

Aloha Smart Manager v1.16 Starter User Guide

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DRAFT

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Getting Started with Aloha Smart Manager

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

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

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

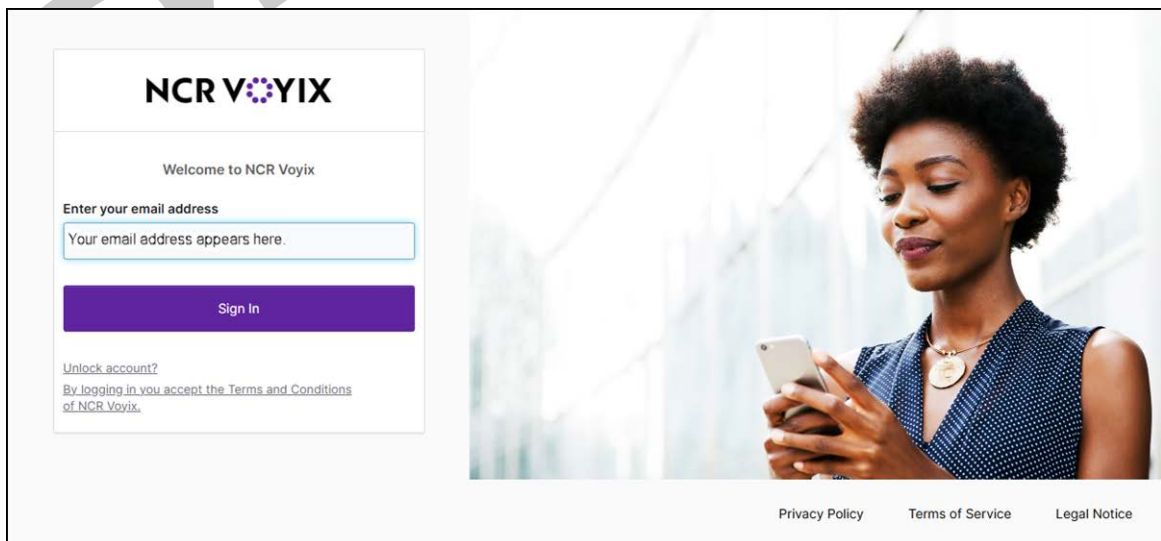
Sales Management — Track key restaurant sales metrics through a core set of reports, run a profit and loss statement for a view of restaurant profitability, view and reprint POS transactions, reconcile shift and daily cash transactions.

Signing in and logging out of Aloha Smart Manager

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

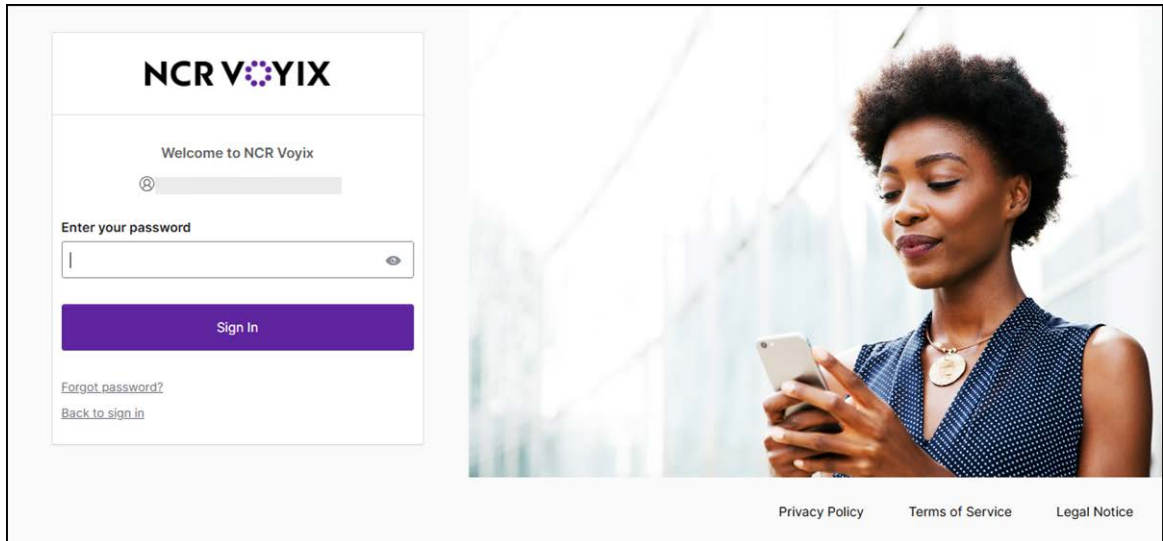
To sign in to ASM:

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



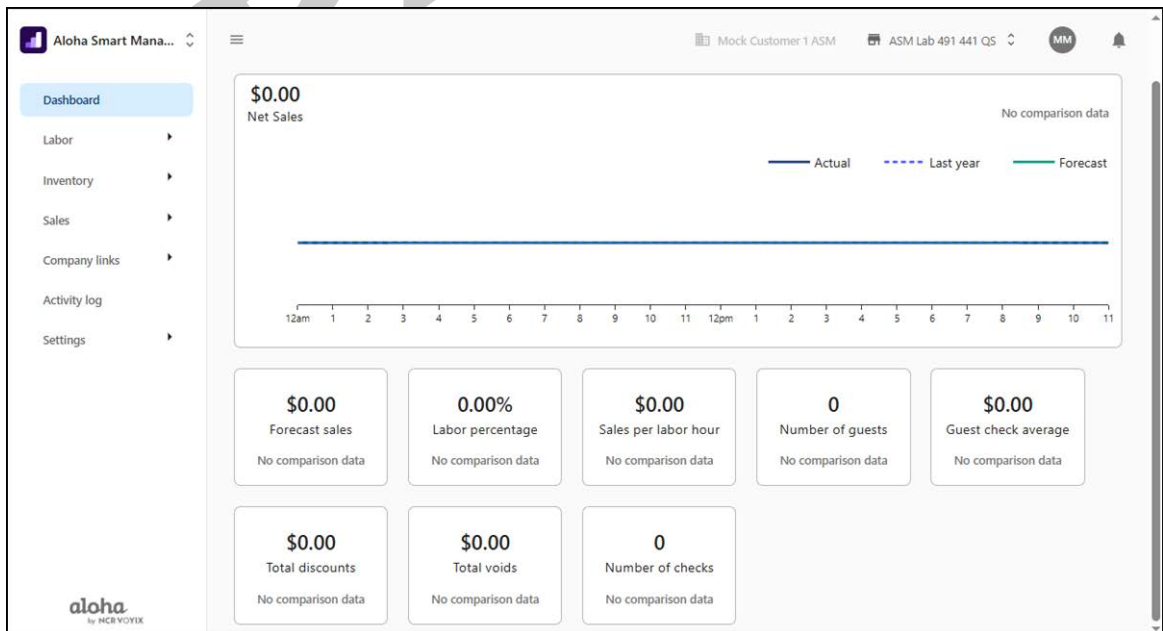
Welcome to NCR Voyix email address entry screen

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



Welcome to NCR Voyix password entry screen

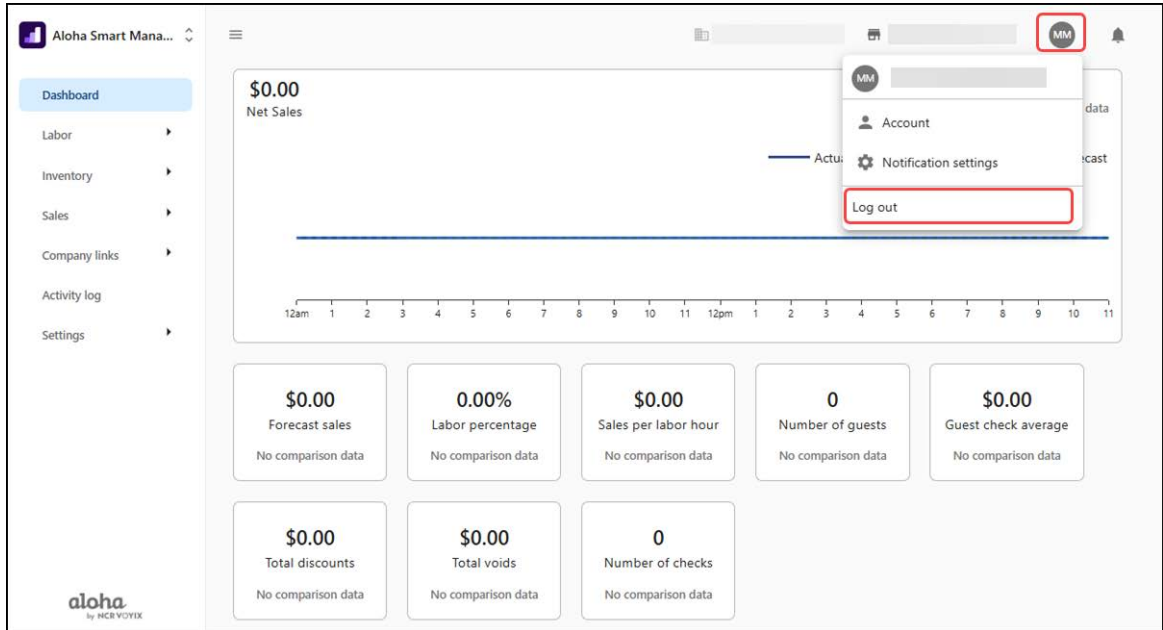
3. Type your **password** and click **Sign In**. Aloha Smart Manager opens to the landing page with the store mapped to your account appearing in the top right corner and the dashboard appearing on the screen, if available for your user profile.



ASM landing page

To log out of ASM:

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



Logging out of ASM

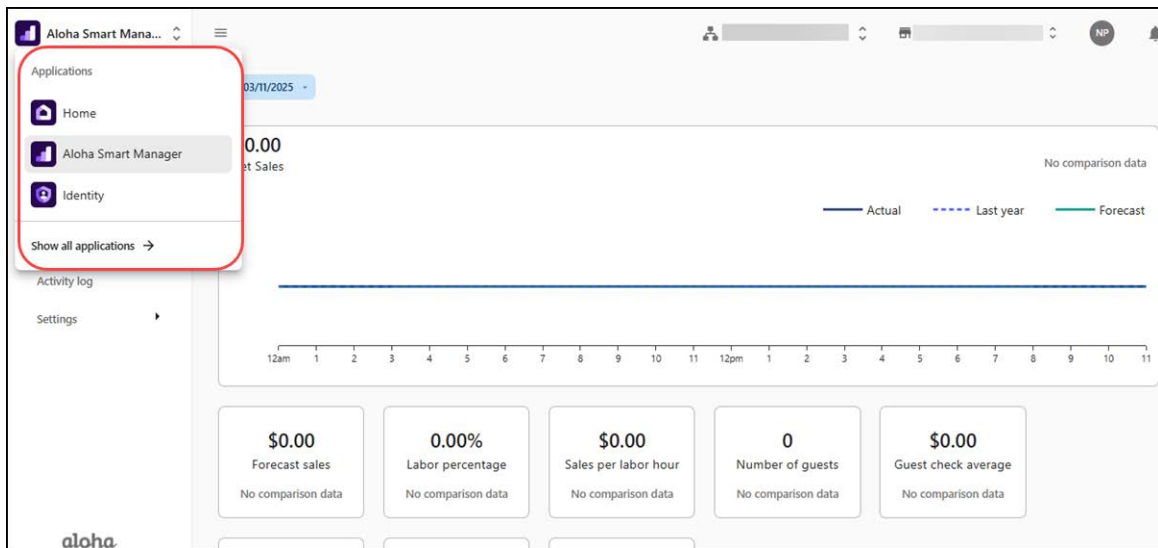
2. Click **Log out**.

Switching between apps

Located in the top left corner of the ASM landing page is an app switcher that allows you to easily switch between all NCR Voyix applications to which you have been assigned through Identity.

To use the app switcher to switch between applications:

1. Click **Aloha Smart Manager** in the top left corner of the screen to see the list of applications available to you.

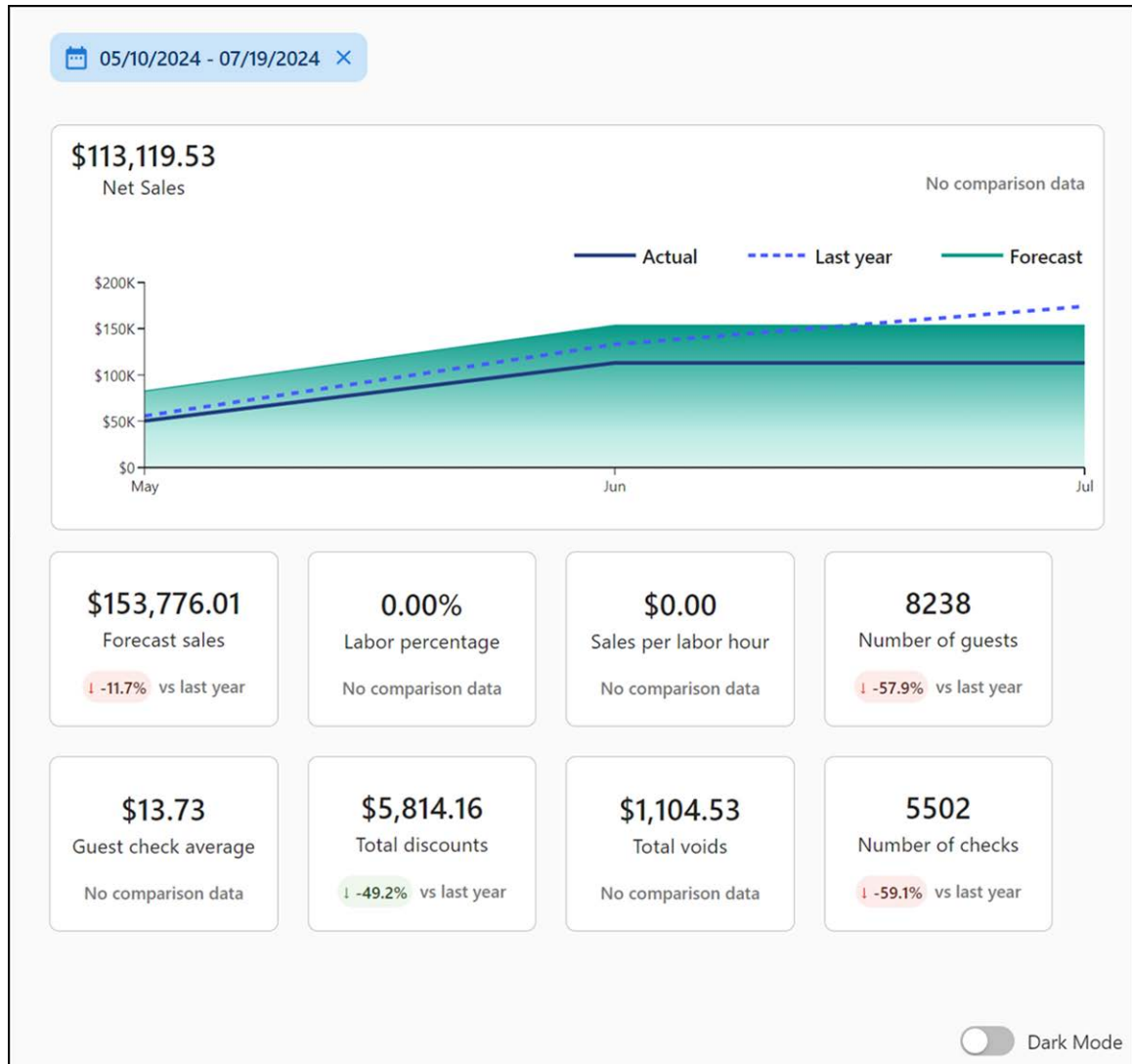


Switching apps

2. Select the **application** to access from the list or click **Show all applications** to expand the list and display all applications available to you. You are automatically redirected to the selected application.

Working with the dashboard

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



ASM dashboard

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

Widget	Purpose
Forecast sales	View the sales forecast in detail. Note: This widget is not interactive in this release.
Labor percentage	View the labor percentage for the selected site. Select this widget to navigate to the 'Shift tracker' function.
Sales per labor hours	View the sales per labor hour for the selected site. Select this widget to navigate to the 'Shift tracker' function.
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.

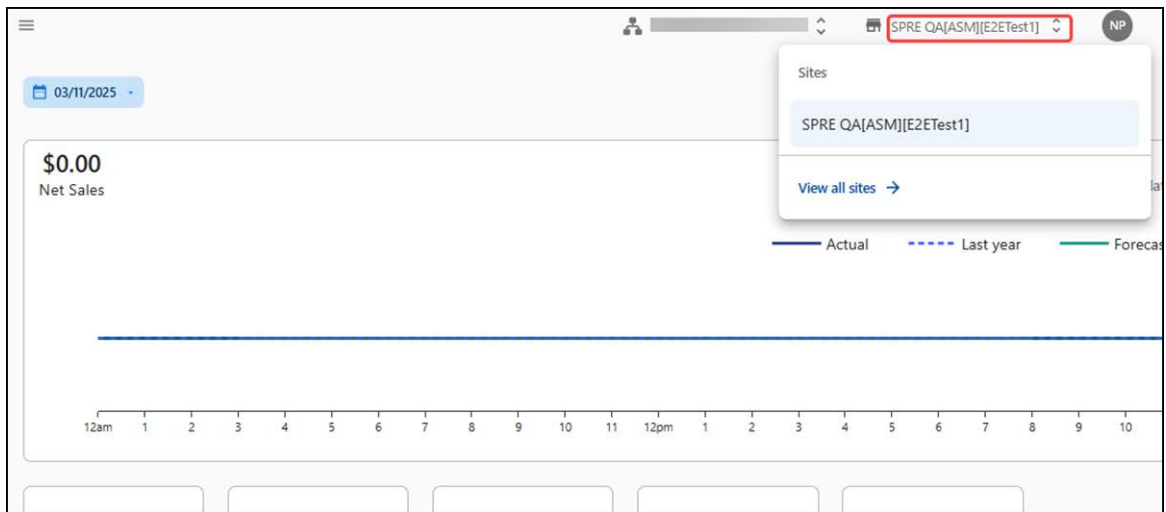
To change the dates to view on the dashboard:

1. With the dashboard active on the screen, select the **start** and **end dates to view**. 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.
2. Click **Done**. The screen refreshes to reflect the data for the selected dates.

Changing the site

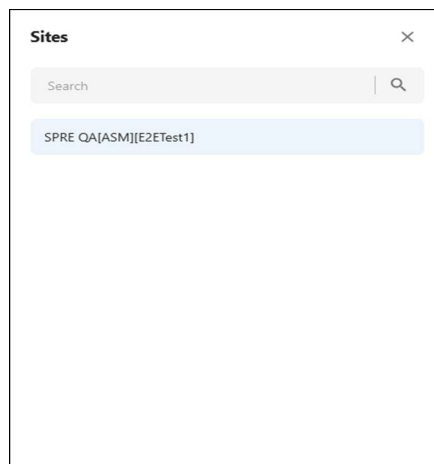
The dashboard displays for the default site assigned to you. If you use a multi-store account, you can easily switch from one site to another to view data and perform tasks within that site.

1. With the dashboard active on the screen, click the displayed **site**. The 'Sites' popup appears with the currently selected site appearing first in the list.



Switching between sites

2. If needed, click **View all sites**. A 'Sites' search box appears allowing you to search for the **site** you need or select from the **list** that appears.

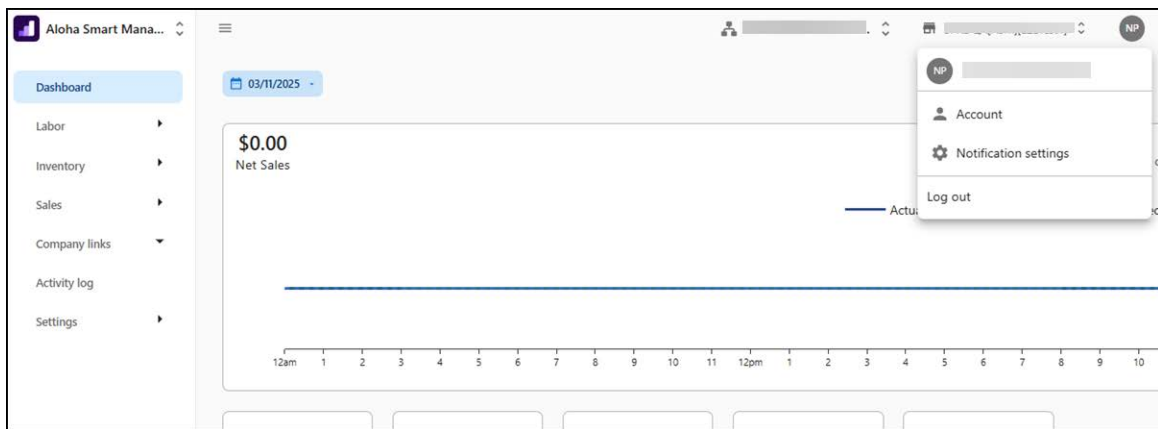


Selecting sites

3. If needed, type the **site name** in 'Search' to narrow the list or select a **site** from the drop-down list. The dashboard refreshes to display the data for the selected site.

Working with your account

When you sign in to ASM, the profile icon appears in the top right corner of the screen, with either Multi-Store (All Stores) or the specific store name you selected appearing. Click the profile icon to access a menu from which you access several options that allow you to control your ASM environment.



ASM profile icon and menu

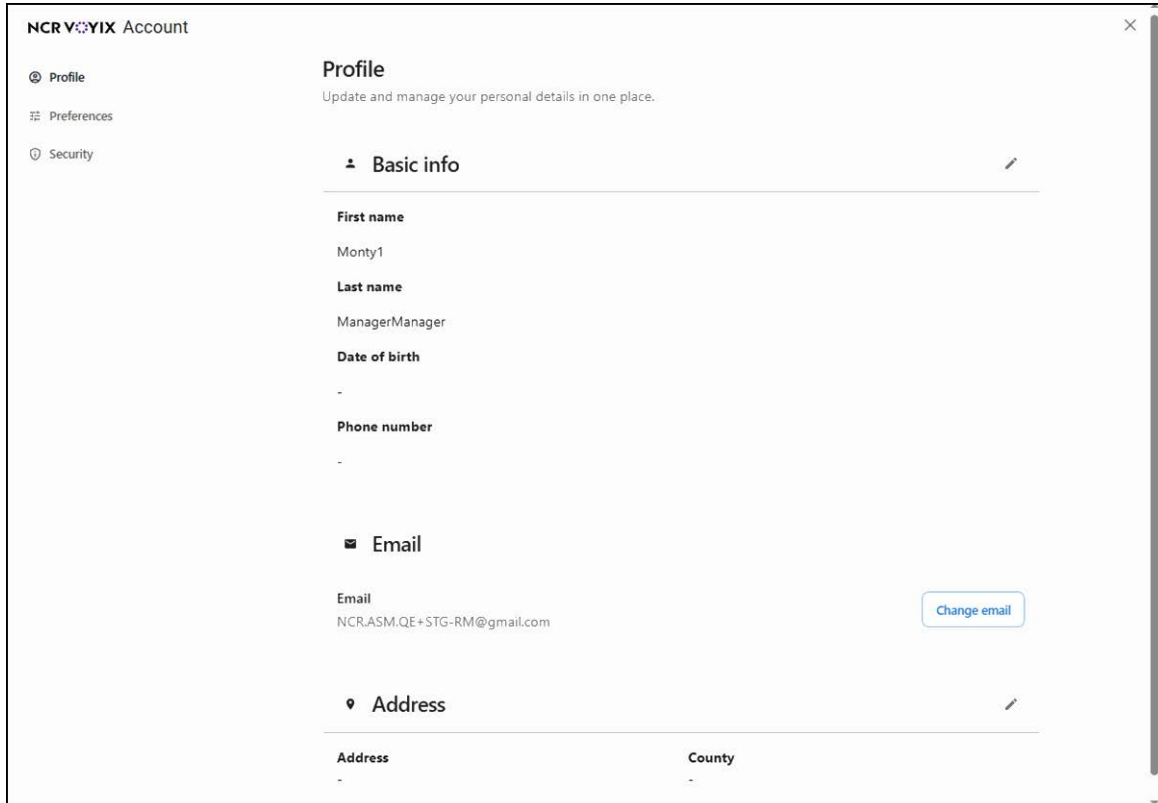
Establishing your account profile, preferences, and login credentials

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.

The Profile screen provides access to three pages: Profile, Preferences, and Security, as shown below. Use the options on these pages to make changes to your first and last name, phone number, email address, display options, login credentials, and more.



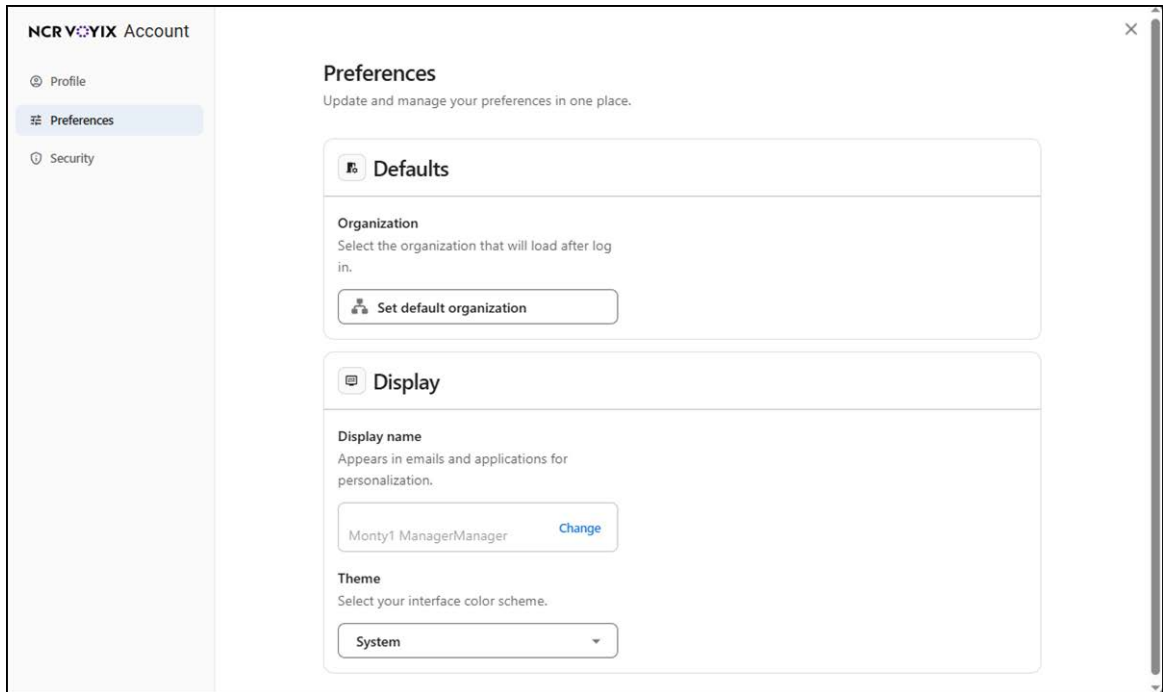
Edit the Profile page

To update your account profile:

1. Click the **profile icon** and select **Account** from the menu that appears.
2. Under the 'Basic info' group bar, click the **pencil icon** to the right and edit the **first name, last name, date of birth,** and **phone number,** then click **Save**.
3. Under the 'Email' group bar, click **Change email** to display a popup screen in which you can change the email address, then click **Submit**.
4. Under the 'Address' group bar, click the **pencil icon** to the right, edit the **address,** then click **Save**.
5. Continue to the **next procedure** or click **X** in the top right corner of the screen to exit the **Account** function.

To update your account preferences:

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

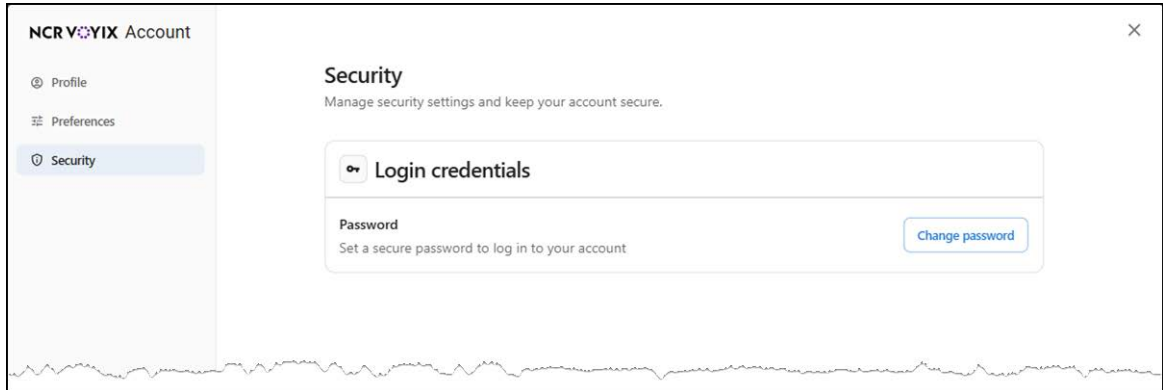


Edit the Preferences page

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

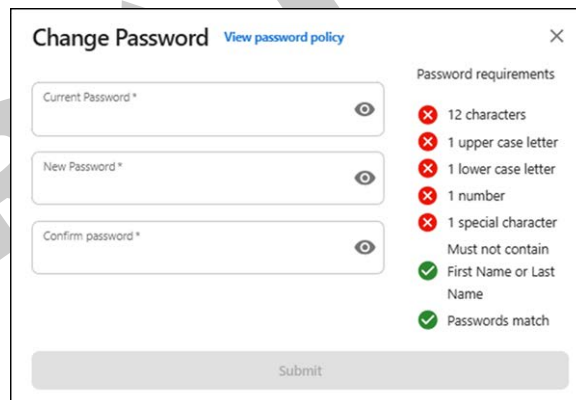
To update the password to use when logging in to ASM:

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



Edit the Security page

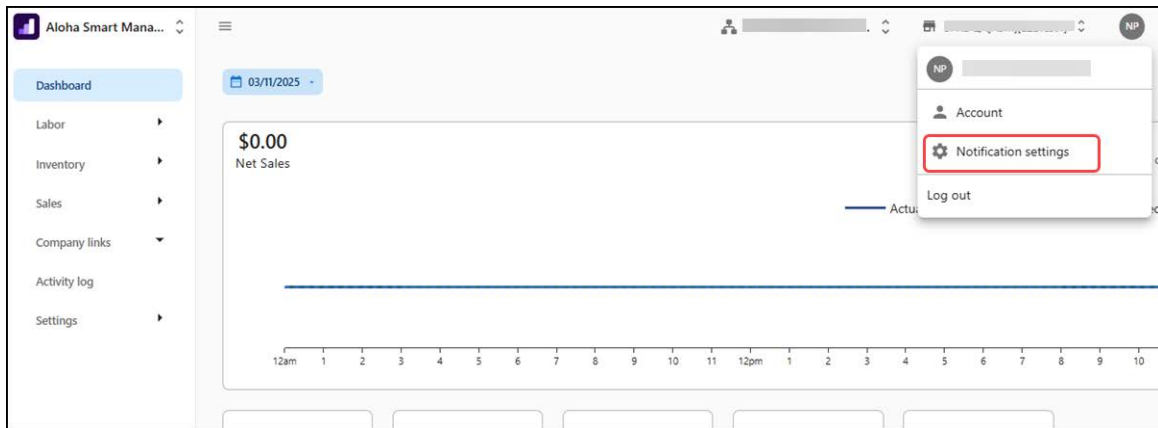
2. Under the Login credentials group bar, click **Change password** to display the Change Password screen.



Change Password screen

3. Type your **current password**.
4. Type your **new password** and then type it again in **Confirm password**.
5. When all password requirements are met, indicated by a green check mark, click **Submit**.
6. Click the **X** in the top right corner of the screen to exit the **Account** function.

Configuring and using notification settings



'Notification settings'

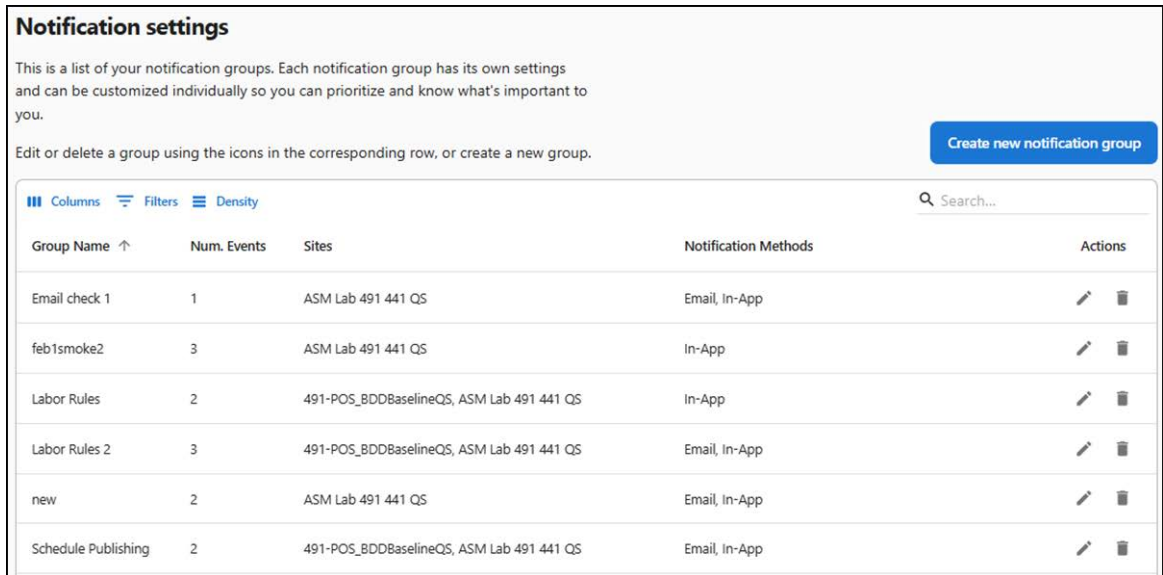
Use 'Notification settings' to create general site notifications that appear to all users at login during the designated time frame. A notification group allows you expedite messages of upcoming events and announcements to select employees without directly interacting with the recipients. Each notification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

Examples of how you can use a notification are:

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

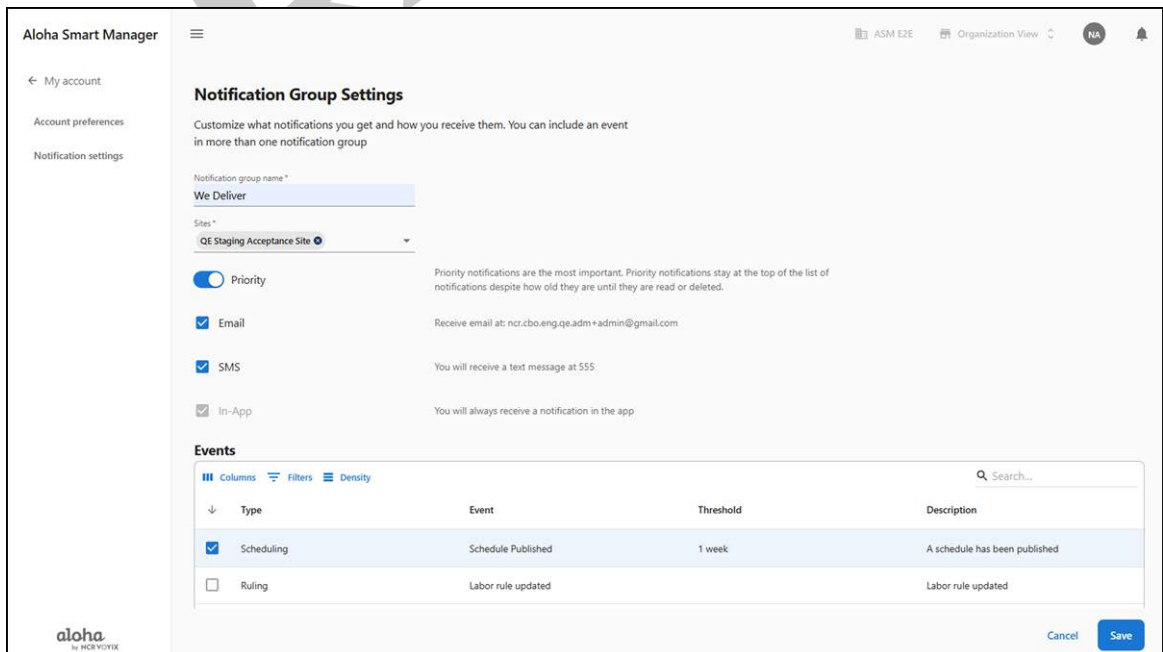
Configuring notification groups

1. Click the **profile icon** and select **Notification settings** from the menu that appears. The 'Notification settings' screen appears.



