

Aloha Smart Manager User Guide

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Getting Started with Aloha Smart Manager

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

Labor Management — Manage and configure employee records and jobs, create schedules, monitor and edit employee punches, 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.

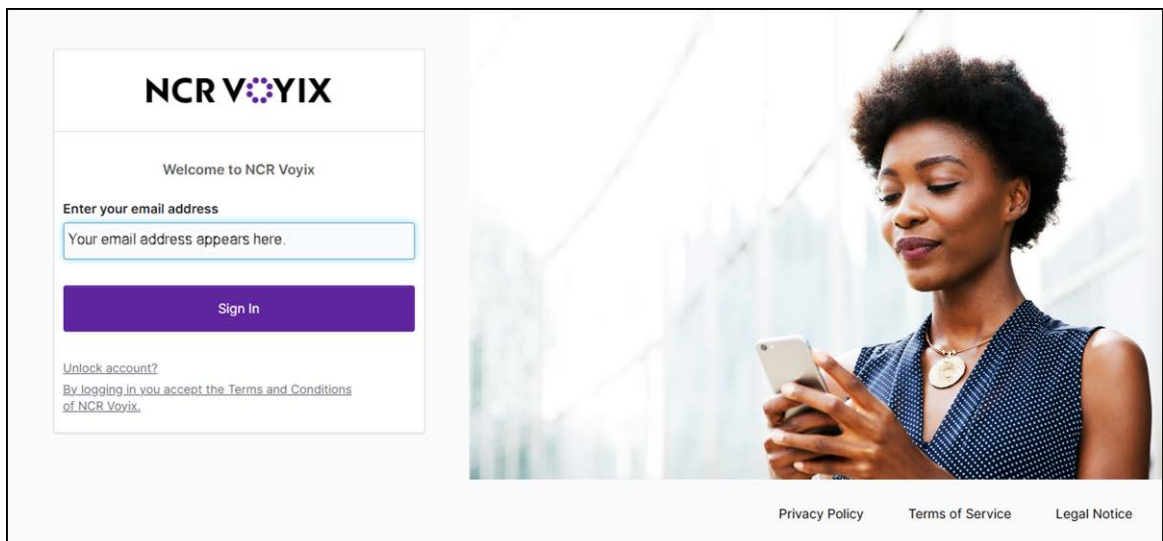
Sales Management — Track key restaurant sales metrics through a core set of reports, run a profit and loss statement for a view of restaurant profitability, view and reprint POS transactions, reconcile shift and daily cash transactions.

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.

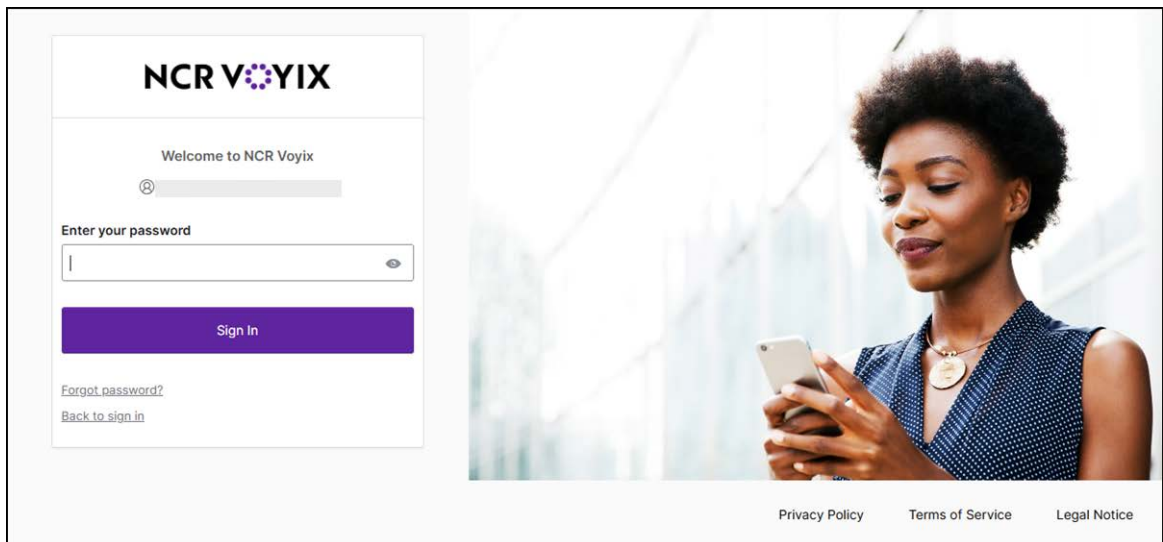
To sign in to ASM:

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



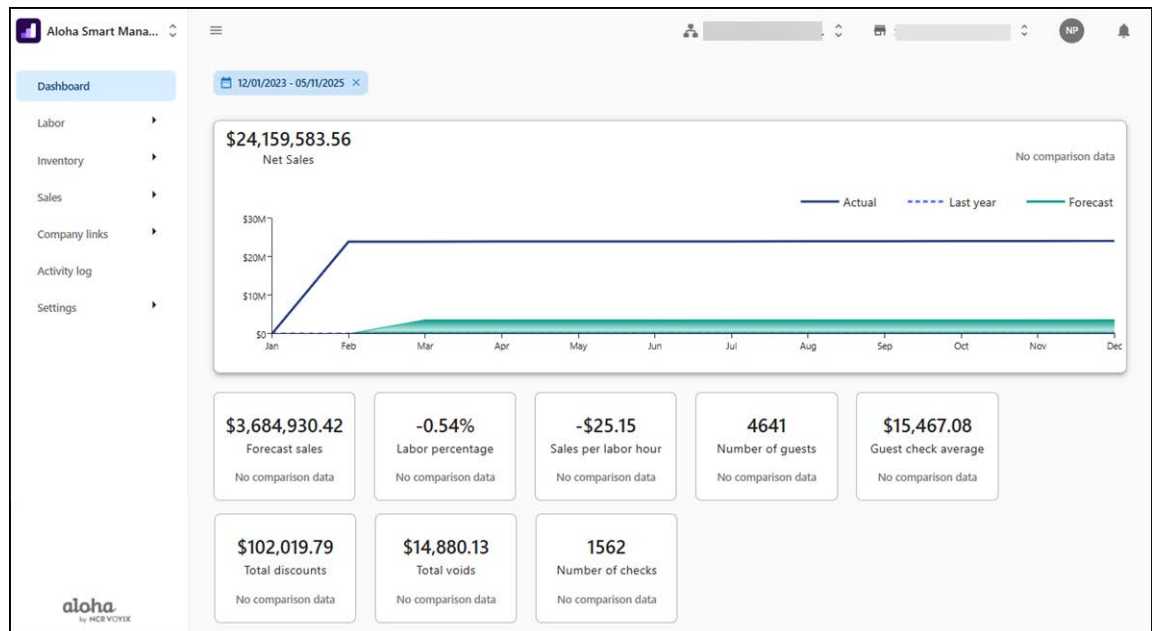
Welcome to NCR Voyix email address entry screen

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



Welcome to NCR Voyix password entry screen

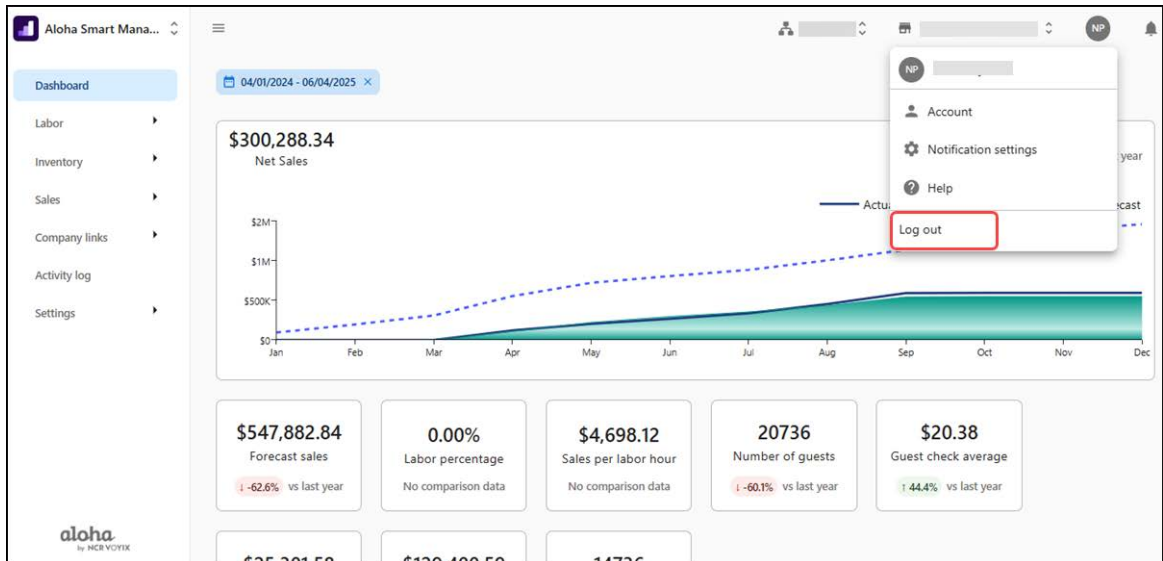
3. Type your **password** and click **Sign In**. Aloha Smart Manager opens to the landing page with the store mapped to your account appearing in the top right corner and the dashboard appearing on the screen, if available for your user profile.



ASM landing page

To log out of ASM:

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



Logging out of ASM

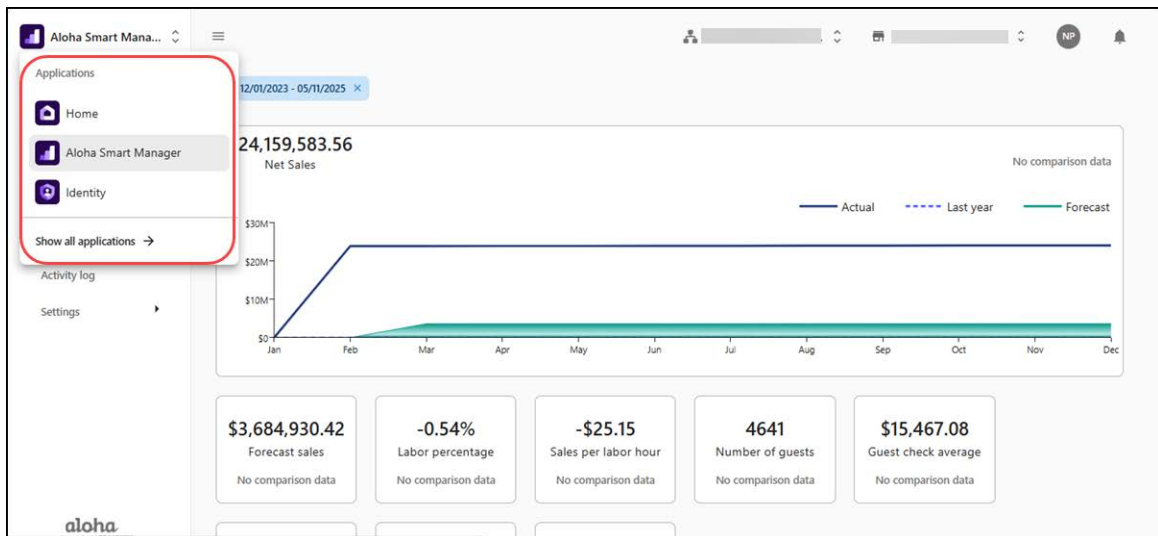
2. Click **Log out**.

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 switch between applications using app switcher:

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

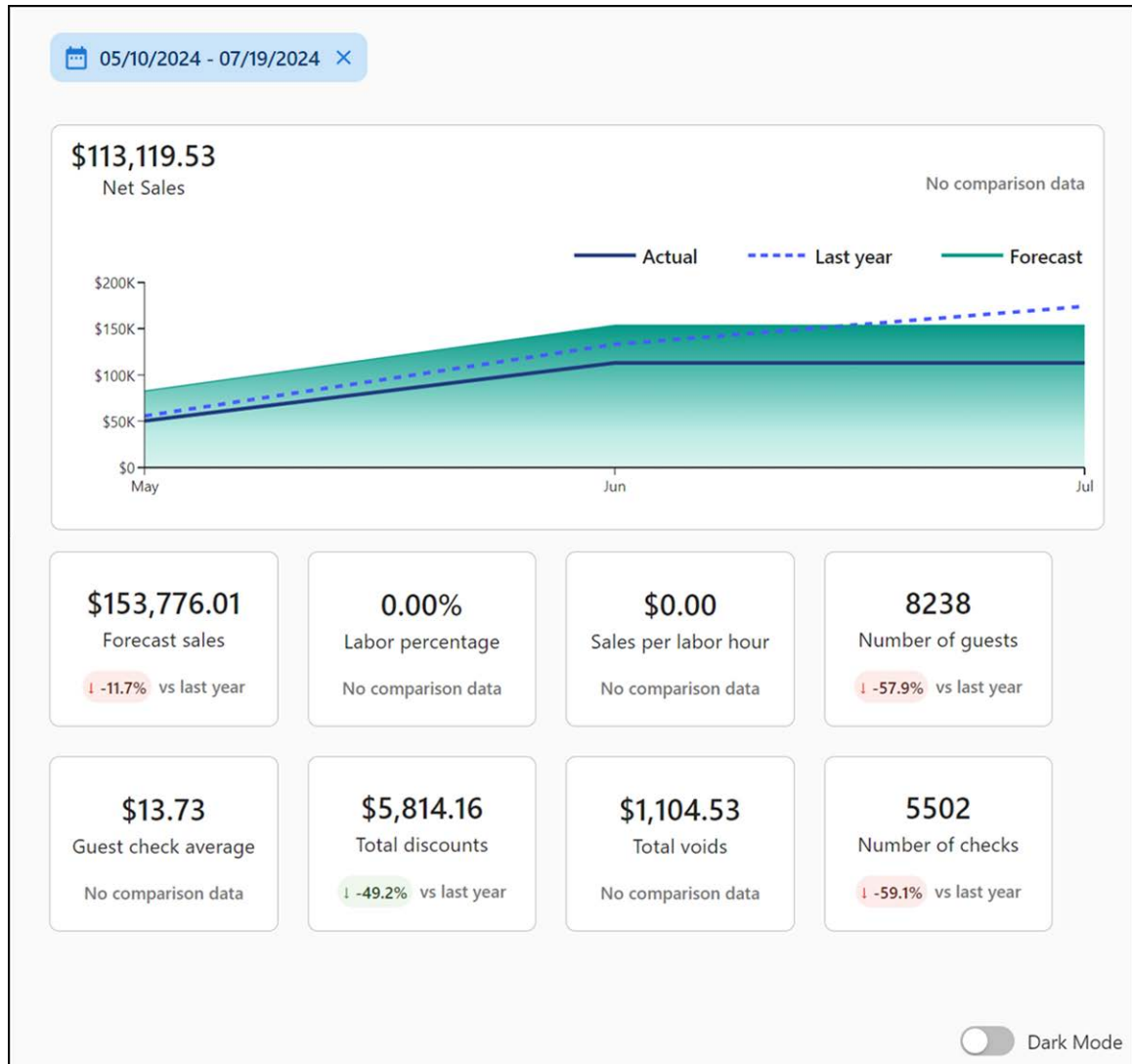


Switching apps

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.

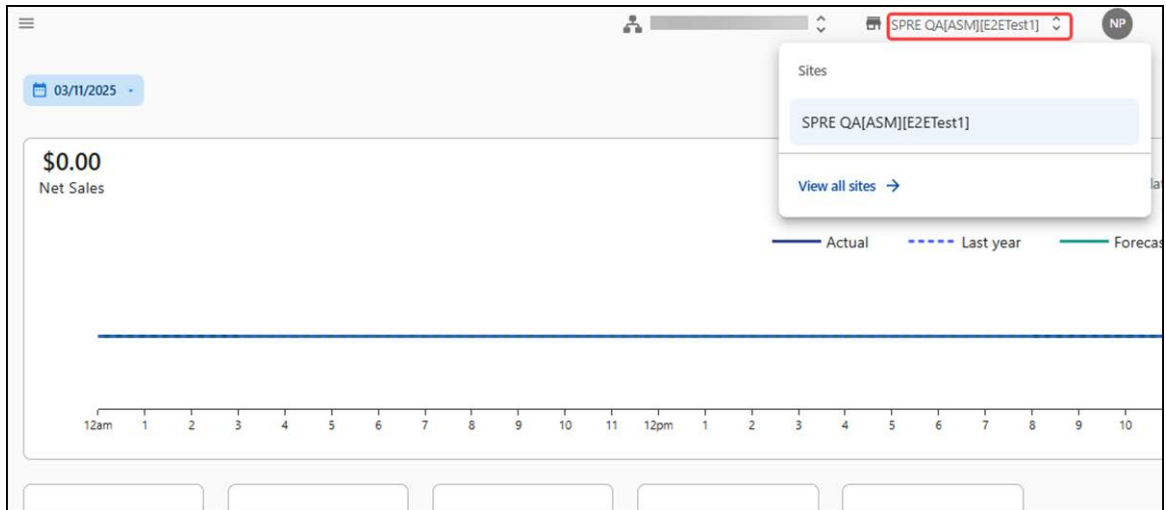
To change the dates to view on the dashboard:

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

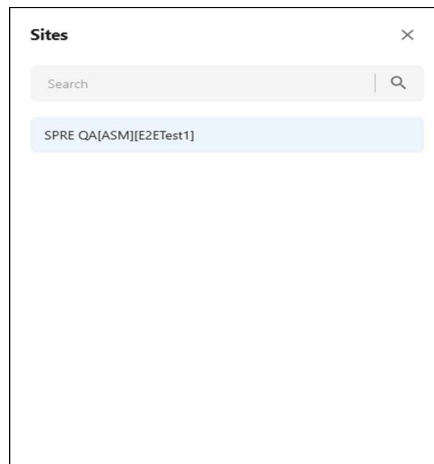
The dashboard displays for the default site assigned to you. If you use a multi-store account, you can easily switch from one site to another to view data and perform tasks within that site.

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.

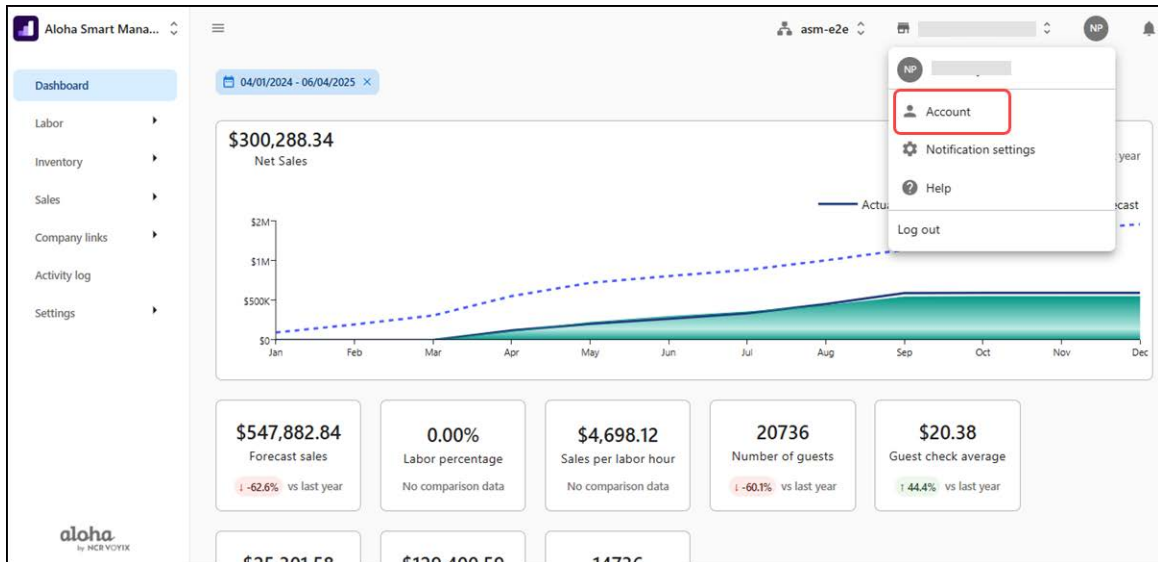


Selecting sites

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.

The screenshot shows the 'NCR VOYIX Account' interface. On the left is a sidebar with three menu items: 'Profile' (selected), 'Preferences', and 'Security'. The main area is titled 'Profile' and includes the instruction 'Update and manage your personal details in one place.' Below this are three form sections: 'Basic info' (with fields for First name, Last name, Date of birth, and Phone number), 'Email' (with an email address and a 'Change email' button), and 'Address' (with fields for Address and County). Each section has a pencil icon in the top right corner for editing.

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.

The screenshot shows the 'NCR VOYIX Account' page. On the left is a navigation pane with 'Profile', 'Preferences' (highlighted), and 'Security'. The main area is titled 'Preferences' with the subtitle 'Update and manage your preferences in one place.' It contains two sections: 'Defaults' and 'Display'. The 'Defaults' section has an 'Organization' field with a 'Set default organization' button. The 'Display' section has a 'Display name' field with a 'Change' button and a 'Theme' dropdown menu set to 'System'.

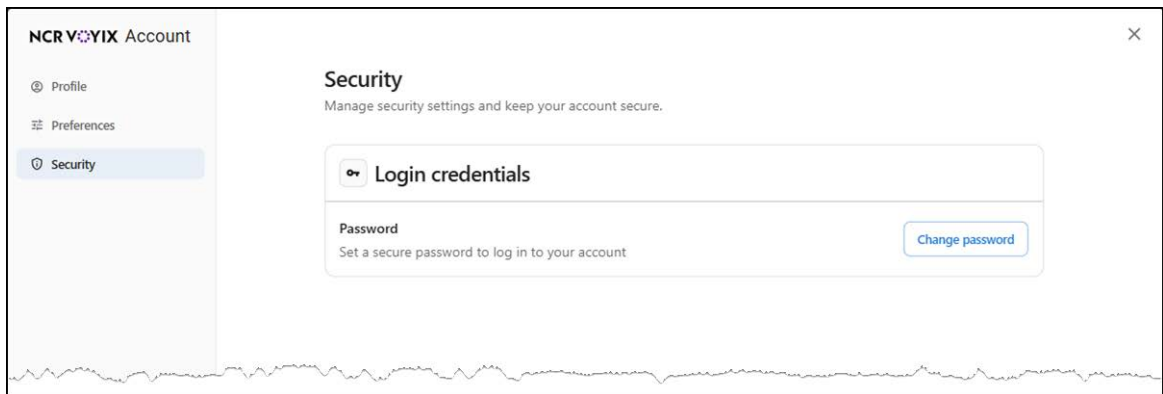
Edit the Preferences page

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.

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

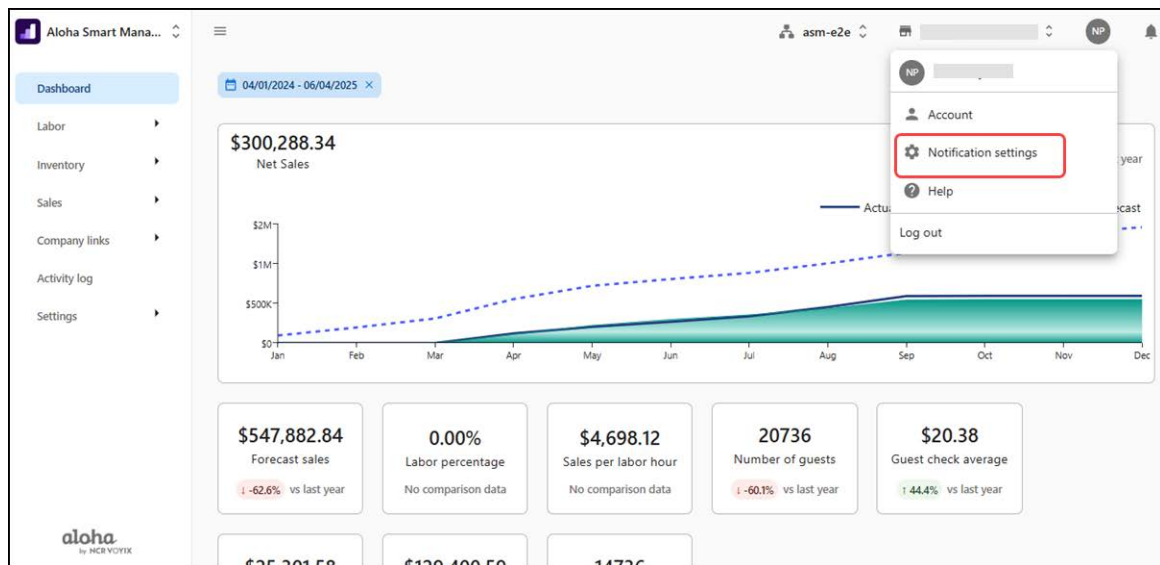
2. Under the Login credentials group bar, click **Change password** to display the Change Password screen.

A screenshot of the 'Change Password' dialog box. It has three input fields: 'Current Password *', 'New Password *', and 'Confirm password *', each with an eye icon for toggling visibility. To the right is a 'Password requirements' section with a list of criteria: '12 characters', '1 upper case letter', '1 lower case letter', '1 number', and '1 special character' (all marked with red X's), and 'Must not contain First Name or Last Name' and 'Passwords match' (both marked with green checkmarks). A 'View password policy' link is at the top right. A 'Submit' button is at the bottom.

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

This is a list of your notification groups. Each notification group has its own settings and can be customized individually so you can prioritize and know what's important to you.

Edit or delete a group using the icons in the corresponding row, or create a new group.

[Create new notification group](#)

Group Name	Num. Events	Sites	Notification Methods	Actions
Email check 1	1	ASM Lab 491 441 QS	Email, In-App	
feb1smoke2	3	ASM Lab 491 441 QS	In-App	
Labor Rules	2	491-POS_BDDBaselineQS, ASM Lab 491 441 QS	In-App	
Labor Rules 2	3	491-POS_BDDBaselineQS, ASM Lab 491 441 QS	Email, In-App	
new	2	ASM Lab 491 441 QS	Email, In-App	
Schedule Publishing	2	491-POS_BDDBaselineQS, ASM Lab 491 441 QS	Email, In-App	

'Notification settings' screen

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

Aloha Smart Manager

My account

Account preferences

Notification settings

Notification Group Settings

Customize what notifications you get and how you receive them. You can include an event in more than one notification group

Notification group name *

We Deliver

Sites *

QE Staging Acceptance Site

☒ Priority

Priority notifications are the most important. Priority notifications stay at the top of the list of notifications despite how old they are until they are read or deleted.

☒ Email

Receive email at: ncr.cbo.eng.qe.adm+admin@gmail.com

☒ SMS

You will receive a text message at 555

☒ In-App

You will always receive a notification in the app

Events

Type	Event	Threshold	Description
☒ Scheduling	Schedule Published	1 week	A schedule has been published
☐ Ruling	Labor rule updated		Labor rule updated

[Cancel](#) [Save](#)

'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.



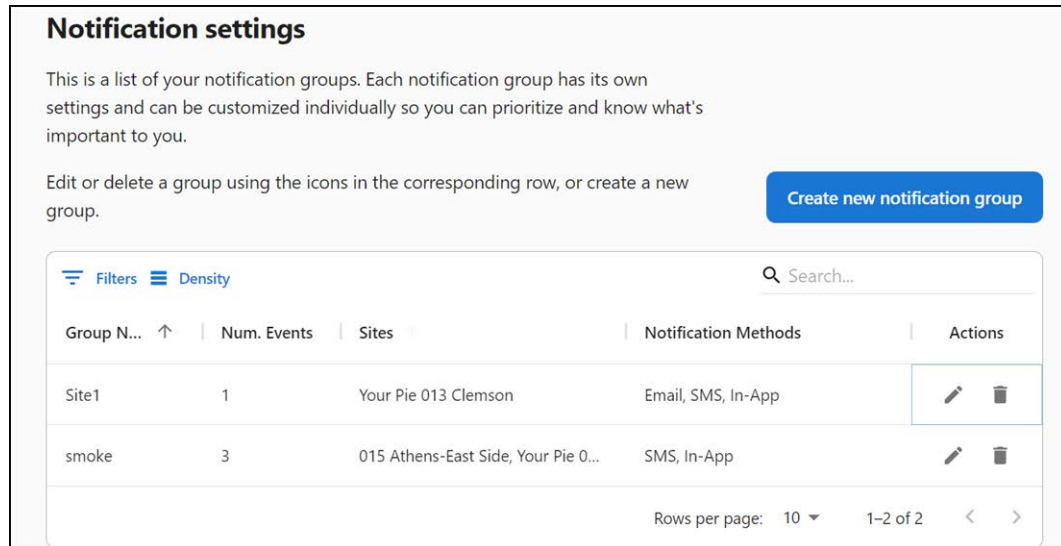
Tip

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

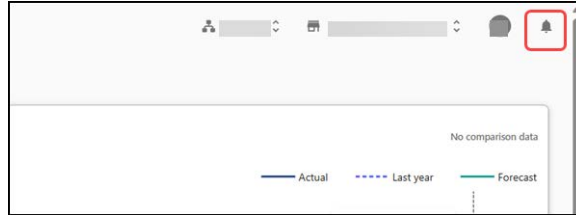
If you opted to send an in-app notification, the bell-shape icon at the top-right corner of the dashboard highlights to let the recipient know a notification is sent.

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.

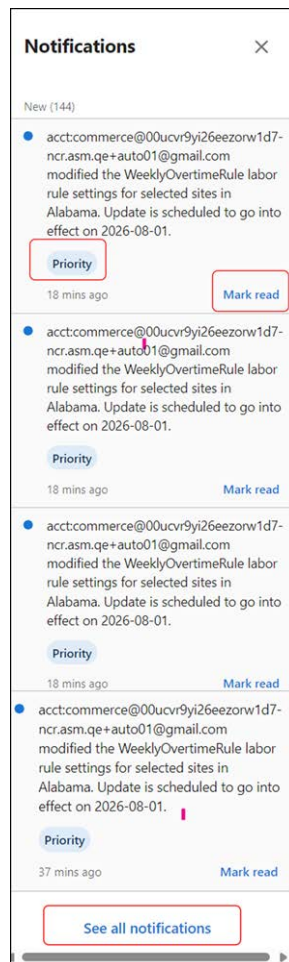
To view a notification:

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.

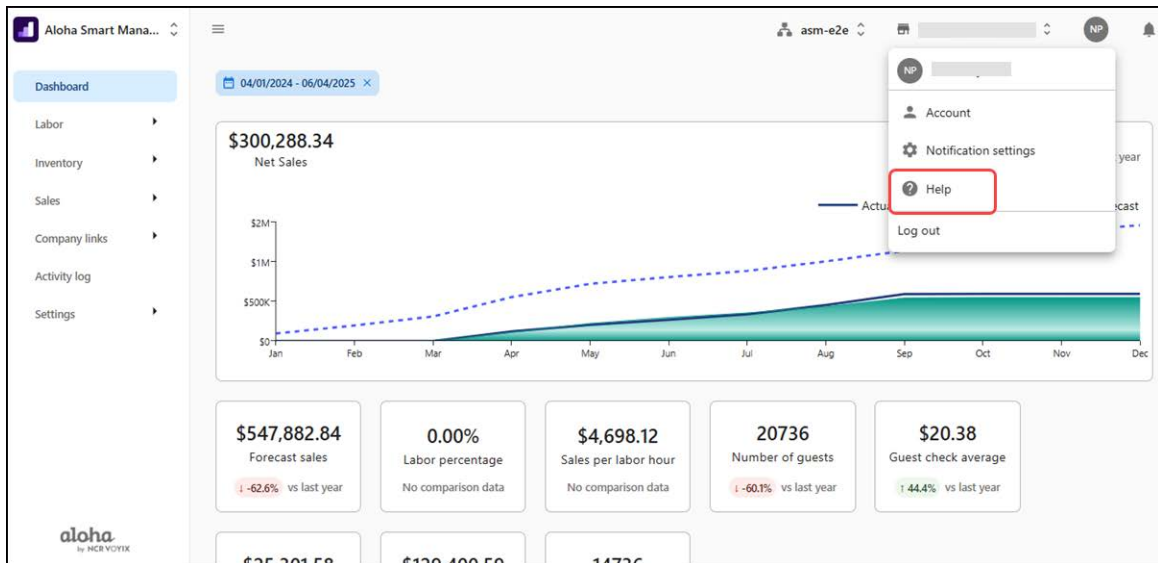


All notifications

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

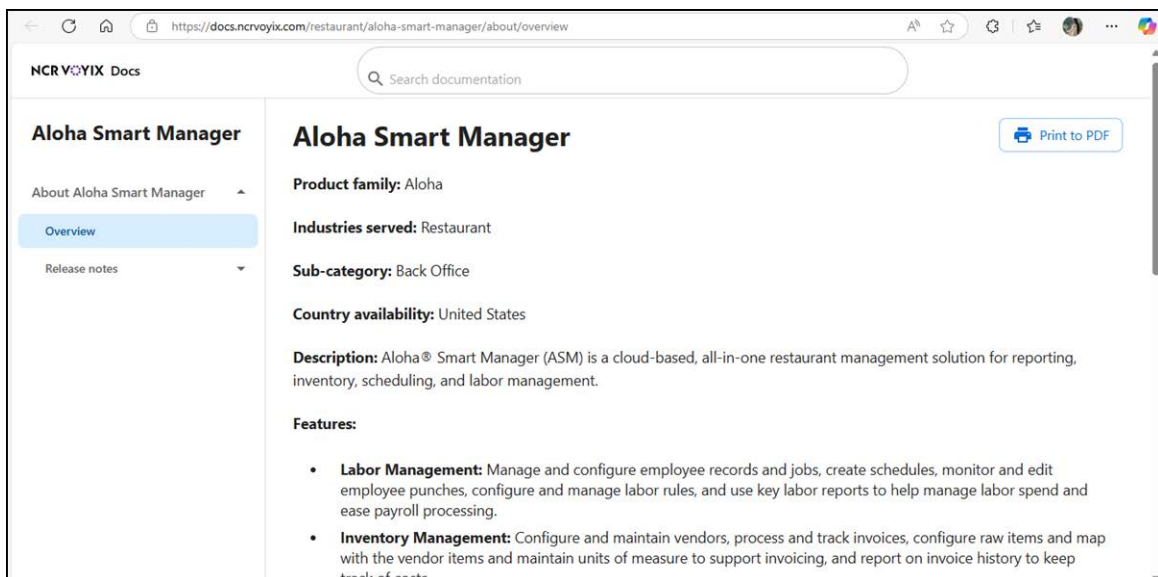
Accessing Help

Use the 'Help' link to enhance your user experience and obtain assistance whenever needed for any feature. This link redirects you to the [documentation website](#), where you can find detailed descriptions of every feature and instructions on how to use them.



