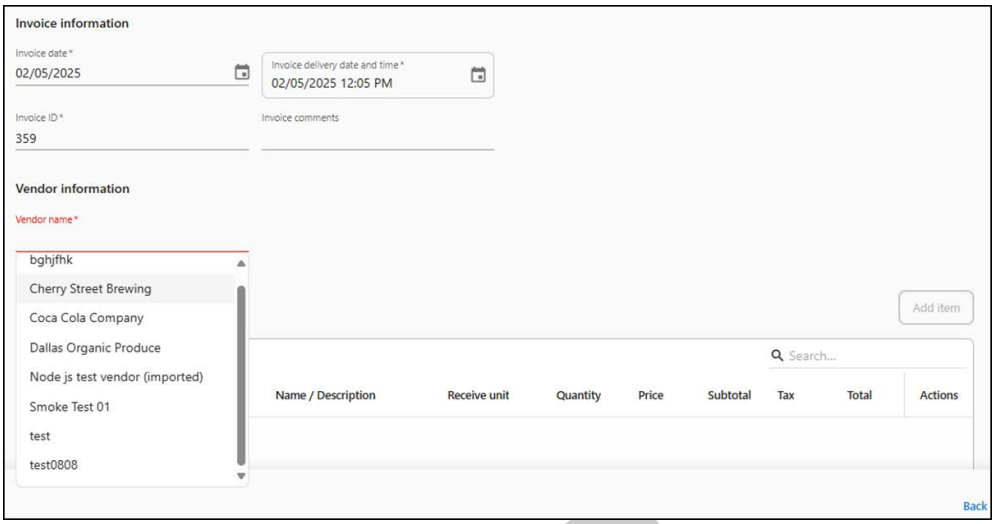
'Invoice details' screen

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

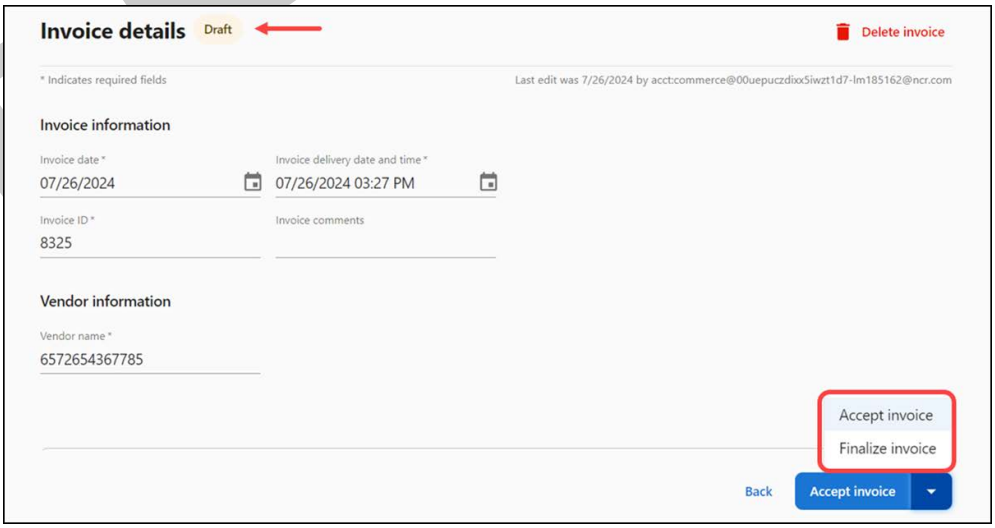
6. Type any **additional information** about the invoice in 'Invoice comments.'



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.

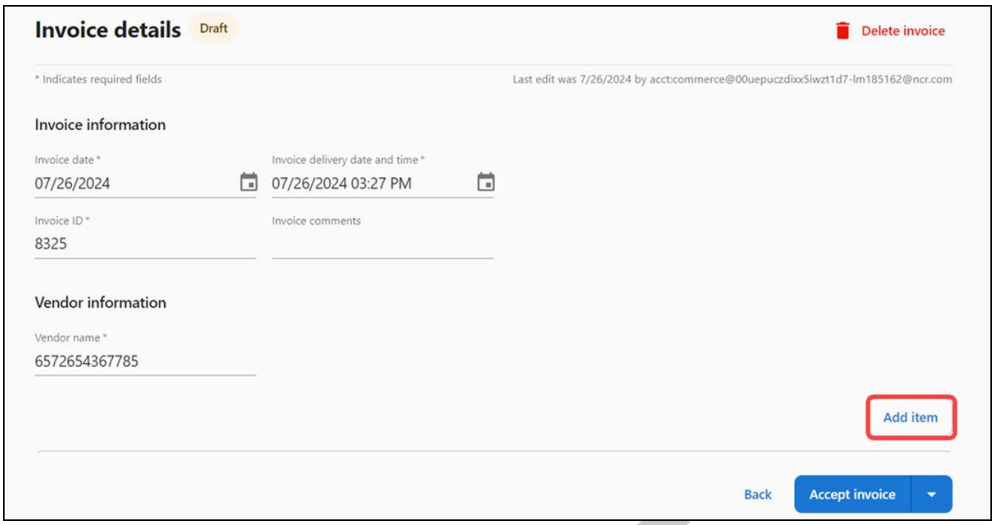
   The invoice status is set to Draft and the options to 'Accept invoice' and 'Finalize invoice' appear.



Invoice record saved as Draft

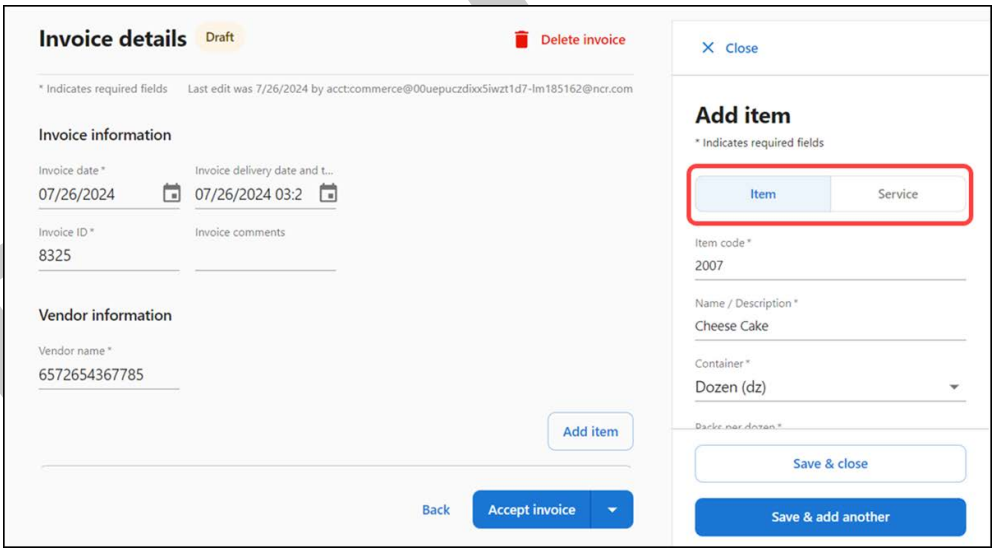
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions



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.



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:

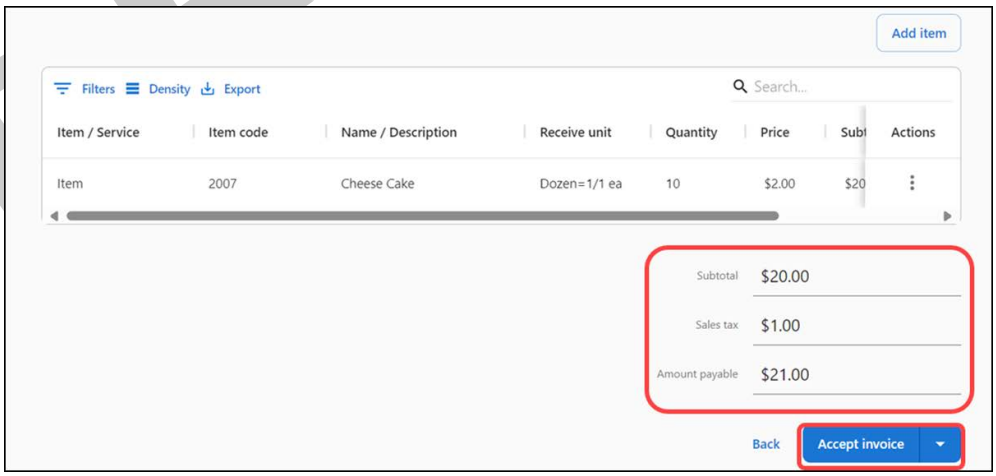
    Item — Indicates the item is a product purchased from the vendor, such as egg or milk.

    Service — **Indi**cates 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.

NCR VOYIX
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

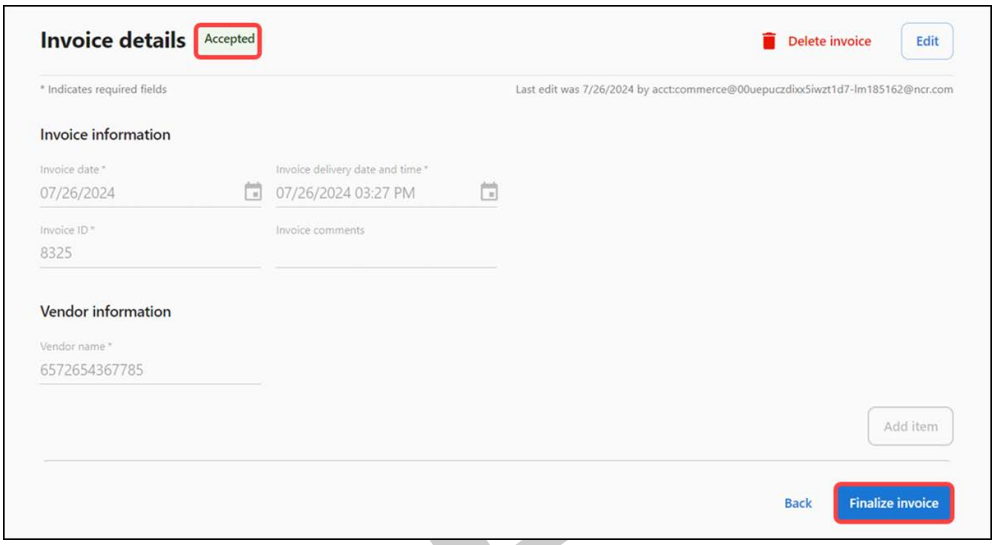


Added invoice items and services

DRAFT

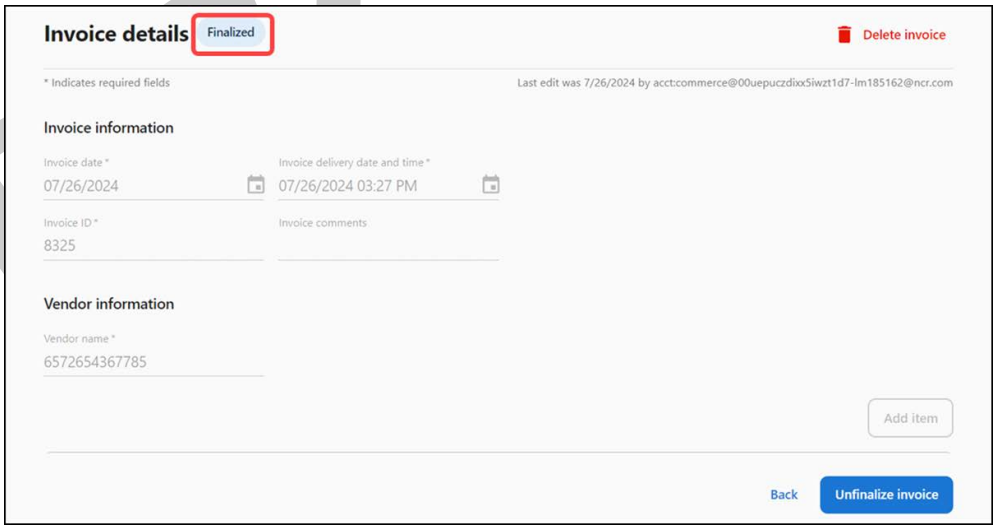
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



Accepted invoice

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



Finalized invoice

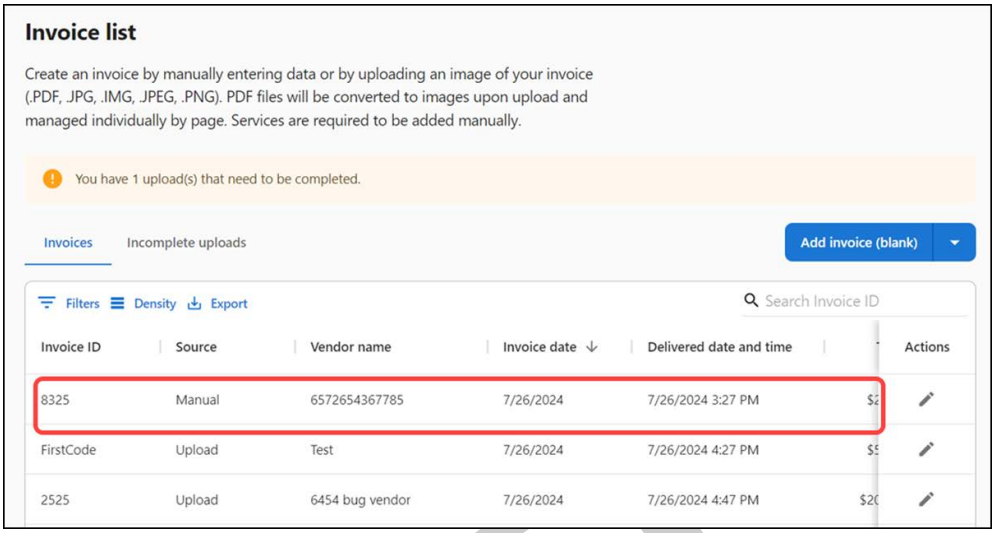
Note
Click 'Unfinalize invoice' to revert the finalized invoice status to Draft.

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

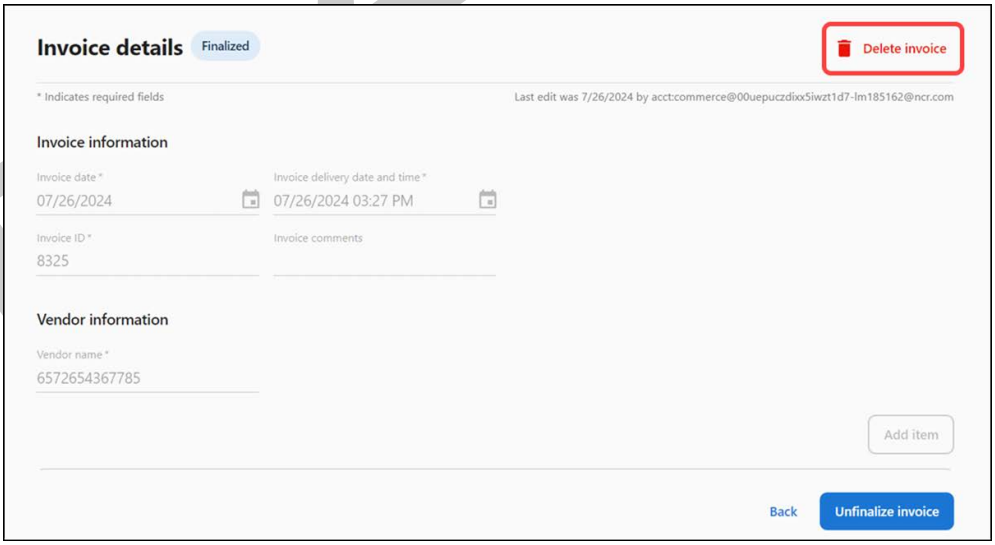
Deleting an invoice

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.

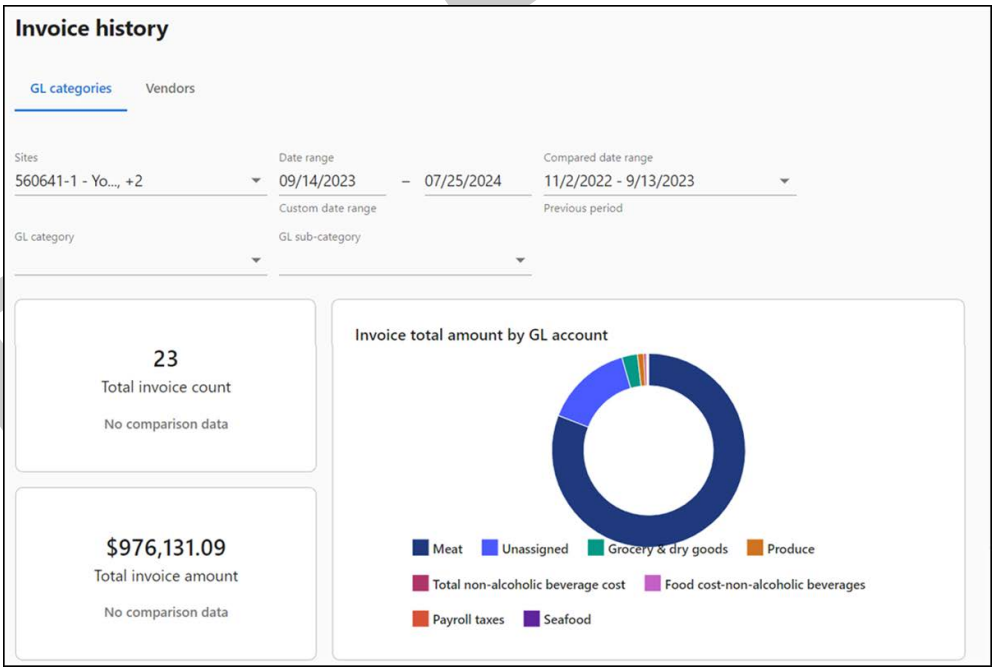
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

- **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).

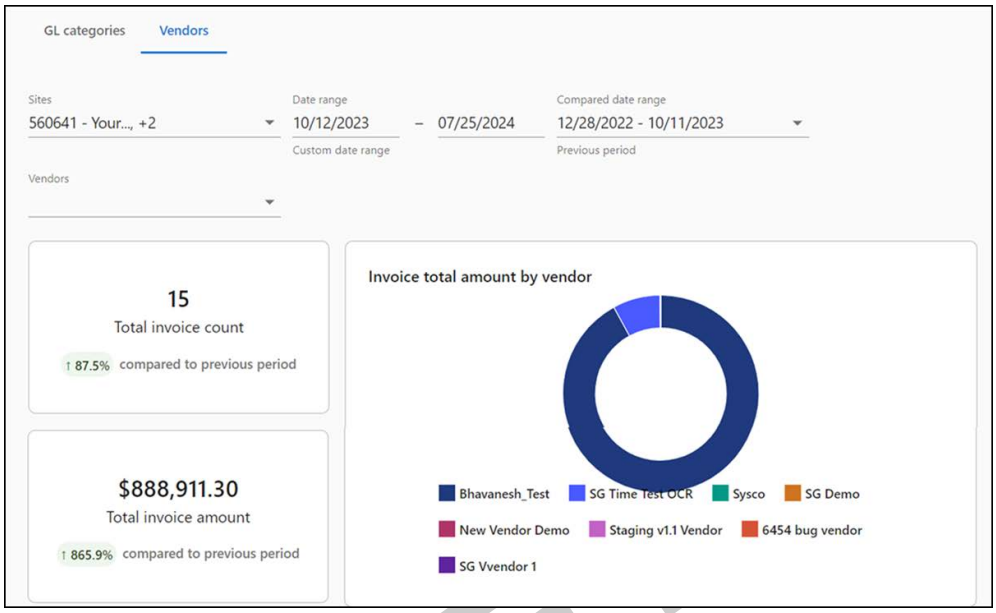
To run an 'Invoice history report' of Vendors:

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**.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

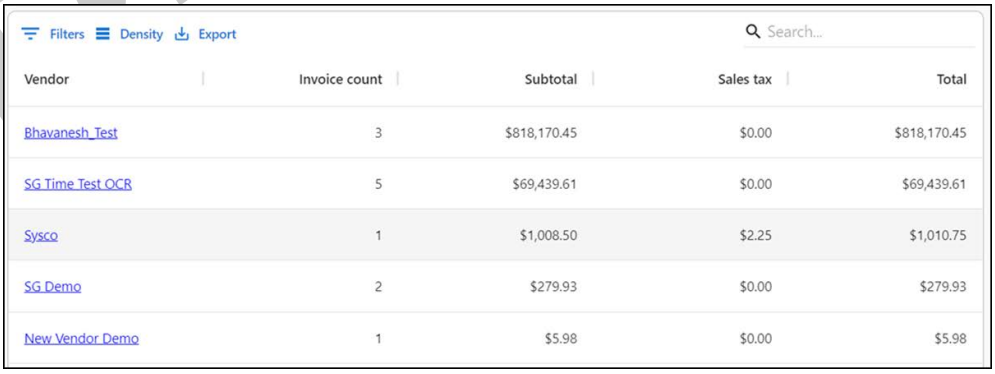
6. Select one or more **vendors** from the drop-down list. The following details appear on the screen:



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.



Additionally, the following details appear in a tabular format:

Column	Description
Vendor	Name of the vendor.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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).

