NCR VOYIX

Aloha Smart Manager User Guide

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Contents

Getting started with Aloha Smart Manager 1
Signing in and logging out of Aloha Smart Manager 2
Switching between apps 5
Working with the dashboard 6
Working with your account 9
Configuring and using notification settings 13
Navigating the Help function 20
About labor management 21
Working with employees 22
Working with schedules 41
Viewing employees on a shift 53
Working with punches 54
Working with labor reports 66
About inventory management 88
Managing units of measure (Inventory Core only) 89
Working with raw items 97
Working with vendors 106
Working with vendor items 110
Working with invoices 118
Viewing 'Invoice history' report 126
Managing recipes (Inventory Core only) 129
Viewing and mapping sales items (Inventory Core only) 135
Viewing modifier groups (Inventory Core only) 137
About sales reporting 139
Working with Sales reports 142
Viewing transactions 172
Viewing POS event log 175
Managing company links 178
Viewing the Activity Log 182
About Settings 185
Working with 'Organization settings' 186
Working with 'Site settings' 189
Working with 'Labor settings' 195
Appendix A: Bulk importing vendors and vendor items 213
Uploading vendors in bulk 213
Uploading vendor items in bulk 217
Appendix B: Uploading an invoice 224
Uploading the invoice details 224
Mapping invoice information 227

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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.

This guide includes content for both Starter and Inventory Core.

Starter capabilities

The Starter package of Aloha Smart Manager offers essential tools for streamlined operations, allowing you to spend less time in your back office and more time in front of your guests:

- Labor management: Optimize staff scheduling and labor costs.
- Inventory management: Keep track of stock levels and reduce food waste.
- Staff scheduling: Ensure the right staff are in the right place at the right time.
- Sales reporting: Gain insights into your sales and employee performance.

Inventory Core capabilities

The Inventory Core solution streamlines restaurant inventory management and operations. Together, these capabilities empower operators to make data-driven decisions, reduce waste, and drive profitability across their restaurant operations.

- Managing units of measure
- Managing recipes
- Viewing and mapping sales items
- Viewing modifier groups

Things you need to know when getting started with Aloha Smart Manager

- Signing in and logging out of Aloha Smart Manager
- Switching between apps
- Working with the dashboard
- Working with your account
- Configuring and using notification settings
- Navigating the Help function

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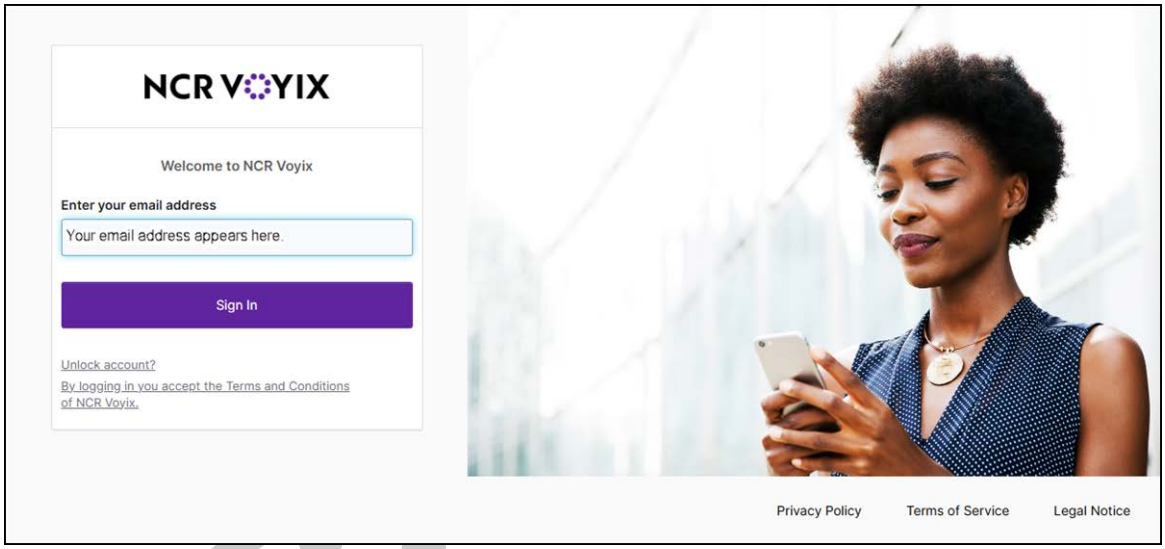
Signing in and logging out of Aloha Smart Manager

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

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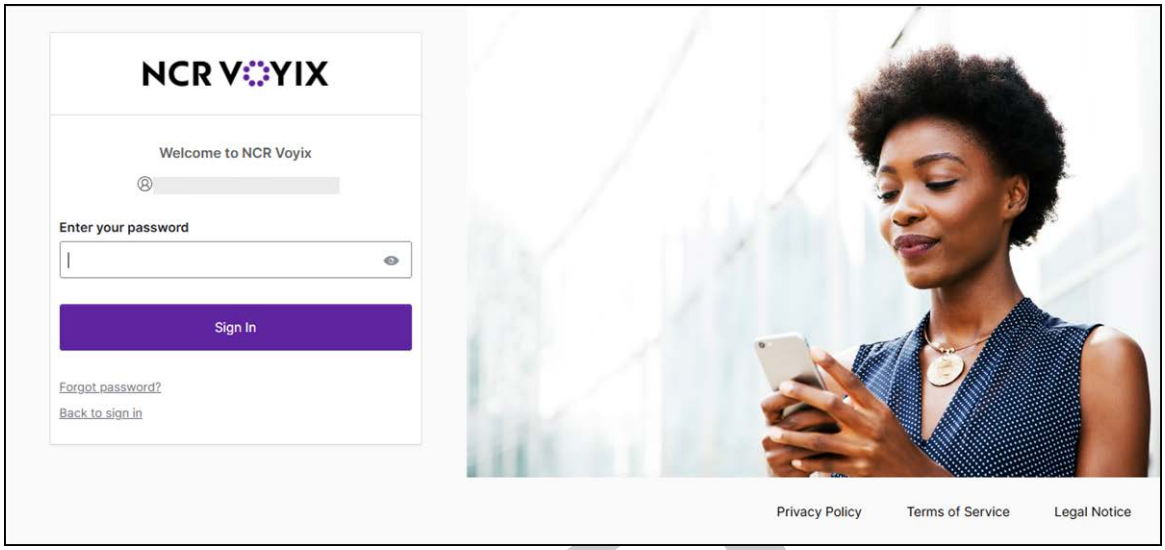
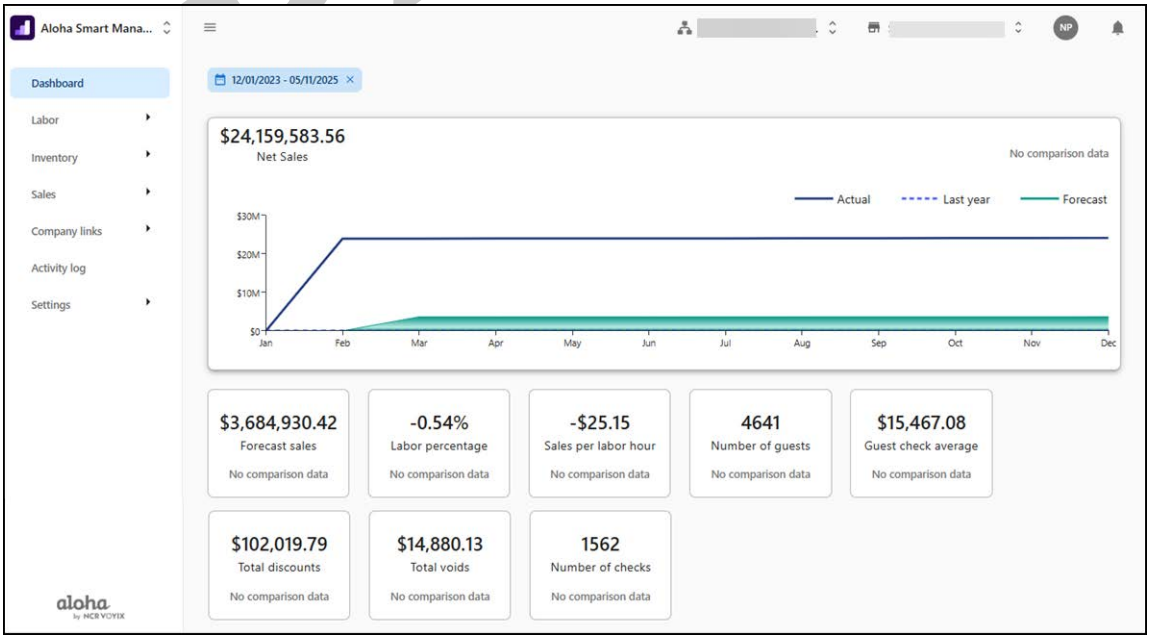
2. Verify the **email address** that appears is correct and click **Sign In**.



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

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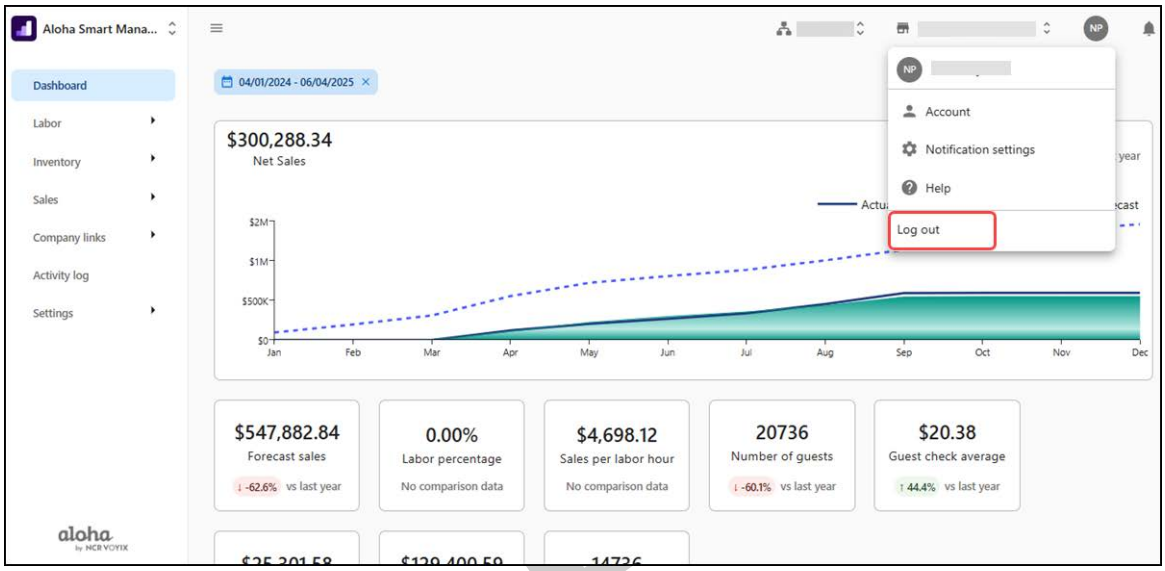
To log out of ASM:

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



Logging out of ASM

2. Click **Log out**.

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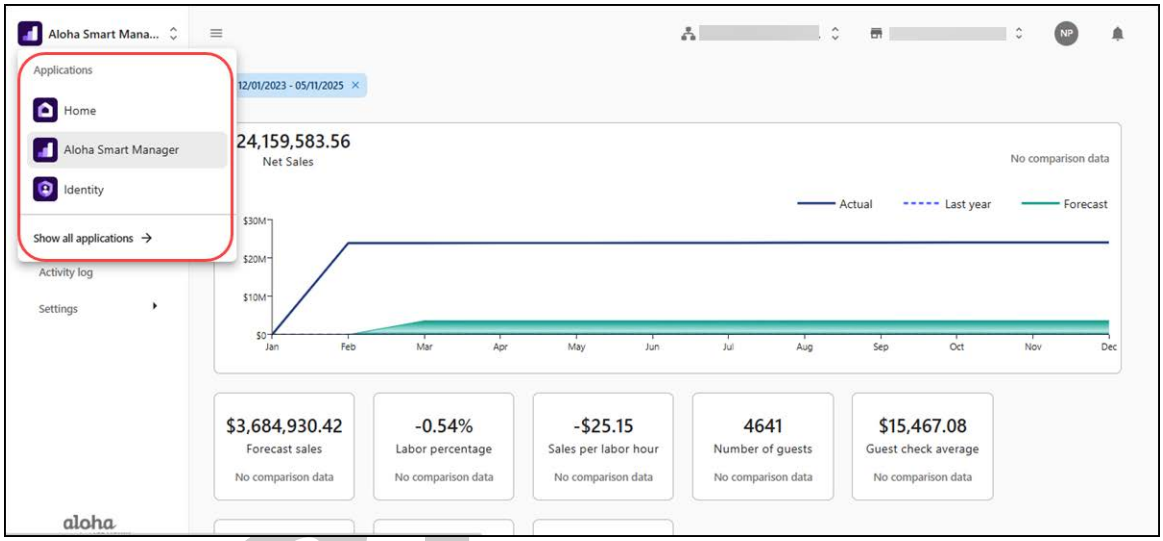
Switching between apps

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.

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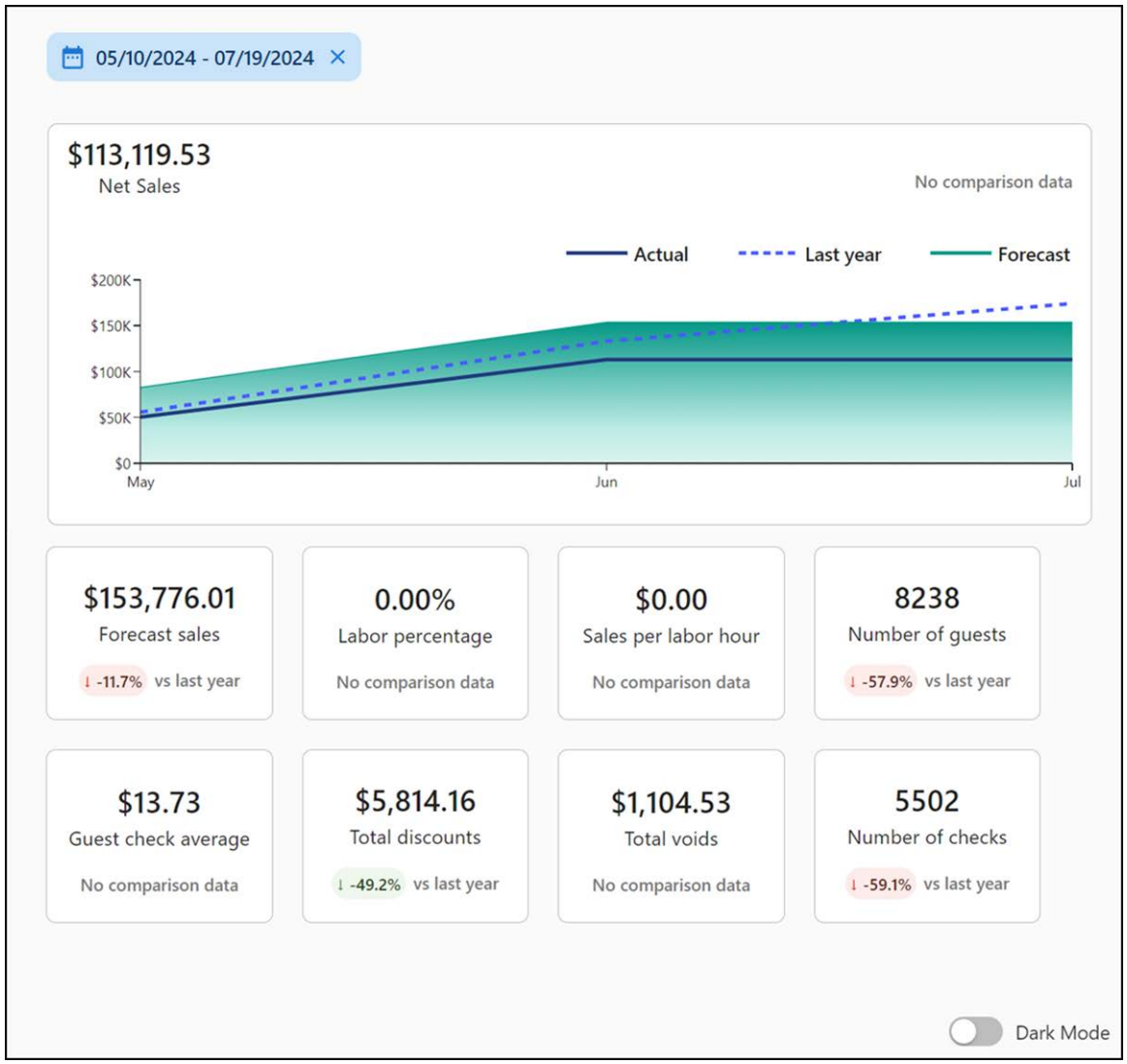
Working with the dashboard

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



ASM dashboard

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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.