'Notification settings' screen

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



'Notification Group Settings' screen

3. Type a **name** for the notification group.
4. Select the **sites** to include in the notification group. Only the sites to which you have access are available for selection.
5. 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.
6. 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.
7. Select **SMS** to send the notification by short message service (SMS). The system defaults to the phone number configured in the 'Account preferences' screen.

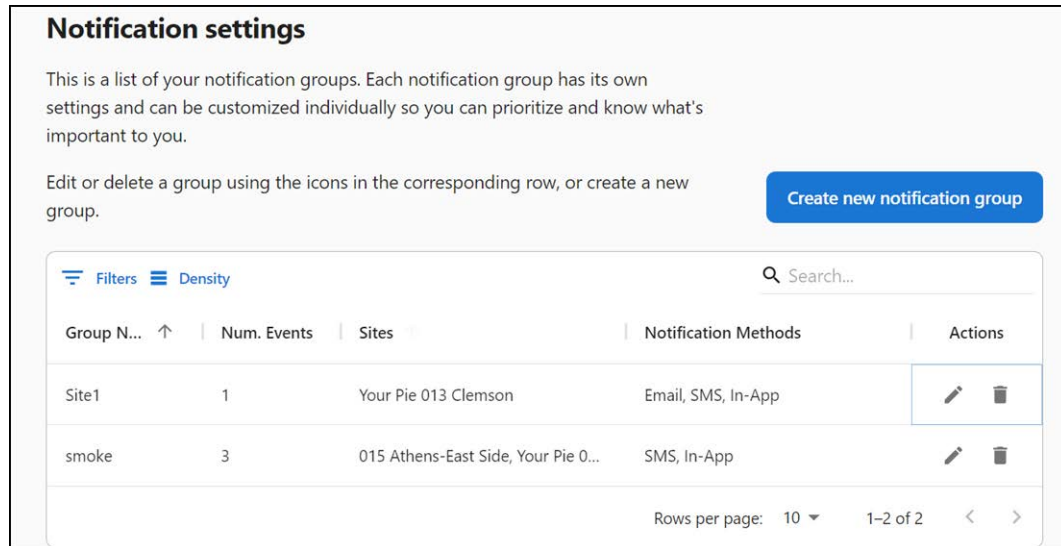
 **Tip**

To use a different phone number, click 'Add phone number' to display the 'Account preferences' screen and enter a phone number.

8. 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.
9. Under the Events section, select the **event(s)** to include in the notification group. You can add multiple events to a single notification group.
10. Click **Save** to create the notification group. The notification group appears in the 'Notification settings' screen.

To edit or delete a notification group:

1. Click the **Profile icon** and select **Notification settings** from the menu that appears. The 'Notification settings' screen appears with a list of existing notification groups.



'Notification settings' screen

2. Click the **three dots** under **Actions** for the notification group to edit or delete.
3. Click the **pencil icon** to make changes to the group and continue to the **next step**.
-OR-
Click the **trash can** to delete the group.
4. Make the **necessary edits** and click **Save**. A success message appears and automatically dismisses.

Viewing a notification sent to you

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

An in-app notification contains the following:

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

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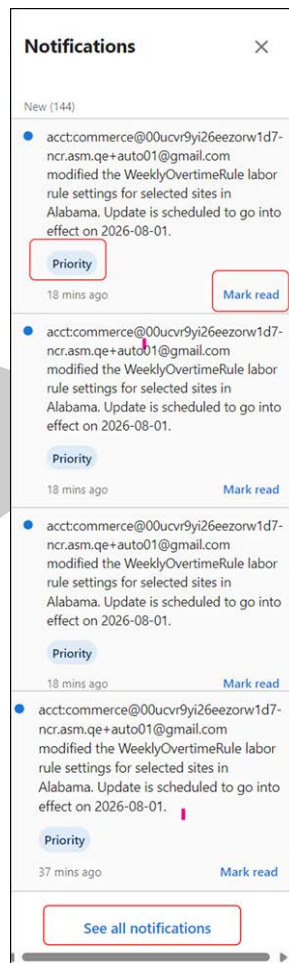
To view a notification:

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



Notifications Icon

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



Notifications Drawer

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

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



All notifications

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

About Labor

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

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

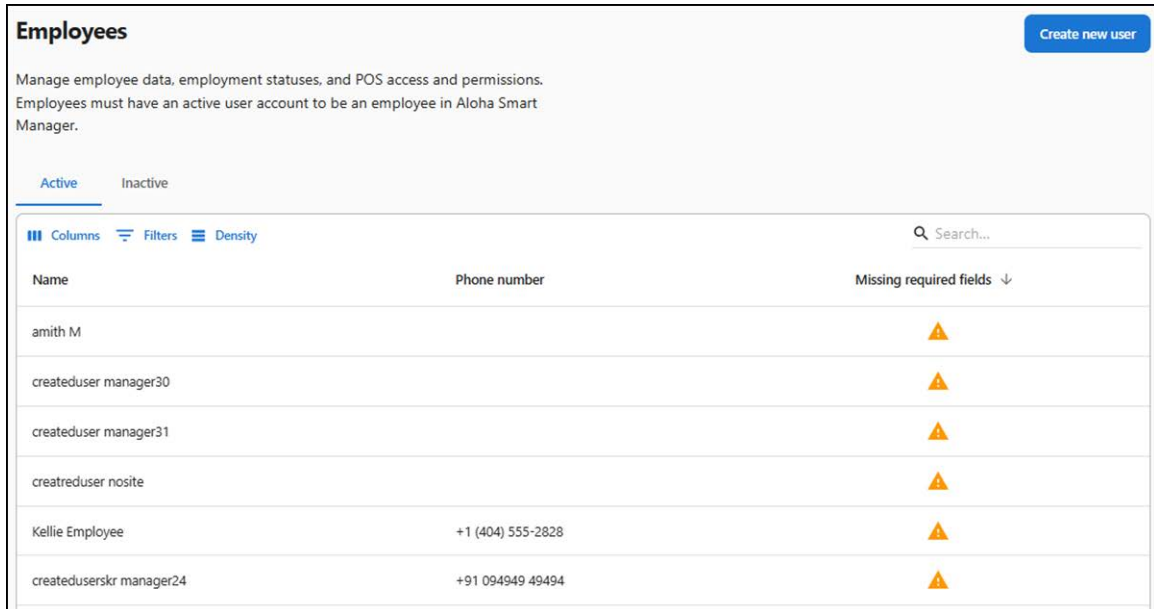
Some key areas of the Labor module include:

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

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Working with employees

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



'Employees' screen

The Employees screen provides access to two tabs, Active and Inactive, with the Active tab being the Active tab.

- **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.
- **Inactive tab**— Displays employees who are no longer associated with the restaurant. Reactivate employees, as needed.

The tables are populated with employee details and contain the following information:

Column	Description
Name	Name of the employee.
Phone number	Phone number of the employee.
Missing required fields	Displays a caution symbol to indicate required information for the employee is missing.

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: Assigning a job to a new employee](#)

Step 1: Hiring manager creates a new employee

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



Reference

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

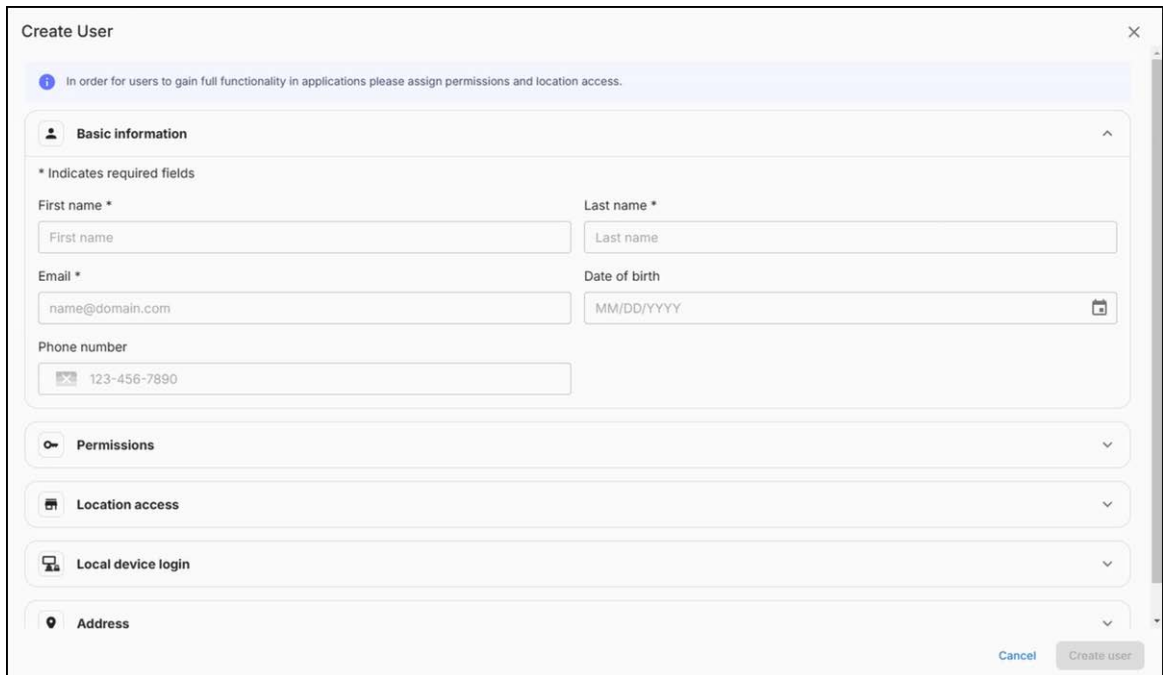
1. Select **Labor > Employees**. The 'Employees' screen appears.

Name	Phone number	Missing required fields ↓
amith M		⚠
createduser manager30		⚠
createduser manager31		⚠
creatreduser nosite		⚠
Kellie Employee	+1 (404) 555-2828	⚠
createduserskr manager24	+91 094949 49494	⚠

'Employees' screen

2. Click **Create new user**. You are redirected to NCR Identity.
3. Click Users in the left navigation pane to display the Users screen.

4. Click **Create new user** to display the 'Create User' screen with the 'Basic information' group bar expanded.



The screenshot shows a 'Create User' dialog box. At the top, there is a blue informational banner that reads: 'In order for users to gain full functionality in applications please assign permissions and location access.' Below this, the 'Basic information' section is expanded, showing a list of required fields: First name, Last name, Email, Date of birth, and Phone number. Each field has a corresponding input box. The 'Email' field contains the placeholder 'name@domain.com' and the 'Date of birth' field has a calendar icon. Below the 'Basic information' section are four collapsed sections: 'Permissions', 'Location access', 'Local device login', and 'Address'. At the bottom right of the dialog, there are 'Cancel' and 'Create user' buttons.

'Create User' screen in NCR Identity



Reference

Refer to the [Identity Quickstart Guide](#) for more information about creating new user accounts.

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



Warning

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

7. If the employee you are adding is an in-store employee only and does not require access to ASM for any reason, continue to **step 10** to establish the PIN the employee is to use when logging in to the POS; otherwise, continue to the **next step**.

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

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

- Email: irmangelmom@mindspring.com (checked)
- Phone number: 123-456-7890
- Date: MM/DD/YYYY
- Permissions** section is expanded:
 - Apply one role to all apps or apply roles on an app-basis below. (Employee)
 - Identity: Assign role
 - Aloha Smart Manager: Employee
 - Location access
 - Local device login
 - Address
- Buttons: Cancel, Create user

'Permissions' screen

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

10. Expand **Location access**.

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

- Identity:** Aloha Smart Manager
- Assign role:** Employee
- Location access:** 1 site selected. The selected site is 'ASM Lab 491 441 QS' (ID: 63fe3c19fe8a461eba3f7e9fbc9a8f04). A search bar is present above the list.
- Local device login:** (Collapsed)
- Address:** (Collapsed)
- Buttons:** Cancel and Create user.

'Location access' screen

11. Select the **sites** to make available to the user account.

12. Expand **Local device login**.

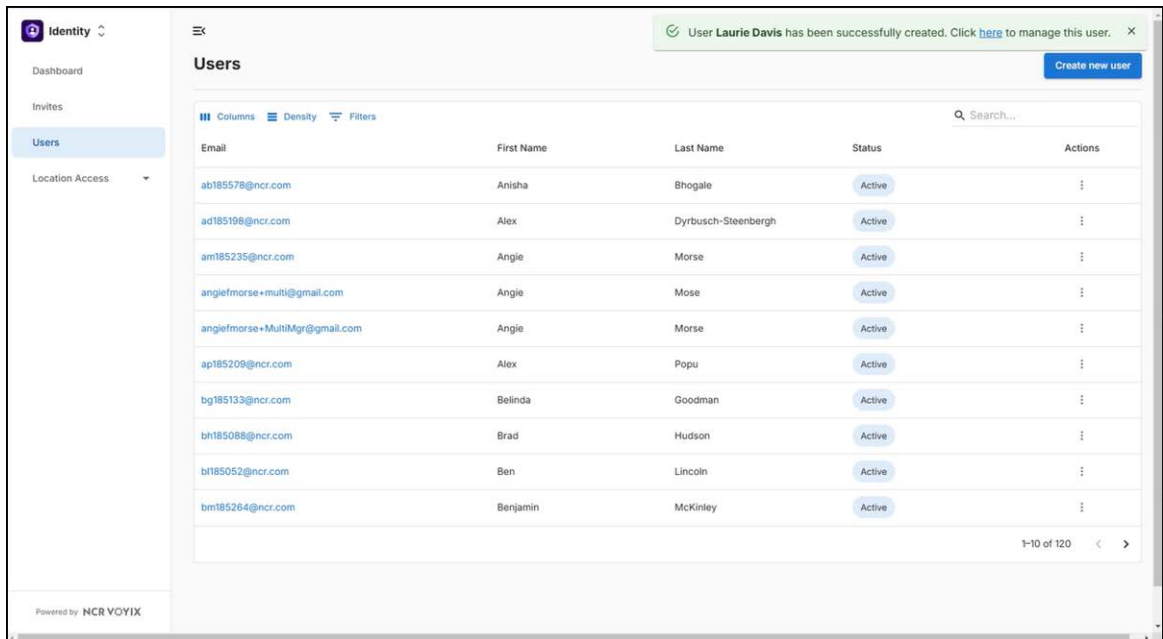
The screenshot shows the 'Create User' form with the following details:

- Note:** In order for users to gain full functionality in applications please assign permissions and location access.
- Basic information:** (Collapsed)
- Permissions:** (Collapsed)
- Location access:** (Collapsed)
- Local device login:** Expanded. The 'Device login' field contains '14789' and has a green checkmark.
- Address:** (Collapsed)
- Buttons:** Cancel and Create user.

Establish POS login PIN

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

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



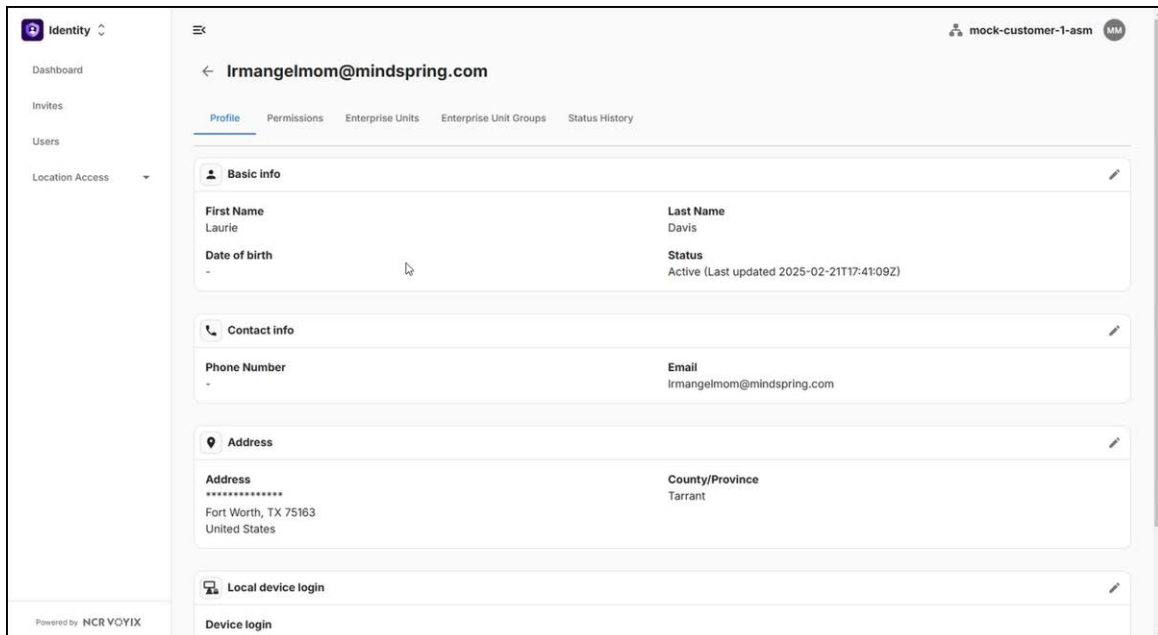
'Create user' success message



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.

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



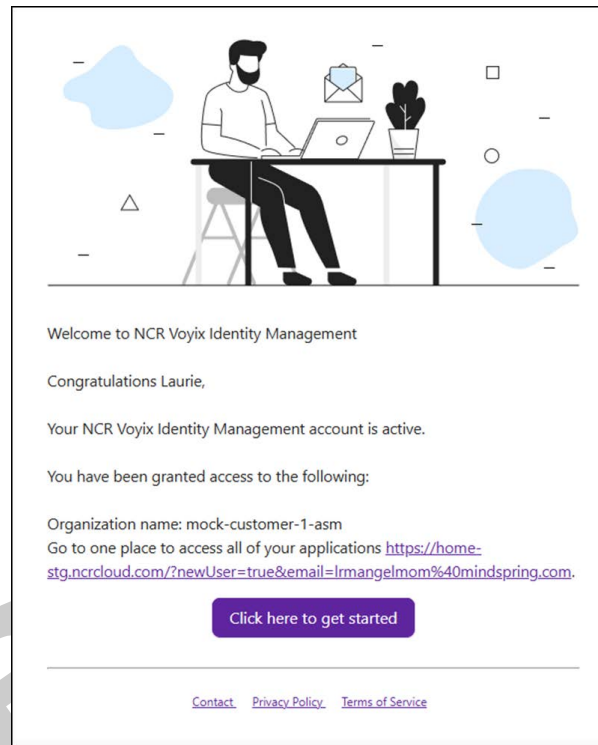
Employee information summary screen

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

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

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

1. Open the **Welcome email**.



Welcome email

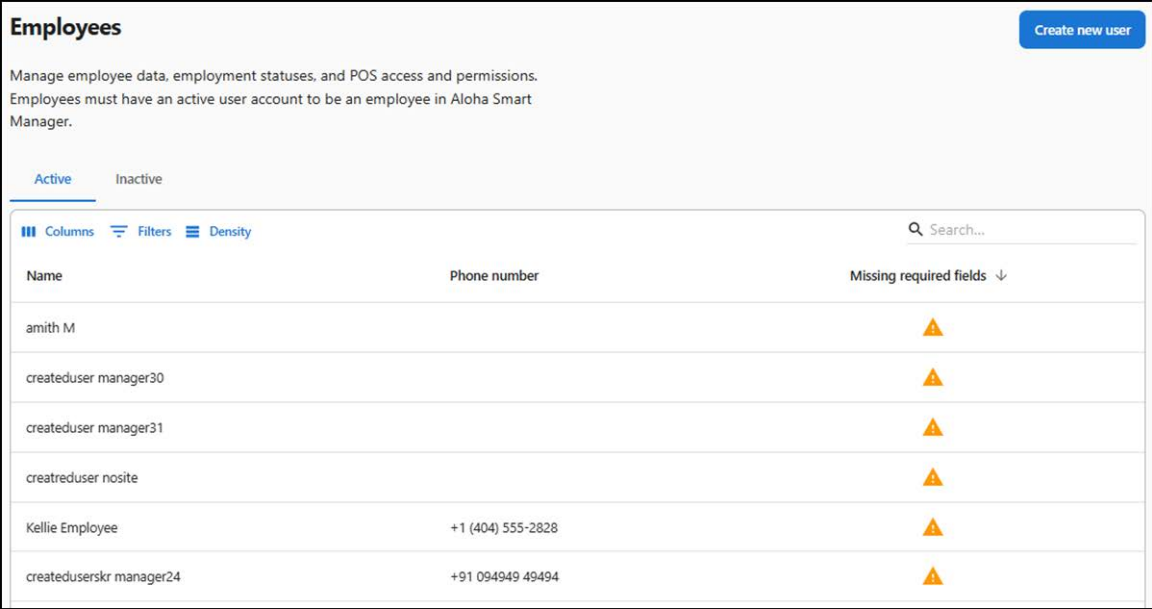
2. Within the email text, click **Click here to get started**. The 'Create your NCR account' screen appears.
3. If you need additional information on how to create your account, please refer to the [Identity Management Quickstart Guide](#).

Step 3: Assigning a job to a new employee

After an employee completes the steps in the Welcome email, the hiring manager must assign at least one job to the employee before they can be placed on a schedule. Once this occurs, their status changes to hired.

To assign a job to an employee:


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





'Employees' screen

2. Click the **Caution icon** next to the employee in the list to display the 'Employees profile' screen.


Employees / Prafulla Nayak

Prafulla Nayak  [Manage user](#)


[Profile](#) [Jobs](#) 

Basic Information 


First name	Prafulla	Preferred name	-
Last name	Nayak	Date of birth	-
External ID	-		

Status 


User status	PENDING	Effective date	-
Employment reason	-		

Contact Information 


Phone number	-	Email address	pn185114@ncr.com
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Address 

-

Local device login 

Device username	-
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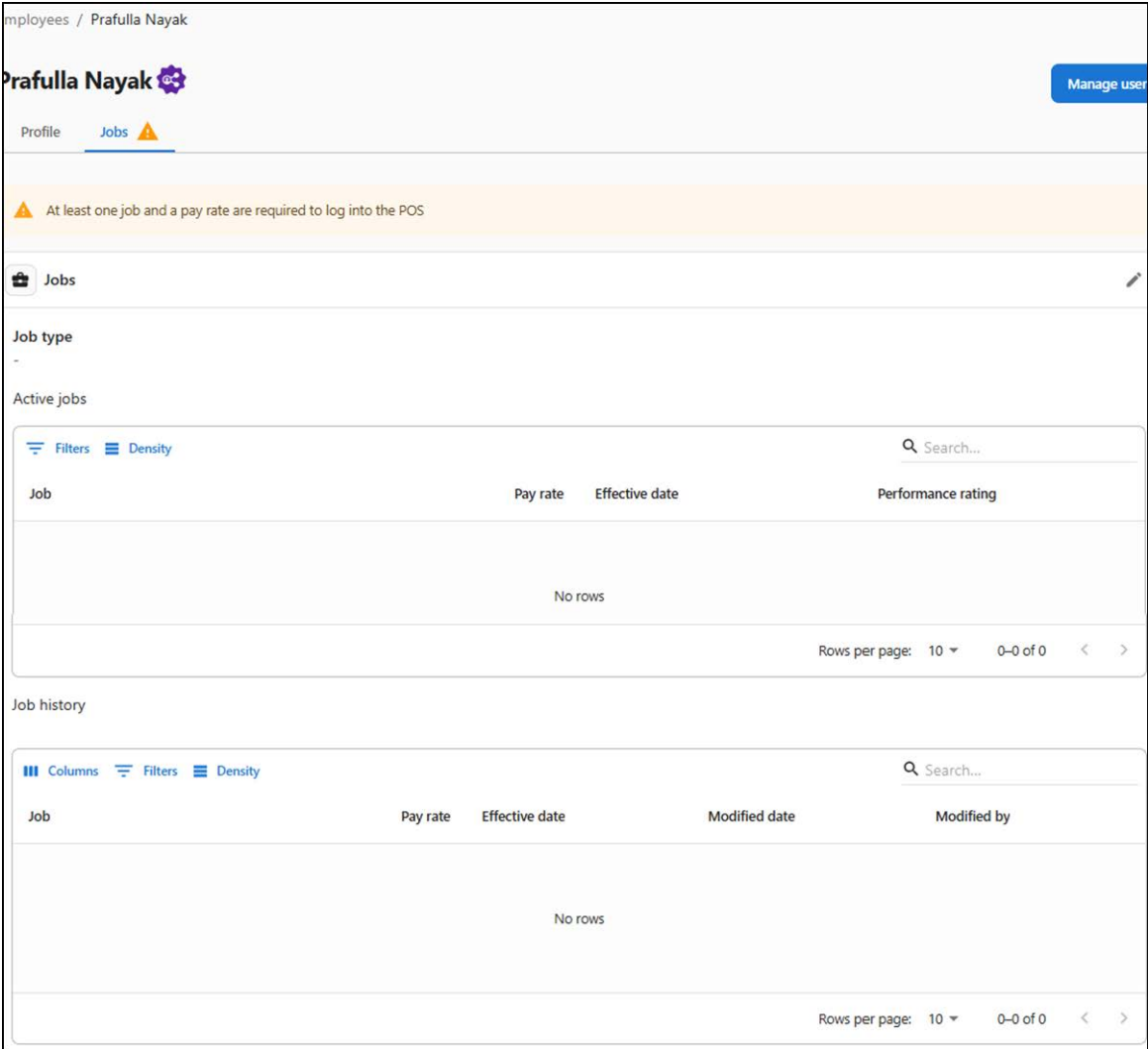
Certifications 

Certificate name	-	Certificate number	-
Certificate expiration	-		

Employee profile screen

Under the **Status** group bar, you can see the **User status** of the employee as PENDING.

3. Select the **Jobs** tab under the employee name. The **Jobs** screen appears..



'Jobs' tab

- Click the **pencil icon** at the far right of the **Jobs** group bar.

At least one job and a pay rate are required to log into the POS

Jobs

Job type*
Hourly

- Full-time
- Part-time
- Hourly
- Salary exempt
- Salary non-exempt

Effective date

Performance rating

Search...

No rows

Rows per page: 10 0-0 of 0

Cancel Save

Employee 'job type'

- Select the **Job type** from the drop-down list. Choose from Full-time, Part-time, Hourly, Salary exempt, Salary non-exempt.
- Click **Save**.
- Click the **pencil icon** again.
- Click **Add job**.

Jobs

Cashier

Cocktail

Dishwasher

Host

Server

FOH Team Member

FOH Team Member

Pay rate*

Pay rate

Effective date

Performance rating

Actions

Search...

3/12/2025

☆☆☆☆☆

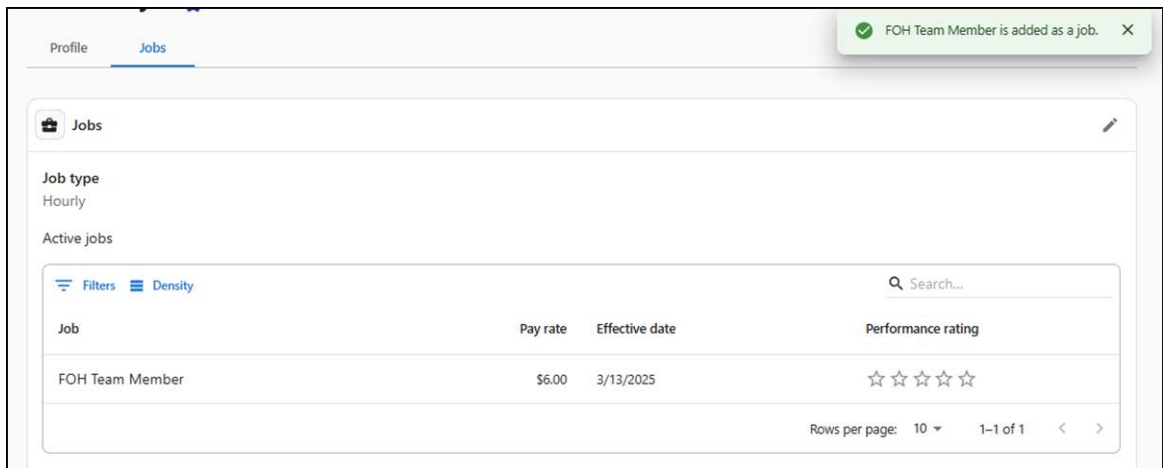
Rows per page: 10 1-1 of 1

Cancel Save

Employee 'Add job'

The **Active jobs** table appears with attributes like **Job**, **Pay rate**, **Effective date**, **Performance rating**, and **Actions**.

9. Select a **job** to assign the employee from the drop-down list.
10. Type the **Pay rate** the employee will receive when logged in under that job.
11. Select a **Performance rating**, if required, and click **Save** icon in **Actions**. You cannot change the **Effective date** for an employee.
12. Click the **Save icon** to the right. A message confirming the added job appears and the screen updates with the job details.



Employee job confirmation

13. Select the **Profile** tab again after adding the job. The **User status** changes to HIRED and the caution symbol is no longer visible.
14. Click **Employees** to view the employee list. The caution symbol is removed from the **Missing required fields**, and the employee appears in the **Active** employees list. This employee is now available for scheduling.

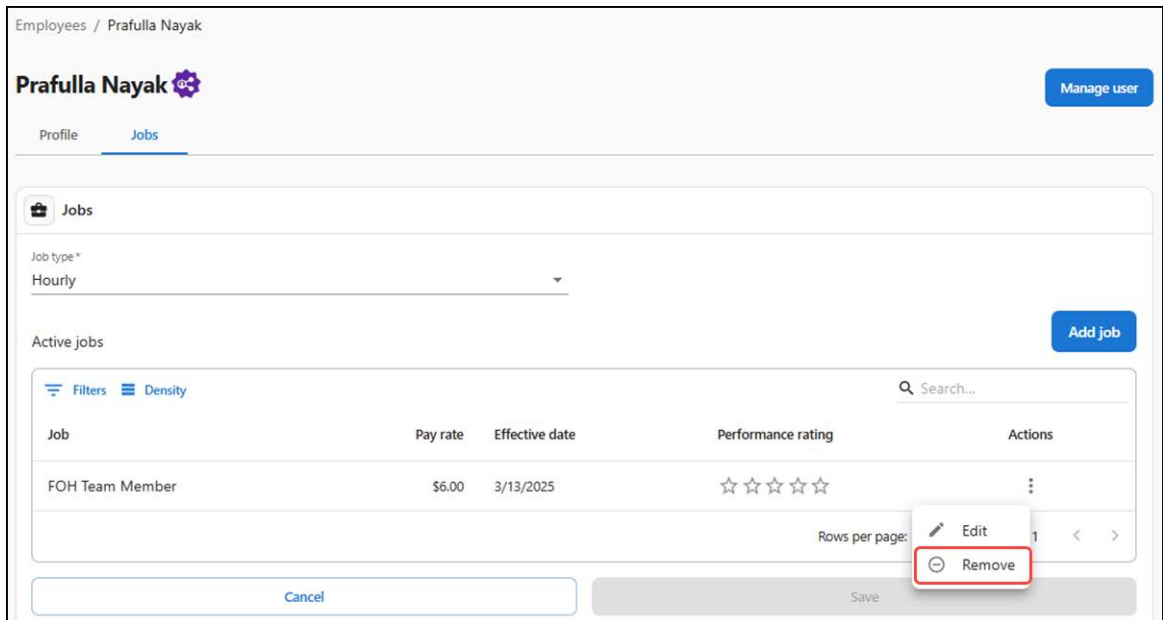
Removing a job for an employee

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:

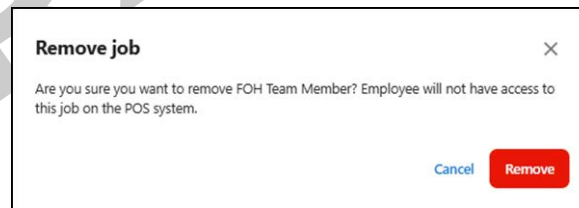
1. Select **Labor > Employees**. The 'Employees' screen appears.
2. Select the **employee** in the Active tab. The employee profile screen appears.
3. Select the **Jobs** tab under the employee name. The **Jobs** screen appears.

- Click the **pencil icon** at the far right of the **Jobs** group bar.



'Jobs' screen

- Click on the **three dots** under **Actions** and click **Remove**. A confirmation message to remove the job from the employee appears.



Remove job window

- Click **Remove** to confirm.

Managing employee profile

After an employee completes the onboarding process, the employee data reflects in the Profile tab of Employees screen. The data can be edited or removed 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.

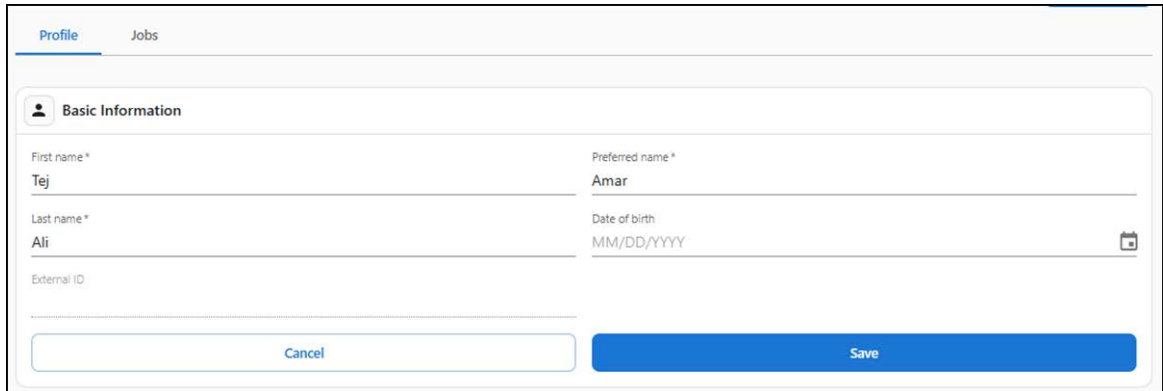
The screenshot displays the 'Employee profile screen' for Prafulla Nayak. The interface includes a breadcrumb 'Employees / Prafulla Nayak', a profile picture, and a 'Manage user' button. The main content is organized into several sections, each with an edit icon:

- Profile** (selected) and **Jobs** (with a warning icon)
- Basic Information**: Fields for First name (Prafulla), Preferred name (-), Last name (Nayak), Date of birth (-), and External ID (-).
- Status**: Fields for User status (PENDING), Effective date (-), and Employment reason (-).
- Contact Information**: Fields for Phone number (-) and Email address (pn185114@ncr.com).
- Address**: Field for Address (-).
- Local device login**: Field for Device username (-).
- Certifications**: Fields for Certificate name (-), Certificate number (-), and Certificate expiration (-).

