



Aloha Smart Manager Getting Started Guide

Last Updated: April 21, 2025

About Aloha Smart Manager

Welcome to Aloha[®] Smart Manager (ASM), 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.

ASM offers a wide range of powerful features to run specific areas of your restaurant from a central location in the cloud. This guide helps with the very basic requirements and steps to get you started with ASM. The information allows you to lay the groundwork to implement more advanced features and allow ASM to work for you.



Reference

Refer to the [Aloha Smart Manager Starter User Guide](#) for more information on configuring Aloha Smart Manager.

Validating system defaults to accommodate your business needs

Visit the following areas to ensure the configuration meets your needs.

Fiscal Calendar - In ASM, select **Settings > Organization settings > Fiscal calendar**. The fiscal calendar defaults to the first full week of January of the current year and with a 4-4-5 quarterly style calendar. Adjust the default settings accordingly.

Payroll Calendar - In ASM, select **Settings > Site settings > Payroll calendar**. The payroll calendar defaults to the start of the first full week of January of the current year and with a weekly payroll frequency. Adjust the default settings accordingly.

Day Parts - In ASM, select **Settings > Site settings > Day parts**. The day parts default to the following time frames. Adjust the default time frames accordingly.

Default day parts	
Breakfast, every day, 4:00 a.m.–10:00 a.m.	Dinner, every day, 4:00 p.m.–9:00 p.m.
Lunch, every day, 10:00 a.m.–4:00 p.m.	Late Night, every day, 9:00 p.m.–11:59 p.m.

Jobs - In ASM, select **Settings > Labor settings > Job Configuration**. Review the default jobs and deactivate any unneeded jobs so a manager cannot assign them when hiring an employee.

Default jobs		
Assistant Manager	Cashier	FOH Trainer
Bartender	Cocktail	Host
BOH Team Member	Cook	Manager
BOH Trainer	Dishwasher	Server
Busser	FOH Team Member	

Adding users

Before you begin, gather the following required information to complete the configuration steps for adding users.

- First and last name of the user.
- Email address of the user.
- Role the user will have in your company.
- Restaurant to which the user has access or work in your company.
- Job and pay rate of the employee if the user will work in a restaurant and use the Point-of-Sale (POS).

To add a user:

1. In ASM, select **Aloha Smart Manager** in the top-left corner of the screen, and select **Identity** from the list of applications in the pop-up menu that appears. You are redirected to the Identity app.
2. Click **Users > Create new users**.



Reference

Refer to the [Identity Management Quickstart Guide](#) for more information on the Identity app.

3. Enter the **first** and **last name** of the user and a valid **email address**.



Important

If the email address you enter here is not valid, the user will never receive the email and will not be able to complete the process. You must delete the user account and start over.

4. Use the options under the 'Permissions' group bar to select **one role** to apply to all hosted applications or assign a **specific role** the user is to perform for each hosted application.
5. Use the options under the 'Location access' group bar to select the **site(s)** the user can access.
6. Use the 'Local device login' group bar to assign a unique **PIN** for the user to use when logging in to the POS.
7. Click **Create user**.

Users for the Identity administrator to create:

- Add the Identity Application Admin users. These people manage all users in your company. Add a minimum of two so there is a backup administrator.
- Add the ASM Application Admin users. These people manage your Aloha Smart Manager (ASM) configuration, which includes Vendor Catalog, Site Settings, Raw Items, and more. Add a minimum of two so there is a backup administrator.
- Add the ASM Support users. These people need reporting and read-only access to Aloha Smart Manager; however, they do not need to perform day-to-day processes in ASM, such as hiring or scheduling at the restaurant.

Users for the ASM Application Admin or ASM Manager to create:

- Add the ASM Manager and Assistant Manager users. These people manage your restaurants, enter new employees, schedule employees, and enter invoices in to ASM for their restaurant.
- Add the Employee users. These people are the hourly employees that work at the restaurant and need access to the POS for timekeeping and entering orders. They are included in the ASM employee schedule, for timekeeping and labor reports and have access to view their scheduled shifts in ASM on the employee website.

All users need to do the following:

Newly-added users receive an email from no-reply@ncrvoyix.com that informs them they have access to Aloha Smart Manager and with a link to set up their account.

The ASM Manager, Assistant Managers, and Employee users must click the link in the email, complete the setup process and navigate to Aloha Smart Manager from the Home page.