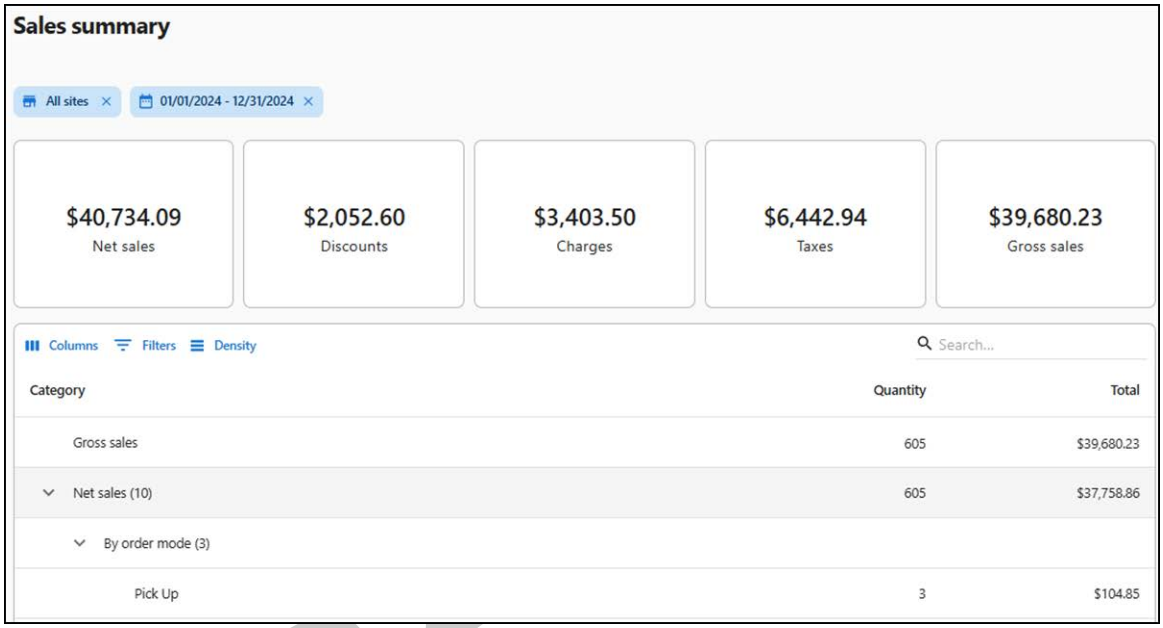
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



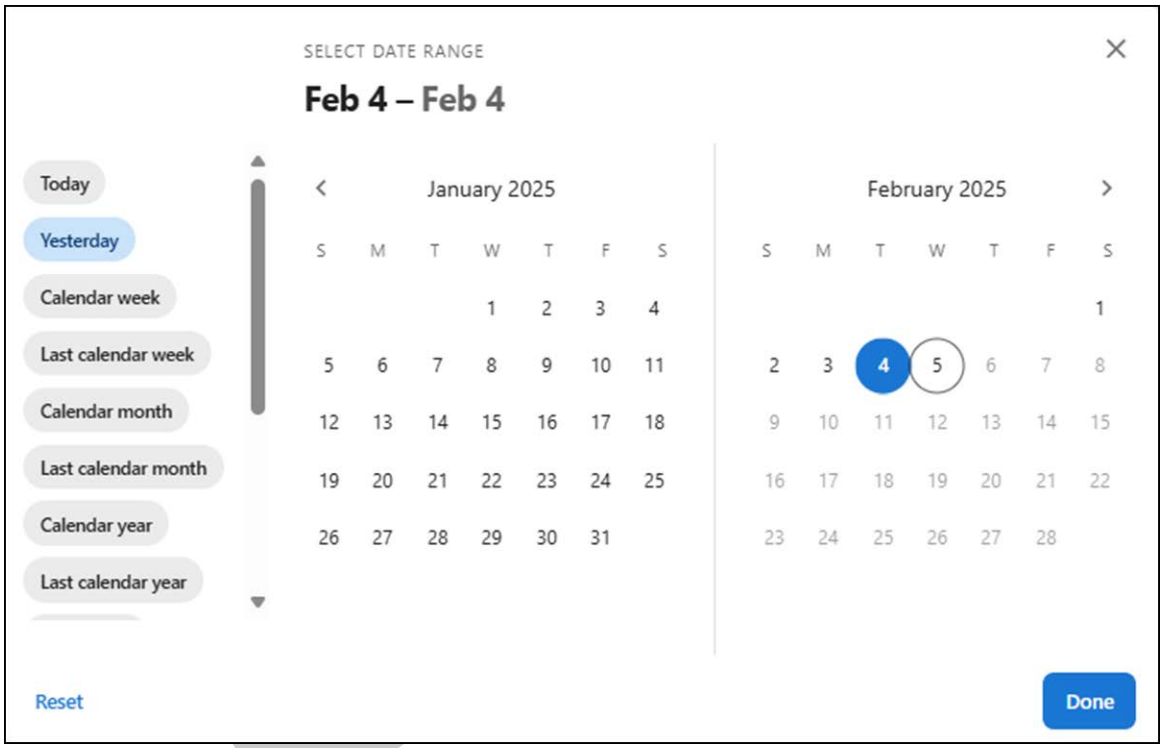
'Sales summary' landing page

DRA

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Date range selections

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

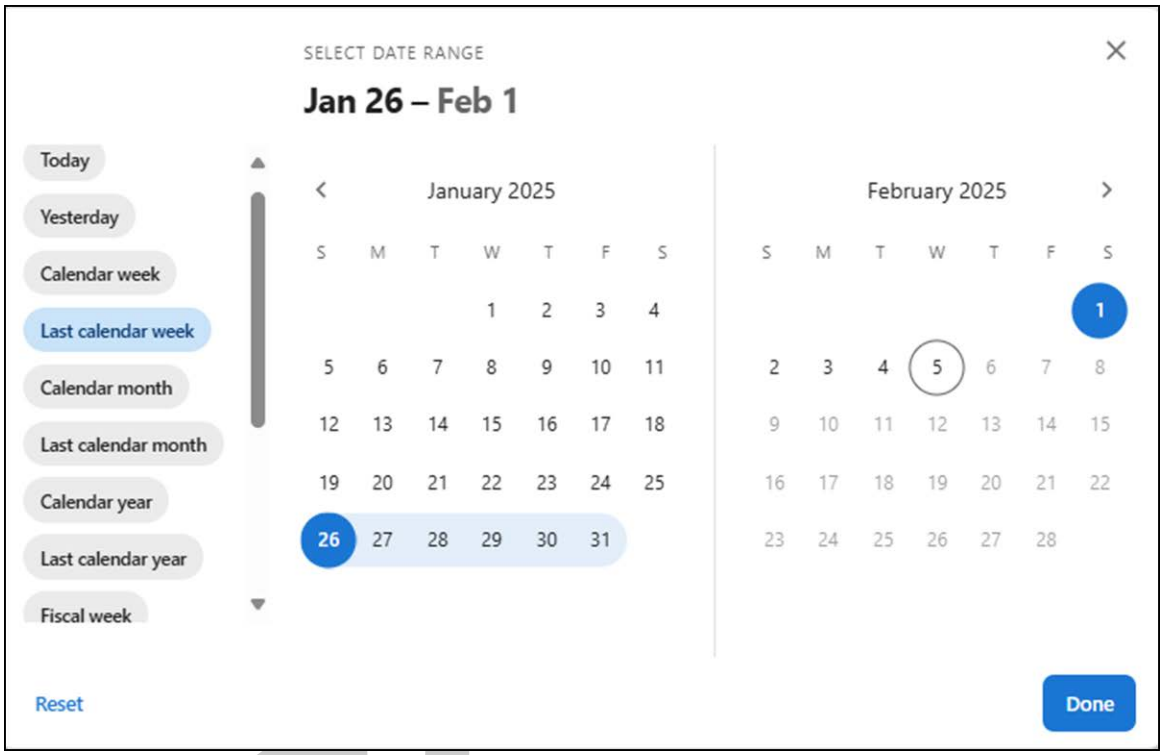


Figure 1 - 1

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

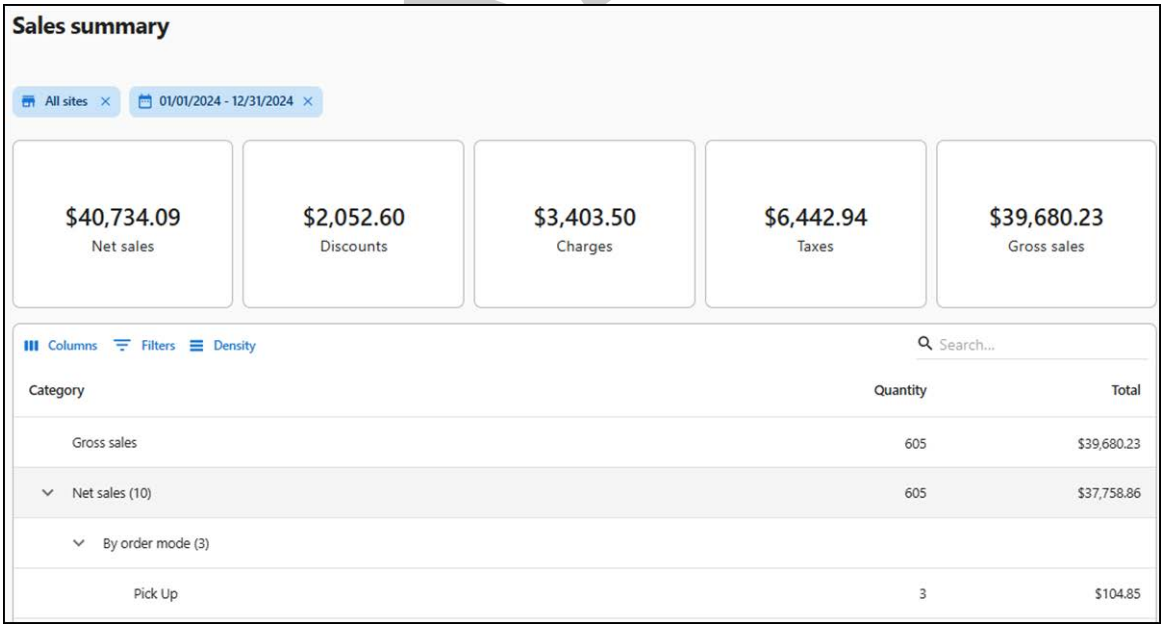
Working with sales reports

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..

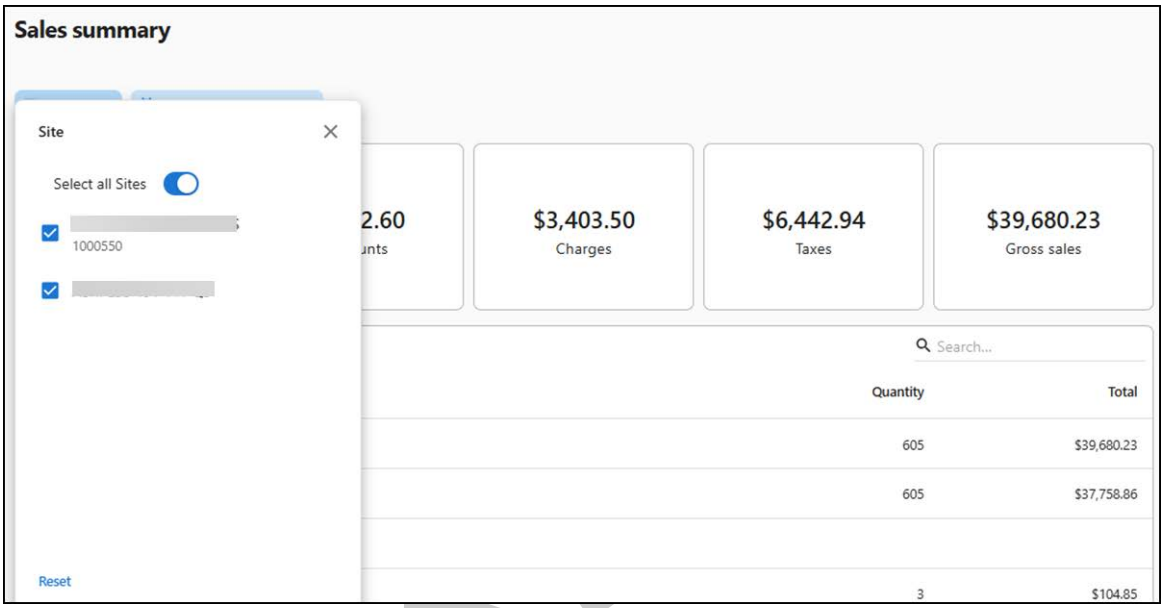


Sales summary report

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

To run the 'Sales summary' report:

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



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.

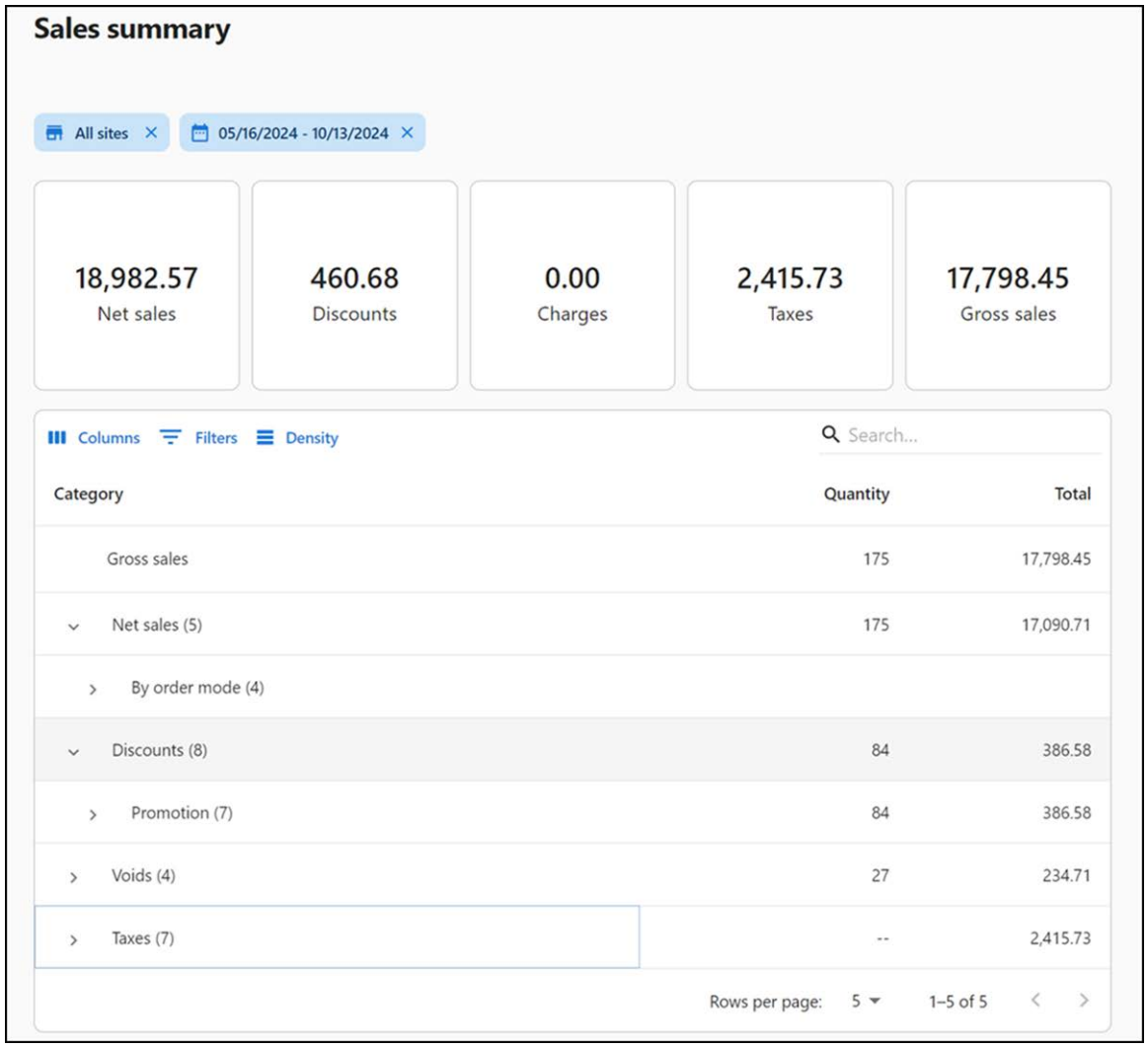
Note
Note: Only the sites to which you have access appear in the report.

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

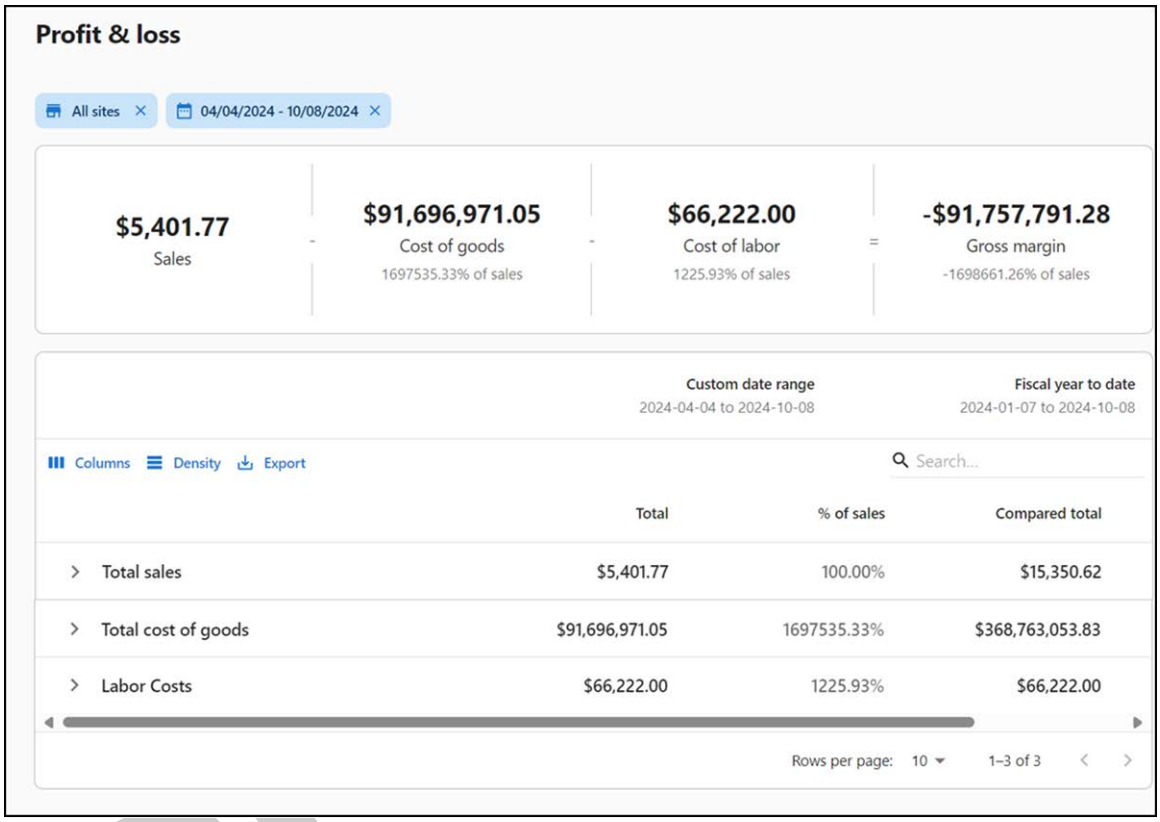
Column	Description
Category	Name of the category, such as Net Sales, Gross Sales, Taxes, and more.
Quantity	Total number of transactions for each payment type.
Total	The total sales amount including tips and gratuities for the transaction.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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:

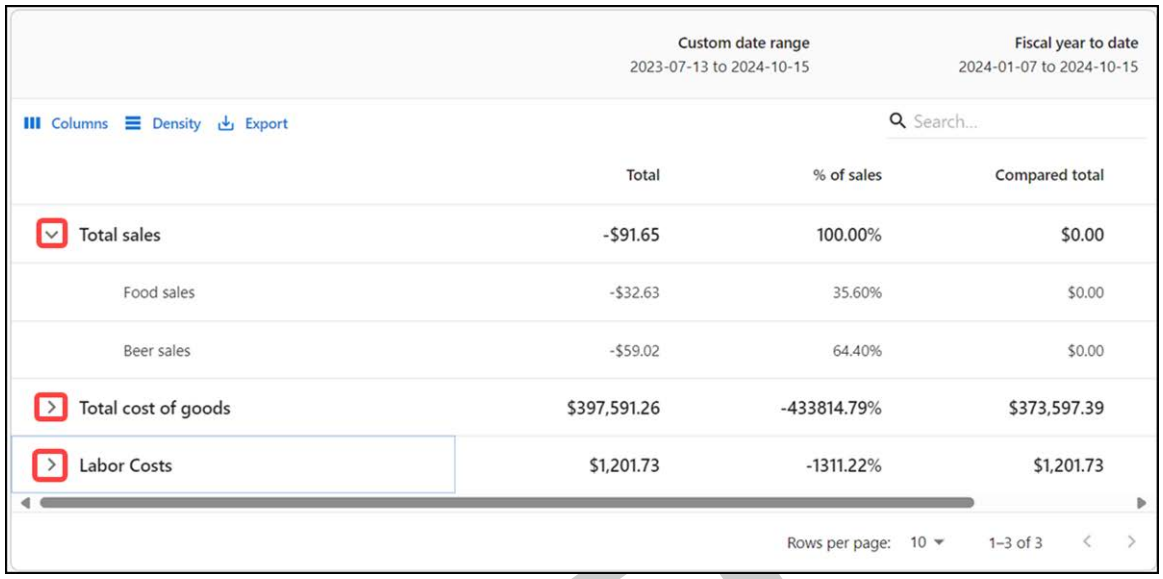
1. Select **Sales** > **Report** > **Profit & loss**. The 'Profit & loss' report for the previous day appears by default.
2. Select a **site** from the drop-down list.