Navigating help feature

To use the help link, click the **Profile icon** and select **Help** from the menu that appears.



Docs portal home page

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.

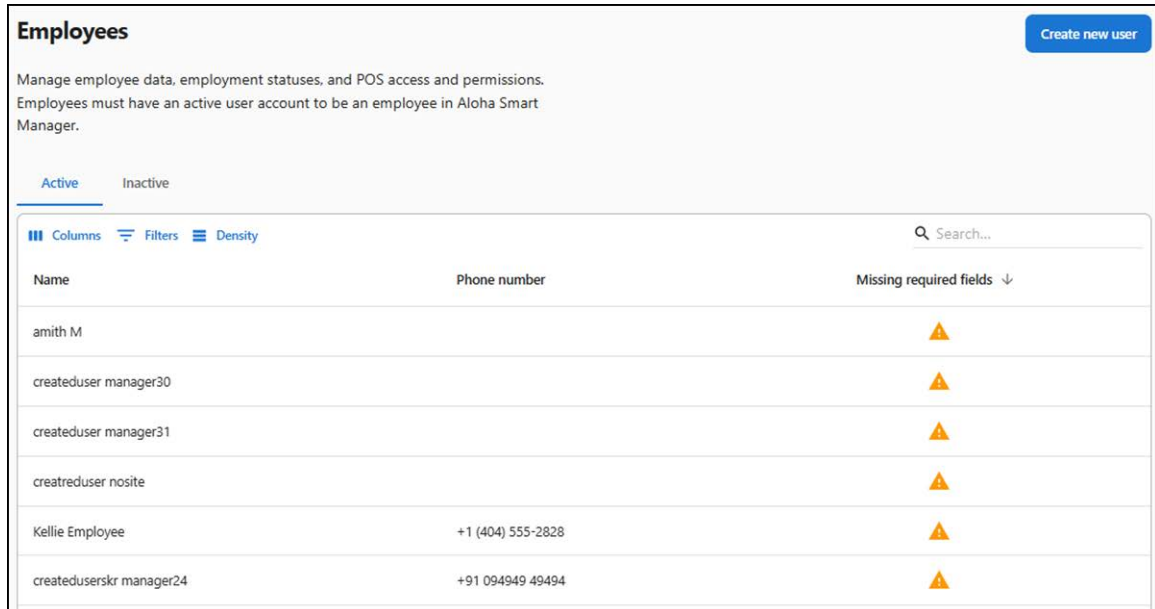
This module also allows you to effectively manage the business, optimize the workforce, improve productivity, and provide better customer service.

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.

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 Management Quickstart Guide](#) for more information.

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

Employees			Create new user
Manage employee data, employment statuses, and POS access and permissions. Employees must have an active user account to be an employee in Aloha Smart Manager.			
Active Inactive			
Columns Filters Density			Search...
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.

Create User

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

Basic information

* Indicates required fields

First name *
First name

Last name *
Last name

Email *
name@domain.com

Date of birth
MM/DD/YYYY

Phone number
123-456-7890

Permissions

Location access

Local device login

Address

Cancel Create user

'Create User' screen in NCR Identity



Reference

Refer to the [NCR Identity Management 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.
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 for the user you are creating to perform for each of the hosted applications.

The screenshot shows a 'Create User' form. At the top, there's a header 'Create User' with a close button. Below it are input fields for email (lrmangelmom@mindspring.com), phone number (123-456-7890), and a date field (MM/DD/YYYY). The 'Permissions' section is expanded, showing a dropdown menu set to 'Employee'. Below this, there's a list of applications with roles: Identity (Assign role), Aloha Smart Manager (Employee), Location access, Local device login, and Address. At the bottom right, there are 'Cancel' and 'Create user' buttons.

'Permissions' screen

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



Note

A user role called **Above Store Manager** is available in the Identity app for users who have permission to see it. This user role has permissions to add a manager, restaurant manager, assistant manager, and more. The role of Above Store Manager can access ASM by entering the user id, and password. The user role when navigates to Labor has edit access to view or edit the list of managers, assistant managers and more.



Important

ASM does not display the **Above Store Manager** user role in the Employee list or function as an ASM Employee. The user role will not have access to the POS.

10. Expand **Location access**.

Create User

Identity Assign role

Aloha Smart Manager Employee

Location access

1 site selected

Search...

☐ 491-POS_BDDBaselineQS
f98de8e47531412a80b4c380e5e64d48

☒ ASM Lab 491 441 QS
63fe3c19fe8a461eba3f7e9fbc9a8f04

1-2 of 2 < >

Local device login

Address

Cancel Create user

'Location access' screen

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

12. Expand **Local device login**.

Create User

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

Basic information

Permissions

Location access

Local device login

Device login

Address

14789

Cancel

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.

Identity

Dashboard

Invites

Users

Location Access

Users

Columns

Density

Filters

Email

First Name

Last Name

Status

Actions

ab185578@ncr.com

Anisha

Bhogale

Active

ad185198@ncr.com

Alex

Dyrbusch-Steenbergh

Active

am185235@ncr.com

Angle

Morse

Active

angiefmorse+multi@gmail.com

Angle

Mose

Active

angiefmorse+MultiMgr@gmail.com

Angle

Morse

Active

ap185209@ncr.com

Alex

Popu

Active

bg185133@ncr.com

Belinda

Goodman

Active

bh185088@ncr.com

Brad

Hudson

Active

bl185052@ncr.com

Ben

Lincoln

Active

bm185264@ncr.com

Benjamin

McKinley

Active

1-10 of 120

User Laurie Davis has been successfully created. Click [here](#) to manage this user.

Create new user

‘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.

The screenshot displays the 'Employee information summary screen' within the Aloha Smart Manager application. The interface features a left-hand navigation menu with options: Identity, Dashboard, Invites, Users, and Location Access. The main content area is titled 'Irmangelmom@mindspring.com' and includes tabs for Profile, Permissions, Enterprise Units, Enterprise Unit Groups, and Status History. The 'Profile' tab is active, showing a summary of employee information organized into sections: Basic info, Contact info, Address, and Local device login. Each section contains fields for personal and contact details, with some fields marked as required (indicated by an asterisk). The 'Basic info' section includes First Name (Laurie), Last Name (Davis), Date of birth, and Status (Active). The 'Contact info' section includes Phone Number and Email (Irmangelmom@mindspring.com). The 'Address' section includes Address (Fort Worth, TX 75163, United States) and County/Province (Tarrant). The 'Local device login' section includes a Device login field. The bottom of the screen shows 'Powered by NCR VOYIX'.

Basic info	
First Name	Laurie
Last Name	Davis
Date of birth	-
Status	Active (Last updated 2025-02-21T17:41:09Z)

Contact info	
Phone Number	-
Email	Irmangelmom@mindspring.com

Address	
Address	Fort Worth, TX 75163 United States
County/Province	Tarrant

Local device login	
Device login	-

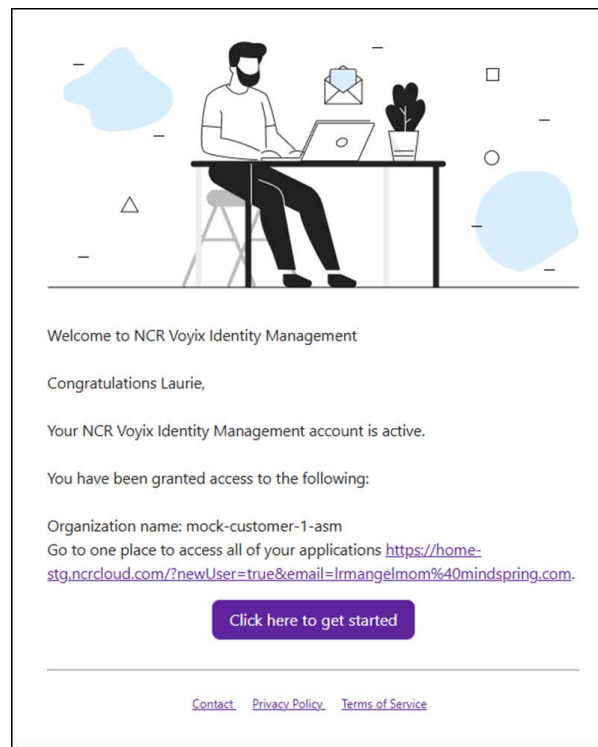
Employee information summary screen

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.

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

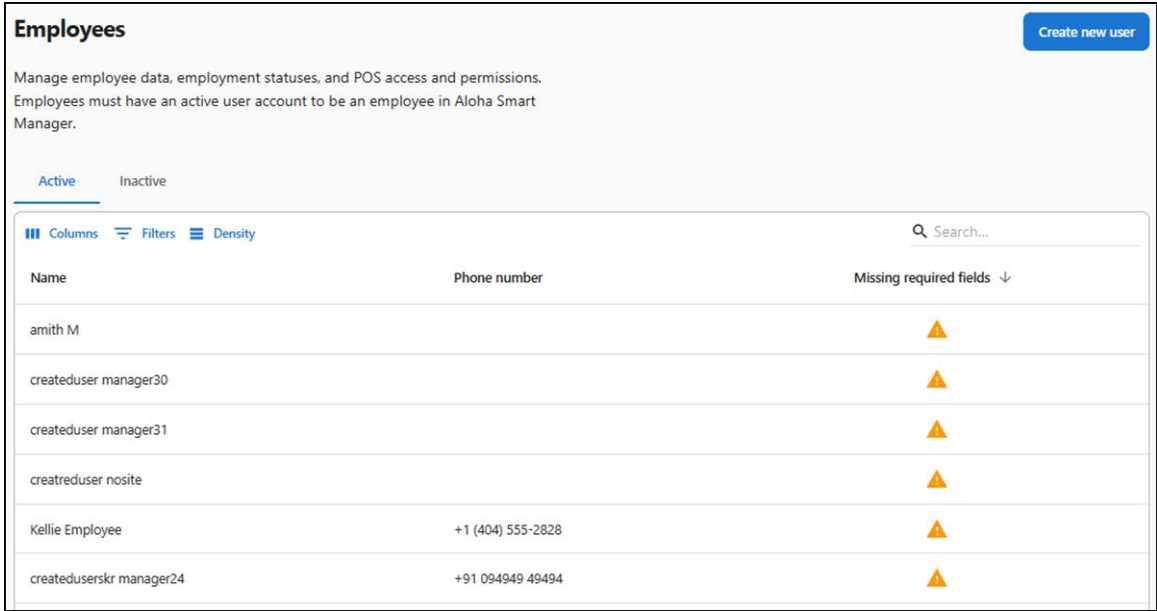
2. Within the email text, click **Click here to get started**. The 'Create your NCR account' screen appears.
3. If you need additional information on how to create your account, please refer to the [Identity Management Quickstart Guide](#).

Step 3: Assigning a job to a new employee.

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 

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

[Manage user](#)

 **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
--------------------------	--

 **Address** 

-

 **Local device login** 

Device username -

 **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’s name. The **Jobs** screen appears.

employees / Prafulla Nayak

Prafulla Nayak

Manage user

Profile

Jobs

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

Jobs

Job type

-

Active jobs

Filters

Density

Search...

Job	Pay rate	Effective date	Performance rating
No rows			

Rows per page: 10 0-0 of 0

Job history

Columns

Filters

Density

Search...

Job	Pay rate	Effective date	Modified date	Modified by
No rows				

Rows per page: 10 0-0 of 0

'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

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 *

Effective date

Performance rating

Actions

3/12/2025

☆☆☆☆☆

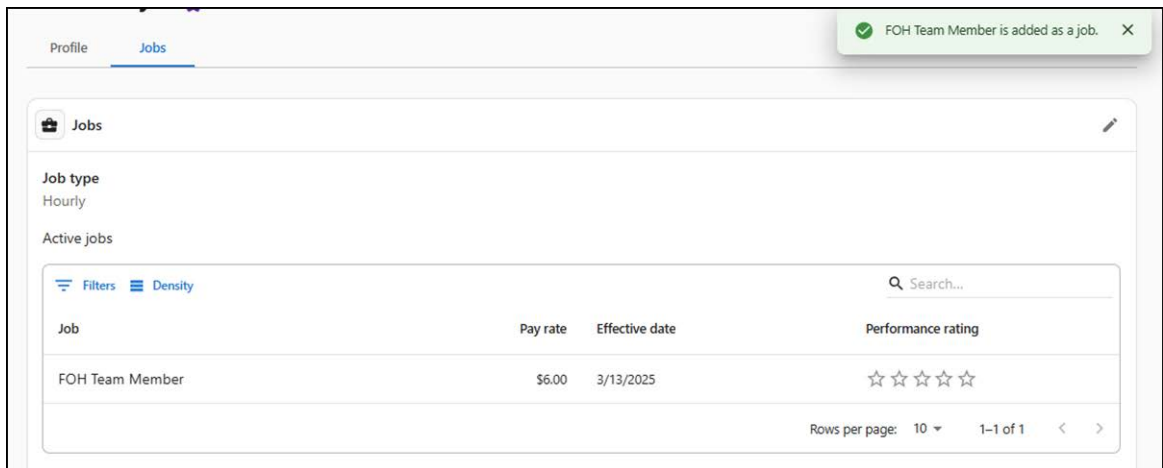
Rows per page: 10 1-1 of 1

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.

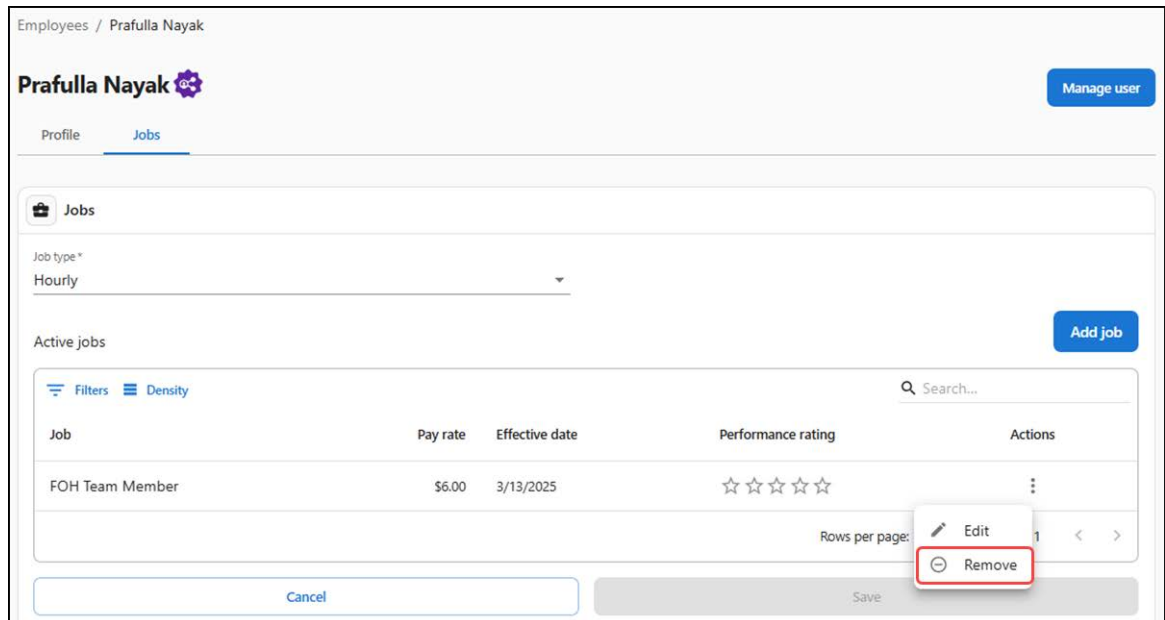
Removing a job for an employee

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:

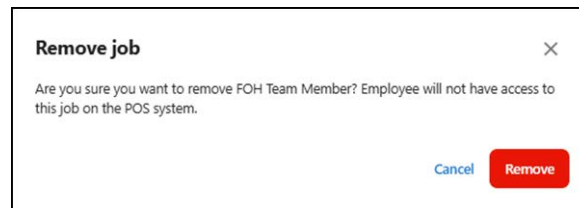
1. Select **Labor > Employees**. The 'Employees' screen appears.
2. Select the **employee** in the Active tab. The employee profile screen appears.
3. Select the **Jobs** tab under the employee's name. The **Jobs** screen appears.

- 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

Once the employee data is filled in the Profile tab of Employees screen, it 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.

Employees / Prafulla Nayak

Prafulla Nayak 

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

[Manage user](#)

 **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
--------------------------	--

 **Address** 

-

 **Local device login** 

Device username -

 **Certifications** 

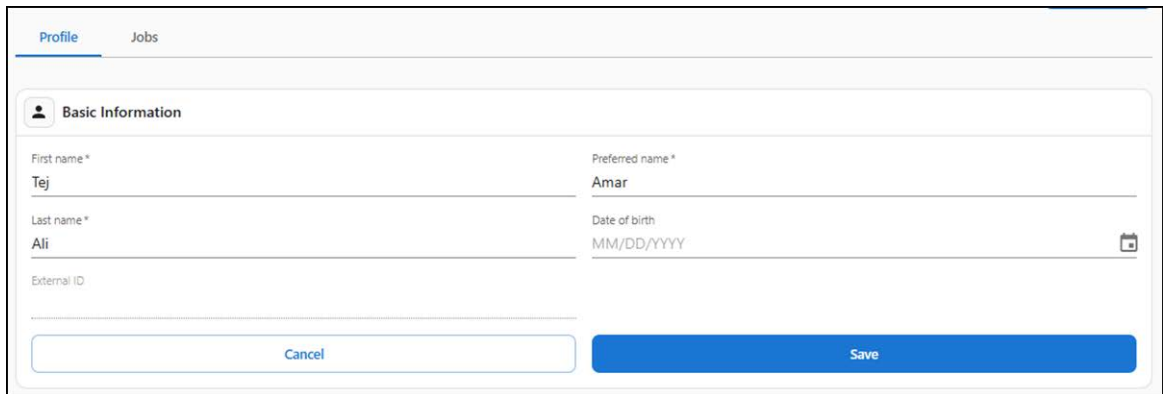
Certificate name -	Certificate number -
Certificate expiration -	

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.

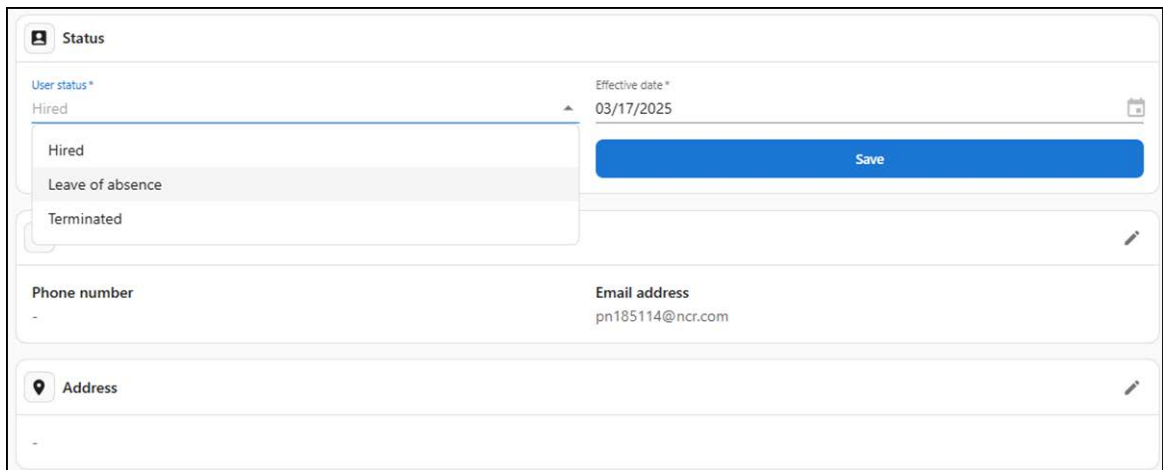
3. Click the **pencil icon** at the right end of the **Basic information** group bar.



The screenshot shows the 'Profile' tab of an employee's record. The 'Basic Information' group bar is active, indicated by a pencil icon on the right. The form contains the following fields: 'First name *' with the value 'Tej', 'Preferred name *' with the value 'Amar', 'Last name *' with the value 'Ali', 'Date of birth' with a calendar icon and the placeholder 'MM/DD/YYYY', and 'External ID' which is 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**.

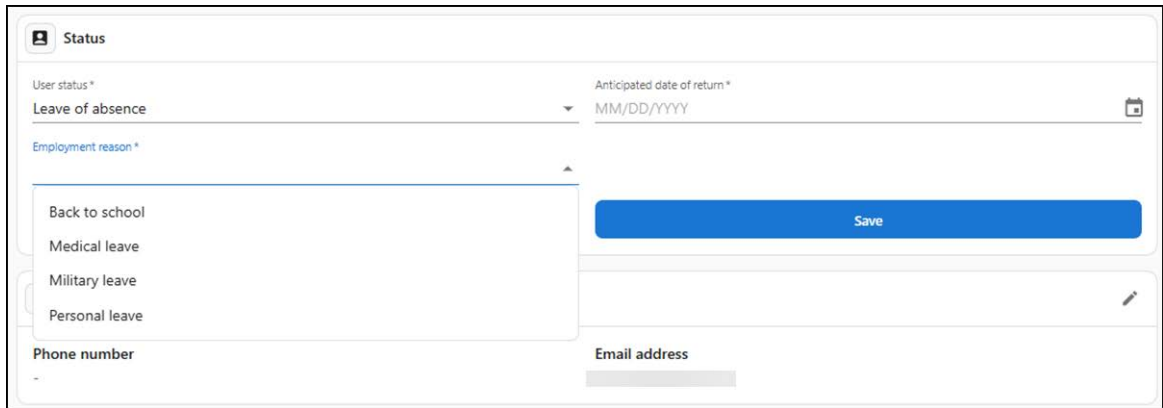


The screenshot shows the 'Status' tab of an employee's record. The 'User status *' dropdown menu is open, showing three options: 'Hired', 'Leave of absence', and 'Terminated'. The 'Effective date *' field is set to '03/17/2025' with a calendar icon. Below the status dropdown is a 'Save' button. Further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

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.

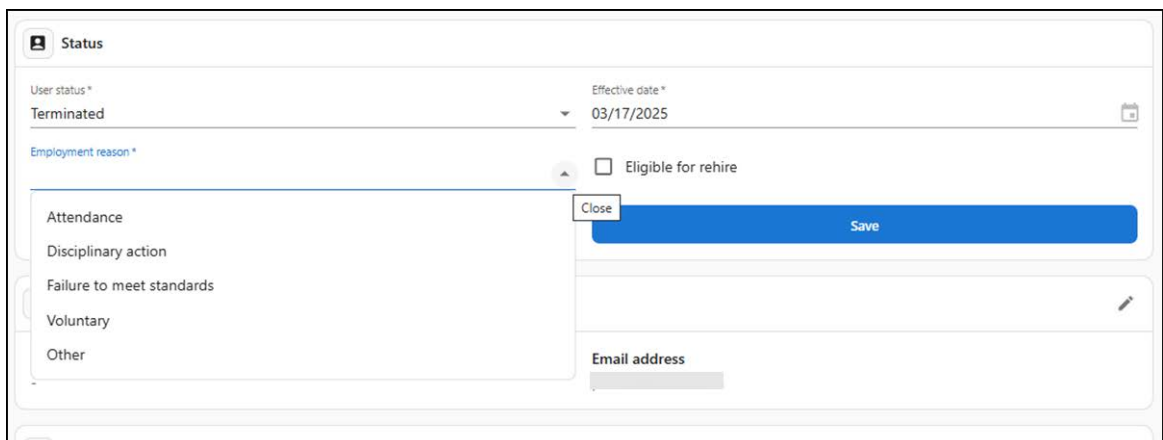
8. Select **Hired** to indicate the employee is available for scheduling. Hired is the default status for active employees. You cannot change the 'Effective date' for employees if the User Status is Hired.



The screenshot shows the 'Status' form in the Aloha Smart Manager system. 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'. A 'Save' button is visible on the right. Below the dropdown, there are fields for '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**.

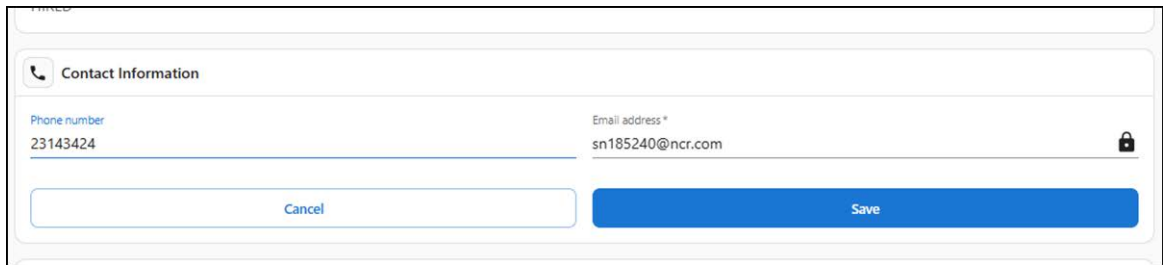


The screenshot shows the 'Status' form with 'Terminated' selected for 'User status'. The 'Effective date' is set to '03/17/2025'. The 'Employment reason' dropdown is open, showing options: 'Attendance', 'Disciplinary action', 'Failure to meet standards', 'Voluntary', and 'Other'. There is a checkbox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

Employee termination

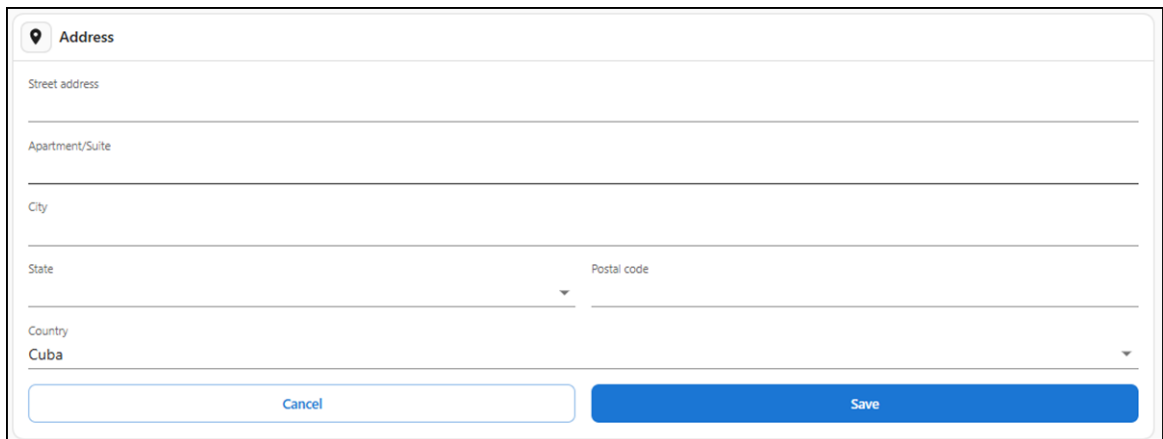
Select **Terminated** to indicate an employee is terminated. When you terminate an employee, you must provide a **reason** for the termination and the **date** on which the termination is effective. Select **Eligible for rehire** if you want to rehire an employee after termination.

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

A screenshot of a web form titled "Contact Information" with a phone icon. It contains two input fields: "Phone number" with the value "23143424" and "Email address*" with the value "sn185240@ncr.com". A lock icon is visible on the right side of the email field. At the bottom are "Cancel" and "Save" buttons.

Employee contact information

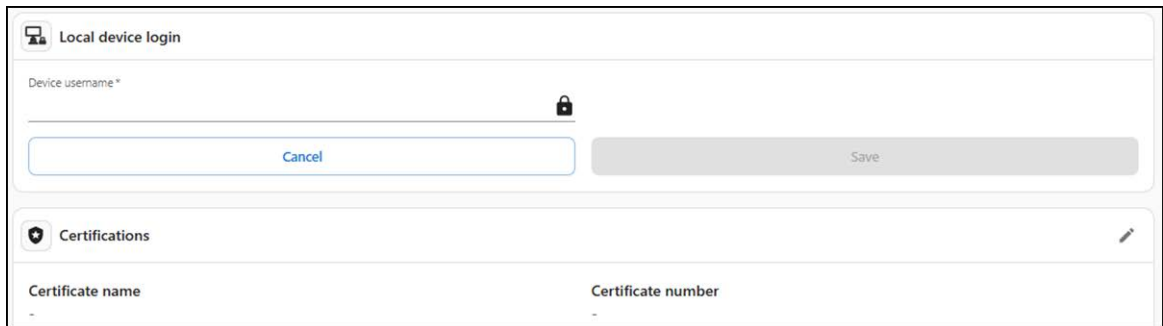
10. Click the **pencil icon** at the right end of the **Contact Information** group bar to edit or change the address of the employee.
11. Type the **Phone number** and **Email address** of the employee.
12. Click **Save**.

A screenshot of a web 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 showing "Cuba"). At the bottom are "Cancel" and "Save" buttons.

Employee address

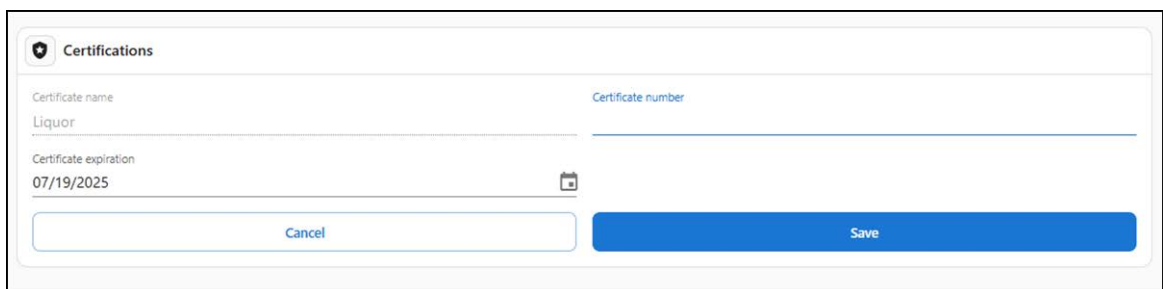
13. Click the **pencil icon** at the right end of the **Address** group bar to edit or change the address of the employee.
14. Type your **Street address**, **Apartment/Suite**, **City**, and **Postal code**.
15. Select the **State** and **Country** from the drop-down list.

16. Click **Save**.

The screenshot shows a web form titled "Local device login" with a computer icon. It contains a "Device username*" label and a text input field. To the right of the input field is a lock icon. Below the input field are two buttons: "Cancel" and "Save". The "Save" button is currently disabled (grayed out).

Employee local device login

17. 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 web form titled "Certifications" with a shield icon. It contains two labels: "Certificate name" and "Certificate number". Below "Certificate name" is a text input field with the value "Liquor". Below "Certificate number" is a text input field. Below these fields is a "Certificate expiration" label with a date input field containing "07/19/2025" and a calendar icon. At the bottom are two buttons: "Cancel" and "Save".

Employee certifications

18. Click the **pencil icon** at the right end of the **Certifications** group bar to edit or change the certifications of the employee.

19. Enter the **Certificate number** of the license.

20. Type the **date** or **select it from the calendar** when the certification expires.

21. Click **Save**.

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 describe the 'Schedule' screen:

Schedule

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	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						
Achvita 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

NCR VOYIX

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Use and Disclose Solely Pursuant to Company Instructions

40

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. Example 'Desert contest this week.'
Schedule viewer	Schedule viewer (calendar view of a specific week). The calendar view lists the following details: • Name of the employee for whom the shift is scheduled. • Total number of hours the employee has worked for the selected week. For example, if the employee'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 creates, views, publishes, and prints the weekly schedule based on the date selection. Also, ASM provides you with the weekly employee schedule which helps in calculating and displaying the daily/weekly hours by employee. This helps you to understand if you are properly distributing the hours to your employees and to meet staffing needs for the restaurant while adding employee weekly schedule shifts.

Also, you can view:

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

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

Schedule																																			
Last published 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	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 <table> <tr> <td>Historic sales average</td><td>\$3,504,997</td><td>\$3,502,302</td><td>\$5</td><td>\$38</td><td>\$644</td><td>\$595</td><td>\$982</td><td>\$429</td></tr> <tr> <td>Scheduled hours</td><td>148.50 hr</td><td>21.75 hr</td><td>34.50 hr</td><td>16.00 hr</td><td>38.25 hr</td><td>20.00 hr</td><td>17.00 hr</td><td>1.00 hr</td></tr> <tr> <td>Scheduled labor cost %</td><td>0.08 %</td><td>0.01 %</td><td>15629.00 %</td><td>881.02 %</td><td>114.65 %</td><td>56.03 %</td><td>26.30 %</td><td>2.38 %</td></tr> </table>									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 %
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.