Additional tasks for managers for the ASM application need to perform the following:

Once the ASM Manager, Assistant Manager, or employee sets up their user account, and have logged into 'home,' the manager can then see the user in the Labor > Employees function. A caution symbol appears next to their name in the list of employees on the Active tab indicating additional steps are required.

To complete new user creation:

1. In ASM, select **Labor > Employees**.
2. Click the **caution icon** next to the employee name to access the employee profile.
3. Select the **Jobs** tab.
4. Click the **pencil icon** at the right end of the Jobs group bar.
5. Click **Add job**.
6. Select the **job(s)** and corresponding **payrate** to assign to the user, and click the **save icon** next to the job. The new user appears active in the list.

To assign a local device login for POS employees:

1. Log in to **Aloha Cloud Back Office**.
2. Navigate to the **Employees** function.
3. Select the **employee**.
4. Select **Change PIN**.
5. Type the **PIN** the employee uses to log in to the POS.
6. Notify the **employee** of their PIN number so they can log in, perform timekeeping, and enter orders, as their job permits.

□ Creating employee schedules

1. In ASM, select **Labor > Schedule**.
2. Select an existing **schedule** or use the **Copy Schedule** function.
3. Add the **shifts** you want to schedule for the week for each employee.
4. When you are finished with a schedule, click **Publish** in the top right corner. Employees can view the schedule on the ASM Employee website.



Tip

If you need to return to a partially completed schedule, save the schedule without publishing. Employees cannot view the schedule until you click 'Publish.'

□ Setting up vendor catalogs

You can set up your vendor catalog (items the restaurant purchases from the vendor), using any of the following methods:

- Method #1: Add the vendor and import their catalog.
- Method #2: Scan vendor invoices and allow the system to set up the vendor and vendor items automatically.
- Method #3: Manually add the vendor and their vendor items.

Method #1 – Add the vendor and import their catalog

1. In ASM, select **Inventory > Vendors**.
2. Click the **Add vendor** drop-down list and select **Upload vendor details (.csv)**.
3. Click **Download Template** to download vendor_data_import.csv.
4. Open **vendor_data_import.csv** and populate with the following **information**:

Vendor_data_import.csv information (by column order)		
Vendor Name* (required)	City	Country code
A/P Code	State	Phone number
Country	Postal code	Email address
Address 1	Contact name	Customer account number
Address/Suite	Contact title	Comments

5. Save **vendor_data_import.csv**.
6. In ASM, select **Inventory > Vendors**.
7. Click the **Add vendor** drop-down list and select **Upload vendor details (.csv)**.
8. Drag and drop your populated **vendor_data_import_template.csv** into the **upload box** or click the **select the file to upload button** and select your populated **vendor_data_import_template.csv**.

Method #2 - Scan vendor invoices and allow the system set up the vendor and its vendor items automatically

1. In ASM, select **Inventory > Invoices**.
2. Click the **Add invoice** drop-down list and select **Add invoice (upload)**.
3. Select a **PDF** or **image** from the directory.
4. Select **Upload from Mobile**.
5. Follow the provided **steps** in the ASM application to verify the invoice upload. The system adds the vendor and vendor items to create your vendor catalog as you add each new invoice.

Method #3 - Manually add the vendor and their vendor items

1. In ASM, select **Inventory > Invoices**.
2. Select **Add invoice (blank)**.
3. Enter the invoice detail **information**.
4. Add the **invoice items**. The system adds the vendor and vendor items to create your vendor catalog as you add each new invoice.

Setting up raw materials

As you create each new vendor item, associate a raw item with it to make invoice reporting easier when you have multiple vendor items that represent the same raw item ingredient.

1. In ASM, select **Inventory > Raw Items**.
2. Click **Create Item**.
3. Add the **raw item Name**.
4. Select the **raw item category**.
5. Assign the **vendor items** to the raw item.
6. Save the **raw Item**.

What's next?

Congratulations! You completed the steps deemed essential to getting started with Aloha Smart Manager. You can repeat these procedures during your everyday business when you add new employees, schedules, vendors, vendor items, and raw items. Depending on your role in the company and the permissions allowed in the application, the next step is to advance your knowledge and learn about the more complex features inside ASM. The more you are empowered, the more you can make ASM work for you as a cohesive component to your business. Thank you for choosing Aloha Smart Manager.



Reference

Refer to the [Aloha Smart Manager Starter User Guide](#) for more information on configuring Aloha Smart Manager. For all other concerns, contact your NCR Voyix representative.