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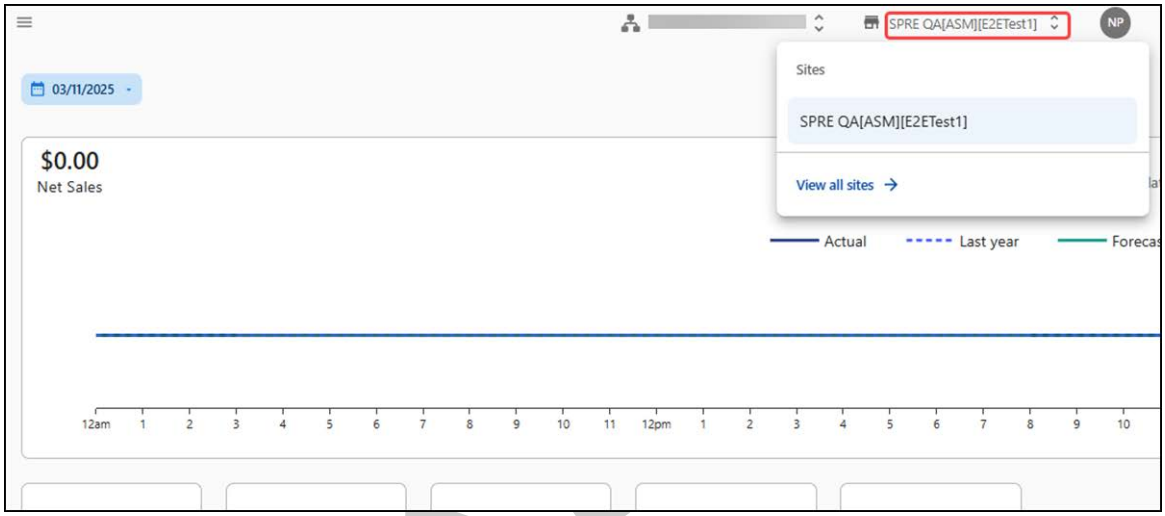
Changing the site

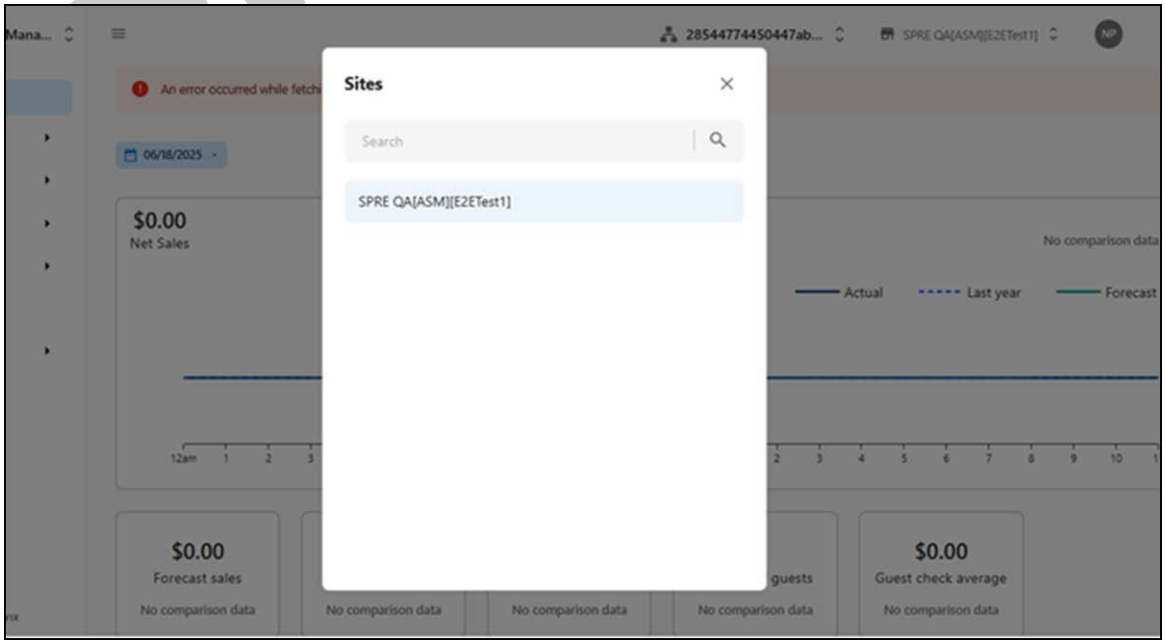
The dashboard displays for the default site assigned to you. If you use a multi-store account, you can easily switch from one site to another to view data and perform tasks within that site.

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

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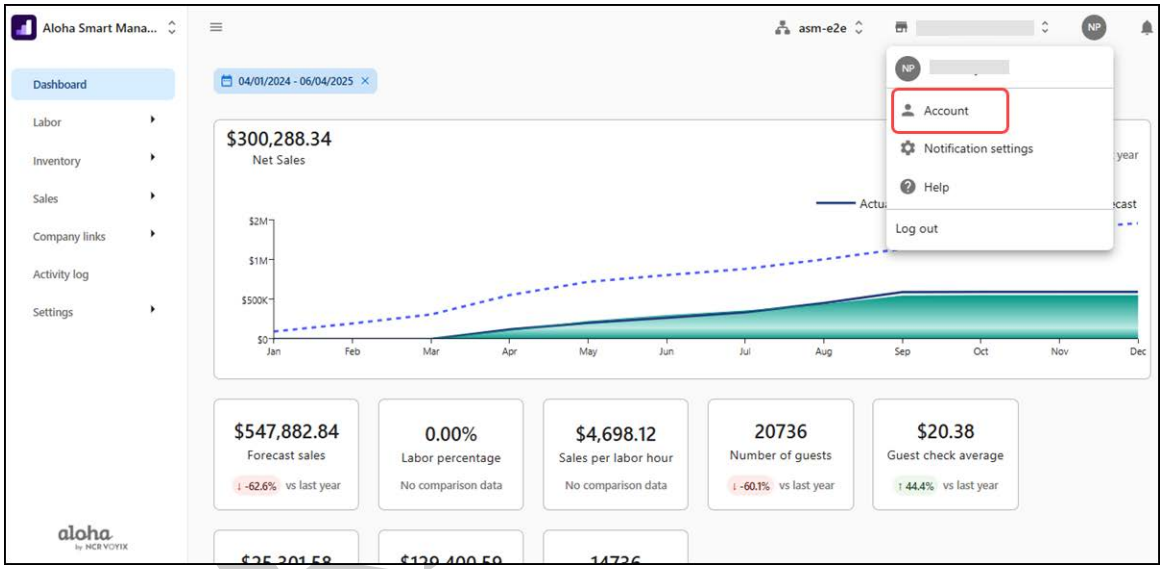
3. If needed, type the **site name** in 'Search' to narrow the list or select a **site** from the drop-down list. The dashboard refreshes to display the data for the selected site.

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.

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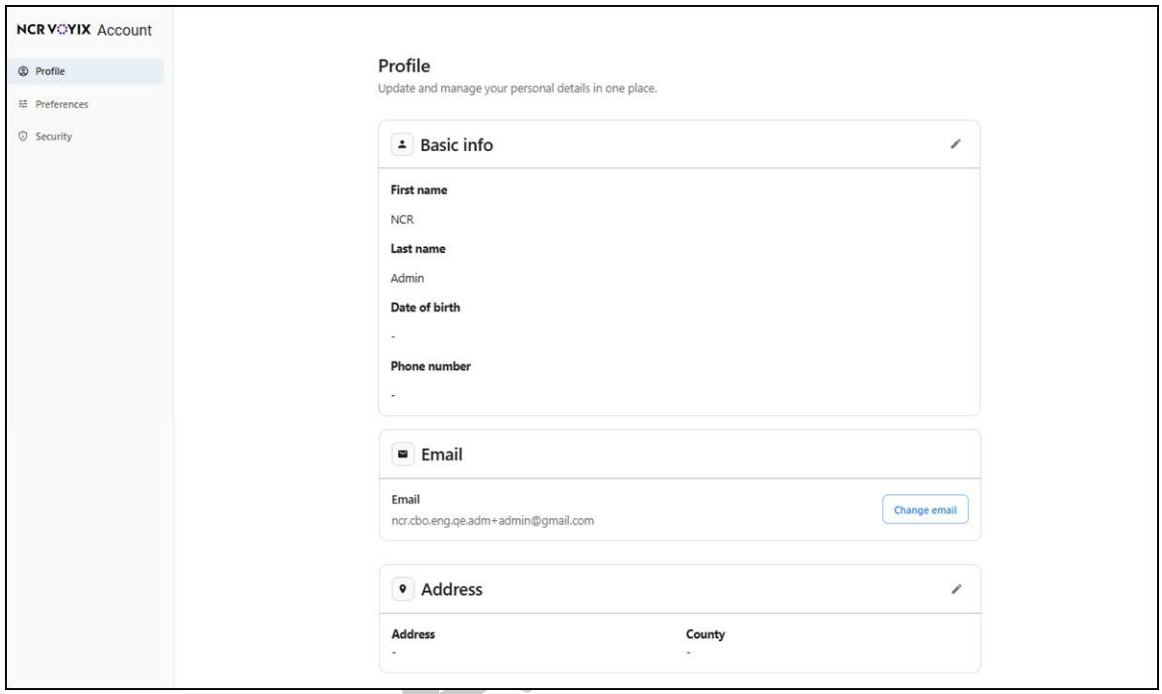
The Profile screen provides access to three pages: Profile, Preferences, and Security, as shown below. Use the options on these pages to make changes to your first and last name, phone number, email address, display options, login credentials, and more.



Edit the Profile page

To update your account profile:

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

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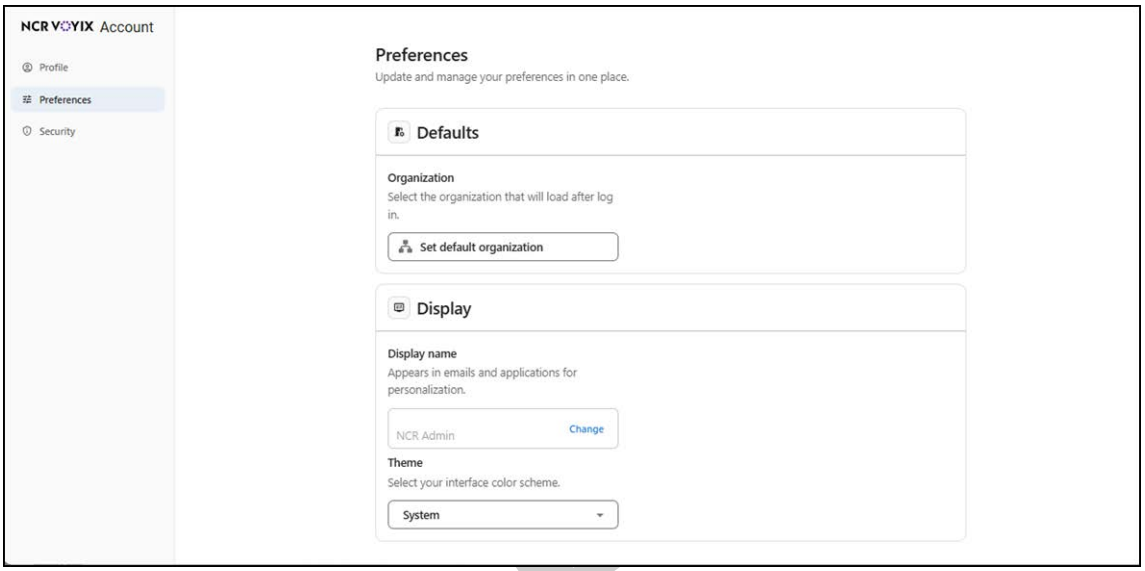
To update your account preferences:

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



Edit the Preferences page

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

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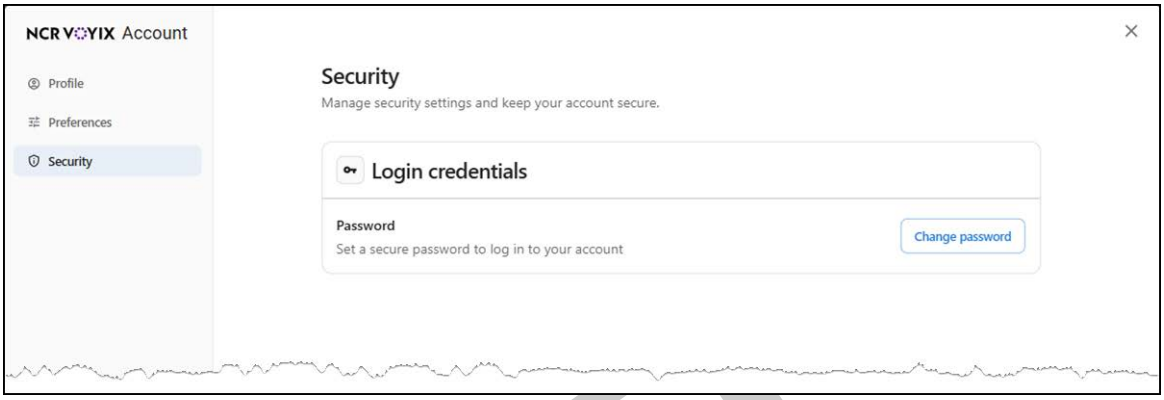
Continue to the **next procedure** or click **X i**n the top right corner of the screen to exit the **Account** function.

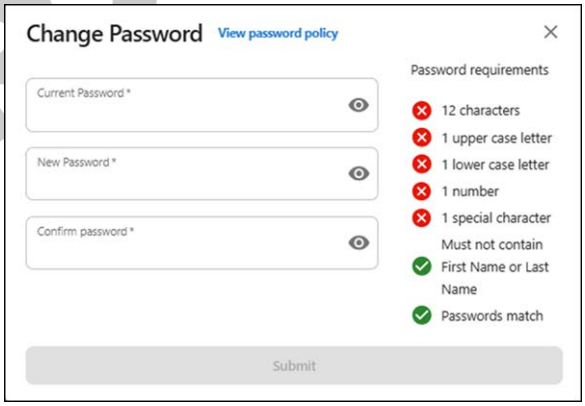
To update the password to use when logging in to ASM:

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



Edit the Security page

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



Change Password screen

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

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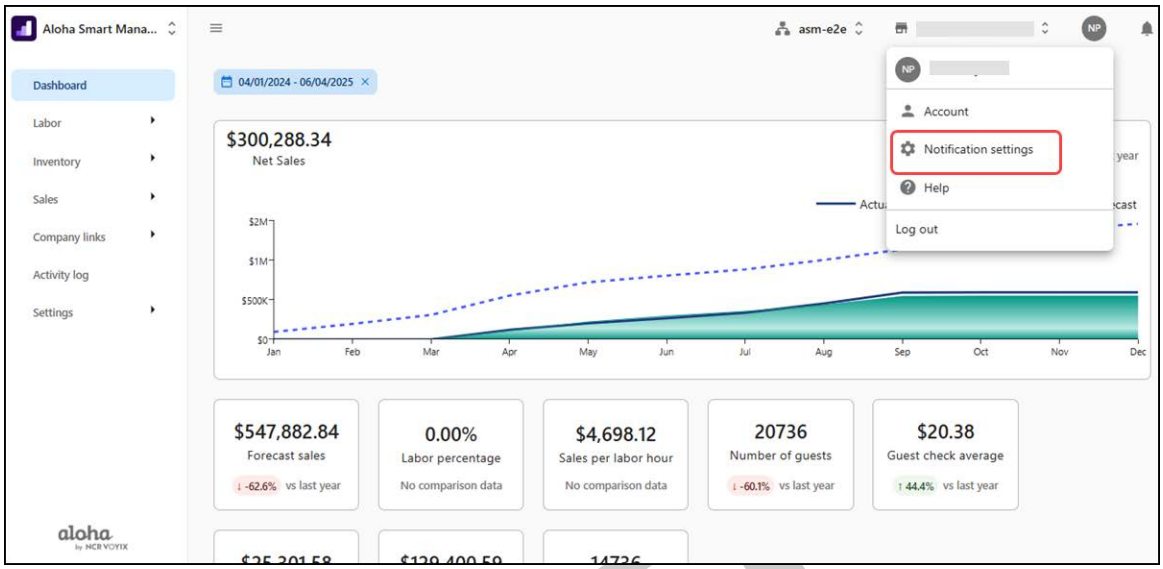
Configuring and using notification settings



'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.