Employee profile screen

To view and edit the employee profile

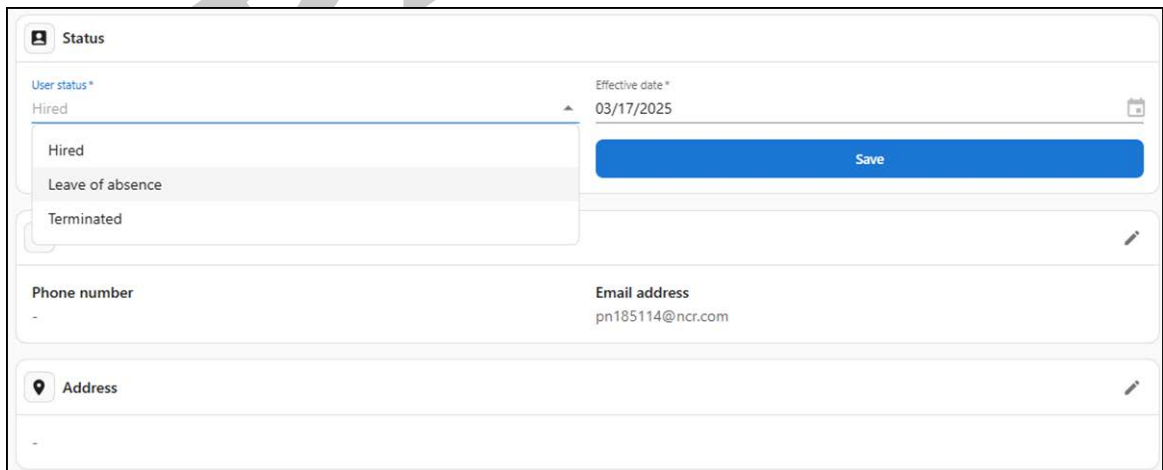
1. Select **Labor > Employees**. The 'Employees' screen appears.
2. Select the **employee** from the list. The employee profile screen appears.
3. Click the **pencil icon** at the right end of the **Basic information** group bar.



The screenshot shows the 'Profile' tab of an employee's information. The 'Basic Information' section contains the following fields: 'First name*' with the value 'Tej', 'Preferred name*' with the value 'Amar', 'Last name*' with the value 'Ali', and 'Date of birth' with a calendar icon and the format 'MM/DD/YYYY'. There is also an 'External ID' field which is currently empty. At the bottom of the form are two buttons: 'Cancel' and 'Save'.

Employee basic information

4. Type **First name**, **Last name** and **Preferred name** of the employee.
5. Enter the **Date of birth** of the employee or select it from the calendar.
6. Click **Save**.

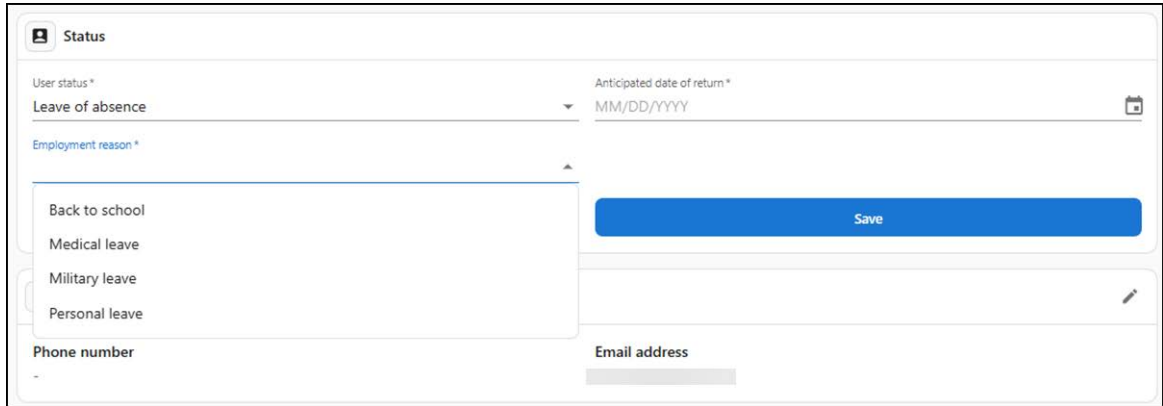


The screenshot shows the 'Status' section of the employee profile. The 'User status*' dropdown menu is open, showing options: 'Hired', 'Leave of absence', and 'Terminated'. The 'Effective date*' is set to '03/17/2025'. Below this, there is a 'Save' button. Further down, there are fields for 'Phone number' (currently empty) and 'Email address' (pn185114@ncr.com). At the bottom, there is an 'Address' field with a location pin icon and an edit icon.

Employee status

7. Click the **pencil icon** at the right end of the **Status** group bar, if you need to change the status of the employee.

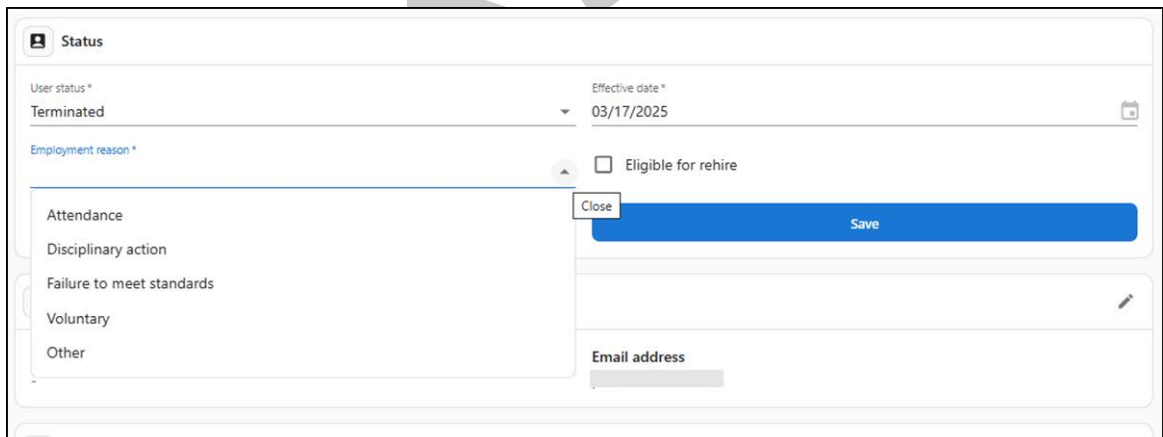
8. Select **Hired** to indicate the employee is available for scheduling. Hired is the default status for active employees. You cannot change the 'Effective date' for employees if the User Status is Hired.



The screenshot shows a 'Status' form. The 'User status' dropdown is set to 'Leave of absence'. The 'Anticipated date of return' field is empty, with a placeholder 'MM/DD/YYYY' and a calendar icon. The 'Employment reason' dropdown is open, showing options: 'Back to school', 'Medical leave', 'Military leave', and 'Personal leave'. Below the dropdown is a 'Save' button. Other fields include 'Phone number' and 'Email address'.

Employee reasons for leave

Select **Leave of absence** to place an employee on leave of absence. Select a **reason** from the drop-down list and the **anticipated date of return**.



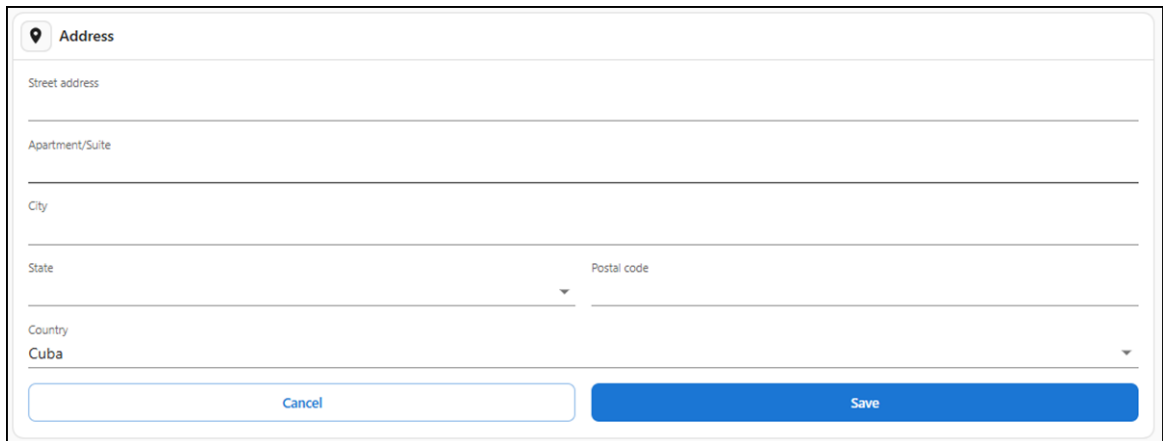
The screenshot shows a 'Status' form. The 'User status' dropdown is set to 'Terminated'. The 'Effective date' field is set to '03/17/2025'. The 'Employment reason' dropdown is open, showing options: 'Attendance', 'Disciplinary action', 'Failure to meet standards', 'Voluntary', and 'Other'. There is an 'Eligible for rehire' checkbox which is unchecked. A 'Close' button is visible near the dropdown. Below the dropdown is a 'Save' button. Other fields include 'Email address'.

Employee termination

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.

9. Click **Save** to save the changes to status.

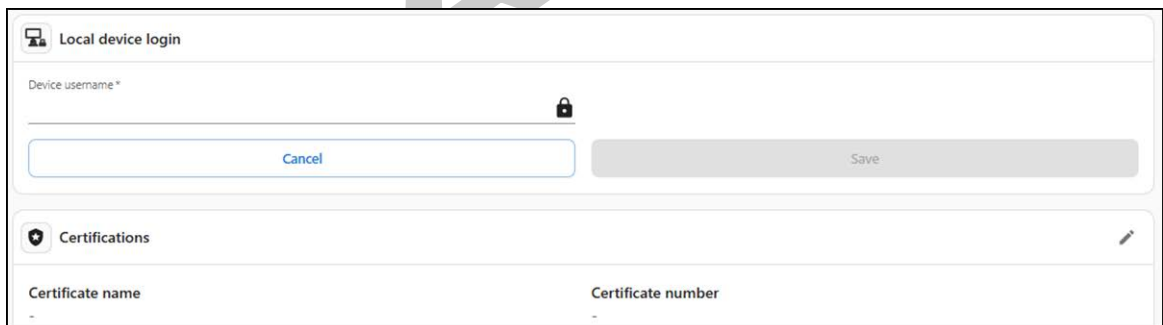
10. Click the **pencil icon** at the right end of the **Address** group bar to edit or change the address of the employee.



The screenshot shows a form titled "Address" with a location pin icon. It contains several input fields: "Street address", "Apartment/Suite", "City", "State" (a dropdown menu), "Postal code", and "Country" (a dropdown menu with "Cuba" selected). At the bottom, there are two buttons: "Cancel" and "Save".

Employee address

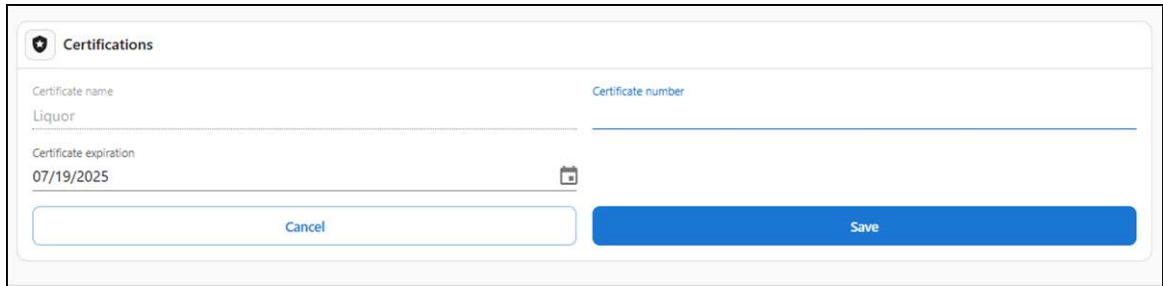
11. Type your **Street address, Apartment/Suite, City, and Postal code.**
12. Select the **State** and **Country** from the drop-down list.
13. Click **Save**.



The screenshot shows two sections. The top section is titled "Local device login" and contains a "Device username*" input field with a lock icon. Below it are "Cancel" and "Save" buttons. The bottom section is titled "Certifications" and contains a table with two columns: "Certificate name" and "Certificate number". Both columns have a hyphen "-" as a placeholder value.

Employee local device login

- Click the **pencil icon** at the right end of the **Local device login** group bar to enter the code to login to the POS.



The screenshot shows a form titled "Certifications" with the following fields and controls:

- Certificate name:** A text input field containing the word "Liquor".
- Certificate number:** A text input field that is currently empty.
- Certificate expiration:** A date input field showing "07/19/2025" with a calendar icon to its right.
- Buttons:** A "Cancel" button and a "Save" button are located at the bottom of the form.

Employee certifications

- Click the **pencil icon** at the right end of the **Certifications** group bar to edit or change the certifications of the employee
- Enter the **Certificate number** of the license.
- Type the **date** or **select it from the calendar** when the certification expires.
- Click **Save**.

DRAFT

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 Publish (1)

Last published 4/7/2025 by se185036@ncr.com

Today < 04/04/2025 - 04/10/2025 > Employee Job

+ Add announcement

Name	Total	Fri 04	Sat 05	Sun 06	Mon 07	Tue 08	Wed 09	Thu 10
Andy AC Asst Mgr	0.00 hr							
April 1 v1.16 Manager	55.75 hr	6:30a - 7:15a Manager 9:00p - 10:00p Manager	6:00a - 7:00a Manager	6:00a - 8:00a Manager	4:00a - 9:00p Manager	4:00a - 9:00p Manager	4:00a - 9:00p Manager	
Achvita M	0.00 hr							

Summary data Refresh

		Fri	Sat	Sun	Mon	Tue	Wed	Thu
Historic sales average	\$3,504,997	\$3,502,302	\$5	\$38	\$644	\$595	\$982	\$429
Scheduled hours	148.50 hr	21.75 hr	34.50 hr	16.00 hr	38.25 hr	20.00 hr	17.00 hr	1.00 hr
Scheduled labor cost %	0.08 %	0.01 %	15629.00 %	881.02 %	114.65 %	56.03 %	26.30 %	2.38 %

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.
job	Select a job. Upon selection, the employees assigned to the corresponding job appear in the schedule viewer. Related Information: Ensure the jobs are already defined in the 'jobs configuration' screen.
Add announcement	Add an announcement to a schedule.
Schedule viewer	Schedule viewer (calendar view of a specific week). The calendar view lists the following details: <ul style="list-style-type: none"> • Name of the employee for whom the shift is scheduled. • Total number of hours the employee has worked for the selected week. For example, if the employee's scheduled hours are approaching or exceeding overtime limits, the corresponding hours are highlighted in red. Additionally, upon hovering over the warning icon, the <i>Review the employee for the following: Part-time critical</i> message appears. • Week for which the shift is planned.
Adding a shift	Hover-over the calendar to view the Add Shift option. Use this option to create new shifts. Related information: To understand how to create shifts, see Adding a shift .
Cell in the Schedule table	Indicates the shift and job currently assigned to the employee.
Summary data	View the summary information for the past six weeks under Historic sales average, Scheduled hours, and Scheduled labor cost %.
Publish	Publish the shift calendar to employees.

Selecting a schedule week

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

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

Also, you can view:

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

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

Schedule Publish (1)

Last published 4/7/2025 by se185036@ncr.com

Today < 04/04/2025 - 04/10/2025 > Employee Job

Add announcement

Name	Total	Fri	Sat	Sun	Mon	Tue	Wed	Thu
Andy AC Asst Mgr	0.00 hr	04	05	06	07	08	09	10
April 1 v1.16 Manager	55.75 hr	6:30a - 7:15a Manager	6:00a - 7:00a Manager	6:00a - 8:00a Manager	4:00a - 9:00p Manager	4:00a - 9:00p Manager	4:00a - 9:00p Manager	
Achrita M	0.00 hr	9:00p - 10:00p Manager						

Summary data Refresh

		Fri	Sat	Sun	Mon	Tue	Wed	Thu
Historic sales average	\$3,504,997	\$3,502,302	\$5	\$38	\$644	\$595	\$982	\$429
Scheduled hours	148.50 hr	21.75 hr	34.50 hr	16.00 hr	38.25 hr	20.00 hr	17.00 hr	1.00 hr
Scheduled labor cost %	0.08 %	0.01 %	15629.00 %	881.02 %	114.65 %	56.03 %	26.30 %	2.38 %

'Schedule' screen

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

Select **Today** to display the schedule for the current week with the current day selected. For example: If today is 'Wednesday,' the date range appears for the current week with Wednesday selected.

Select **<** and **>** to move one schedule week at a time, forward or backward.

Select the **range** from the calendar picker.

Adding a shift

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

To add a shift:

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

Schedule Print Publish

Last published 3/14/2025 by ph185071@ncr.com

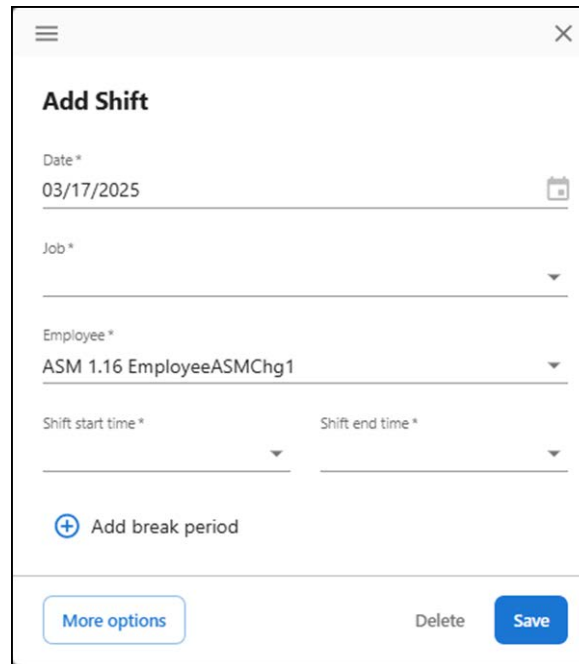
Today < 03/14/2025 - 03/20/2025 > Employee Job

+ Add announcement

Name	Total	Fri	Sat	Sun	Mon	Tue	Wed	Thu
aasdf fdsafds	0.00 hr							
Ashok Adapa	28.00 hr				6:00a - 9:00p Manager		8:00a - 8:00p Manager	10:00a - 10:00p Manager
ASM 1.16 EmployeeASMCI	12.75 hr	5:00p - 11:45p Bartender	4:00p - 10:00p Bartender		Add Shift			

'Schedule' adding shift

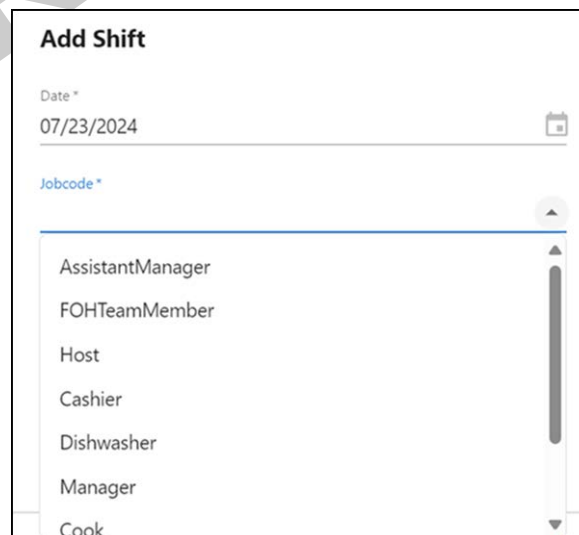
2. Locate the **employee in the list**, hover over the **date** to the right, and click **Add Shift**. The 'Add Shift' screen appears as a pop-out with the selected date..



The screenshot shows a mobile-style 'Add Shift' pop-up window. At the top left is a hamburger menu icon and at the top right is a close 'X' icon. The title 'Add Shift' is centered at the top. Below the title are several input fields: 'Date *' with the value '03/17/2025' and a calendar icon; 'Job *' with a dropdown arrow; 'Employee *' with the value 'ASM 1.16 EmployeeASMChg1' and a dropdown arrow; 'Shift start time *' and 'Shift end time *' with dropdown arrows. Below these fields is a blue circular button with a plus sign and the text 'Add break period'. At the bottom of the form are three buttons: 'More options' (blue outline), 'Delete' (grey), and 'Save' (blue solid).

'Add Shift' screen

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

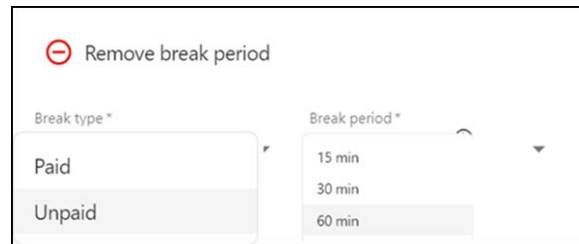


This screenshot shows the same 'Add Shift' pop-up window, but with the 'Jobcode *' dropdown menu expanded. The menu lists the following job roles: AssistantManager, FOHTeamMember, Host, Cashier, Dishwasher, Manager, and Cook. The 'Date *' field now shows '07/23/2024'. The 'Employee *' field is not visible in this view.

Job selection

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

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



Break type and period selection

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



Note

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

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

The screenshot shows the 'Schedule' interface. At the top, it says 'Last published 3/14/2025 by ph185071@ncr.com'. Below that are navigation buttons for 'Today', a date range '03/14/2025 - 03/20/2025', and dropdowns for 'Employee' and 'Job'. There is an 'Add announcement' button. The main part of the interface is a table with columns for days of the week (Fri, Sat, Sun, Mon, Tue, Wed, Thu) and rows for employees. A success message 'Shift detail added' is visible in the top right corner.

Name	Total	Fri	Sat	Sun	Mon	Tue	Wed	Thu
aasdf fdsafds	0.00 hr	14	15	16	17	18	19	20
Ashok Adapa	28.00 hr				6:00a - 9:00p Manager		8:00a - 8:00p Manager	10:00
ASM 1.16 EmployeeASMC	20.75 hr	5:00p - 11:45p Bartender	4:00p - 10:00p Bartender		9:00a - 5:00p Cashier			

Success message

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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.

Name	Total	Fri 04	Sat 05	Sun 06	Mon 07	Tue 08	Wed 09	Thu 10
Andy AC Asst Mgr	0.00 hr							
April 1 v1.16 Manager	55.75 hr	6:30a - 7:15a Manager	6:00a - 7:00a Manager	6:00a - 8:00a Manager	4:00a - 9:00p Manager	4:00a - 9:00p Manager	4:00a - 9:00p Manager	
		9:00p - 10:00p Manager						
Achrita M	0.00 hr							

Summary data		Refresh							
Historic sales average	\$3,504,997	\$3,502,302	\$5	\$38	\$644	\$595	\$982	\$429	
Scheduled hours	148.50 hr	21.75 hr	34.50 hr	16.00 hr	38.25 hr	20.00 hr	17.00 hr	1.00 hr	
Scheduled labor cost %	0.08 %	0.01 %	15629.00 %	881.02 %	114.65 %	56.03 %	26.30 %	2.38 %	

'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

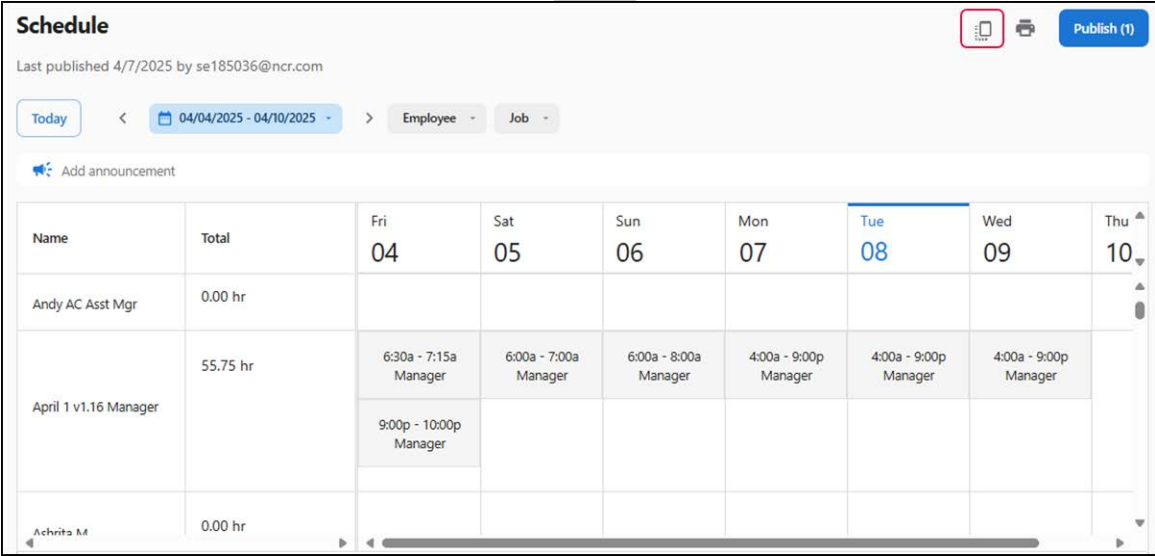
When you are finished with a schedule, click Publish in the top right corner to publish and finalize the schedule. Publish exposes the shift to the employees for the first time. Until then the schedule is in a 'draft' state and managers can make all the edits they need. You can return to the schedule,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

Copying a schedule

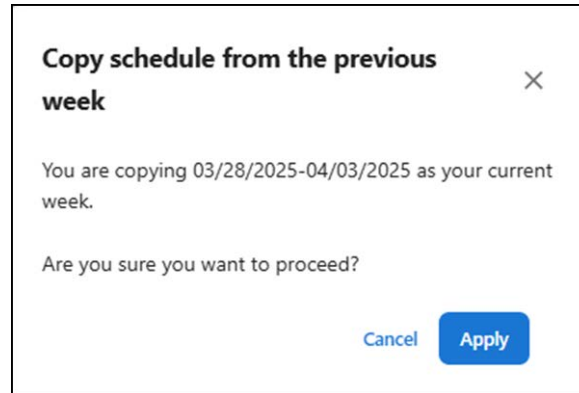
The 'copy schedule' feature for a manager is efficient, saving time by duplicating existing schedules. It is convenient, simplifying the process of creating new schedules with ease. Additionally, it ensures consistency across different shifts, making it user-friendly and flexible for quick adjustments and modifications.



'Copy' schedule

To copy a schedule:

1. Select **Labor > Schedule**. The 'Schedule' screen appears.
2. Click the **copy icon** at the top right corner of the screen.



- A confirmation screen appears as a pop-out with the selected date.
3. Click **Apply**. The system copies the schedule for the current week.

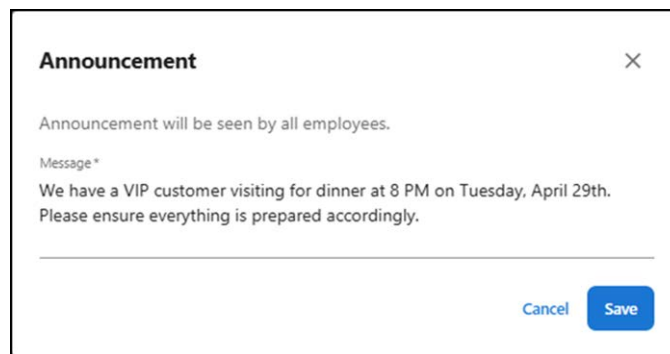
DRAFT

Adding an announcement to a schedule

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

To add an announcement to a schedule:

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



'Announcement' screen

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

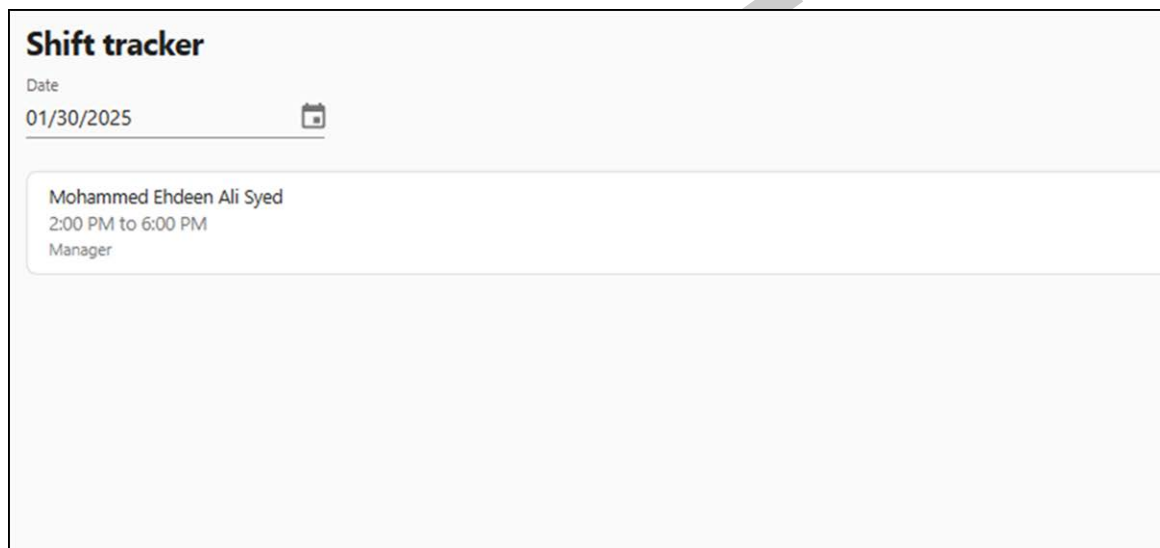
Viewing employees on a shift

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

To view employees on a shift:

Select **Labor** > **Shift tracker**. The 'Shift tracker' screen appears. By default, the current date is automatically selected, and the following details appear:

- The employees scheduled to work for the current date.
- The time slot scheduled for each employee.
- The job under which each employee will work.



'Shift tracker' screen

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

Working with punches

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

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

To add a punch:

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

Punch summary Add punch

Schedule week: 3/14/2025 - 3/20/2025

< 03/18/2025 >

Filters Density Search...

Employee ¹	Employee POS ID	Job	Clock in ²	Clock out	Regular hours worked	Overtime hours worked
-		Manager	4:57 PM	5:03 PM	0.00	0.00
ACPOS Hari		Manager	3:57 PM	3:59 PM	0.00	0.00
ACPOS Hari		Manager	4:00 PM	4:00 PM	0.00	0.00
ACPOS Sudhanshu		Manager	4:53 AM	5:30 AM	0.00	0.00
CreatedUser Manag...		Cashier	3:40 PM		0.00	0.00

Rows per page: 10 1-5 of 5 < >

'Punch summary' screen

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

Punch summary Add punch

Schedule week: 3/14/2025 - 3/20/2025

< 03/18/2025 >

Filters Density Search...

Employee ¹	Employee POS ID	Job	Clock in ²	Clock out	Reg
-		Manager	4:57 PM	5:03 PM	0.00
ACPOS Hari		Manager	3:57 PM	3:59 PM	0.00
ACPOS Hari		Manager	4:00 PM	4:00 PM	0.00
ACPOS Sudhanshu		Manager	4:53 AM	5:30 AM	0.00
CreatedUser Manag...		Cashier	3:40 PM		0.00

Rows per page: 10 1-5 of 5

Add punch Close

* Indicates required fields

Date*
03/18/2025

Read only

Employee*
Select

Job*
Select

Clock in* Clock out*

+ Add break period

Cancel

Save

'Add punch' screen

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

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

The screenshot shows a mobile application interface for adding a punch. At the top left is a 'Close' button with an 'X' icon. The main title is 'Add punch' with a subtitle '* Indicates required fields'. The form contains the following elements:

- Date ***: A text field containing '03/17/2025' and a calendar icon to its right. Below it is the text 'Read only'.
- Employee ***: A dropdown menu with 'Select' as the current selection.
- Job ***: A dropdown menu with 'Select' as the current selection.
- Clock in ***: A time selection field with a clock icon, currently showing '--:-- --'.
- Clock out ***: A time selection field with a clock icon, currently showing '--:-- --'.
- + Add break period**: A button with a plus sign icon.
- Declared tips**: A text field with a dollar sign '\$' as a prefix.
- Punch edit reason ***: A dropdown menu with 'Select' as the current selection.

At the bottom of the form are two buttons: a white 'Cancel' button and a blue 'Save' button.

'Add punch' screen

DR

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

The screenshot displays two identical 'Break section' forms stacked vertically. Each form is enclosed in a black border and contains the following elements from top to bottom: a minus sign icon followed by the text 'Remove break period'; a label 'Break type *' above a dropdown menu currently showing 'Paid'; a label 'Break out *' above a time input field showing '12:30 PM' with a clock icon; a label 'Break in *' above a time input field showing '01:00 PM' with a clock icon; another minus sign icon followed by 'Remove break period'; another 'Break type *' dropdown menu showing 'Paid'; and finally, another 'Break out *' field showing '03:00 PM' and another 'Break in *' field showing '03:15 PM', both with clock icons.

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.

The screenshot displays a form with two input fields at the top: 'Total sales' and 'Declared tips', both with a '\$' symbol and a 'Read only' label. Below these is a dropdown menu titled 'Punch edit reason *' with the text 'Select' and a downward arrow. The dropdown menu is open, showing five options: 'Forgot to clock in/out', 'Incorrect clock in/out', 'Incorrect break out/in', 'Incorrect jobcode' (which is highlighted), and 'Other'. At the bottom of the form are two buttons: a light blue 'Cancel' button and a dark blue 'Save' button.

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 147](#).
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.

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

11. Click **Save**.

Punch summary

Schedule week: 3/14/2025 - 3/20/2025

< 03/18/2025 >

Filters Density Search...

Employee ¹	Employee POS ID	Job	Clock in ²	Clock out	Regular hours worked	Overtime hours worked
-		Manager	4:57 PM	5:03 PM	0.00	0.00
ACPOS Hari		Manager	3:57 PM	3:59 PM	0.00	0.00
ACPOS Hari		Manager	4:00 PM	4:00 PM	0.00	0.00
ACPOS Sudhanshu		Manager	4:53 AM	5:30 AM	0.00	0.00
Bhushan Madan	123456	Manager	8:30 AM	3:30 PM	7.00	0.00
CreatedUser Manag...		Cashier	3:40 PM		0.00	0.00

Rows per page: 10 1-6 of 6

'Punch summary' screen - Success message

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

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

Employee POS ID — Unique ID of the employee.

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

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

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

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

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

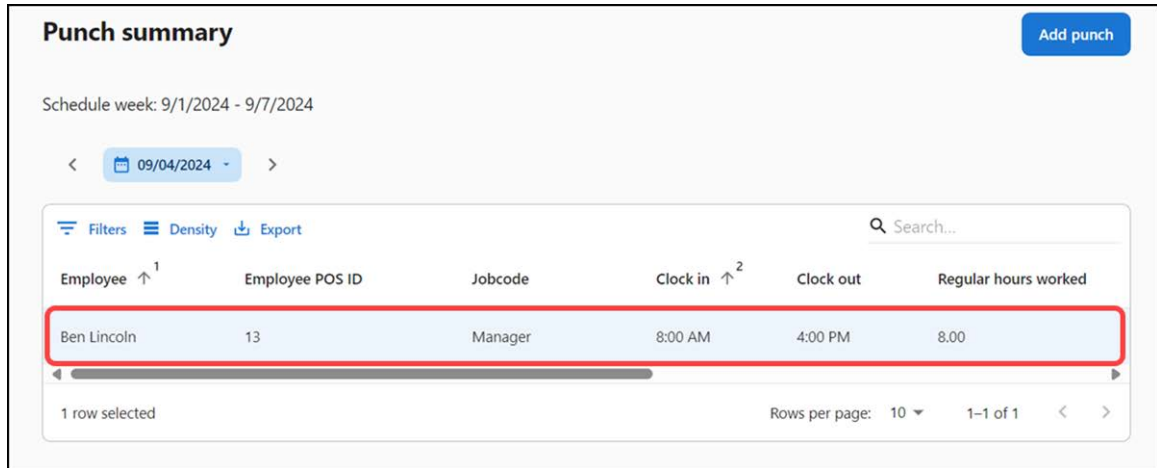
Break hours total — Total hours for which the employee took breaks for the selected date.