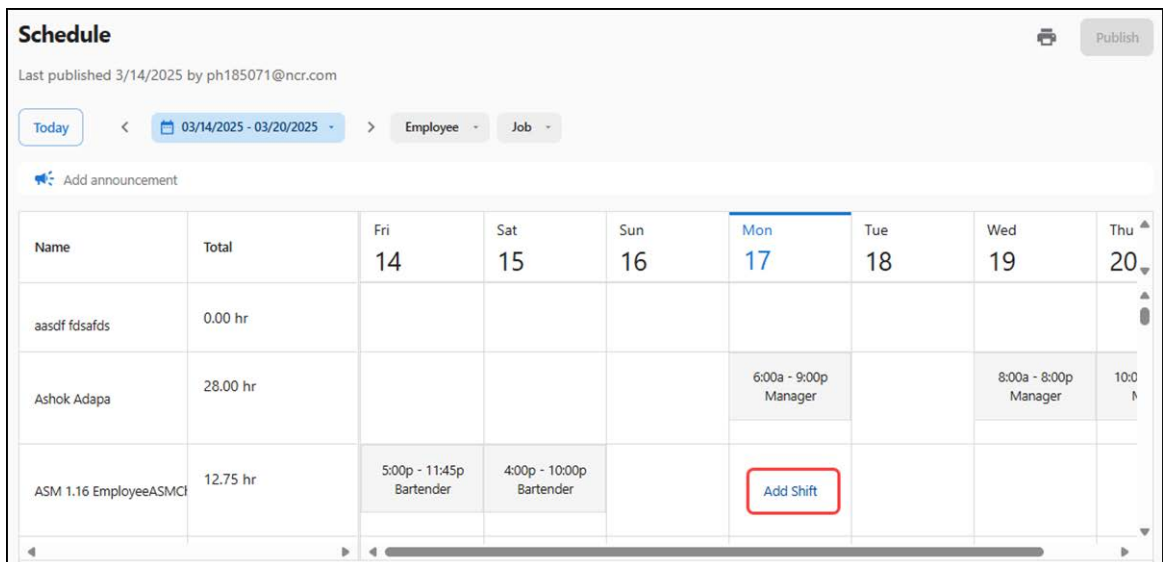
Select the **range** from the calendar picker.

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 14	Sat 15	Sun 16	Mon 17	Tue 18	Wed 19	Thu 20
aasdf fdsafds	0.00 hr							
Ashok Adapa	28.00 hr				6:00a - 9:00p Manager		8:00a - 8:00p Manager	10:0 N
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.

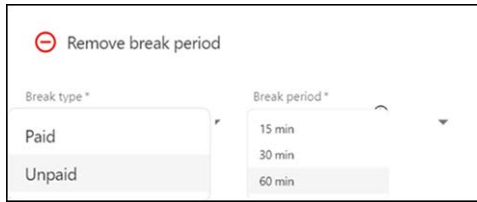
'Add Shift' screen

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

Job selection

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

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



Break type and period selection

6. Select one of the following **break types**:

Paid — Employee is paid if the break is taken. It is sometimes referred to as a 'rest break.'

Unpaid — Employee is not paid if the break is taken. It is sometimes referred to as a 'meal break.'

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



Note

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

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

Schedule

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

Today

< 03/14/2025 - 03/20/2025 >

Employee

Job

Add announcement

Name	Total	Fri 14	Sat 15	Sun 16	Mon 17	Tue 18	Wed 19	Thu 20
aasdfsdfsdfs	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 EmployeeASMC	20.75 hr	5:00p - 11:45p Bartender	4:00p - 10:00p Bartender		9:00a - 5:00p Cashier			

Success message

Filtering shifts by job or employee

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

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

Schedule		04/04/2025 - 04/10/2025						
Last published 4/7/2025 by se185036@ncr.com		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	
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

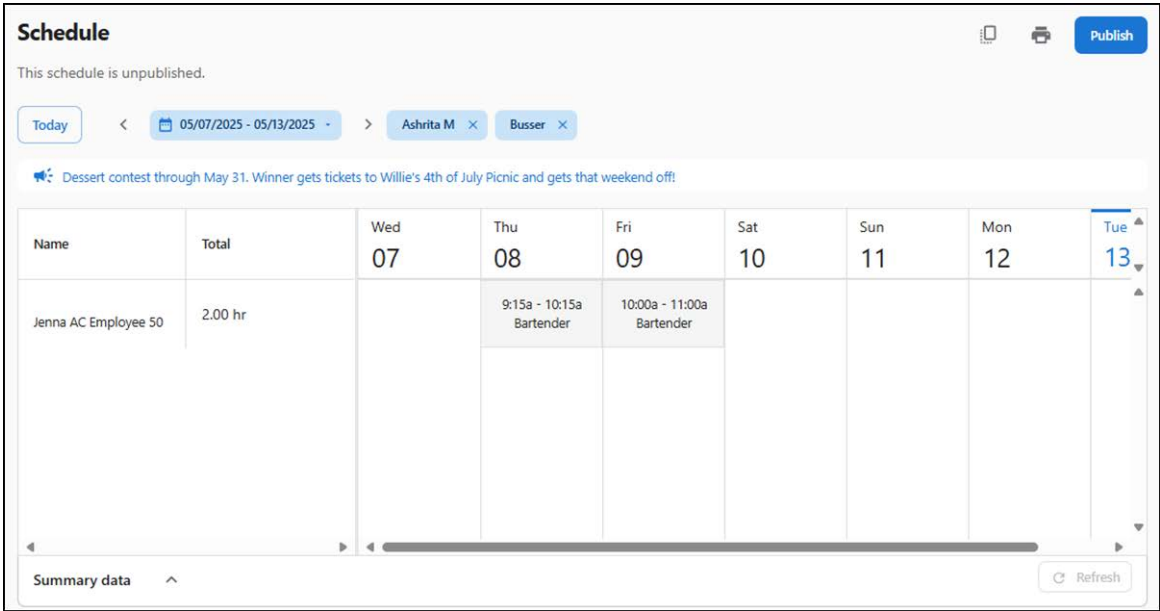
2. To display all shifts assigned to a job, select the **job** from the 'Job' drop-down list.
3. To display all shifts assigned to an employee, select the **employee** from the 'Employee' drop-down list.

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.

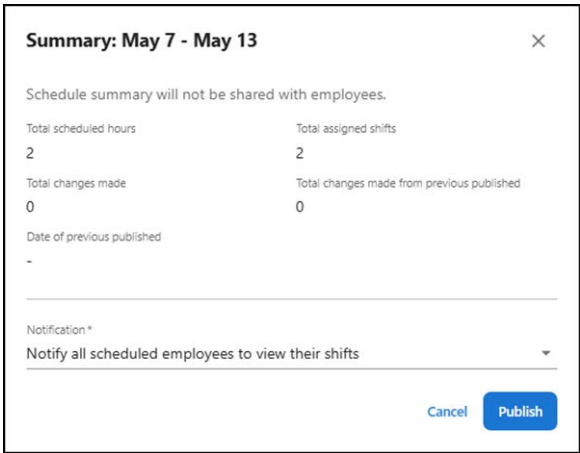
To publish a schedule:

1. Select **Labor > Schedule**. The ‘Schedule’ screen appears.



‘Publish’ on Schedule screen

2. Click **Publish** at right top corner of schedule screen.



Publish summary message

3. Click **Publish**.

Schedule

Last published 5/13/2025 by Polisetty Pratyusha

Today < 05/07/2025 - 05/13/2025 > Ashrita M X Busser X

🔔 Dessert contest through May 31. Winner gets tickets to Willie's 4th of July Picnic and gets that weekend off!

Name	Total	Wed 07	Thu 08	Fri 09	Sat 10	Sun 11	Mon 12	Tue 13
Jenna AC Employee 50	2.00 hr		9:15a - 10:15a Bartender	10:00a - 11:00a Bartender				

Summary data ^

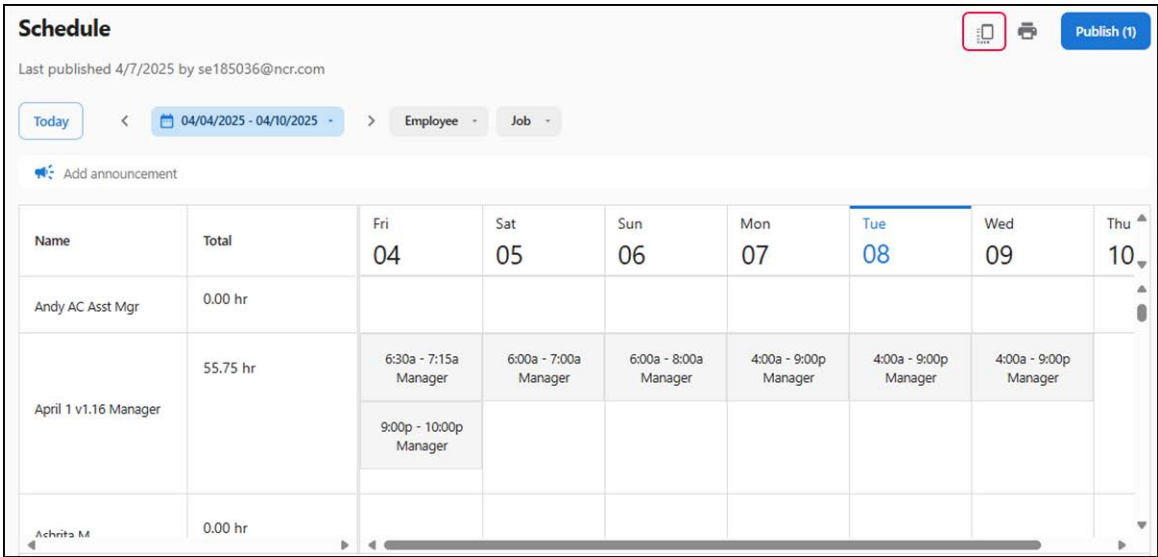
🔄 Refresh

Schedule confirmation detail

A confirmation detail appears on the page publishing the schedule.

Copying a schedule

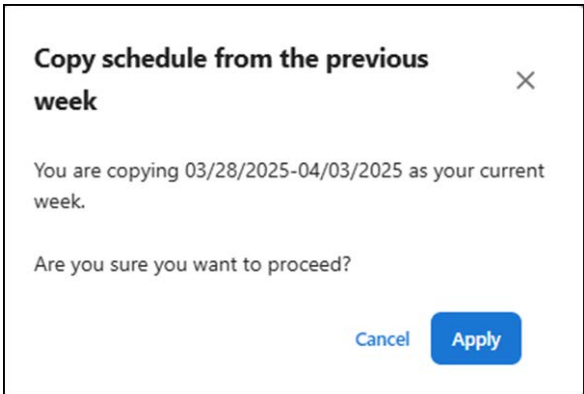
The ‘copy schedule’ feature for a manager is efficient, saving time by duplicating existing schedules. It is convenient, simplifying the process of creating new schedules with ease. Additionally, it ensures consistency across different shifts, making it user-friendly and flexible for quick adjustments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



Confirmation window

A confirmation screen appears as a pop-out with the selected date.

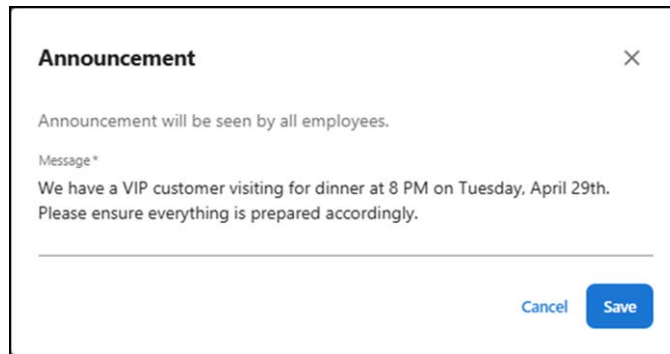
3. Click **Apply**. The system copies the schedule for the current-selected week and also all future schedule weeks as required.

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.

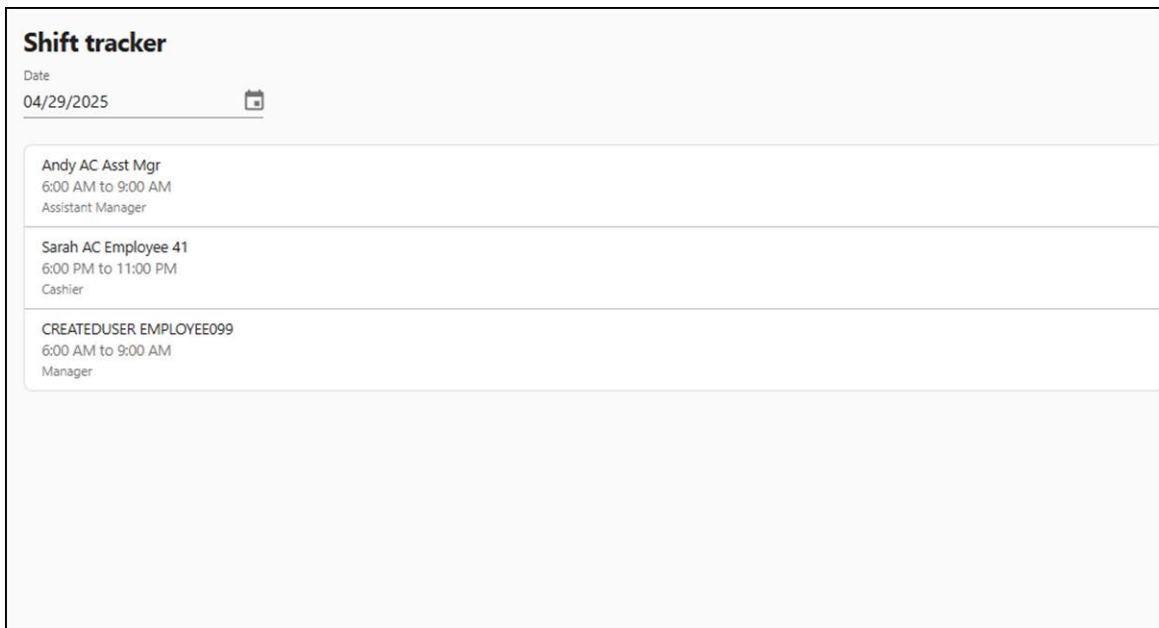
Viewing employees on a shift

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.



The screenshot shows the 'Shift tracker' interface. At the top, the title 'Shift tracker' is displayed. Below it, the date '04/29/2025' is shown next to a calendar icon. The main area contains a list of employees and their scheduled shifts:

Andy AC Asst Mgr	6:00 AM to 9:00 AM	Assistant Manager
Sarah AC Employee 41	6:00 PM to 11:00 PM	Cashier
CREATEDUSER EMPLOYEE099	6:00 AM to 9:00 AM	Manager

'Shift tracker' screen

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

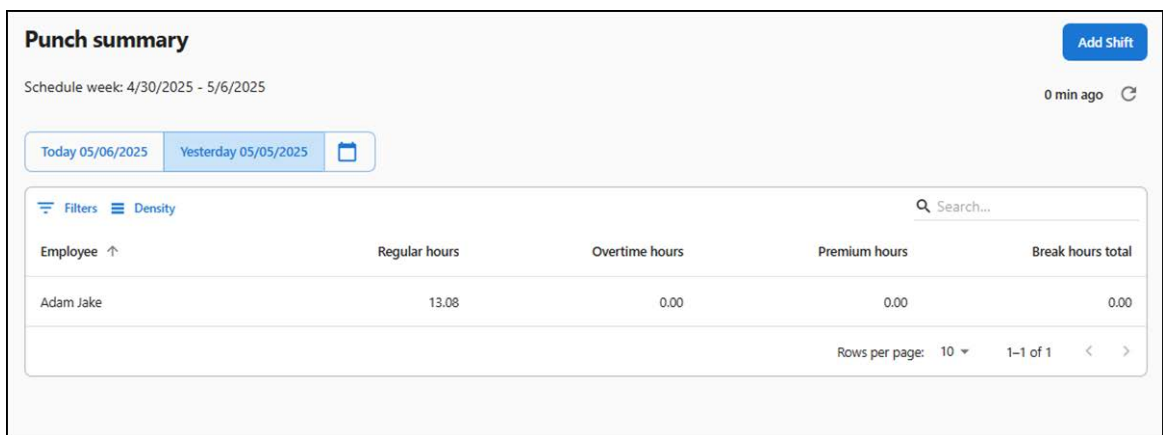
Working with punches

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 a new punch based on 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 shift:

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



Punch summary				
Schedule week: 4/30/2025 - 5/6/2025				
Today 05/06/2025 Yesterday 05/05/2025				
Filters Density				
Employee	Regular hours	Overtime hours	Premium hours	Break hours total
Adam Jake	13.08	0.00	0.00	0.00

'Punch summary' screen

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

Punch summary

Schedule week: 4/30/2025 - 5/6/2025

0 min ago

Today 05/06/2025 Yesterday 05/05/2025

Filters Density Search...

Employee ↑	Regular hours	Overtime hours	Premium hours
Adam Jake	13.08	0.00	0.00

Rows per page: 10 1-1 of 1

Add Shift

* Indicates required fields

Date * 05/05/2025

Read only

Employee * Select

Job * Select

Clock in * Clock out *

Regular hours

Cancel Save

'Add shift' screen

- Select the **Date** of the punch.
- Select the **Employee** associated with the punch.
- Select the **Job** the employee worked.

6. Enter the **Clock in and Clock out time** of the shift.

×

Close

Add Shift

* Indicates required fields

Date *

05/05/2025

Read only

Employee *

Select

Job *

Select

Clock in *

--:--

Clock out *

--:--

Regular hours

+ Add break period

Total sales

Declared tips

\$

Punch edit reason *

Select

Cancel

Save

'Add shift' screen

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

×

Close

⊖

Remove break period

Break type *

Select

▼

Break out *

Break in *

--:--

⌚

--:--

⌚

Break hours

⊕

Add break period

Total sales

Declared tips

\$

Punch edit reason *

Select

▼

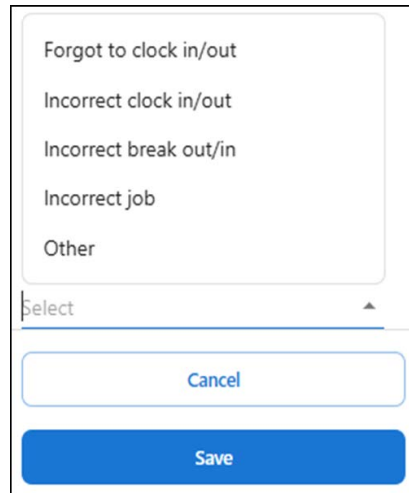
Cancel

Save

Break shift

- Break type** — Select the type of break. Select if paid or unpaid.
- Break out** — Select the time when the break started.
- Break in** — Select the time when the break ended.

8. View the employee **total sales**, if any. This is a read only field.
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 162](#).

A screenshot of a 'Punch edit reason' dialog box. It features a list of five options: 'Forgot to clock in/out', 'Incorrect clock in/out', 'Incorrect break out/in', 'Incorrect job', and 'Other'. Below the list is a 'Select' dropdown menu with an upward arrow. At the bottom are two buttons: a light blue 'Cancel' button and a dark blue 'Save' button.

Punch edit reason

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: 4/30/2025 - 5/6/2025

Today 05/06/2025

Yesterday 05/05/2025

Filters

Density

Search...

Employee ↑	Regular hours	Overtime hours	Premium hours	Break hours total
Jerin R	9.00	0.00	0.00	0.00
Adam Jake	13.08	0.00	0.00	0.00
Bono Popu	8.00	0.00	0.00	0.17

Rows per page: 10

1-3 of 3

<

>

✓

Punch detail added

×

0 min ago

'Punch summary' screen - Success message

The **Punch detail** adds to the screen and appears with the following details.

Column	Description
Employee	Name of the employee
Regular hours	Number of regular hours the employee worked for the selected date.
Overtime hours	Overtime hours the employee worked.
Premium hours	Total number of premium hours worked.
Break hours total	Total number of break hours.

To view shift details of an employee:

1. Select **Labor > Punch summary**. The 'Punch summary' screen for the active week appears.

Punch summary Add Shift

Schedule week: 4/30/2025 - 5/6/2025 0 min ago

Today 05/06/2025 Yesterday 05/05/2025

Employee ↑	Regular hours	Overtime hours	Premium hours	Break hours total
Adam Jake	13.08	0.00	0.00	0.00
Bono Popu	8.00	0.00	0.00	0.17
Jerin R	9.00	0.00	0.00	0.00

Filters Density Search...

Rows per page: 10 1-3 of 3

'Punch summary' screen

2. Use the **date picker** to select the **day/week** to view the shift detail.

3. Click the **employee** to view the shift detail. The shift details of the employee appear.

PUNCH SUMMARY / JERIN R

Jerin R

Shift details: 5/5/2025

0 min ago

Add Shift

Shift 1 of 1

Job	Clock in	Clock out	Hours
COOK	08:00 am	05:00 pm	9.00
Total sales	Declared tips	Source	
\$0.00	\$0.00	Manual	
Regular hours	Overtime hours	Premium hours	
9.00	0.00	0.00	
Modified by	Punch edit reason		
default	Incorrect break out/in		

‘Shift details’ of an employee

The shift details of the employee appear with the following details:

Job	Job of the employee.
Clock in	Clock in time of the employee.
Clock out	Clock out time of the employee.
Hours	Number of hours worked.
Total sales	The total sales of the employee.
Declared tips	The total declared tips.
Source	Source of the tips.
Regular hours	Regular hours worked.
Overtime hours	Overtime hours worked.
Premium hours	Premium hours worked.
Modified by	Punch modified by.
Punch edit reason	The reason to edit punch.

To edit shift details:

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

Punch summary

Schedule week: 4/30/2025 - 5/6/2025

0 min ago

Add Shift

Today 05/06/2025Yesterday 05/05/2025

FiltersDensity

Search...

Employee ↑	Regular hours	Overtime hours	Premium hours	Break hours total
Adam Jake	13.08	0.00	0.00	0.00
Bono Popu	8.00	0.00	0.00	0.17
Jerin R	9.00	0.00	0.00	0.00

Rows per page: 101-3 of 3

'Punch summary' screen

3. Click the **employee** to edit the shift detail. The shift details of the employee appear.

PUNCH SUMMARY / ADAM JAKE

Adam Jake

Shift details: 5/5/2025

0 min ago

Add Shift

Shift 1 of 1

Job TUTORING	Clock in 09:31 am	Clock out 10:36 pm	Hours 13.08	EditDelete
Total sales \$0.00	Declared tips \$0.00	Source Manual		
Regular hours 13.08	Overtime hours 0.00	Premium hours 0.00		
Modified by sh185324@ncr.com	Punch edit reason Incorrect break out/in			

Edit shift details

4. Click the **three dots** at the right end of the shift details. The Edit and Delete icons appear.

5. Click **Edit** to make the necessary changes.

PUNCH SUMMARY / JERIN R

Jerin R

Add Shift

Shift details: 5/5/2025

0 min ago

Shift 1 of 1

* Indicates required fields

Job *

Clock in *

Clock out *

Hours

COOK

08:00 AM

05:10 PM

9.00

+ Add break period

Total sales

Declared tips

Punch edit reason *

\$ 0.00

\$

Incorrect break out/in

Cancel

Save

Edit shift details

You can edit the **Job**, **Clock in**, **Clock out**, **Declared tips** and **Punch edit reason** whereas the **Total sales** and **Hours** remain read only columns.

6. Click **Save** to save the shift details.

To delete 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/week** to edit the shift detail.

Punch summary

Add Shift

Schedule week: 4/30/2025 - 5/6/2025

0 min ago

Today 05/06/2025

Yesterday 05/05/2025

Filters

Density

Search...

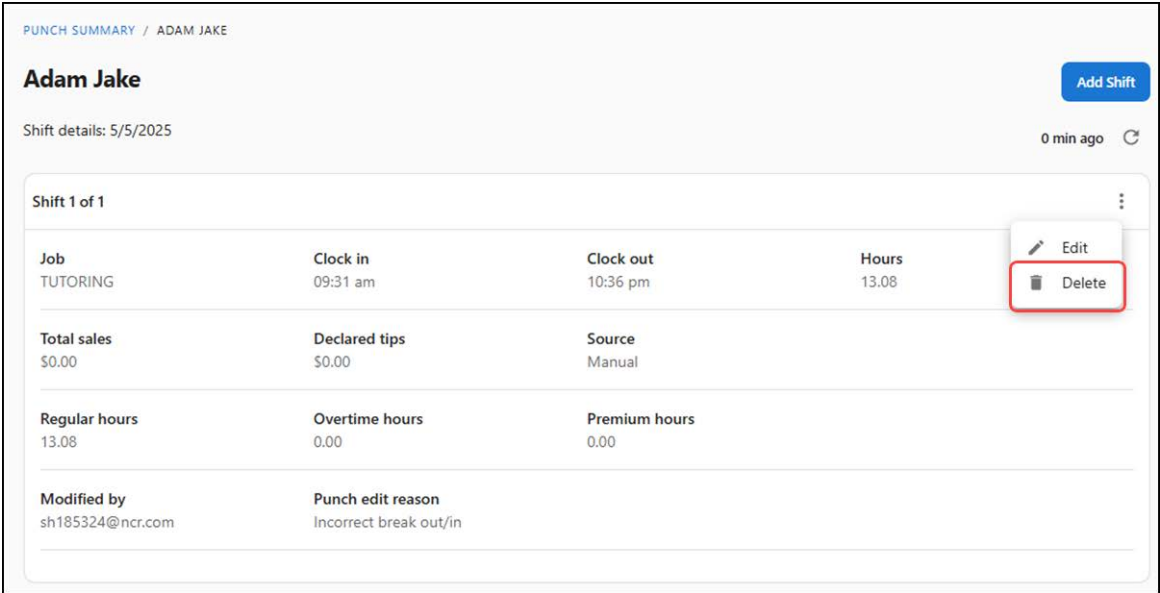
Employee ↑	Regular hours	Overtime hours	Premium hours	Break hours total
Adam Jake	13.08	0.00	0.00	0.00
Bono Popu	8.00	0.00	0.00	0.17
Jerin R	9.00	0.00	0.00	0.00

Rows per page: 10

1-3 of 3

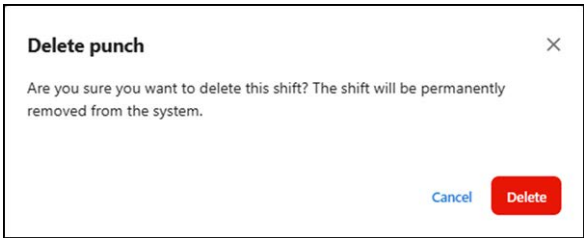
'Punch summary' screen

3. Select the **employee** for which to delete the shift details. The shift details screen of the employee appears.



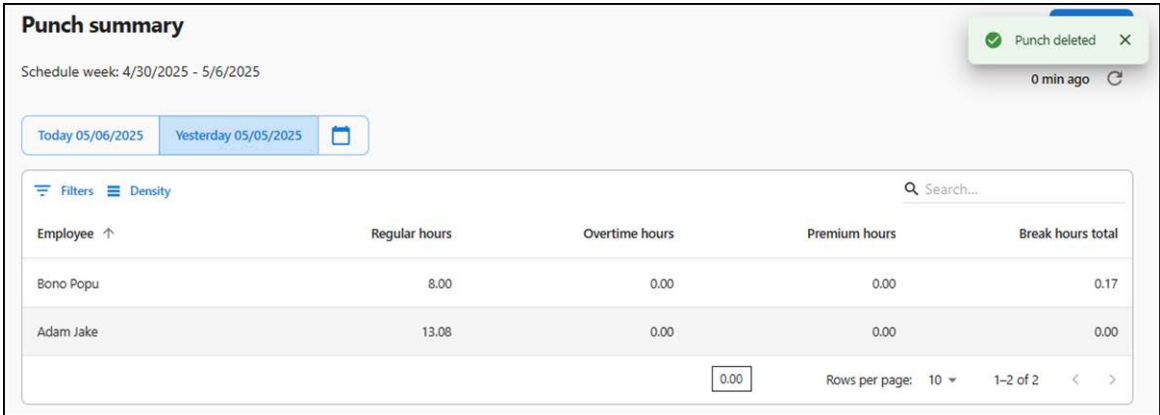
Delete shift details

4. Click the **three dot** icon next to the shift to delete and click **Delete**. A confirmation message to remove the shift from the employee appears.



Delete punch window

5. Click **Delete** to confirm.



Deleted punch message

The shift of the employee is removed, and a confirmation message appears on the page.

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 break](#)
- [Employee payroll](#)
- [Employee sales performance](#)
- [Generic payroll export](#)
- [Employee tip](#)
- [Interval sales and labor](#)

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 rolling 6-month 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 for the past six months, 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](#)

Columns
Filters
Density
Search...

Site	Name	Job type	Employee status	Hours worked	Hours remaining	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 (only scheduled weeks).
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.
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 over the past six months.

Approaching ACA threshold

All sites < 01/01/2025 - 01/07/2025 >

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	Average hours worked	Week of 1/1	Week of 12/25	Week of 12/18	Week of 12/11	Week of 12/4
578612 - SPR...	Jenna AC Em...	6.10	56.08	0.00	0.04	0.00	20.70
578612 - SPR...	Jack AC Empl...	5.66	72.89	0.00	0.00	0.00	0.00
578612 - SPR...	Rachel AC E...	4.27	3.02	0.00	0.00	0.00	33.19
578612 - SPR...	AC POS1	4.16	22.92	0.00	0.00	22.78	0.00
578612 - SPR...	Martha AC E...	3.80	0.00	0.00	0.06	0.00	15.01

'Employee average hours worked' view

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

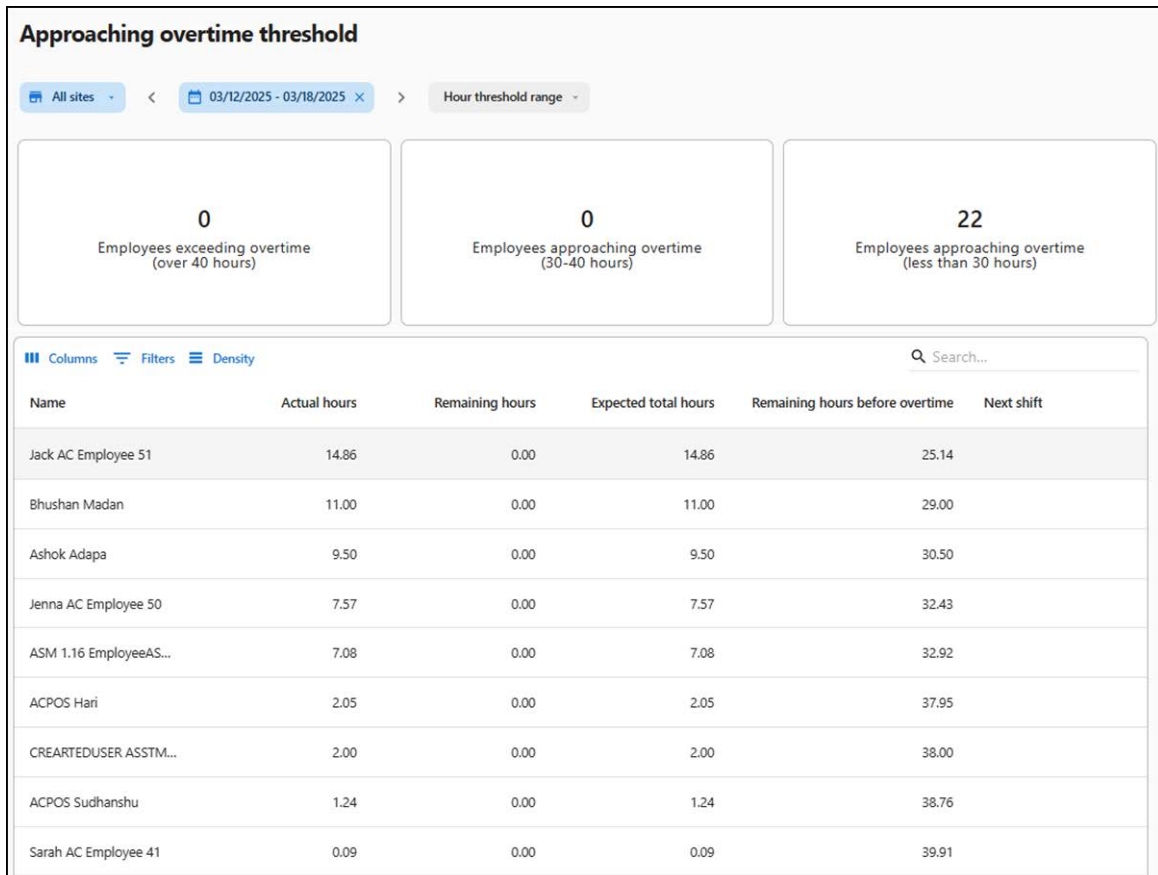
1. With the Approaching ACA threshold report open, select the **Employee average hours worked** tab.
2. Select the **site** from the drop-down.
3. Select the **date range** from the list given on the left side of the drop-down.

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.
Average hours worked	The average hours the employee worked per week during the selected date range.

Approaching overtime threshold

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



'Approaching overtime threshold' report

To run the 'Approaching overtime threshold' report:

1. Select **Labor > Reports > Approaching 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	Actual hours	Remaining hours	Expected total hours	Remaining hours before overtime	Next shift
Jack AC Employee 51	14.86	0.00	14.86	25.14	
Bhushan Madan	11.00	0.00	11.00	29.00	
Ashok Adapa	9.50	0.00	9.50	30.50	
Jenna AC Employee 50	7.57	0.00	7.57	32.43	
ASM 1.16 EmployeeASMChg1	7.08	0.00	7.08	32.92	
ACPOS Hari	2.05	0.00	2.05	37.95	
CREATEDUSER ASSTMANAG...	2.00	0.00	2.00	38.00	
ACPOS Sudhanshu	1.24	0.00	1.24	38.76	
Sarah AC Employee 41	0.09	0.00	0.09	39.91	
Manager User666	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.
Actual hours	The total of the employee’s punches for a week.
Remaining hours	The remaining hours the employee is scheduled to work.
Expected total hours	The total hours the employee is expected to work based on actual plus remaining.
Remaining hours before overtime	The difference between expected and 40 hours
Next shift	The next shift assigned to the employee.

Employee break

Use the 'Employee break' report to view the scheduled breaks of all employees for the day. The details include the length of a break, whether the break is paid or unpaid, and the start time of the break.

Employee break

All sites

01/02/2024 - 06/05/2025

0

Overdue breaks

0

Upcoming breaks (in the next hour)

ColumnsFiltersDensity

Search...