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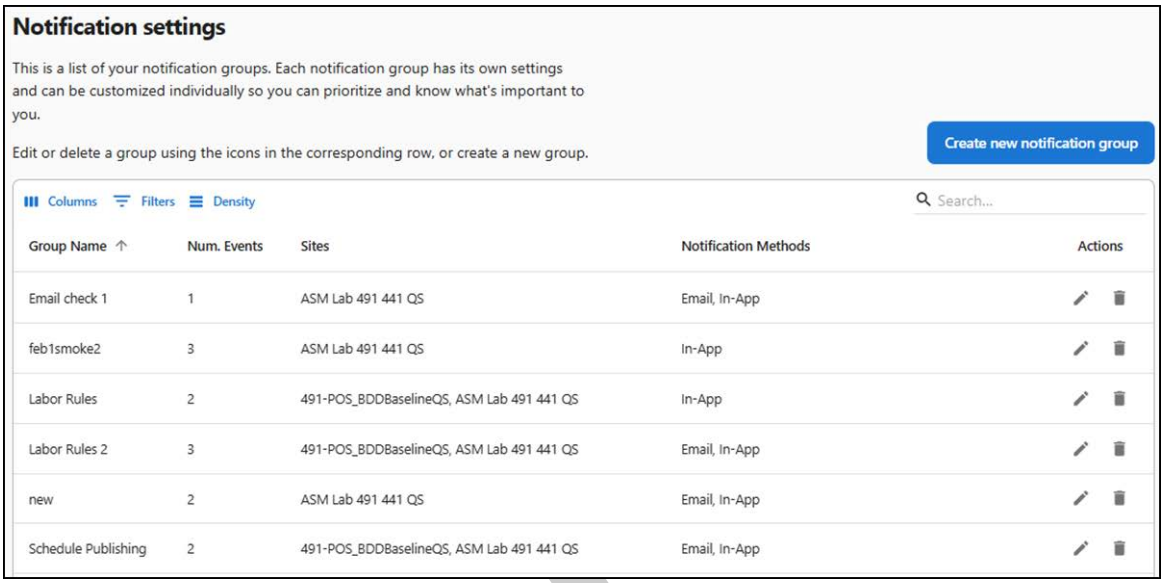
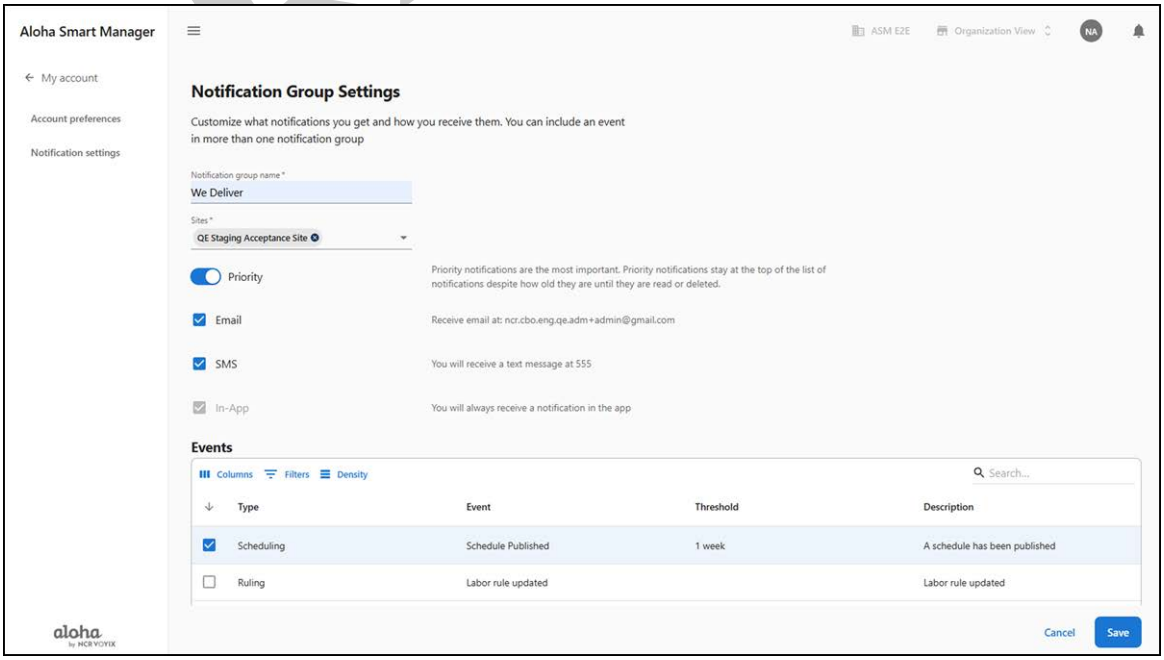
Configuring notification groups

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



'Notification settings' screen

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



'Notification Group Settings' screen

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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.

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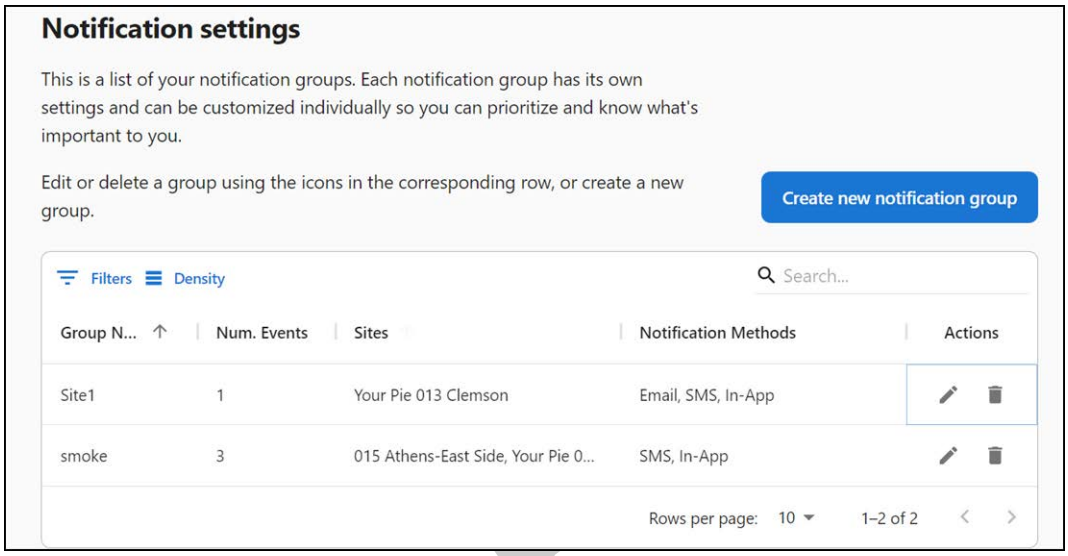
To edit or delete a notification group:

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.

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Viewing a notification sent to you

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

An in-app notification contains the following:

Priority — Indicates the severity of a notification as either normal or high priority. Use a normal priority for when the stock of an inventory item is running low and requires no action from the manager. Use a high priority for when an inventory item is completely depleted and a manager must mark the notice as read. High priority notifications always appear above all normal priority notifications.

Time — Indicates the time when the notification is received, such as 2m ago (two minutes ago) or 2d ago (two days ago).

Mark read — Indicates the notification is read without opening.

Mark unread — Indicates the notification is not read.

Delete — Deletes the notification.

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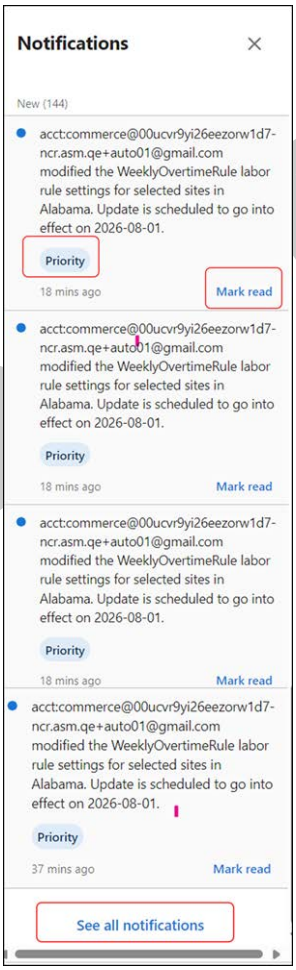
To view a notification:

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

Notifications Icon

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



Notifications Drawer

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

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

All notifications

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

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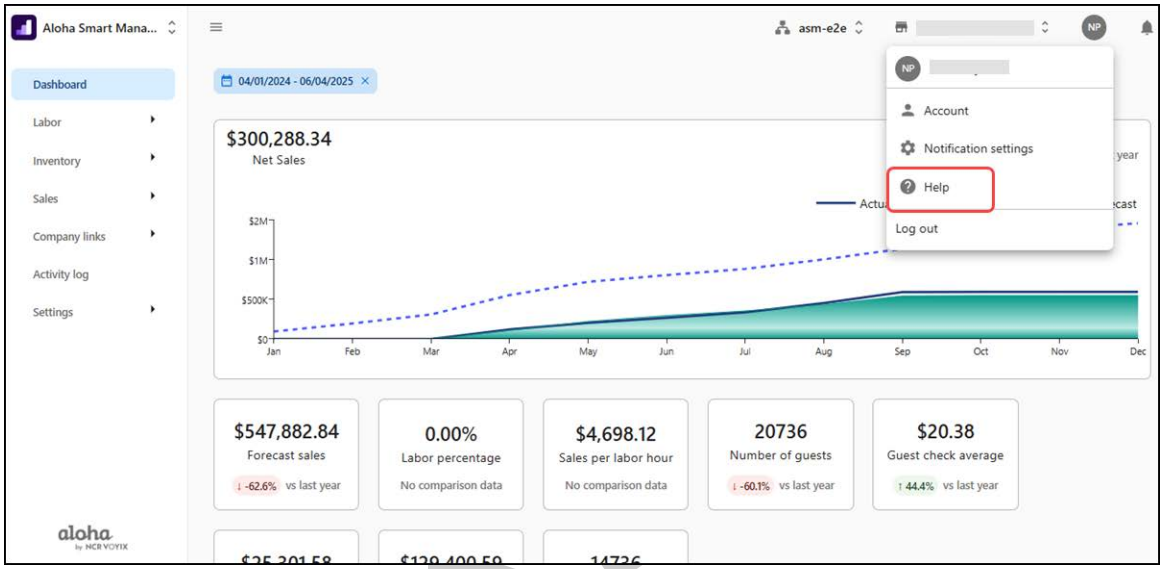
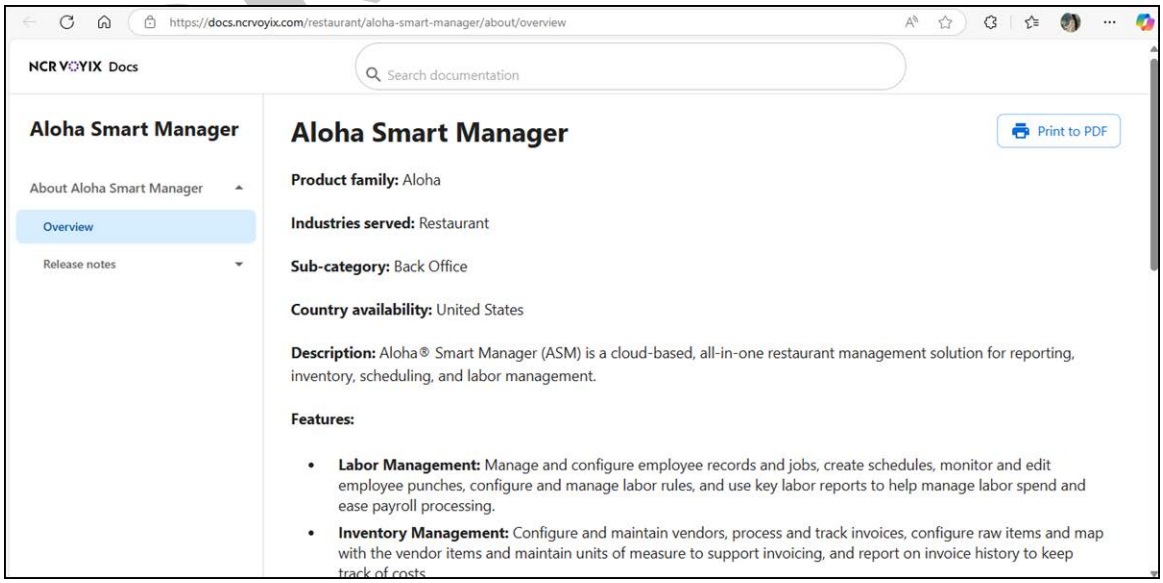
Navigating the Help function

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

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About labor management

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 are:

- Working with employees — Provides access to employee information, such as personal information and emergency contacts, and to assign jobs and pay rates to employees.
- Working with schedules — Creates schedules that balance employee availability and business needs to ensure adequate staffing levels are maintained while minimizing labor costs.
- Viewing employees on a shift — 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.
- Working with punches — 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.
- Working with labor reports — Provides a report that allows you to view the employees at risk of working overtime for the scheduled week and another report that allows you to view employee payroll information for a selected pay period.

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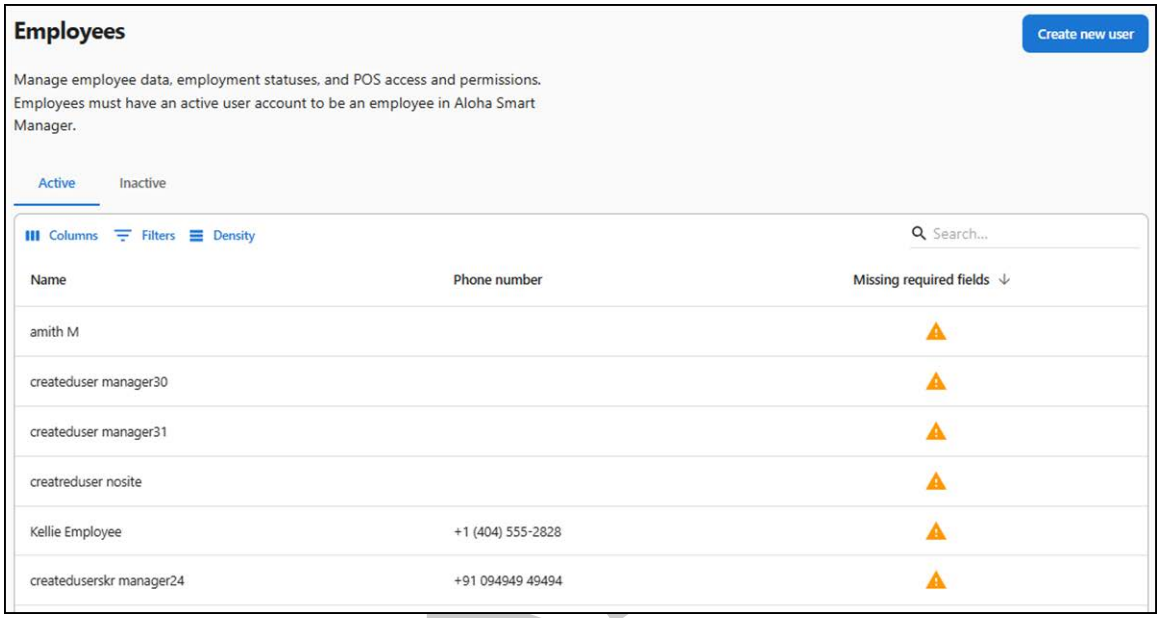
Working with employees

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



'Employees' screen

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

Active tab — Appears by default and displays employees who are actively working in the restaurant. An employee becomes Active only after the manager approves the employee profile in the system.

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

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

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

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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.

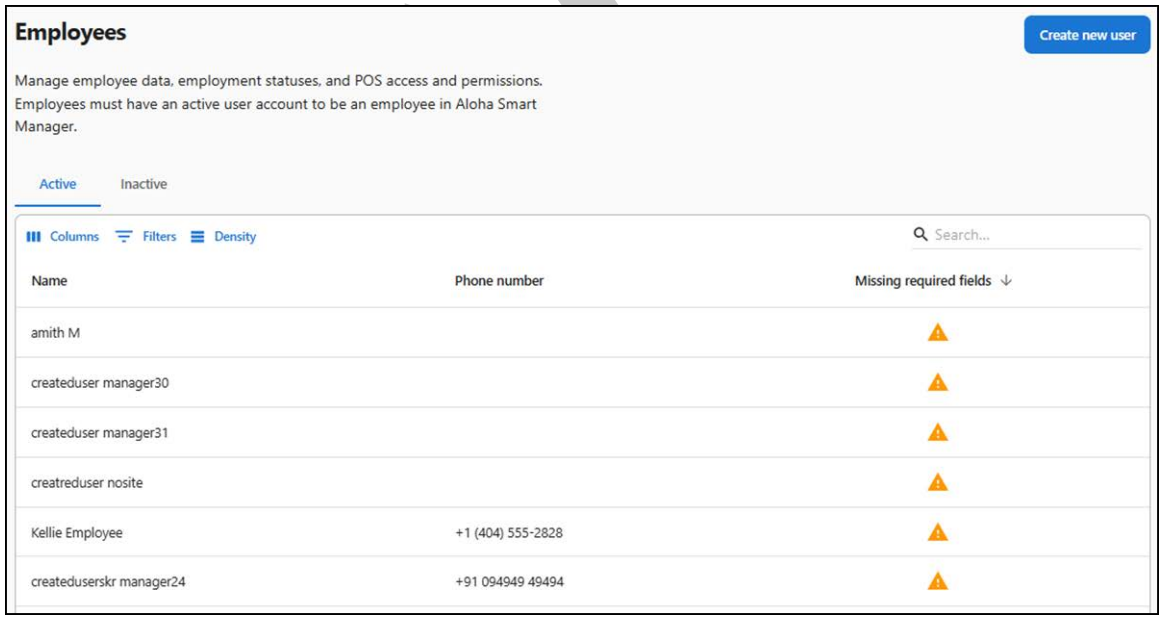
Step 1: Hiring manager creates a new employee.