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

Modified by — Employee who modified the punch details.

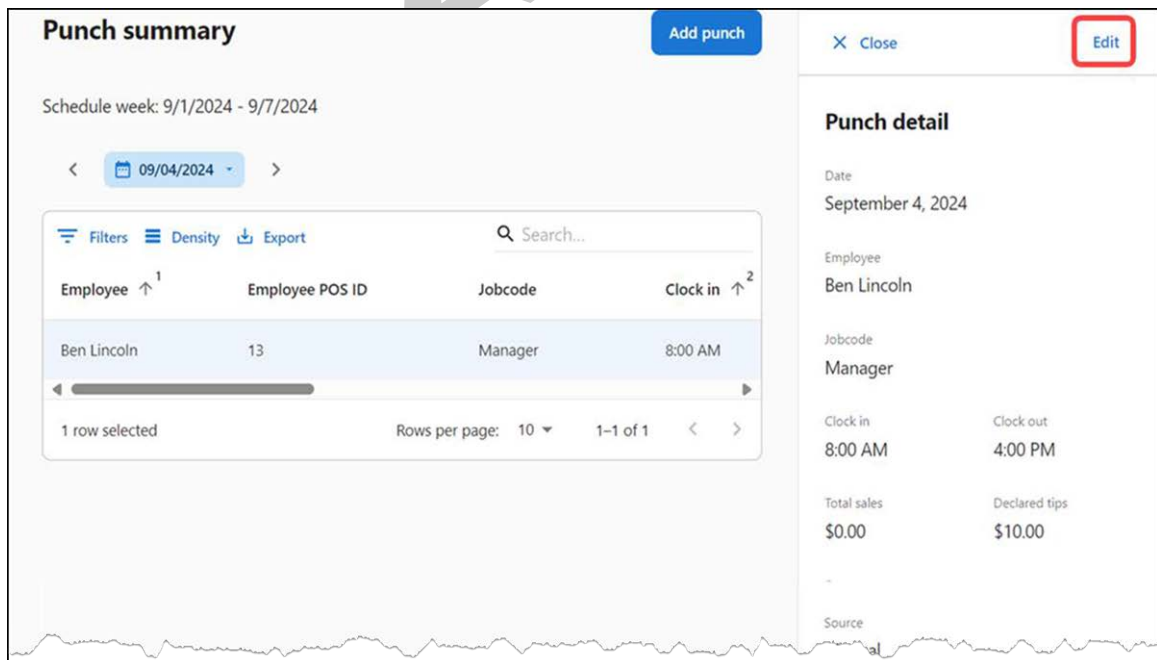
To edit a punch:

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



'Punch summary' screen

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.

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

Approaching ACA threshold

Use the 'Approaching ACA threshold' report to view the employees who are at risk of exceeding the 30-hour-per-week average mandated by the Affordable Care Act (ACA) in the United States. The report displays the average hours over a selected pay period and the hours for a single pay period. This helps the manager to monitor which employees are reaching the 30-hour threshold.

Note

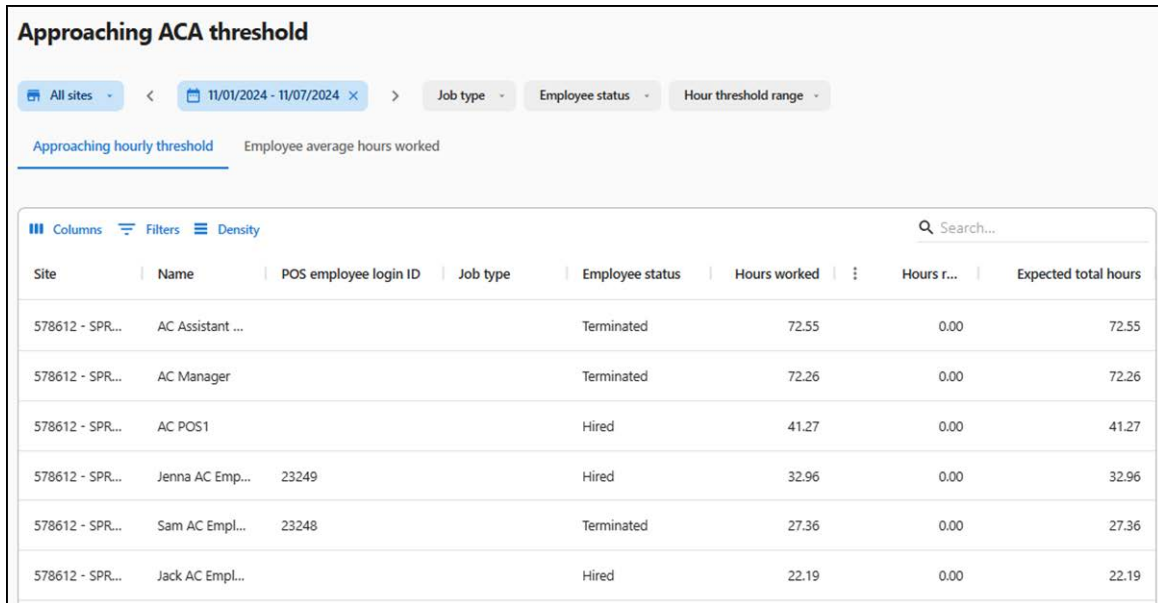
Consult your legal resources for more information on the Affordable Care Act (ACA).

The 'Approaching ACA threshold' report provides two different views:

- **Approaching hourly threshold** - Displays the actual hours worked per employee, per week, for the selected period.
- **Employee average hours worked** - Displays the average hours worked per week, for each employee.

Viewing the 'Approaching ACA threshold' report - Approaching hourly threshold view

The 'Approaching hourly threshold' report displays the employees approaching a specific threshold.



Approaching ACA threshold

All sites < 11/01/2024 - 11/07/2024 > Job type Employee status Hour threshold range

Approaching hourly threshold Employee average hours worked

Site	Name	POS employee login ID	Job type	Employee status	Hours worked	Hours r...	Expected total hours
578612 - SPR...	AC Assistant ...			Terminated	72.55	0.00	72.55
578612 - SPR...	AC Manager			Terminated	72.26	0.00	72.26
578612 - SPR...	AC POS1			Hired	41.27	0.00	41.27
578612 - SPR...	Jenna AC Emp...	23249		Hired	32.96	0.00	32.96
578612 - SPR...	Sam AC Empl...	23248		Terminated	27.36	0.00	27.36
578612 - SPR...	Jack AC Empl...			Hired	22.19	0.00	22.19

'Approaching hourly threshold' view

To run the Approaching ACA threshold report - 'Approaching hourly threshold' view:

1. With the Approaching ACA threshold report open, select the **Approaching hourly threshold** tab.
2. Select the **site** from the drop-down.
3. Select the **date range** from the drop-down.
4. Select the **job type** from the drop-down. Choose from Full time and Part time.
5. Select the **employment status** from the drop-down.
6. Select the **hourly threshold value** from these predefined ranges: All, 20-25, 25-30, and more than 30.

The following information appears in the report:

Column	Description
Site	The site where the threshold occurs.
Name	The first and last name of the employee.
POS employee login ID	The unique ID of the employee on POS.
Job type	The job type: Full time or Part time.
Employee status	The current employment status of the employee.
Hours worked	The actual hours for which the employee worked.
Hours remaining	The total remaining work hours of the employee.
Expected total hours	The total expected working hours of the employee.

Viewing the employee average hours worked report

The 'Employee average hours worked' report displays the average hours worked for each employee.

Approaching ACA threshold

All sites < 11/01/2024 - 11/07/2024 >

Approaching hourly threshold Employee average hours worked

This report displays a 6-month rolling average of hours worked based on the schedule week selected

Site	Name	POS employee login ID	Average hours worked	Week of 11/1	Week of 10/25	Week of 10/18	Week of 10/11
578612 - SPR...	AC Manager		4.70	72.26	17.05	0.00	0
578612 - SPR...	AC Assistant ...		3.82	72.55	0.00	0.00	0
578612 - SPR...	AC POS1		3.63	41.27	27.68	0.00	0
578612 - SPR...	Sankeerth M...		3.08	6.00	52.50	0.00	0
578612 - SPR...	AC Employee...	23157	2.94	8.05	5.33	42.50	0

'Employee average hours worked' view

To run the 'Approaching ACA threshold' report - 'Employee average hours worked' view:

1. With the Approaching ACA threshold report open, select the **Employee average hours worked** tab.
2. Select the **site** from the drop-down.
3. Select the **date range** from the list given on the left side of the drop-down.

The following information appears in the report:

Column	Description
Site	The site for which the report is generated.
Name	The first and last name of the employee.
POS employee login ID	The unique ID of the employee on POS.
Average hours worked	The average hours the employee worked per week during the selected date range.
YTD average hours worked	The average hours the employee worked per week in the year-to-date.

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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

All sites < 03/14/2025 - 03/20/2025 > Hour threshold range -

0 Employees exceeding overtime (over 40 hours)

0 Employees approaching overtime (30-40 hours)

7 Employees approaching overtime (less than 30 hours)

Name	Employee POS ID	Actual hours	Remaining hours	Expected total hours	Remaining hours before overtime	Next shift
ASM 1.16 Employ...		7.08	0.00	7.08	32.92	
Sreekar Aluru		0.00	0.00	0.00	40.00	
v1.16 Emp Jira 5585		0.00	0.00	0.00	40.00	
v1.16 EMP2 Jira 5...		0.00	0.00	0.00	40.00	
Manager User666		0.00	0.00	0.00	40.00	
Kevin Sun		0.00	0.00	0.00	40.00	

Columns Filters Density Search...

Rows per page: 10 1-7 of 7 < >

Approaching overtime threshold report

To run the 'Approaching overtime threshold' report:

1. Select **Labor > Reports > Approaching OT threshold**.
2. Select the **site** from the drop-down.
3. Select the **date range** from the date picker that displays the scheduled weeks.
4. Select the **hourly threshold range** from the drop-down, if needed.

The data appears in three tiles:

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

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

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

Name	Employee POS ID	Actual hours	Remaining hours	Expected total hours	Remaining hours before overtime	Next shift
Hannah Fin		0.87	0.00	0.87	39.13	
Kevin Sun		0.00	0.00	0.00	40.00	
CreatedUser Man...		0.00	0.00	0.00	40.00	
CREATEDUSER A...		0.00	0.00	0.00	40.00	
Katie 1.16 AC Em...		0.00	0.00	0.00	40.00	

Employee OT threshold - Tabular report

The following information appears in the report:

Column	Description
Name	The name of the employee.
Employee POS ID	The unique ID of the employee on POS.
Actual hours	The total hours the employee is expected to work based on actual plus remaining.
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 difference between expected and 40 hours
Next shift	The next shift assigned to the employee.

Employee payroll

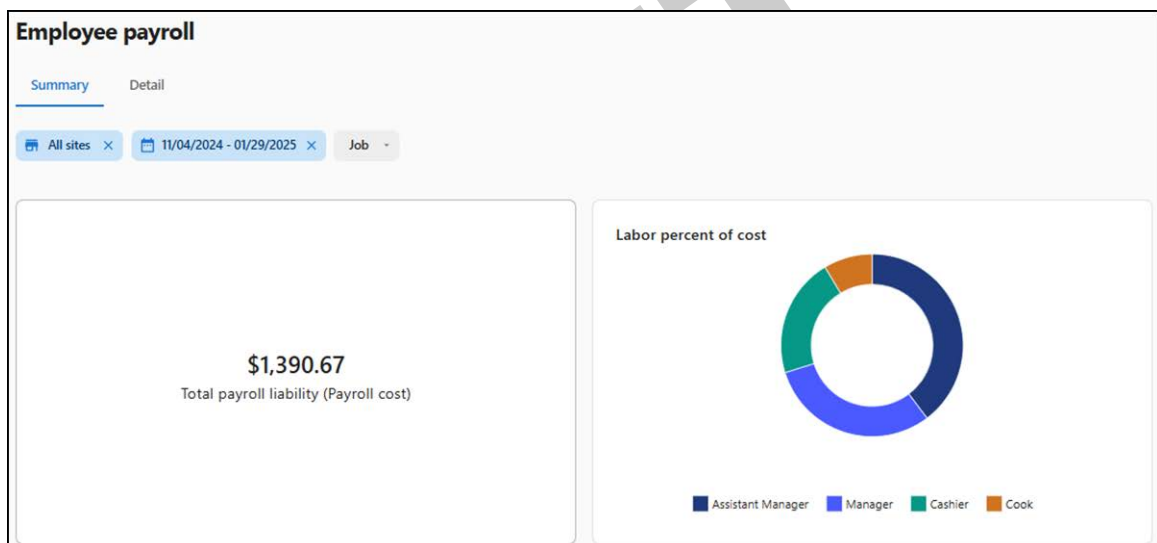
Use the 'Employee payroll' report to view employee payroll information for a selected pay period. The summary section of the report displays the hours and dollars by job, and any overtime or penalty pay earned by the employee. The detail section of the report displays information for individual punches.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

The 'Employee payroll' report provides two different views:

- **Summary** - Displays the total for the pay period by employee and job.
- **Detail** - Displays the total for the pay period by employee and job by individual shifts.

Viewing the 'Employee payroll' report - Summary view

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



'Summary' view

To run the 'Employee payroll' report - Summary view:

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

The following details appear in the tiles:

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

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

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

Name	Employee POS ID	Job	Pay rate	Total hours	Total wages	Regular hours	Regular wages	Overt
ACPOS Hari		Manager	\$9.00	22.00	\$198.00	22.00	\$198.00	
ACPOS Sudhanshu	24074	Manager	\$9.00	1.67	\$15.05	1.67	\$15.05	
April 1 v1.16 Mana...		Manager	\$15.20	4.00	\$60.80	4.00	\$60.80	
Don Bradman	553606	Manager	\$78.00	0.02	\$1.78	0.02	\$1.78	
Jack AC Employee ...		Cashier	\$15.50	6.38	\$98.94	6.38	\$98.94	
Jenna AC Employee...	23249	Cashier	\$20.25	7.42	\$148.83	7.35	\$148.83	
Jenna AC Employee...	23249	Bartender	\$20.00	0.09	\$1.76	0.09	\$1.76	
Katie 1.16 AC Emp...		Cocktail	\$25.00	47.00	\$1,175.00	47.00	\$1,175.00	
Kevin Sun		Manager	\$30.00	0.11	\$3.34	0.11	\$3.34	
Rachel AC Employ...	23290	Cashier	\$12.00	0.29	\$3.44	0.29	\$3.44	

'Detail' view

The following information appears in the report:

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.
Total hours	The total number of hours the employee worked.
Total wages	Total amount paid to the employee.
Regular hours	The total number of regular hours worked.
Regular wages	The salary of the employee.
Overtime hours	The hours the employee worked as overtime.
Overtime wages	The amount paid to the employee for working overtime.
Premium hours	The hours the employee worked overtime.
Premium wages	The amount paid to the employee for working overtime.
Total net sales	The amount of sales belonging to that particular employee.
Declared tips	The total amount of tips declared.
Total tips	Total tips paid through the POS.
Tip percent	The percentage of tips amount.

To run the 'Employee payroll' report - Detail view:

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

The following details appear in 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).

The following information appears in the report:

Column	Description
Name	Name of the employee.
Employee POS login ID	The unique ID of the employee on POS.
Business date	The date of transaction.
Job	The job under which the employee worked.
Pay rate	The pay rate for the job under which the employee worked.
Clock in	Employee clock in time.
Clock out	Employee clock out time.
Break type	Specifies the type of break the employee had.
Total hours	The total number of hours the employee worked.
Total wages	Total amount paid to the employee.
Regular hours	The total number of regular hours worked.
Regular wages	The salary of the employee.
Overtime hours	The hours the employee worked as overtime.
Overtime wages	The amount paid to the employee for working overtime.
Premium hours	The hours the employee worked overtime.
Premium wages	The amount paid to the employee for working overtime.
Total net sales	The amount of sales belonging to that particular employee.
Declared tips	The total amount of tips declared.
Total tips	The total amount of tips.
Tip percent	The percentage of tips amount.

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 69.](#)
- **Vendors** — [See "Working with vendors" on page 78.](#)
- **Invoices** — [See "Working with invoices" on page 91.](#)
- **Invoice history report** — [See "Viewing invoice history report" on page 99.](#)

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Working with raw items

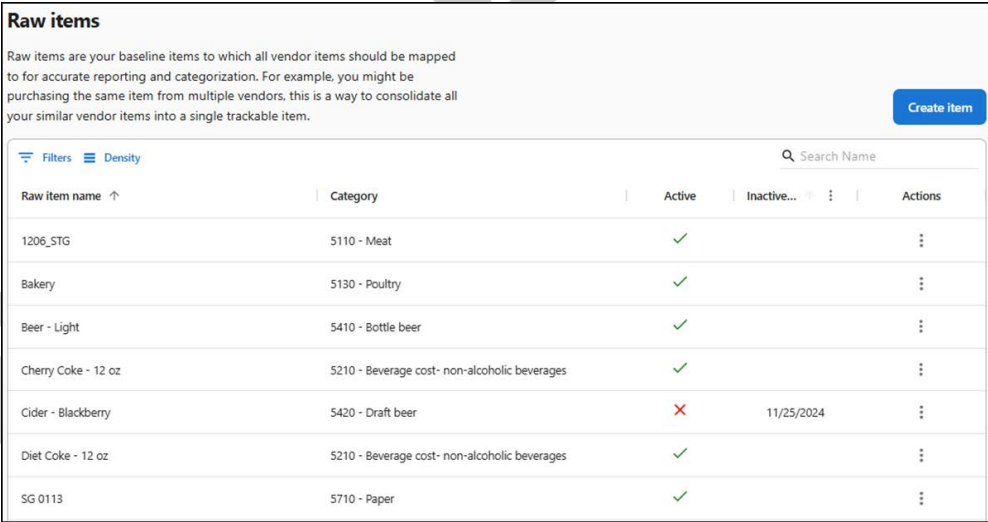
A raw items, also referred to as raw material, are your baseline items, such as the ingredients needed to prepare a finished product for sale to your consumers. Common examples include sugar, salt, chicken, beef, bread, tomatoes, onions, and much more.

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

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

To create a raw item:

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



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

Filters Density Search Name

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

'Raw items' screen

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

Create raw item

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

Step 1 out of 3: General information

Create a raw item and associate it to vendor items.

* Indicates required fields

General information

Active item

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

Raw item name *

Category *

Assign vendor items to raw item

Filters | Density | Export | Search...

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

Current selection Clear selection

0 items selected

Cancel | Save & exit | Save & next

'Create raw item' screen

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

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

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

Assign vendor items to raw item

Filters Density
Search...

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

Cancel
Save & exit
Save & next

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



Reference

Refer to [page 85](#) for instructions on using the 'Assign vendor items to raw item' feature.

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

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

'Receive & inventory units' step

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

Industry Custom

Industry unit *

Gram

Ounce

Milligram

Kilogram

Pound

Gram

'Add new inventory unit' screen

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

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

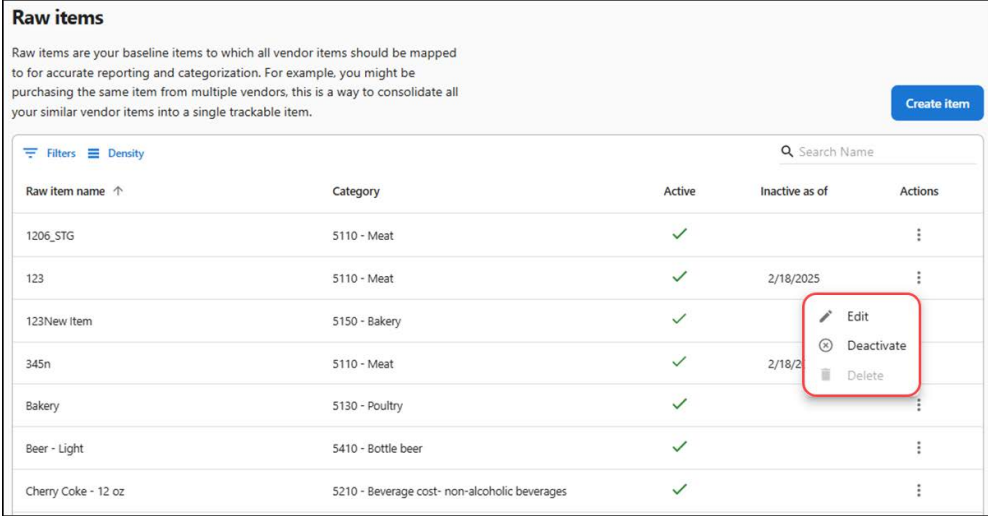
'Reporting & recipes' step

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

To edit a raw item:

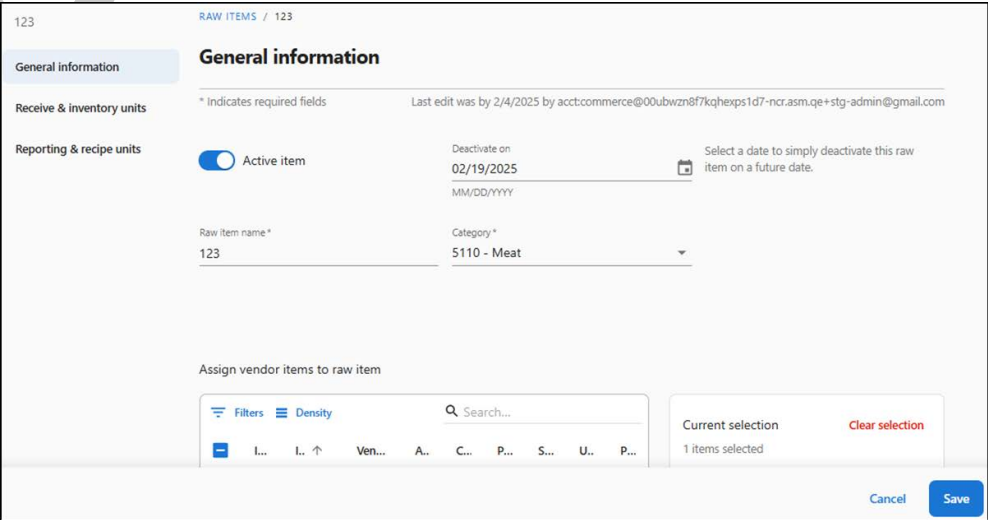
When you edit an existing raw item, the defined steps that appear at the top of the screen during the creation process are moved to the left side of the screen as tabs for ease of use; however, the information between the two experiences is identical. During the editing process, you can access the tabs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

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



Edit a raw item

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



'General information' screen

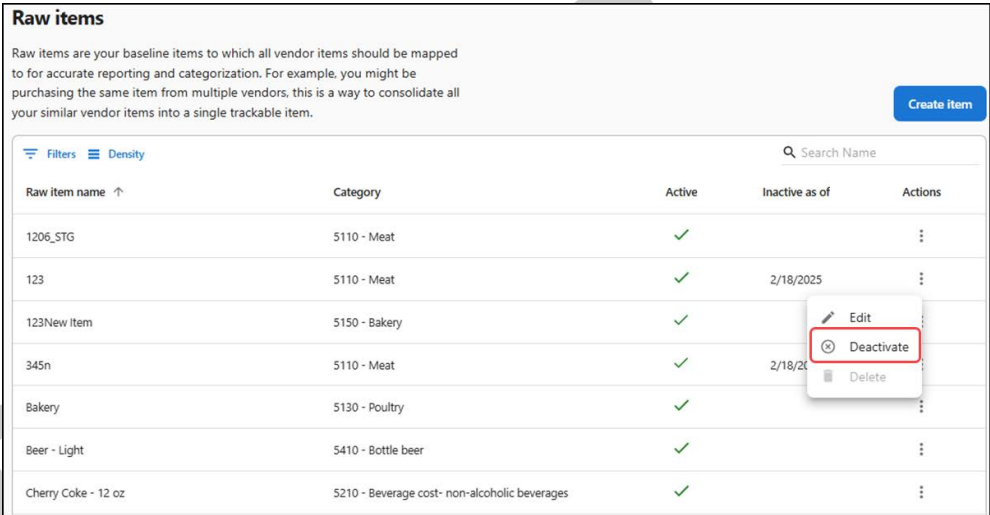
- 3. Use the navigation available on the left of the screen to move through the steps and make the necessary **edits**.
- 4. Click **Save**. A success message appears and automatically dismisses. The raw item is updated with the modifications.
- 5. Click **RAW ITEMS** at the top of the screen to return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

To deactivate a raw item:

Note

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

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



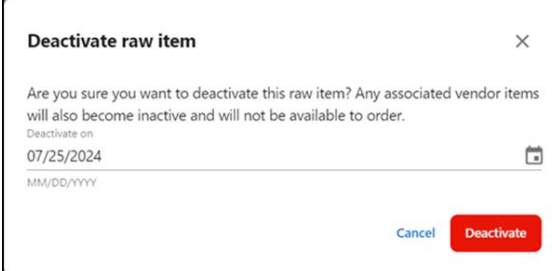
Raw items are your baseline items to which all vendor items should be mapped to for accurate reporting and categorization. For example, you might be purchasing the same item from multiple vendors, this is a way to consolidate all your similar vendor items into a single trackable item.

Filters Density Search Name

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

Deactivate raw items

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



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

'Deactivate raw item' confirmation message

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

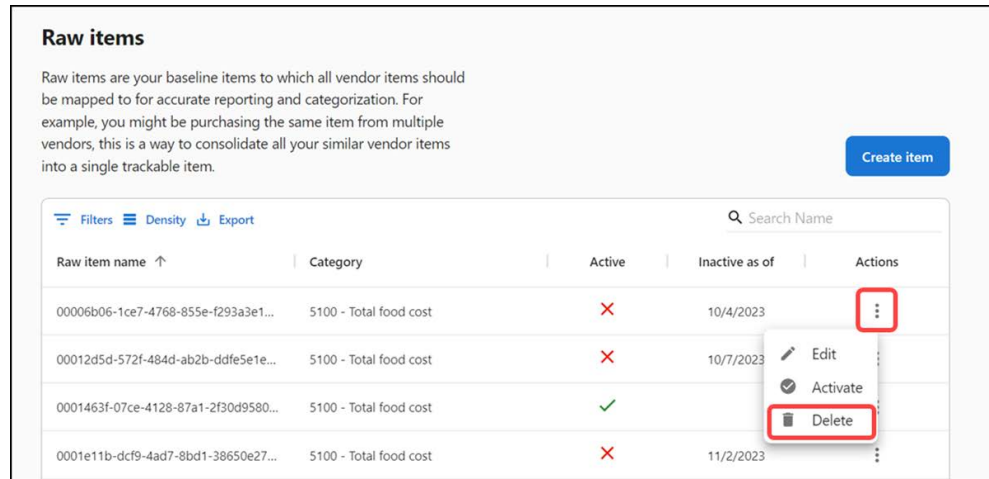
DRAFT

To delete a raw item:

Note

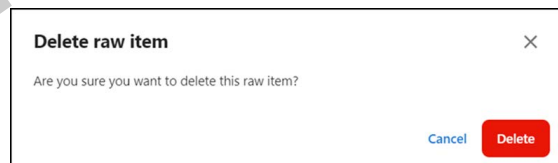
You are not allowed to delete a raw item when it is linked to a vendor item.

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



Delete raw item

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



'Delete raw item' confirmation

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

Working with vendors

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

Vendors

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

[Add vendor](#)

Columns Filters Density Search Name

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

Adding vendor

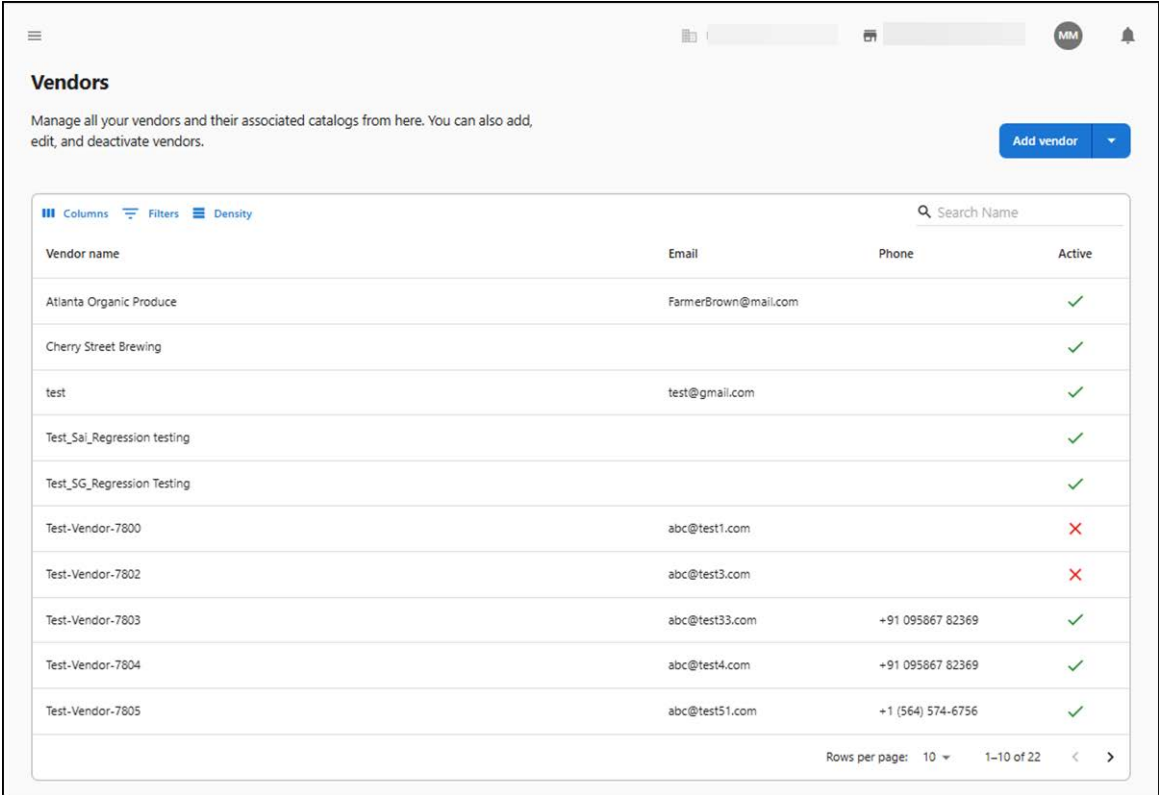


Reference

For information on using a .CSV file to upload vendors in bulk, refer to [page 165](#).

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

(* Indicates required fields)

Active vendor

Vendor name* A/P Code

Country

Street address Apartment/Suite

City State Postal code

Vendor contact

Contact name Contact title Phone number

Email address Customer account number

More details

Comments

Back Save

'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 'Street address' and 'Apartment/Suite.'
8. Type the **city, state,** and **postal code** of the location of the vendor.
9. Under the 'Vendor contact' group bar, type the **contact name** of the vendor, typically a vendor employee.
10. Type the **designated title, phone number,** and **email address** of the vendor contact.
11. Type your **customer account number** associated with the vendor.

12. Under the 'More details' group bar, enter any **additional information** about the vendor in 'Comments.'
13. 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 82](#).

To edit a vendor:

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

DRAFT

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 85](#).

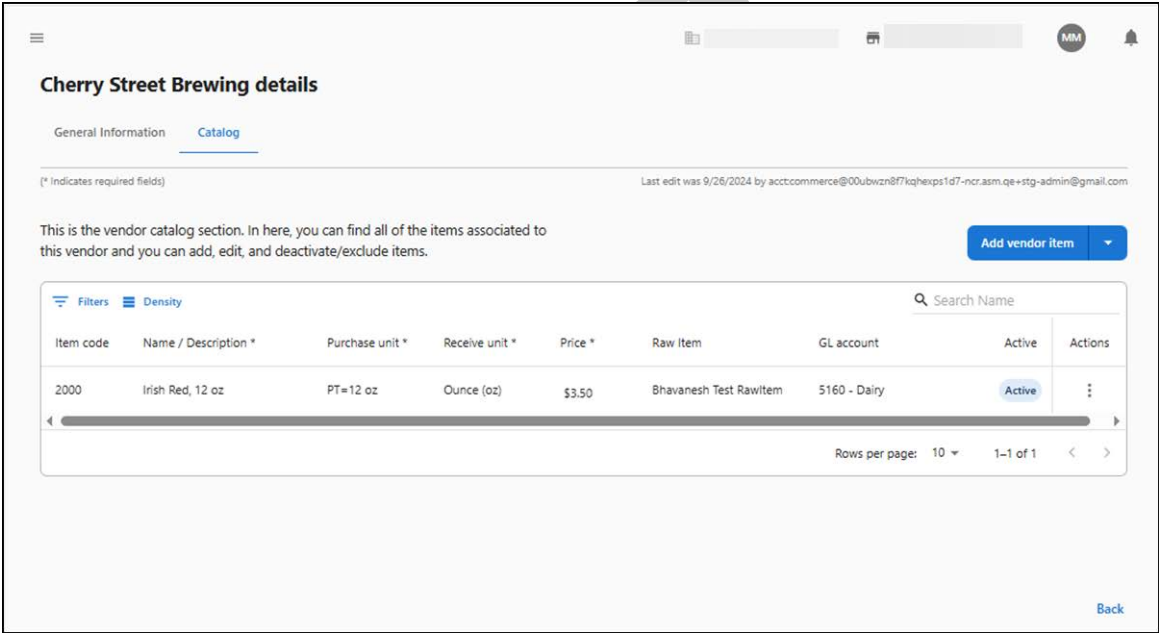


Reference

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

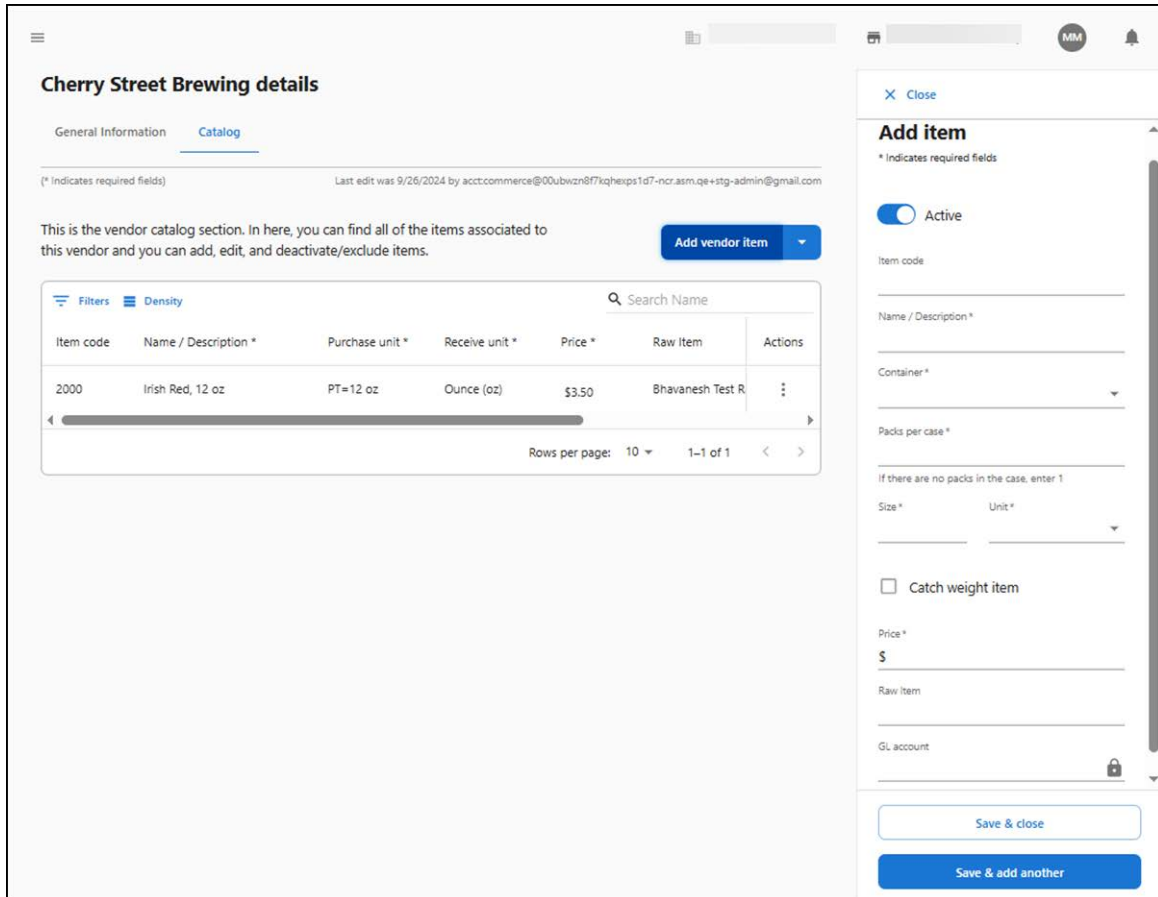
To manually add a vendor item:

1. With the vendor that sells the item active on the screen, select the **Catalog** tab.



'Catalog' tab

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



'Add item' screen

- Type the **vendor item code**, up to 50 characters.
- Type the **name of the item**, up to 250 characters.
- 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).
- Type the **total quantity of packs** in the vendor item container in 'Packs per case.' This must be a numeric value from 1-999. If there are not packs in the case, type 1.
- Type the **actual size of each unit** in the package. This must be a numeric value from 1 to 999, and supports up to two decimals.
- Select the **standard unit of measurement** of the item from the 'Unit' drop-down list. 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).