Date	Site	Name	Job	Scheduled clock in	Break type	Scheduled break
01/02/2025	578612 - SPRE QA[A...	Jack AC Employee 51	Cashier	10:00 AM	NA	NA
01/03/2025	578612 - SPRE QA[A...	Jacob Long	Assistant Manager	11:00 AM	NA	NA
01/06/2025	578612 - SPRE QA[A...	AC Employee One	Cashier	5:30 AM	NA	NA
01/06/2025	578612 - SPRE QA[A...	Harshavardhan Thota	Cashier	1:00 AM	Unpaid	1:15 AM

'Employee break' - Detailed view

To run the 'Employee break' report:

1. Select **Labor > Reports > Employee break**.
2. Select the **site(s)**.
3. Select the **date range**.

The data appears in two tiles as:

Overdue breaks — Total breaks that are overdue for the selected date range.

Upcoming breaks (in the next hour) — Total number of breaks due for the next hour.

Columns Filters Density							Search...
Date	Site	Name	Job	Scheduled clock in	Break type	Scheduled break	
01/02/2025	578612 - SPRE QA[ASM][...	Jack AC Employee 51	Cashier	10:00 AM	NA	NA	
01/03/2025	578612 - SPRE QA[ASM][...	Jacob Long	Assistant Manager	11:00 AM	NA	NA	
01/06/2025	578612 - SPRE QA[ASM][...	AC Employee One	Cashier	5:30 AM	NA	NA	
01/06/2025	578612 - SPRE QA[ASM][...	Harshavardhan Thota	Cashier	1:00 AM	Unpaid	1:15 AM	
01/07/2025	578612 - SPRE QA[ASM][...	AC Employee One	Cashier	5:30 AM	NA	NA	
01/08/2025	578612 - SPRE QA[ASM][...	AC Employee One	Cashier	7:00 AM	NA	NA	
01/08/2025	578612 - SPRE QA[ASM][...	Jack AC Employee 51	Cashier	8:00 AM	NA	NA	
01/10/2025	578612 - SPRE QA[ASM][...	Jack AC Employee 51	Cashier	5:00 AM	Paid	10:00 AM	
01/10/2025	578612 - SPRE QA[ASM][...	Jenna AC Employee 50	Cashier	9:00 AM	NA	NA	
01/10/2025	578612 - SPRE QA[ASM][...	Martha AC Employee 30	Cashier	2:00 PM	Paid	5:30 PM	
Rows per page: 10 1-10 of 296							

‘Employee break’ tabular report

The following information appears in the report:

Column	Description
Date	The date for which the report is generated.
Site	The site for which the report is generated.
Name	The name of the employee.
Job	The job under which the employee is scheduled to work.
Scheduled clock in	The time when the employee is scheduled to start their shift.
Break type	The type of break scheduled.
Scheduled break	The time when employee is scheduled to take a break.

Employee payroll

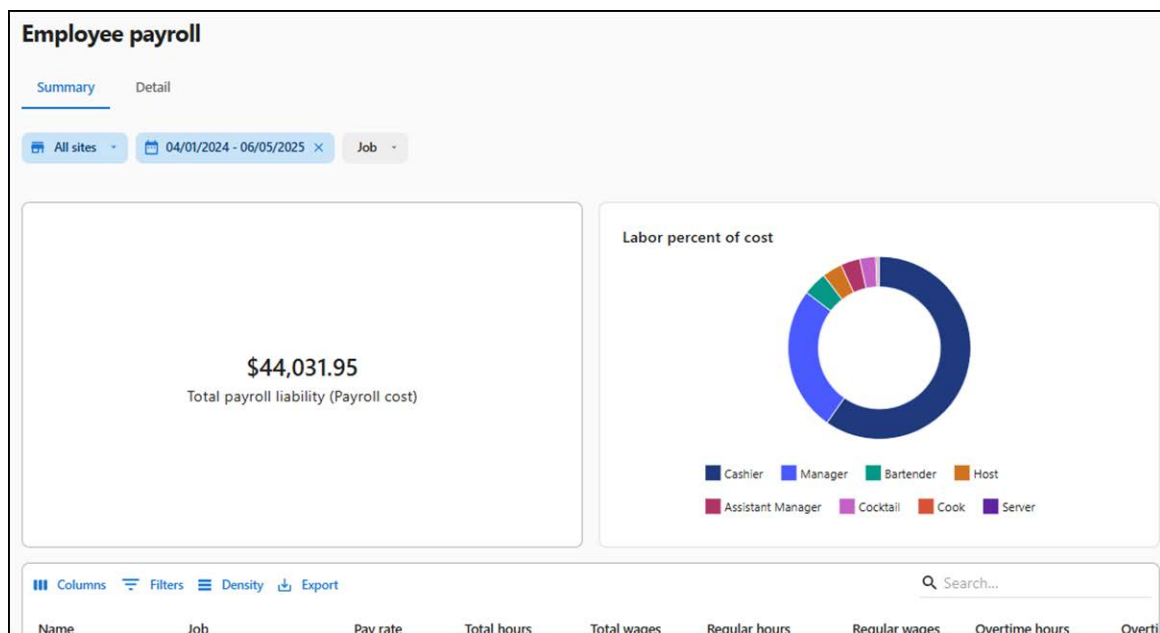
Use the 'Employee payroll' report to view employee payroll information for a selected pay period. The summary section of the report displays the hours and dollars by job, and any overtime or penalty pay earned by the employee. The detail section of the report displays information for individual punches. 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 restaurant or to all of the employees 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.

ColumnsFiltersDensityExport Search...								
Name	Job		Total hours	Total wages	Regular hours	Regular wages	Overtime hours	Overt
	Manager	\$20.00	94.67	\$1,893.36	94.67	\$1,893.36	0.00	
AC Assistant Mana...	Assistant Manager	\$17.75	72.55	\$1,287.78	72.55	\$1,287.78	0.00	
AC Employee 2	Cashier	\$9.50	11.00	\$99.75	10.50	\$99.75	0.00	
AC Employee One	Cashier	\$10.75	63.91	\$687.06	63.91	\$687.06	0.00	
AC Manager	Manager	\$26.75	89.31	\$2,389.12	89.31	\$2,389.12	0.00	
AC POS1	Cashier	\$14.00	24.87	\$348.16	24.87	\$348.16	0.00	
AC POS1	Cashier	\$20.00	7.00	\$140.00	7.00	\$140.00	0.00	
AC POS1	Manager	\$20.00	152.34	\$3,046.79	152.34	\$3,046.79	0.00	
AC POS1	Manager	\$20.00	152.34	\$3,046.79	152.34	\$3,046.79	0.00	
ACPOS Hari	Manager	\$9.00	32.05	\$288.44	32.05	\$288.44	0.00	

‘Employee payroll’ report

The following information appears in the report:

Column	Description
Name	The name of the employee.
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.



Note

The Export option in the 'Employee payroll' report appears when the report is loaded with data. You can download the report in CSV format, and the file appears in the Downloads folder of your browser. The report generates based on the filters and search terms you apply. Both summary and detail views have the export option.

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).

Columns Filters Density Export Search...								
Name	Business date	Job	Pay rate	Clock in	Clock out	Break type	Total hours	Total wage
	2024-11-01	Manager	\$20.00	12:17 PM	10:57 AM		94.67	\$1,893.3
AC Assistant Mana...	2024-11-01	Assistant Manager	\$17.75	9:08 AM	9:41 AM		72.55	\$1,287.7
AC Employee 2	2024-10-21	Cashier	\$9.50	1:00 PM	7:00 PM		5.50	\$52.2
AC Employee 2	2024-10-21	Cashier	\$9.50	4:30 PM	5:00 PM	Unpaid	0.50	\$0.0
AC Employee 2	2024-10-22	Cashier	\$9.50	9:00 AM	2:00 PM		4.50	\$42.7
AC Employee 2	2024-10-22	Cashier	\$9.50	11:00 AM	11:30 AM	Paid	0.50	\$4.7
AC Employee One	2024-10-19	Cashier	\$10.75	6:00 AM	11:30 PM		17.50	\$188.1
AC Employee One	2024-10-20	Cashier	\$10.75	6:00 AM	11:00 PM		17.00	\$182.7
AC Employee One	2024-10-21	Cashier	\$10.75	7:30 AM	3:30 PM		8.00	\$86.0
AC Employee One	2024-10-29	Cashier	\$10.75	7:49 PM	7:50 PM		0.01	\$0.1

‘Employee payroll’ report - Detail view

The following information appears in the report:

Column	Description
Name	Name of the employee.
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.

Column	Description
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.

Employee sales performance

Use the 'Employee sales performance' report to compare various performance measures across employees. You can compare per-person average (PPA), average check time, comps, voids, and several other measures. This helps identify the best performing employees, the under-performing employees, and the site performing to productivity expectations.

Employee sales performance

All sites 05/01/2024 - 06/04/2025 Job Day part

\$6.87
Average sales per labor hour

\$0.00
Per person average

3.95
Average check time minutes

Name	Job	Day part	Per person average	Total net sales	Number of guests	Number of checks	Average
AC Assistant Mana...	Assistant Manager	Breakfast	\$0.00	\$0.00	0	0	
AC Employee 2	Cashier	Breakfast, Lunch, L...	\$0.00	\$0.00	0	0	
AC Employee One	Cashier	Dinner, Breakfast, ...	\$0.00	\$0.00	0	0	
AC Manager	Manager	Breakfast, Breakfas...	\$0.00	\$0.00	0	0	
AC POS1	Manager	Breakfast, Dinner, ...	\$0.00	\$0.00	0	0	
AC POS1	Cashier	Breakfast, Lunch	\$0.00	\$1.08	0	1	
AC POS1	Manager	Lunch, Breakfast, L...	\$0.00	\$0.00	0	0	
AC POS1	Cashier	Dinner, Lunch, Bre...	\$0.00	\$0.00	0	0	
AC POS1	Manager	Late Night, Dinner...	\$0.00	\$16.00	0	2	

Rows per page: 10 1-10 of 88

'Employee sales performance' report

To run the 'Employee sales performance' report:

1. Select **Labor > Reports > Employee sales performance**.
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.
5. Select the **day part** from the drop-down.

The following details appear in tiles:

Average sales per labor hour — Total net sales for the selected period divided by the total labor hours.

Per person average — Total net sales for the selected period divided by the total number of guests.

Average check time minutes — Total check time divided by total number of checks.

The following information appears in the report:

Column	Description
Name	Name of the employee.
Job	The job under which the employee worked during the shift.
Day part	Part of the day like breakfast, lunch, dinner and more.
Per person average	Total sales divided by number of guests.
Total net sales	The net sales after required exemption.
Number of guests	Total number of guests.
Number of checks	Total number of checks in the given time.
Average check time minutes	The average check time.
Comp amount	Total amount of comps for the employee.
Void amount	Total amount of voids for the employee.
Sales per labor hour	Total sales divided by number of hours worked.

Generic payroll export

Use the 'Generic payroll export' to upload payroll information to a payroll processor or to simply analyze in a spreadsheet. The detailed information about each punch includes job, pay rate, hours worked, sales, and any overtime or penalty pay earned during the shift.

Generic payroll export							
All sites		06/04/2024 - 06/05/2025					
Columns	Filters	Density	Export	Search...			
Name	Job	Pay rate	Total net sales	Regular hours	Overtime hours	Premium hours	Declared
	Manager	\$20.00	\$0.00	94.67	0.00	0.00	\$0
AC Assistant Man...	Assistant...	\$17.75	\$0.00	72.55	0.00	0.00	\$0
AC Employee 2	Cashier	\$9.50	\$0.00	10.50	0.00	0.00	\$0
AC Employee One	Cashier	\$10.75	\$0.00	63.91	0.00	0.00	\$905,06
AC Manager	Manager	\$26.75	\$0.00	89.31	0.00	0.00	\$4
AC POS1	Manager	\$20.00	\$0.00	152.34	0.00	0.00	\$0
AC POS1	Cashier	\$20.00	\$1.08	7.00	0.00	0.00	\$9
AC POS1	Manager	\$20.00	\$16.00	152.34	0.00	0.00	\$0
AC POS1	Cashier	\$14.00	\$1.08	24.87	0.00	0.00	\$9

'Generic payroll export' report

To run the 'Generic payroll export' report:

1. Select **Labor > Reports > Generic payroll export**.
2. Select the **site(s)**.
3. Select the **date range**.



Note

The available date range options are **Payroll period**, and **Last payroll period**. The payroll period for the site depends on the frequency set in the Payroll calendar screen.

The following information appears in the report:

Column	Description
Name	The name of the employee.
Job	The job under which the employee worked during the shift.
Pay rate	The pay rate for the job of an employee.

Column	Description
Total net sales	The sum of net sales.
Regular hours	The hours the employee is planned to work for the shift.
Overtime hours	The overtime hours the employee worked.
Premium hours	The number of premium hours worked.
Declared tips	The total amount of tips declared
Tip percent	The percentage of tips amount.

Generic payroll export

All sites 04/05/2024 - 06/06/2025

Columns Filters Density **Export** Search...

Name	Job		Total net sales	Regular hours	Overtime hours	Premium hours	Declared
	Manager	\$20.00	\$0.00	94.67	0.00	0.00	\$
AC Assistant Man...	Assistant...	\$17.75	\$0.00	72.55	0.00	0.00	\$
AC Employee 2	Cashier	\$9.50	\$0.00	10.50	0.00	0.00	\$
AC Employee One	Cashier	\$10.75	\$0.00	63.91	0.00	0.00	\$905,06
AC Manager	Manager	\$26.75	\$0.00	89.31	0.00	0.00	\$4
AC POS1	Cashier	\$20.00	\$1.08	7.00	0.00	0.00	\$9
AC POS1	Cashier	\$14.00	\$1.08	24.87	0.00	0.00	\$9
AC POS1	Manager	\$20.00	\$16.00	152.34	0.00	0.00	\$
AC POS1	Manaoer	\$20.00	\$0.00	152.34	0.00	0.00	\$

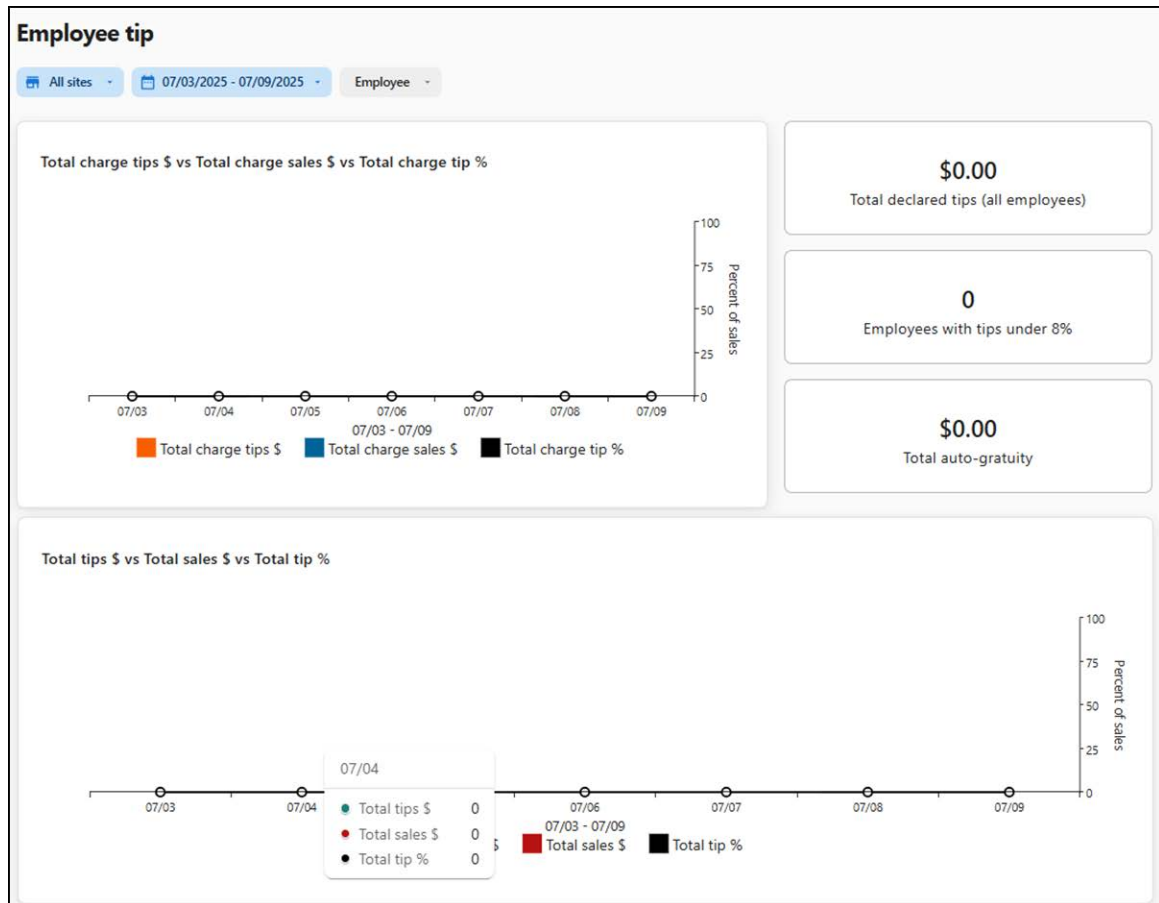
'Generic payroll report' - Export option

Note

The Export option in the 'Generic payroll export' report appears when the report is loaded with data. You can download the report in CSV format, and the file appears in the Downloads folder of your browser. The report generates based on the filters and search terms you apply.

Employee tip

Restaurants provide their guests with the opportunity to tip the service staff for a job well done. The POS tip data is available in BSL so that ASM can provide managers and third-party solutions the data for reporting, tip pooling, tip editing, cash management, tip distribution, and Payroll processes.



Employee tip report

To run the 'Employee tip' report:

1. Select **Labor > Reports > Employee tip**. The 'Employee tip' report for the previous day appears by default.
2. Select a **site** to report from the drop-down list.
3. Select a **date range** to report from the drop-down list.
4. Select the **Employee** from the drop-down list.

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

Total charge tips \$vs Total charge sales \$vs Total charge tip% — Displays data as a line graph on the axes showing the percent of sales along with days/months/years, based on the date range selection. Hover over the line graph to show the total amount of tips, total amount of sales and the percentage of total tips received through credit card based on the selected date range.

Total tips \$vs Total sales \$vs Total tip% — Displays data as a line graph on the axes showing the percent of sales along with days/months/years, based on the date range selection. Hover over the line graph to show the total amount of tips, total amount of sales and the percentage of total tips paid through cash based on the selected date range.

Total declared tips (all employees) — Displays the total amount of declared tips of all the employees.

Employees with tips under 8% — Displays the total number of employee with tips under 8%.

Total auto-gratuity — Displays the total amount of automatic gratuity applied to checks.

Columns Filters Density Export Search...							
Name	Total sales	Total declared tips	Tip % of sales	Charge sales	Charge tips	Charge tip % of sales	Sales with auto-gratu
	\$305.23	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00
	\$25,445.03	\$0.00	0.00%	\$1,054.79	\$86.00	8.15%	\$0.00
	\$1,499.02	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00
	\$34,172.05	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00
	\$7,742.21	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00
	\$5,873.58	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00
	\$3,071.97	\$0.00	0.00%	\$260.87	\$8.13	3.12%	\$0.00
	\$1,524.92	\$0.00	0.00%	\$344.11	\$6.90	2.01%	\$0.00
	\$1,524.92	\$0.00	0.00%	\$344.11	\$6.90	2.01%	\$0.00
	\$3,656.65	\$0.00	0.00%	\$2,322.88	\$570.30	24.55%	\$0.00
	\$390.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%	\$0.00
Total	\$25,260,798.26	\$3,720.65	0.01%	\$26,096.00	\$4,277.23	16.39%	\$866.00

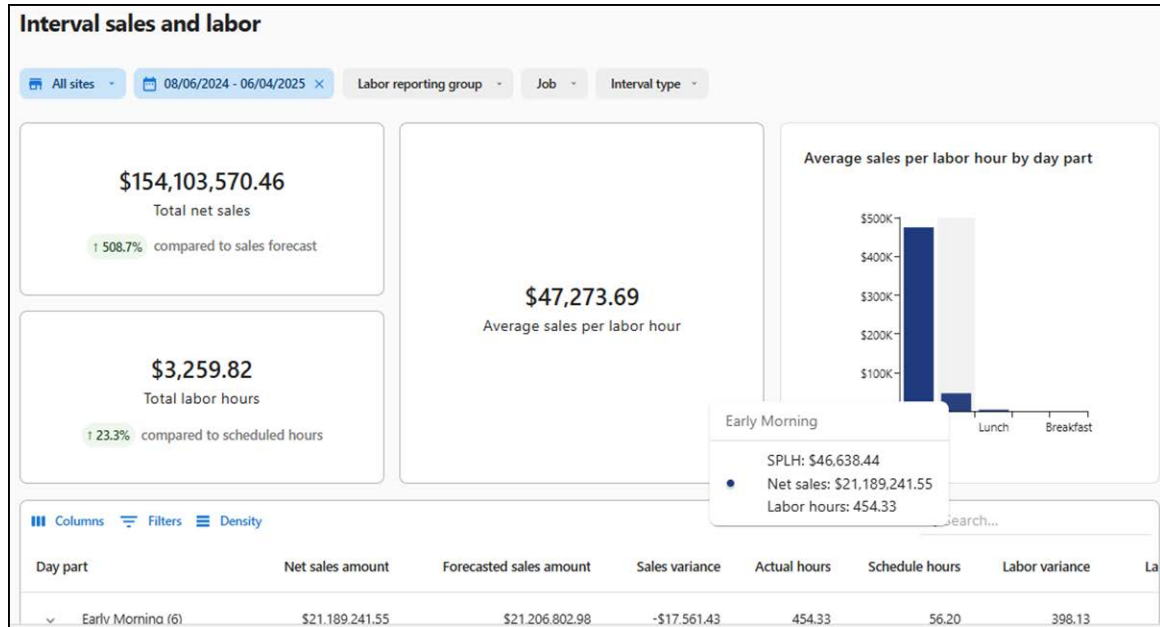
'Employee tip report' details

The data in the table appears with the following information:

Column	Description
Name	The name of the employee.
Total sales	Total sales amount on which the tip amount is calculated. Tip: Total sales - Total sales from checks with auto gratuity applied.
Total declared tips	Total tips declared in a directly tipped job.
Tip % of sales	Tip percentage for the employee. Tip % of sales = Total Declared Tips amount / Total Sales amount.
Charge sales	Total sales from checks tendered with a tender charge.
Charge tips	Charge tips from checks tendered with a charge tender.
Charge tip% of sales	Displays the charge tip percentage for the employee. Charge tip% of sales = Charge Tip amount / Charge Sales amount.
Sales with auto-gratuity	Total sales including auto-gratuities.
Non-charge sales	Total sales excluding charge tip sales.
Non-charge tips	Total declared tips excluding charge tip.
Non-charge tips%	Displays the percentage of non-charge tip in relation to Total Sales. Non-charge tips% = Non-Charge Sales /Total Sales.
Auto-gratuity amount	Total gratuity applied to checks.

Interval sales and labor

Use the 'Interval sales and labor' report to analyze the sales and labor data in detail. The report provides details such as net sales, forecasted sales, actual hours, scheduled hours, labor cost in dollars, percentage of sales, sales per labor hour, number of guests, and number of checks. The manager can view this in increments of 15, 30, and 60 minutes.



'Interval sales and labor' report

To run the 'Interval sales and labor' report:

1. Select **Labor > Reports > Interval sales and labor**.
2. Select the **site**.
3. Select a **date range** from the pre-defined date ranges that appear when you select the date.
4. Select or clear the **Labor reporting group**.
5. Select the **job**.
6. Select the **Interval type**.

The following data appears in four tiles:

Total net sales — Sum of total net sales generated.

Total labor hours — Number of labor hours spent. Additionally, the comparison (in percent) between the total number of labor hours and scheduled labor hours appears.

Average sales per labor hour — Average of sales for each labor hour.

Average sales per labor hour by day part — Average of sales for each labor hour by each day part. Hover over the values to view the SPLH amount, net sales amount, and labor hours spent. ASM collects data for the actual worked hours and wages by type, to calculate the hours and wages and provide the LRE (Labor Rules Engine) in the shift response.

Day part	Net sales amount	Forecasted sales amount	Sales variance	Actual hours	Schedule hours	Labor variance	Labor cost amount	Labor%
Early Morning (6)	\$21,189,241.55	\$21,206,802.98	-\$17,561.43	454.33	56.20	398.13	\$8,171.07	0.00
12:00 AM	\$6,045.12	\$6,674.94	-\$629.82	71.95	0.75	71.20	\$1,272.23	21.00
1:00 AM	\$16,736.82	\$12,004.13	\$4,732.68	75.76	9.25	66.51	\$1,302.76	7.00
2:00 AM	\$21,019,595.40	\$21,023,978.32	-\$4,382.92	75.60	8.75	66.85	\$1,384.16	0.00
3:00 AM	\$31,467.64	\$45,261.40	-\$13,793.76	71.65	6.00	65.65	\$1,307.27	4.00
4:00 AM	\$81,110.57	\$90,739.28	-\$9,628.71	72.83	6.50	66.33	\$1,341.17	1.00
5:00 AM	\$34,286.00	\$28,144.90	\$6,141.09	86.55	24.95	61.60	\$1,563.48	4.00
Breakfast (5)	\$131,618.81	\$126,920.89	\$2,697.92	863.24	760.47	102.77	\$13,083.20	9.00
6:00 AM	\$7,755.64	\$16,680.57	-\$8,924.93	122.33	84.00	38.33	\$1,951.78	25.00
7:00 AM	\$30,727.80	\$18,939.52	\$11,788.29	134.53	105.25	29.28	\$2,101.68	6.00
8:00 AM	\$21,478.14	\$23,293.81	-\$1,815.68	191.25	176.00	15.25	\$2,889.61	15.00

'Interval sales and labor' report

The following data appears in tabular form:

Column	Description
Day part	The defined day part during which the transactions occurred.
Net sales amount	The net sales after deducting discounts, price overrides, returns, and inclusive taxes.
Forecasted sales amount	The number of sales expected prior to the original sale.
Sales variance	The difference between expected sales and original sales.
Actual hours	Actual hours of labor worked.
Schedule hours	Original scheduled hours of work.
Labor variance	The difference between original and actual labor hours.
Labor cost amount	The total cost for labor hours worked.
Labor%	The percentage of labor hours and the amount calculated.
Sales per labor hour	The sum of sales calculated in one labor hour.
# of guests	Total number of guests.
# of checks	Total number of guest checks.

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.

The key areas of the Inventory module are:

- [Working with raw items](#)
- [Working with vendors](#)
- [Working with invoices](#)
- [Viewing invoice history report](#)

See Also:

- [Appendix A: Bulk importing vendors and vendor items](#)
- [Appendix B: Uploading an invoice](#)

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

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.

Create item

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

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

'Create raw item' screen

- 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.
- 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.
- Type a **name** for the raw item. This is a required option.
- 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

Category Group	Category ID	Category Name
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

Item ...	Item name	Vendor	Active	Container	Pack	Size	Unit	Price
☒	1234 Item 1234	Vendor 1234	✓	Case (cs)	1	1	Ounce...	1
☐	20000 v1.2 item	v1.2 Vendor	✓	Case (cs)	1	2	Quart ...	5
☐	41 Lettuce Romain Hea...	V1.11 Smoke	✓	Pound (lb)	2	2	Pound...	0
☐	85 Yogurt Vanilla Greek	V1.11 Smoke	✓	Pint (pt)	3	2	Ounce...	0
☐	617 Tomato	V1.11 Smoke	✓	Bag (bg)	3	4	Pound...	0
☐	SM Te... SMT	V1.11 Smoke	✓	Bag (bg)	10	5	Fluid ...	\$49
☐	T.2 Coffee	V1.11 Smoke	✗	Bag (bg)	11	66	Millilit...	9999.99
☐	1 Cakes	V1.11 Smoke	✓	Case (cs)	4	3	Pound...	99999

Current selection: 1 item selected
Item 1234

Cancel Save

Assign vendor items to raw items

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



Reference

Refer to [page 103](#) for instructions on using the 'Assign vendor items to raw item' feature.

- 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.

Raw items

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

Create item

Filters Density

Search Name

Raw item name ↑	Category	Active	Inactive as of	Actions
1206_STG	5110 - Meat	✓		⋮
123	5110 - Meat	✓	2/18/2025	⋮
123New Item	5150 - Bakery	✓		⋮
345n	5110 - Meat	✓	2/18/2	⋮
Bakery	5130 - Poultry	✓		⋮
Beer - Light	5410 - Bottle beer	✓		⋮
Cherry Coke - 12 oz	5210 - Beverage cost- non-alcoholic beverages	✓		⋮

Edit

Deactivate

Delete

Edit a raw item

- 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.

The screenshot shows the 'General information' screen for a raw item named 'apple'. The breadcrumb trail at the top is 'RAW ITEMS / APPLE'. The 'General information' tab is selected. The status is 'Active', with a red arrow pointing to it and a red box around the 'Edit' button. A note indicates the last edit was by 'acct:commerce@00ubrzsifax9tpom1d7-ncr.asm.qe+stg-yp-admin@gmail.com' on 3/2/2024. There is a 'Deactivate on' date field. The 'Raw item name' is 'apple' and the 'Category' is '5140 - Produce'. At the bottom, there is a 'Vendor items' section with a table header showing columns: 'Ite...', 'Item na...', 'Vendor', 'Ac...', 'Cont...', 'Pack', 'Size', 'Unit', and 'Price'. The table also has controls for 'Filters', 'Density', 'Export', and a search bar.

'General information' screen

- Click **Save**. A success message appears and automatically dismisses. The raw item is updated with the modifications.
- Click **RAW ITEMS** at the top of the screen to return to the 'Raw items' screen.

To deactivate a raw item:

Note

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

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

Raw items

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

Create item

Filters Density

Search Name

Raw item name ↑	Category	Active	Inactive as of	Actions
1206_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	✓		⋮

Edit

Deactivate

Delete

Deactivate raw items

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

Deactivate raw item

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.

Deactivate on

07/25/2024

MM/DD/YYYY

Cancel

Deactivate

'Deactivate raw item' confirmation message

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

To delete a raw item:



Note

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

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

Raw items

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

Create item

Filters

Density

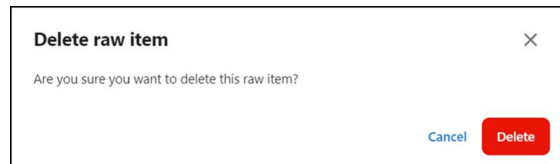
Export

Search Name

Raw item name ↑	Category	Active	Inactive as of	Actions
00006b06-1ce7-4768-855e-f293a3e1...	5100 - Total food cost	×	10/4/2023	⋮
00012d5d-572f-484d-ab2b-ddfe5e1e...	5100 - Total food cost	×	10/7/2023	⋮
0001463f-07ce-4128-87a1-2f30d9580...	5100 - Total food cost	✓		⋮
0001e11b-dcf9-4ad7-8bd1-38650e27...	5100 - Total food cost	×	11/2/2023	⋮

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

Vendor name	Email	Phone	Active
bghjfhk			✓
Cherry Street Brewing	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 192](#).

To add a vendor manually:

1. Select **Inventory > Vendors**. The ‘Vendors’ screen appears.

Vendors

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

Add vendor

ColumnsFiltersDensity

Search Name

Vendor name	Email	Phone	Active
Atlanta Organic Produce	FarmerBrown@mail.com		✓
Cherry Street Brewing			✓
test	test@gmail.com		✓
Test_Sa_Regression testing			✓
Test_SG_Regression Testing			✓
Test-Vendor-7800	abc@test1.com		✗
Test-Vendor-7802	abc@test3.com		✗
Test-Vendor-7803	abc@test33.com	+91 095867 82369	✓
Test-Vendor-7804	abc@test4.com	+91 095867 82369	✓
Test-Vendor-7805	abc@test51.com	+1 (564) 574-6756	✓

Rows per page: 101-10 of 22

‘Vendors’ screen

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

'New vendor details' screen

3. Confirm **Active vendor** is toggled to the on position (default value). When toggled off, you cannot use the vendor.
4. Type the **name** of the vendor.
5. Type the **A/P Code** associated with the vendor. The accounts payable (AP) code is a six-character alphanumeric code attached to the vendor master records that allows you to post transactions to a general ledger account.
6. Select the **country** where the vendor is located from the drop-down list.
7. Type the **address** of the vendor in '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 100](#).

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.

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 103](#).

For information on using a .CSV file to upload vendor items in bulk, refer to [page 196](#).

To manually add a vendor item:

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

Cherry Street Brewing details

General Information Catalog

(* Indicates required fields) Last edit was 9/26/2024 by acctcommerce@00ubwzn87f7kqhexp1d7-ncr.asm.qe+stg-admin@gmail.com

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

Item code	Name / Description *	Purchase unit *	Receive unit *	Price *	Raw Item	GL account	Active	Actions
2000	Irish Red, 12 oz	PT=12 oz	Ounce (oz)	\$3.50	Bhavanesh Test RawItem	5160 - Dairy	Active	

Rows per page: 10 1-1 of 1

[Back](#)

'Catalog' tab

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

Cherry Street Brewing details

General Information **Catalog**

(* Indicates required fields) Last edit was 9/26/2024 by acctcommerce@00ubwzn8f7kqheps1d7-nrc.asm.qe+stg-admin@gmail.com

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

Add vendor item

Item code	Name / Description *	Purchase unit *	Receive unit *	Price *	Raw Item	Actions
2000	Irish Red, 12 oz	PT=12 oz	Ounce (oz)	\$3.50	Bhavanesh Test R	

Rows per page: 10 1-1 of 1

Add item

* Indicates required fields

☒ Active

Item code

Name / Description *

Container *

Packs per case *

If there are no packs in the case, enter 1

Size * Unit *

Price *

\$

Raw Item

GL account

Save & close

Save & add another

'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).
- Type the **unit price** of the vendor item container. It must be a numeric value (up to two decimals).

10. 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.