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' 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.

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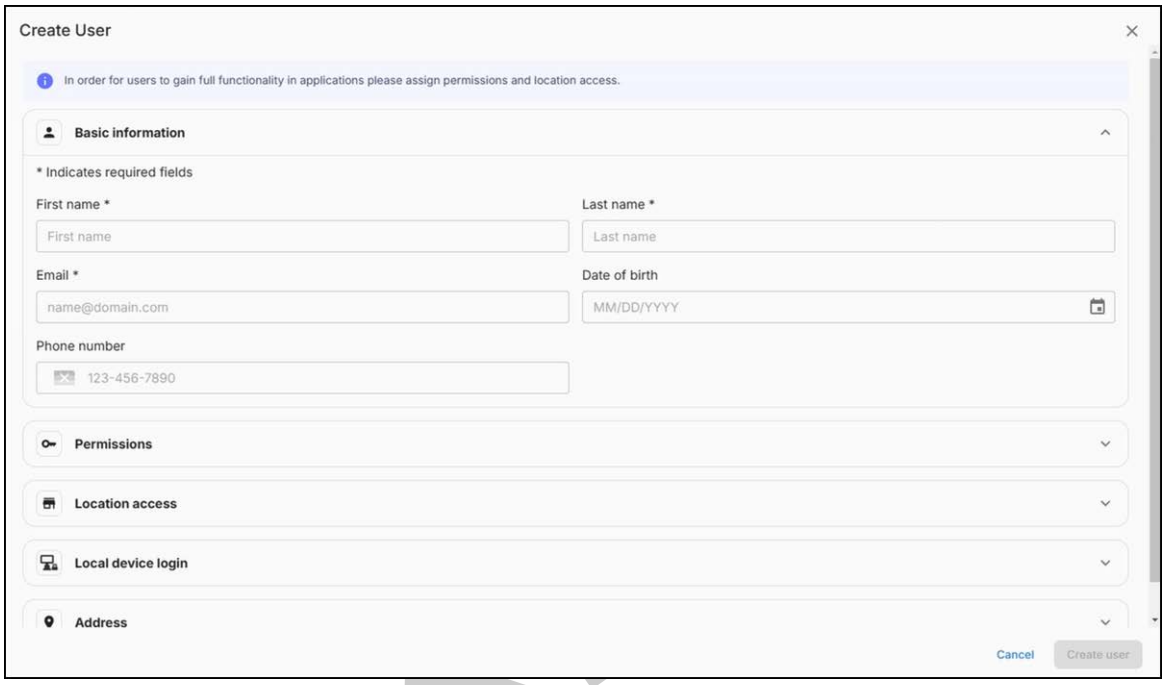
4. Click **Create new user** to display the 'Create User' screen with the 'Basic information' group bar expanded.



'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**.

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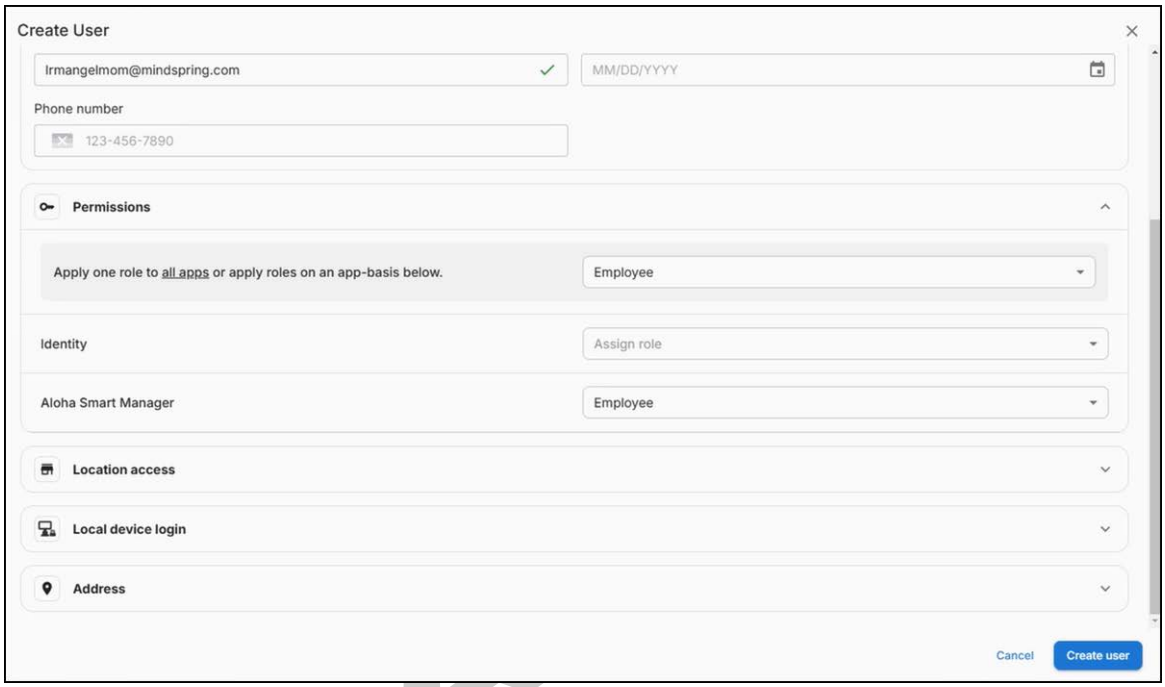
8. Expand the **Permissions group bar**. The hosted applications assigned to you appear. In the example below, you see Identify and Aloha Smart Manager. Use the Permissions group bar to establish the role for the user you are creating to perform for each of the hosted applications.



'Permissions' screen

9. 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.

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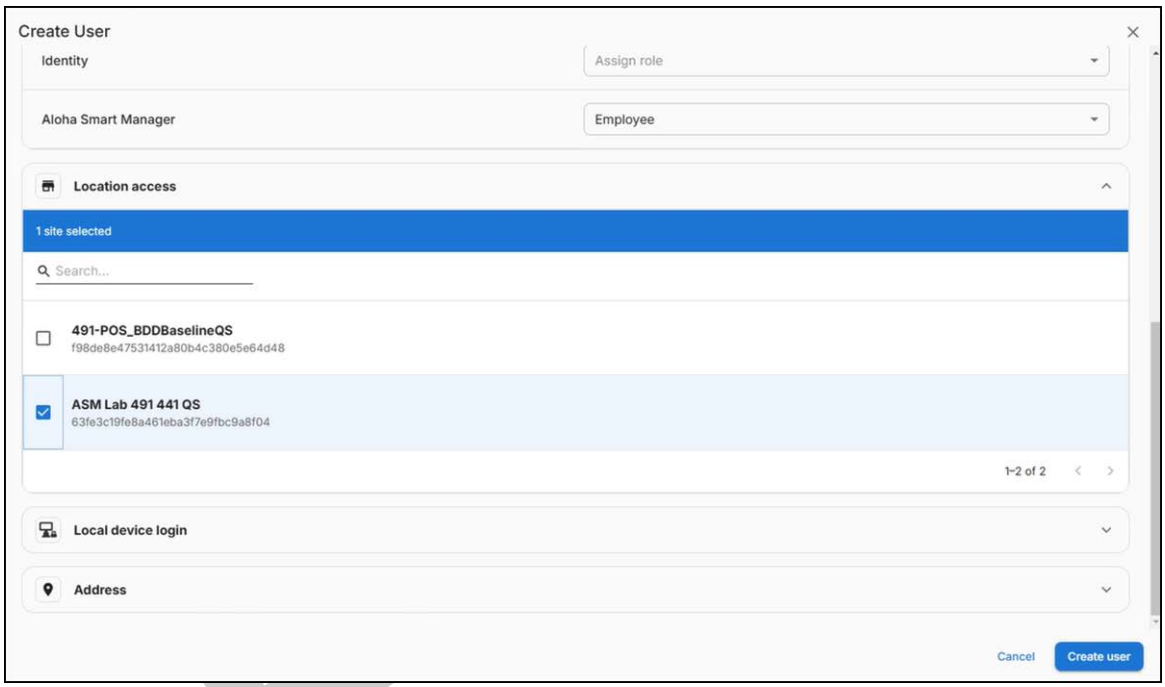
Important
ASM does not display the **Above Store Manager** user role in the Employee list or function as an ASM Employee. The user role will not have access to the POS.

10. Expand **Location access**.



'Location access' screen

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

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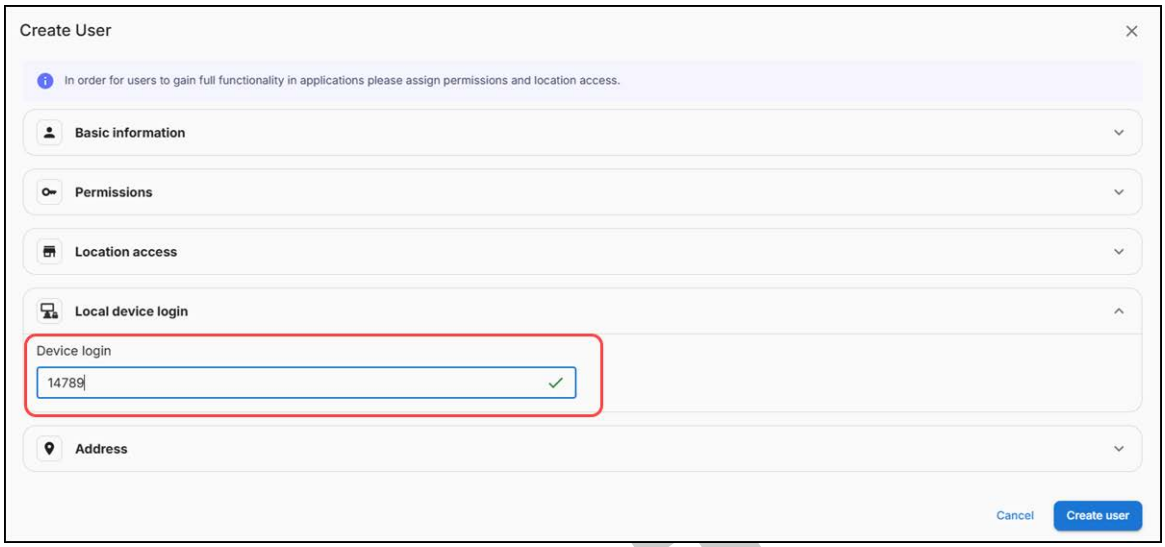
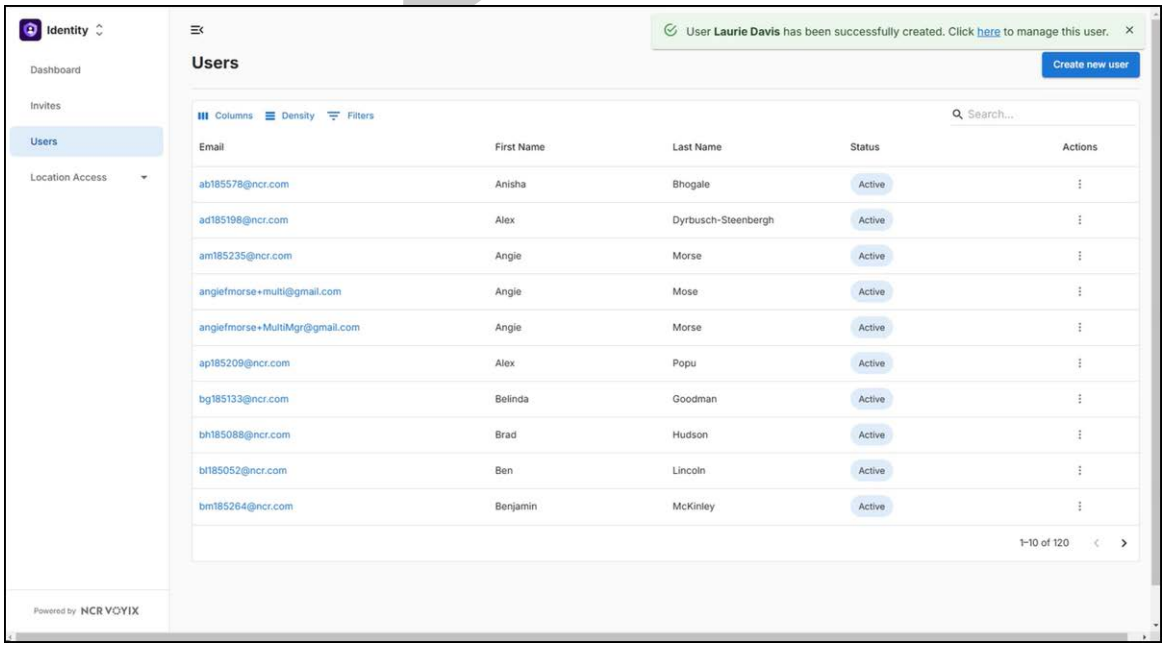
12. Expand **Local device login**.



Establish POS login PIN

13. Type the **unique PIN** for the employee to use when logging in to the POS into 'Device login.'
14. Click **Create user**. A success message appears.



'Create user' success message

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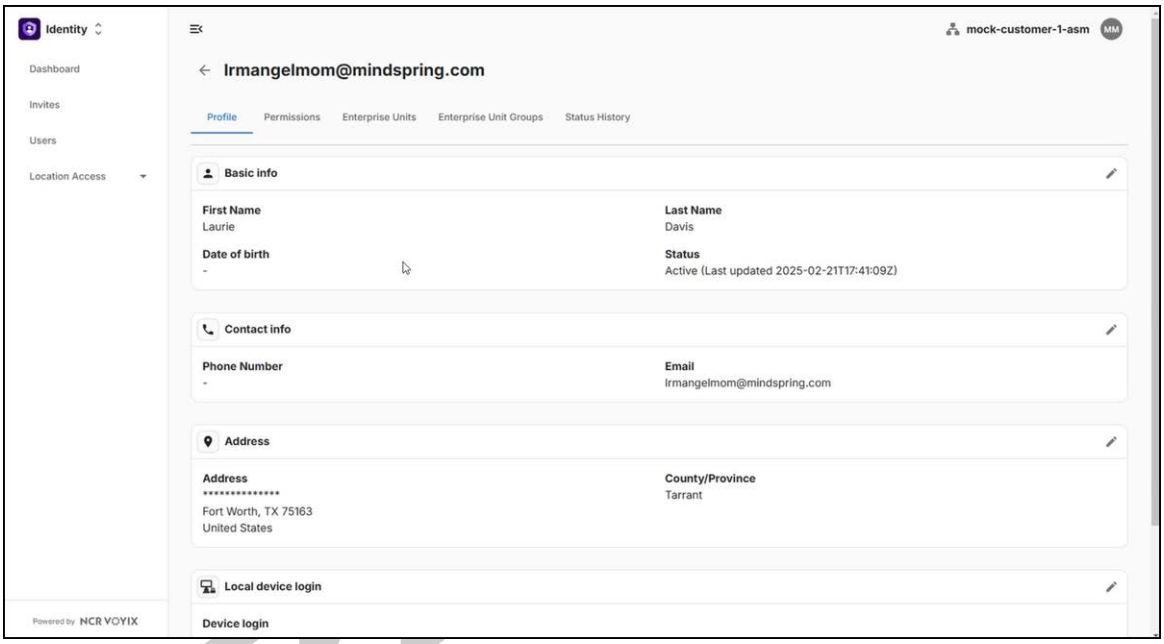
Note
If there is an existing employee with the same first and last name, a warning message appears when you attempt to save the new employee record.

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



Employee information summary screen

Upon submission, an email is sent to the provided email address with a link for the employee to enter their personal information and emergency contact details.

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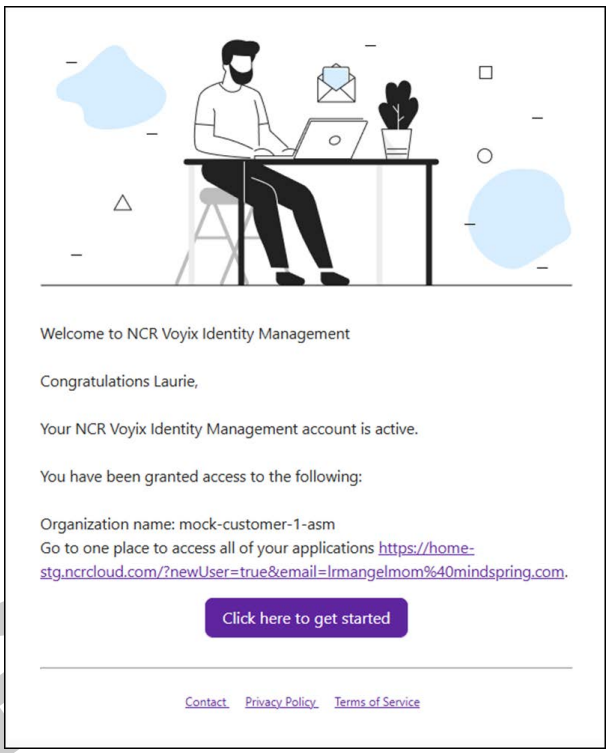
Step 2: Employee opens Welcome email and completes the new employee setup.