9. Verify **Catch weight item** is not selected as it is currently not supported.
10. Type the **unit price** of the vendor item container. It must be a numeric value (up to two decimals).
11. Select the **raw item** to associate with this vendor item from the 'Raw item' drop-down list. If the raw item you need does not appear in the list, you can select 'Unassigned' to allow you to save the vendor item. It appears as Unassigned in the vendor item grid. You must then access the Raw item function and associate the raw item to the vendor item using that function.



Tip

'GL account' is populated based on the configuration of the raw item and is informational only.

12. Click **Save & close** to save the changes.
-OR-
Click **Save & add another** to add another item to the vendor.

The screenshot shows the 'Catalog' tab in the vendor management system. It includes a search bar, a table of items, and an 'Add vendor item' button. The table has columns for Item code, Name / Description, Purchase unit, Receive unit, Price, Raw Item, and Actions. One row is highlighted with a red border.

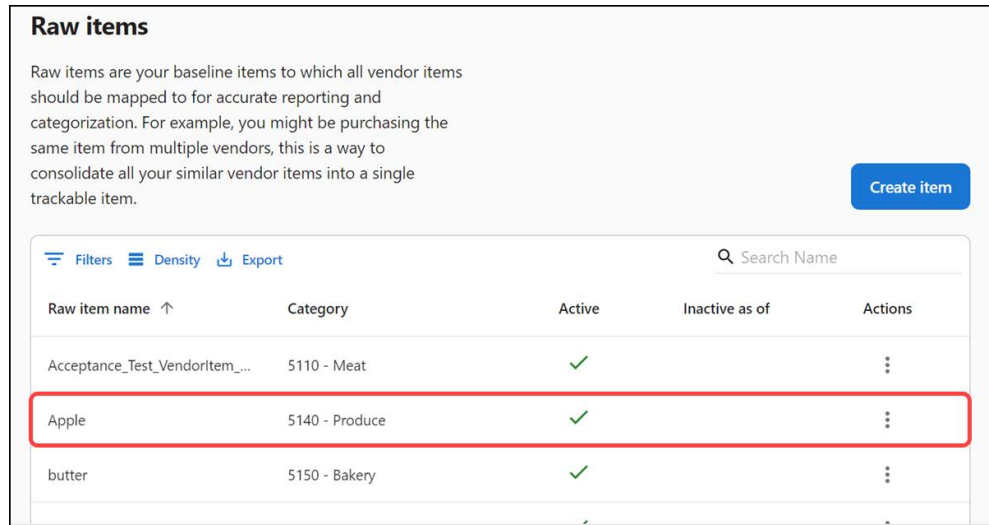
Item code	Name / Description *	Purchase unit *	Receive unit *	Price *	Raw Item	Actions
8383	Milk Bread	BG=1 ea	Each (ea)	\$5.00	butter	⋮

Manually added vendor item

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

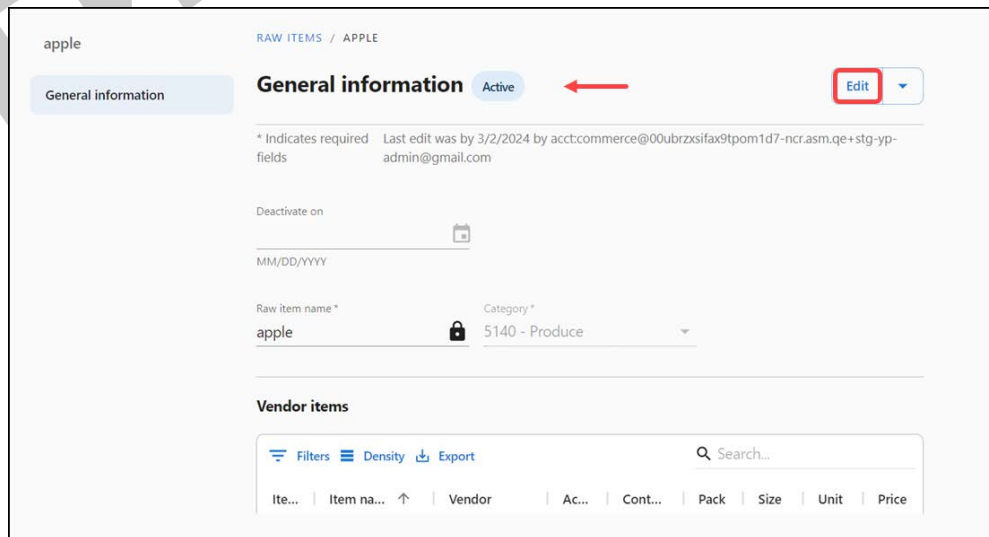
As an alternate method to working in the Vendors function, you can use the Raw Items function to associate a raw item with a vendor item. The vendor item must already exist.

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



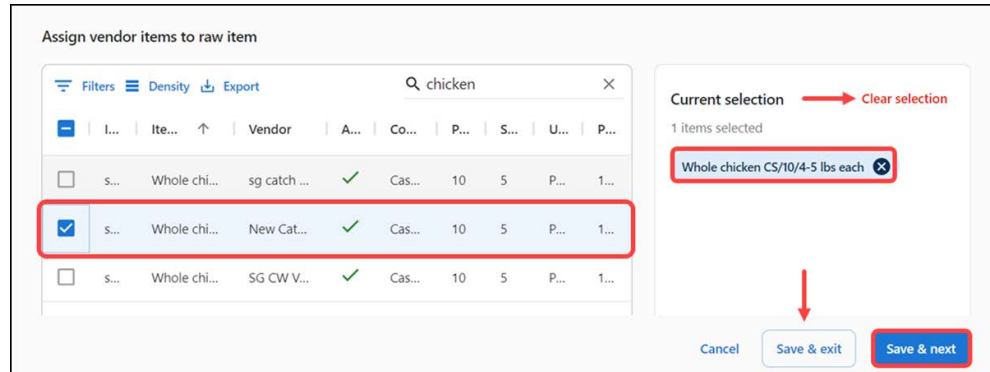
'Raw items' screen

2. Select a **raw item** from the list.
3. Click the **three dots** menu under **Actions** and select **Edit** from the menu that appears. The 'General information' screen appears.



'General information' screen

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



'Assign vendor items to raw item' group bar

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

To edit a vendor item:

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

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

Vendor selection

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

Coca Cola Company details

General Information | Catalog

(* Indicates required fields) Last edit was 2/4/2025 by acctcommerce@00ubivanz8f7kqhexps1d7-nr.asm.qe-stg-admin@gmail.com

Active vendor

Vendor name * Coca Cola Company A/P Code

Country United States

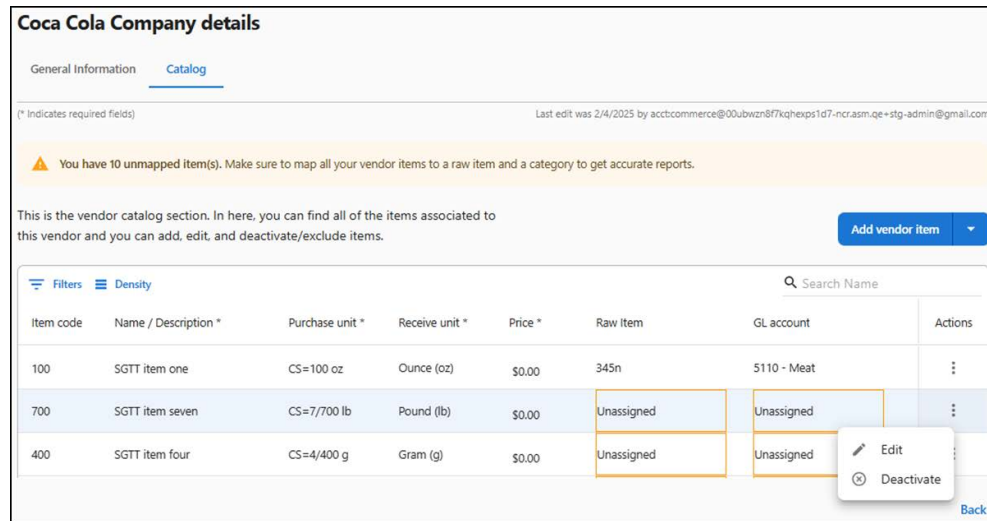
Address 1 Coca Cola Way Apartment/Suite

City Atlanta State Georgia Postal code 30303

Back Save

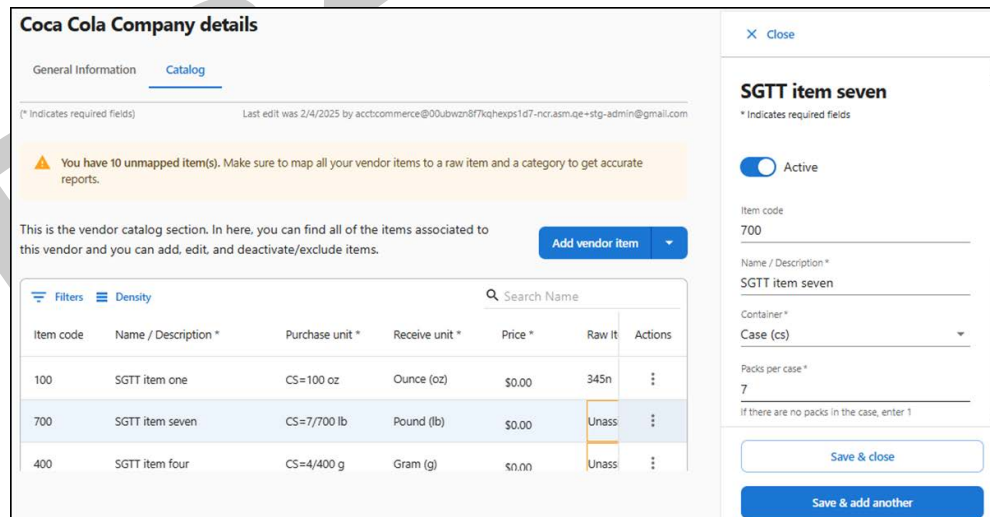
'General information' tab

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



Edit vendor item

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



Edit vendor item options

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

To deactivate a vendor item:

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

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

Vendor selection

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

Coca Cola Company details

General Information | Catalog

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

Active vendor

Vendor name * A/P Code

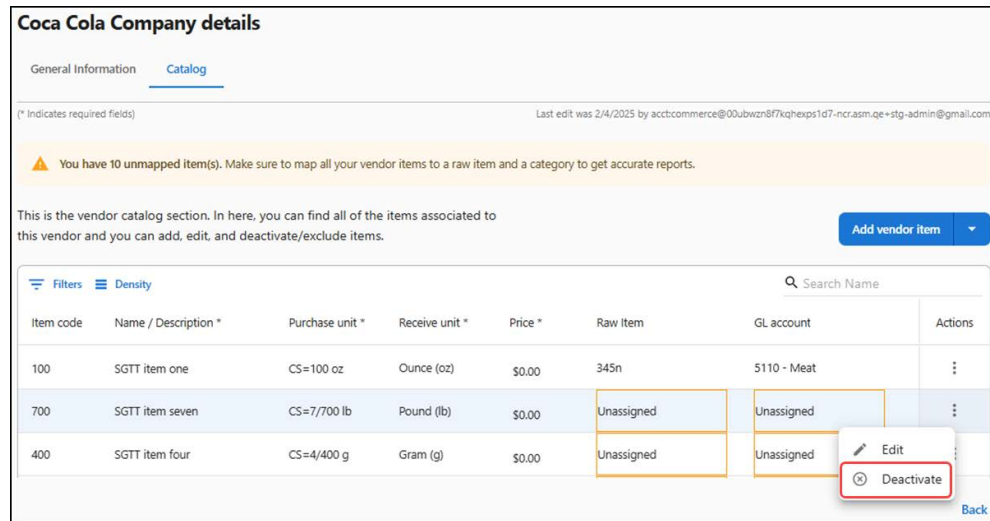
Country

Address Apartment/Suite

City State Postal code

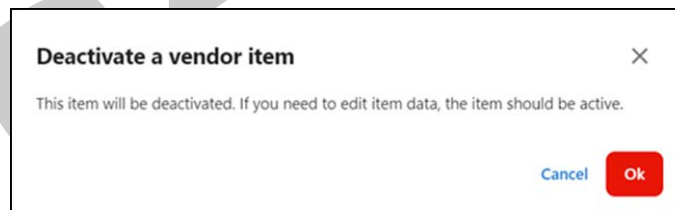
'General information' tab

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



Vendor details 'Catalog' tab

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



Deactivate confirmation message

6. Click **OK** to confirm.

Working with invoices

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

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

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

Invoice approval process

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

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

Capturing invoice details

You can capture invoice details using two different methods:

- Manually adding the invoice details. See [page 91](#).
- Uploading a digital image of the invoice. If you upload a PDF, each PDF page is converted to an image file. See [page 176](#).

Manually adding an invoice

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

To manually add an invoice:

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

Invoice list

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

Invoices Incomplete uploads Add invoice (blank)

Filters Density Search Invoice ID

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

'Invoice list' screen

DRAFT

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

Invoice details

* Indicates required fields

Invoice information

Invoice date *
02/05/2025

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

Invoice ID *
Invoice comments

Vendor information

Vendor name *

Add item

Filters Density Search...

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

Subtotal \$0.00

Sales tax \$0.00

Amount payable \$0.00

Back

'Invoice details' screen

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

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

Invoice information

Invoice date* 02/05/2025 Invoice delivery date and time* 02/05/2025 12:05 PM

Invoice ID* 359 Invoice comments

Vendor information

Vendor name*

bgjhfhk
Cherry Street Brewing
Coca Cola Company
Dallas Organic Produce
Node js test vendor (imported)
Smoke Test 01
test
test0808

Add item

Search...

Name / Description	Receive unit	Quantity	Price	Subtotal	Tax	Total	Actions
--------------------	--------------	----------	-------	----------	-----	-------	---------

Back

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 details Draft Delete invoice

* Indicates required fields Last edit was 7/26/2024 by acct:commerce@00uepuczdxix5iwtz1d7-lm185162@ncr.com

Invoice information

Invoice date* 07/26/2024 Invoice delivery date and time* 07/26/2024 03:27 PM

Invoice ID* 8325 Invoice comments

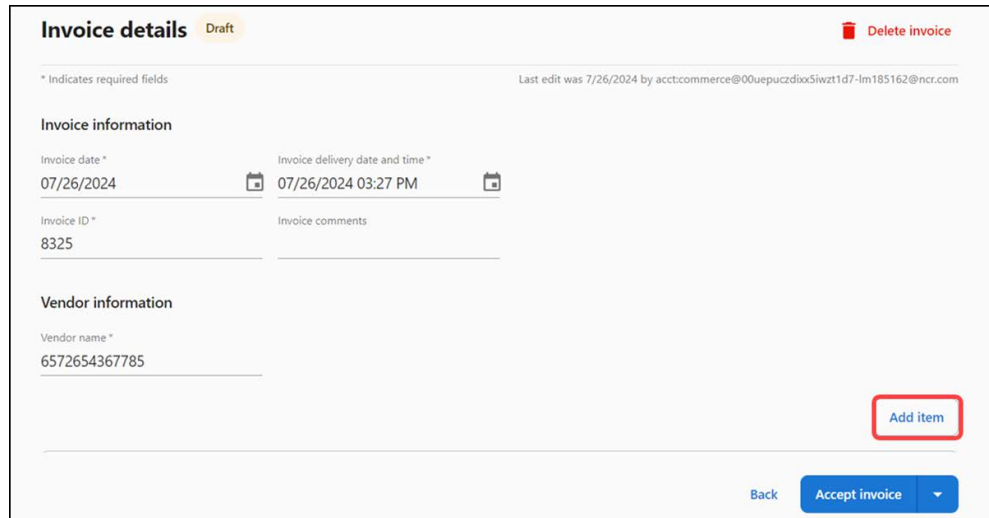
Vendor information

Vendor name* 6572654367785

Accept invoice
Finalize invoice

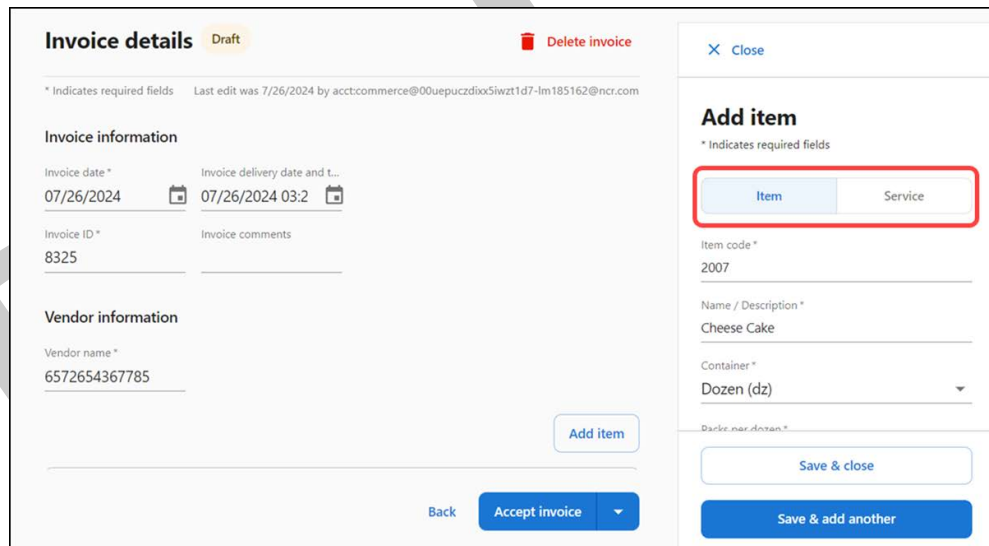
Back Accept invoice

Invoice record saved as Draft



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:

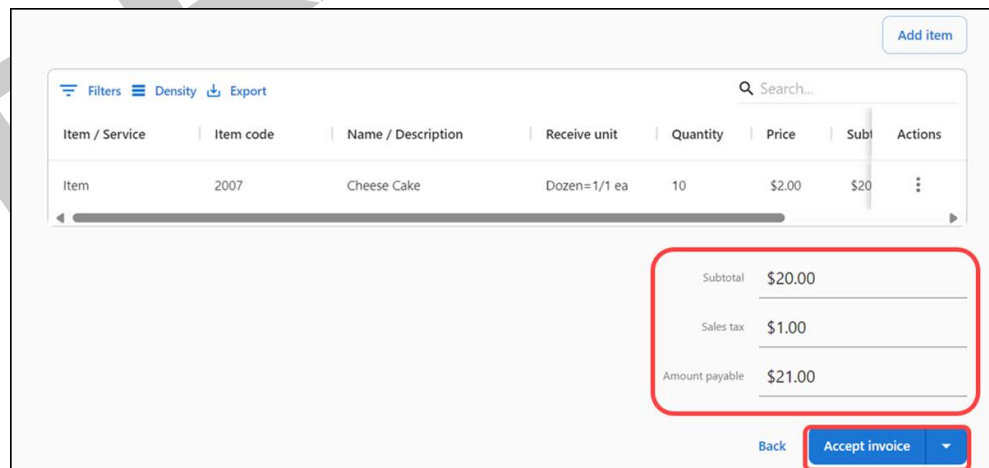
Item — Indicates the item is a product purchased from the vendor, such as egg or milk.

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

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

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

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



Added invoice items and services

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

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

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

Accepted invoice

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

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

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

Finalized invoice

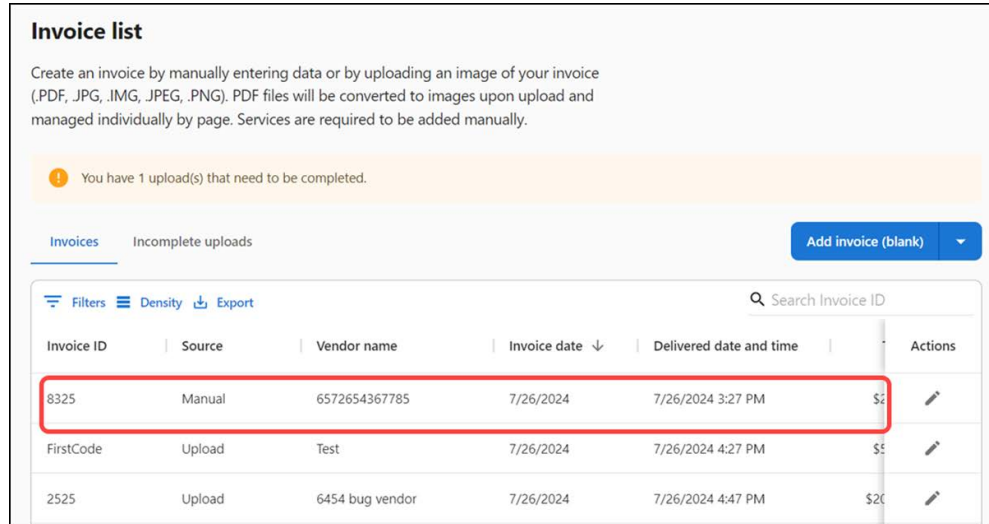
Note

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

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

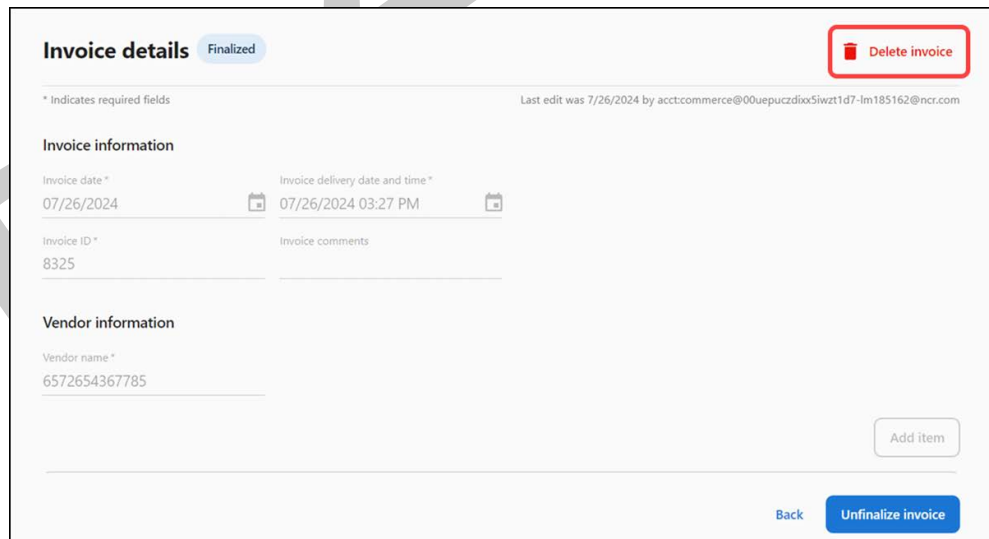
Deleting an invoice

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



'Invoice list' screen

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



'Invoice details' screen

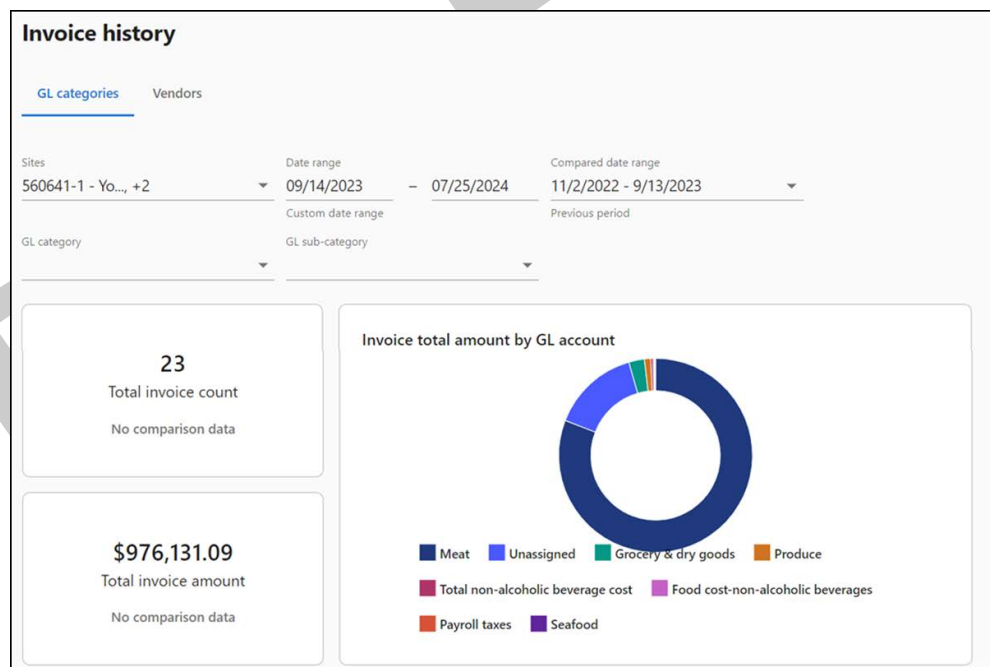
3. Click **Delete invoice**. A confirmation message appears allowing you to confirm the invoice deletion.
4. Click **Delete** to confirm.

Viewing invoice history report

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

To run invoice history report of GL categories:

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



Invoice history report - GL categories

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

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

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

Invoice history report details

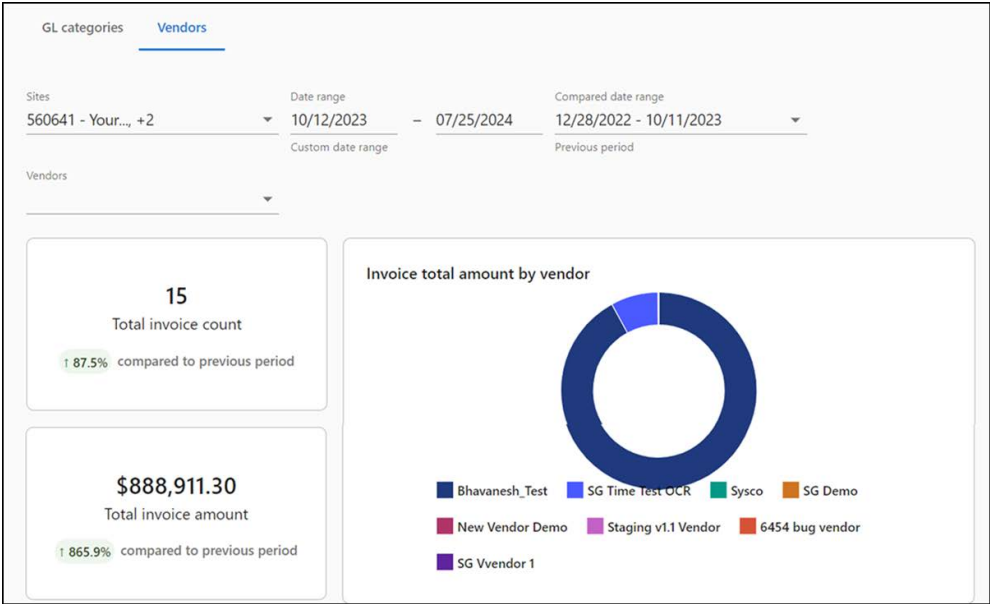
The following information appears in the report:

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

To run an 'Invoice history report' of Vendors:

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

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



Invoice history report - Vendors

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

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

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

The following information appears in the report:

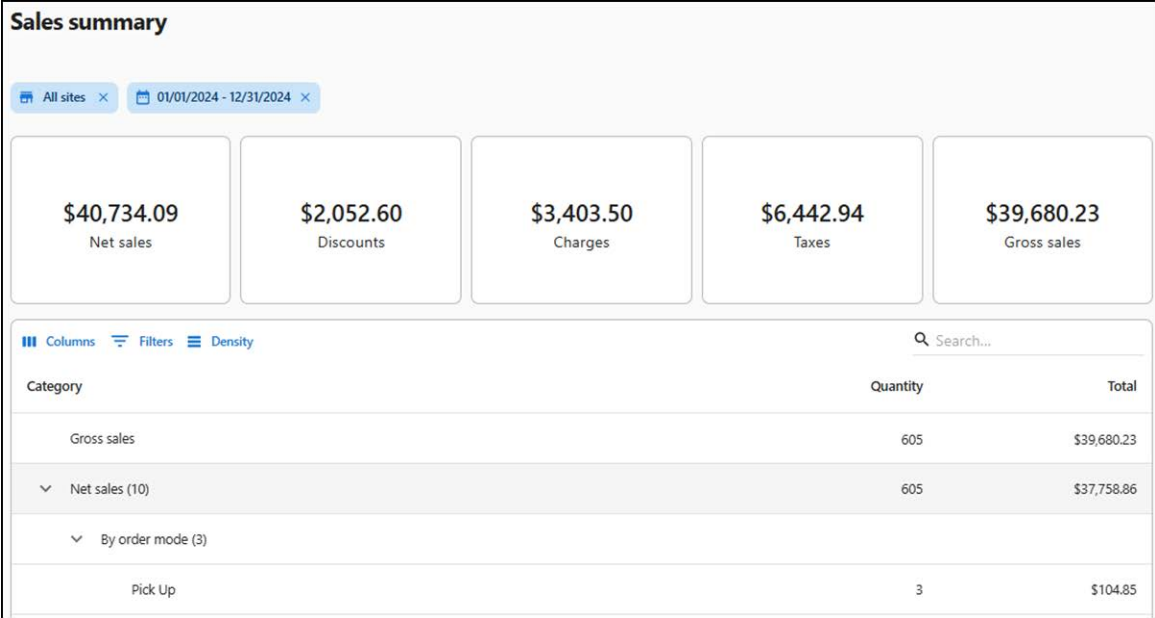
Column	Description
Vendor	Name of the vendor.
Invoice count	The total count of invoices.
Subtotal	The subtotal of the invoices excluding the tax amount.
Sales tax	The amount of the sales tax applied.
Total	The total amount of the sale (subtotal + sales tax).

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About Sales

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

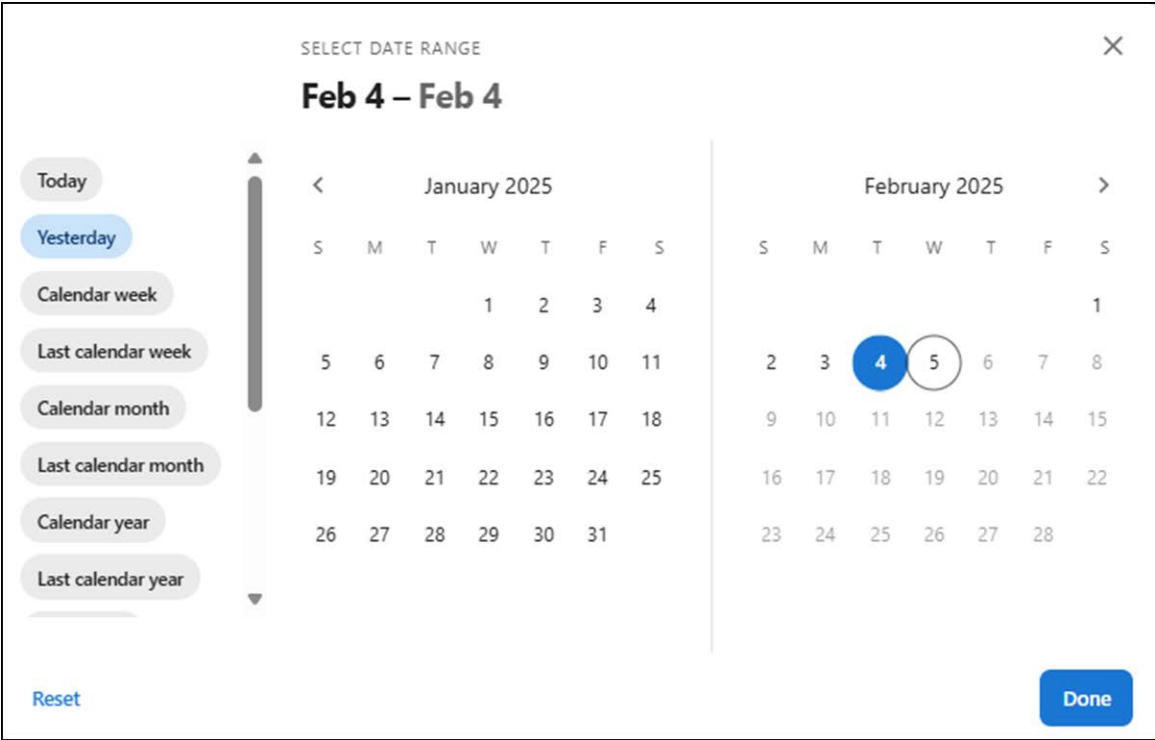
Each sales report defaults to the previous day.



'Sales summary' landing page

Calendar

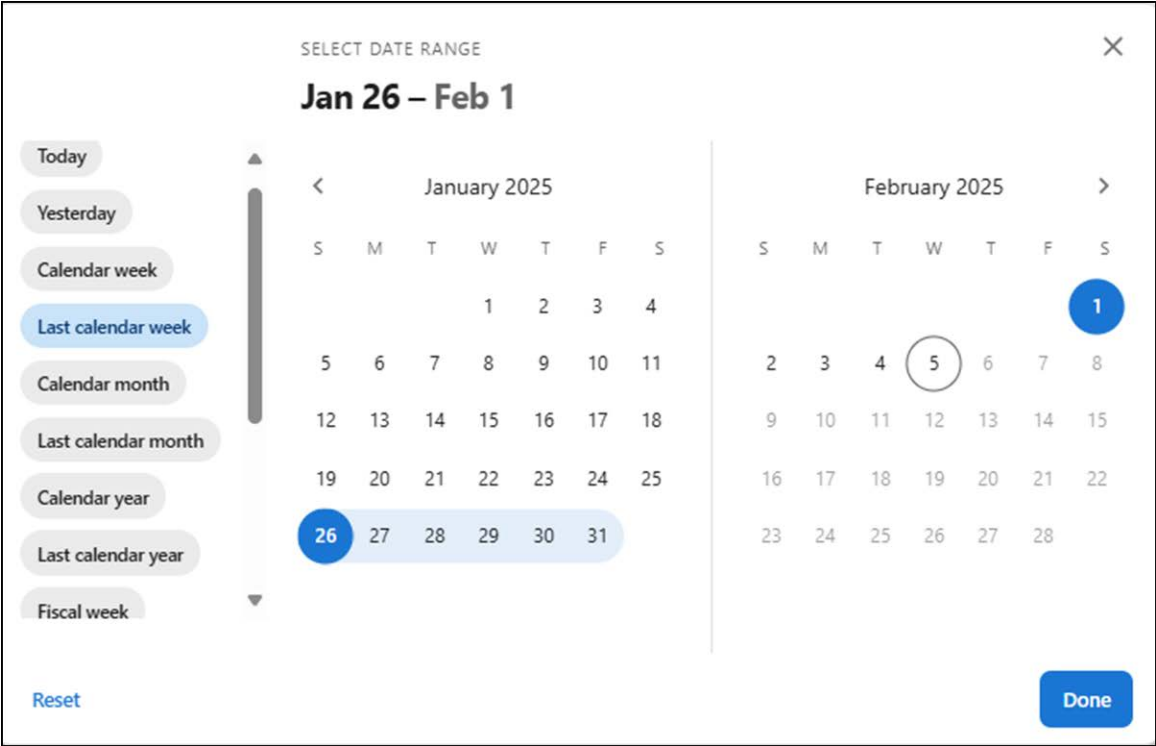
Use the 'Calendar' option to pick a specific date or week. For instance, while working with invoices, select a specific date to generate the invoice; whereas, while working on scheduling, pick a specific week.