   -OR-

   Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

4. Select a **date range.**



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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

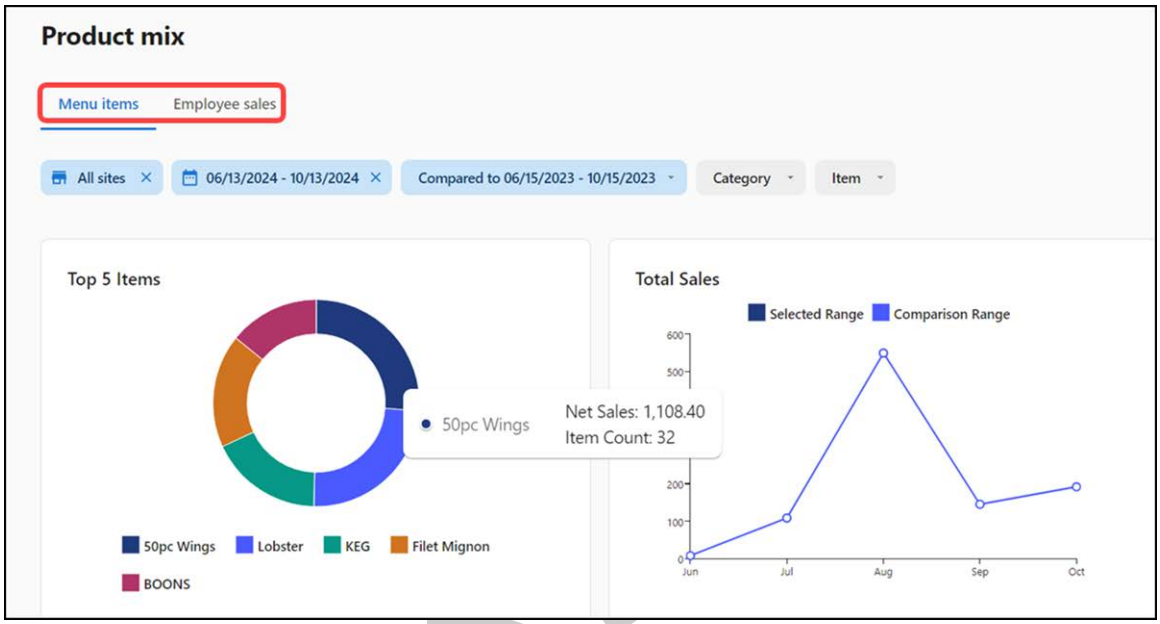
Row	Description
Compared total	Displays the total compared to the fiscal year. See "Configuring the fiscal calendar" on page 156.
Compared % of sales	Displays the percentage of sales compared to the fiscal year.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

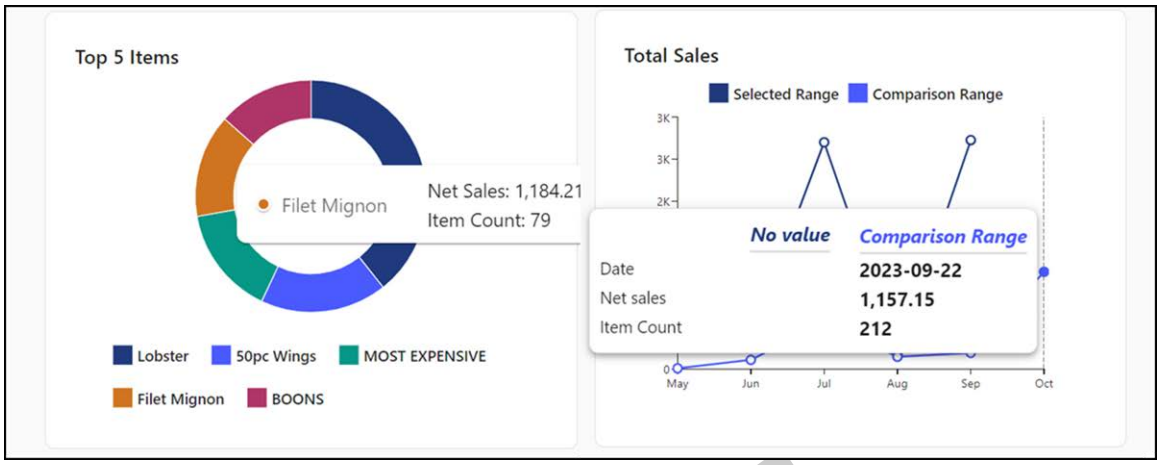
The 'Product mix' report offers two views:

- Menu items
- Employee sales

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

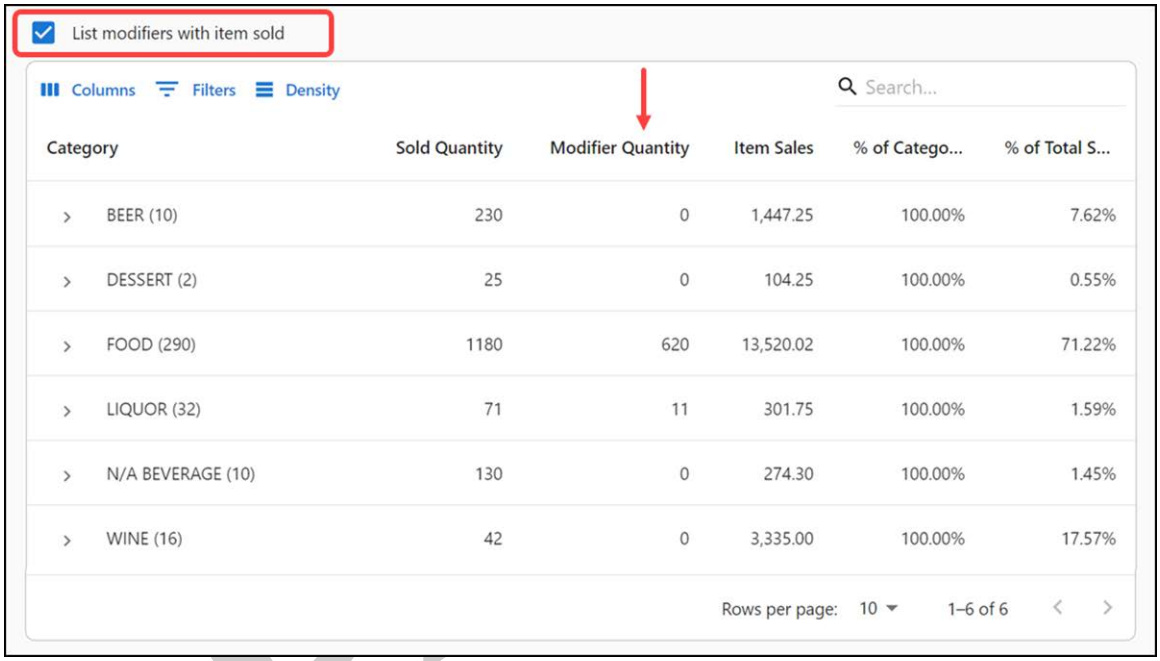
   Top 5 items — Displays data in a circle with different colors displaying each item with a color. Hover over areas of the circle to view the sales data of the item.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

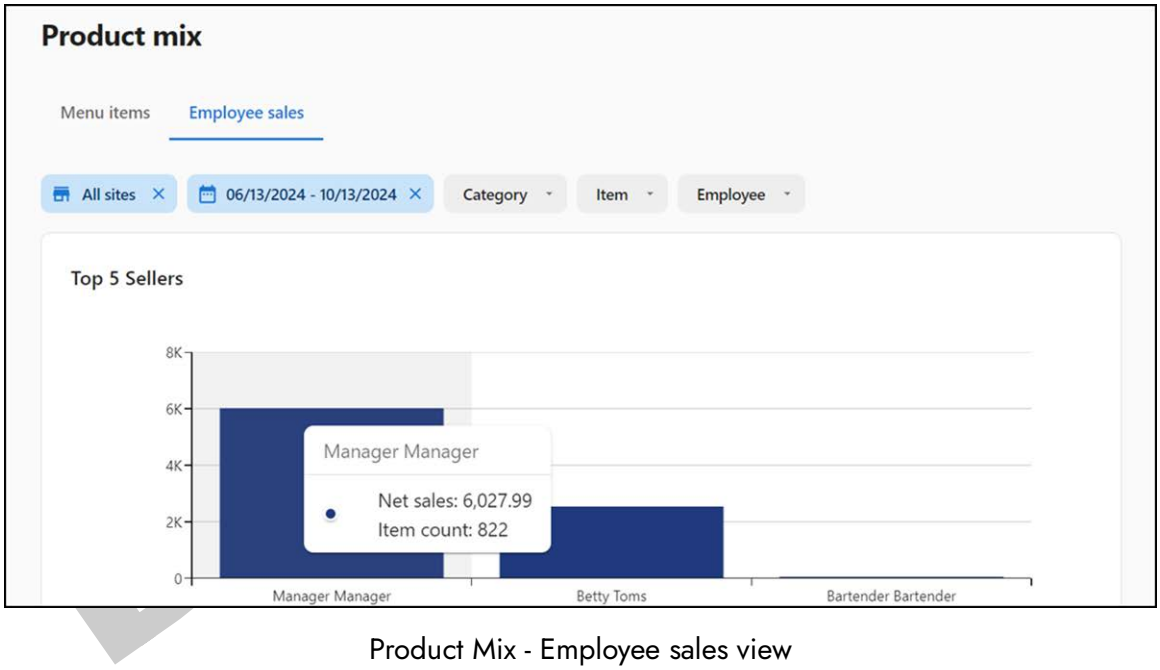
Employee sales view

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.

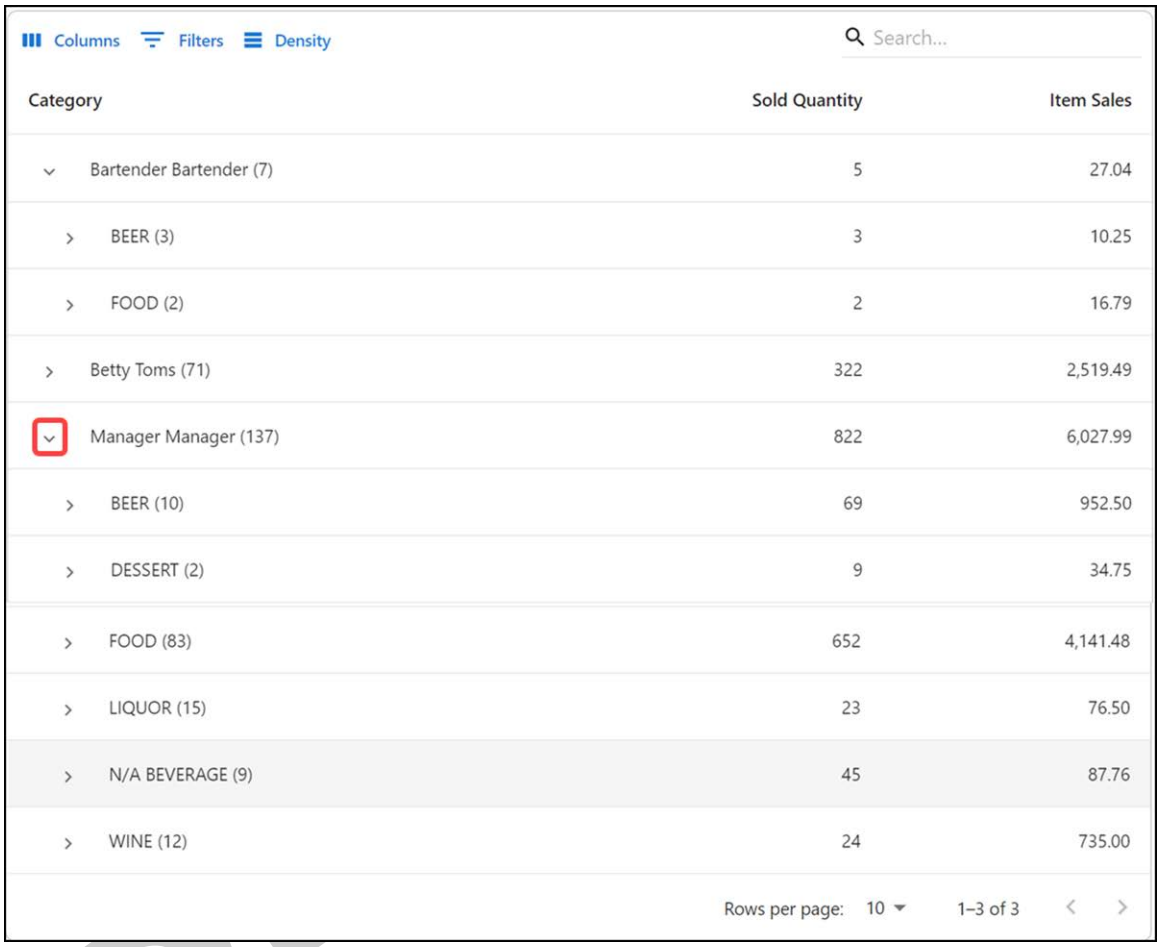


Product Mix - Employee sales view

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions



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.

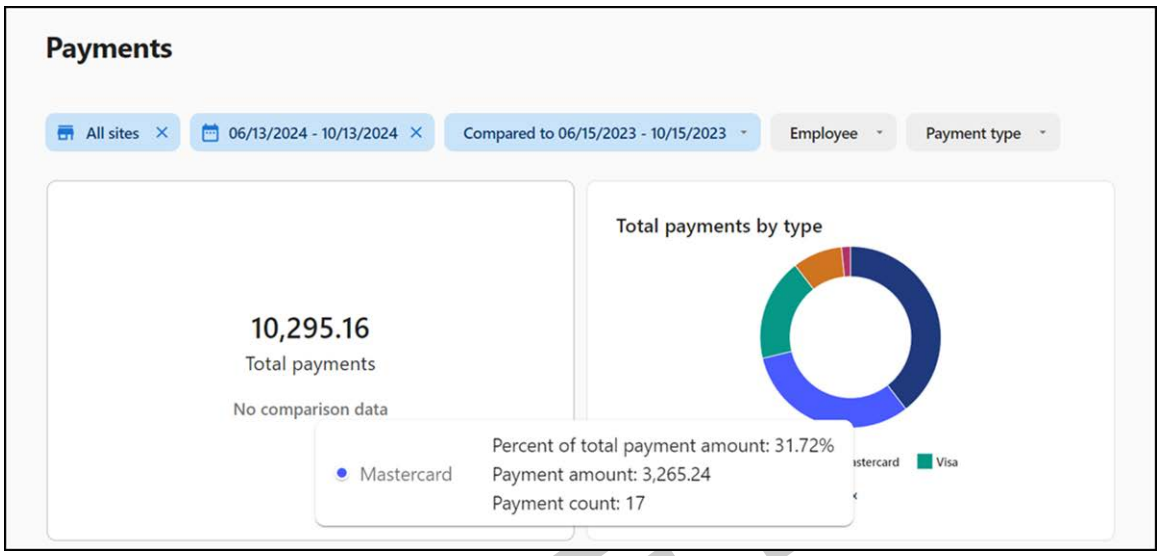
To refine your search:

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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-

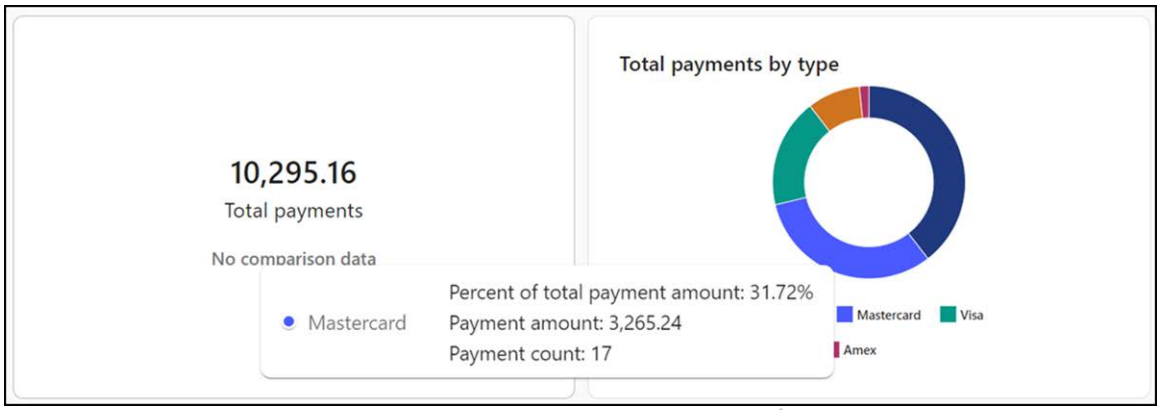
   Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.
4. Select a **date range** from the drop-down list.
5. To refine your search you can select multiple/all the **Payment types** to view the data.

   You can select /multiple/all employees from the drop-down list to view the payment data specific to the selected employees.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



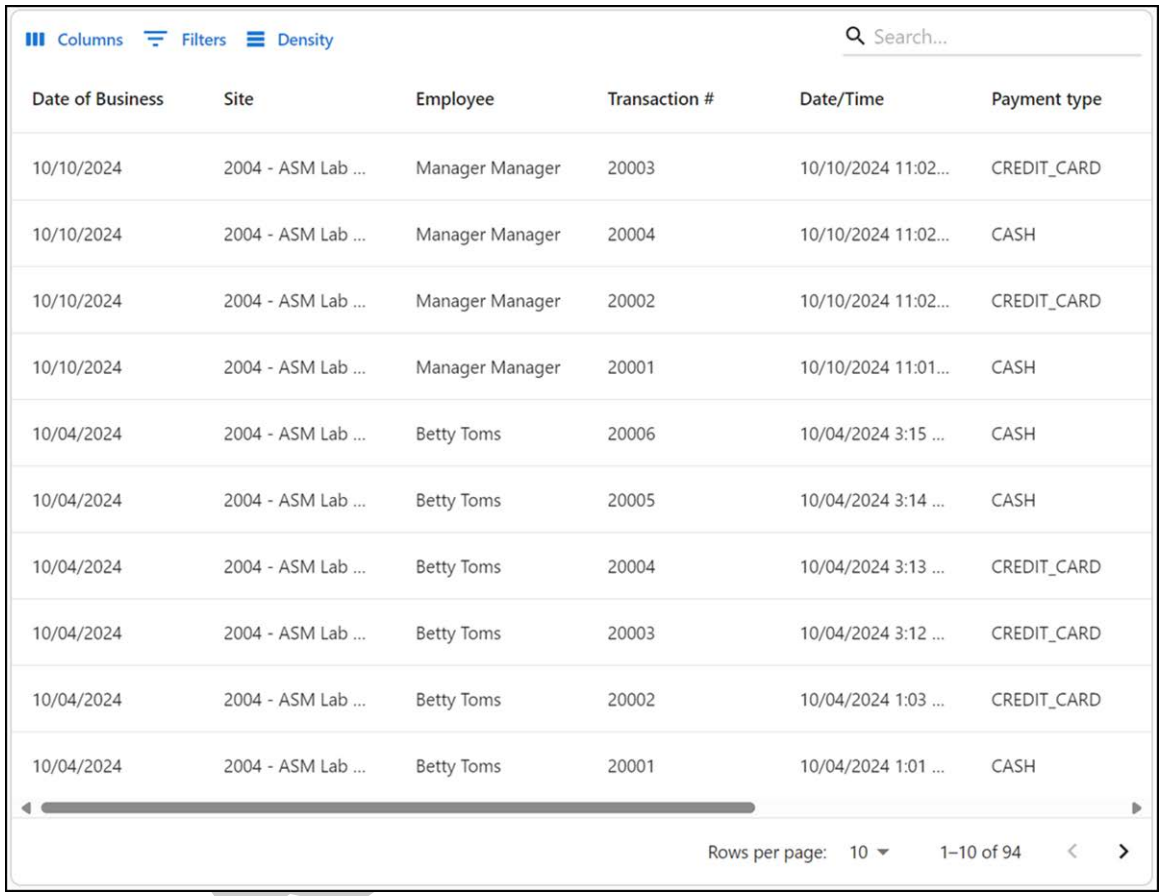
Sales report - Payments and total payments by type