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.

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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

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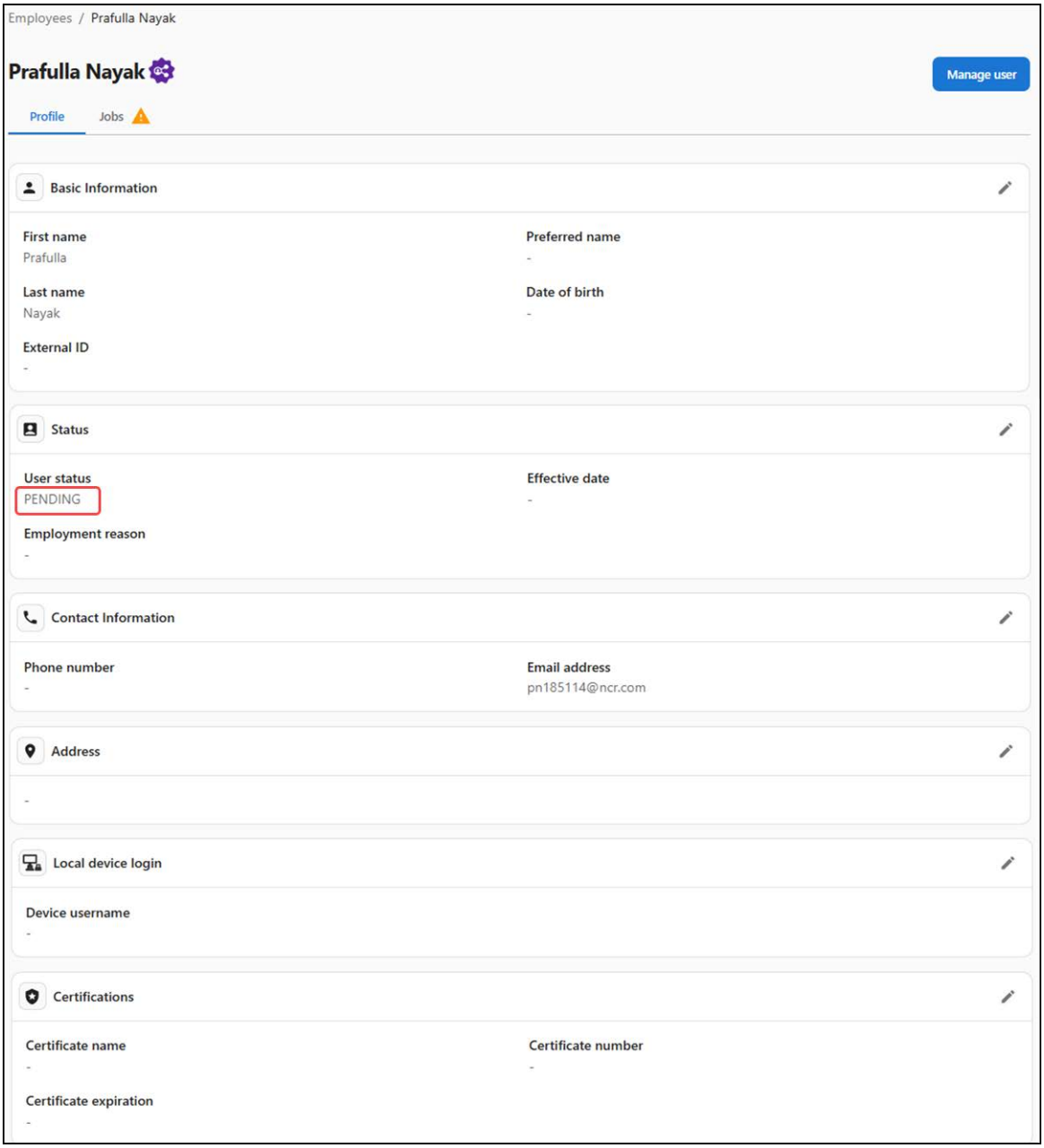
2. Click the **Caution icon** next to the employee in the list to display the 'Employees profile' screen.



Employee profile screen

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

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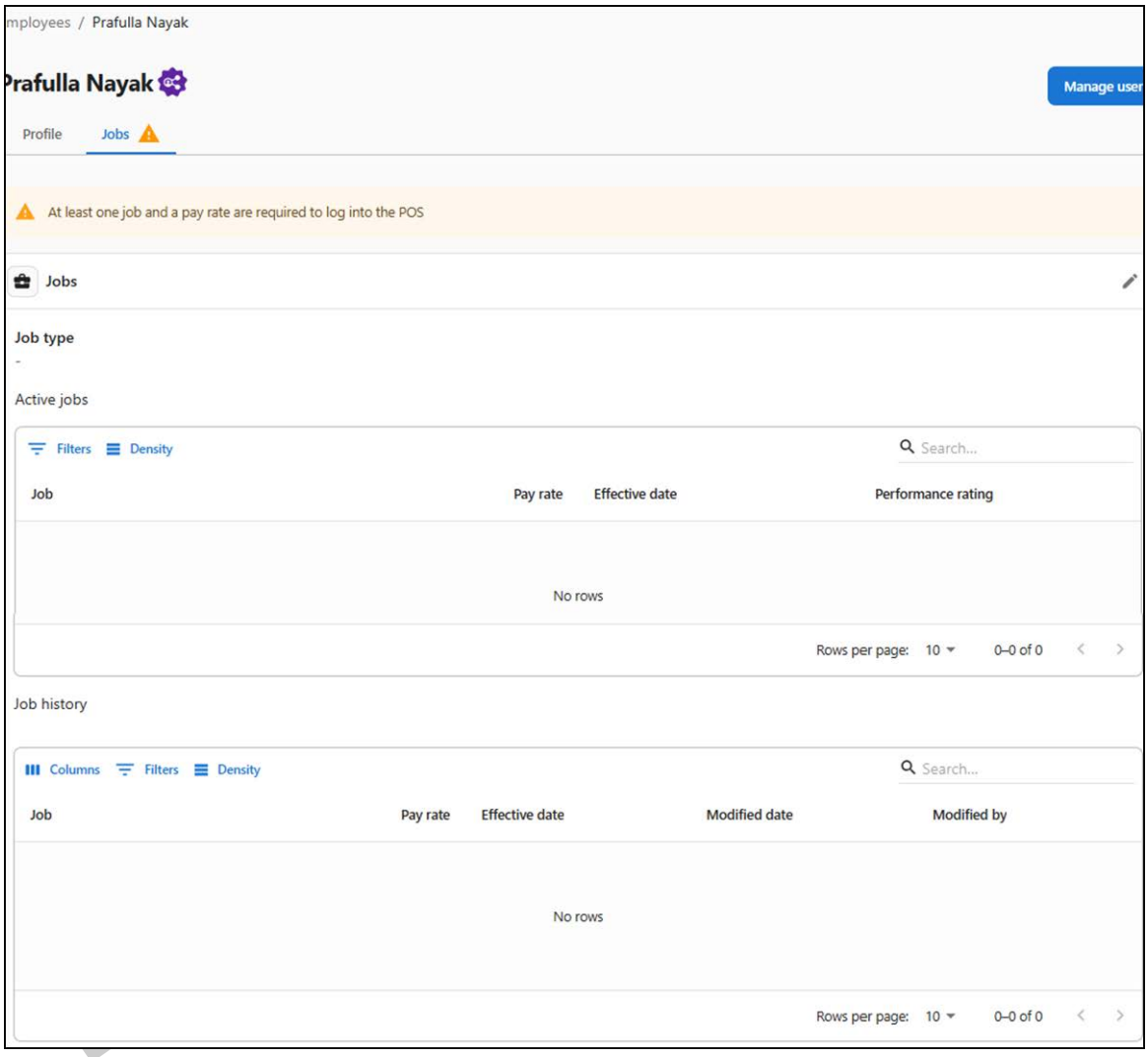
3. Select the **Jobs** tab under the employee's name. The **Jobs** screen appears.



'Jobs' tab

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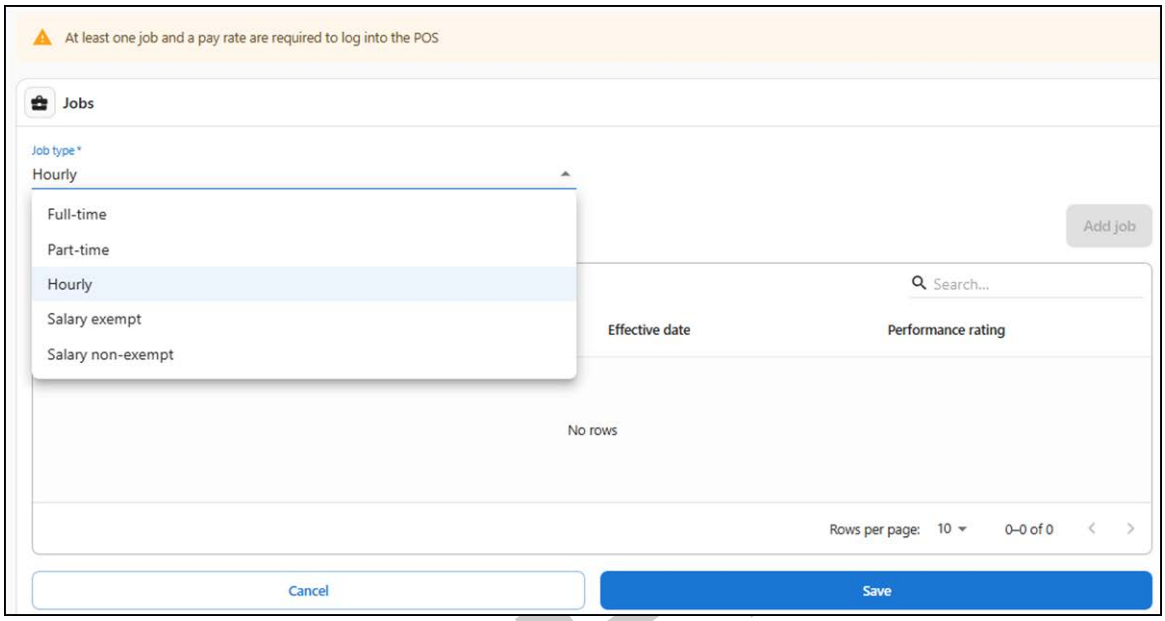
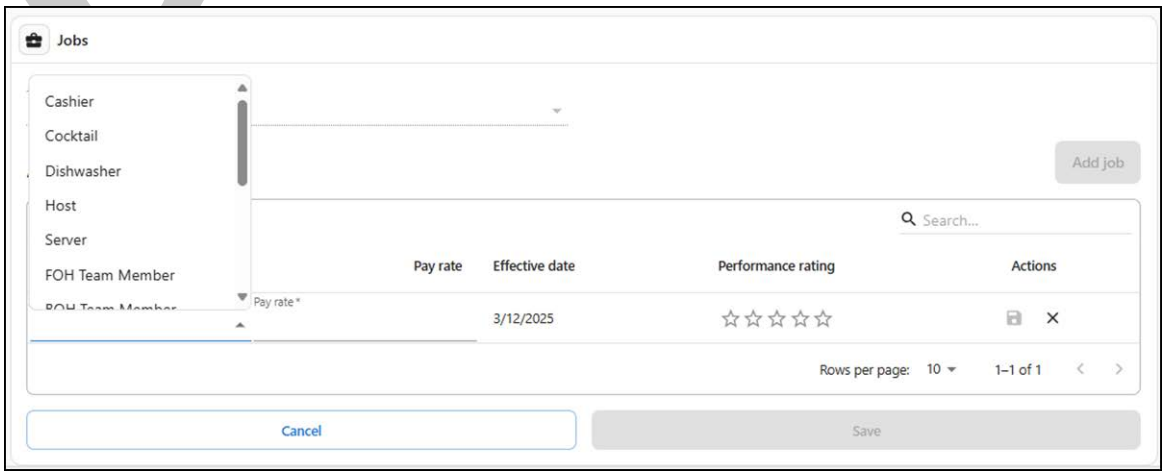
4. Click the **pencil icon** at the far right of the **Jobs** group bar.



Employee 'job type'

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



Employee 'Add job'

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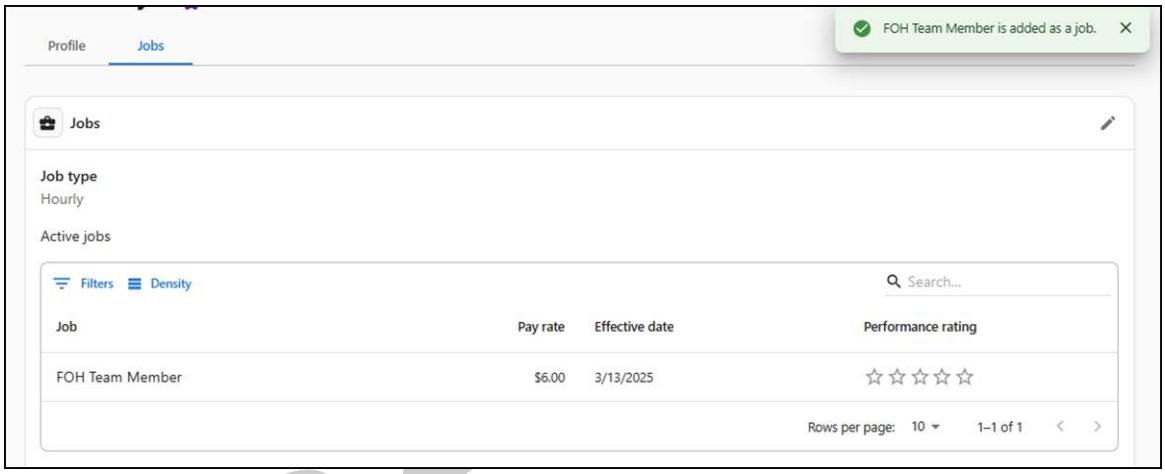
The **Active jobs** table appears with attributes like **Job**, **Pay rate**, **Effective date**, **Performance rating**, and **Actions**.

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 from an employee

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

To remove a job from an employee:

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

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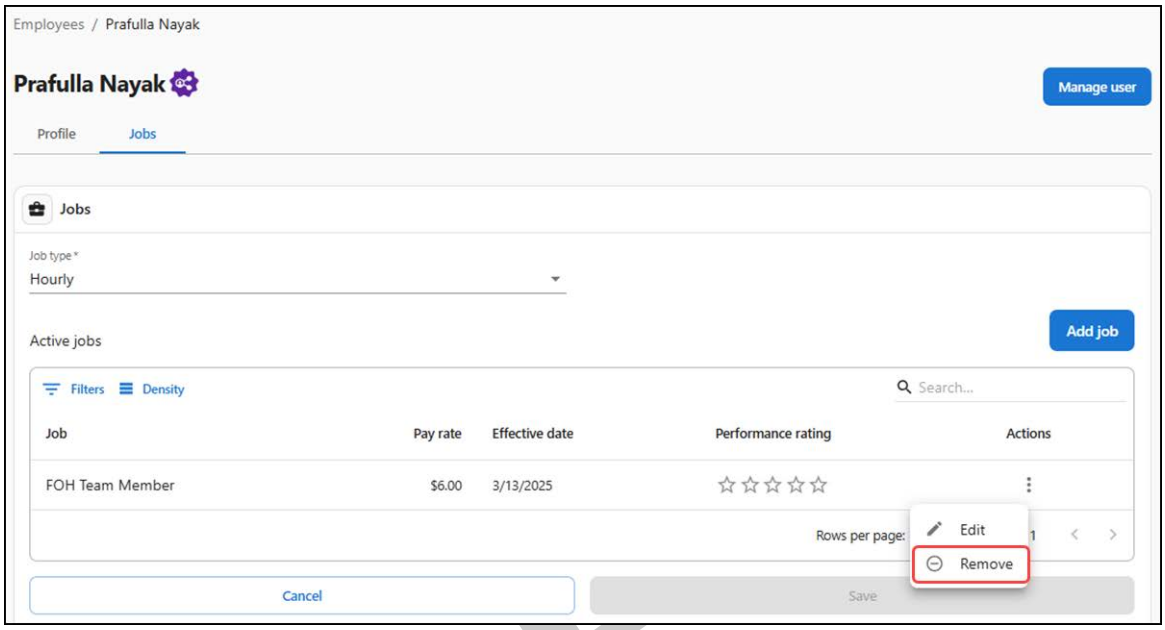
4. Click the **pencil icon** at the far right of the **Jobs** group bar.



'Jobs' screen

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

Remove job window

6. Click **Remove** to confirm.

Managing employee profile

Once you complete the Profile tab of the Employees screen, you can edit the information 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.