11. Click **Save & close** to save the changes.

-OR-

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

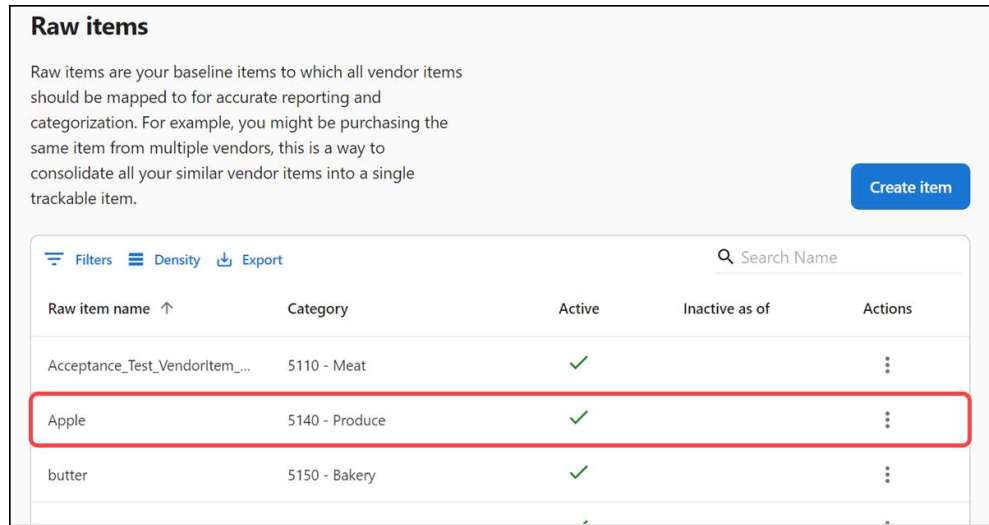
General Information		Catalog				
(* Indicates required fields)		Last edit was 7/26/2024 by acctcommerce@00uepuczdix5iwzt1d7-lm185162@ncr.com				
This is the vendor catalog section. In here, you can find all of the items associated to this vendor and you can add, edit, and deactivate/exclude items.		Add vendor item				
Filters Density Export		Search Name				
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:

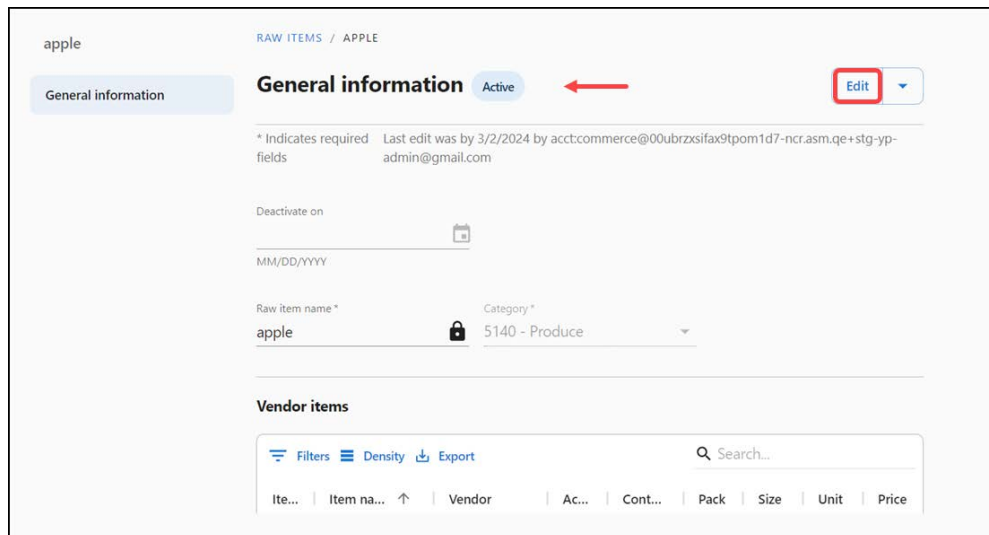
As an alternate method to working in the Vendors function, you can use the Raw Items function to associate a raw item with a vendor item. The vendor item must already exist.

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



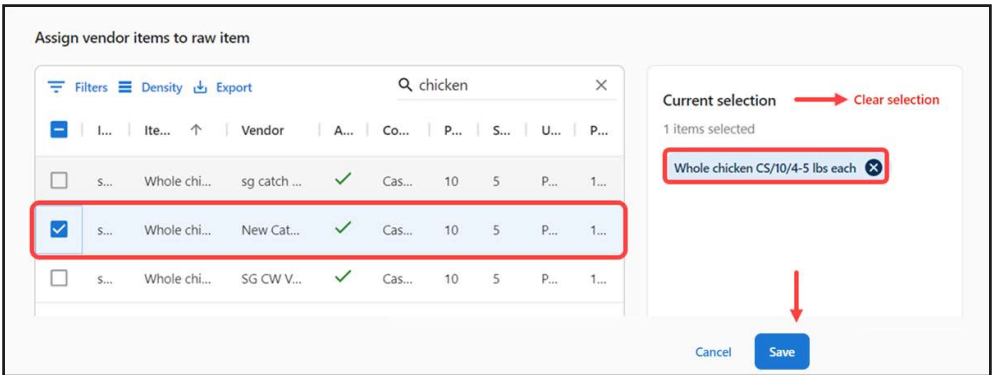
'Raw items' screen

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.

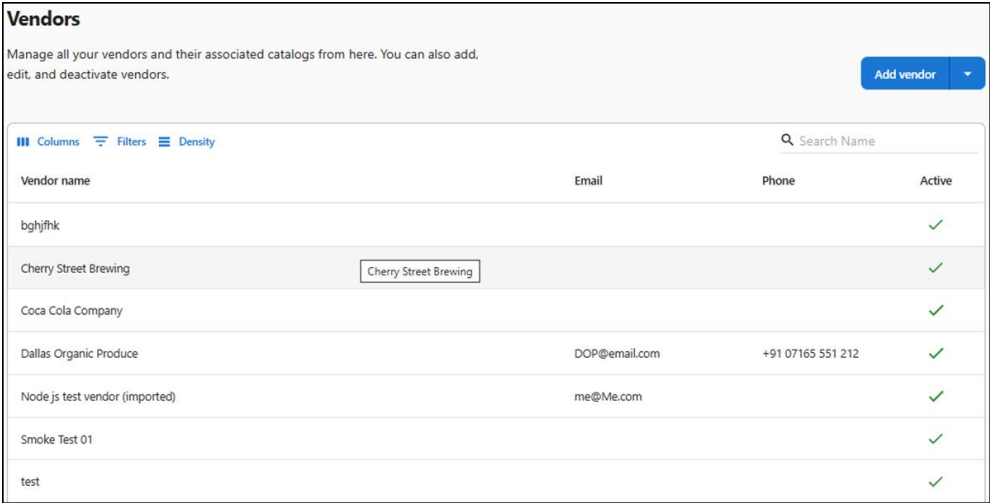


'Assign vendor items to raw item' group bar

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

To edit a vendor item:

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



Vendor selection

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

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*

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.

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

You have 10 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	GL account	Actions
100	SGTT item one	CS=100 oz	Ounce (oz)	\$0.00	345n	5110 - Meat	
700	SGTT item seven	CS=7/700 lb	Pound (lb)	\$0.00	Unassigned	Unassigned	
400	SGTT item four	CS=4/400 g	Gram (g)	\$0.00	Unassigned	Unassigned	Edit Deactivate

Back

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.

Coca Cola Company details

General Information

Catalog

(* Indicates required fields)

Last edit was 2/4/2025 by acctcommerce@00ubwzn877kqhexp1d7-ncr.asm.qe-stg-admin@gmail.com

⚠ You have 10 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 It	Actions
100	SGTT item one	CS=100 oz	Ounce (oz)	\$0.00	345n	⋮
700	SGTT item seven	CS=7/700 lb	Pound (lb)	\$0.00	Unass	⋮
400	SGTT item four	CS=4/400 g	Gram (g)	\$0.00	Unass	⋮

Close

SGTT item seven

(* Indicates required fields)

Active

Item code

700

Name / Description *

SGTT item seven

Container *

Case (cs)

Packs per case *

7

If there are no packs in the case, enter 1

Save & close

Save & add another

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.

Vendors

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

Add vendor

ColumnsFiltersDensity

Search Name

Vendor name	Email	Phone	Active
bghjfhk			✓
Cherry Street Brewing	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 *

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 to view a list of the vendor items.

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

⚠ You have 10 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	GL account	Actions
100	SGTT item one	CS=100 oz	Ounce (oz)	\$0.00	345n	5110 - Meat	⋮
700	SGTT item seven	CS=7/700 lb	Pound (lb)	\$0.00	Unassigned	Unassigned	⋮
400	SGTT item four	CS=4/400 g	Gram (g)	\$0.00	Unassigned	Unassigned	⋮

Edit

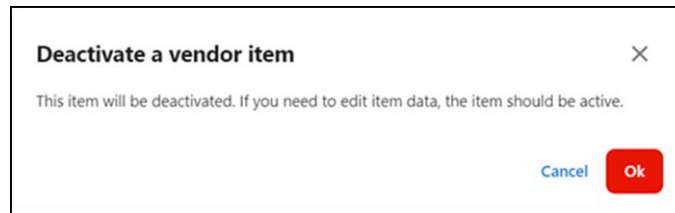
Deactivate

Back

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 109](#).
- Uploading a digital image of the invoice. If you upload a PDF, each PDF page is converted to an image file. See [page 203](#).

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

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 *

bghjfhk
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@00uepuczdioxSiwzt1d7-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

Invoice details Draft Delete invoice

* Indicates required fields Last edit was 7/26/2024 by acct:commerce@00uepuczdx5iwt1d7-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

Add item

Back Accept invoice

Option to add an item to the invoice

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

Invoice details Draft Delete invoice

* Indicates required fields Last edit was 7/26/2024 by acct:commerce@00uepuczdx5iwt1d7-lm185162@ncr.com

Invoice information

Invoice date * 07/26/2024 Invoice delivery date and t... 07/26/2024 03:2

Invoice ID * 8325 Invoice comments

Vendor information

Vendor name * 6572654367785

Add item

Back Accept invoice

Add item Close

* Indicates required fields

Item Service

Item code * 2007

Name / Description * Cheese Cake

Container * Dozen (dz)

Save & close

Save & add another

Option to enter item or service details

10. Click **Item** or **Service** to designate the **type of item** to add to the invoice. Choose from:
- Item** — Indicates the item is a product purchased from the vendor, such as egg or milk.
 - Service** — Indicates the item is for a service provided by the vendor, such as a catering service.
11. Type the **vendor item code**, up to 50 characters.
12. Type the **name and description of the item**, up to 250 characters.

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

Item / Service	Item code	Name / Description	Receive unit	Quantity	Price	Subtotal	Actions
Item	2007	Cheese Cake	Dozen=1/1 ea	10	\$2.00	\$20.00	

Subtotal \$20.00

Sales tax \$1.00

Amount payable \$21.00

[Back](#)
[Accept invoice](#)

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 sections for 'Invoice information' and 'Vendor information'. The 'Invoice information' section contains fields for 'Invoice date *' (07/26/2024), 'Invoice delivery date and time *' (07/26/2024 03:27 PM), 'Invoice ID *' (8325), and 'Invoice comments'. The 'Vendor information' section contains a field for 'Vendor name *' (6572654367785). At the top right, there are buttons for 'Delete invoice' and 'Edit'. At the bottom right, there are buttons for 'Back' and 'Finalize invoice' (highlighted in a red box). A note at the top indicates '* Indicates required fields' and 'Last edit was 7/26/2024 by acct:commerce@00uepuczdx5iwt1d7-lm185162@ncr.com'.

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 sections for 'Invoice information' and 'Vendor information'. The 'Invoice information' section contains fields for 'Invoice date *' (07/26/2024), 'Invoice delivery date and time *' (07/26/2024 03:27 PM), 'Invoice ID *' (8325), and 'Invoice comments'. The 'Vendor information' section contains a field for 'Vendor name *' (6572654367785). At the top right, there are buttons for 'Delete invoice' and 'Edit'. At the bottom right, there are buttons for 'Back' and 'Unfinalize invoice' (highlighted in a red box). A note at the top indicates '* Indicates required fields' and 'Last edit was 7/26/2024 by acct:commerce@00uepuczdx5iwt1d7-lm185162@ncr.com'.

Finalized invoice



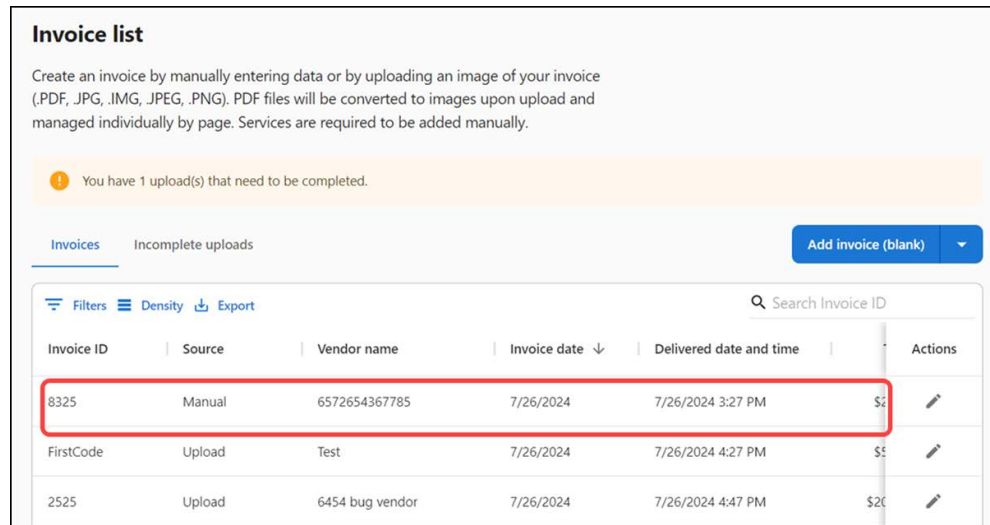
Note

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

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

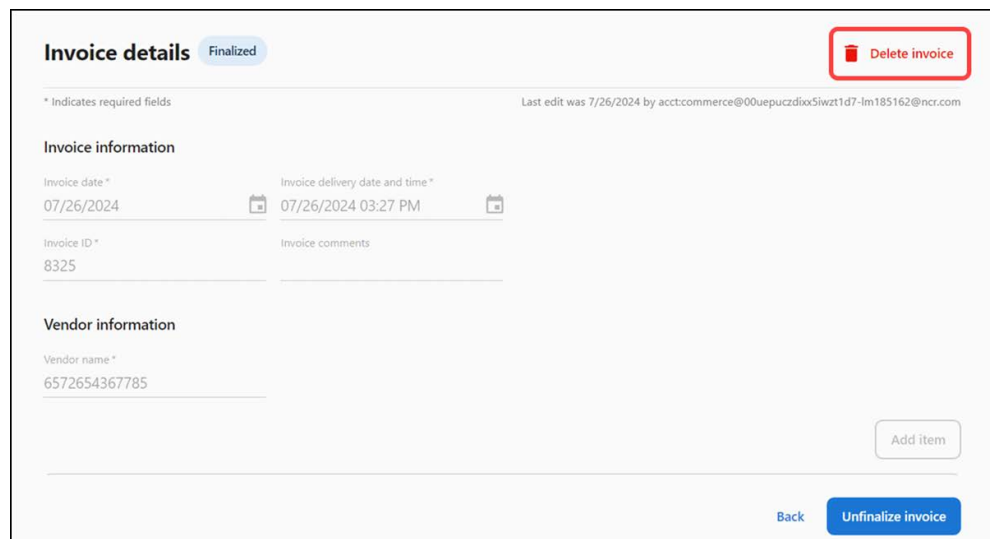
Deleting an invoice

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

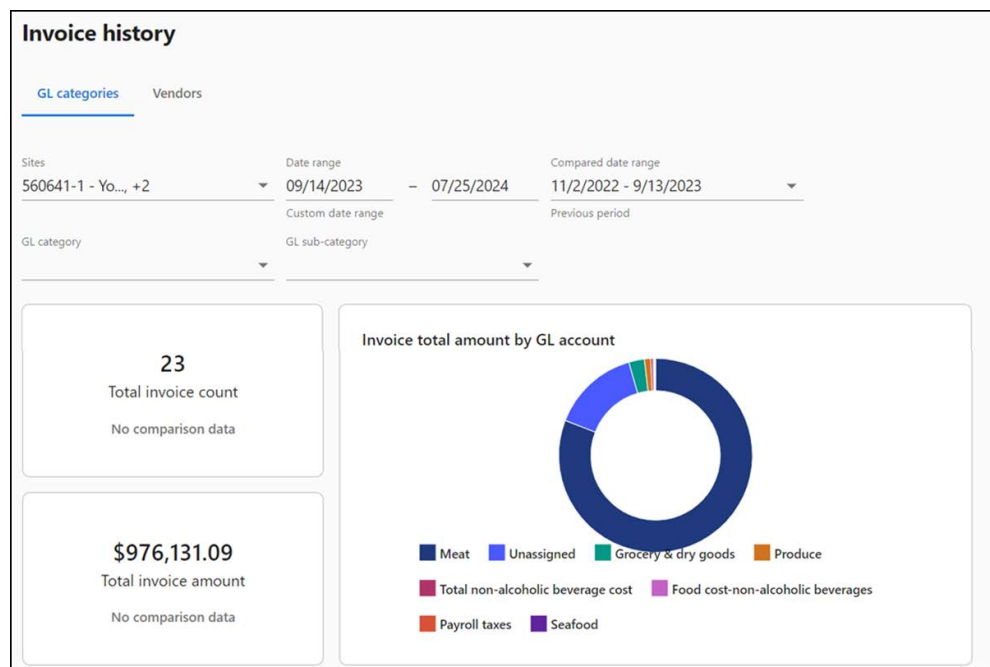
3. Click **Delete invoice**. A confirmation message appears allowing you to confirm the invoice deletion.
4. Click **Delete** to confirm.

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.

Filters Density Export Search...				
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

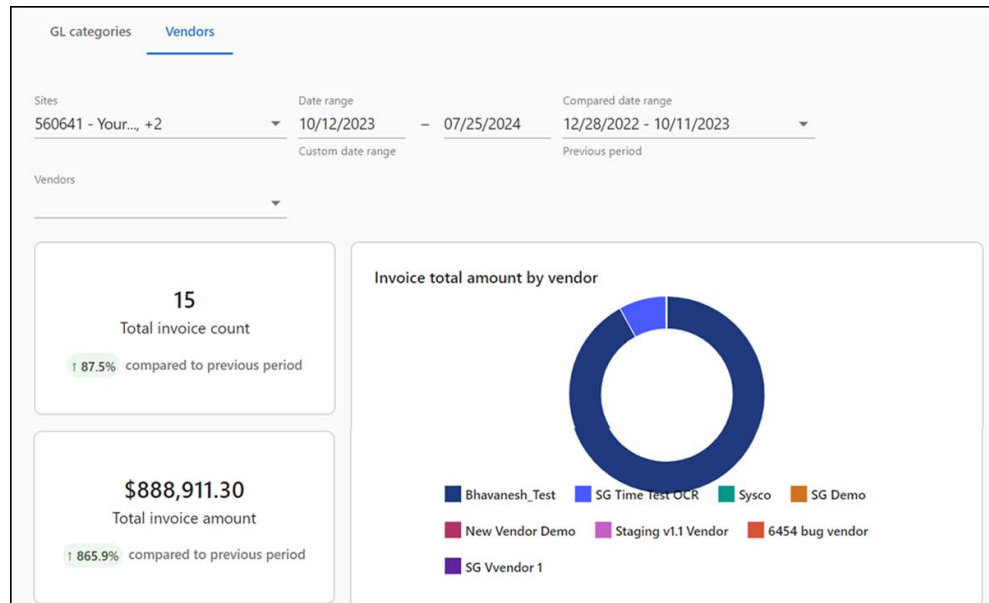
The following information appears in the report:

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.

Filters Density Export					Search...
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	

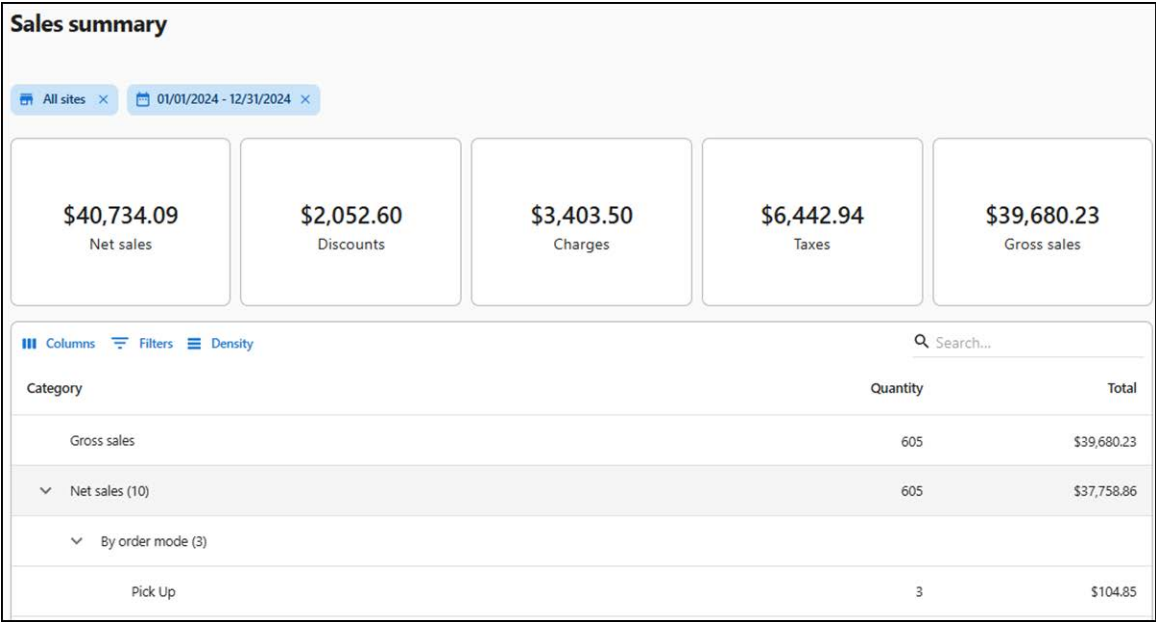
The following information appears in the report:

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).

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.

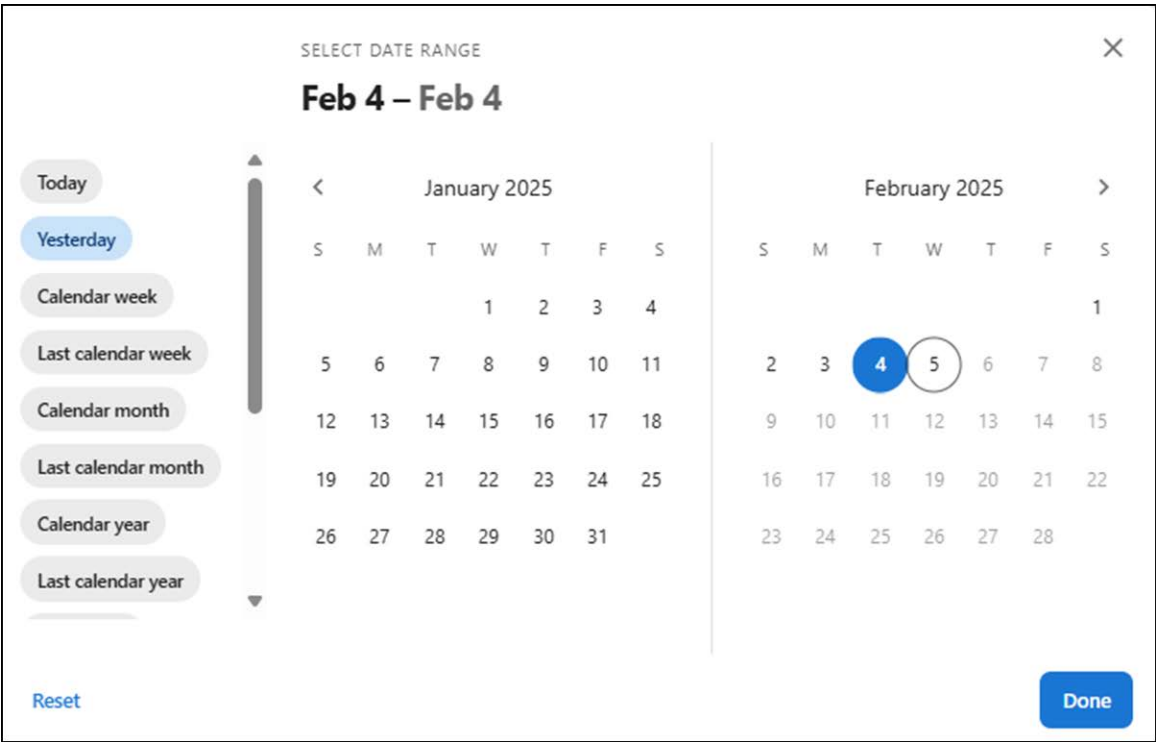
Each sales report defaults to the previous day.



‘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.

SELECT DATE RANGE

Jan 26 – Feb 1

Today

Yesterday

Calendar week

Last calendar week

Calendar month

Last calendar month

Calendar year

Last calendar year

Fiscal week

<

January 2025

>

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

<

February 2025

>

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

Reset

Done

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

All sites

01/01/2024 - 12/31/2024

\$40,734.09	\$2,052.60	\$3,403.50	\$6,442.94	\$39,680.23
Net sales	Discounts	Charges	Taxes	Gross sales

ColumnsFiltersDensity

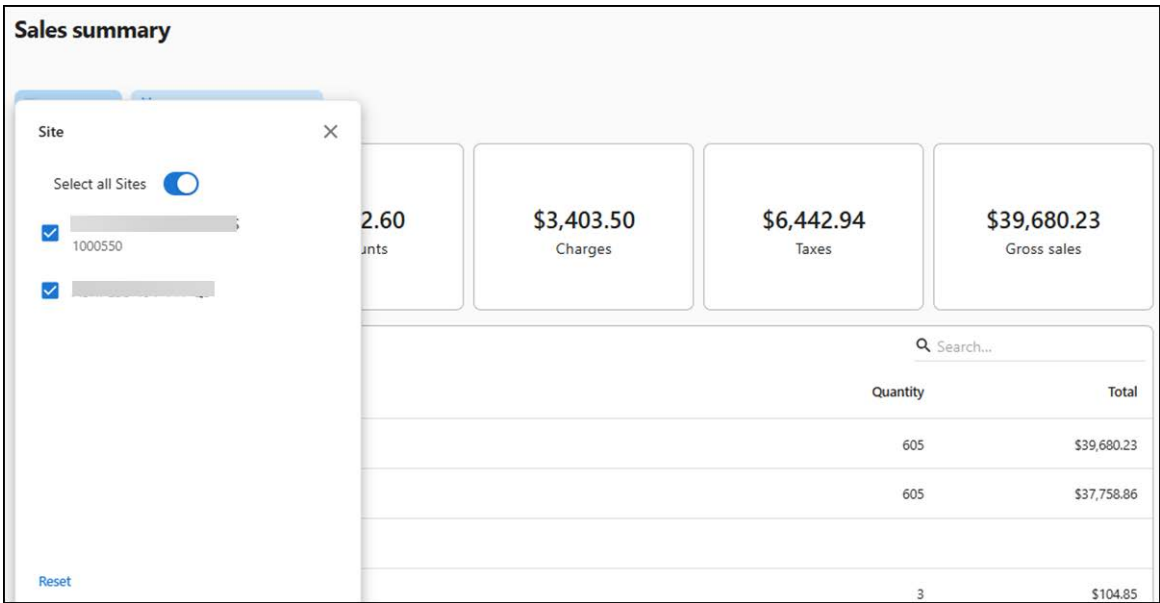
Search...

Category	Quantity	Total
Gross sales	605	\$39,680.23
Net sales (10)	605	\$37,758.86
By order mode (3)		
Pick Up	3	\$104.85

‘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.



'Sales summary' - Site options

2. Select a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select all Sites**.

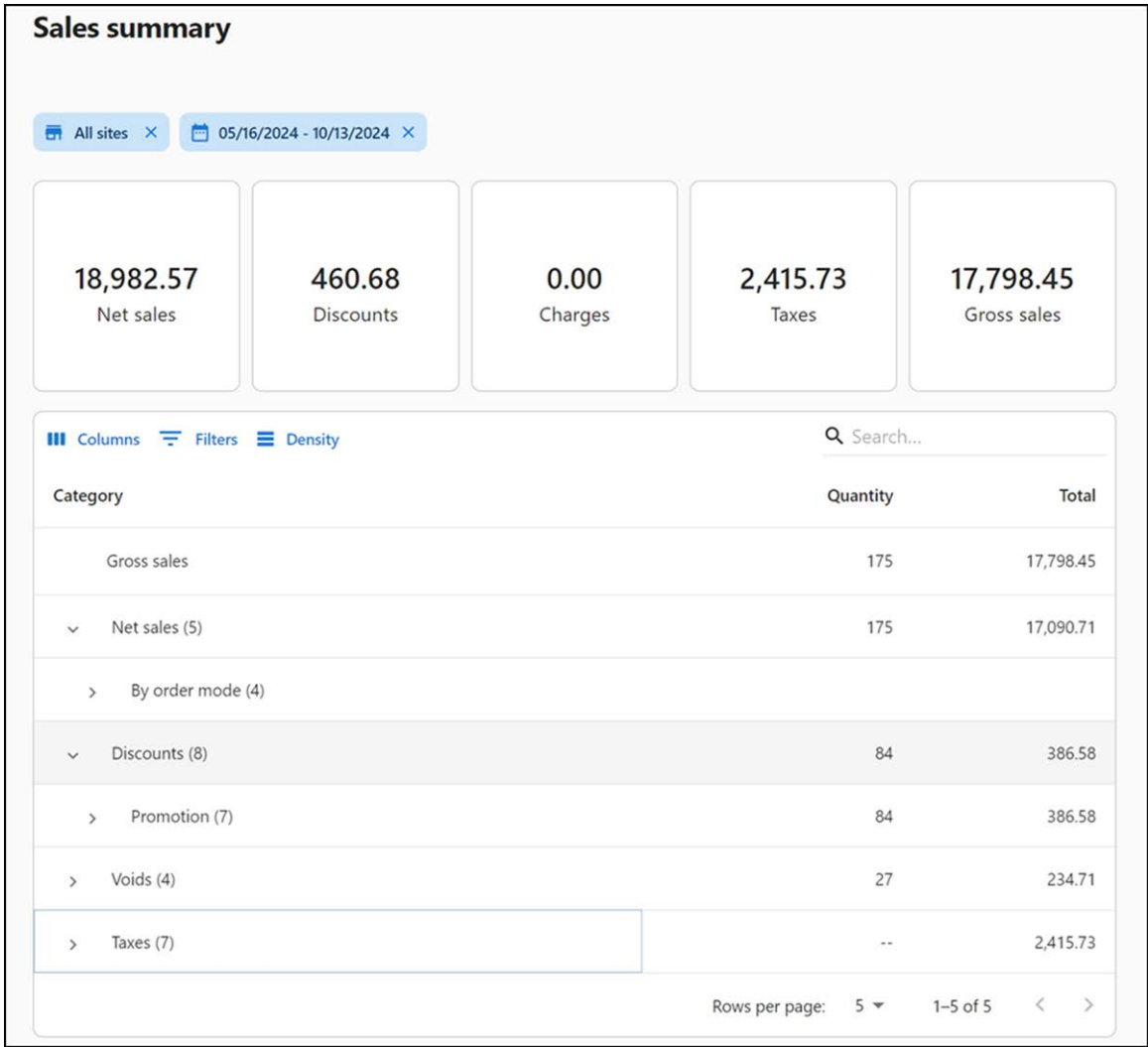


Note

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.

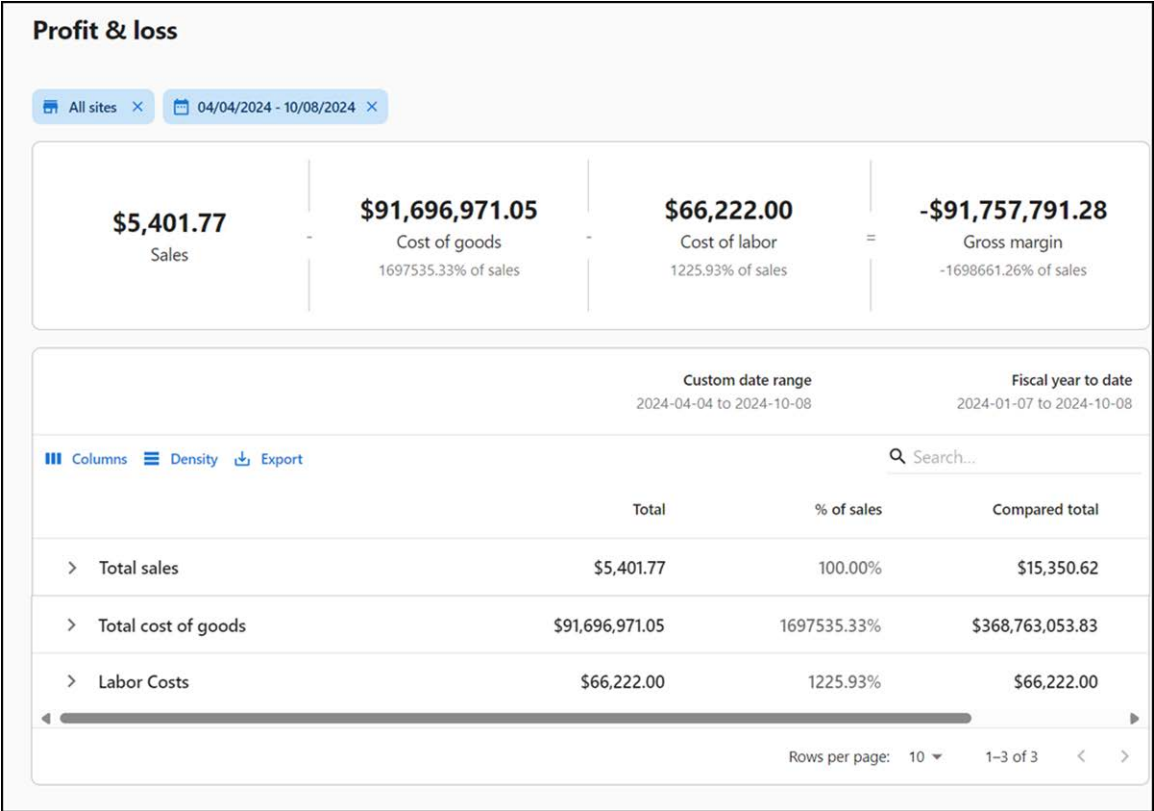
Gross Sales — Displays the total Gross Sales amount. Gross Sales are the Item Sales of non-voided 'Sales' items (includes Inclusive Taxes).