Calendar control to select a date

Date range selections

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



Date range selection

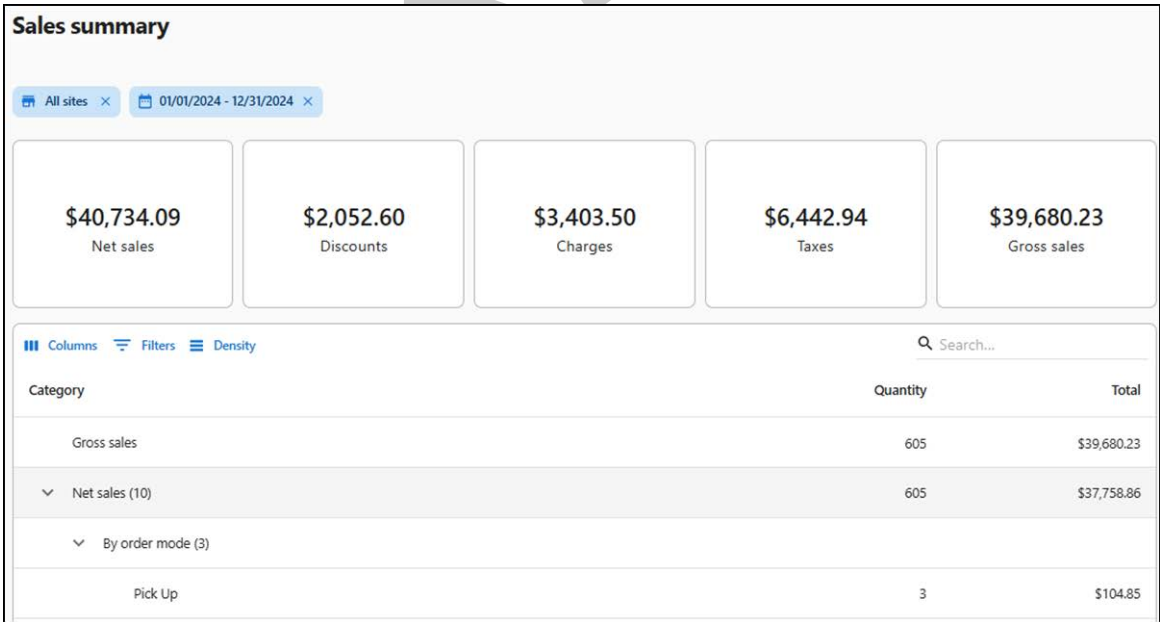
Working with sales reports

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

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

Sales summary

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



'Sales summary' report

To run the 'Sales summary' report:

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

The screenshot shows the 'Sales summary' report interface. A modal window titled 'Site' is open, allowing users to select sites. The modal includes a 'Select all Sites' toggle and a list of sites with checkboxes. The background shows a summary card with 'Gross sales' of \$39,680.23 and a table with columns 'Quantity' and 'Total'.

Quantity	Total
605	\$39,680.23
605	\$37,758.86
3	\$104.85

'Sales summary' - Site options

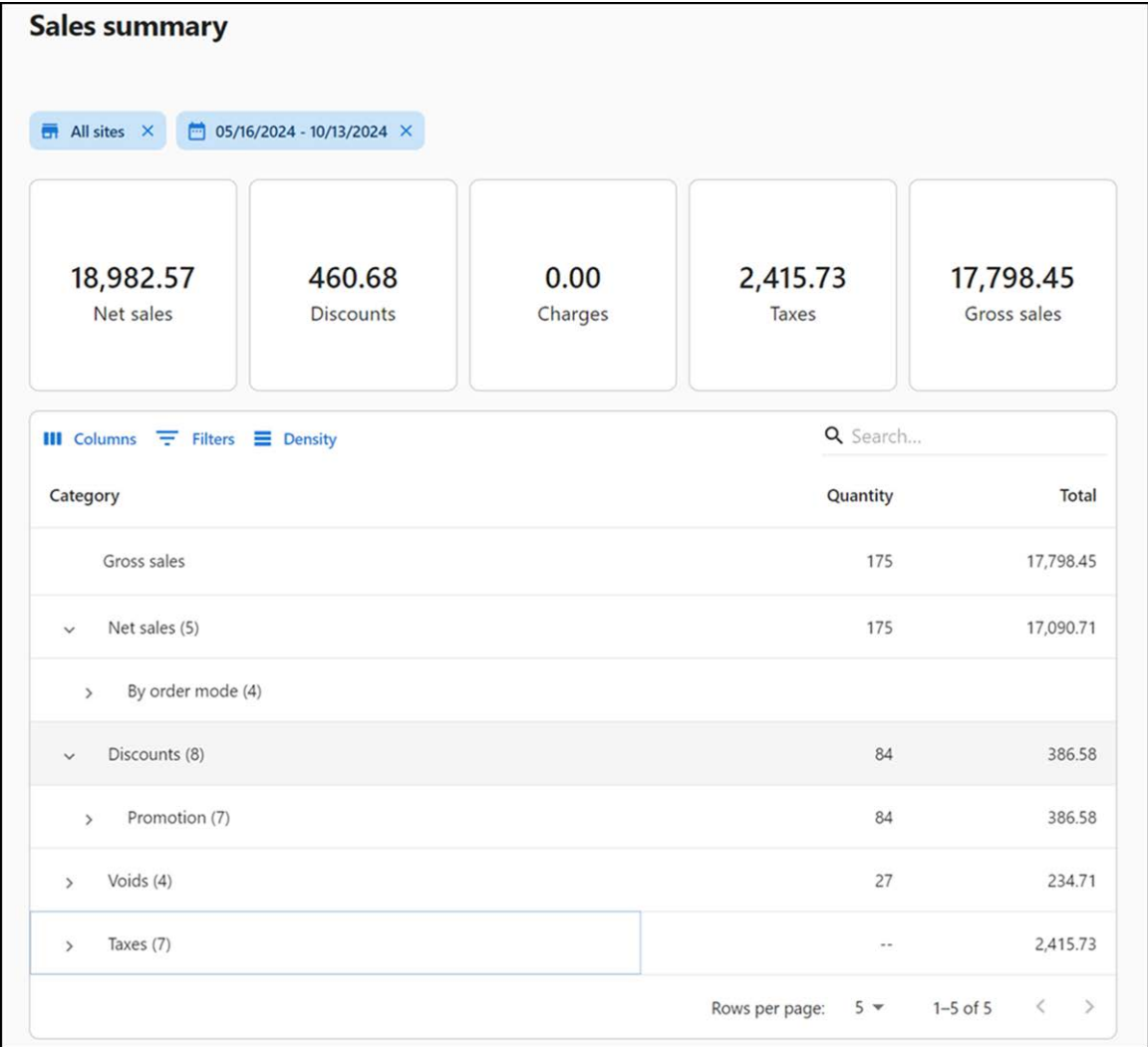
2. Select a **site** from the drop-down list.
-OR-
Click **Select all Sites** to view the 'Sales summary' for all sites.

Note

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

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

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



'Sales summary' report tiles

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

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

Charges — Displays the total amount of additional charges.

Taxes — Displays the total amount of taxes assessed.

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

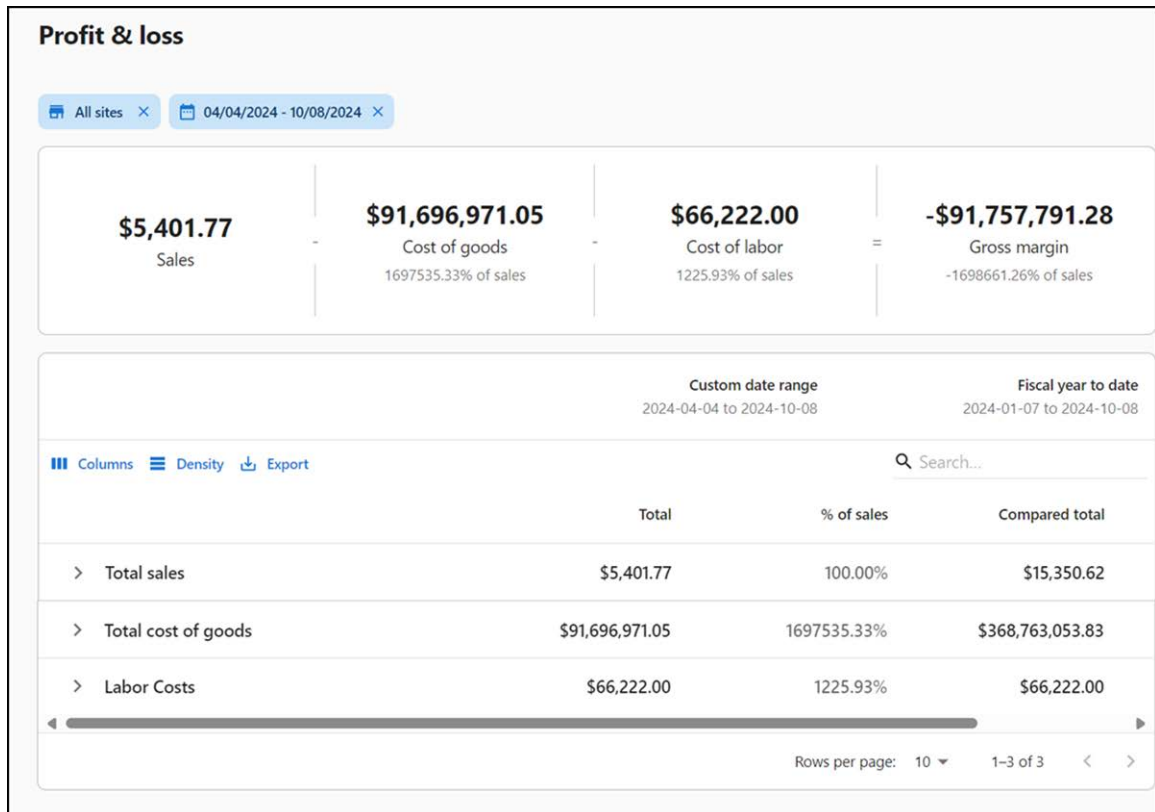
The following information appears in the report:

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

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Profit & loss

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



'Profit & loss' report tiles

To run a 'Profit & loss' report:

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

4. Select a **date range**.

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

'Profit & loss' report



Note:

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

The report dynamically updates with each selected parameter.

Reporting data appears on the following tiles.

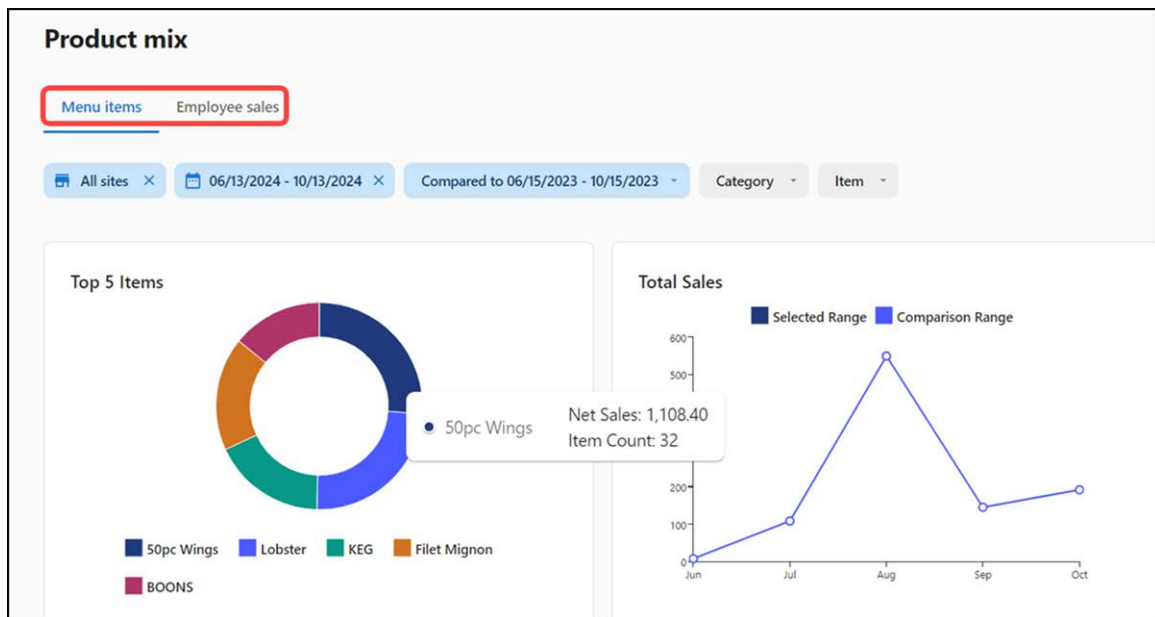
Row	Description
Total sales	Displays the total and percentage of sales. This is net sales and will break down by sales category as you drill down.
Total cost of goods	Displays the total amount the restaurant paid as a cost directly related to the sale of products. This is based on invoices entered and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

Row	Description
Compared total	Displays the total compared to the fiscal year. See “Configuring the fiscal calendar” on page 152 .
Compared % of sales	Displays the percentage of sales compared to the fiscal year.

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Product mix

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

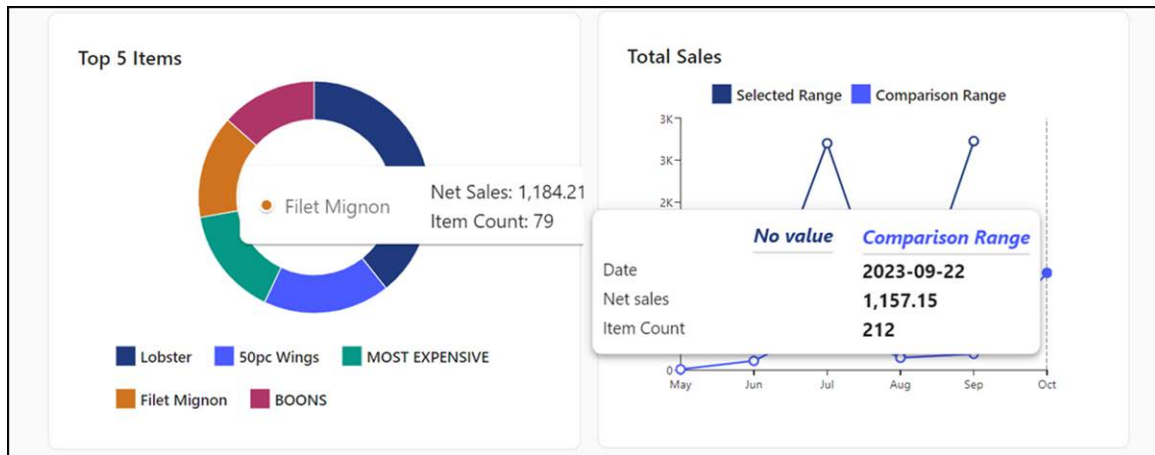


'Product mix' report - 'Menu items' view

The 'Product mix' report offers two views:

- Menu items
- Employee sales

'Menu items' view



'Product mix' report - 'Menu items' view

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.

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

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

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

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

List modifiers with item sold

Columns
Filters
Density
Search...

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

Rows per page: 10 ▾ 1-6 of 6 < >

'Product mix' report - 'Total sales' view

The following information appears in the report:

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



Note

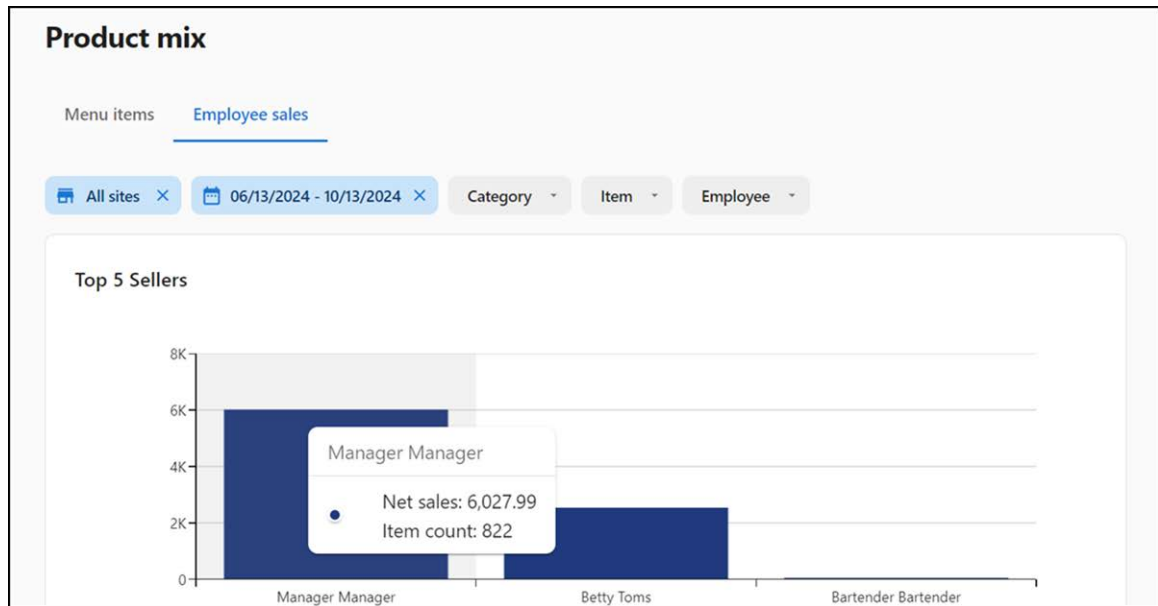
You can sort the items by clicking the pivot(>) next to each item of the first three columns. Clicking the pivot gives you detailed sales data of each item sold and also modifier data sold accordingly.

'Employee sales' view

To run the 'Employee sales' view:

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

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



'Product mix' report - '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.

The following information appears in the report:

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

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

'Product mix' report - 'Total sales summary' view

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.

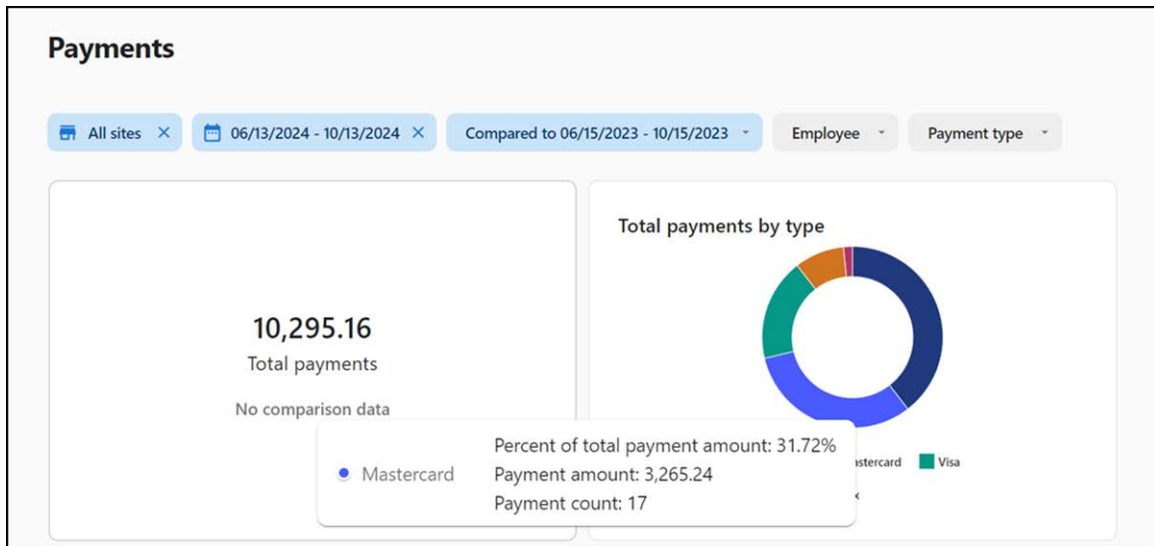
To refine your search:

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.

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Payments

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

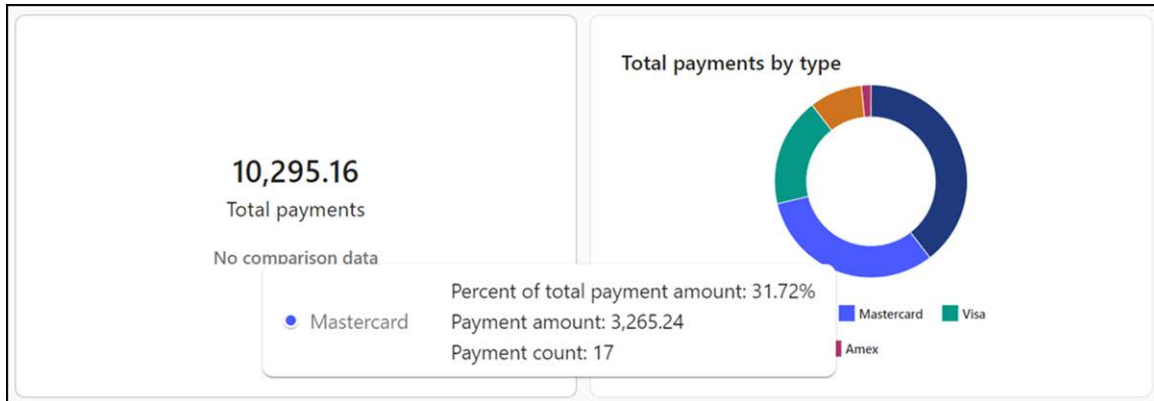


'Payments' report

To run the 'Payments' report:

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

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



'Payments' and 'Total payments by type'

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

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

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

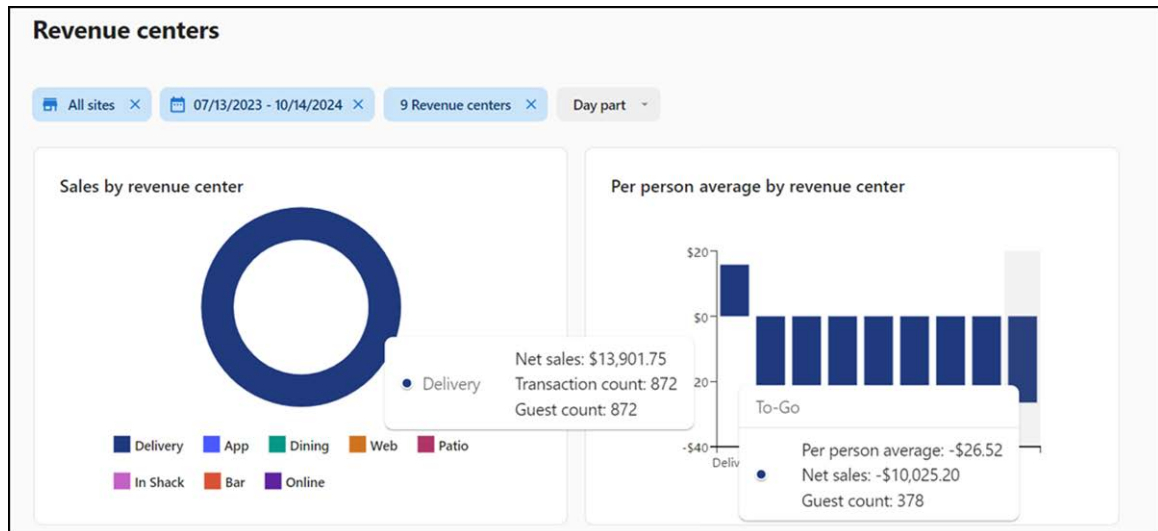
'Payments' summary

The following information appears in the report:

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

Revenue centers

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



'Revenue centers' report

To run the 'Revenue centers' report:

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

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

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

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



Note

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

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

'Revenue centers' report view

The following information appears in the report:

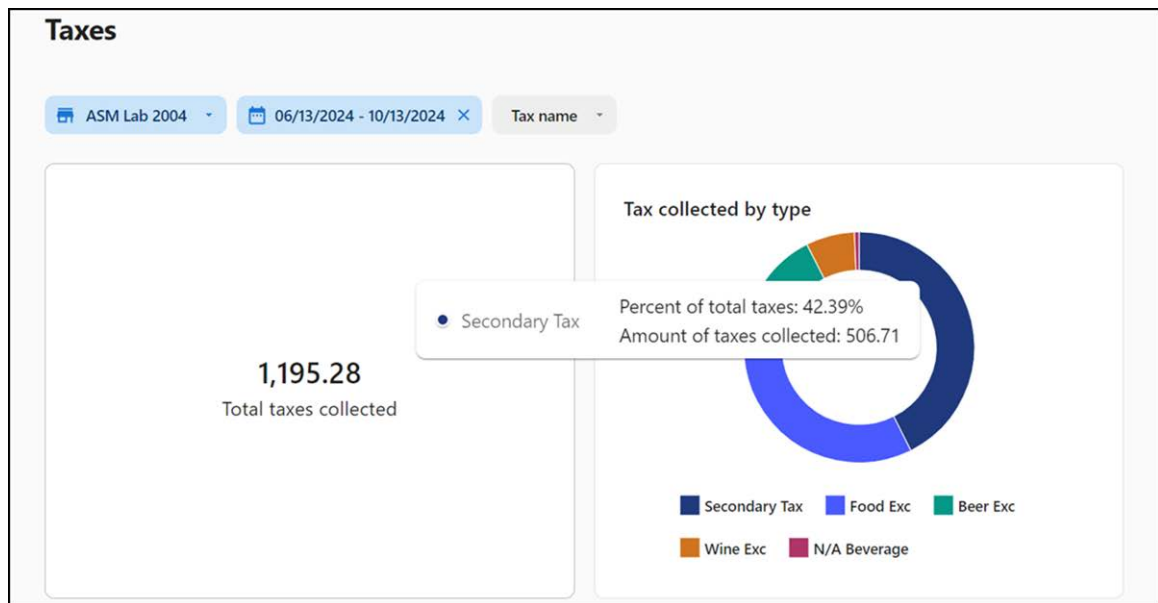
Column	Description
Site	Name of the site or store.
Net Sales	The net sales after required exemption.
Tax amount	Total amount of taxes collected for a transaction.
Discount amount	Total amount of discounts, such as vouchers, coupons, and more.
Other charges amount	Total amount of surcharges applied to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

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

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Taxes

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



'Taxes' report

To run the 'Taxes' report:

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

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

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

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

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

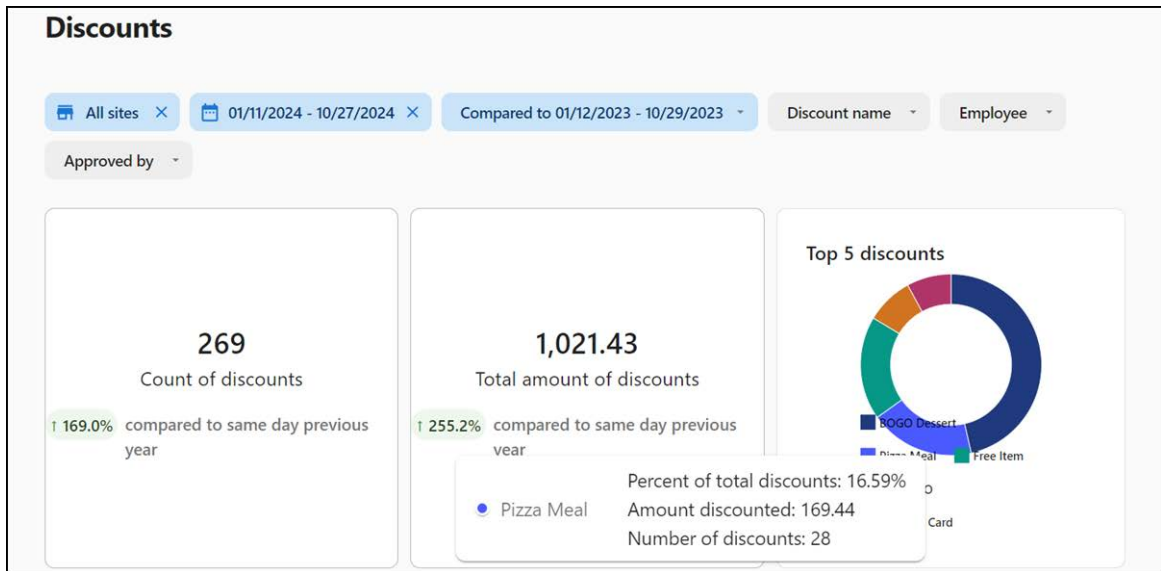
'Taxes' summary

The following information appears in the report:

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

Discounts

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



'Discounts' report

To run the 'Discounts' report:

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

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

Count of discounts — Displays the total number of discounts.

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

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

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

'Discounts' report

The following information appears in the report:

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

Refunds

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



'Refunds' report

To run the 'Refunds' report:

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

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

Refund count — Displays the total number of refunds issued.

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

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

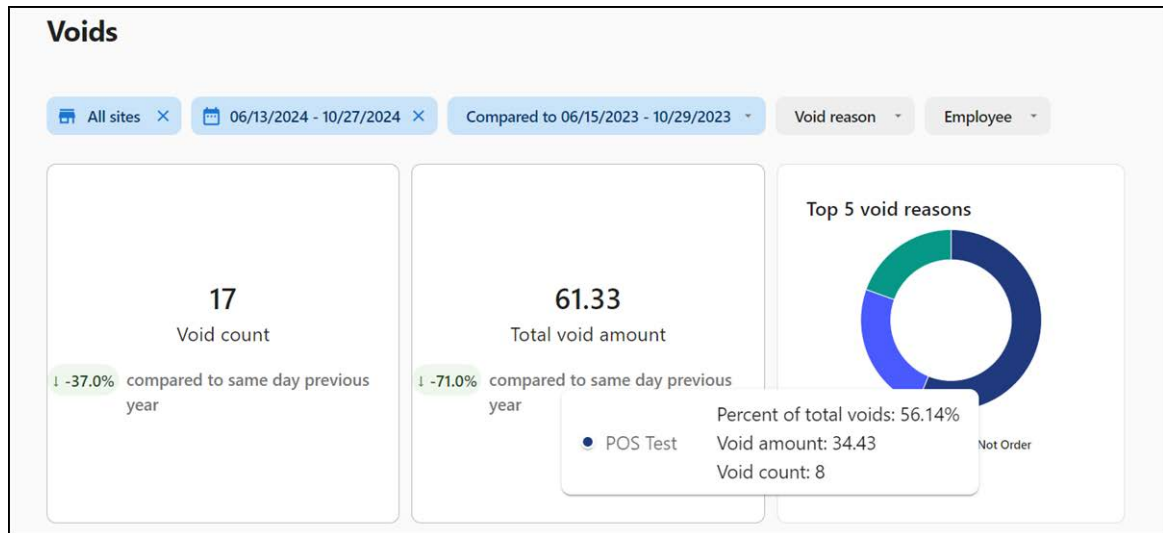
'Refunds' report

The following information appears in the report:

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

Voids

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



'Voids' report

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.

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

'Voids' report

The following information appears in the report:

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.

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Viewing transactions

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

Transactions

[View transactions](#) Export view

All sites × 06/13/2024 - 10/27/2024 × Transaction type ▾

Columns Filters Density Search...

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

'Transaction' report

The 'Transactions' report offers two views:

View transactions — Provides a condensed view of transaction details, with the ability to open a customer receipt style view of the transaction. This is helpful when researching a transaction and reprinting a transaction.

Export view — Provides a tabular view of the full set of key transaction metrics. This view is helpful when you need to work with exported data externally, or when importing into third-party systems.

Running the 'View transactions' view

To run the Transactions > 'View transactions' view:

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

-OR-

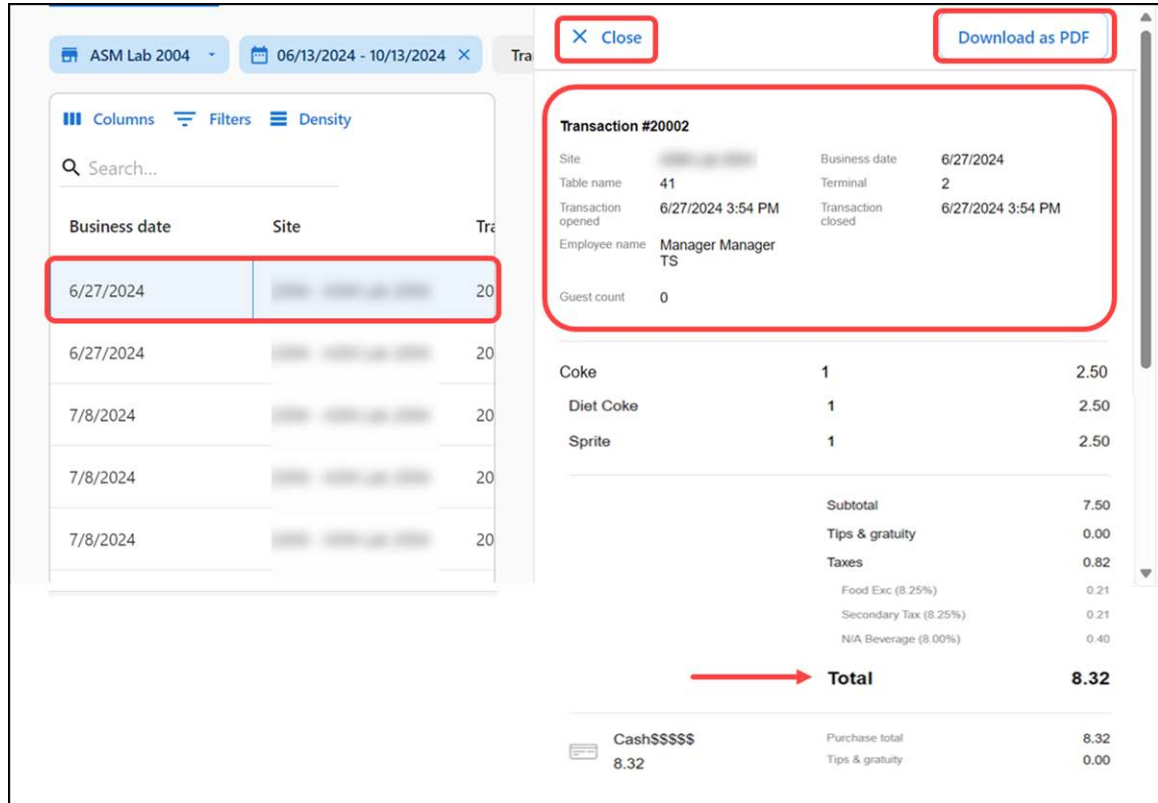
Click **Select all Sites** to view report for all sites.