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions



Payments summary

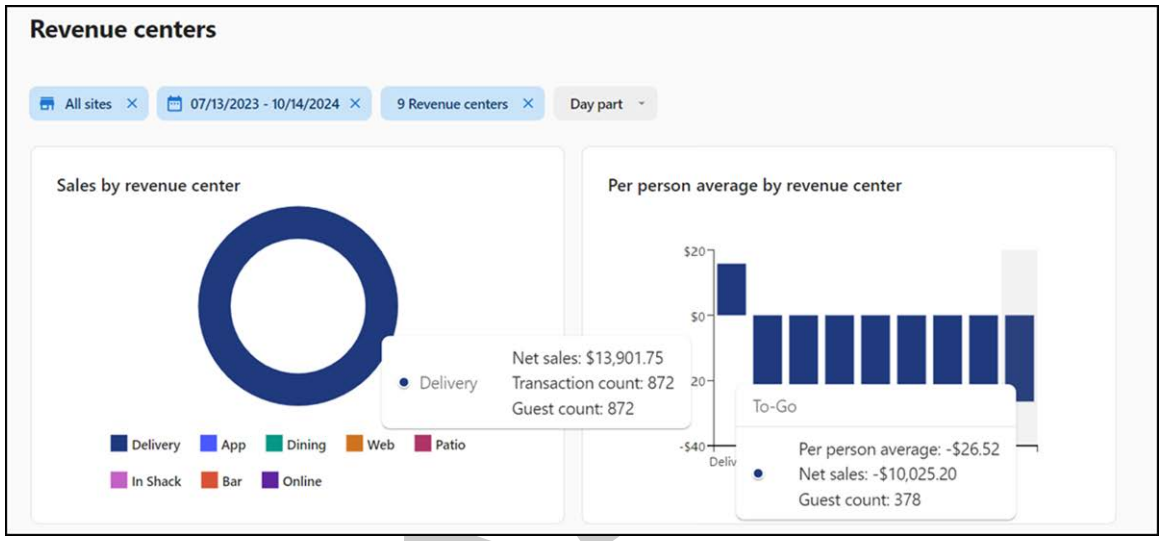
The data in the table appears with the following information:

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

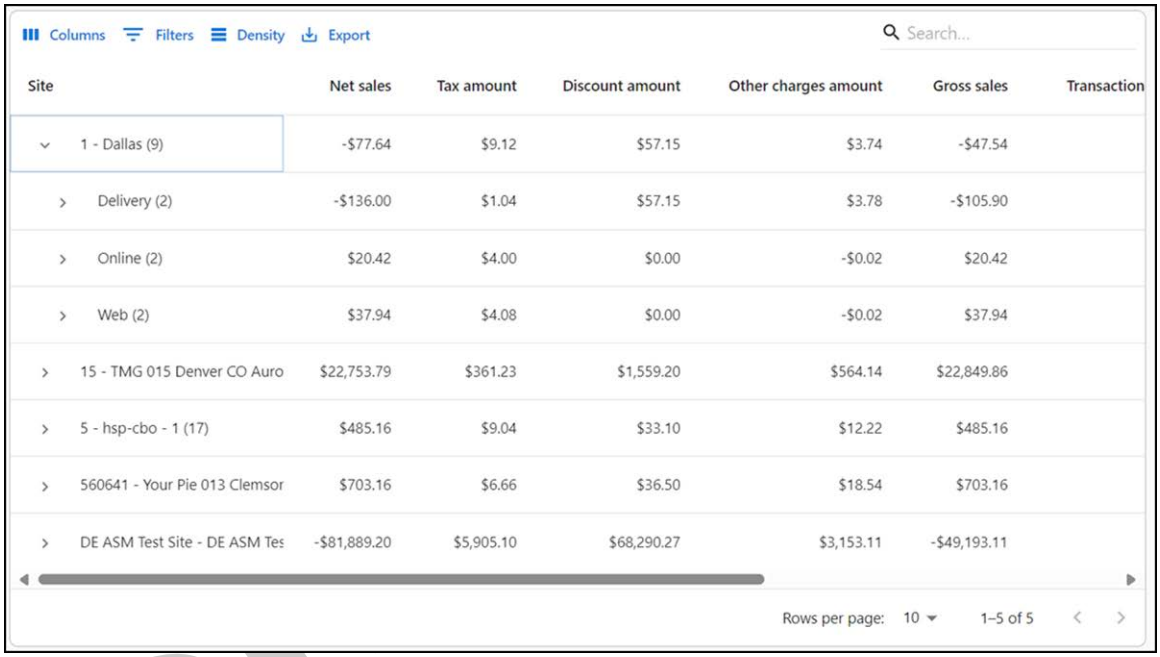
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

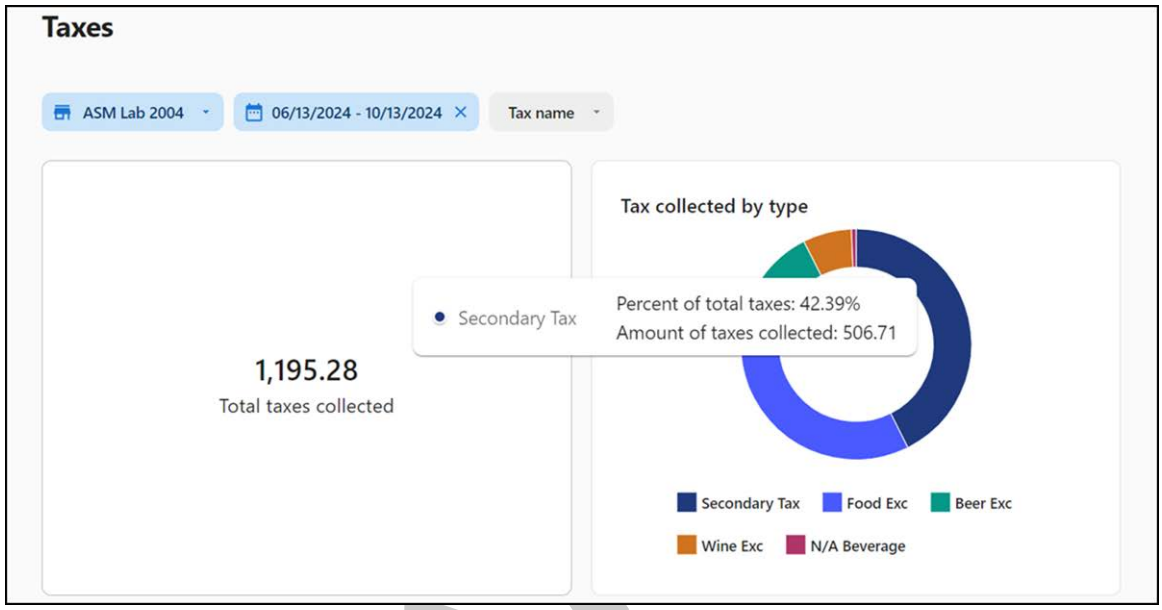
Column	Description
Per person average	Net sales of a transaction are divided by the number of guests on the transaction.
Transaction average	Total net sales divided by the number of non-voided transactions.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

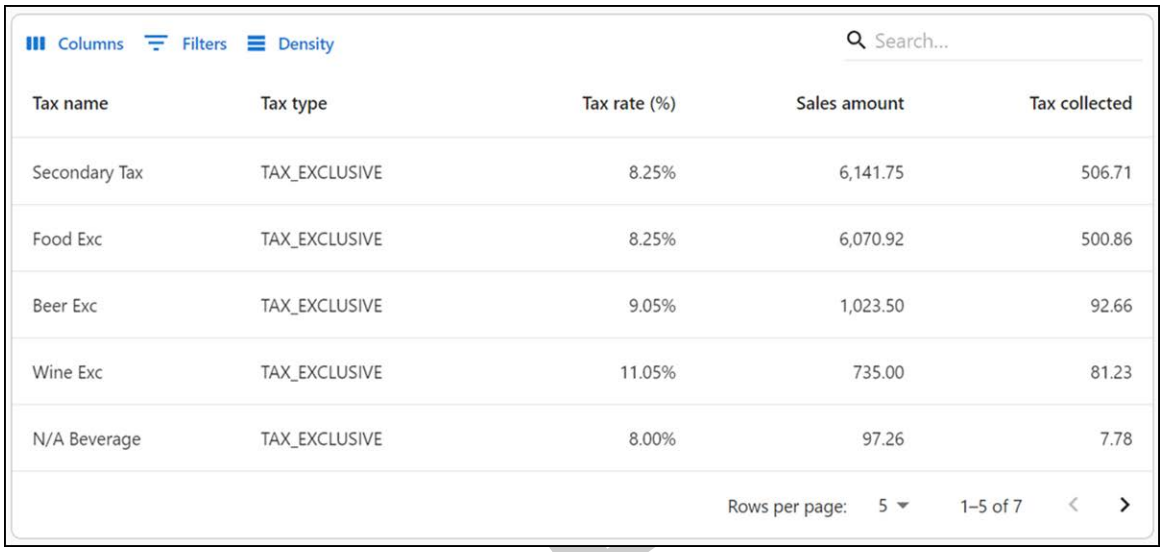
The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



Sales Reports - Taxes summary

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

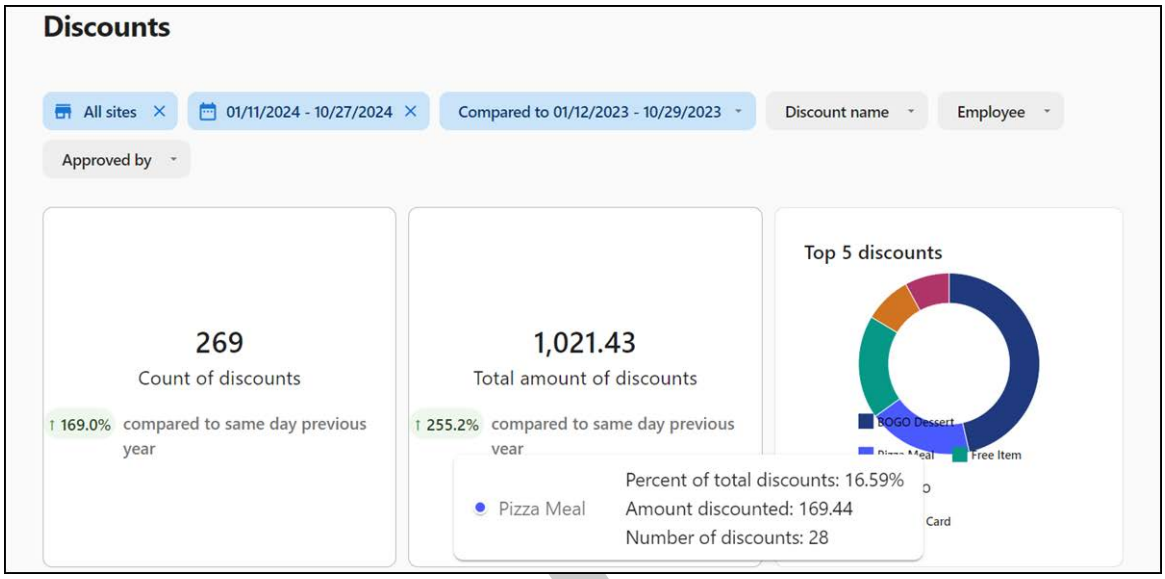
Column	Description
Tax name	Name of the tax category.
Tax type	Type of tax applied.
Tax rate (%)	Percentage of the amount to be deducted.
Sales amount	Amount to be collected as tax for that tax category.
Tax collected	Total amount collected as tax.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

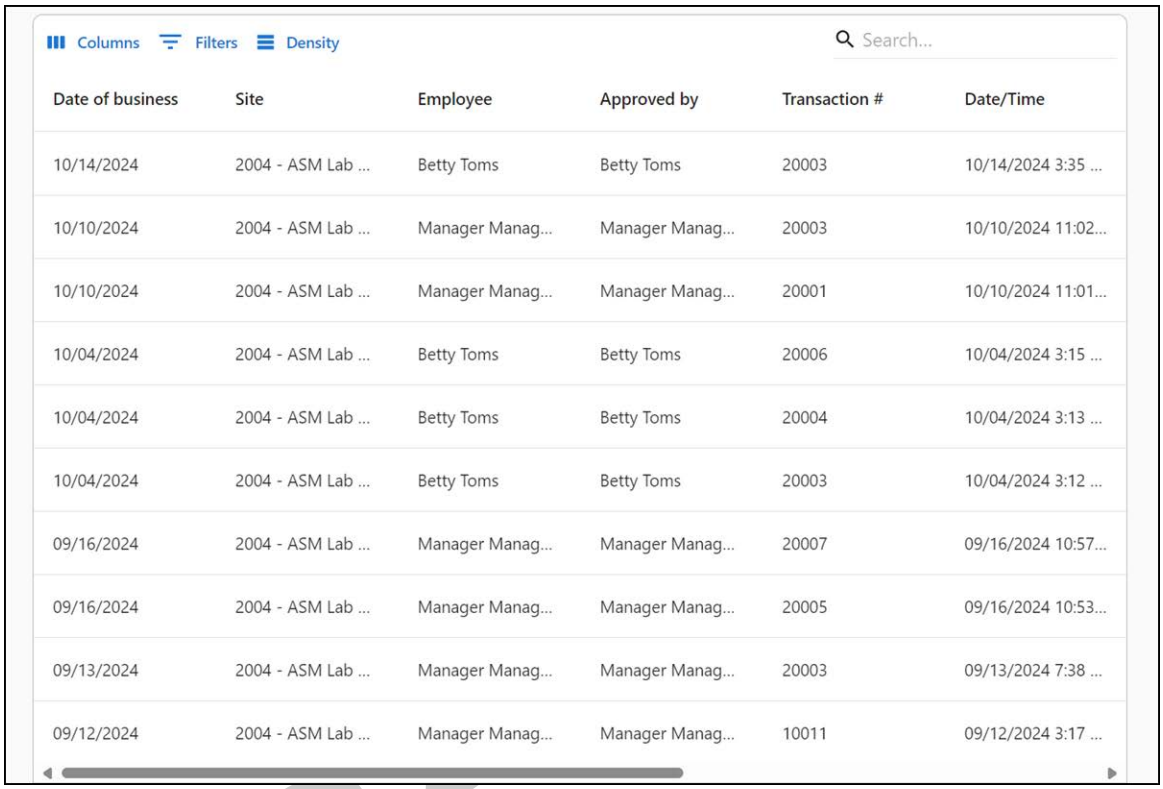
Count of discounts — Displays the total number of discounts.

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

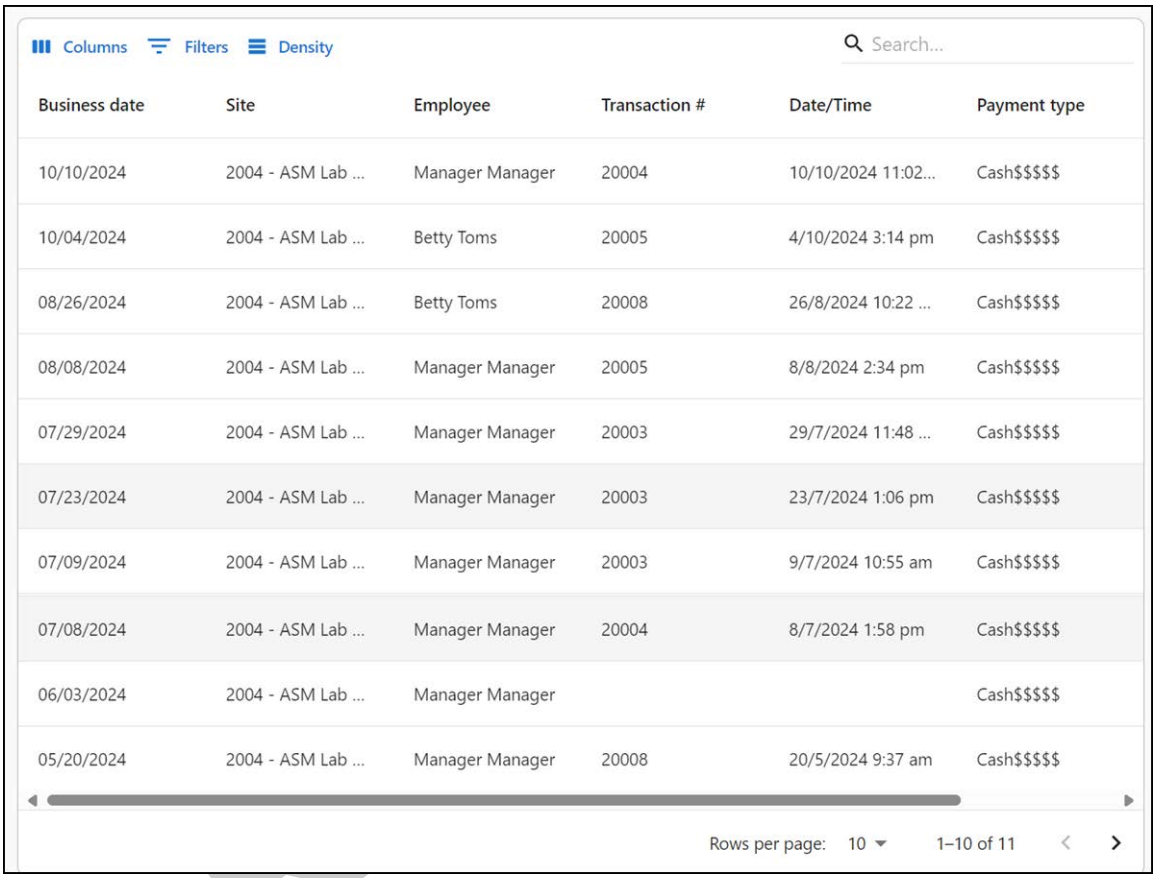
The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.

Refund count — Displays the total number of refunds issued.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



Sales reports - Refunds table

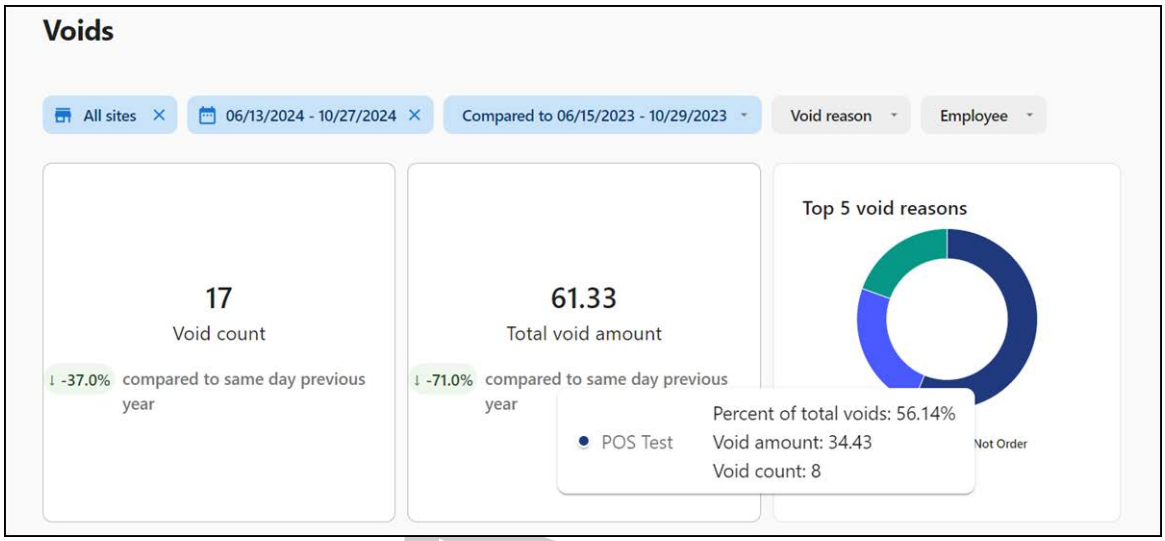
The data appears in the form of table with the following information:

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

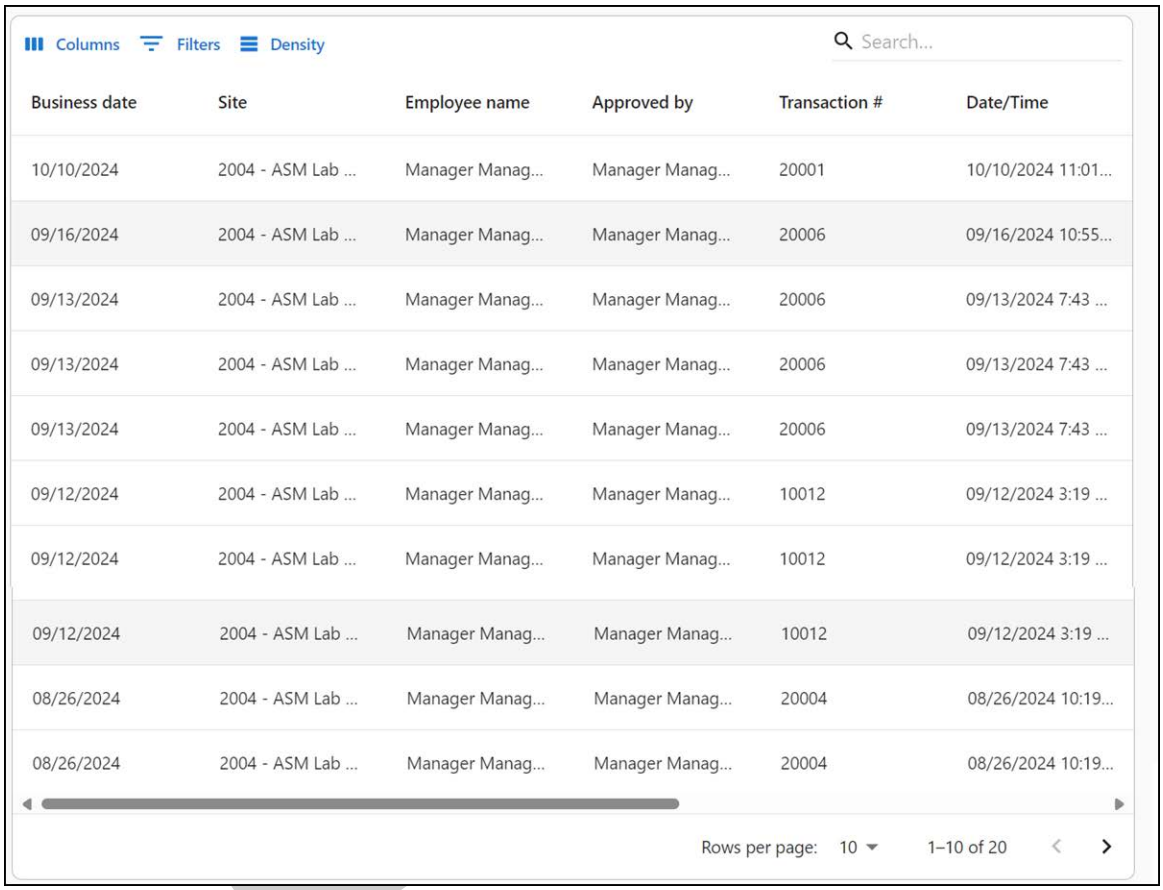
Void count: — isplays the total number of void transactions.