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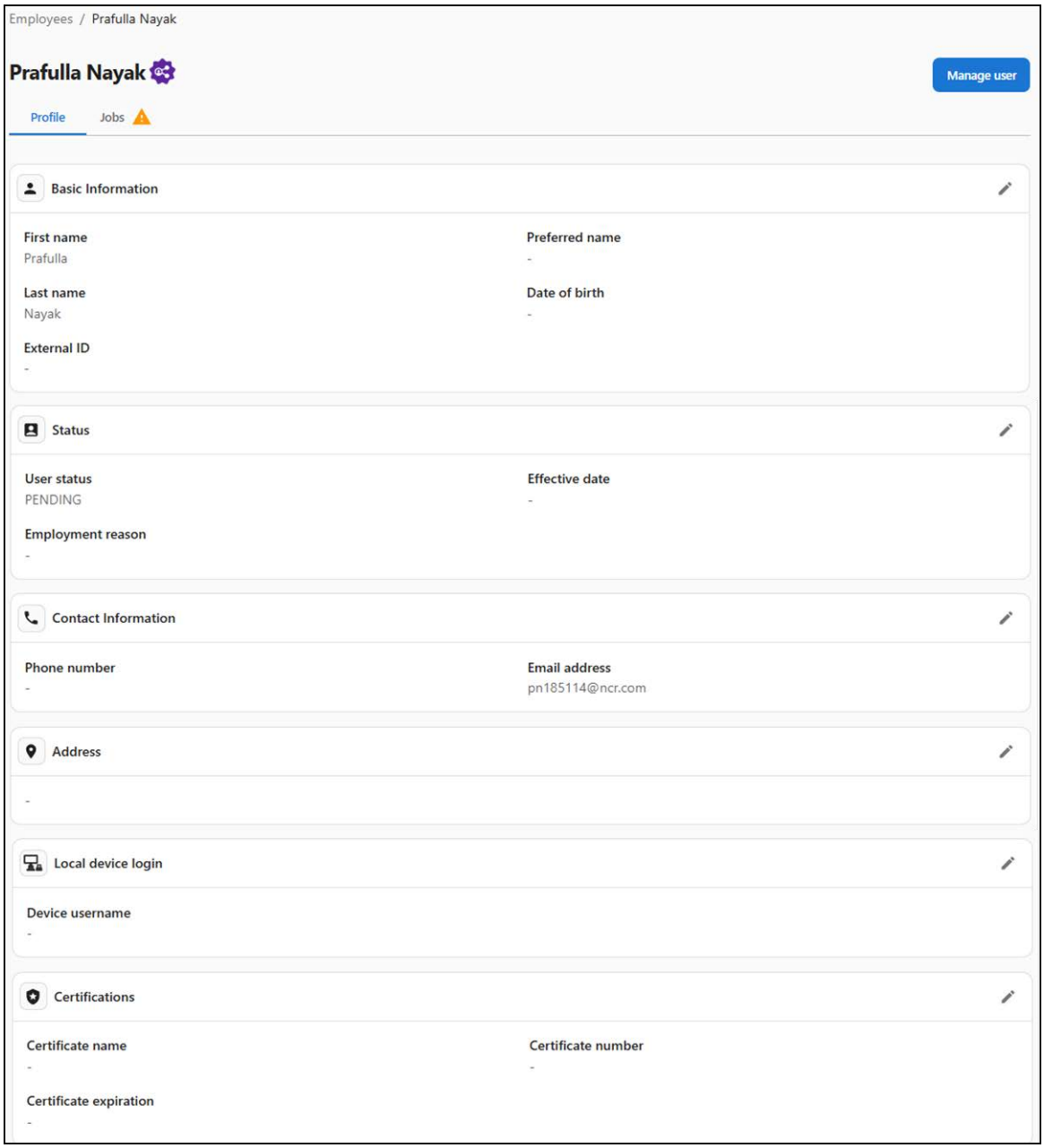

Employee profile screen

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.

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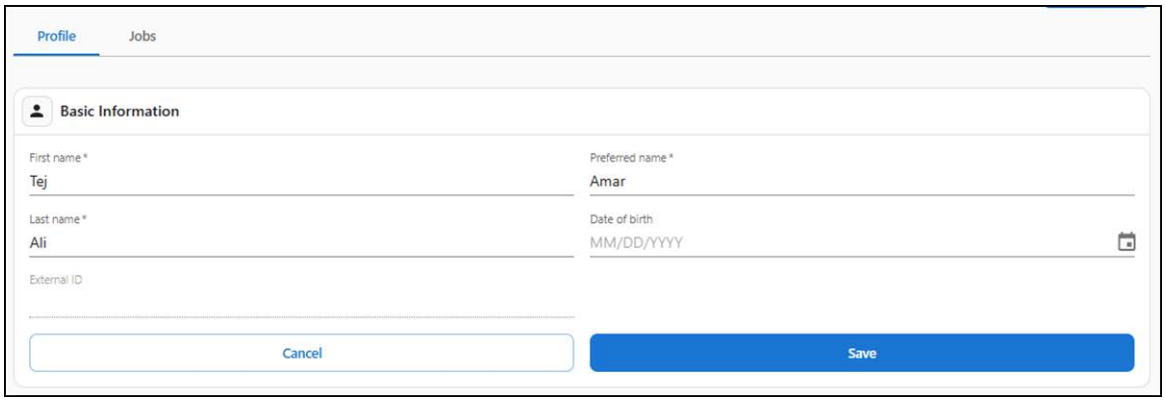
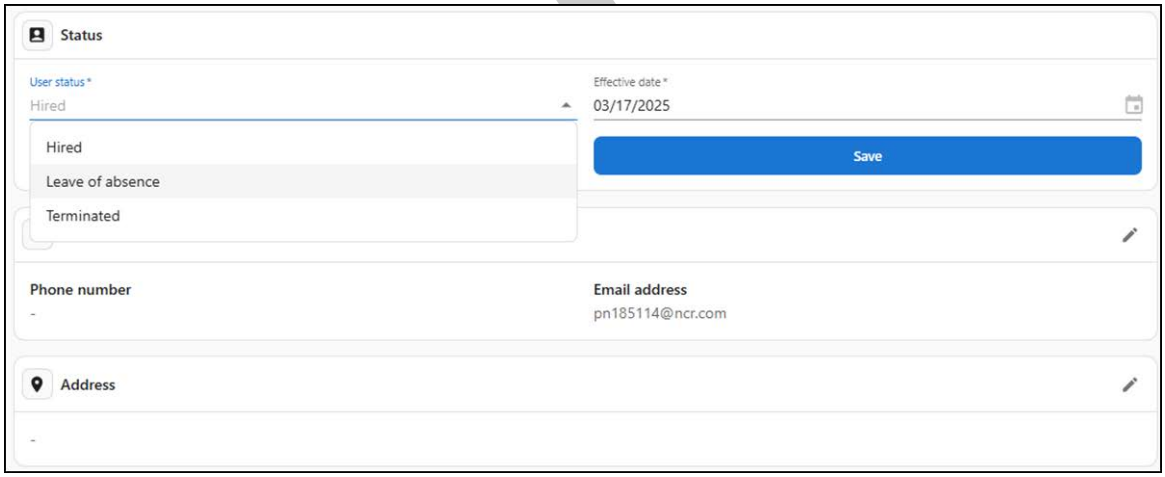
3. Click the **pencil icon** at the right end of the **Basic information** group bar.



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.**



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.

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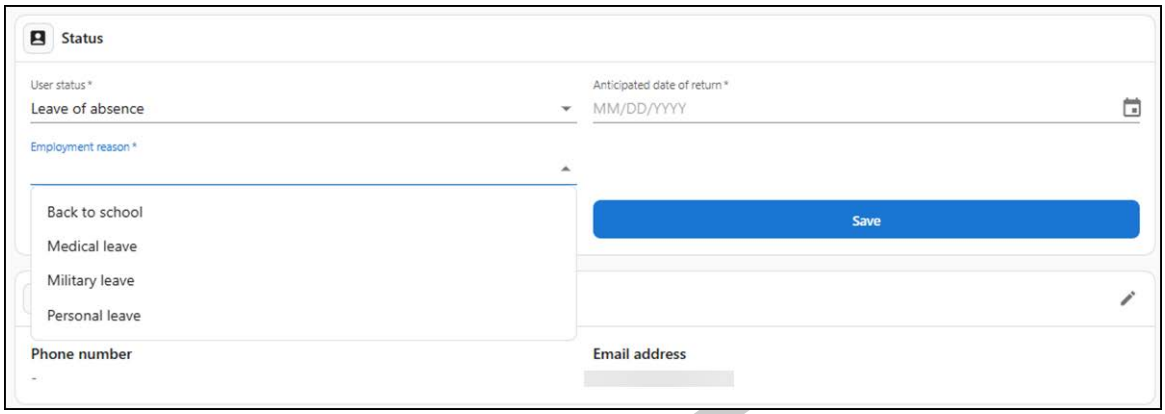
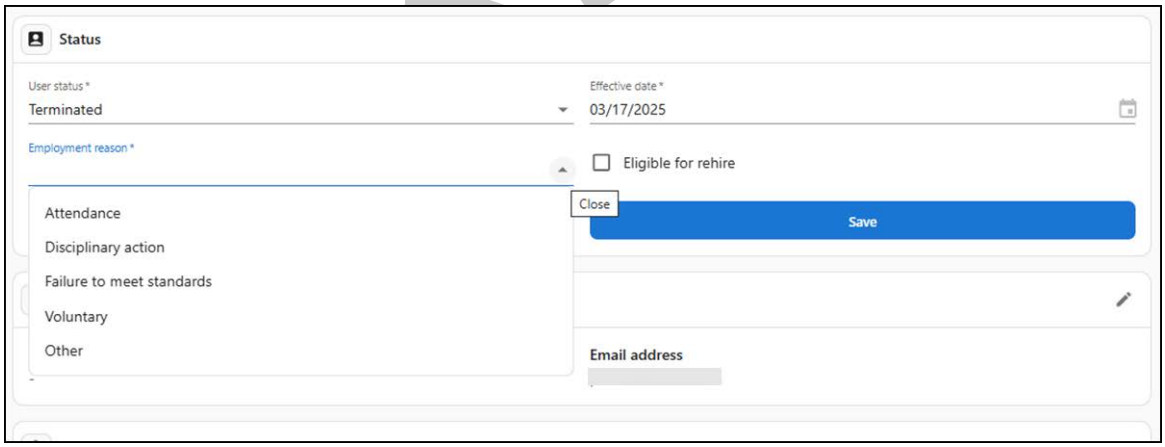
8. Select **Hired** to indicate the employee is available for scheduling. Hired is the default status for active employees. You cannot change the 'Effective date' for employees if the User Status is Hired.



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**.



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.

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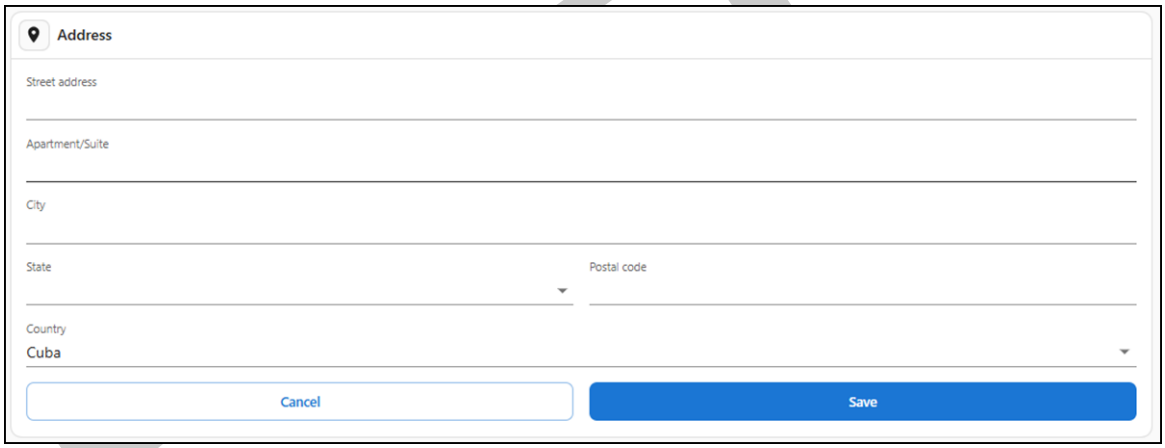
9. Click **Save** to save the changes to status.

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**.



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.

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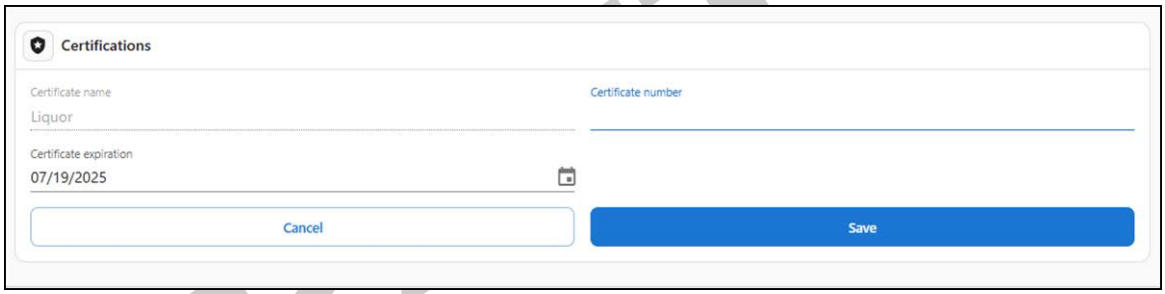
16. Click **Save**.

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.



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**.

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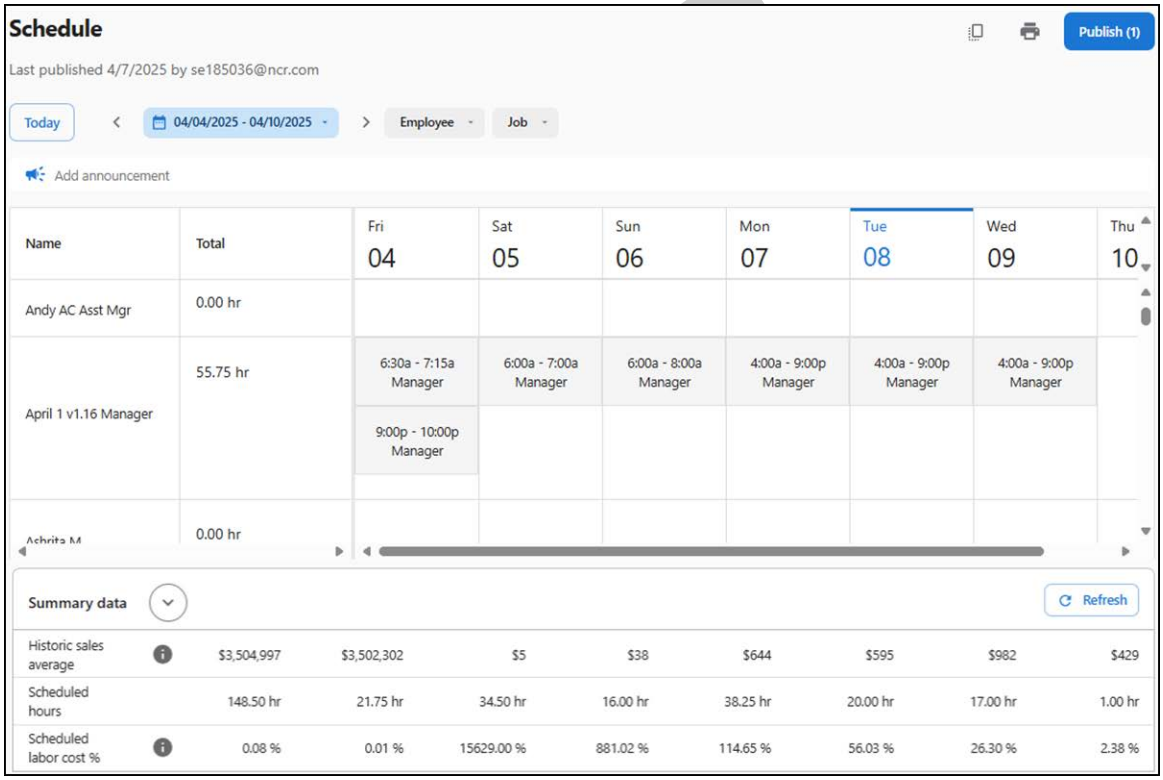
Working with schedules

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' screen

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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 *Review the employee for the following: Part-time critical* message appears. • **Week** for which the shift is planned.
Adding a shift	Hover-over the calendar to view the **Add Shift** option. Use this option to create new shifts. ***Related information:*** To understand how to create shifts, see Adding a shift.
Cell in the Schedule table	Indicates the shift and job currently assigned to the employee.
Summary data	View the summary information for the past six weeks under Historic sales average, Scheduled hours, and Scheduled labor cost %.
Publish	Publish the shift calendar to employees.