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

The following information appears in the report:

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

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



Transaction details

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

To run the Transactions > 'Export view' report:

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

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

The screenshot shows the 'Transactions' page in 'Export view'. At the top, there are tabs for 'View transactions' and 'Export view'. Below the tabs, there are filters for 'All sites' and a date range '06/13/2024 - 10/27/2024'. The table below has columns for Business date, Site, Employee, Transaction #, Transaction open time, and Transaction closed time. The data rows show transactions from 10/10/2024 to 10/14/2024 at the '2004 - ASM Lab ...' site, involving employees like 'Betty Toms' and 'Manager Manag...'. A large 'DRAFT' watermark is visible across the page.

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

'Export' view

The following information appears in the report:

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

POS event log

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

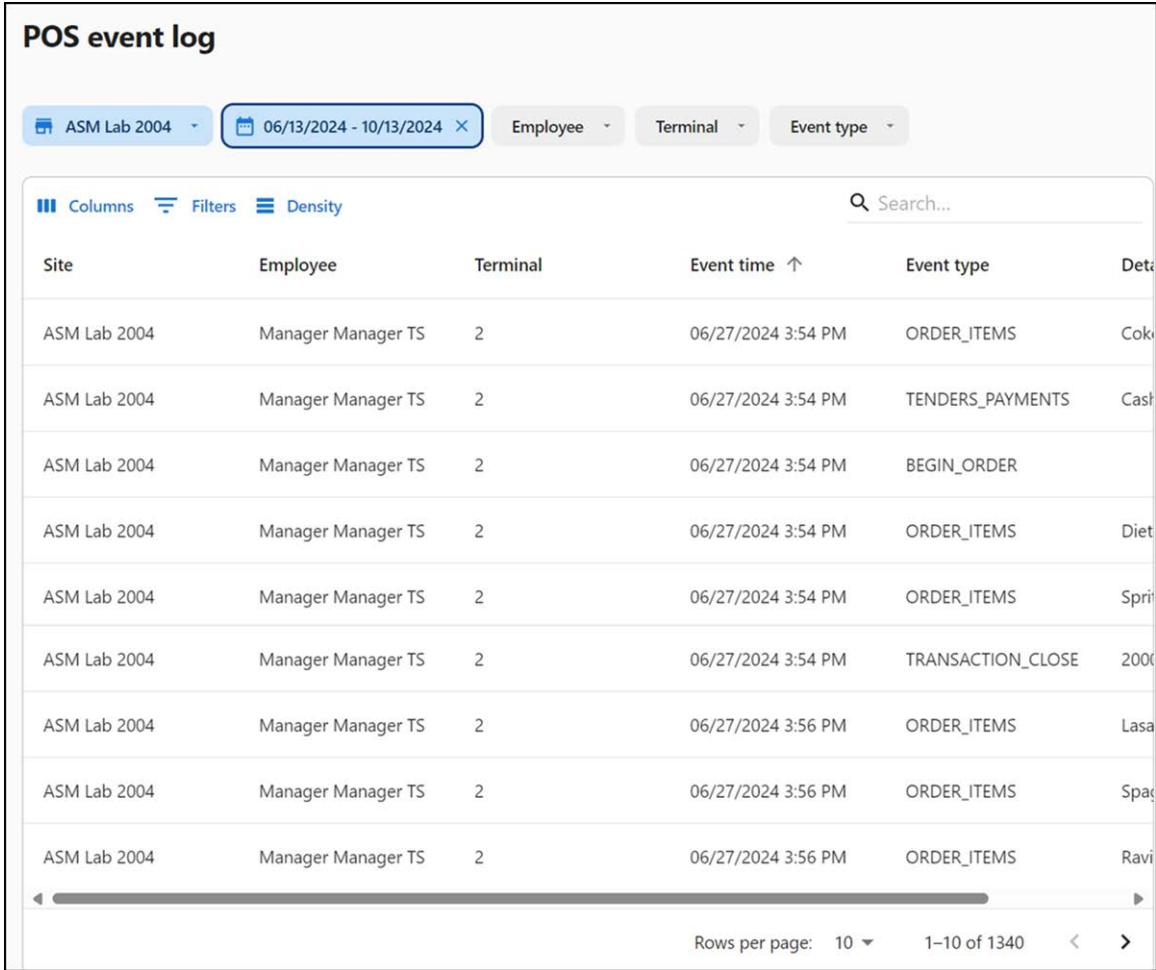


Warning

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

To run the 'POS event log' report:

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



'POS event log' screen

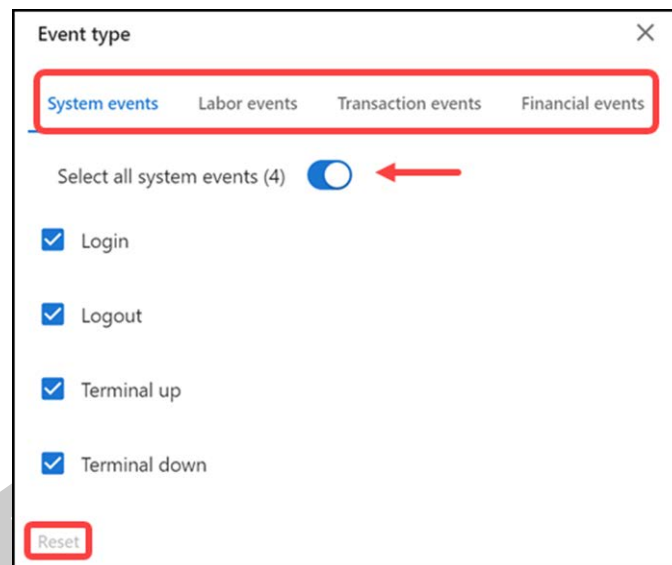
2. Select a **site** to report from the drop-down list.

-OR-

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

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

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



'POS event log' - Event type selection

System Events — To view the transactions specific to the system events such as login, logout, terminal up and terminal down.

Labor events — To view the transactions specific to the labor events such as clock in, clock out, edit shift, and more.

Transaction events — To view the transactions specific to the transaction events such as open transaction, closed transaction, order items, re-open transaction, refund, split transaction and more.

Financial events — To view the transactions specific to the financial events such as paid in, paid out, checkout, safe drop and delete checkout.

The following information appears in the report:

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

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Managing Company links

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

Edit company links

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

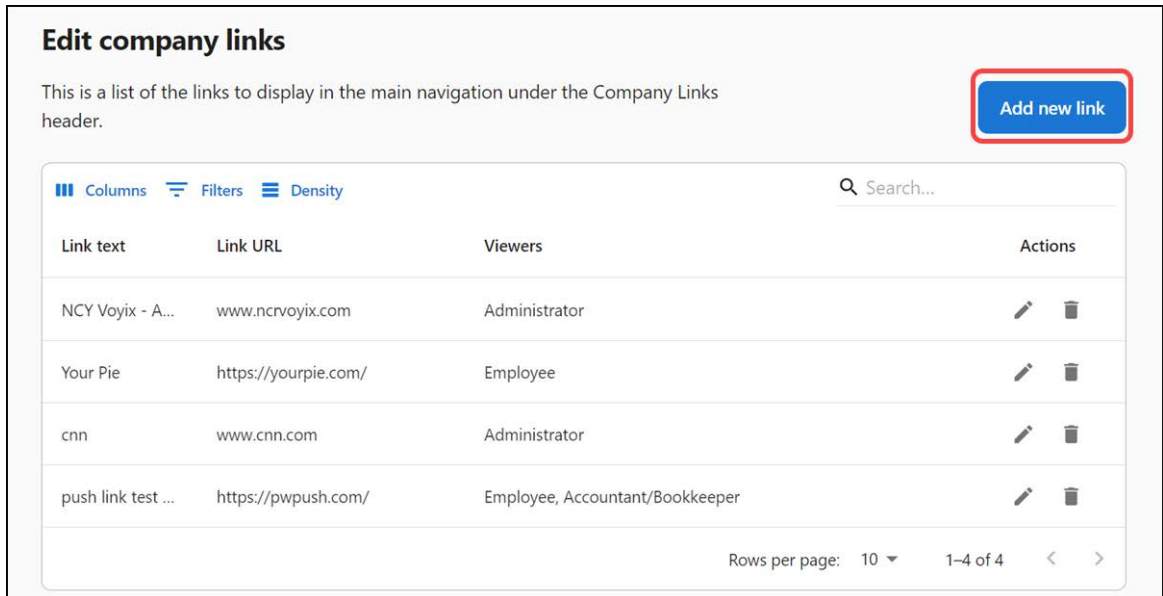
Link text	Link URL	Viewers	Actions
NCY Voyix - A...	www.ncrvoyix.com	Administrator	
Your Pie	https://yourpie.com/	Employee	
cnn	www.cnn.com	Administrator	
push link test ...	https://pwpush.com/	Employee, Accountant/Bookkeeper	

Columns Filters Density Search...
Rows per page: 10 1-4 of 4 < >

'Edit company links' screen

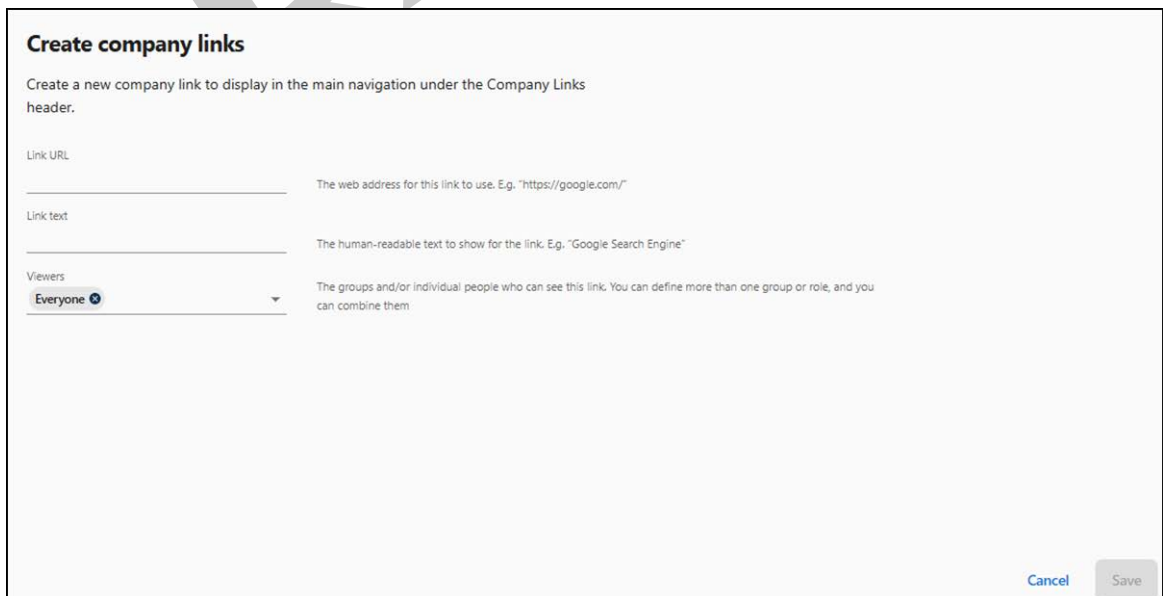
To create a company link:

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



'Edit company links' screen

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



'Create company links' screen

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

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

Edit company links

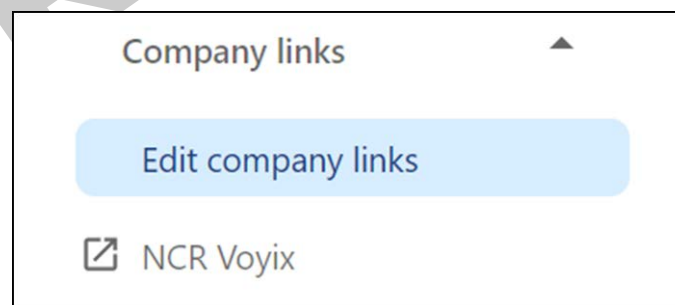
This is a list of the links to display in the main navigation under the Company Links header. Add new link

Columns Filters Density Search...

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

List of company links

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



New company link

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

Viewing the Activity Log

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

To view the Activity Log:

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

Activity Log

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

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

Columns Filters Density Search...

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

Activity Log landing page

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

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

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

Origin — Module impacted due to the activity.

User — Employee who performed the activity.

Sites — Site at which the activity occurred.

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

Entity — Business entity impacted.

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

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

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

Priority — Severity of the corresponding activity.

Origin — Actual module that was impacted.

User — Name of the employee who performed the activity.

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

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

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

Message — Additional information about the activity.

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

Audit logging ID — Unique audit log ID.

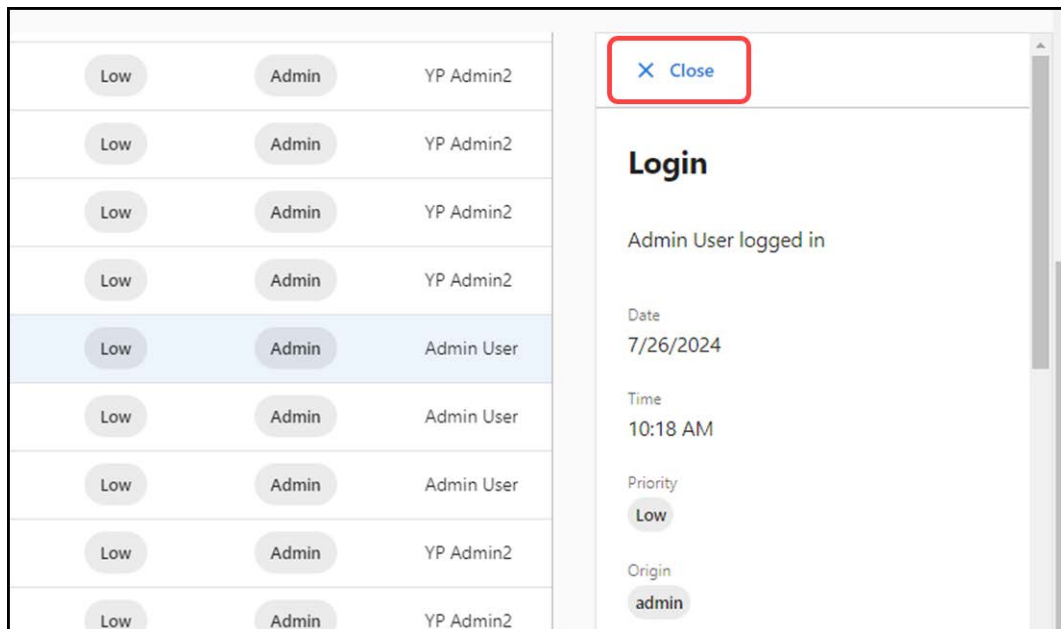
Pub Sub Message ID — Unique pub-sub message ID.

Payload — Actual payload message.

The screenshot displays the 'Activity Log' interface. On the left, there's a grid of log entries with columns for Date, Time, Priority, and Origin. The selected entry is from 10/12/2024 at 1:21 AM, with a Low priority and 'Inventory' origin. On the right, a side panel titled 'Update' provides more details for this event, including the message: 'Raw item Apples 4 with Category ID 5140 wa'. The side panel also shows the Date (10/12/2024), Time (1:21 AM), Priority (Low), and Origin (inventory).

Activity Log side panel

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



Activity Log side panel - Close button

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About Settings

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

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

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

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

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

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Working with 'Organization settings'

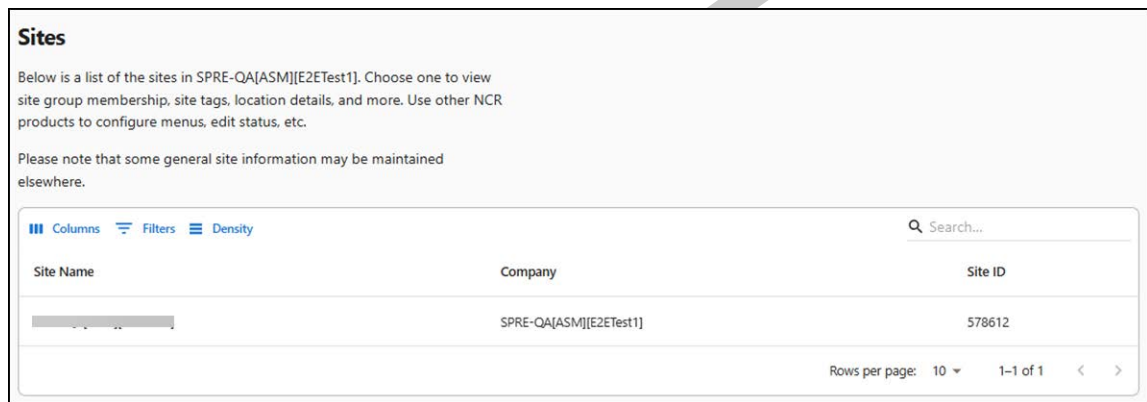
Use 'Organization settings' to view location details for sites to which you are assigned and to establish your fiscal calendar.

Viewing site information

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

To view the sites to which you have access:

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



Sites

Below is a list of the sites in SPRE-QA[ASM][E2ETest1]. Choose one to view site group membership, site tags, location details, and more. Use other NCR products to configure menus, edit status, etc.

Please note that some general site information may be maintained elsewhere.

Site Name	Company	Site ID
	SPRE-QA[ASM][E2ETest1]	578612

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

'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.

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

Configuring the fiscal calendar

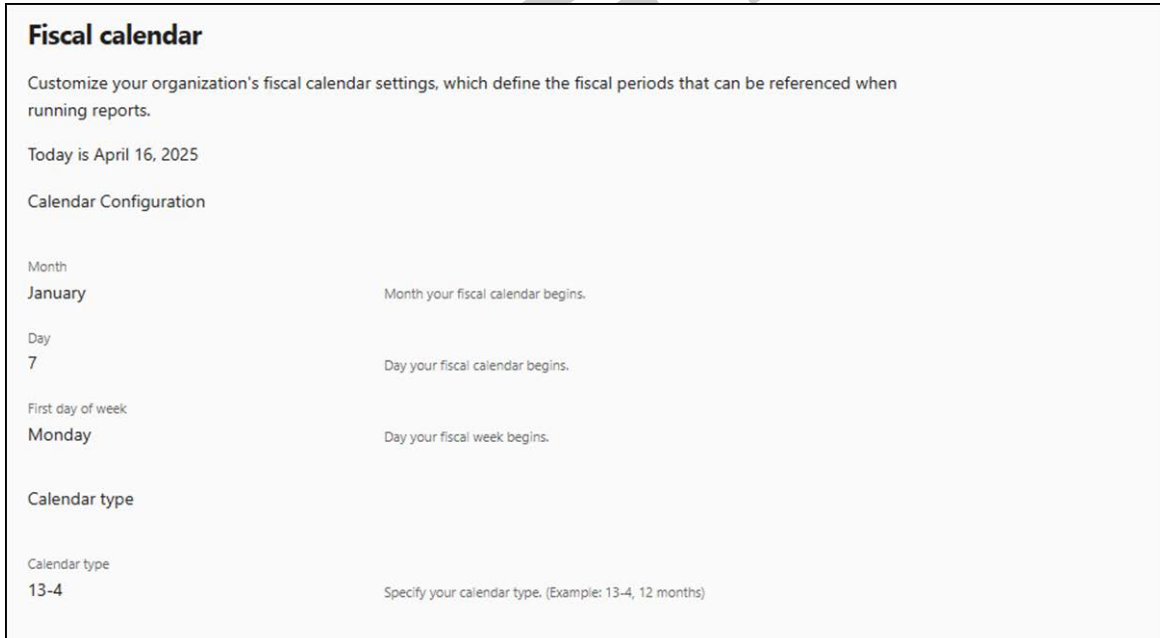
A fiscal calendar is a 12-month accounting period that an organization uses to manage their financial reporting and accounting activities. The calendar helps you track important financial events, such as the end of a quarter or end of fiscal year, and plan for financial reporting and tax obligations.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

Important

You must be an Admin to edit the settings available in the 'Fiscal calendar' function; otherwise, the information is read only.

To configure the fiscal calendar:

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



The screenshot shows the 'Fiscal calendar' configuration page. At the top, it says 'Fiscal calendar' and 'Customize your organization's fiscal calendar settings, which define the fiscal periods that can be referenced when running reports.' Below that, it displays 'Today is April 16, 2025'. The main section is titled 'Calendar Configuration' and contains several settings:

Month	January	Month your fiscal calendar begins.
Day	7	Day your fiscal calendar begins.
First day of week	Monday	Day your fiscal week begins.
Calendar type	13-4	Specify your calendar type. (Example: 13-4, 12 months)

Fiscal calendar configuration

2. Under the 'Calendar Configuration' group bar, the following details of your fiscal calendar appear.

Month — Month your fiscal calendar begins.

Day — Day your fiscal calendar begins.

First day of the week — Day your fiscal week begins

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

3. Select the day of the week on which the fiscal week begins.
4. 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.

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

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

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

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

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

Calendar type

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

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

Preview

< 2024 > (52 Weeks)

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

Discard changes Save

Fiscal calendar type

6. Click **Save**.

Working with 'Site settings'

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

Viewing Site Settings

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

SPRE QA[ASM][E2ETest1]
Last updated: 3/11/2025 12:23 PM

Site name
SPRE QA[ASM][E2ETest1] This is how your sites will be called throughout the system

Site ID
578612 The numeric value that the system uses to uniquely identify your site

Address
Alexander Road, Alpharetta, GA, 32606

Company Name
28544774450447ab9975ce19587fd87e

Primary Contact
Sankeerth Manda Who to contact in case of an emergency

Contact Email
-

Status
Active

Payroll Calendar
Every other week

Time Zone
America/New_York

'Site Settings' screen

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

Field name	Description
Site name	Unique name of the site. This name is used to represent your site at all occurrences.
Site ID	Unique ID of the site. This ID is used to represent your site at all occurrences.
Address	Full address of the selected site.
Company Name	Name of the company with which the selected site is associated.
Primary Contact	Name of the person for primary point of contact associated with the site.
Contact Email	Contact email of the primary person.
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

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.

Important

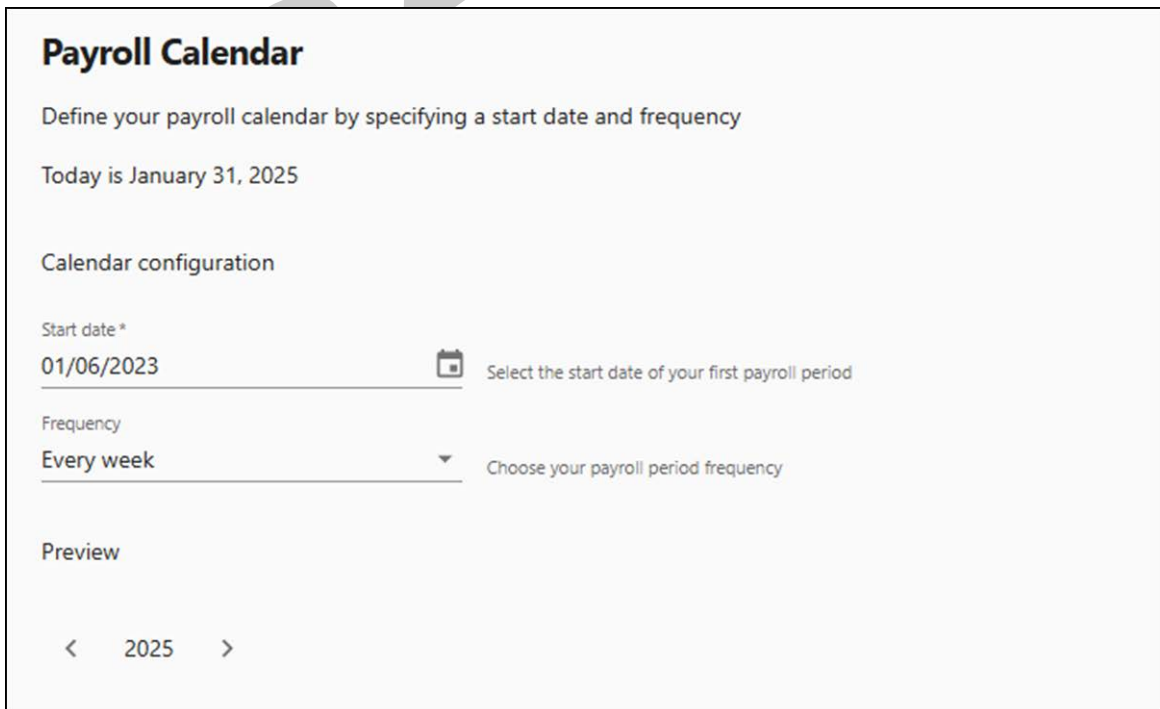
You must be an Admin to edit the settings available in the 'Payroll calendar' function; otherwise, the information is read only.

To configure the payroll calendar:

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

Every other week — Used for bi-weekly payrolls.

Every week — Used for weekly payrolls.





Payroll Calendar

Define your payroll calendar by specifying a start date and frequency

Today is January 31, 2025

Calendar configuration

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

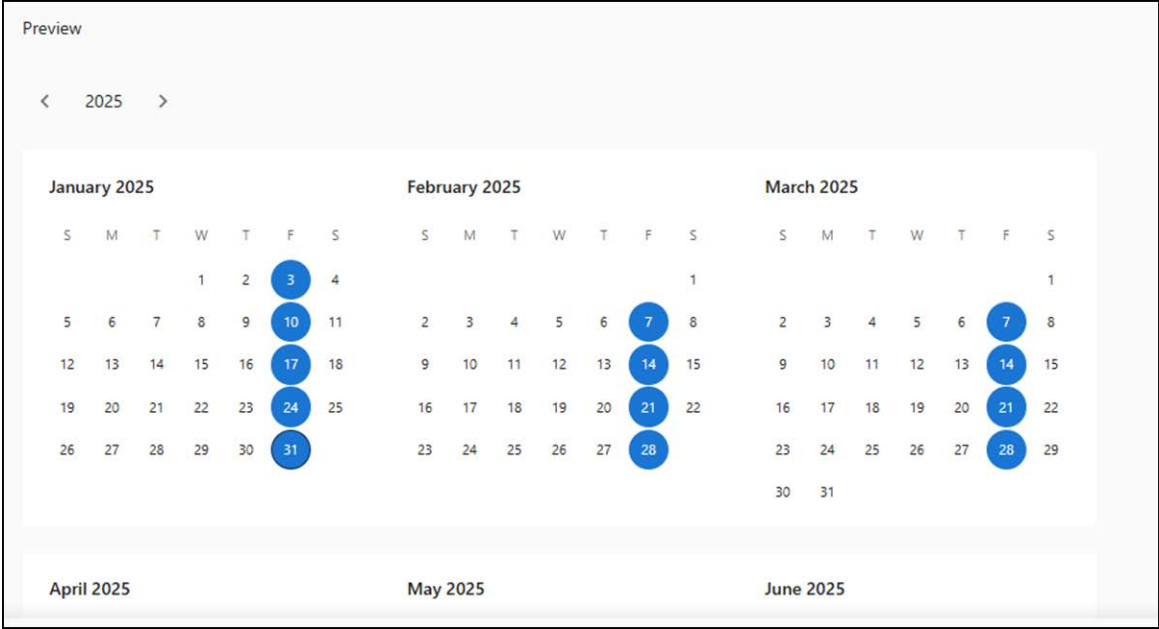
Frequency
Every week  Choose your payroll period frequency

Preview

< 2025 >

Payroll Calendar options

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



Payroll Calendar preview

4. Click **Save**.

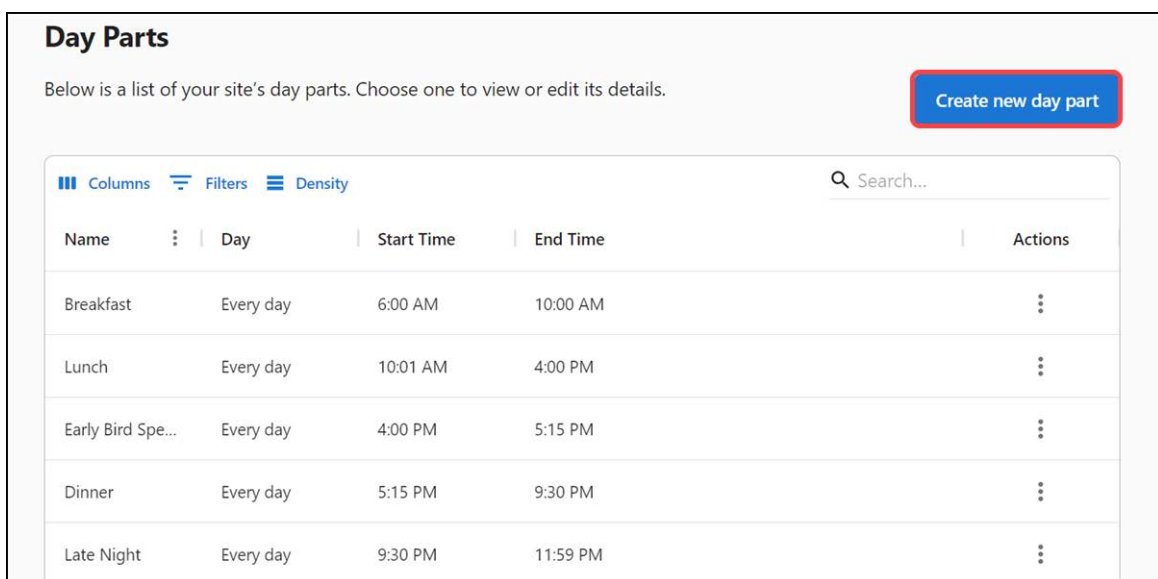
DRAFT

Configuring a day part

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

To configure a day part:

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



Creating a day part

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

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

The screenshot shows a mobile interface for creating a new day part. At the top, there are three buttons: 'Close' with an 'X' icon, 'More' with a three-dot icon, and 'Edit' in a rounded rectangle. Below this is the title 'Creating New Day Part'. The form consists of several sections: 'Name' with the text 'Happy hours', 'Description' with the text 'Discounted price', 'Day' with a dropdown menu showing 'Wednesdays', 'Start time' with '01:00 PM', and 'End time' with '04:00 PM'. At the bottom of the form are two buttons: 'Cancel' and 'Save'.

Day part

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

To edit a day part:

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

To delete a day part:

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

Working with Labor settings

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

Configuring Jobs

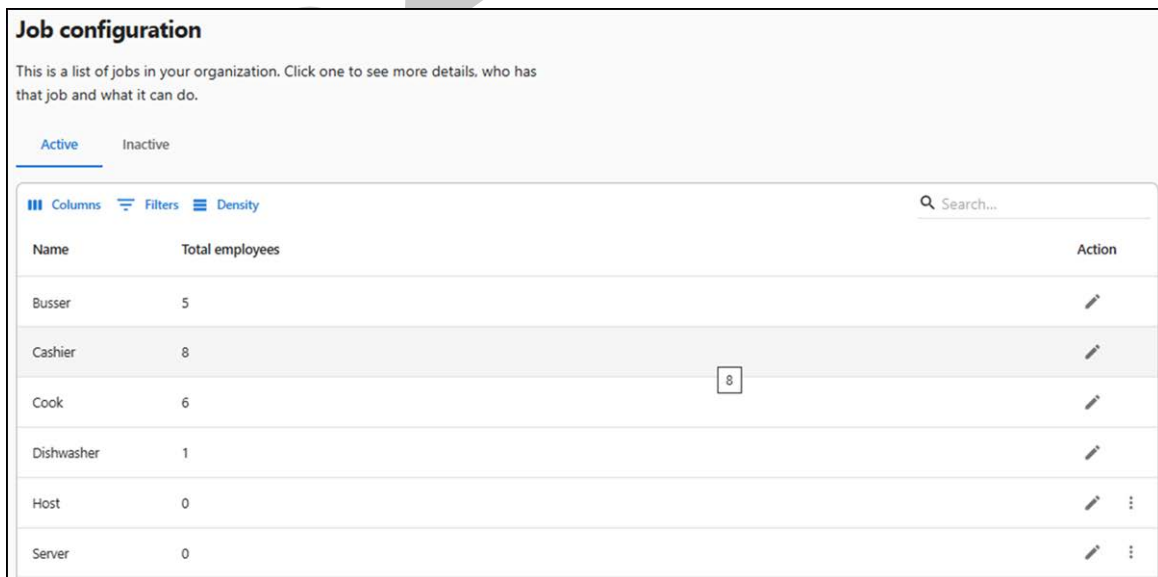
The 'Jobs' function provides a job description for the role an employee performs when they are clocked in. Jobs control whether an employee can enter orders, the parameters under which they can take breaks, whether they can operate a cash drawer, and more.

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

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

To modify job properties:

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



Job configuration

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

Active Inactive

Columns Filters Density Search...

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

'Job configuration' screen

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

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

- Identification**
 - A toggle switch for 'Show job on the POS system' is currently turned on.
 - A text field for 'Name*' contains the value 'Busser'. A tooltip indicates 'The job used on the POS system.'
 - Two checked checkboxes: 'Exclude hours and dollars from payroll' and 'Exclude hours and dollars from schedule metrics'.
 - A dropdown menu for 'Labor group' is set to 'Back of House'.
 - An empty 'GL code' field with a 'Read only' label. A tooltip provides information: 'For more information about GL codes, refer to the Uniform System of Accounts for Restaurants.'

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

'Job details' screen

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

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

Busser JOB CONFIGURATION / BUSSER

Job details

Employees

This is a list of employees configured to this job.

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

Columns Filters Density Search...

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

Employee jobs



Tip

When you select an employee in the list, ASM navigates you to the Employees function, allowing you to assign additional jobs to the employee. Refer to ["Step 3: Assigning a job to a new employee" on page 28](#) for more information.