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.

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 **All sites** drop-down list to report. You can toggle the list to **Select 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
Columns Density Export		Search...	
	Total	% of sales	Compared total
☒ Total sales	-\$91.65	100.00%	\$0.00
Food sales	-\$32.63	35.60%	\$0.00
Beer sales	-\$59.02	64.40%	\$0.00
☒ Total cost of goods	\$397,591.26	-433814.79%	\$373,597.39
☒ Labor Costs	\$1,201.73	-1311.22%	\$1,201.73

Rows per page: 10 1-3 of 3

'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.

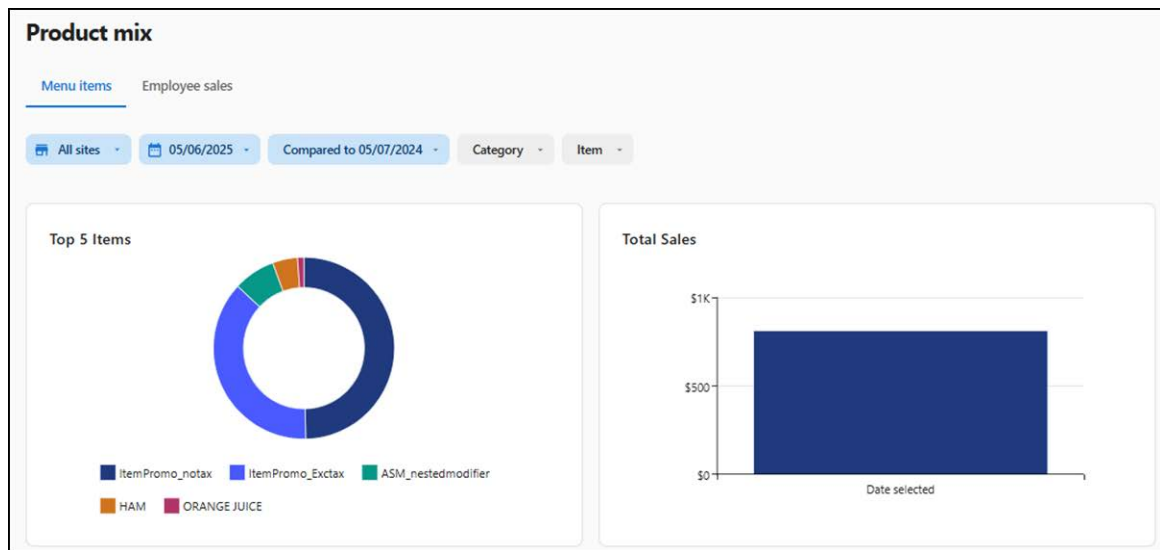
Reporting data appears on the following tiles:

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 166 .
Compared % of sales	Displays the percentage of sales compared to the fiscal year.

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.

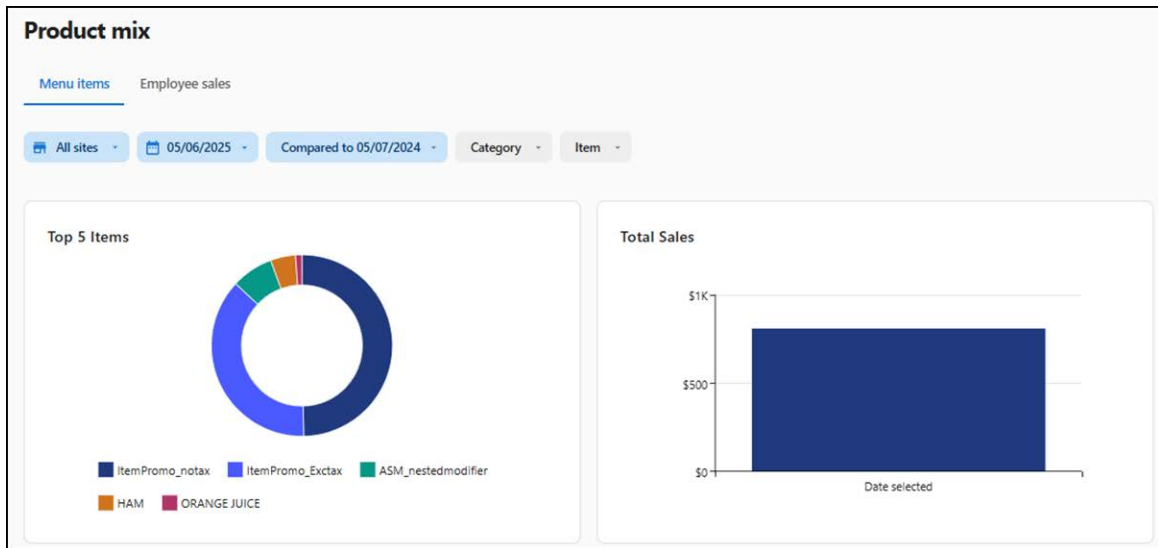


'Product mix' report - 'Menu items' view

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 a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select 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	Parent Item Quantity	Modifier Quantity	Item Sales	% of Category Sales	% of Total Sales
ASM PROMOTION (3)	7	0	\$760.00	100.00%	93.93%
ASM_nestedmodifier	2	0	\$60.00	7.89%	7.42%
ItemPromo_Exctax	3	0	\$300.00	39.47%	37.08%
ItemPromo_notax	2	0	\$400.00	52.63%	49.44%
BEVERAGES (1)	1	0	\$9.09	100.00%	1.12%
ORANGE JUICE	1	0	\$9.09	100.00%	1.12%
BRUNCH (1)	1	0	\$4.00	100.00%	0.49%
BRUNCH #1	1	0	\$4.00	100.00%	0.49%
SANDWICH (1)	3	0	\$36.00	100.00%	4.45%
HAM	3	0	\$36.00	100.00%	4.45%

'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.
Parent Item Quantity	Displays the quantity of the parent item used.
Modifier quantity	Displays the count of all the modifiers sold.
Item Sales	Displays the total amount of item sales.
% of Category Sales	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

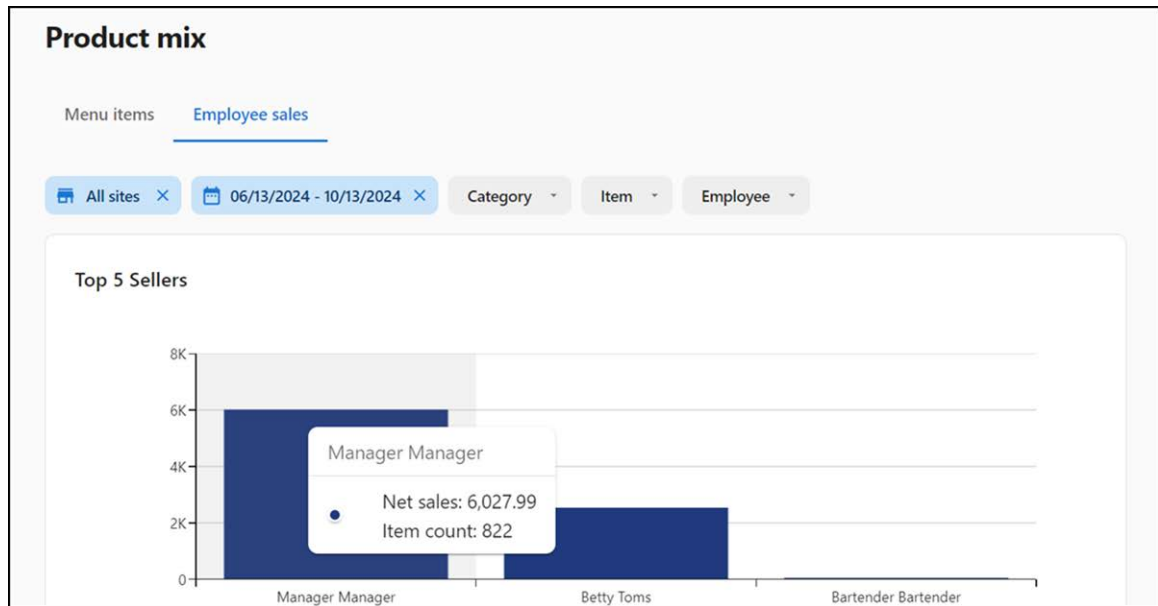
You can sort the items by clicking the pivot(>) next to each item of the first three columns. Clicking the pivot gives you detailed sales data of each item sold and also modifier data sold accordingly.

'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 a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select 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	Parent Item Quantity	Item Sales
▼ Hannah Fin (2)	2	\$24.00
> SANDWICH (1)	2	\$24.00
▼ Jenna AC Employee 50 (4)	2	\$21.09
> BEVERAGES (1)	1	\$9.09
> SANDWICH (1)	1	\$12.00
▼ Rachel AC Employee 60 (4)	5	\$460.00
> ASM PROMOTION (3)	5	\$460.00
▼ Sai Akash S (5)	3	\$304.00
> ASM PROMOTION (2)	2	\$300.00
> BRUNCH (1)	1	\$4.00

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

Product mix report - List modifiers

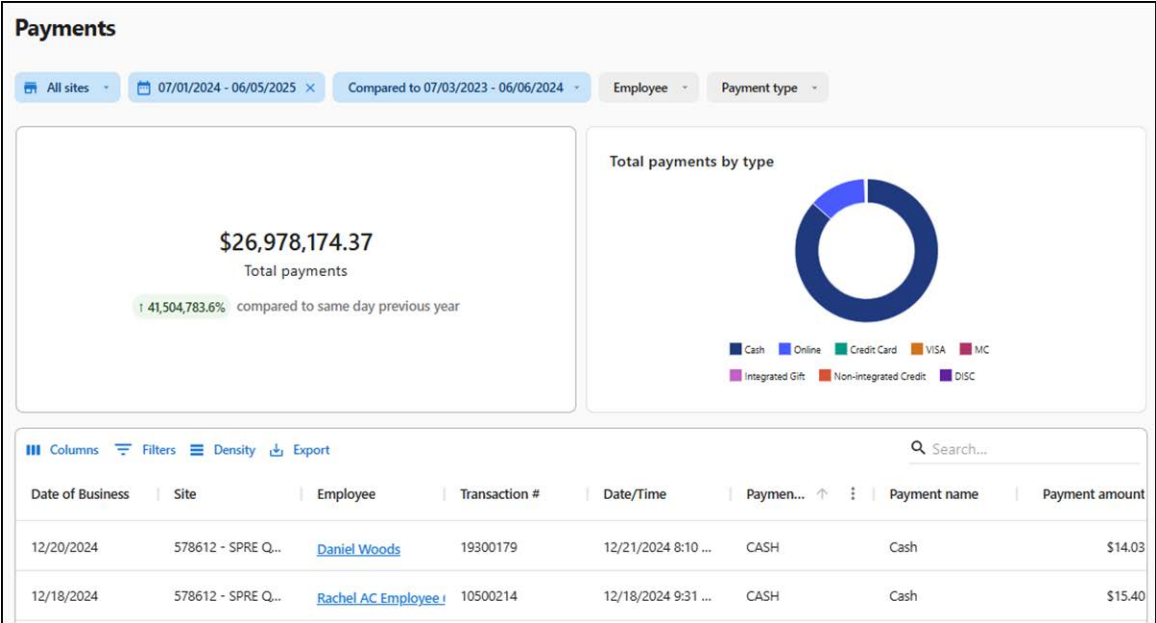
Column	Description
Category	Category of the item or a modifier.
Parent Item Quantity	Displays the quantity of parent item used.
Item sales	Displays the total amount of item sales.

To refine your search:

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

Payments

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

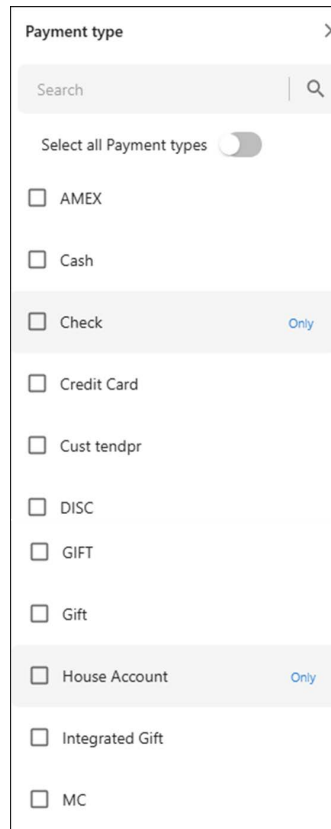


‘Payments’ report

To run the ‘Payments’ report:

1. Select **Sales > Report > Payments**. The ‘Payments’ report for the previous date appears by default.
2. Select a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select all Sites**.
3. Click **Reset** to reset the site selection.
4. Select a **date range** from the drop-down list.

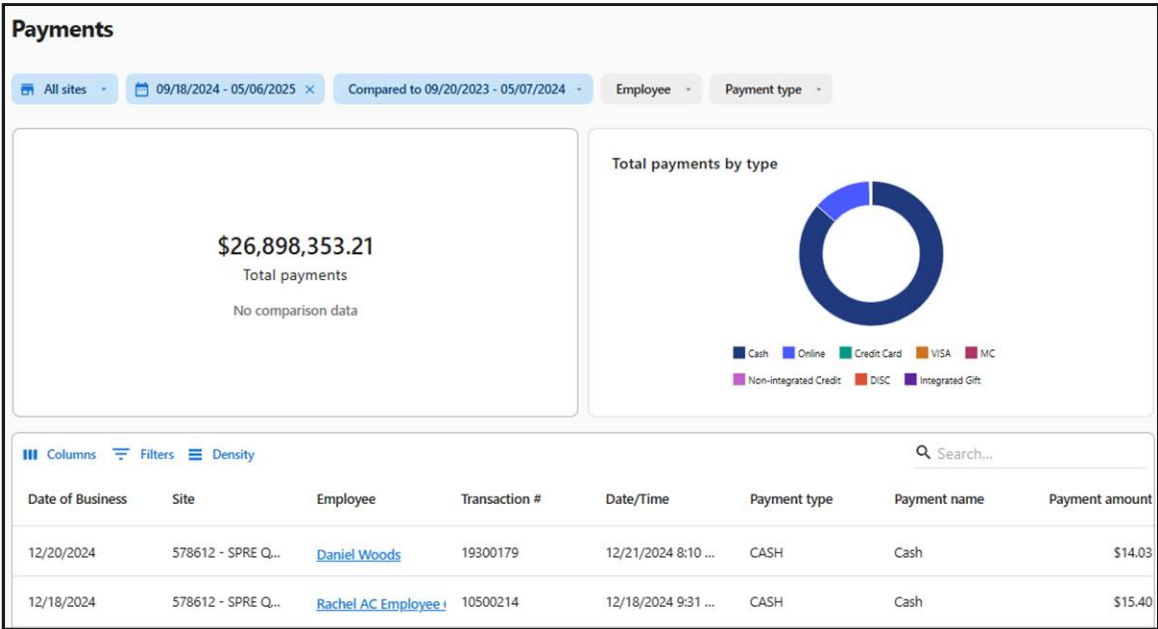
5. Select the **Employee** from the drop-down list.

A screenshot of a 'Payment type' selection modal. The modal has a title bar with a close button (X). Below the title bar is a search bar with the placeholder text 'Search' and a magnifying glass icon. Under the search bar is a toggle switch labeled 'Select all Payment types'. Below the toggle is a list of payment types, each with a checkbox: AMEX, Cash, Check, Credit Card, Cust tendpr, DISC, GIFT, Gift, House Account, Integrated Gift, and MC. The 'Check' and 'House Account' items are highlighted with a light blue background and have the word 'Only' in blue text to their right.

Payment type

6. To refine your search you can select multiple/all the **Payment type** 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.

Columns Filters Density Export Search...							
Date of Business	Site	Employee	Transaction #	Date/Time	Payment type	Payment name	Payment amount
12/20/2024	578612 - SPRE Q...	Daniel Woods	19300179	12/21/2024 8:10 ...	CASH	Cash	\$14.03
12/18/2024	578612 - SPRE Q...	Rachel AC Employee	10500214	12/18/2024 9:31 ...	CASH	Cash	\$15.40
12/18/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500212	12/18/2024 8:30 ...	CASH	Cash	\$63.25
12/18/2024	578612 - SPRE Q...	Michael AC Employee	10500223	12/18/2024 2:54 ...	CREDIT_CARD	Credit Card	\$284.80
12/18/2024	578612 - SPRE Q...	Martha AC Employee	10500221	12/18/2024 2:52 ...	CASH	Cash	\$187.00
12/18/2024	578612 - SPRE Q...	Sam AC Employee 40	10500219	12/18/2024 2:49 ...	CREDIT_CARD	Credit Card	\$110.50
12/18/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500217	12/18/2024 2:47 ...	CASH	Cash	\$8.25
12/17/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500208	12/17/2024 12:00...	CASH	Cash	\$7.70
12/17/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500207	12/17/2024 11:59...	CREDIT_CARD	Credit Card	\$127.50
12/17/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500206	12/17/2024 11:58...	CREDIT_CARD	Credit Card	\$55.25

'Payments' summary

The following information appears in the report:

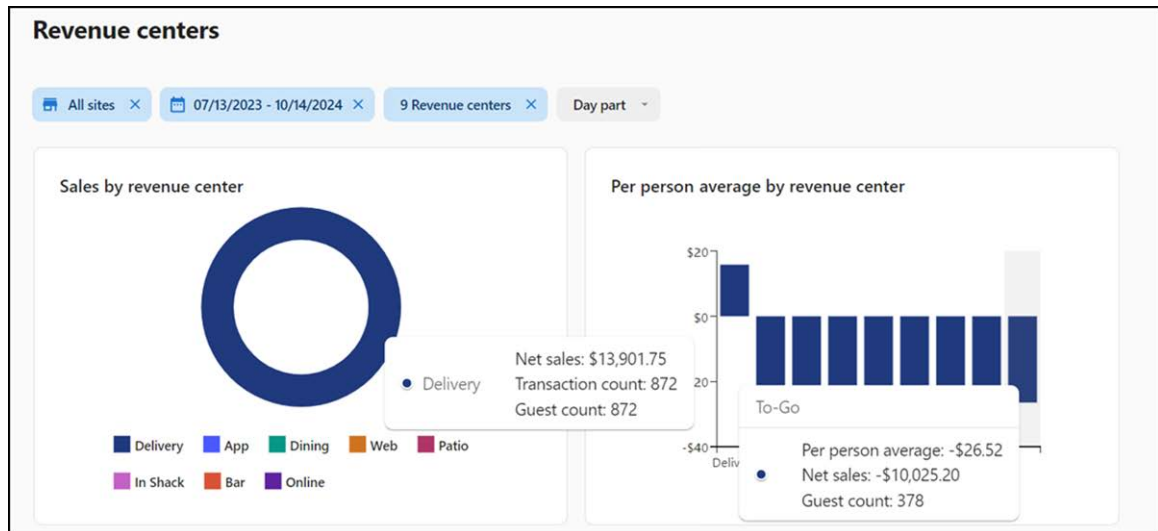
Column	Description
Date of Business	The date of transaction.
Site	Name of the site or store.
Employee	Name of the employee.
Transaction#	Transaction number for reference.
Date/Time	Date and time of the transaction.
Payment type	Type of payment made by cash, card etc.
Payment name	The type of payment applied to the transaction.
Payment amount	The amount of payment.
Tip amount	The amount paid as tip.

Note

The 'Export' option in the Payments report appears when the report is loaded with data. You can download the report in CSV format, and the file will appear in your browser's downloads folder. The report generates based on the filters and search terms you apply.

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 **All sites** drop-down list to report. You can toggle the list to **Select 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 **Day parts** 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.

Columns Filters Density Search...							
Site	Net sales	Tax amount	Discount amount	Other charges amount	Refunds	Gr...	Transaction cour
578612 - SPRE QA[ASM][E2ETe	\$24,157,41...	\$2,515,553....	\$102,037.79	\$15,548.00	\$13,763.76	\$24,276,56...	2,05
> - (6)	\$3,025,752....	\$416,021.24	\$768.33	\$14,240.00	\$13,763.76	\$3,042,509....	1,07
> 2024.12 (2)	\$1,660.66	\$91.02	\$82.00	\$0.00	\$0.00	\$1,769.25	1
> Dev1_revcenter (5)	\$32,748.92	\$1,255.88	\$159.75	\$100.00	\$0.00	\$33,066.72	17
> PAT (2)	\$340.25	\$34.02	\$0.00	\$0.00	\$0.00	\$340.25	
> Phase 2 Regression (6)	\$36,581.03	\$2,562.48	\$652.02	\$280.00	\$0.00	\$37,648.46	36
> Pulse App Testing (5)	\$21,034,90...	\$2,094,044....	\$100,190.97	\$627.00	\$0.00	\$21,135,12...	33
> Raj (2)	\$1,300.00	\$125.00	\$0.00	\$0.00	\$0.00	\$1,300.00	
> Rakesh N (1)	\$42.50	\$6.50	\$5.00	\$0.00	\$0.00	\$47.50	
> Revcaterin (1)	\$300.00	\$15.00	\$0.00	\$0.00	\$0.00	\$300.00	
> Revenue Center1 (1)	\$1,245.45	\$69.55	\$0.00	\$0.00	\$0.00	\$1,300.00	
> Revenue Center2 (1)	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$300.00	
> Test Rakesh Bar (2)	\$5,436.36	\$238.64	\$0.00	\$0.00	\$0.00	\$5,600.00	
> TestRC1 (1)	\$672.81	\$57.10	\$2.00	\$0.00	\$0.00	\$700.00	
> Testing Rakesh (4)	\$12,904.24	\$922.10	\$177.72	\$301.00	\$0.00	\$13,329.34	5
> Update RC 1 (1)	\$24.00	\$5.30	\$0.00	\$0.00	\$0.00	\$24.00	
> rev_cat (2)	\$900.00	\$15.00	\$0.00	\$0.00	\$0.00	\$900.00	
> revadd (1)	\$2,300.00	\$90.00	\$0.00	\$0.00	\$0.00	\$2,300.00	

'Revenue centers' report view

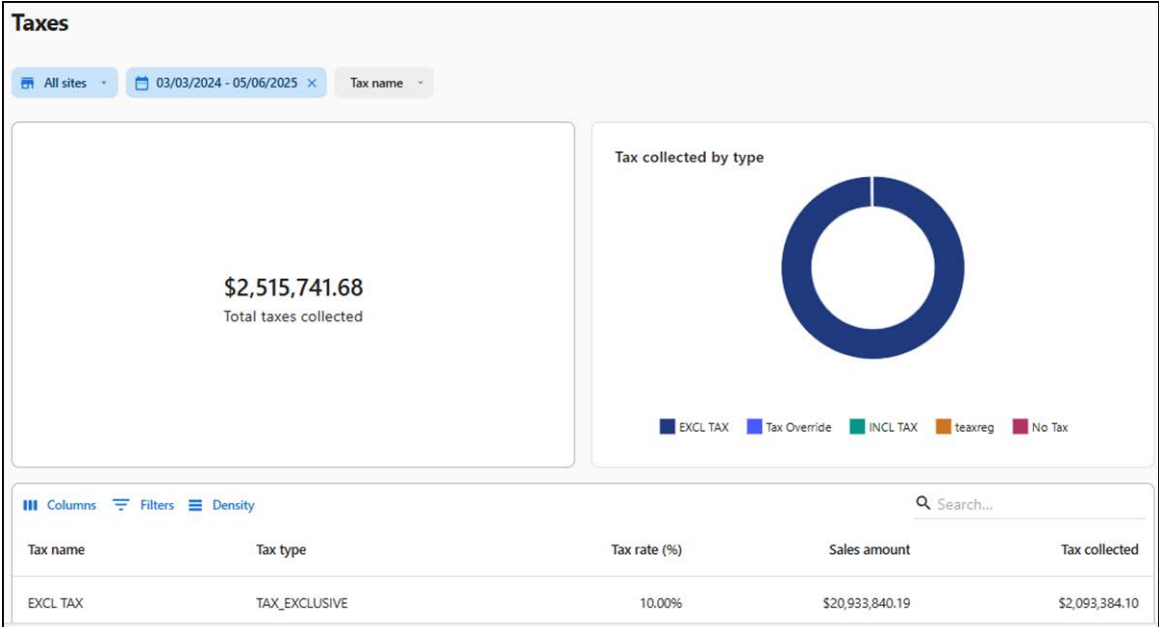
The following information appears in the report:

Column	Description
Site	Name of the site or store.

Column	Description
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.
Refunds	Refund of the tax amount.
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.
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.

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 **All sites** drop-down list to report. You can toggle the list to **Select 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.

Columns Filters Density Search...				
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
Rows per page: 5 1-5 of 7 < >				

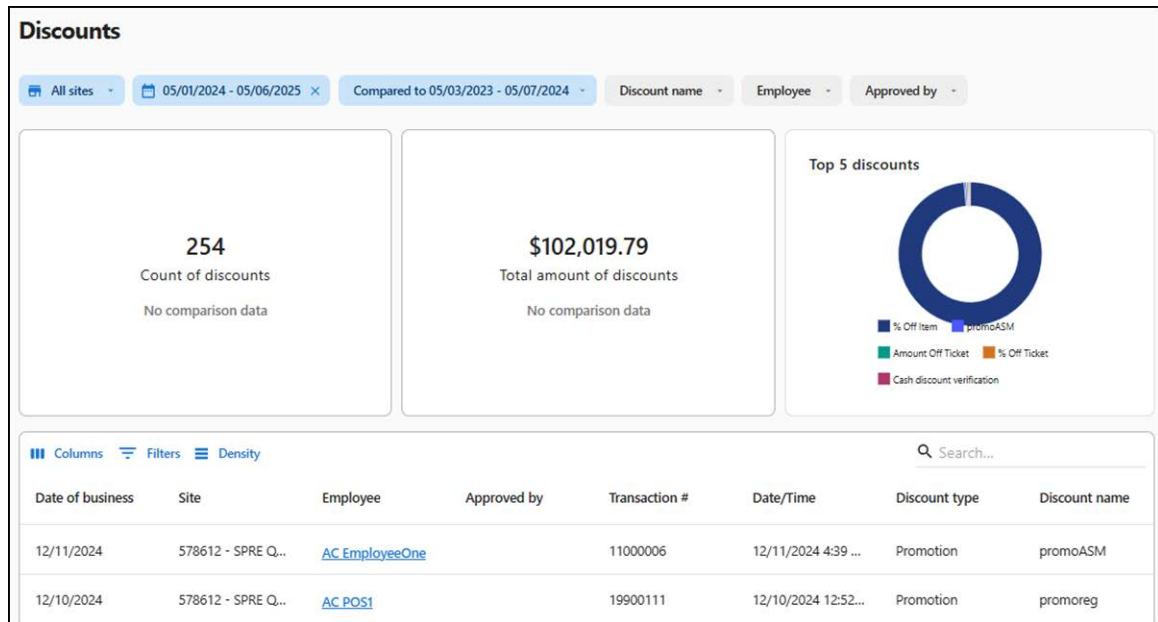
'Taxes' summary

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 **All sites** drop-down list to report. You can toggle the list to **Select 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.

Columns Filters Density Search...							
Date of business	Site	Employee	Approved by	Transaction #	Date/Time	Discount type	Discount name
12/11/2024	578612 - SPRE Q...	AC EmployeeOne		11000006	12/11/2024 4:39 ...	Promotion	promoASM
12/10/2024	578612 - SPRE Q...	AC POS1		19900111	12/10/2024 12:52...	Promotion	promoreg
12/10/2024	578612 - SPRE Q...	AC POS1		19900111	12/10/2024 12:52...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	AC POS1		19900105	12/09/2024 2:59 ...	Promotion	promoreg
12/09/2024	578612 - SPRE Q...	AC POS1		19900103	12/09/2024 2:50 ...	Promotion	promoASM
12/09/2024	578612 - SPRE Q...	AC POS1		19900107	12/09/2024 3:13 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	Daniel Woods		19300160	12/09/2024 10:19...	Comp	\$1.00 Off
12/09/2024	578612 - SPRE Q...	AC POS1		19900103	12/09/2024 2:50 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	AC POS1		19900105	12/09/2024 2:59 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	Daniel Woods		19300160	12/09/2024 10:19...	Comp	\$1.00 Off
12/09/2024	578612 - SPRE Q...	AC POS1		19900103	12/09/2024 2:50 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	AC POS1		19900105	12/09/2024 2:59 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	AC POS1		19900107	12/09/2024 3:13 ...	Promotion	promoreg

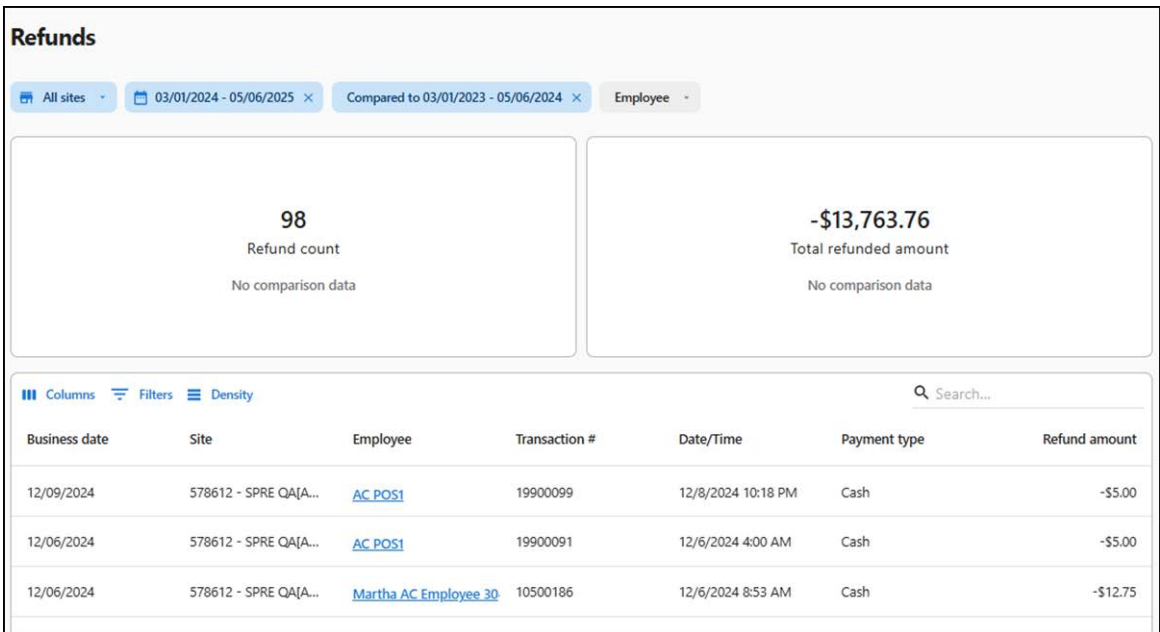
'Discounts' report

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 **All sites** drop-down list to report. You can toggle the list to **Select 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.

Columns Filters Density Search...						
Business date	Site	Employee	Transaction #	Date/Time	Payment type	Refund amount
12/09/2024	578612 - SPRE QA[A...	AC POS1	19900099	12/8/2024 10:18 PM	Cash	-\$5.00
12/06/2024	578612 - SPRE QA[A...	AC POS1	19900091	12/6/2024 4:00 AM	Cash	-\$5.00
12/06/2024	578612 - SPRE QA[A...	Martha AC Employee 30...	10500186	12/6/2024 8:53 AM	Cash	-\$12.75
12/05/2024	578612 - SPRE QA[A...	AC POS1	19900082	12/5/2024 7:38 AM	Cash	-\$5.00
12/05/2024	578612 - SPRE QA[A...	Jenna AC Employee 50...	10500170	12/5/2024 8:53 AM	Cash	-\$18.00
11/25/2024	578612 - SPRE QA[A...	Sankeerth Manda	11000005	11/25/2024 6:12 AM	Cash	-\$399.00
11/14/2024	578612 - SPRE QA[A...	Daniel Woods	19300087	11/14/2024 1:18 AM	Cash	-\$214.00
11/12/2024	578612 - SPRE QA[A...	AC POS1	19900022	11/12/2024 2:49 AM	Cash	-\$5.35
11/12/2024	578612 - SPRE QA[A...	AC POS1	19900022	11/12/2024 2:49 AM	Cash	-\$5.35
11/01/2024	578612 - SPRE QA[A...	Marijana Bogdanovic	10100012	11/1/2024 10:24 AM	Cash	-\$12.75
11/01/2024	578612 - SPRE QA[A...	Marijana Bogdanovic	10100008	11/1/2024 9:21 AM	Cash	-\$10.50
Rows per page: 10 1-10 of 98 < >						

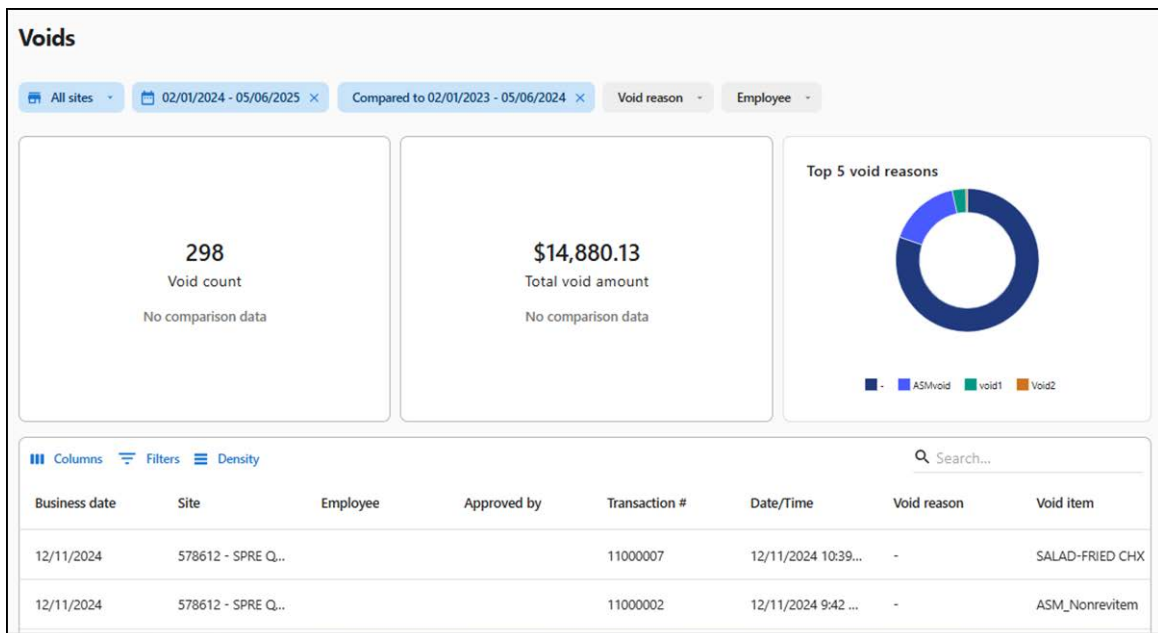
'Refunds' report

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 **All sites** drop-down list to report. You can toggle the list to **Select all Sites**.
3. Select a **date range** from the drop-down list.
4. Select the **Void name** from the drop-down list.
5. Select the **Employee** from the drop-down list.