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Selecting a schedule week

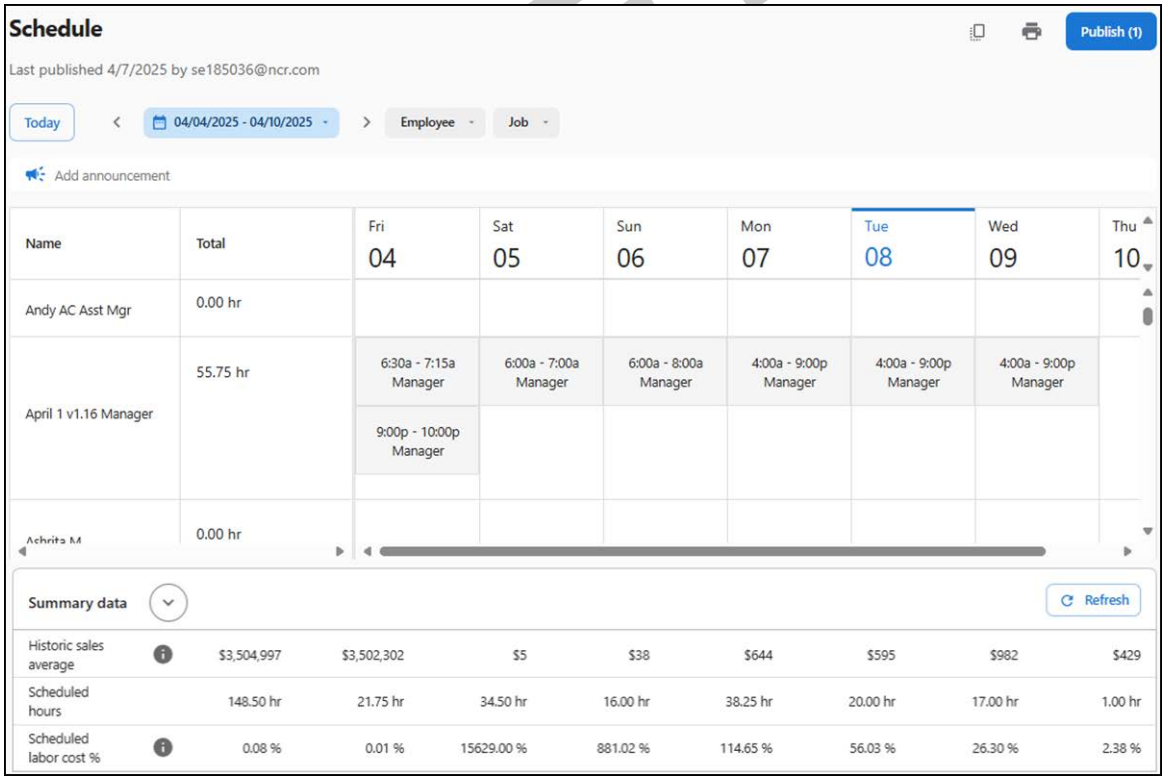
The schedule includes the employee schedule data, so the manager knows who is working on each shift, what time they enter and leave and where in the restaurant they will be working.

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' screen

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

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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.

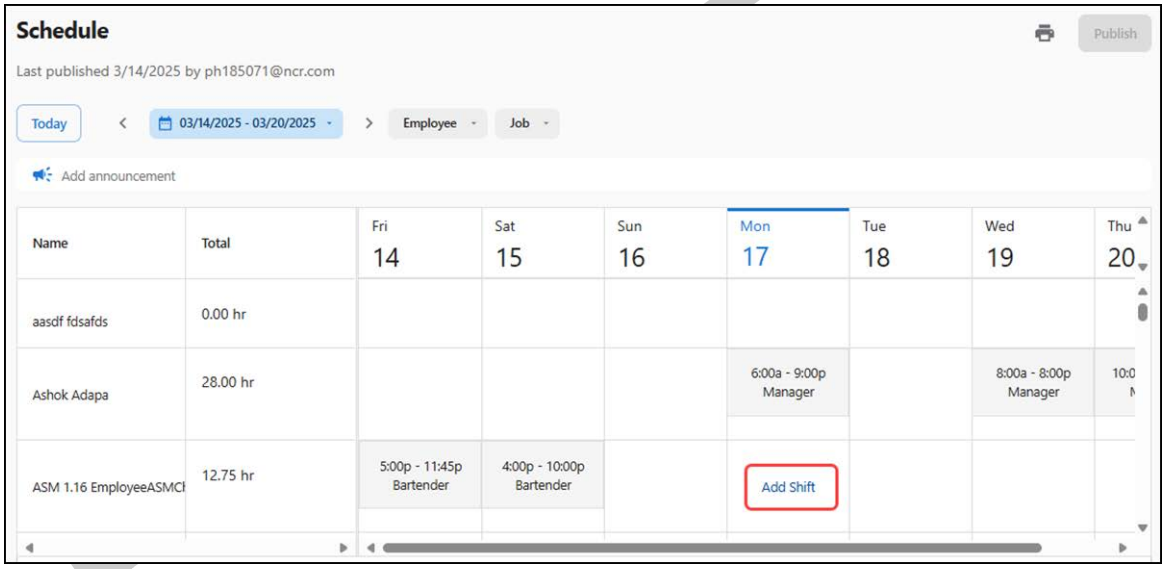
Select the **range** from the calendar picker.

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' adding shift

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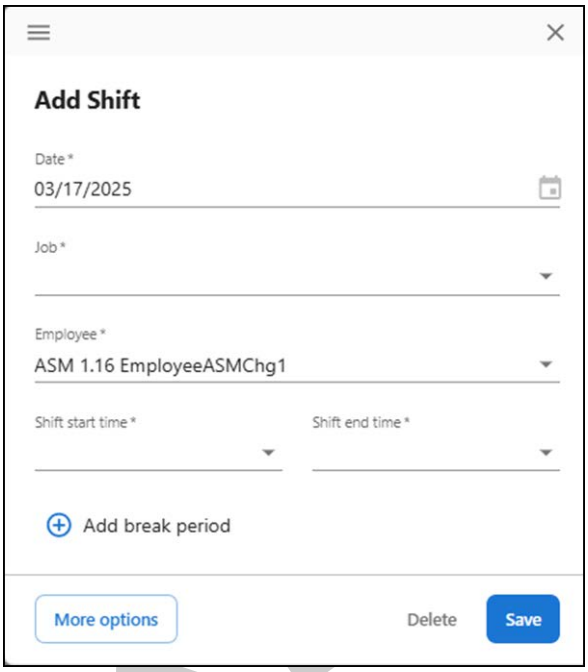
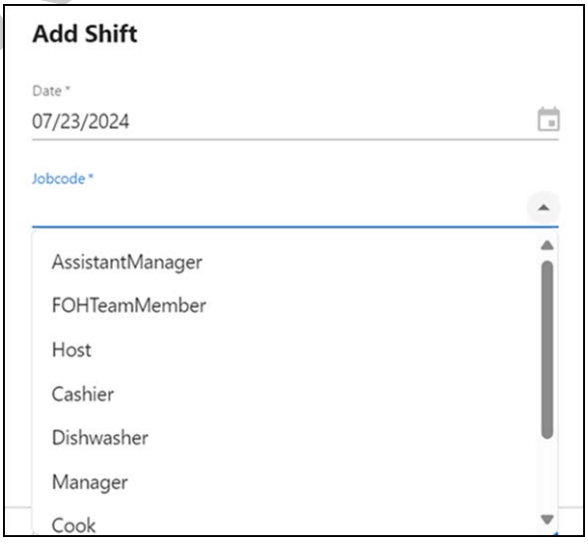
2. Locate the **employee in the list**, hover over the **date** to the right, and click **Add Shift**. The 'Add Shift' screen appears as a pop-out with the selected date.



'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).

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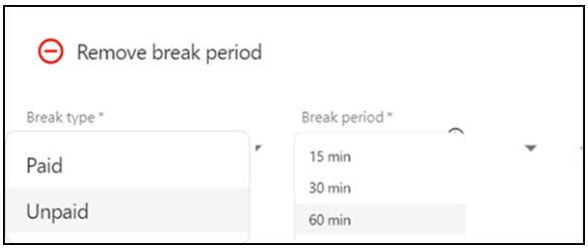
5. Click **Add break period**. This is necessary for regions that require employees to take breaks.



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.

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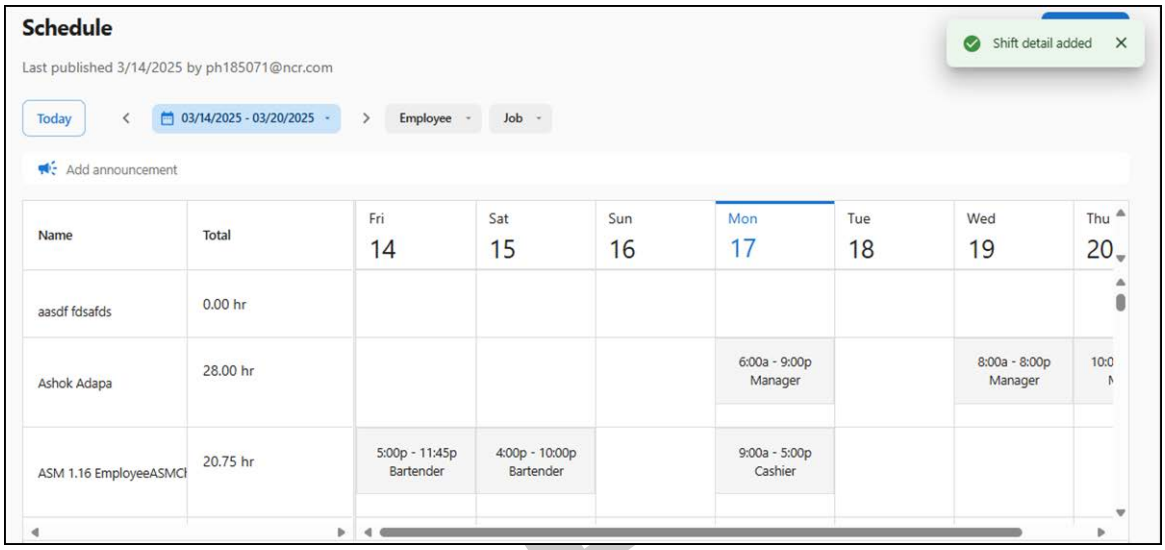
10. Click **More options** to enter any notes to communicate to the employee, such as 'You're working the VIP room for this shift so look sharp.'
11. Click **Save**. The shift is added to the schedule week.



Success message

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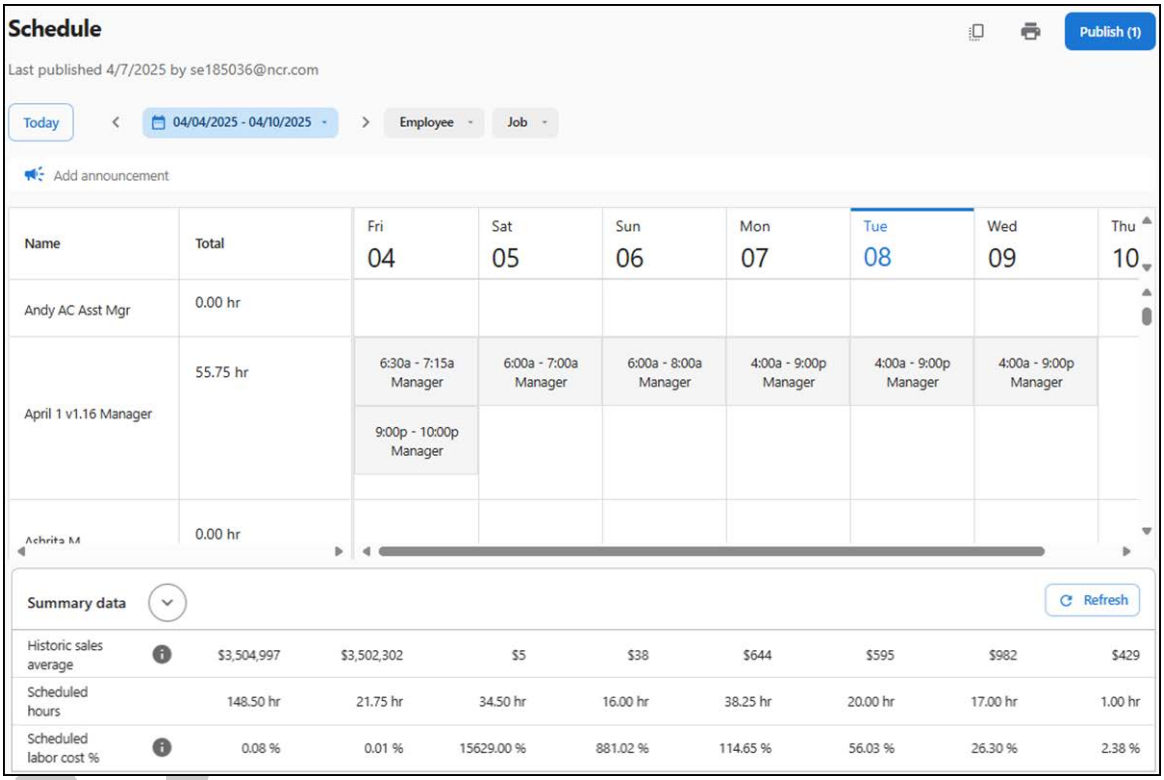
Filtering shifts by job or employee

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

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



'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.

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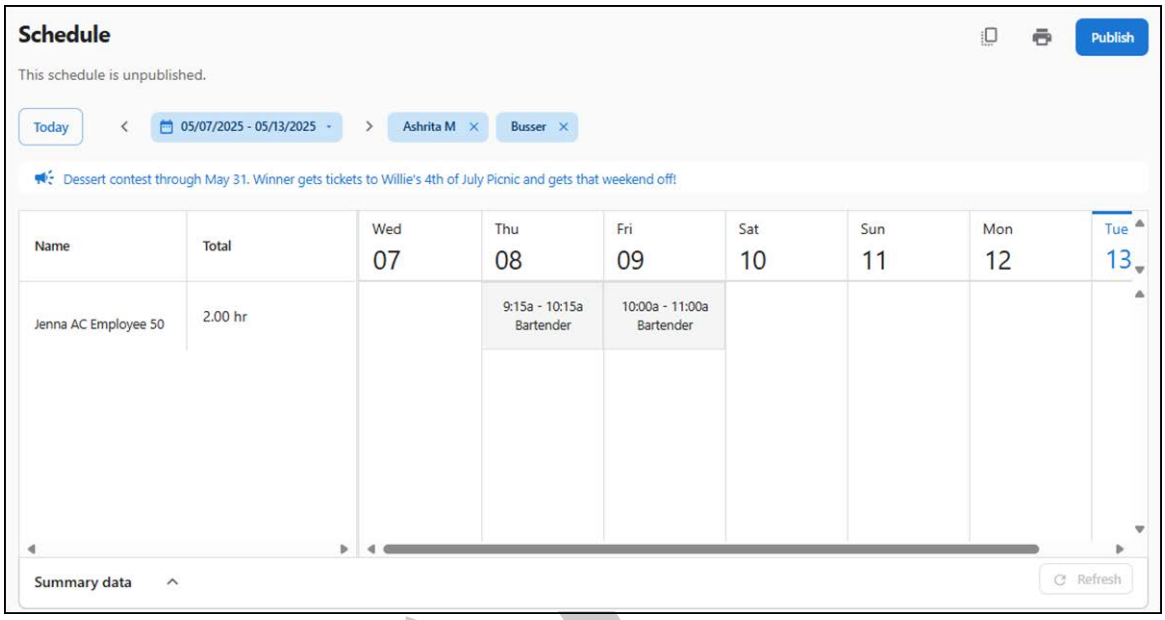
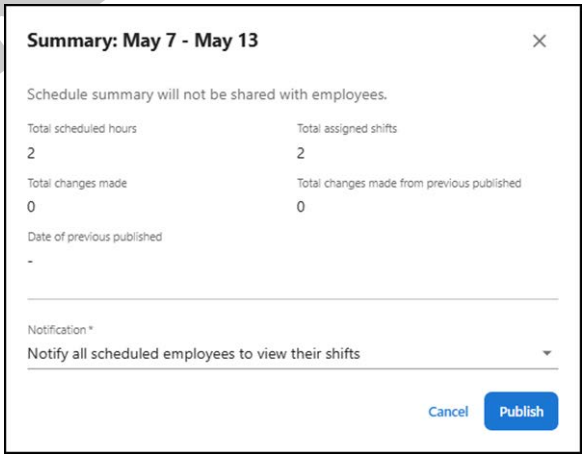
To publish a schedule:

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

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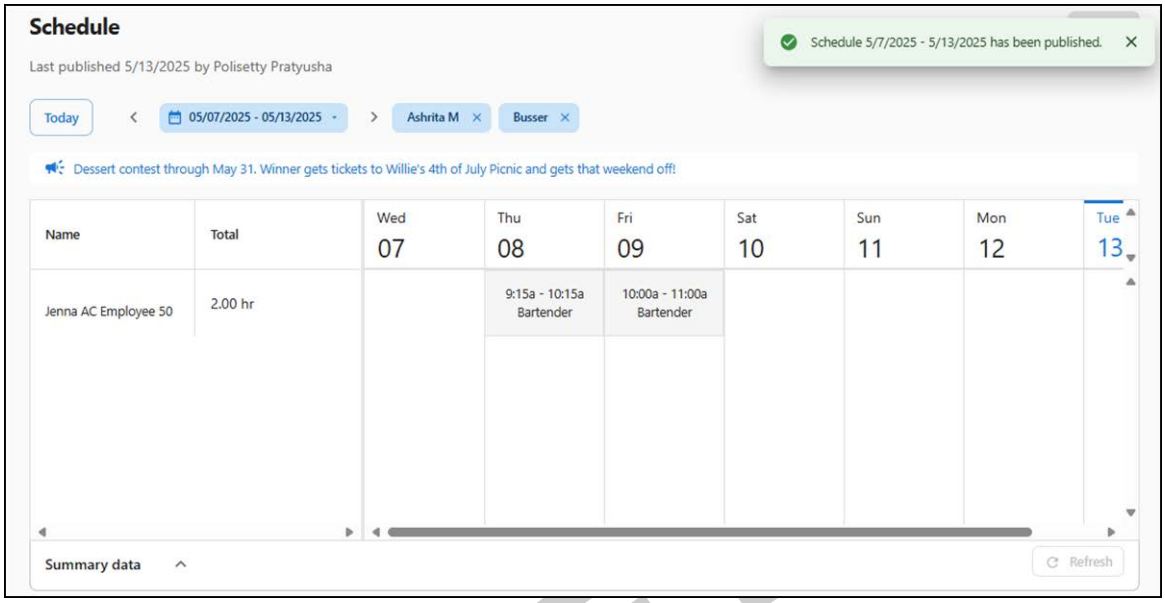
3. Click **Publish**.