Total void amount: — isplays 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.

DRA

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions



Sales reports - Voids table

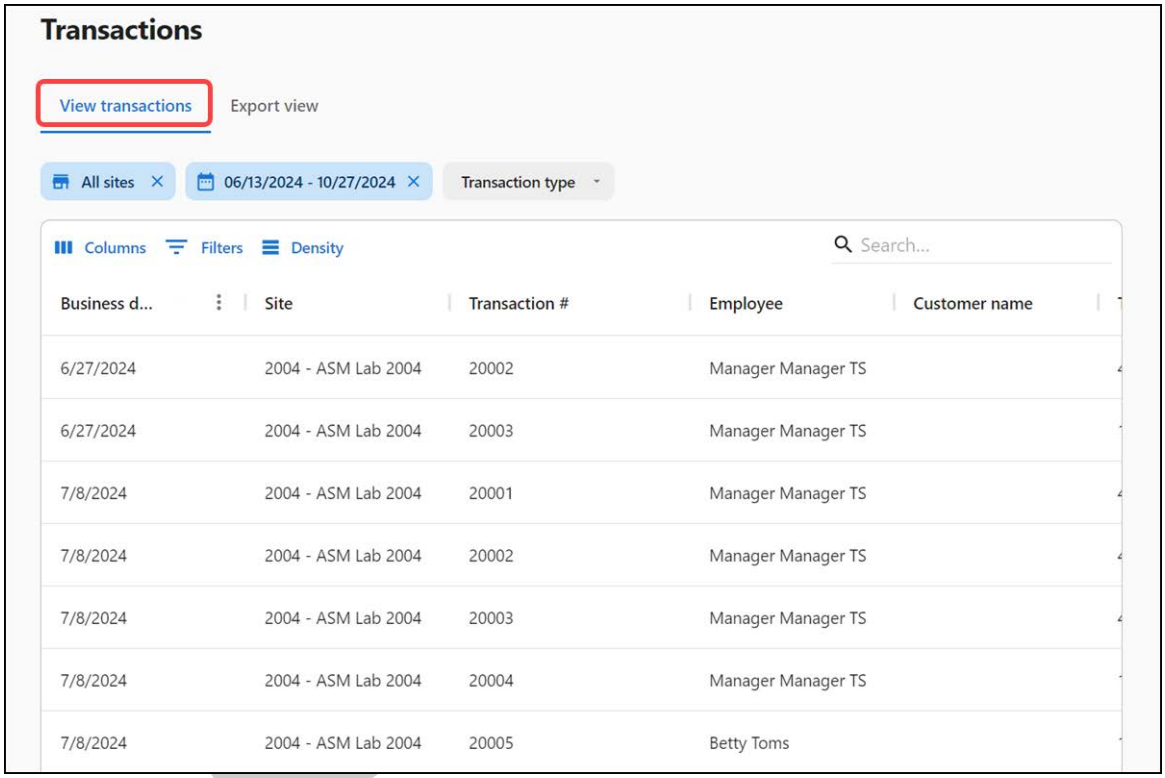
The data appears in the form of table with the following information:

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Viewing transactions

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



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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

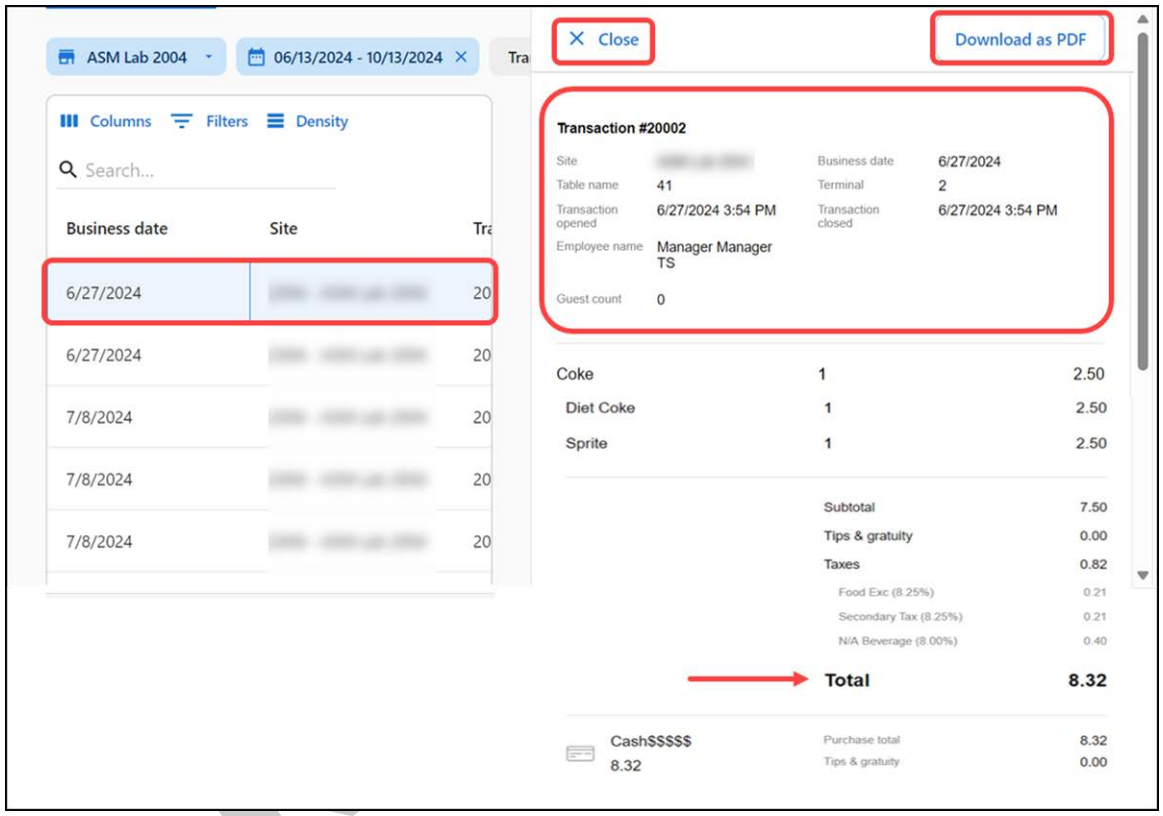
The transactions appear in tabular form with the following information:

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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:

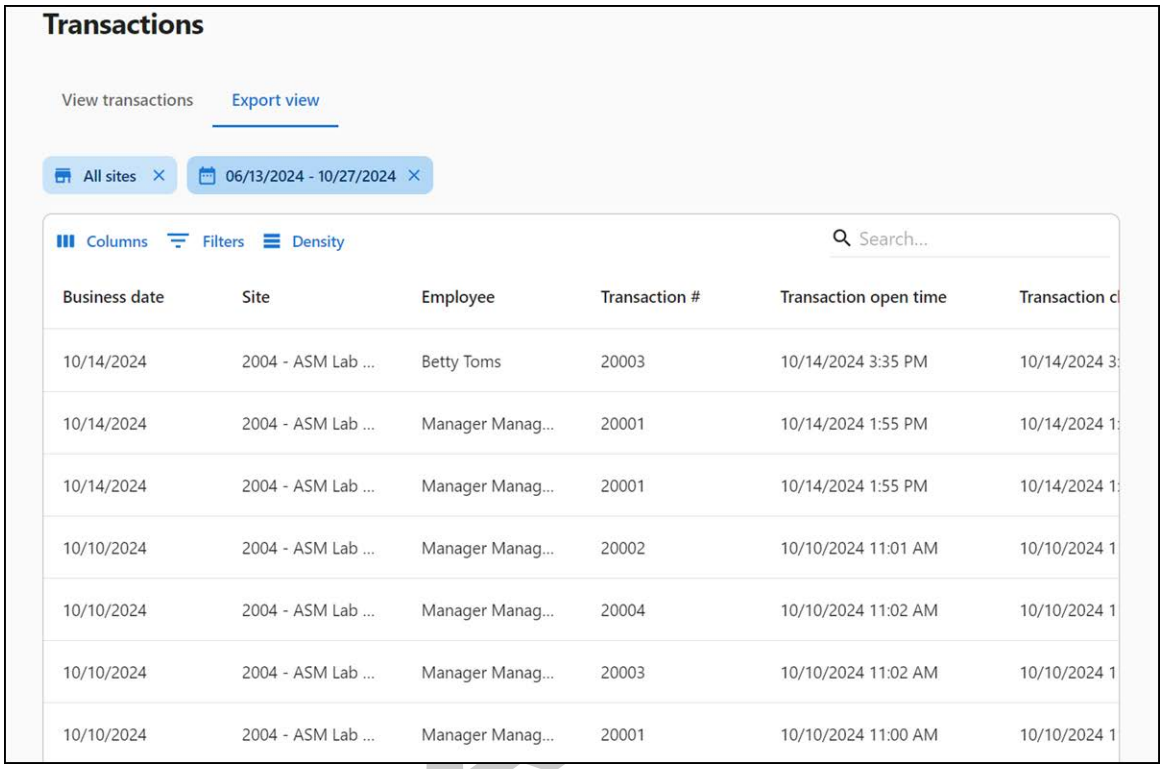
1. Select **Sales** > **Transactions** > **Export view**. The 'Transactions export' report for the previous date appears by default.
2. Select a **site** from the drop-down list.

   -OR-

   Click **Select all Sites** to view report for all sites.
3. Click **Reset** to reset the site selection.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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 pf 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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

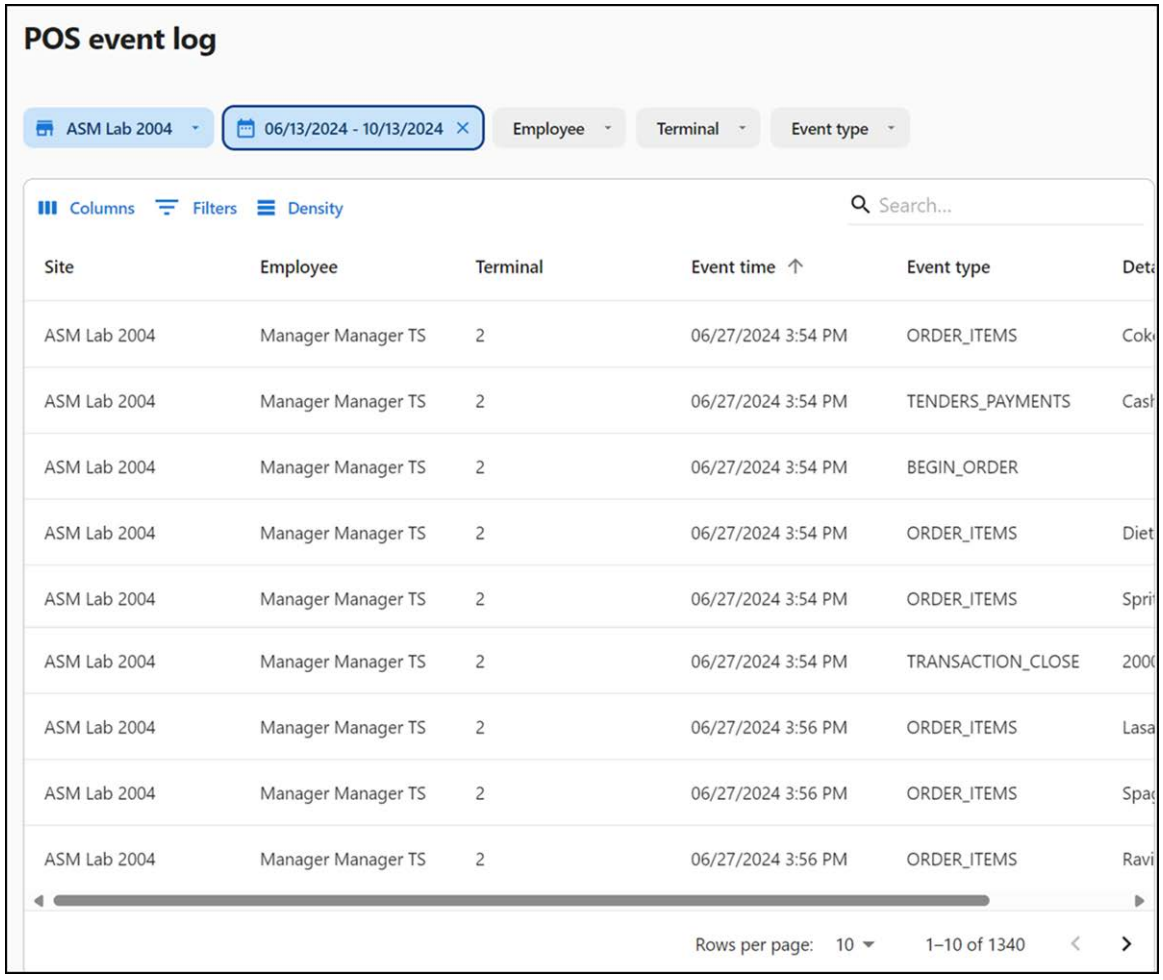
POS event log

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.

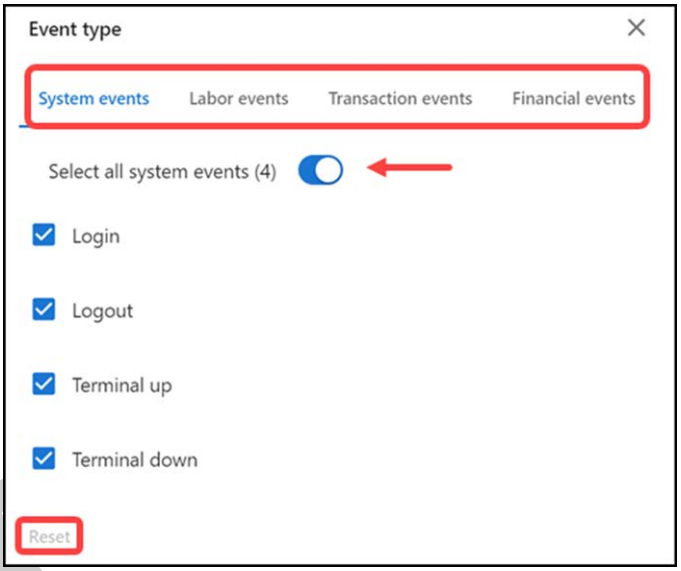
   -OR-

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

The transactions appear in tabular form with the following information:

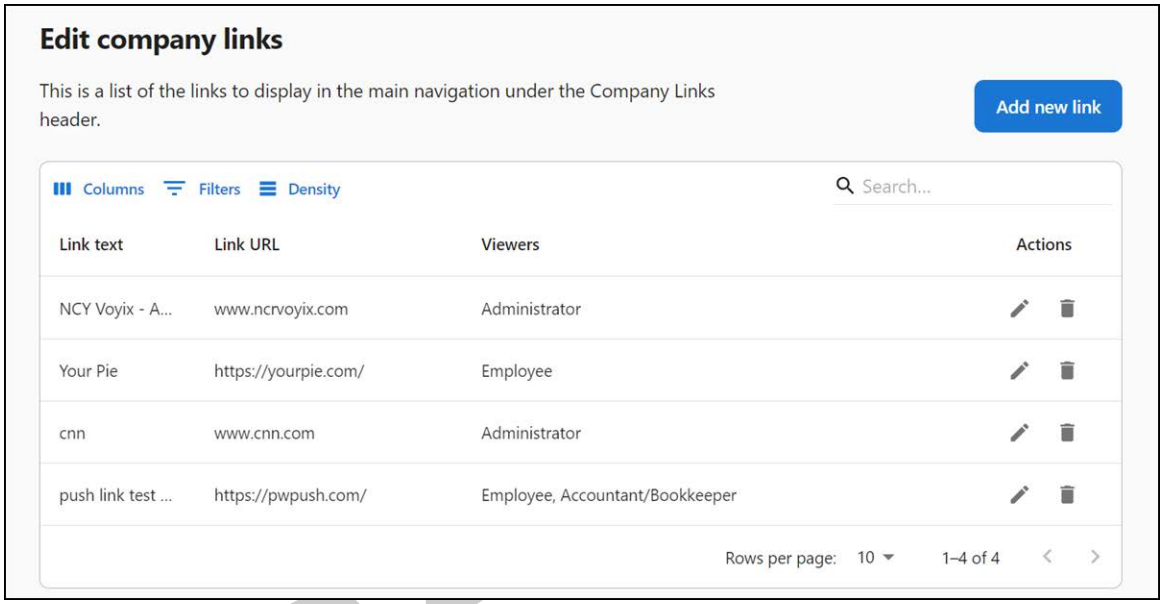
Column	Description
Site	Name of the site.
Employee	Name of the employee.
Terminal	Terminal at which the event was logged.
Event time	Time of the event.
Event type	Type of event.
Details	Total details of the event requested.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



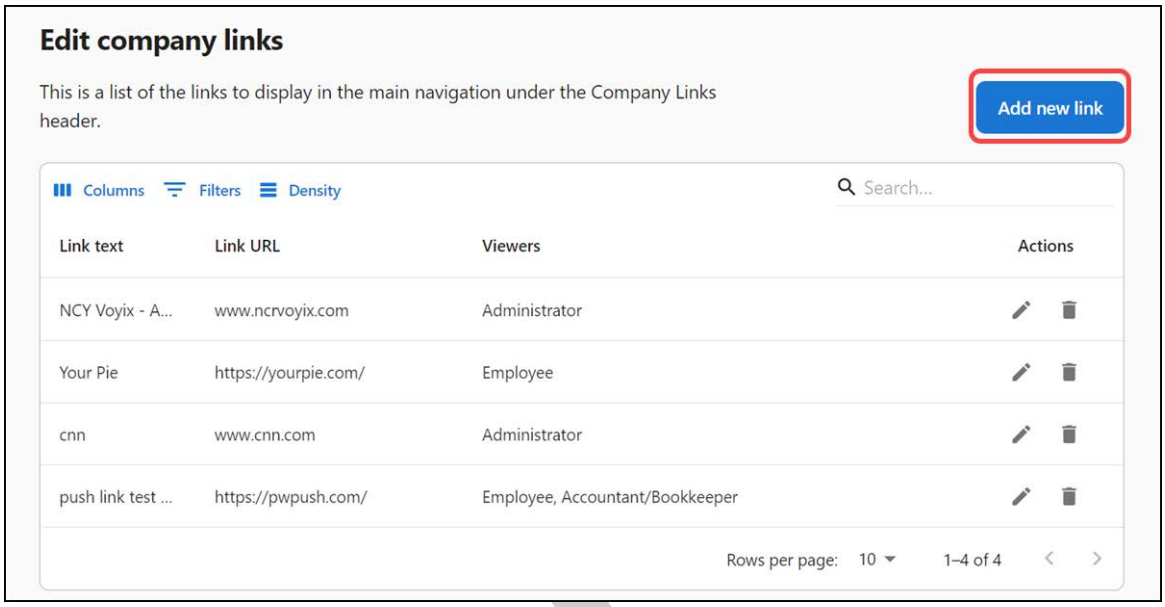
'Edit company links' screen

DRA

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

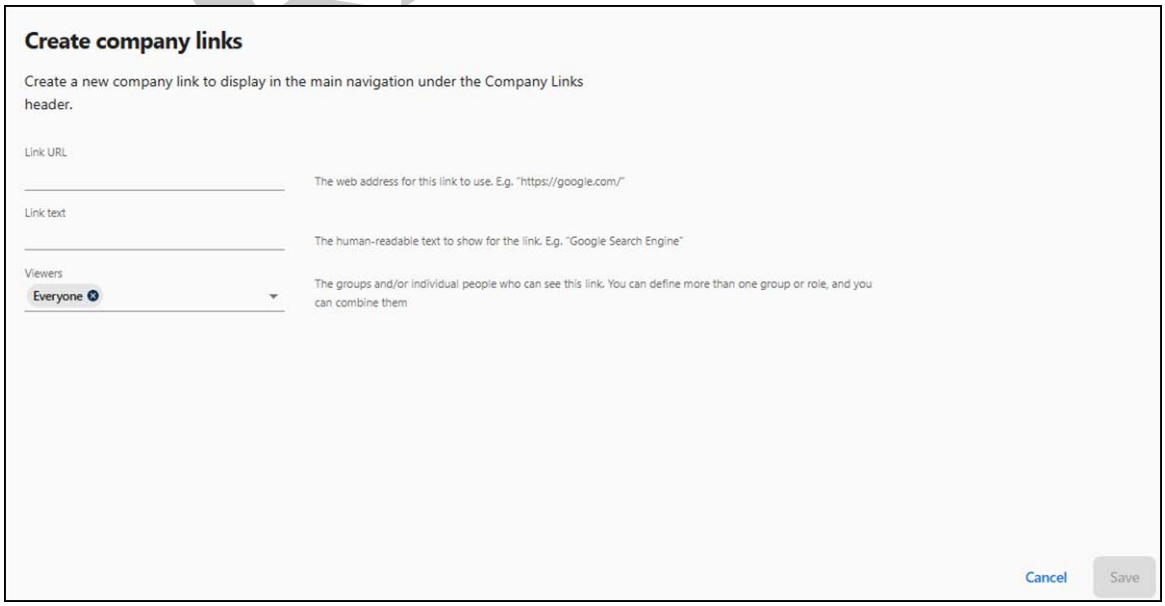
To create a company link:

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

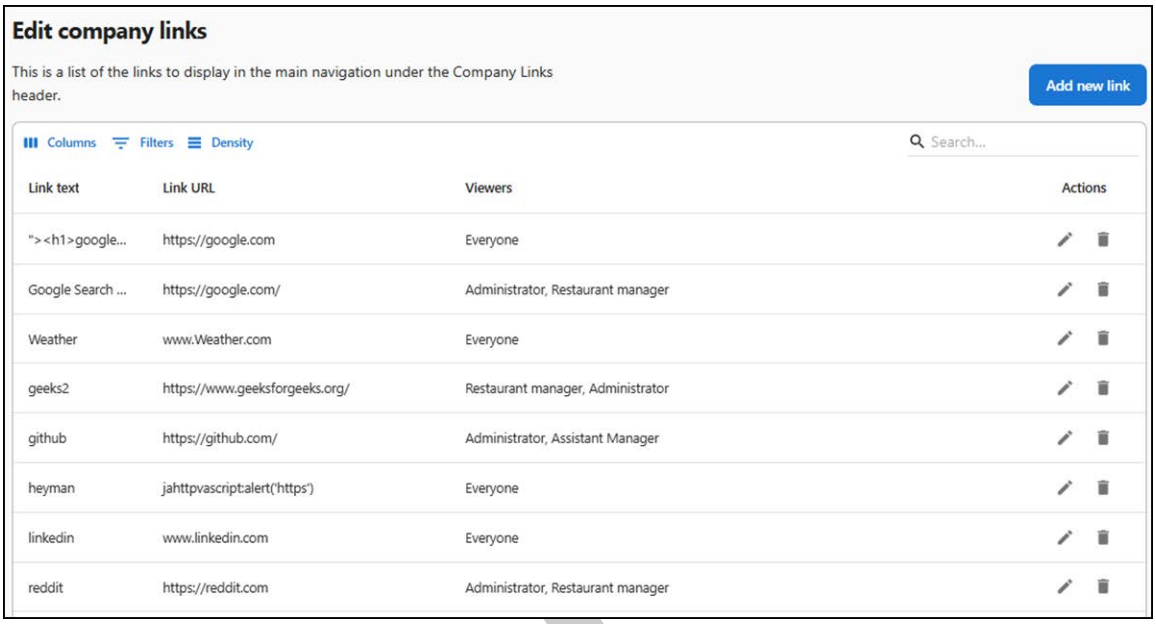
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



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?

DRAFT

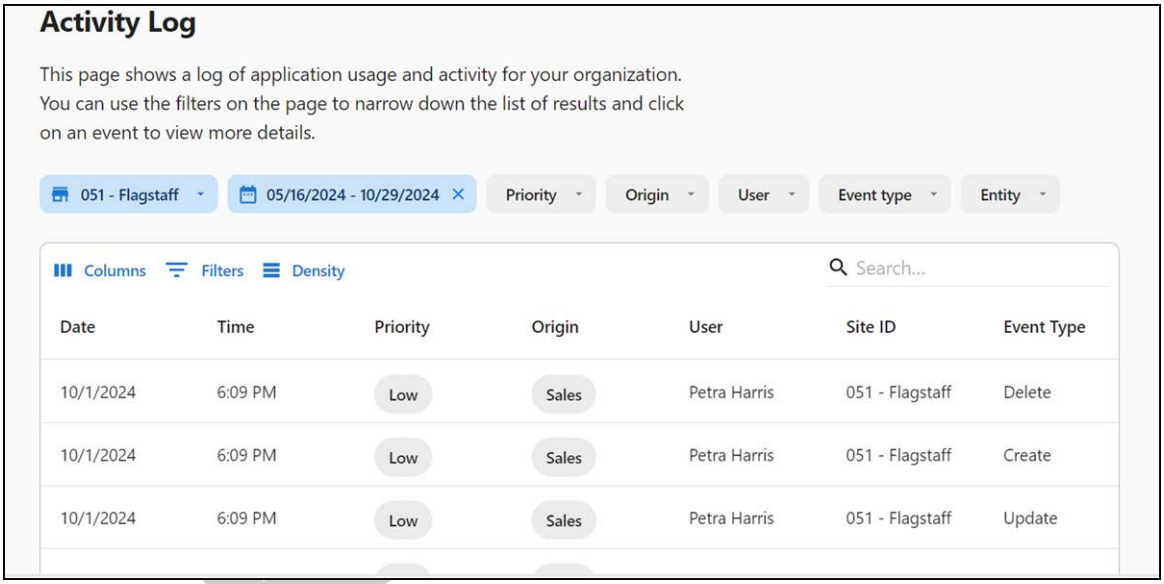
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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 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.

NCR VOYIX
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

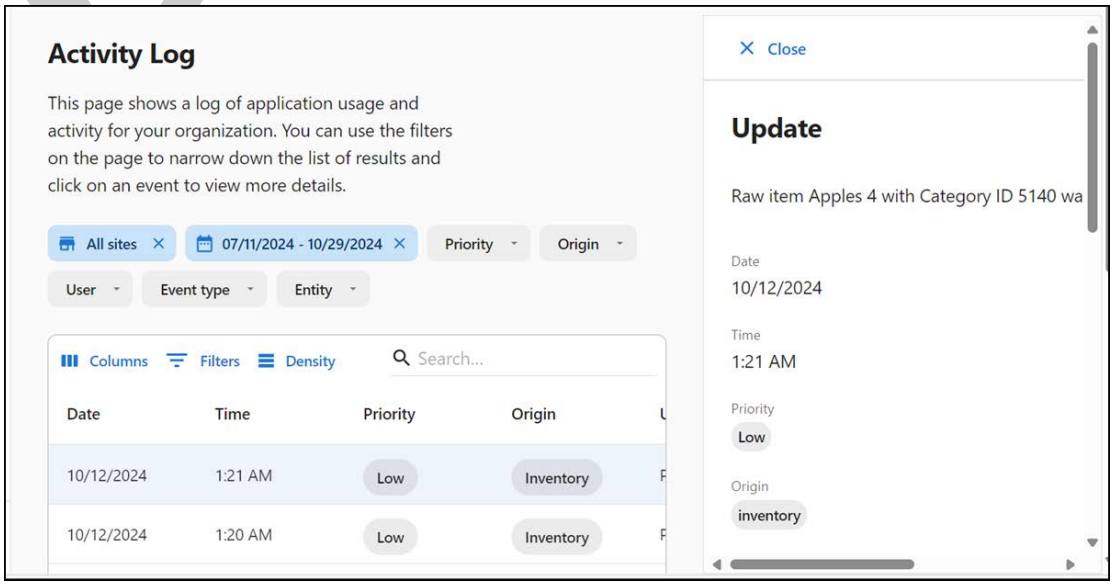
Message — Additional information about the activity.

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.

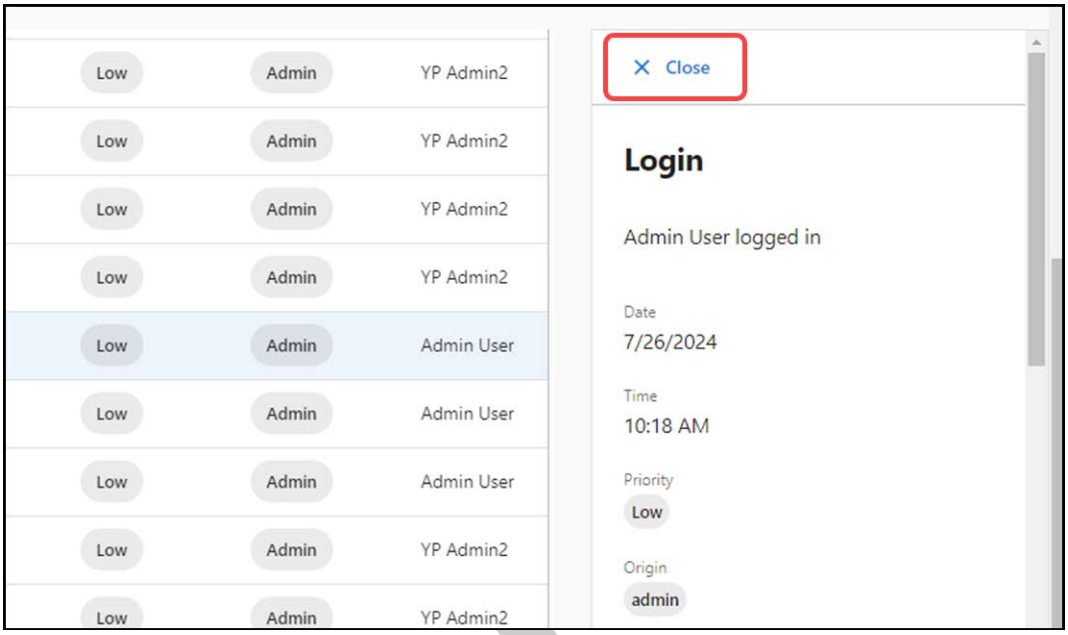


Activity Log side panel

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



Activity Log side panel - Close button

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.'

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

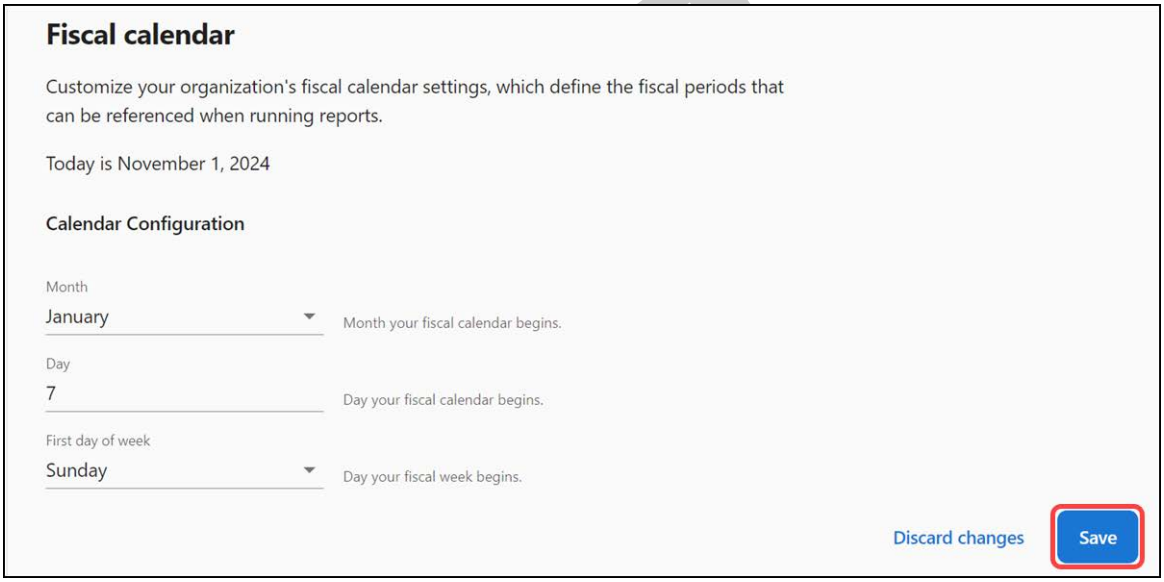
Configuring the fiscal calendar

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 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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

Fiscal calender type

7. Click **Save**.

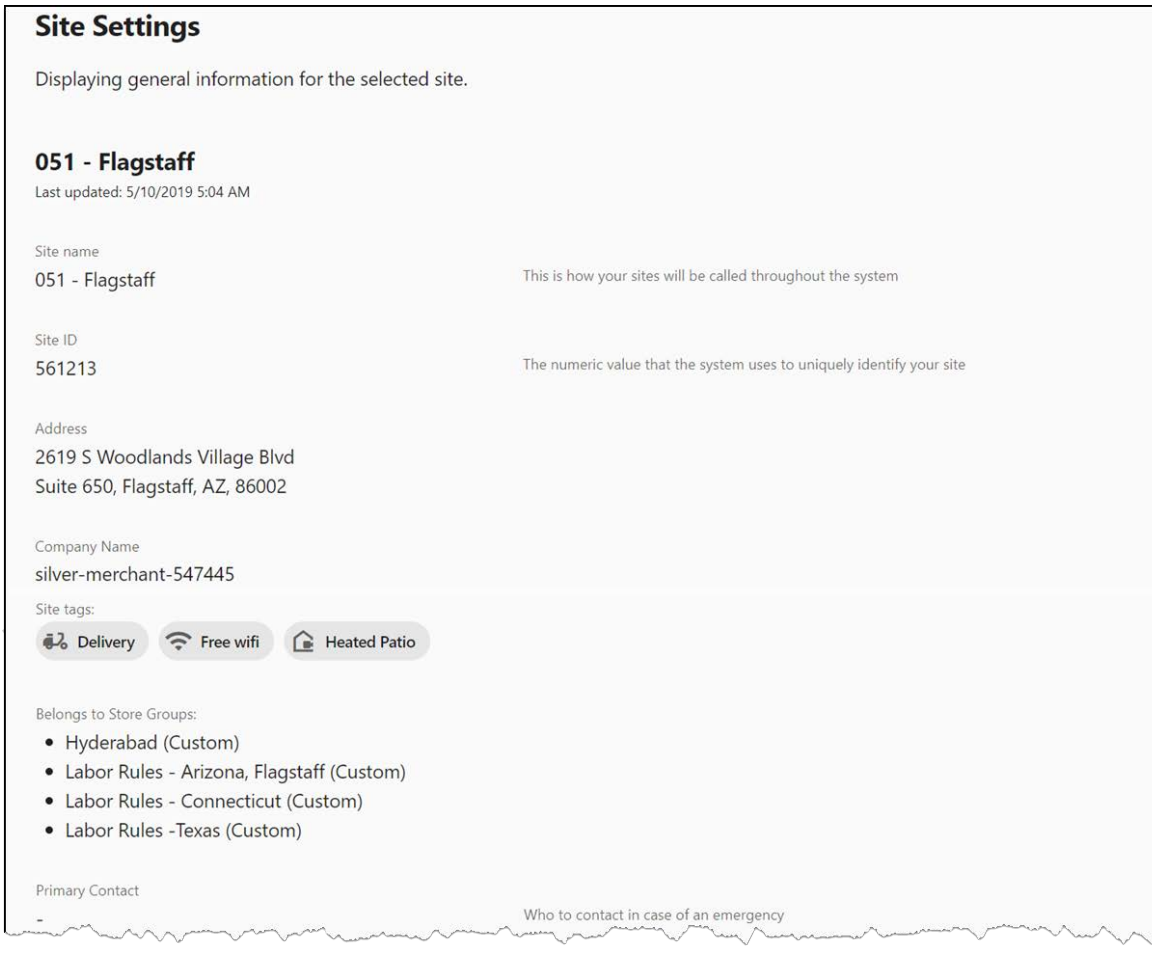
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



'Site Settings' screen

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Configuring the payroll calendar for a site

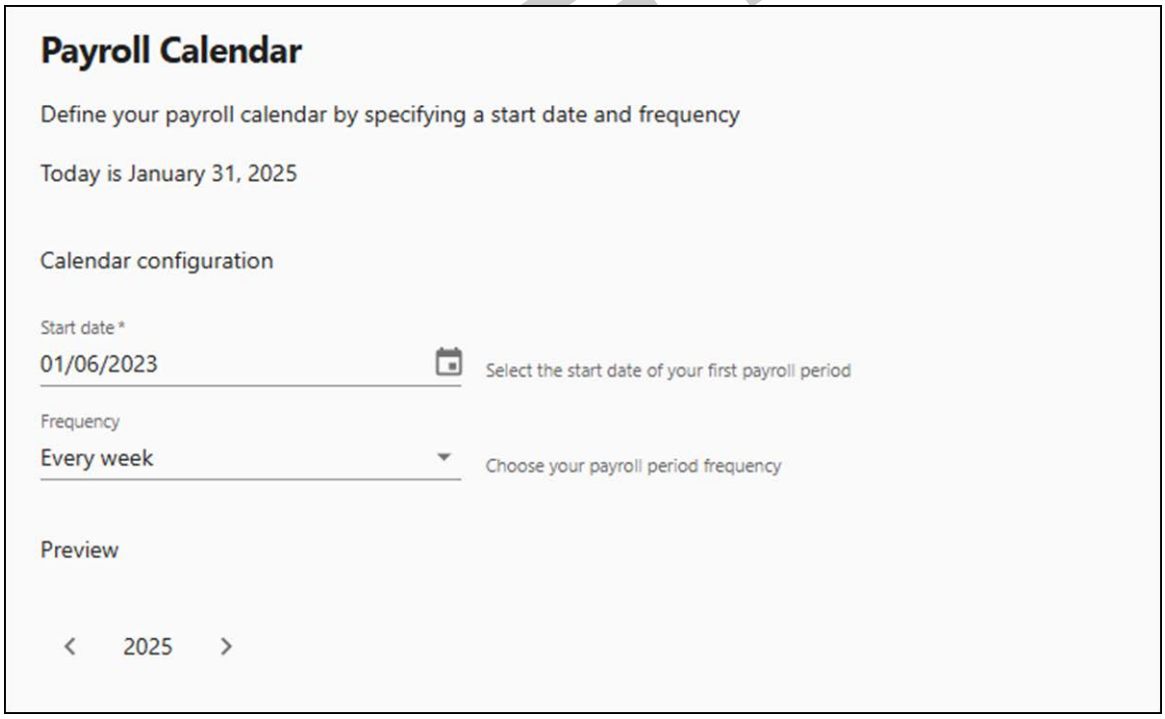
Select Settings > Site settings > Payroll calendar to establish the start date and frequency for your payroll calendar and preview the results. A payroll calendar is a schedule that outlines the pay periods and pay dates to ensure employees are paid accurately and on time. You can set up the payroll 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.

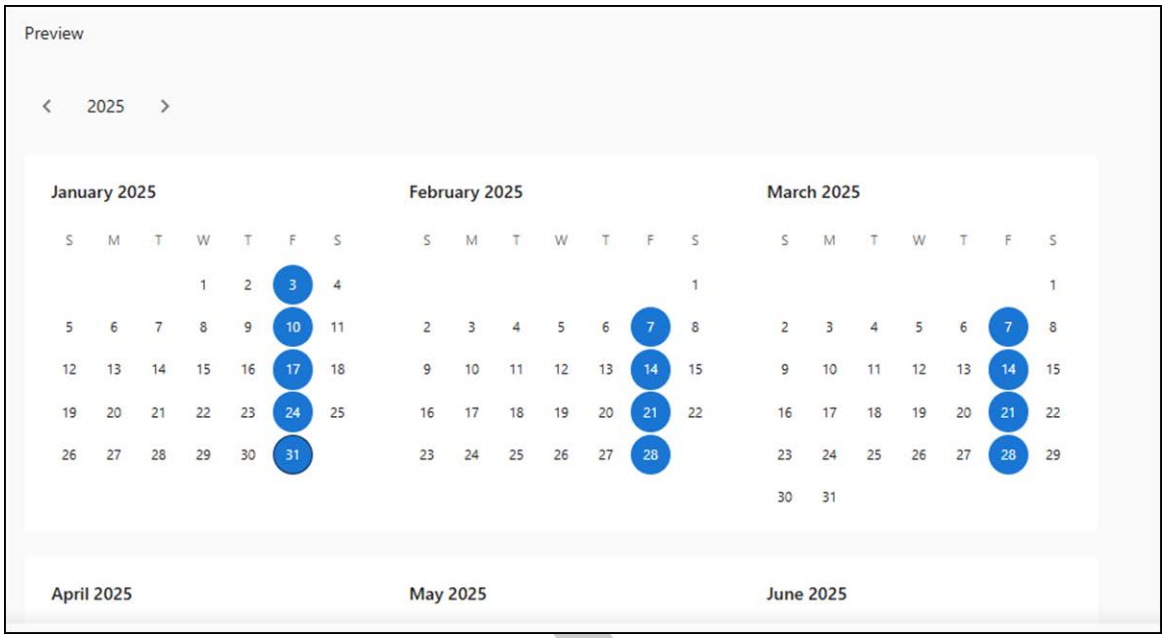
   Every week — Used for weekly payrolls.



Payroll calendar options

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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**.