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

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

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

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

Columns Filters Density Search...							
Business date	Site	Employee	Approved by	Transaction #	Date/Time	Void reason	Void item
12/11/2024	578612 - SPRE Q...			11000007	12/11/2024 10:39...	-	SALAD-FRIED CHX
12/11/2024	578612 - SPRE Q...			11000002	12/11/2024 9:42 ...	-	ASM_Nonrevitem
12/11/2024	578612 - SPRE Q...			11000000	12/11/2024 9:42 ...	-	ASM_nestedmodi...
12/06/2024	578612 - SPRE Q...			19900094	12/06/2024 9:43 ...	-	INCL TAX ITEM 5
12/05/2024	578612 - SPRE Q...			19900071	12/06/2024 12:26...	-	INCL TAX ITEM 5
12/05/2024	578612 - SPRE Q...			11000002	12/05/2024 8:50 ...	-	donreg
12/05/2024	578612 - SPRE Q...			11000002	12/05/2024 8:50 ...	-	BREAKFAST #1
12/05/2024	578612 - SPRE Q...			11000000	12/05/2024 2:08 ...	-	BREAKFAST #1
12/05/2024	578612 - SPRE Q...			10900007	12/05/2024 11:15...	-	Idli
12/04/2024	578612 - SPRE Q...			19900069	12/04/2024 11:02...	-	INCL TAX ITEM 5

'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.

Viewing transactions

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

Transactions

All sites 03/01/2024 - 05/07/2025 Transaction type

Columns Filters Density Search...

Business date	Site	Transaction #	Employee	Customer name	Table name	Terminal
5/29/2024	578612 - SPRE QA[A...	10400000	Sankeerth Manda	Naga		MOBILE2
5/29/2024	578612 - SPRE QA[A...	10400002	Online User	Naga		MOBILE2
5/30/2024	578612 - SPRE QA[A...	10400001	Online User	Naga		MOBILE2
6/21/2024	578612 - SPRE QA[A...	10500001	Sankeerth Manda	Walk-in customer		MOBILE2
6/21/2024	578612 - SPRE QA[A...	10500003	Sankeerth Manda	Walk-in customer		MOBILE2
6/21/2024	578612 - SPRE QA[A...	10500006	Sankeerth Manda	custASM		MOBILE2
6/21/2024	578612 - SPRE QA[A...	10500010	Sankeerth Manda	Walk-in customer		MOBILE2
6/21/2024	578612 - SPRE QA[A...	10500008	Sankeerth Manda	Walk-in customer		MOBILE2
6/21/2024	578612 - SPRE QA[A...	10500009	Sankeerth Manda	Walk-in customer		MOBILE2
6/21/2024	578612 - SPRE QA[A...	10500014	Sankeerth Manda	Walk-in customer		MOBILE2

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'Transactions' report

To run the Transactions view:

1. Select **Sales > Transactions**. The 'Transactions view' for the previous day appears by default.
2. Select a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select 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.

To view any transaction detail

1. Click any **transaction**.

The screenshot displays the 'Transactions' report interface. On the left, a table lists transactions with columns for Business date, Site, Transaction #, and Employee. The transaction #10400001 is highlighted. On the right, a slide-out window provides details for this transaction, including site information, transaction dates, and a line item breakdown for 'HAM' and '1x AVOCADO' with a total amount of \$87.40.

Business date	Site	Transaction #	Employee
5/29/2024	578612 - SPRE QA[A...	10400000	Sankeerth Manda
5/29/2024	578612 - SPRE QA[A...	10400002	Online User
5/30/2024	578612 - SPRE QA[A...	10400001	Online User
6/21/2024	578612 - SPRE QA[A...	10500001	Sankeerth Manda
6/21/2024	578612 - SPRE QA[A...	10500003	Sankeerth Manda
6/21/2024	578612 - SPRE QA[A...	10500006	Sankeerth Manda
6/21/2024	578612 - SPRE QA[A...	10500010	Sankeerth Manda
6/21/2024	578612 - SPRE QA[A...	10500008	Sankeerth Manda

Field	Value
Site	SPRE QA[ASM] [E2ETest1]
Business date	5/30/2024
Table name	-
Terminal	MOBILE2
Transaction opened	5/30/2024 7:53 AM
Transaction closed	5/29/2024 11:02 PM
Employee name	Online User
Customer name	Naga
Guest count	1

Item	Quantity	Amount
HAM	1	\$70.00
1x AVOCADO		\$6.00
Subtotal		\$76.00
Tips & gratuity		\$0.00
Taxes		\$11.40
EXCL TAX (15.00%)		\$11.40
Total		\$87.40

Transaction details

2. 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 #10400001			
Site	SPRE QA[ASM] [E2ETest1]	Business date	5/30/2024
Table name	-	Terminal	MOBILE2
Transaction opened	5/30/2024 7:53 AM	Transaction closed	5/29/2024 11:02 PM
Employee name	Online User	Customer name	Naga
Guest count	1		
HAM	1		\$70.00
1x AVOCADO			\$6.00
	Subtotal		\$76.00
	Tips & gratuity		\$0.00
	Taxes		\$11.40
	EXCL TAX (15.00%)		\$11.40
	Total		\$87.40

Transaction details in PDF

3. Click **Download as PDF** to download the transaction details in PDF.
4. Click **Close** to exit the transaction details window.

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

All sites
03/03/2024 - 05/07/2025
Employee
Terminal
Event type

Columns Filters Density Search...

Site	Employee	Terminal	Event time ↑	Event type	Details
SPRE QA[ASM][E2ETest1]	Sankeerth Manda	MOBILE2	05/29/2024 2:23 AM	REOPEN_TRANSACTION	UPDATED
SPRE QA[ASM][E2ETest1]	Sankeerth Manda	MOBILE2	05/29/2024 2:23 AM	REOPEN_TRANSACTION	UPDATED
SPRE QA[ASM][E2ETest1]	Sankeerth Manda	MOBILE2	05/29/2024 2:23 AM	ORDER_ITEMS	HAM
SPRE QA[ASM][E2ETest1]	Sankeerth Manda	MOBILE2	05/29/2024 2:23 AM	ORDER_ITEMS	AVOCADO
SPRE QA[ASM][E2ETest1]	Sankeerth Manda	MOBILE2	05/29/2024 2:23 AM	TRANSACTION_OPEN	10400000
SPRE QA[ASM][E2ETest1]	Sankeerth Manda	MOBILE2	05/29/2024 2:23 AM	BEGIN_ORDER	
SPRE QA[ASM][E2ETest1]	Sankeerth Manda	MOBILE2	05/29/2024 2:24 AM	TRANSACTION_CLOSE	10400000
SPRE QA[ASM][E2ETest1]	Sankeerth Manda	MOBILE2	05/29/2024 2:24 AM	TENDERS_PAYMENTS	Transaction #10400000; ...
SPRE QA[ASM][E2ETest1]	Online User	MOBILE2	05/29/2024 8:14 AM	REOPEN_TRANSACTION	UPDATED
SPRE QA[ASM][E2ETest1]	Online User	MOBILE2	05/29/2024 8:14 AM	TRANSACTION_OPEN	10400002

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'POS event log' screen

2. Select a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select 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.

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.

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

ColumnsFiltersDensity

Search...

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	 

Rows per page: 101-4 of 4

‘Edit company links’ screen

To create a company link:

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

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	

Rows per page: 10 1-4 of 4

'Edit company links' screen

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

Link URL

Link text

Viewers

Everyone

Cancel Save

'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:

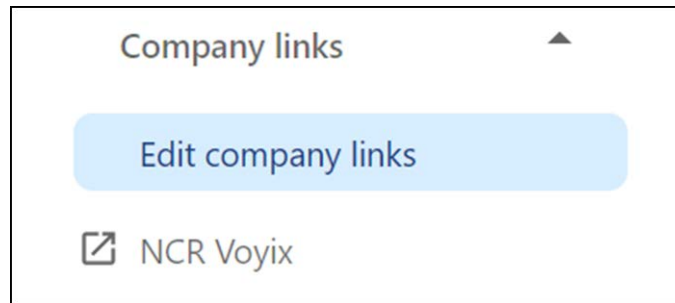
Role	Description
Everyone	All user can view the link. No user restrictions.
Account/Bookkeeper	Only accountants and bookkeepers can view the link.
Administrator	Only the users with administrator rights can view the link.
Assistant Manager	Only assistant managers can view the link.
Employee	All employees can view the link.
Restaurant Manager	Only restaurant managers can view the link.
NCR Voyix Support	All members of NCR Voyix 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.			
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

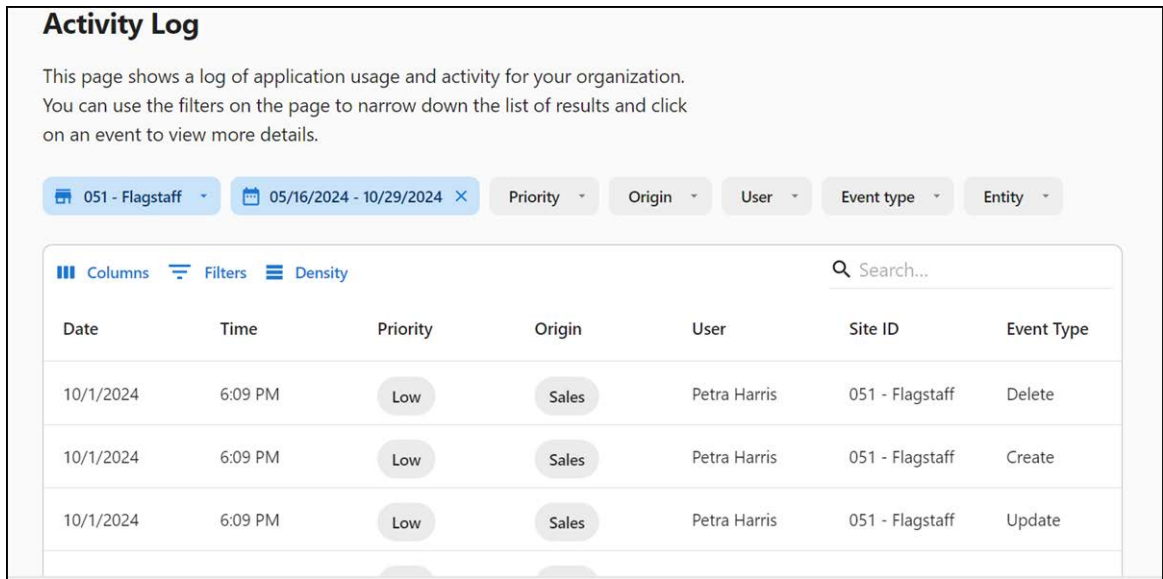
You can **Edit** or **Delete** the company link using the icons provided in the link's row.

Viewing the Activity Log

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

To view the Activity Log:

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



Activity Log landing page

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

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

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

Origin — Module impacted due to the activity.

User — Employee who performed the activity.

Sites — Site at which the activity occurred.

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

Entity — Business entity impacted.

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.

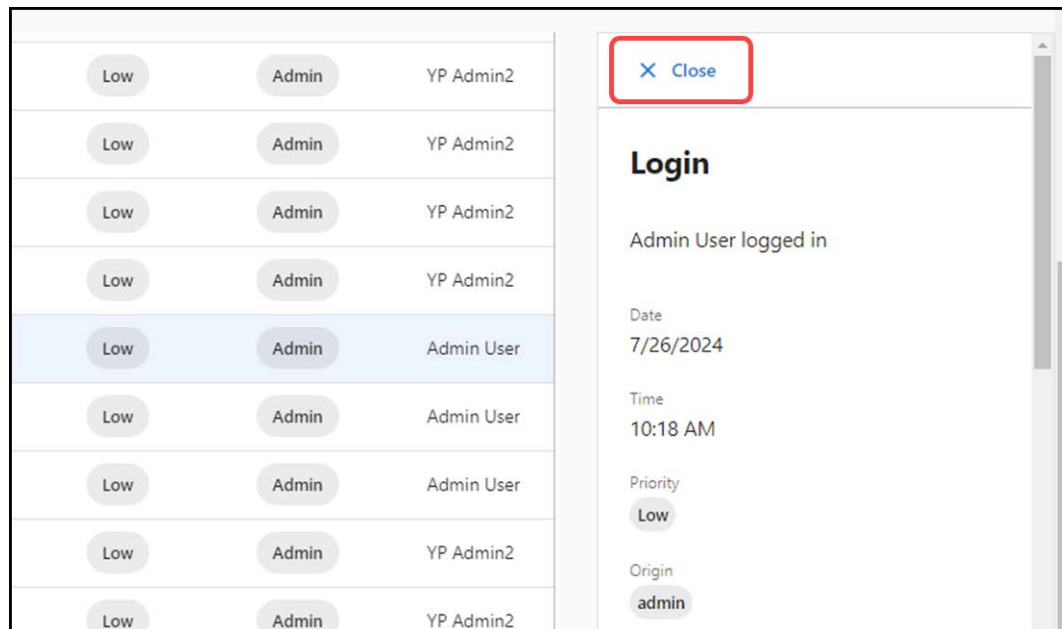
Pub Sub Message ID — Unique pub-sub message ID.

Payload — Actual payload message.

The screenshot displays the 'Activity Log' interface. On the left, there's a header 'Activity Log' with a description: '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.' Below this are filter buttons: 'All sites', '07/11/2024 - 10/29/2024', 'Priority', 'Origin', 'User', 'Event type', and 'Entity'. A table with columns 'Date', 'Time', 'Priority', and 'Origin' is shown. The table has two rows: one for '10/12/2024' at '1:21 AM' with 'Low' priority and 'Inventory' origin, and another for '10/12/2024' at '1:20 AM' with 'Low' priority and 'Inventory' origin. On the right, a side panel titled 'Update' is open, showing details for the selected event: 'Raw item Apples 4 with Category ID 5140 wa', '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

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.’

Working with ‘Organization settings’

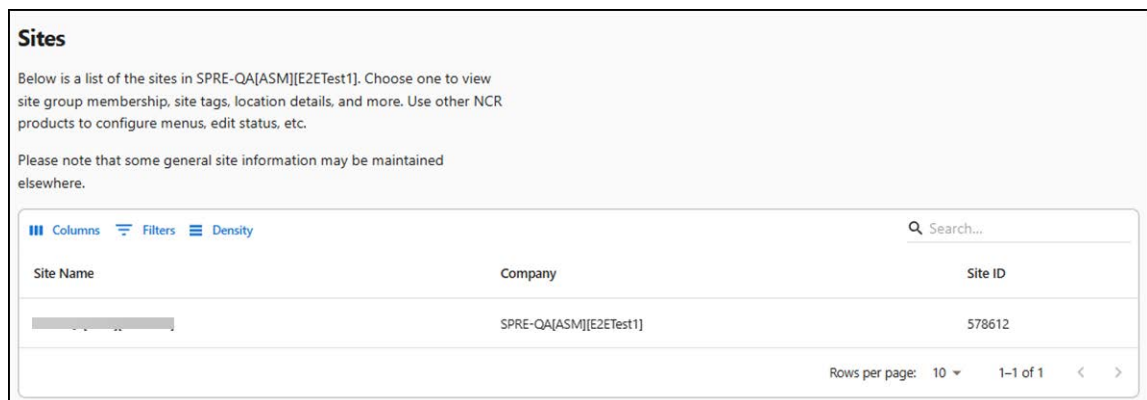
Use ‘Organization settings’ to view location details for sites to which you are assigned and to establish your fiscal calendar.

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.



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

‘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.

Fiscal calendar

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

Today is April 16, 2025

Calendar Configuration

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	
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.

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



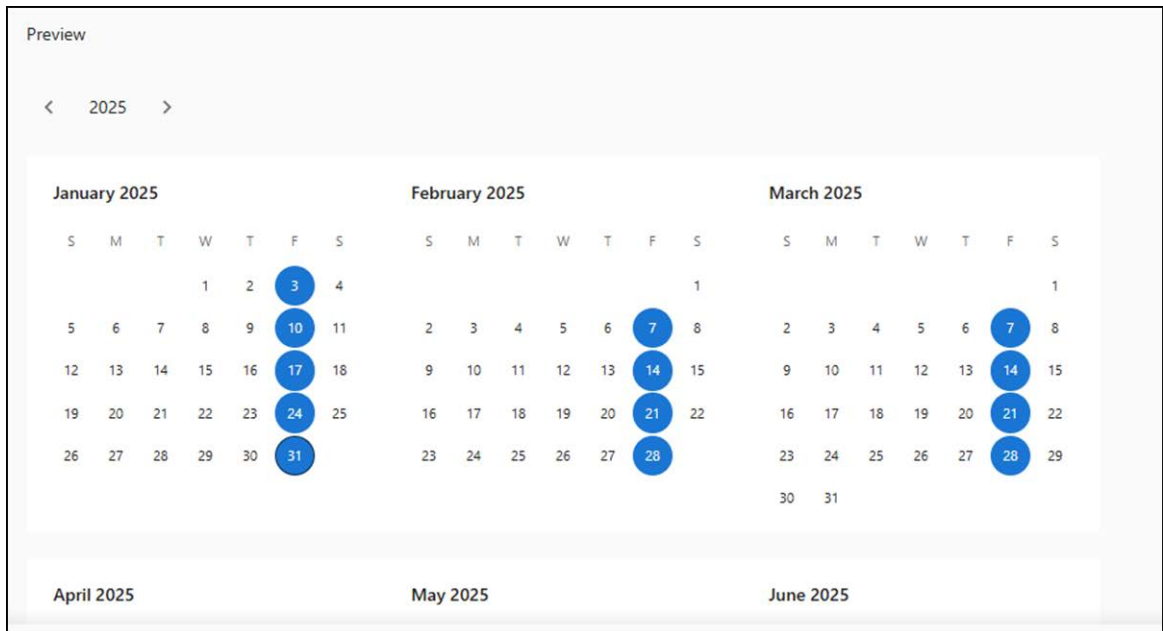
Choose your payroll period frequency

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

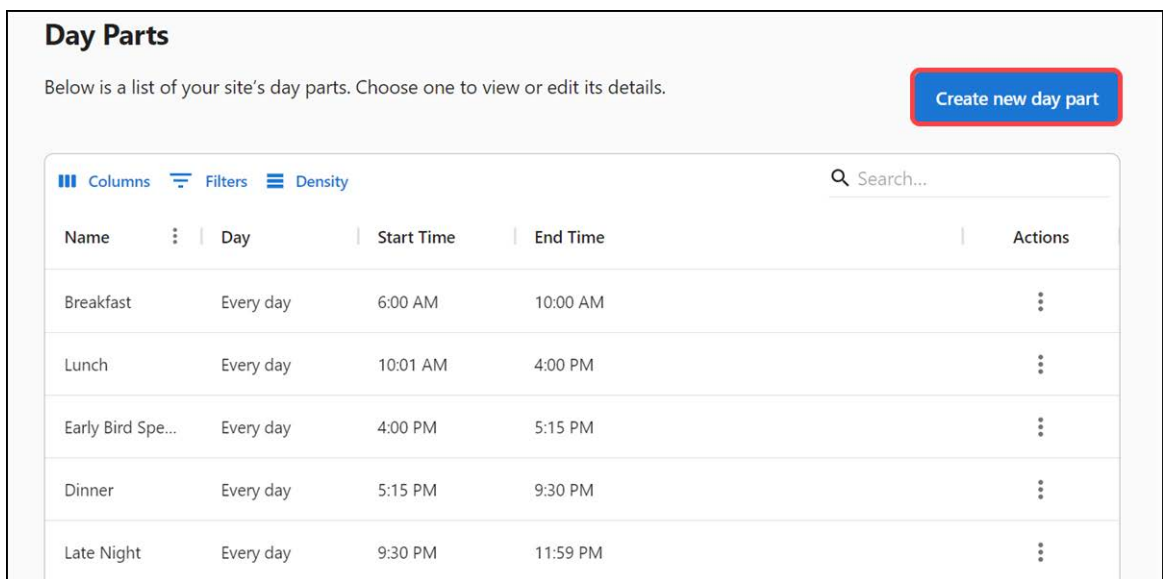
4. Click **Save**.

Configuring a day part

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

To configure a day part:

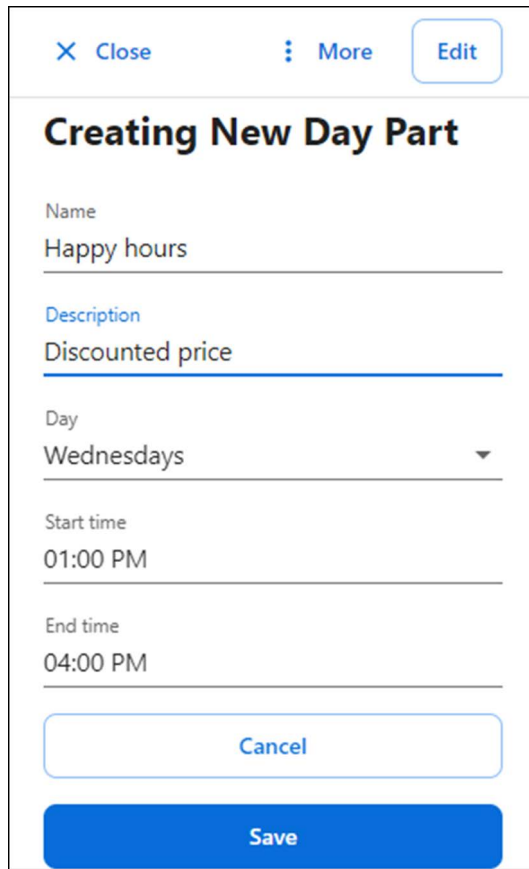
1. Select **Settings > Site settings > Day parts**. The Day Parts screen appears.



Creating a day part

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

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



Close More Edit

Creating New Day Part

Name
Happy hours

Description
Discounted price

Day
Wednesdays

Start time
01:00 PM

End time
04:00 PM

Cancel Save

Day part

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

To edit a day part:

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

To delete a day part:

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

Working with Labor settings

Use 'Labor settings' to configure the labor rules and 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.

Setting the Workday and Workweek

A workday is the 24-hour period beginning at the time selected and a workweek is the 7-day period beginning with the day selected. You can set the start of the workweek or workday for the organization or site, enabling labor and scheduling functions, such as overtime calculation and schedule management, to utilize this configuration.

To set the workweek/workday for a schedule:

1. Select **Settings > Labor settings > Workday and Workweek**. The 'Workday and workweek' screen appears.

Workday and workweek settings Last edit was 5/15/2025 by default

Workday start time *
03:00 AM

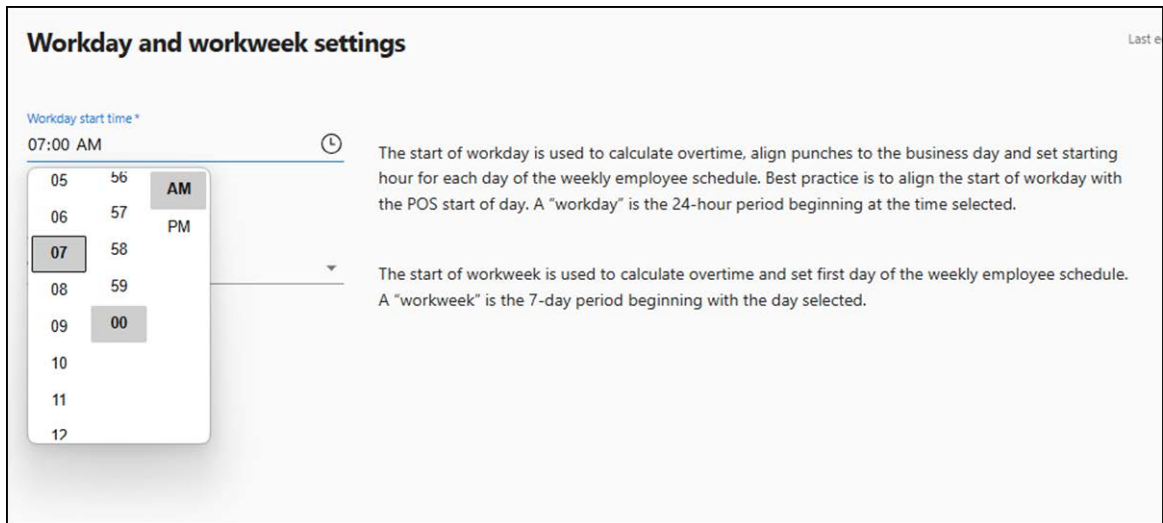
The start of workday is used to calculate overtime, align punches to the business day and set starting hour for each day of the weekly employee schedule. Best practice is to align the start of workday with the POS start of day. A "workday" is the 24-hour period beginning at the time selected.

Workweek start day *
Wednesday

The start of workweek is used to calculate overtime and set first day of the weekly employee schedule. A "workweek" is the 7-day period beginning with the day selected.

Workday and Workweek settings

2. Click the **Workday start time**.



Workday and workweek settings Last edit was 5/15/2025 by default

Workday start time *

07:00 AM

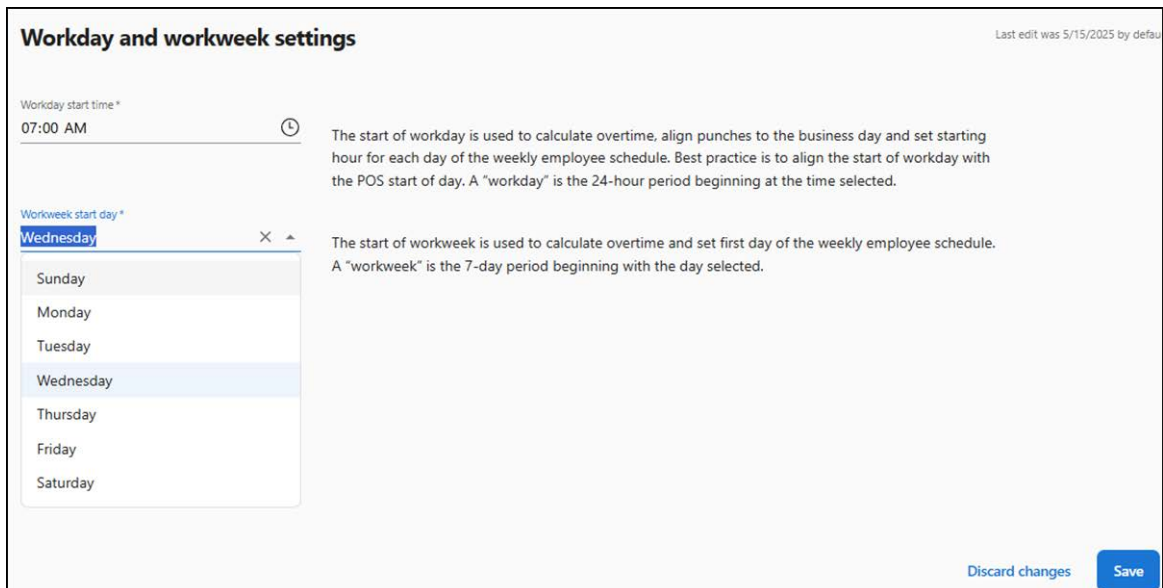
05 56 AM
06 57 PM
07 58
08 59
09 00
10
11
12

The start of workday is used to calculate overtime, align punches to the business day and set starting hour for each day of the weekly employee schedule. Best practice is to align the start of workday with the POS start of day. A "workday" is the 24-hour period beginning at the time selected.

The start of workweek is used to calculate overtime and set first day of the weekly employee schedule. A "workweek" is the 7-day period beginning with the day selected.

Workday settings

3. **Type** the time or **click** the clock icon to select from the drop-down list.
The start of workday is used to calculate overtime, align punches to the business day and set starting hour for each day of the weekly employee schedule.
4. Click the **Workweek start day**.



Workday and workweek settings Last edit was 5/15/2025 by default

Workday start time *

07:00 AM

Workweek start day *

Wednesday

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

The start of workday is used to calculate overtime, align punches to the business day and set starting hour for each day of the weekly employee schedule. Best practice is to align the start of workday with the POS start of day. A "workday" is the 24-hour period beginning at the time selected.

The start of workweek is used to calculate overtime and set first day of the weekly employee schedule. A "workweek" is the 7-day period beginning with the day selected.

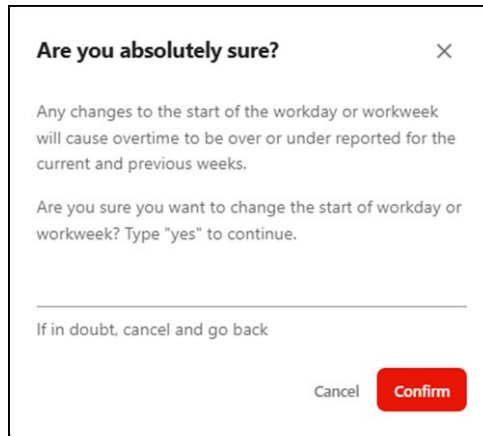
[Discard changes](#) [Save](#)

Workweek settings

5. Type to enter a day or **click** to select from the drop-down list.

The start of workweek is used to calculate overtime and set first day of the weekly employee schedule.

6. Click **Save**.

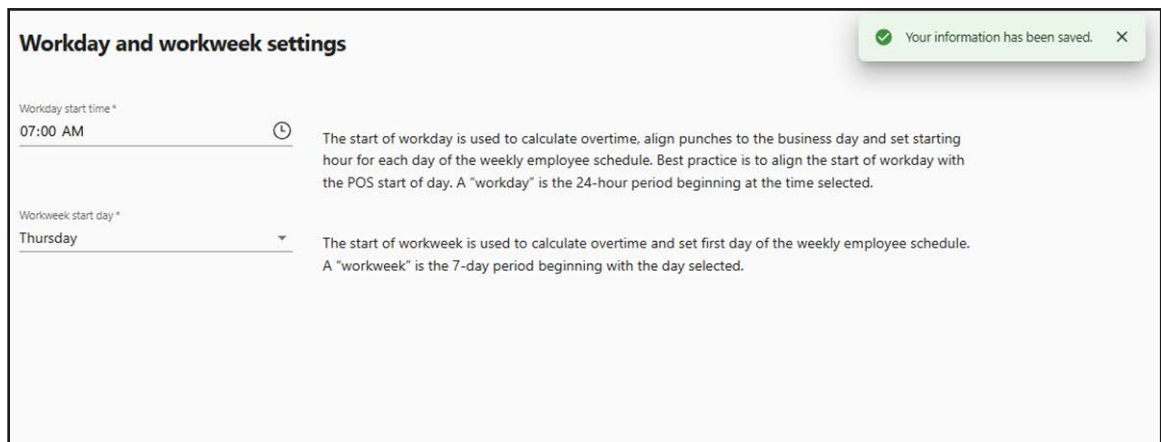


A confirmation window dialog box with a title bar that says "Are you absolutely sure?" and a close button (X). The main text reads: "Any changes to the start of the workday or workweek will cause overtime to be over or under reported for the current and previous weeks. Are you sure you want to change the start of workday or workweek? Type 'yes' to continue." Below the text is a text input field. At the bottom, there is a line of text: "If in doubt, cancel and go back". At the bottom right, there are two buttons: "Cancel" and "Confirm".

Confirmation window

A confirmation window appears asking to confirm the start of the workday and workweek.

7. Type **yes** to continue and click **Confirm**.



A screenshot of the "Workday and workweek settings" screen. At the top right, there is a green notification banner that says "Your information has been saved." with a close button (X). The screen has two main sections. The first section is "Workday start time *" with a clock icon, showing "07:00 AM". The second section is "Workweek start day *" with a dropdown arrow, showing "Thursday". To the right of these sections, there is explanatory text: "The start of workday is used to calculate overtime, align punches to the business day and set starting hour for each day of the weekly employee schedule. Best practice is to align the start of workday with the POS start of day. A 'workday' is the 24-hour period beginning at the time selected." and "The start of workweek is used to calculate overtime and set first day of the weekly employee schedule. A 'workweek' is the 7-day period beginning with the day selected."

Confirmation message

A confirmation message appears on the screen with changed workday and workweek settings.

Configuring labor rules

The labor rules configuration section enables you to abide by specific rules in the United States (US) in accordance with the US Department of Labor. The rules are enforced by state and jurisdiction laws and the site or company could incur penalties and lawsuits if they are not followed.

Important

We strongly recommend you consult the labor regulations in your area to ensure you are in compliance. Aloha Smart Manager provides the tools to abide by the labor rules; however, it is your responsibility to follow and enforce them.