Making a job inactive

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

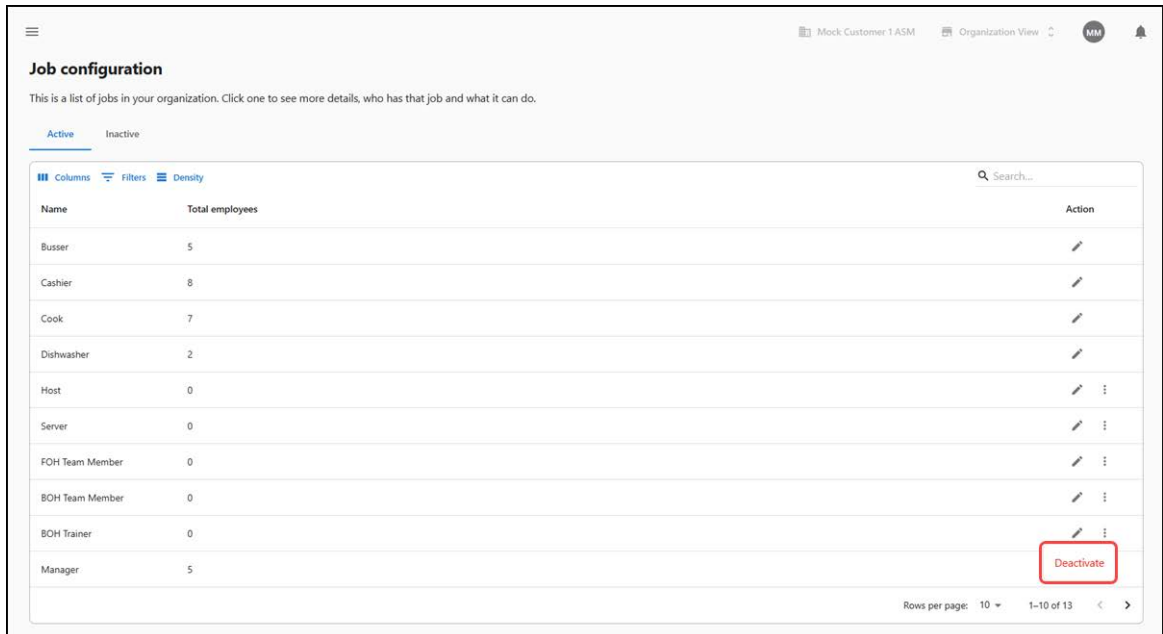


Warning

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

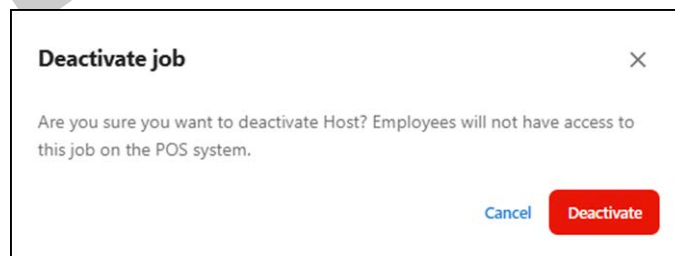
To deactivate a job:

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



Deactivate a job

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



Confirm job deactivation

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

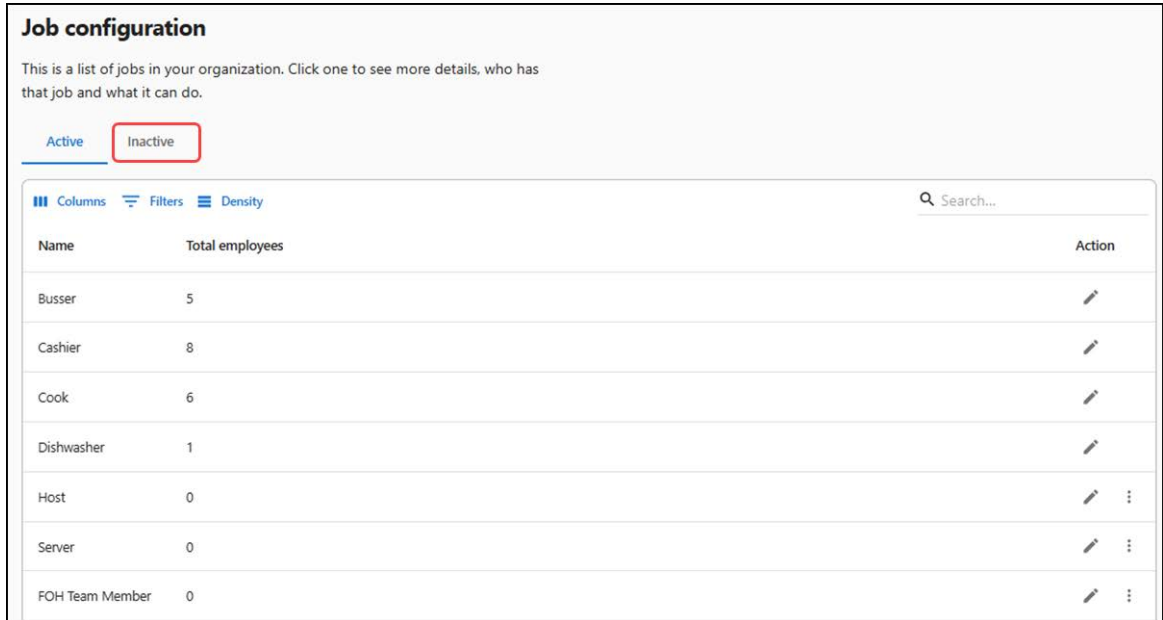


Tip

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

To activate a job currently set as inactive:

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



Inactive job

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



Activate a job

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

Appendix A: Bulk importing vendors and vendor items

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

Uploading vendors in bulk

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

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

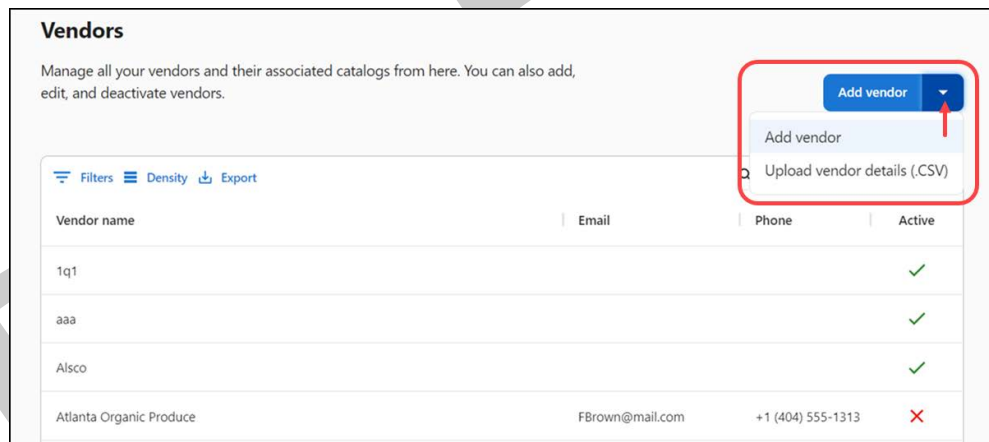
You will need the country.CSV, countrycode.CSV, and state.CSV as a reference for entering the data into vendors_data_import.CSV.

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

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

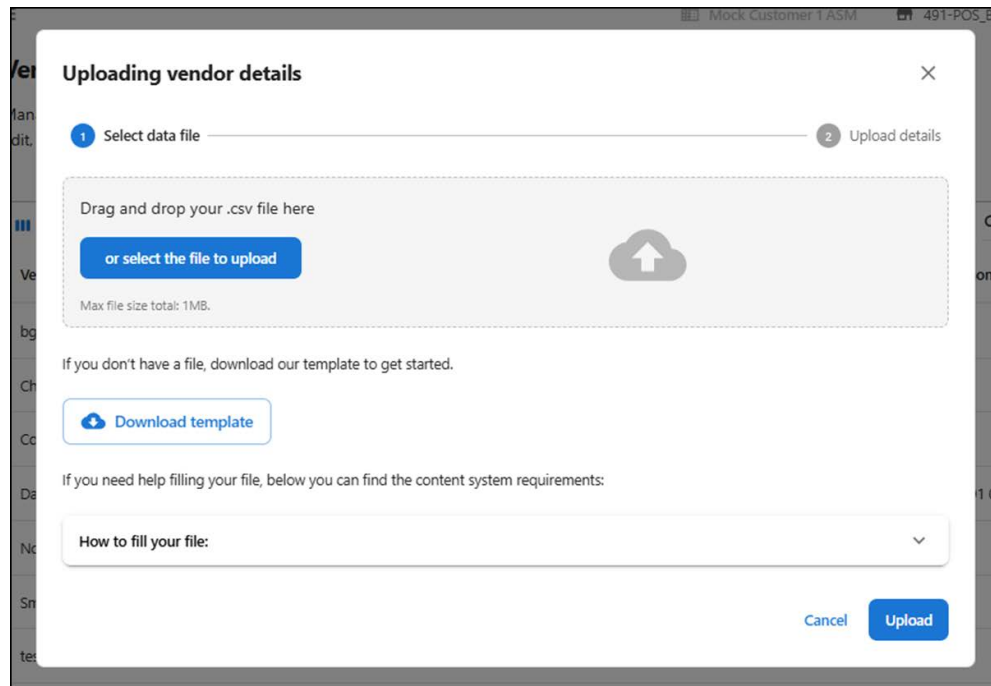
To upload vendors in bulk:

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



Add vendors in bulk

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



'Uploading vendor details' screen

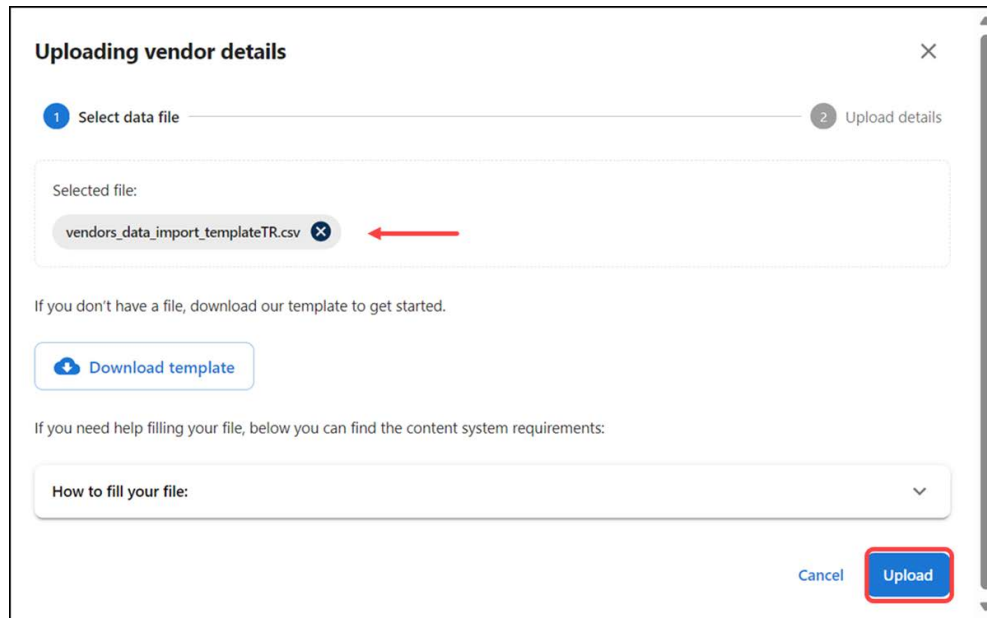
- Click **Download template**. The file automatically downloads vendor_data_import.CSV.
- Click the **How to fill your file** drop-down to expose instructions for completing the spreadsheet.
- Type or copy and paste the **vendor information** into vendor_data_import.CSV..

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

Adding vendor information in bulk

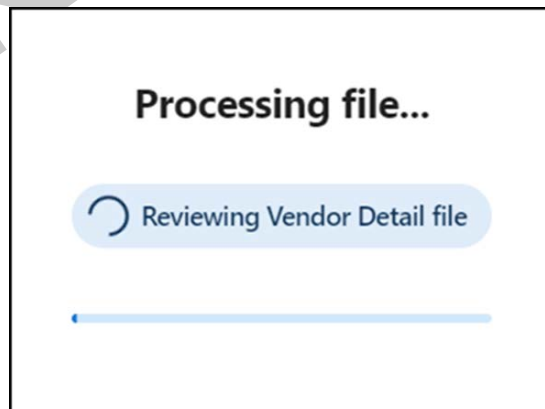
- Return to the **Uploading vendor details** screen and upload the **.CSV file** by performing **one** of the following:
 - Drag and drop **vendor_data_import.CSV** into the appropriate area.
 - OR-

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



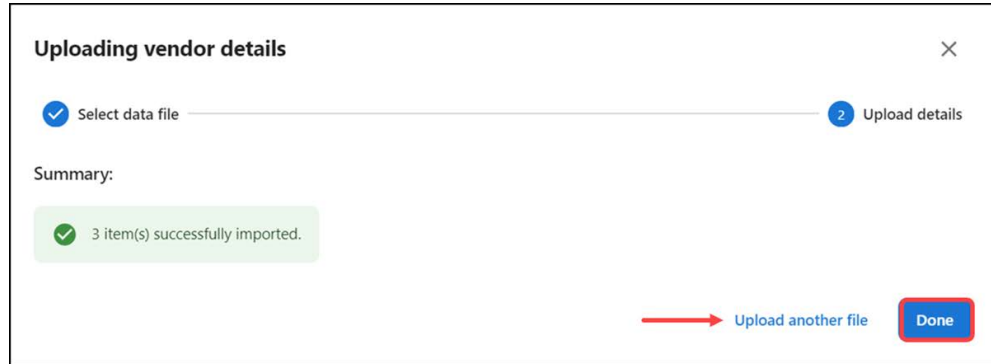
Selecting vendors file list

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



'Processing file' status screen

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



'Uploading vendor details' screen with summary

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

Uploading vendor items in bulk

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

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

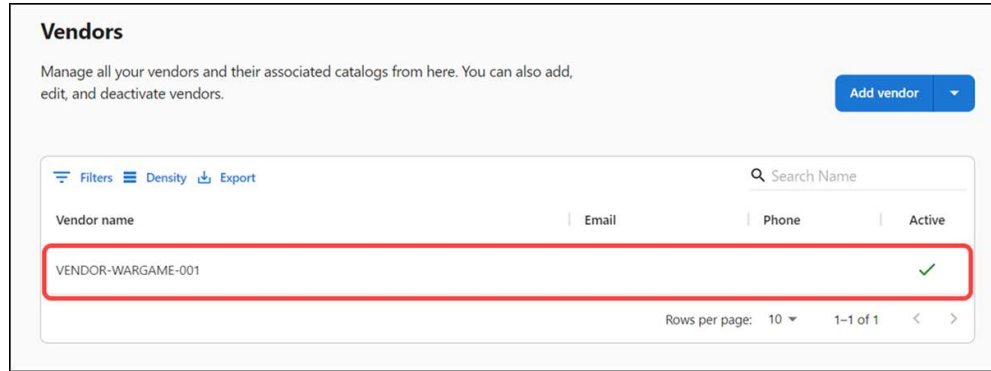
You will need the container.CSV, purchaseunit.CSV, and category.CSV as a reference for entering the data into vendors_item_import_template.CSV.

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

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

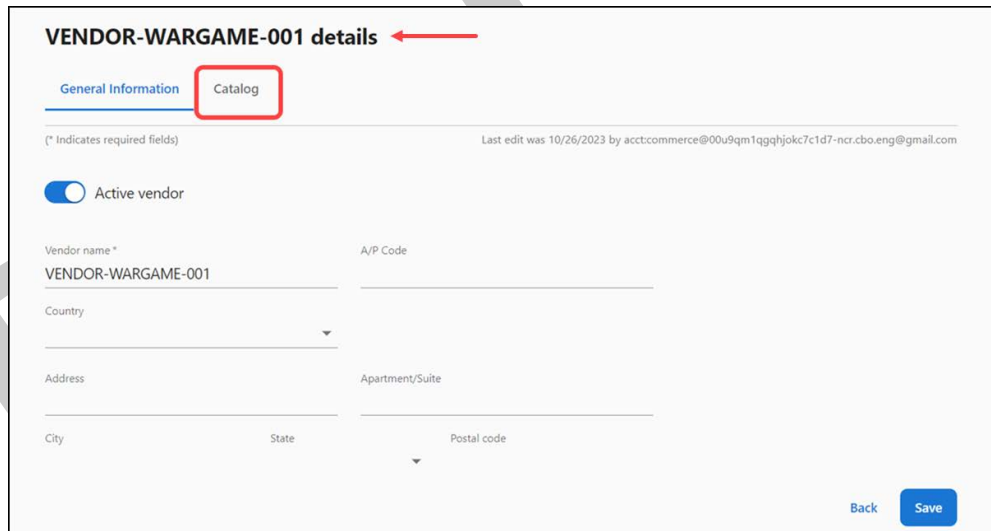
To upload vendor items in bulk:

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



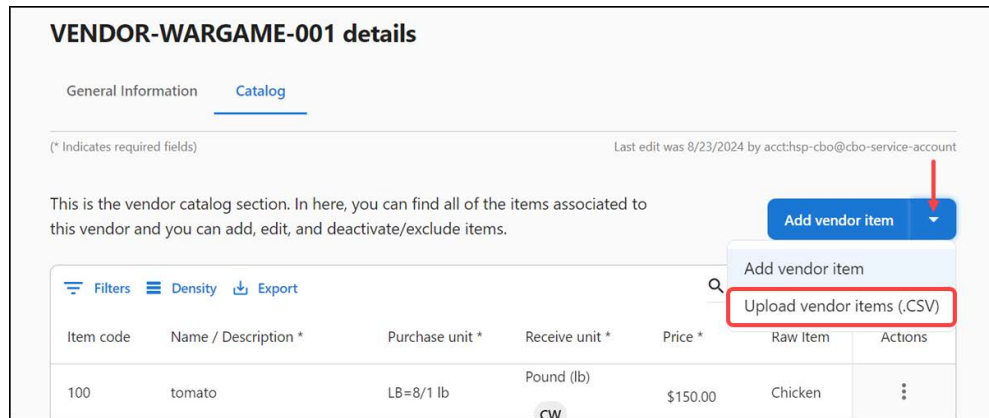
'Vendors' screen

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



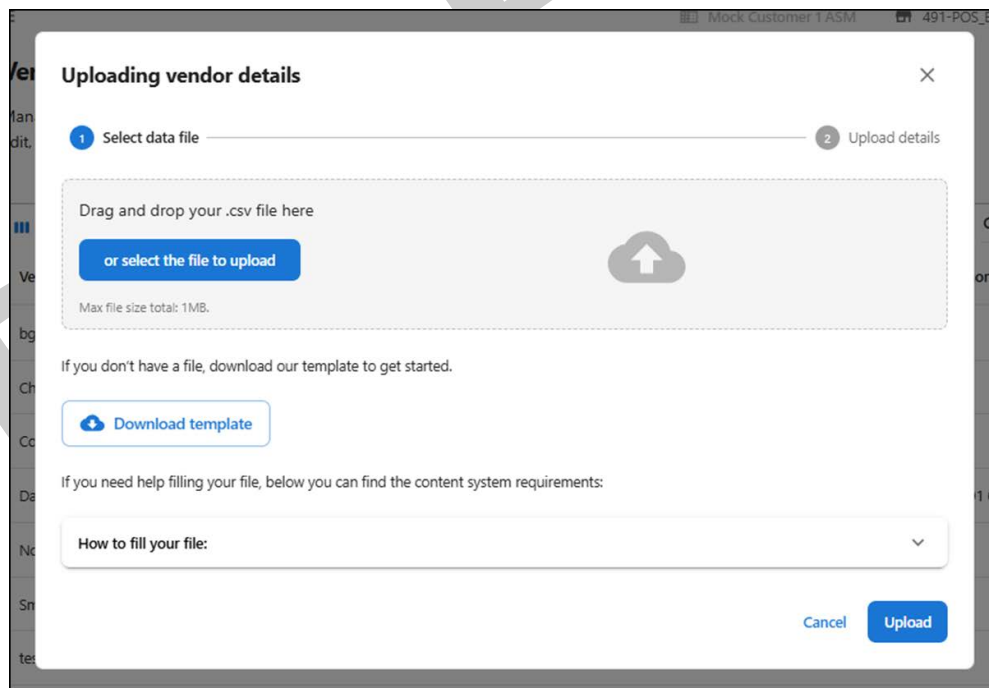
'General information' tab

3. Select the **Catalog** tab.



'Catalog' tab

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



'Uploading vendor details' screen when using .CSV file

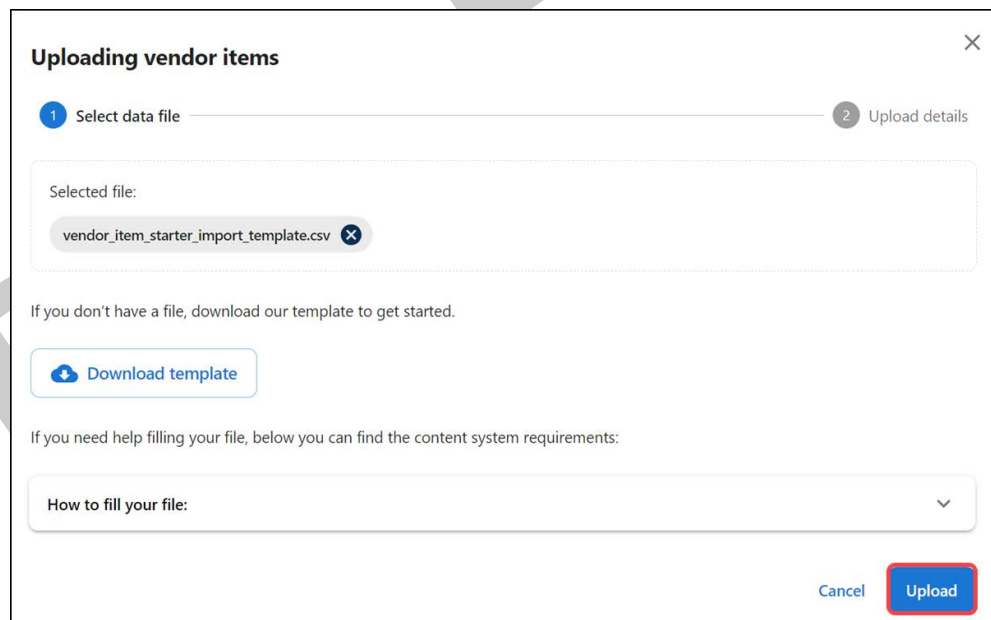
5. Click **Download template**. The file automatically downloads vendor_item_import_template.CSV.
6. Click the **How to fill your file** drop-down to expose instructions for completing the spreadsheet.

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

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

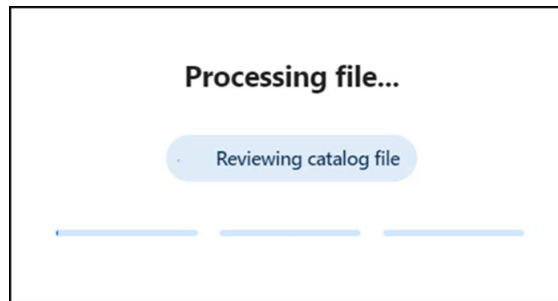
Bulk vendor items details in .CSV file

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



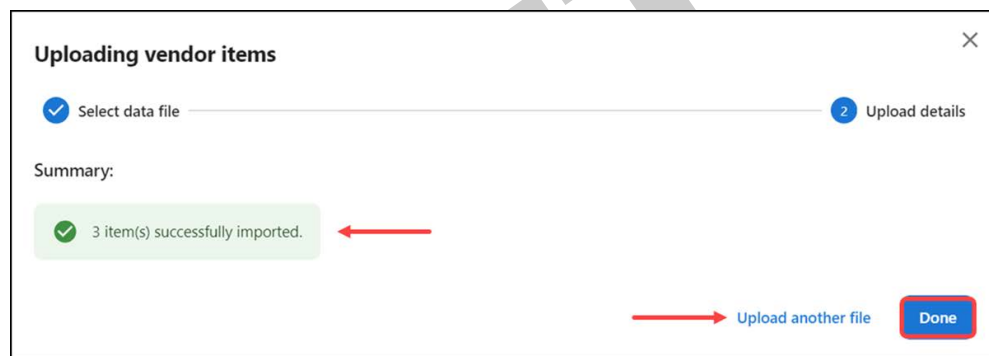
Selecting vendors items file list

The 'Processing file' status screen appears.



'Processing file' status screen

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



Bulk upload summary

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

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

Atlanta Organic Produce details

General Information Catalog

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

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

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

Filters Density Search Name

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

Vendor items successful upload

DRY

Appendix B: Uploading an invoice

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

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

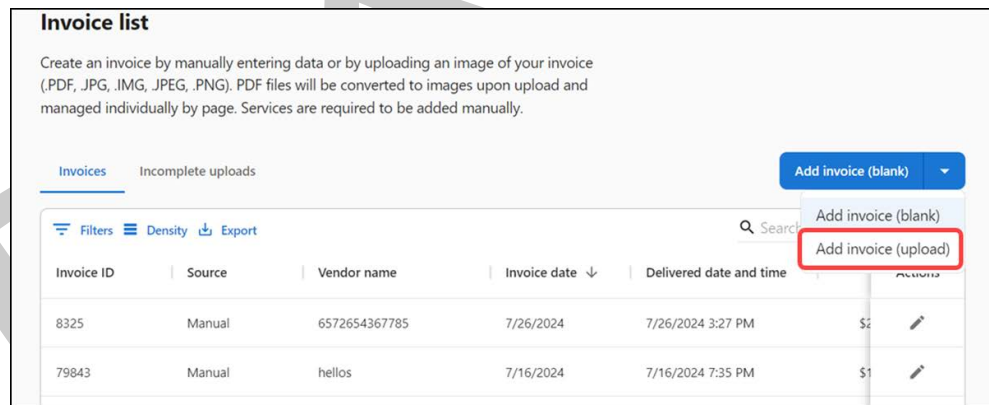
Tip

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

Uploading the invoice details

To upload the invoice details:

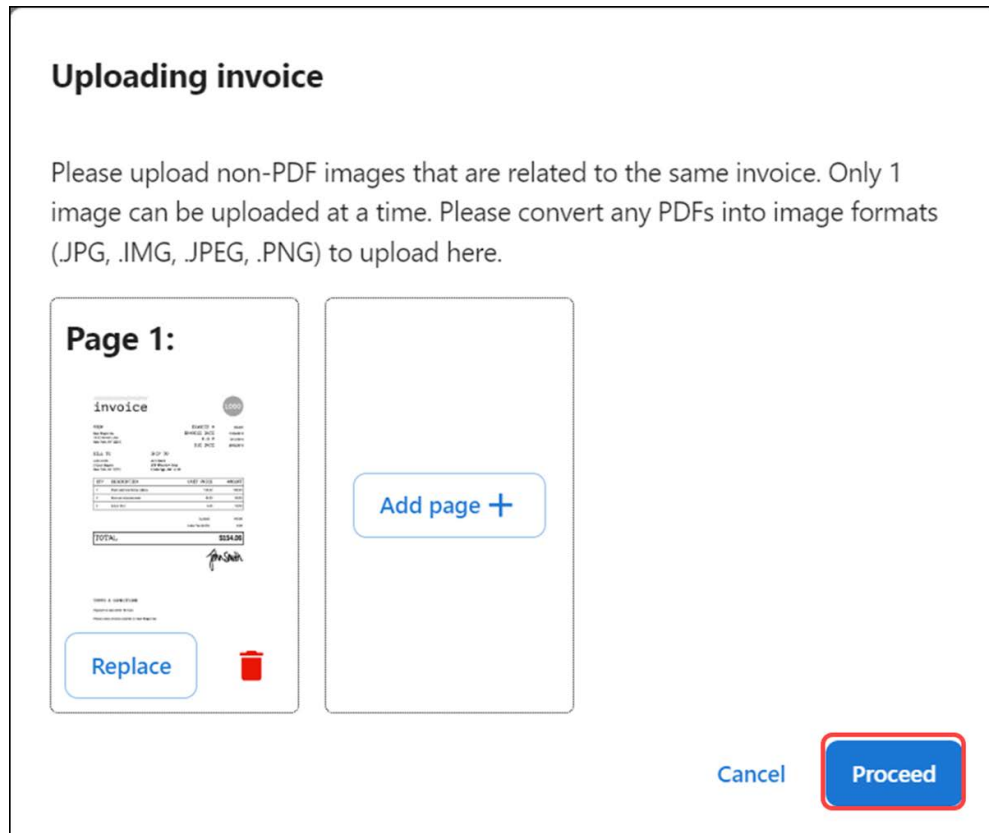
1. Select **Inventory > Invoices**. The 'Invoice list' screen appears.



'Invoice list' screen

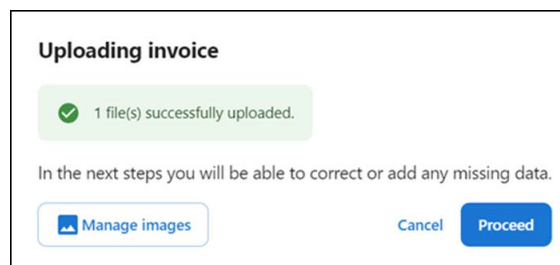
2. Select **Add invoice (upload)** from the 'Add invoice (blank)' drop-down list.

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



'Uploading invoice' screen

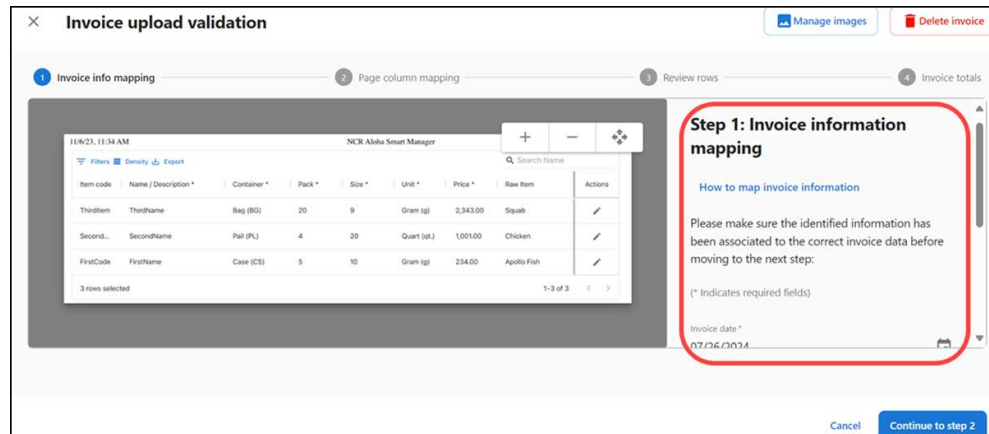
4. (Optional) Click **Add page +** to upload multiple images related to the same invoice.
5. Click **Proceed**. The 'Processing files' status screen appears. If your upload file meets the requirements, the 'Uploading invoice' success message appears.



'Uploading invoice' success message

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

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



'Invoice upload validation' screen

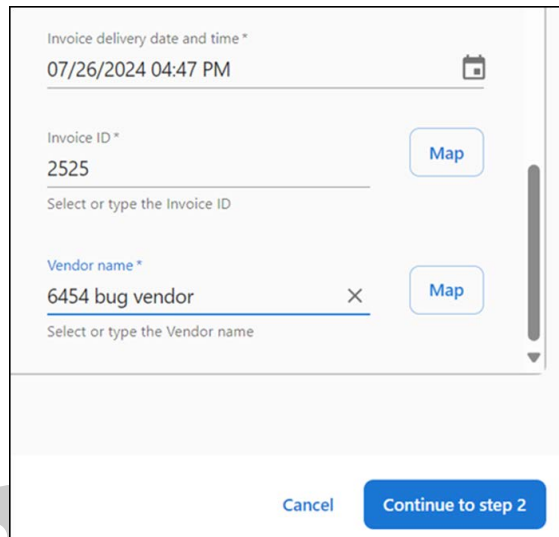
8. Continue to [Mapping invoice information](#) to begin the process of validating the uploaded invoice.

Mapping invoice information

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

Step 1: Invoice information mapping

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



The screenshot shows a form titled 'Invoice delivery date and time *' with a calendar icon. Below this, there are two input fields. The first is 'Invoice ID *' with the value '2525' and a 'Map' button to its right. Below the input is the text 'Select or type the Invoice ID'. The second is 'Vendor name *' with the value '6454 bug vendor' and a 'Map' button to its right. Below the input is the text 'Select or type the Vendor name'. At the bottom of the form are two buttons: 'Cancel' and 'Continue to step 2'.

Adding mapping details






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

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

Step 2: Page column mapping

[How to map invoice columns](#)

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

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

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

'Page column mapping' screen

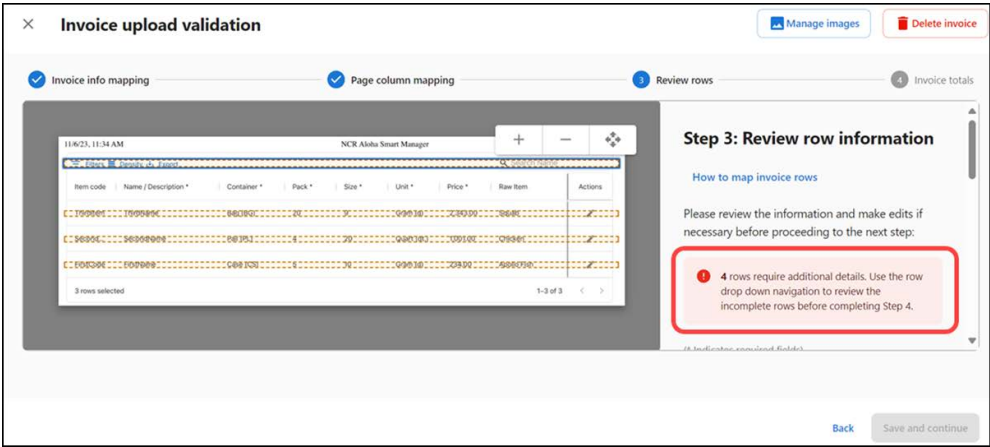
5. Continue to the **next procedure**.

Step 2: Page column mapping

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

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

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



'Review row information' screen

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

Step 3: Review row information

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

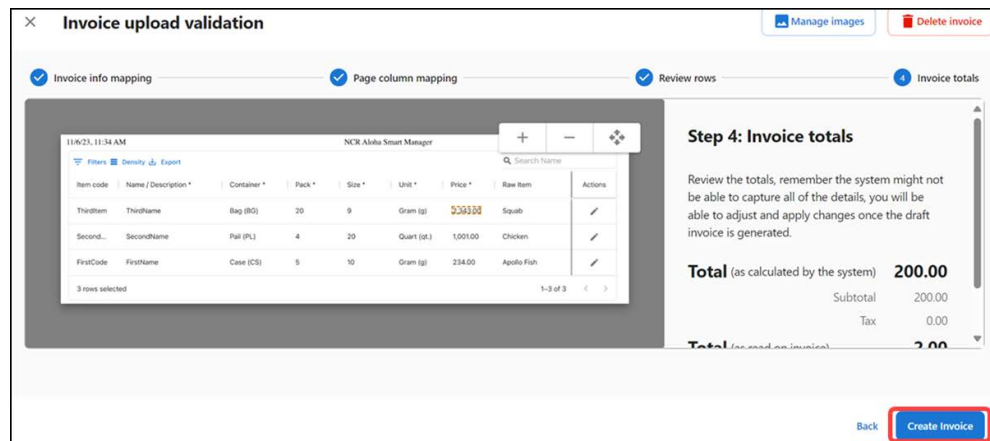
can **edit** all item details in your invoice. Based on the modifications, the system enables you to continue.



Note

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

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

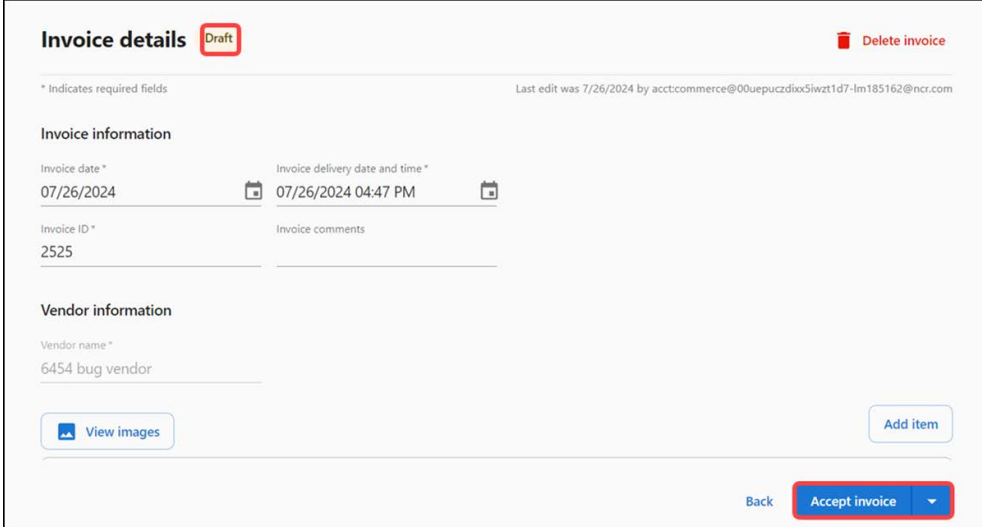


'Invoice upload validation' screen

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

Step 4: Invoice totals

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



The screenshot displays the 'Invoice details' screen with a 'Draft' status. At the top right, there is a 'Delete invoice' button. Below the header, a note indicates that asterisks denote required fields and provides the last edit timestamp and user. The 'Invoice information' section contains fields for 'Invoice date' (07/26/2024), 'Invoice delivery date and time' (07/26/2024 04:47 PM), 'Invoice ID' (2525), and 'Invoice comments'. The 'Vendor information' section includes a 'Vendor name' field with the value '6454 bug vendor'. At the bottom, there are 'View images' and 'Add item' buttons. A 'Back' button and a red-bordered 'Accept invoice' button are located at the bottom right.

'Invoice details' screen

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

Aloha Smart Manager, Starter User Guide

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:
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