DRAFT

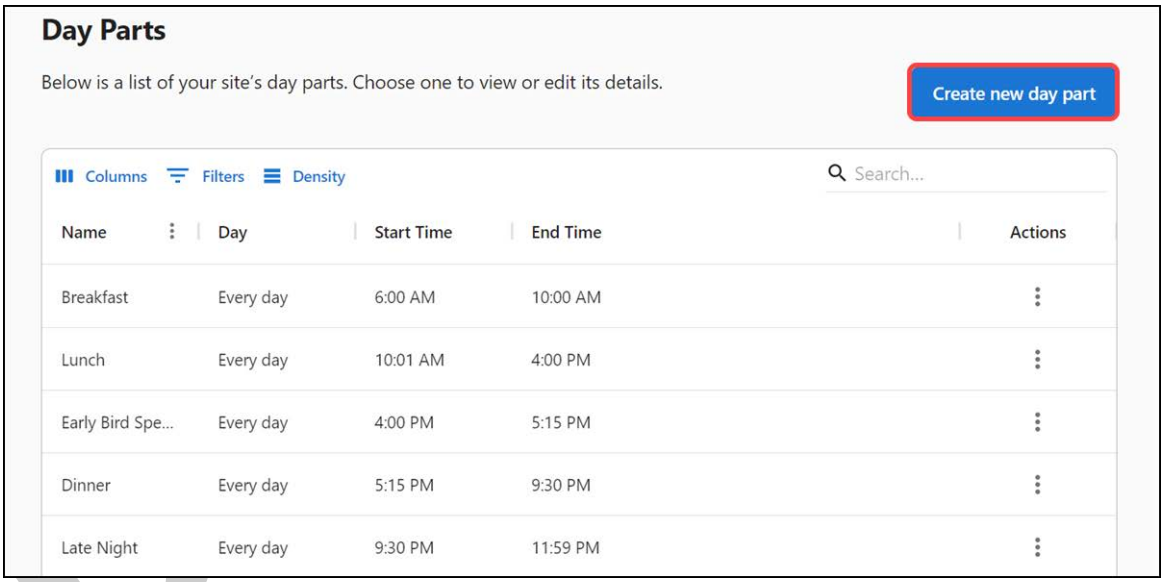
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

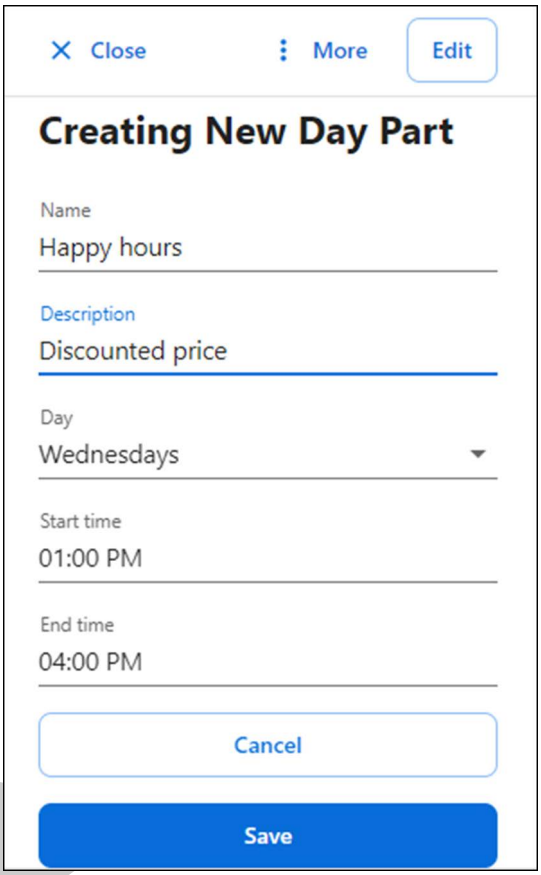


Creating a day part

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



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.

DR

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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:

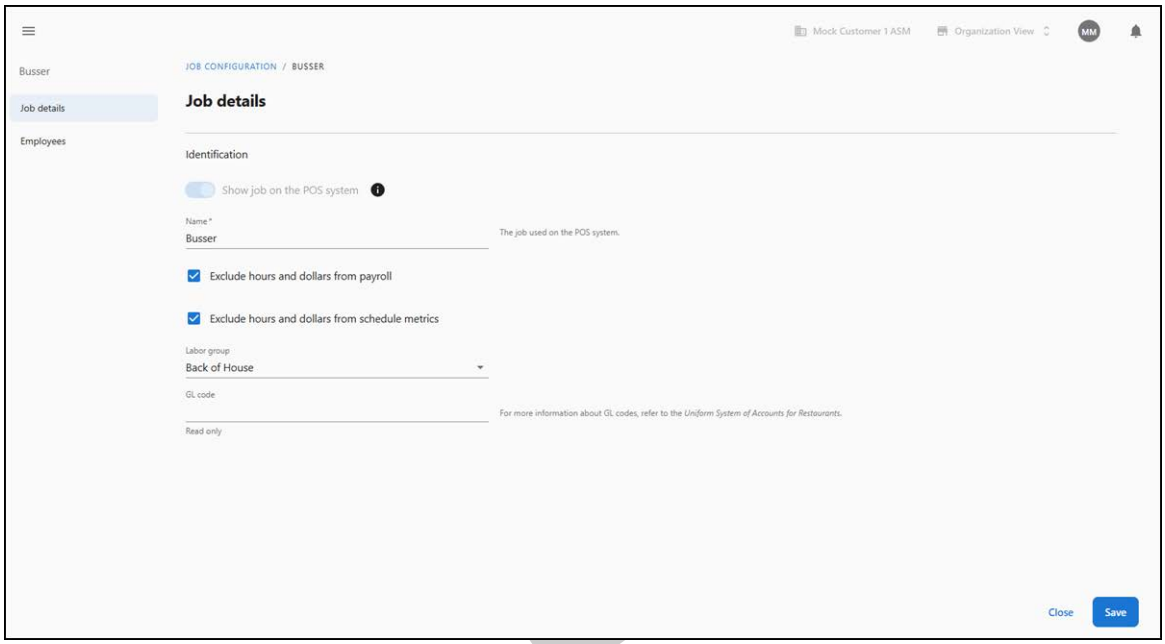
1. Select **Settings > Labor settings > Job configuration.** The 'Job configuration' screen appears.

'Job configuration' screen

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



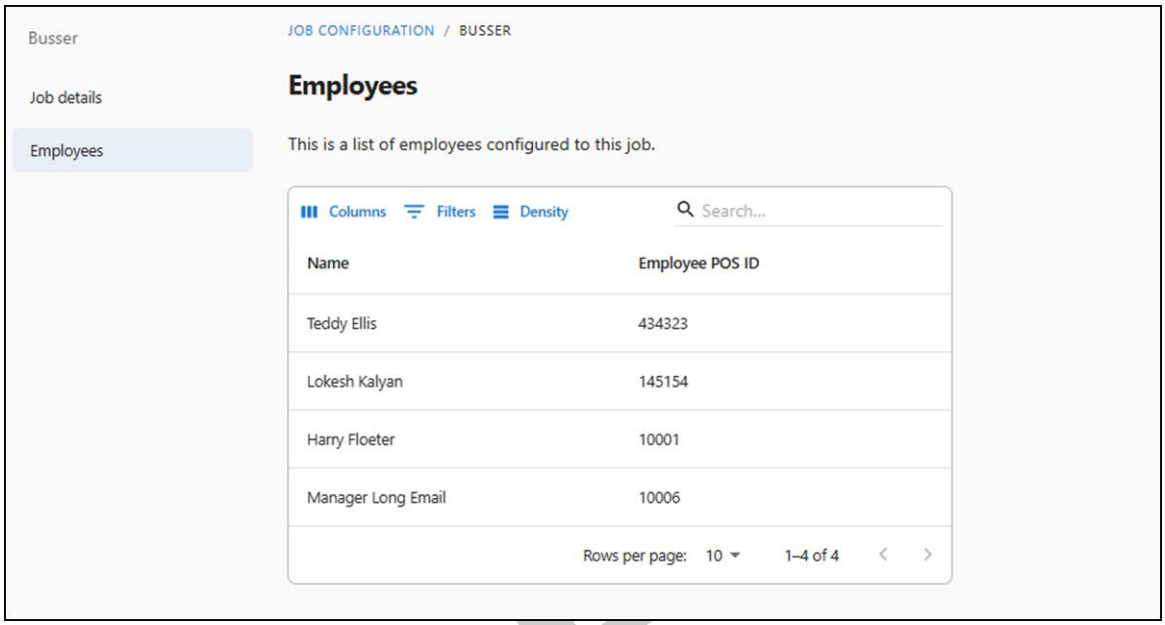
'Job details' screen

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**.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



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.

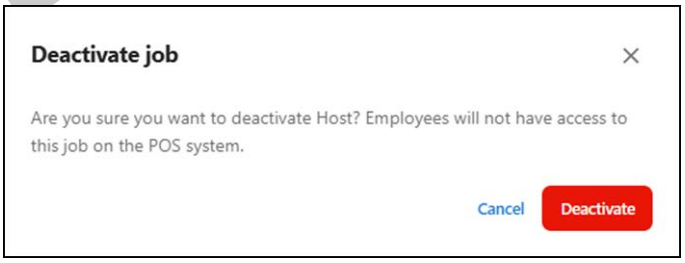
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

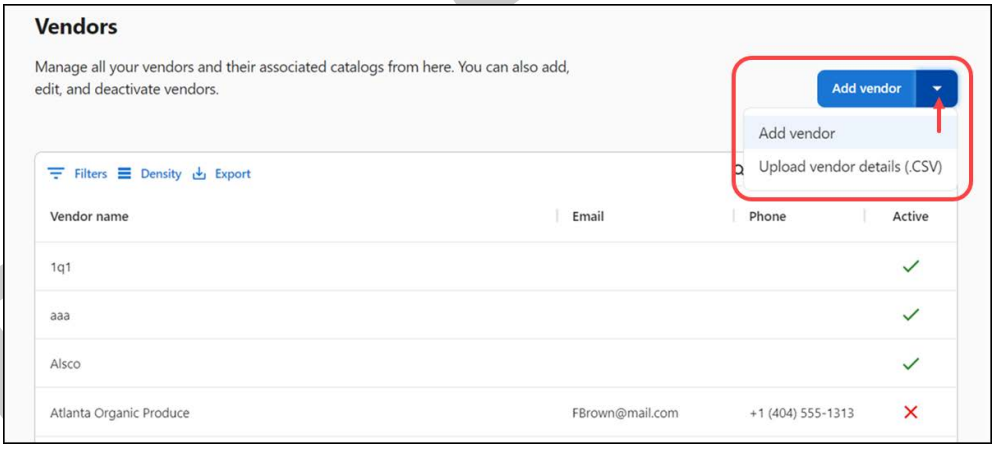
DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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:

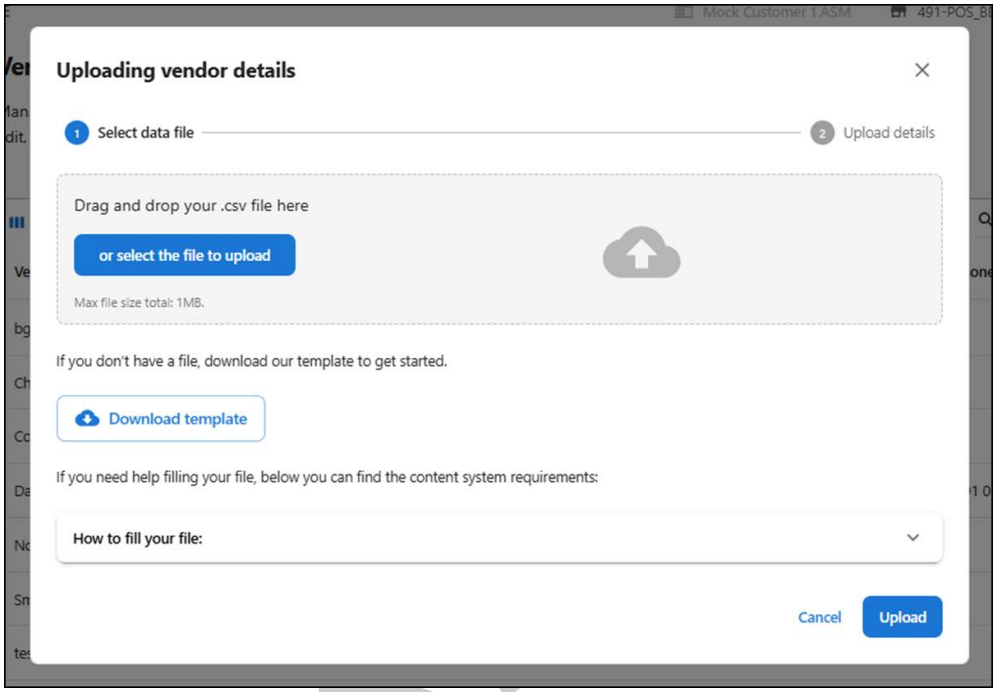
1. Select **Inventory** > **Vendors**. The 'Vendors' screen appears.



Add vendors in bulk

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



'Uploading vendor details' screen

3. Click **Download template**. The file automatically downloads vendor_data_import.CSV.
4. Click the **How to fill your file** drop-down to expose instructions for completing the spreadsheet.
5. 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 Na	A/P Code	Country	Address 1	Address/S	City	State	Postal cod	Contact na	Contact tit	Country cc	Phone nur	Email add	Customer	Comments	
2	Mark	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@test6	123456	This is comments	
3	John	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@test7	123456	This is comments	
4	Francis	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@test8	123456	This is comments	
5																

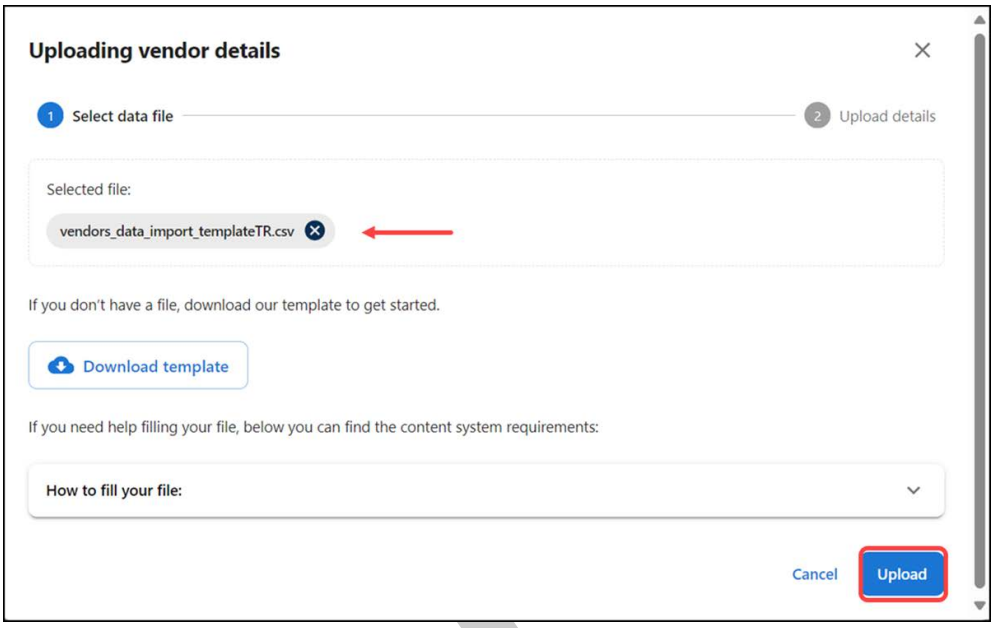
Adding vendor information in bulk

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

DRAFT

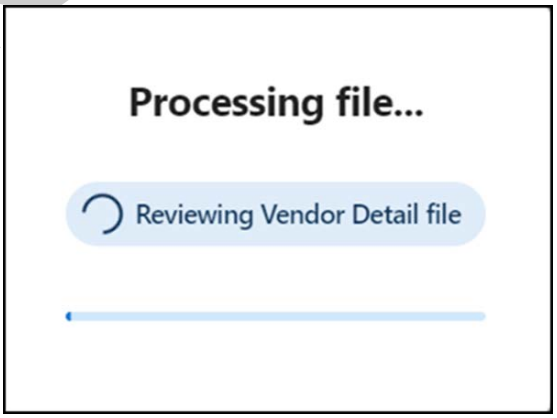
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

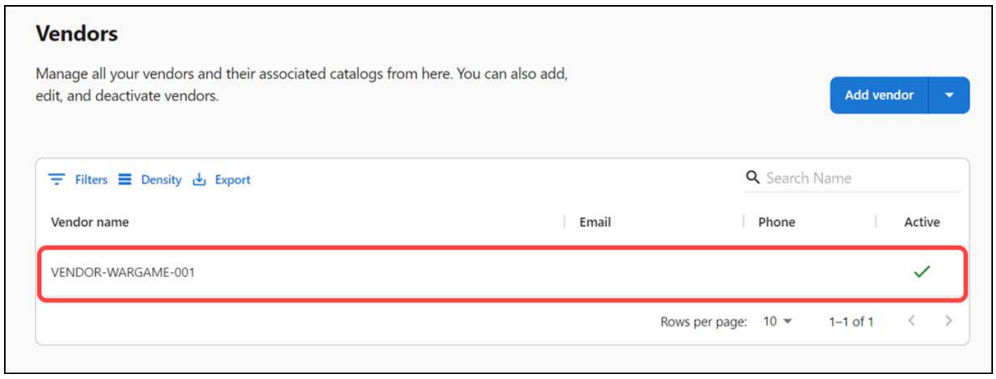
Column	Column name	Description
Column D	Pack	The number of packs within the vendor item container. This field must be a numeric value from 1-999 and can include decimals with up to two decimal points. This is a required field.
Column E	Size	The amount or size of every unit inside each pack, such as 16 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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

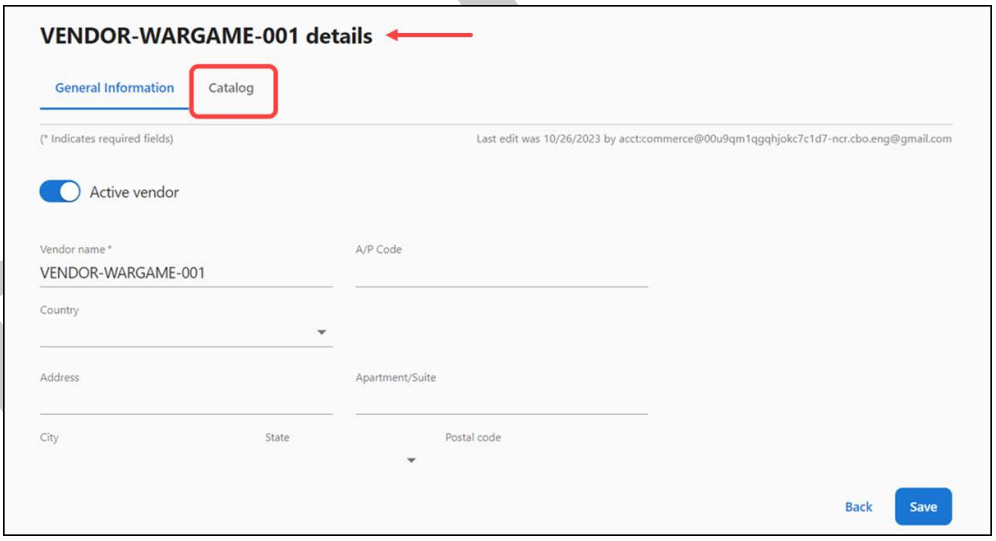
To upload vendor items in bulk:

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



'Vendors' screen

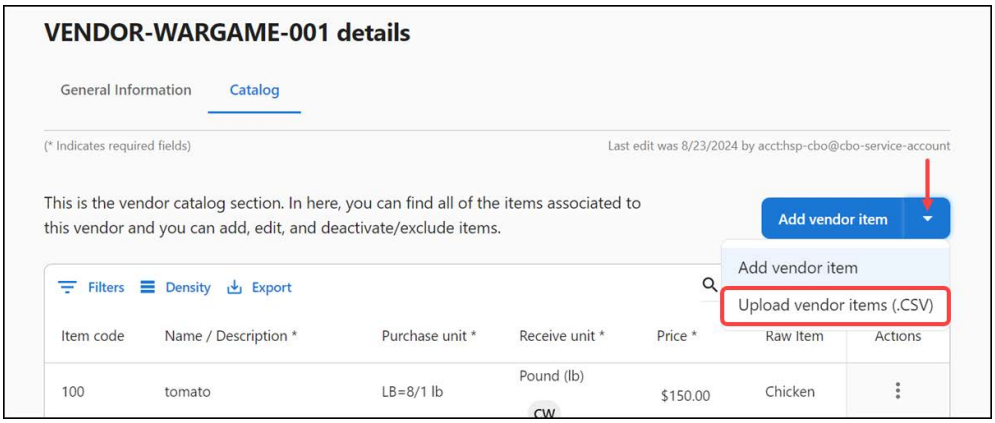
2. Select the **vendor** for which to upload vendor items in bulk. The vendor details appear with the 'General information' tab as the active tab.