Viewing and accepting the user agreement

Each admin user is required to sign the user agreement that explains the liability and responsibility of using labor rules. The agreement appears automatically for each new admin who tries to access the Labor Rules function and they cannot edit any of the rules until they have signed the agreement. The default rules are for reporting.

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

Labor rules configuration

View User Agreement 

North_Carolina

Overtime

Overtime rule guidance for North Carolina ^

Rule	Federal Guidance	State Guidance
Weekly overtime	After working over 40 hours in a week, employee will be paid 1.5 times their regular pay. https://www.dol.gov/agencies/whd/overtime	No known requirements
Daily overtime	No known requirements	No known requirements
24-hour daily overtime starting period	A workday is defined as a period of 24 consecutive hours which begins with the work week start . https://www.dol.gov/agencies/whd/overtime	No known requirements
7th consecutive day overtime	No known requirements	No known requirements

View user agreement

2. Click **View User Agreement**. The Labor Rules User Agreement screen appears.

Labor Rules User Agreement

Last revised: 07/31/2024

Please read this Labor Rules User Agreement (this "Agreement") carefully, as it governs your use of NCR Voyix Corporation's ("NCR Voyix") Aloha Smart Manager or other NCR Voyix services (the "Services") in connection with the configuration of labor rules. If you are accessing NCR Voyix's services on behalf of a legal entity (like your employer), you agree that you have the authority to bind that entity to these terms, and "you" and "your" will refer to that entity. This Agreement supplements your master agreement, merchant agreement or similar customer agreement with NCR Voyix (the "Master Agreement") and will prevail over any conflicting terms in the Master Agreement.

For restaurant locations in the United States, labor rules and calculations included in the Services will be initially

☒ I hereby agree to this Agreement and acknowledge that I am solely responsible for accurate and lawful labor rule configuration.

☒ I understand that any labor rules information provided by NCR is provided for convenience and not as legal guidance.

Full Name*

Date of acceptance * 06/04/2025

Done

View user agreement

3. Select the **acknowledgments**.
4. Type your **name** in 'Full Name.'
5. Click **Done** to indicate your acceptance of the agreement and exit.

Viewing your labor rules

1. Select **Settings > Labor settings > Labor rules**. The 'Labor rules configuration' screen appears with the Overtime tab as the active tab. Use this tab to view the extra wage payout rule that includes Weekly overtime, Daily overtime, Workday definition, and 7th consecutive day overtime.

Labor rules configuration			View User Agreement
North_Carolina			
Overtime			
Overtime rule guidance for North Carolina			
Rule	Federal Guidance	State Guidance	
Weekly overtime	After working over 40 hours in a week, employee will be paid 1.5 times their regular pay. https://www.dol.gov/agencies/whd/overtime	No known requirements	
Daily overtime	No known requirements	No known requirements	
24-hour daily overtime starting period	A workday is defined as a period of 24 consecutive hours which begins with the work week start . https://www.dol.gov/agencies/whd/overtime	No known requirements	
7th consecutive day overtime	No known requirements	No known requirements	

Labor rules

2. Select a **state** from the drop-down list that appears in the top left corner to display the Jurisdiction pop up window. The states in which your sites reside appear on the 'My Sites' tab.
3. If you are an administrator and your company is expanding into a neighboring state, select the **Other** tab, click the **arrow** next to the applicable state, and select the **county** from the list that appears. The 'Other' tab is only available to an administrator and shows all jurisdictions where the company does not have a site. For example, the company has sites in Texas, but as an admin, you can select Oklahoma in the 'Other' tab and ensure the rules are ready when the new site opens. A manager can only view the sites to which they are assigned and with no editing capabilities.
4. Scroll down the **page** to view the **labor rules** applicable to your selection.

Editing a labor rule

Labor rules can change over time. You can edit a rule to stay compliant with the law; however, you must digitally sign a legal agreement of acknowledgment of the change.



Warning

Before you change a labor rule ensure you are in compliance with those labor laws.

1. Scroll down the Labor rules configuration page to locate the **labor rule type** to change.

☒ **Weekly overtime**

Edit labor rule

Custom configuration, effective 06/04/2025

After working over **50** hours in a week, employee will be paid **1.5** times their regular pay.

Sites in this jurisdiction

ColumnsFiltersDensity

Search...

Site name	Site ID	Configuration	Effective date	Effective Until	Reason for change	Action
QE Staging Accepta...	1	State	2025-06-04		LAW_CHANGED	

Rows per page: 51-1 of 1

Edit labor rule

2. To deactivate an active rule, select the **check box** next to the labor rule type. A prompt appears requiring you to digitally sign an agreement to deactivate the rule. Select the **two acknowledgments**, the **reason** for the change, and click **Deactivate**.

- To edit a rule, click **Edit labor rule**. If the rule is currently inactive, you must first select the **check box** next to the labor rule type to enable 'Edit labor rule.' The 'Edit labor rule' screen appears. The currently defined labor rule appears as a reference.

LABOR RULES / EDIT LABOR RULE

Edit labor rule

Jurisdiction
Georgia

Weekly overtime

Jurisdiction default configuration, effective 01/01/2022 (Current)

After working over **40** hours in a week, employee will be paid **1.5** times their regular pay.

Schedule new rule configuration

Affected sites

Sites without custom configurations will inherit values of the updated state-wide configuration

State	Site name	Site ID	Configuration
Georgia	Manual/Smoke Test Site	2	Federal

Rows per page: 5 1-1 of 1

Excluded sites

All excluded sites will keep their current configuration

State	Site name	Site ID	Configuration
No rows			

Rows per page: 5 0-0 of 0

Cancel Save

Schedule new rule configuration

- Click **Schedule new rule configuration** to add the customized rule to your site.

'Edit labor rule' screen

- Edit the **labor rule**, as needed.
- Click **Add concurrent rule** to add more parameters to the rule, if required.
- Verify the **affected** and **excluded sites** receiving the change are correct.
- Click **Save** to save the changes. A confirmation screen appears.

Acknowledge labor rules

- Choose a **reason for the change** to the labor rule.
- Select the **date** on which to start the labor rule. The earliest date available is the first day of the next schedule week. You can schedule a rule to take effect as far into the future as needed. For

example, if you know the minimum wage is increasing on January 1st, you can enter the change now and not have to worry about it in December.

11. Click **Save** to save the changes or click **Go back** to cancel the changes and return to the labor rules screen.

Labor rules configuration

Weekly overtime saved. Update is scheduled to go into effect for selected sites in North Carolina on 2025-06-04

North Carolina

Overtime

Overtime rule guidance for North Carolina

Rule	Federal Guidance	State Guidance
Weekly overtime	After working over 40 hours in a week, employee will be paid 1.5 times their regular pay. https://www.dol.gov/agencies/whd/overtime	No known requirements
Daily overtime	No known requirements	No known requirements
24-hour daily overtime starting period	A workday is defined as a period of 24 consecutive hours which begins with the work week start . https://www.dol.gov/agencies/whd/overtime	No known requirements
7th consecutive day overtime	No known requirements	No known requirements

Confirmation message

A confirmation message appears on the screen with the updated changes. The 'Sites in this jurisdiction' table under the labor rule type is updated with the level of enforcement in 'Configuration,' the effective date the law begins, the effective date the law ends, and the reason for the change.

☒ Weekly overtime
 Edit labor rule

Jurisdiction default configuration, effective until 06/10/2025

After working over **40** hours in a week, employee will be paid **1.5** times their regular pay.

Sites in this jurisdiction

Columns Filters Density

Search...

Site name	Site ID	Configuration	Effective date	Effective Until	Reason for change	Action
QE Staging Acceptance ...	1	State	2025-06-04		LAW_CHANGED	

Rows per page: 5 1-1 of 1

Updated details in tabular format

12. Click the **pencil** icon at the right end of the column to edit or change the rule.

13. If you need to edit 'Daily overtime,' '24-hour daily overtime starting period,' '7th consecutive day overtime,' repeat **steps 3 through 12**.

LABOR RULES / EDIT LABOR RULE

Edit labor rule

Jurisdiction
North Carolina

Weekly overtime

Custom configuration, effective 06/04/2025 (Current)

After working over **45** hours in a week, employee will be paid **1.5** times their regular pay.

+ Schedule new rule configuration

Restore default

14. If you need to restore previous settings, click **Restore default** on the right side of the screen.



Note

The 'Restore default' button appears when you start editing a rule.

Restore default rule: Weekly overtime

Are you sure you want to restore to default settings for this jurisdiction? Any upcoming rule configurations will be deleted. This change will automatically go into effect at the start of the next business day.

Jurisdiction default configuration

After working over **40** hours in a week, employee will be paid **1.5** times their regular pay.

All fields are required*

Please accept the following terms and conditions to proceed:

☐ I acknowledge that I am solely responsible for accurate and lawful labor rule configuration and that this change may impact employees' pay.

Reason for change *

Labor rule effective date *06/05/2025

[Go back](#)[Restore to default](#)

Acknowledge restore default

15. Select the **Reason for change** from the drop-down list and click **Restore default**. The rule resets to the default.

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.

Busser

Job details

Employees

JOB CONFIGURATION / BUSSER

Job details

Identification

Show job on the POS system

Name*

Busser

The job used on the POS system.

Exclude hours and dollars from payroll

Exclude hours and dollars from schedule metrics

Labor group

Back of House

GL code

Read only

For more information about GL codes, refer to the Uniform System of Accounts for Restaurants.

Close

Save

'Job details' screen

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Use and Disclose Solely Pursuant to Company Instructions

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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 / BUSSE

Job details

Employees

Employees

This is a list of employees configured to this job.

Columns Filters Density Search...	
Name	Employee POS ID
Teddy Ellis	434323
Lokesh Kalyan	145154
Harry Floeter	10001
Manager Long Email	10006

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 29](#) for more information.

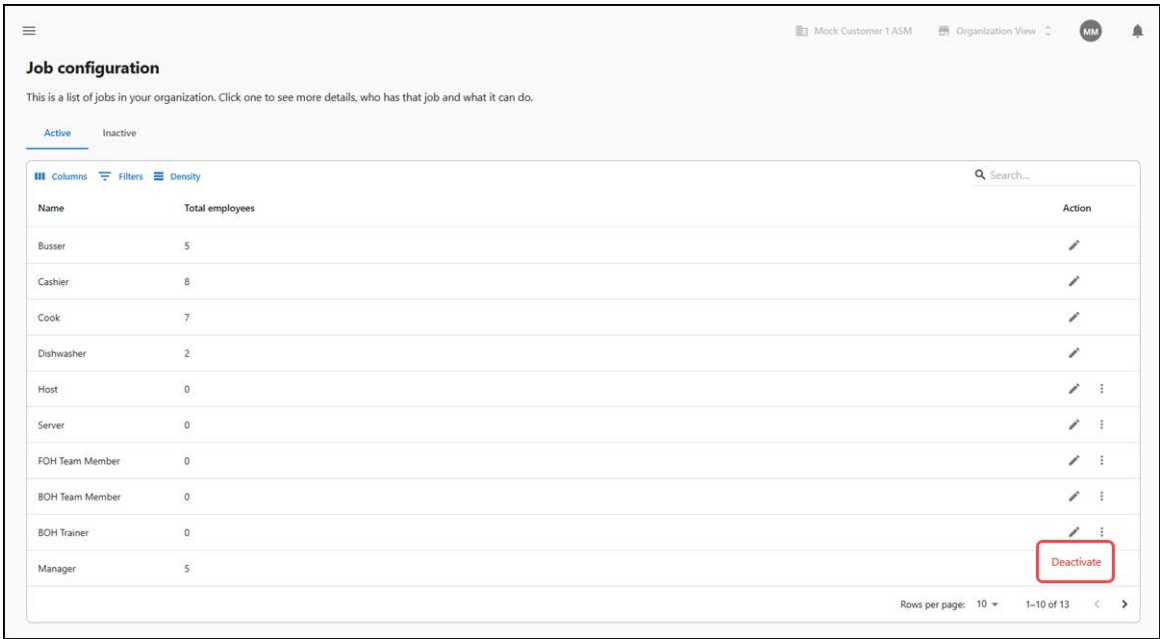
Making a job inactive

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.

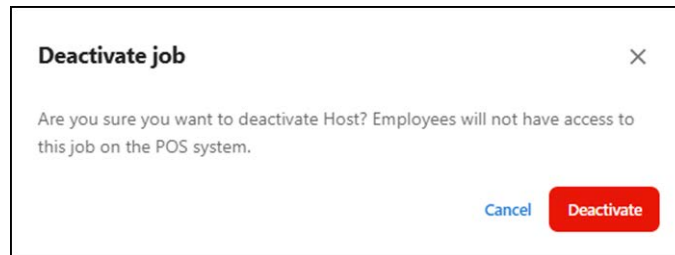
To deactivate a job:

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



Deactivate a job

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



Confirm job deactivation

- 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:

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

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	
FOH Team Member	0	

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.

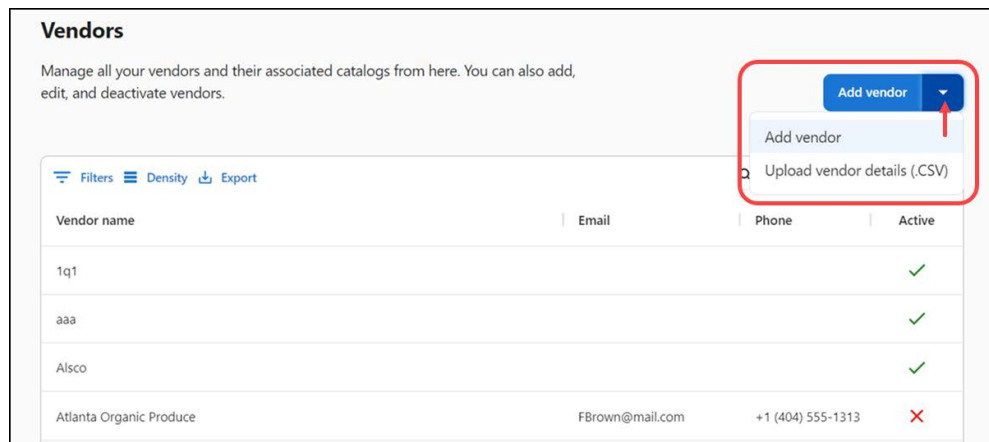
You will need the country.CSV, countrycode.CSV, and state.CSV as a reference for entering the data into vendors_data_import.CSV.

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.

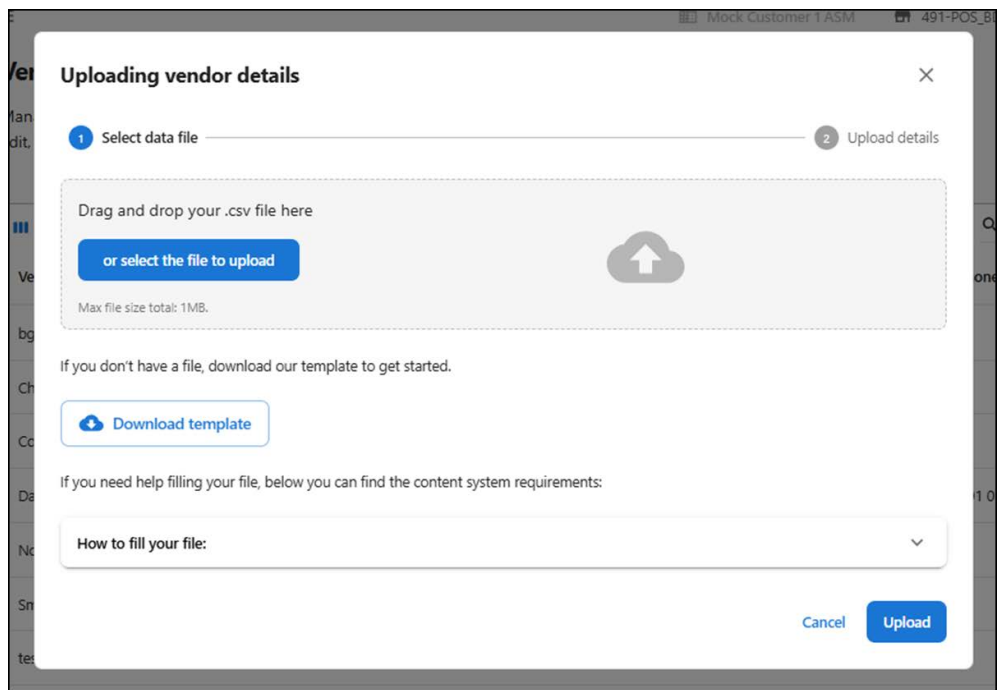
To upload vendors in bulk:

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

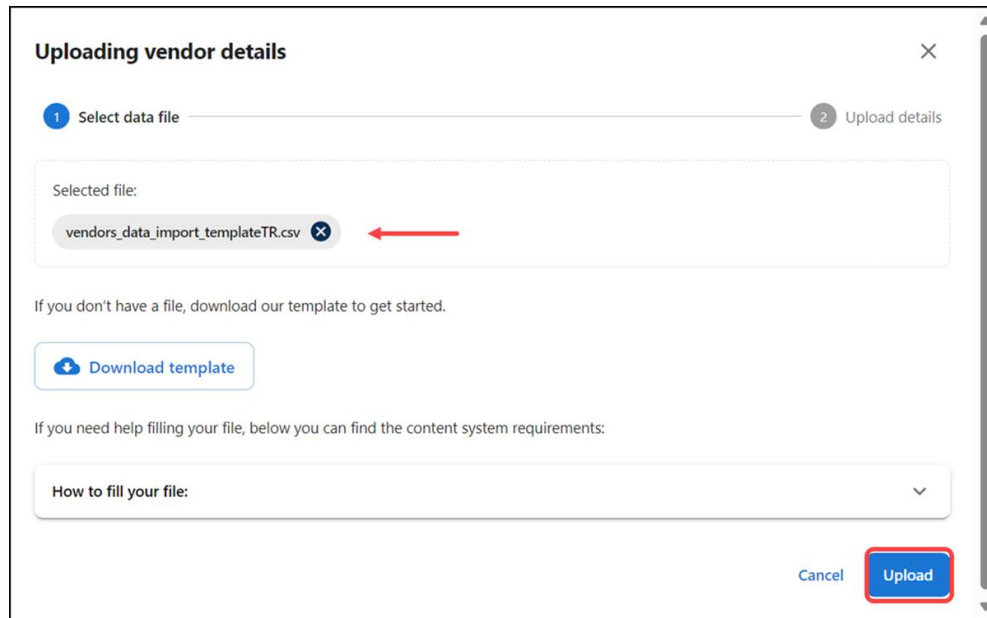
- Click **Download template**. The file automatically downloads vendor_data_import.CSV.
- Click the **How to fill your file** drop-down to expose instructions for completing the spreadsheet.
- Type or copy and paste the **vendor information** into vendor_data_import.CSV..

	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 n:	Email add	Customer	Comments		
2	Mark	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@test	123456	This is comments	
3	John	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@test	123456	This is comments	
4	Francis	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@test	123456	This is comments	
5																

Adding vendor information in bulk

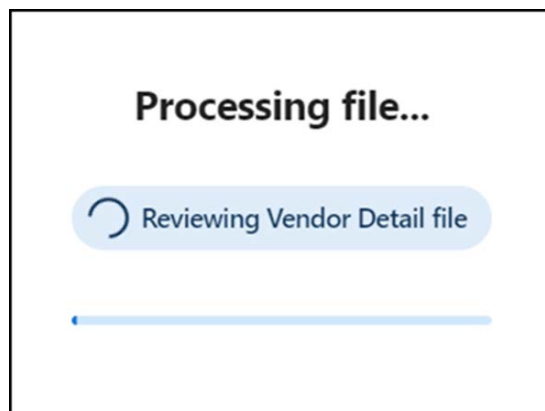
- Return to the **Uploading vendor details** screen and upload the **.CSV file** by performing **one** of the following:
 - Drag and drop **vendor_data_import.CSV** into the appropriate area.-OR-

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



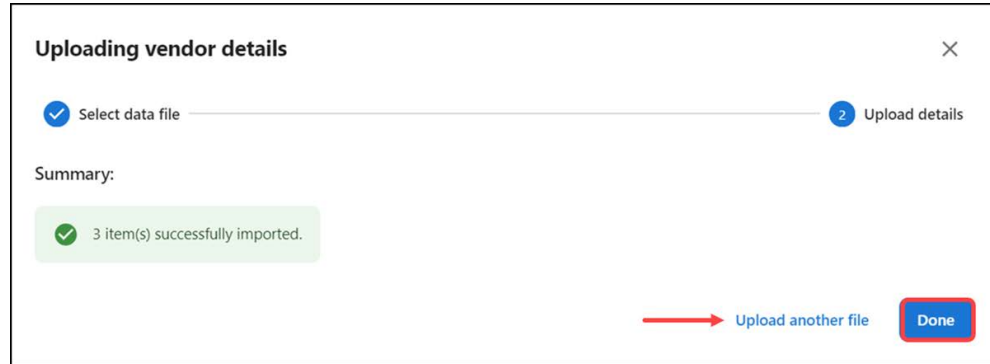
Selecting vendors file list

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.

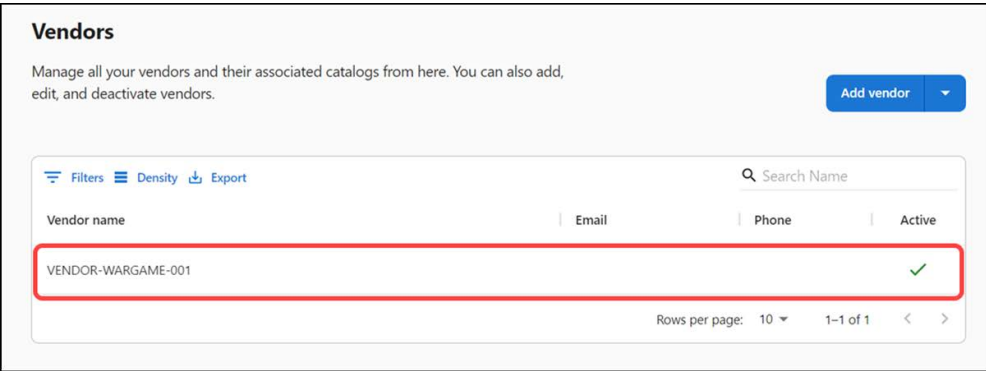
You will need the container.CSV, purchaseunit.CSV, and category.CSV as a reference for entering the data into vendors_item_import_template.CSV.

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.

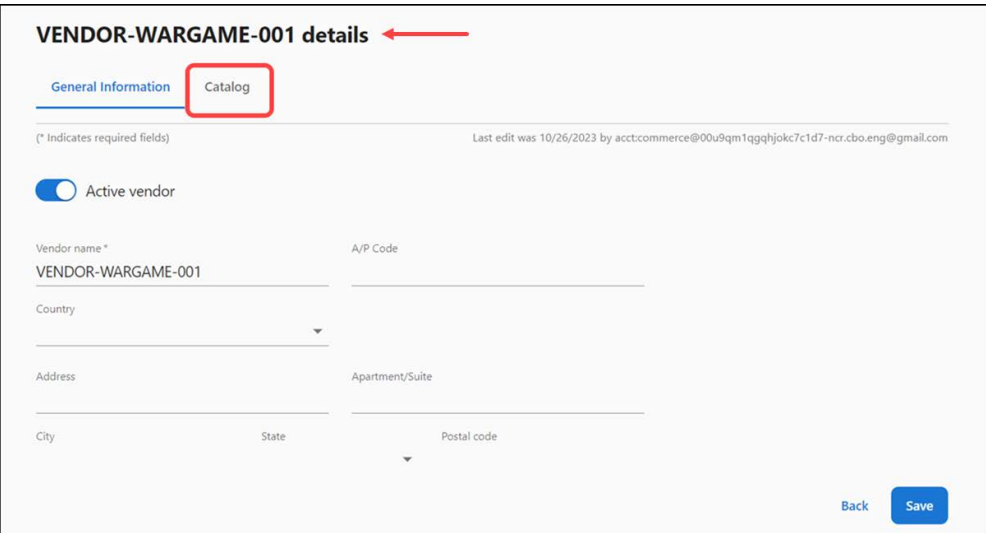
To upload vendor items in bulk:

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



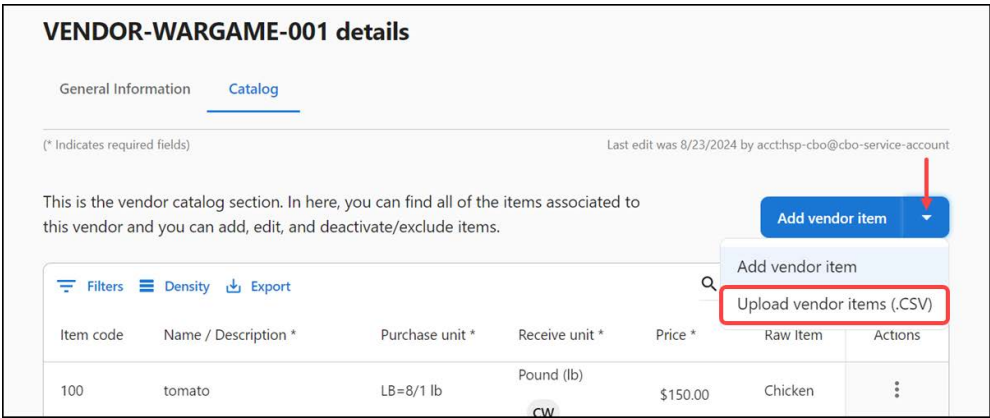
'Vendors' screen

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.



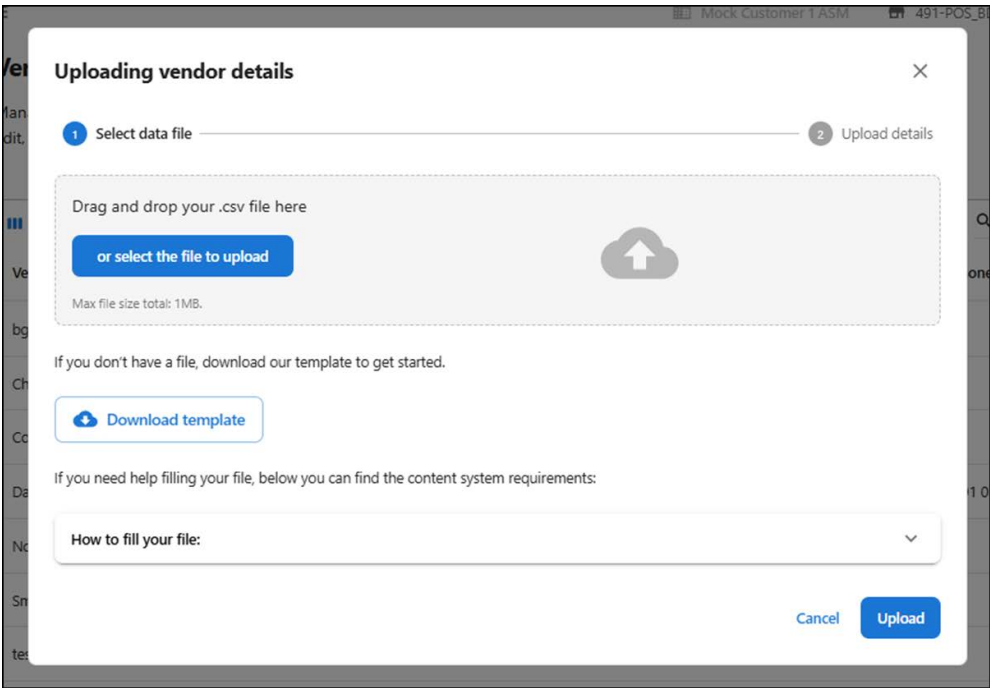
'General information' tab

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.

Uploading vendor items

1 Select data file

2 Upload details

Selected file:

vendor_item_starter_import_template.csv

If you don't have a file, download our template to get started.

Download template

If you need help filling your file, below you can find the content system requirements:

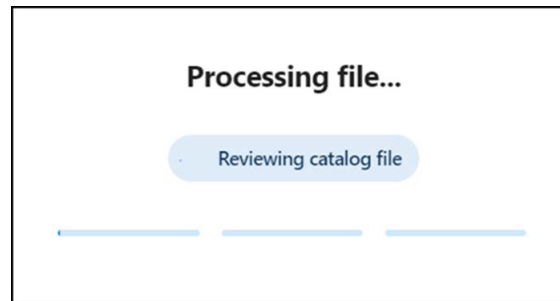
How to fill your file:

Cancel

Upload

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@00u7dcnymxkqujvw697-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

FiltersDensity

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

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.



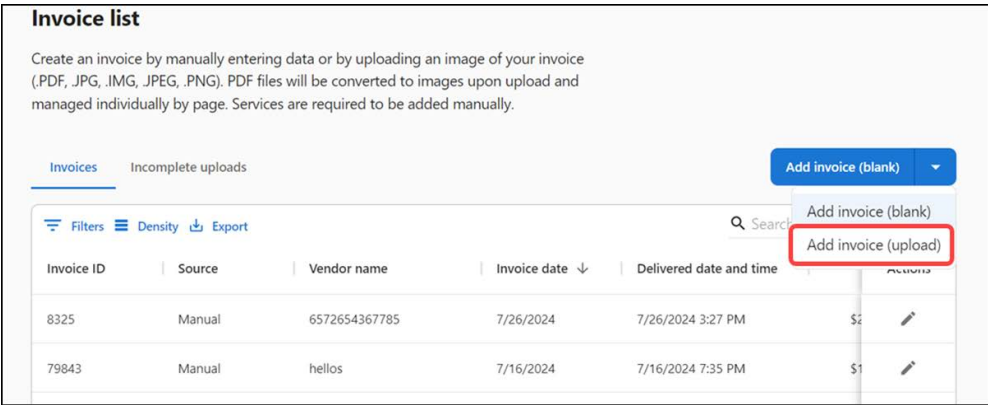
Tip

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

Please upload non-PDF images that are related to the same invoice. Only 1 image can be uploaded at a time. Please convert any PDFs into image formats (.JPG, .IMG, .JPEG, .PNG) to upload here.

Page 1:



Add page +

Cancel

Proceed

'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.

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

Invoice upload validation

1 Invoice info mapping 2 Page column mapping 3 Review rows 4 Invoice totals

Step 1: Invoice information mapping

[How to map invoice information](#)

Please make sure the identified information has been associated to the correct invoice data before moving to the next step:

(* Indicates required fields)

Invoice date * 07/06/2024

Cancel Continue to step 2

Item code	Name / Description *	Container *	Pack *	Size *	Unit *	Price *	Raw Item	Actions
ThirdItem	ThirdName	Bag (BG)	20	9	Gram (g)	2,343.00	Squab	
Second...	SecondName	Pal (PL)	4	20	Quart (qt)	1,001.00	Chicken	
FirstCode	FirstName	Case (CS)	5	10	Gram (g)	234.00	Apollo Fish	

3 rows selected 1-3 of 3

'Invoice upload validation' screen

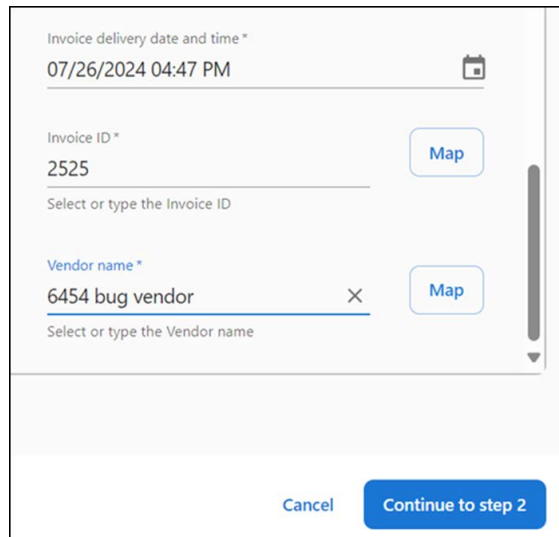
- Continue to [Mapping invoice information](#) to begin the process of validating the uploaded invoice.

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 upload validation' with the following fields and controls:

- Invoice delivery date and time ***: 07/26/2024 04:47 PM (with a calendar icon)
- Invoice ID ***: 2525 (with a 'Map' button)
- Vendor name ***: 6454 bug vendor (with a 'Map' button and a close 'X' icon)

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**.

The screenshot shows the 'Invoice upload validation' window with a progress bar at the top indicating four steps: Invoice info mapping, Page column mapping, Review rows (current), and Invoice totals. The main area displays a table with columns: Item code, Name / Description, Container, Pack, Size, Unit, Price, Raw Item, and Actions. Three rows are highlighted in yellow. To the right, a panel titled 'Step 3: Review row information' contains instructions: 'How to map invoice rows' and 'Please review the information and make edits if necessary before proceeding to the next step:'. A red box highlights a message: '4 rows require additional details. Use the row drop down navigation to review the incomplete rows before completing Step 4.' At the bottom right are 'Back' and 'Save and continue' buttons.

'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

Manage images Delete invoice

Invoice info mapping Page column mapping Review rows Invoice totals

11/6/23, 11:34 AM NCR Aloha Smart Manager

Filters Search Name

Item code	Name / Description *	Container *	Pack *	Size *	Unit *	Price *	Raw Item	Actions
ThirdItem	ThirdName	Bag (BG)	20	9	Gram (g)	2003.00	Squab	
Second...	SecondName	Pail (PL)	4	20	Quart (qt.)	1,001.00	Chicken	
FirstCode	FirstName	Case (CS)	5	10	Gram (g)	234.00	Apollo Fish	

3 rows selected 1-3 of 3

Step 4: Invoice totals

Review the totals, remember the system might not be able to capture all of the details, you will be able to adjust and apply changes once the draft invoice is generated.

Total (as calculated by the system) 200.00

Subtotal 200.00

Tax 0.00

Total (as used on invoice) 200.00

Back Create Invoice

‘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.

Invoice details Draft Delete invoice

* Indicates required fields Last edit was 7/26/2024 by acct:commerce@00uepuczdx5iwzt1d7-lm185162@ncr.com

Invoice information

Invoice date * Invoice delivery date and time *

Invoice ID * Invoice comments

Vendor information

Vendor name *

'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, User Guide

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