'General information' tab

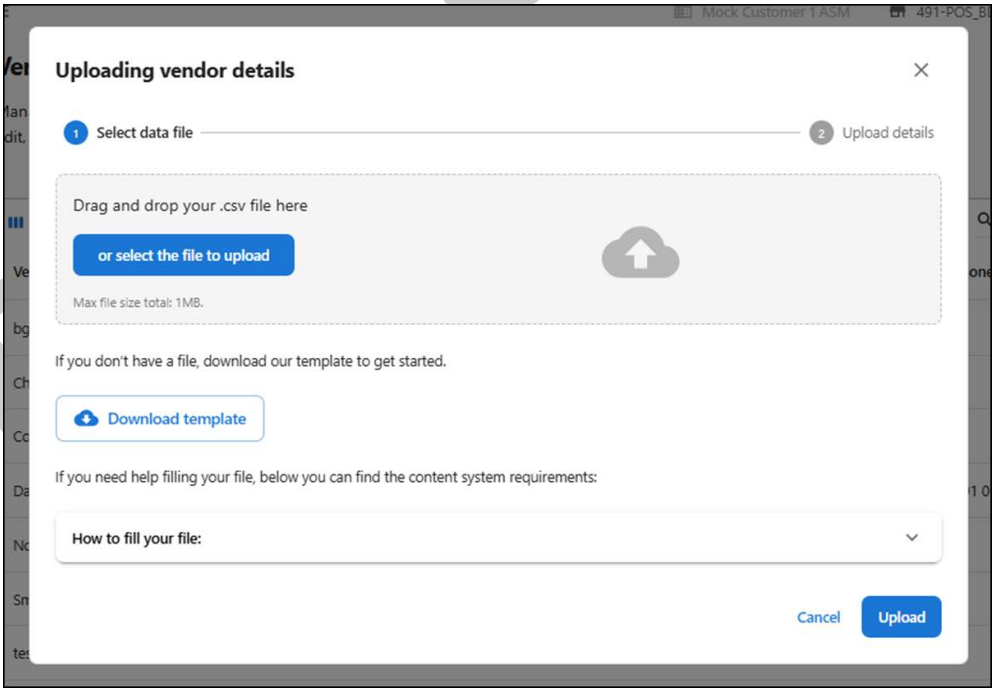
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

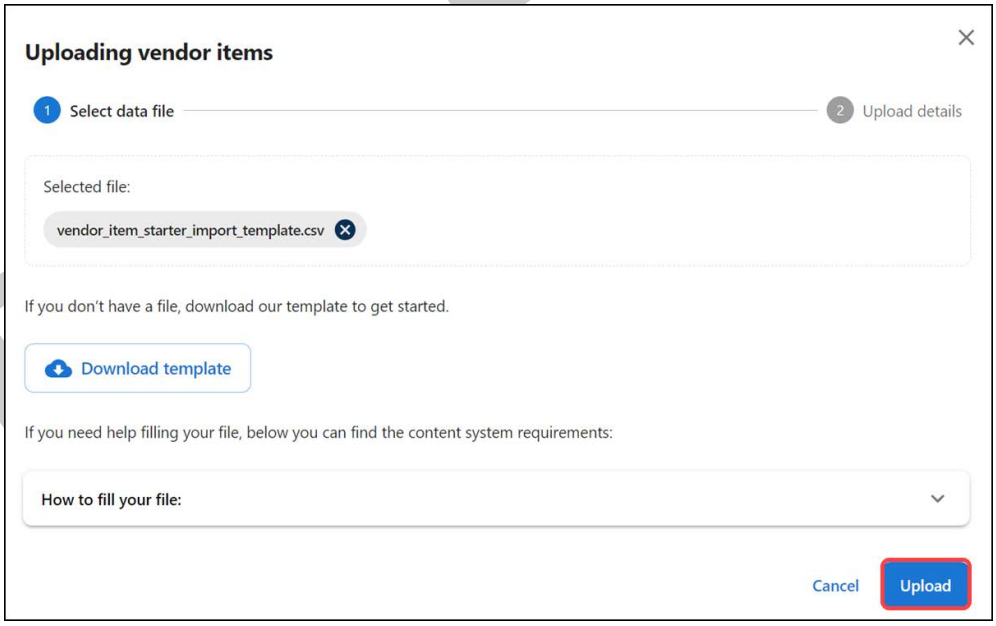
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

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

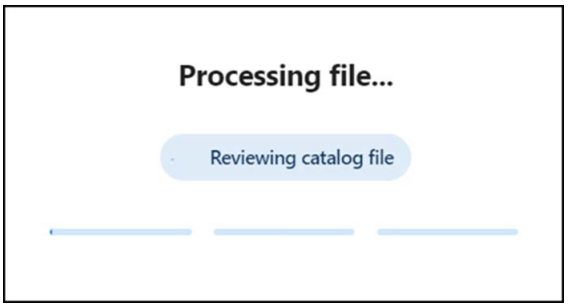
8. Perform **one** of the following actions to upload the .CSV file:
   a. Drag and drop the **file** containing the vendor item details.
      -OR-
   b. Click **or select file to upload**, browse to and select the **file** to upload, and click **Open** to upload the complete the upload.
9. Click **Upload**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



Selecting vendors items file list

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

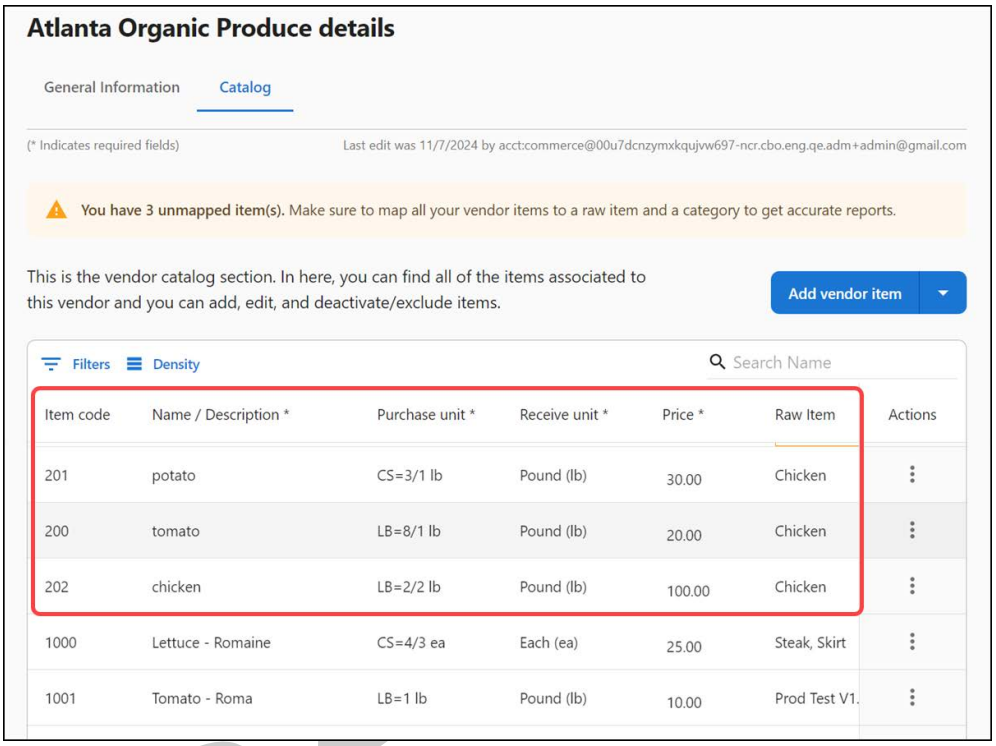
Bulk upload summary

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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



Vendor items successful upload

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.

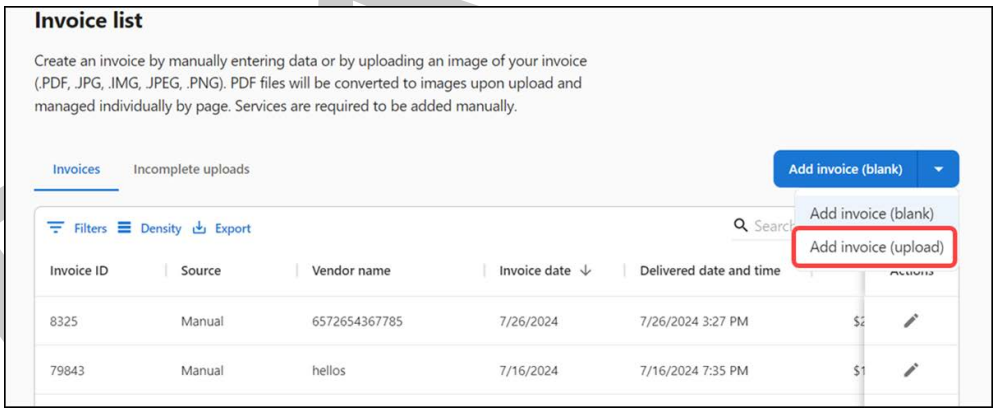
Tip

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.



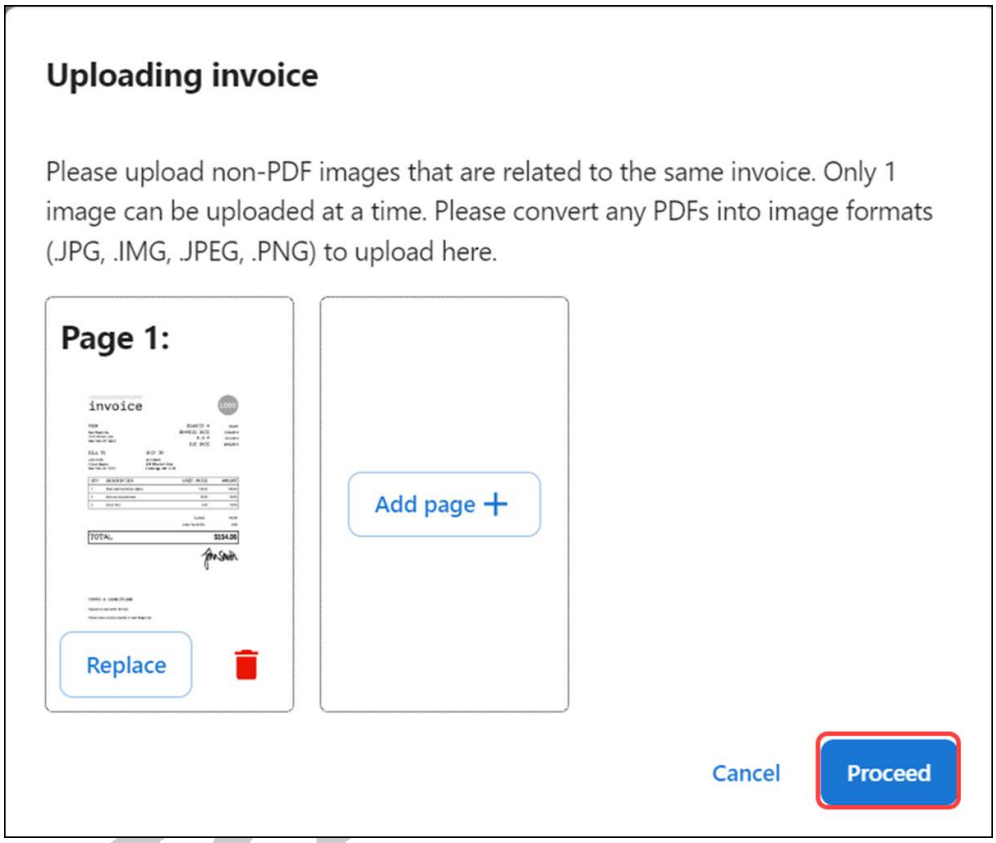
'Invoice list' screen

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

DRAFT

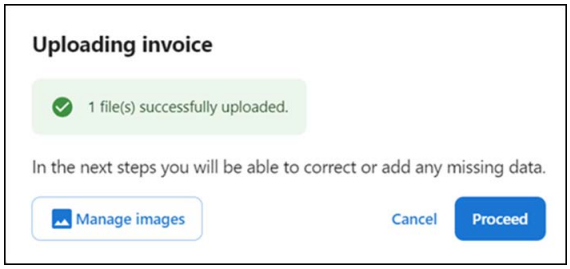
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



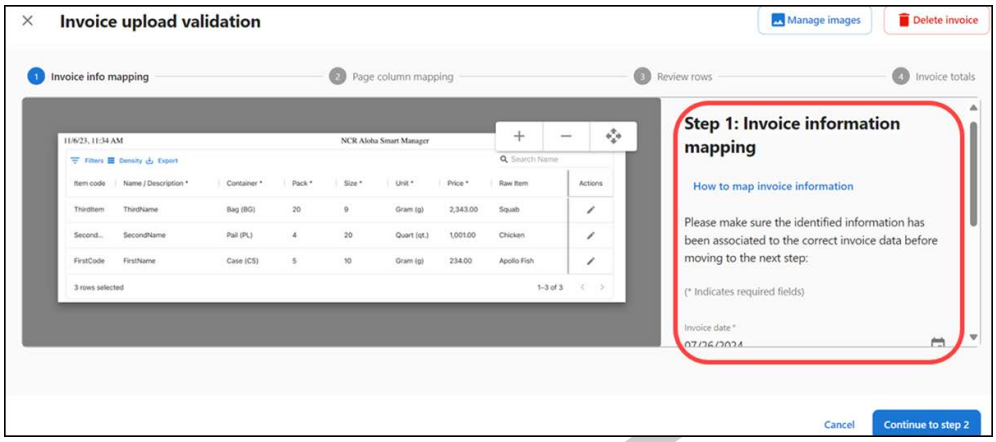
'Uploading invoice' success message

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

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

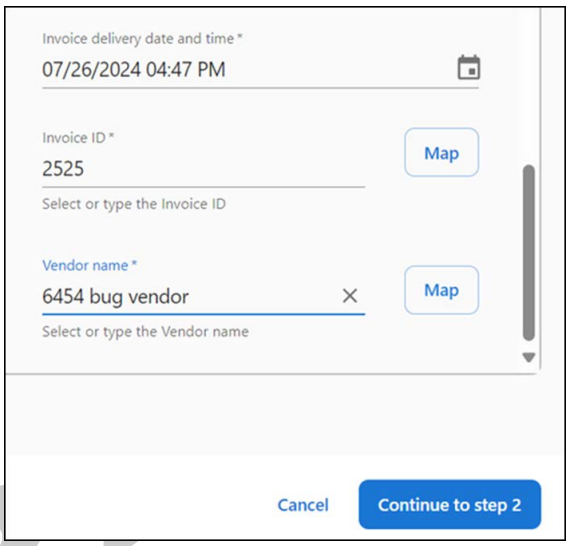
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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.



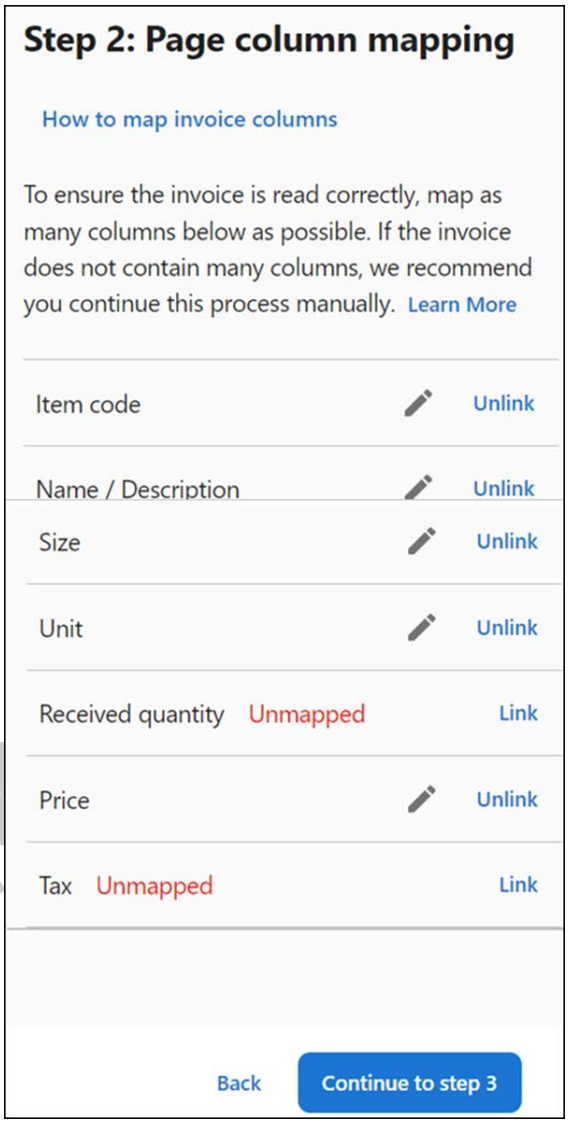
Adding mapping details

   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?)

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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



'Page column mapping' screen

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

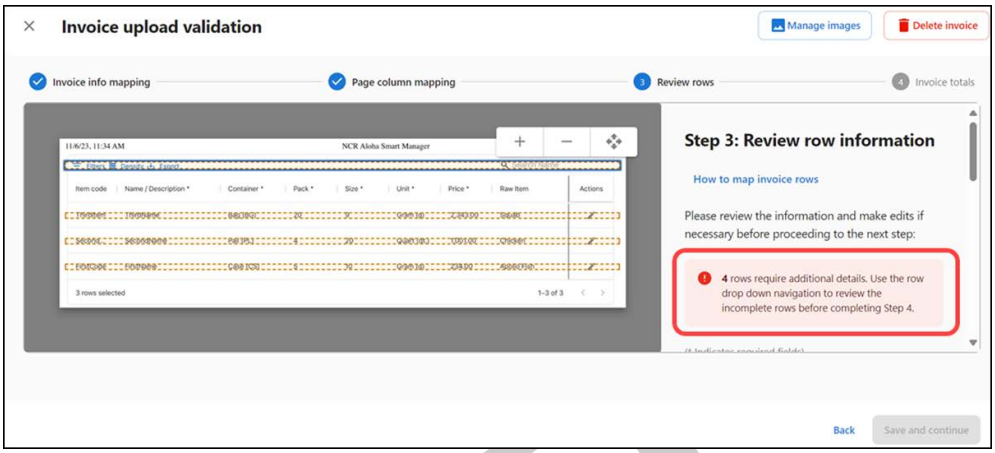
Step 2: Page column mapping

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

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

DRAFT

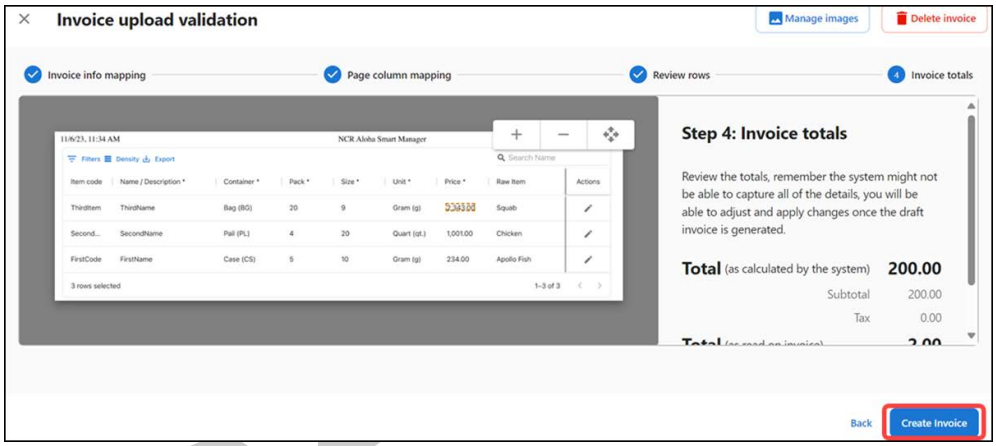
© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

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

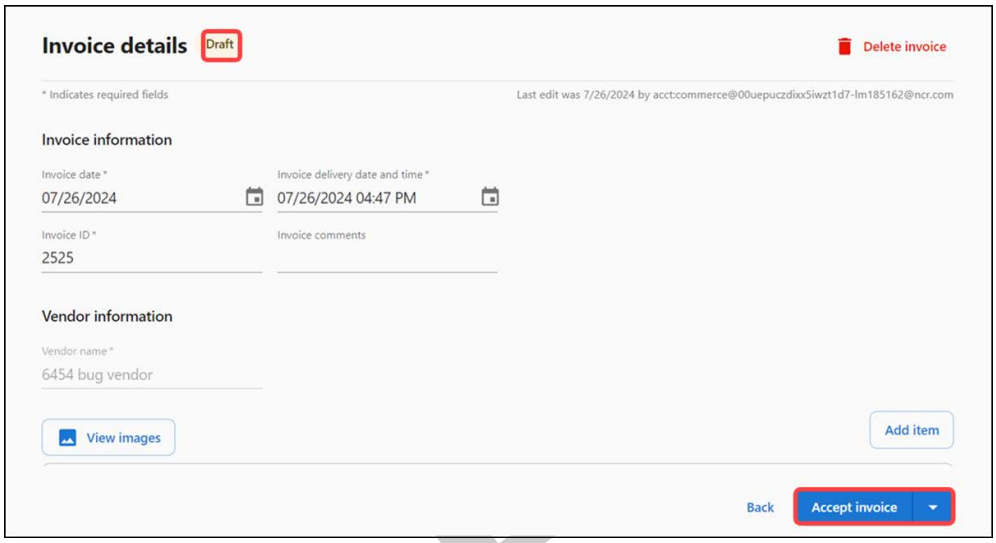
3. Continue to the **next procedure**.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Step 4: Invoice totals

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



'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.

DRAFT

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions

Aloha Smart Manager, Starter User Guide

NCR Voyix welcomes your feedback on this document. Your comments can be of great value in helping us improve our information products. Please contact us using the following email address: Documentation.HSR@NCRVoyix.com

DRAFT

NCR VOYIX

© 2025 NCR Voyix. All rights reserved. NCR Voyix — Confidential
Use and Disclose Solely Pursuant to Company Instructions