Schedule confirmation detail

A confirmation detail appears on the page publishing the schedule.

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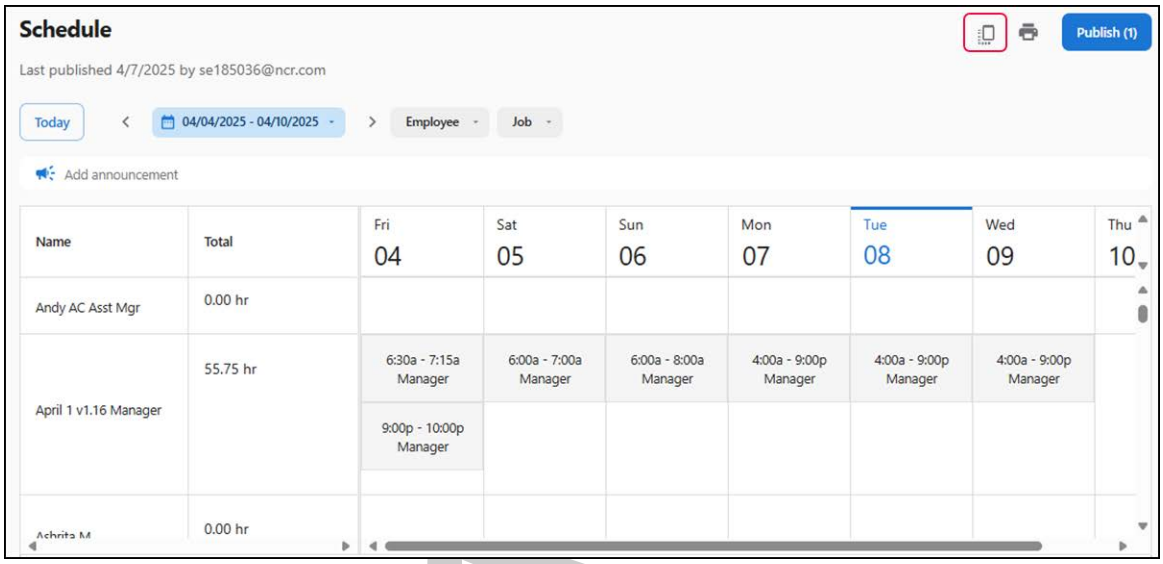
Copying a schedule

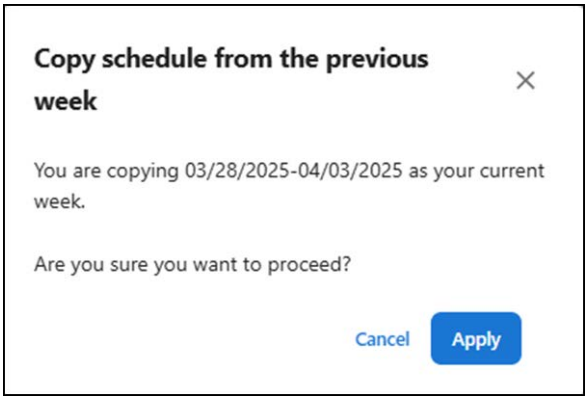
The 'copy schedule' feature for a manager is efficient, saving time by duplicating existing schedules. It is convenient, simplifying the process of creating new schedules with ease. Additionally, it ensures consistency across different shifts, making it user-friendly and flexible for quick adjustments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

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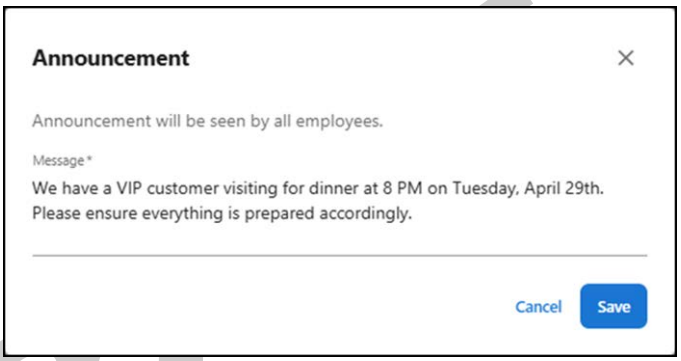
3. Click **Apply**. The system copies the schedule for the current-selected week and also all future schedule weeks as required.

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.

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Viewing employees on a shift

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

To view employees on a shift:

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

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

'Shift tracker' screen

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

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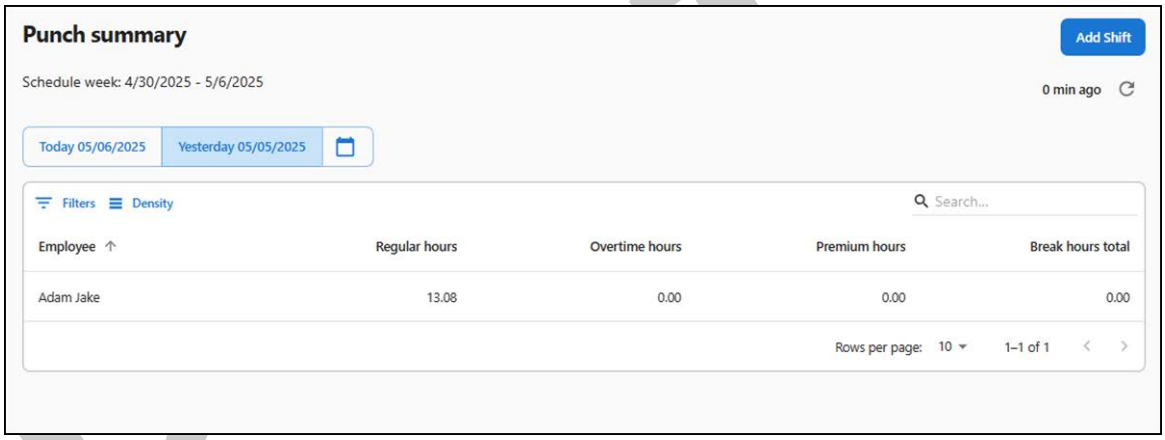
Working with punches

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' screen

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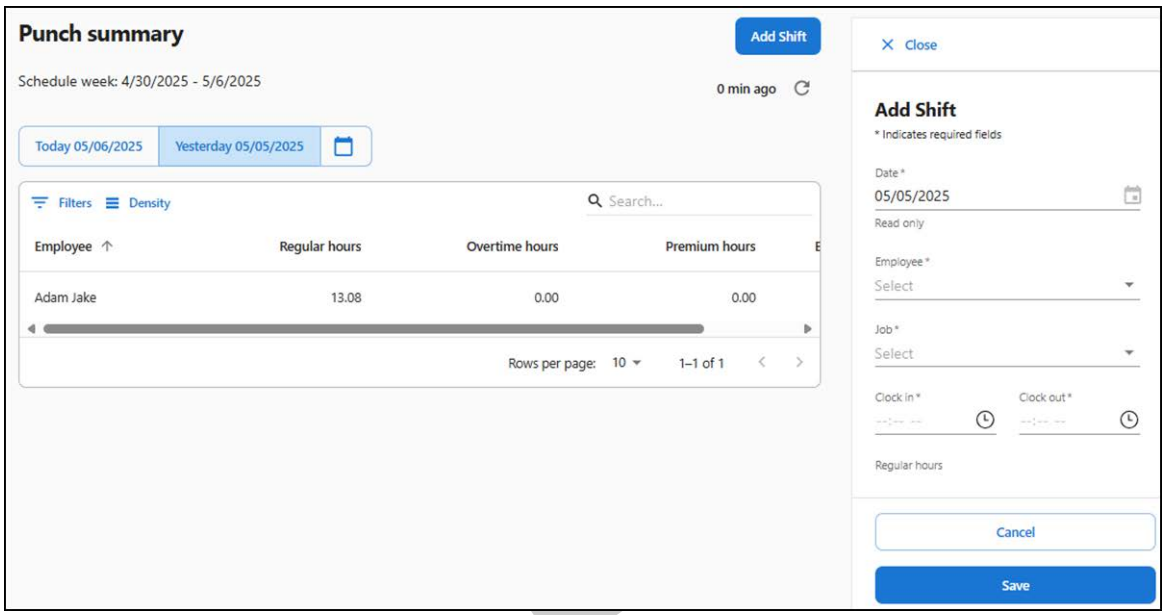
2. Click **Add Shift**. The 'Add Shift' screen appears on the right side of the screen.



'Add shift' screen

3. Select the **Date** of the punch.
4. Select the **Employee** associated with the punch.
5. Select the **Job** the employee worked.

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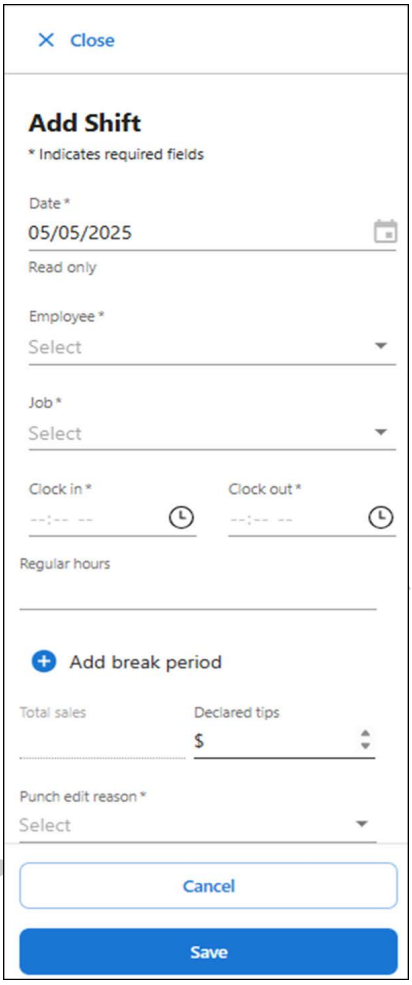
6. Enter the **Clock in and Clock out time** of the shift.



'Add shift' screen

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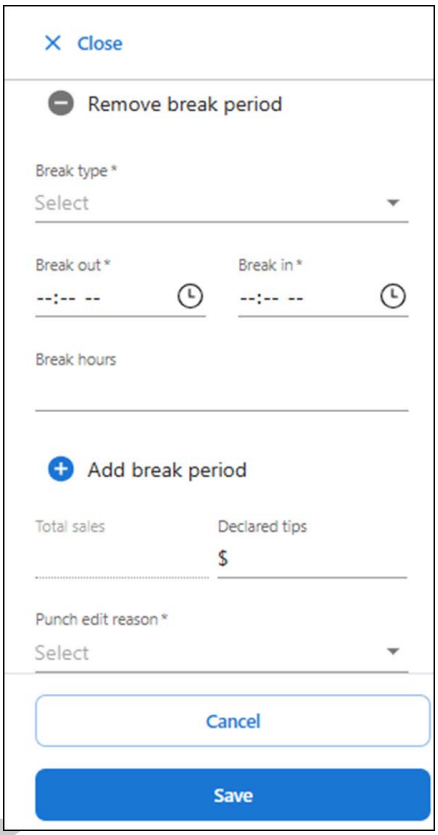
7. Click **Add break period** if you are editing the shift details for a break punch. The following options appear:



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.

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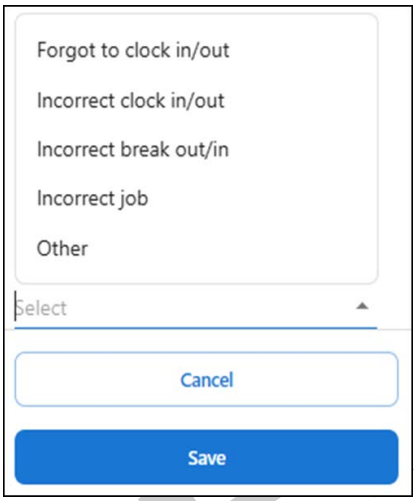
8. View the employee **total sales**, if any. This is a read only field.
9. Enter **declared tips** of an employee, if necessary. You can view the log specific to the declared tips. For more information, refer to Viewing the Activity Log on page 182.



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.

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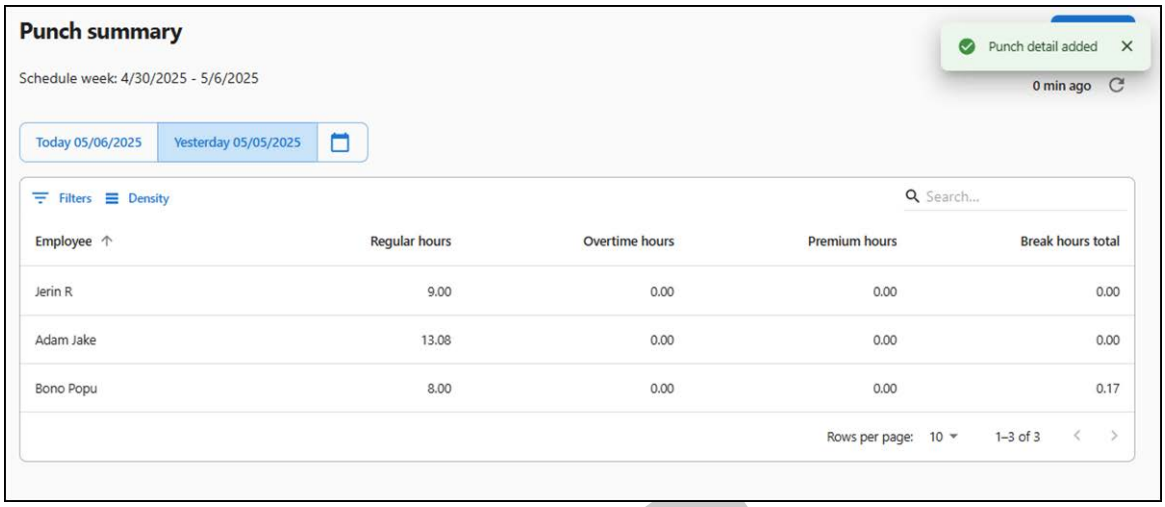
11. Click **Save**.



'Punch summary' screen - Success message

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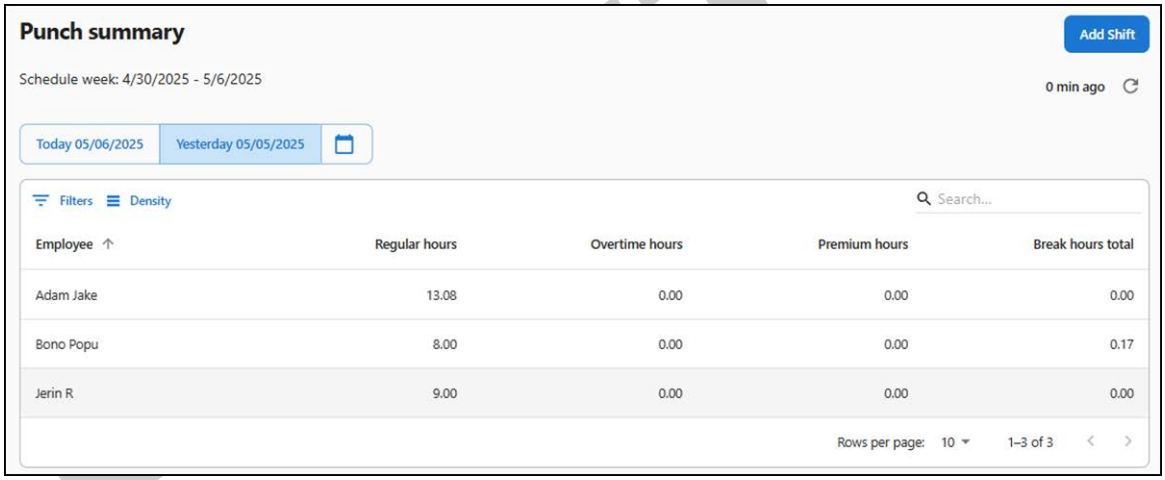
The **Punch detail** adds to the screen and appears with the following details.

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' screen

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

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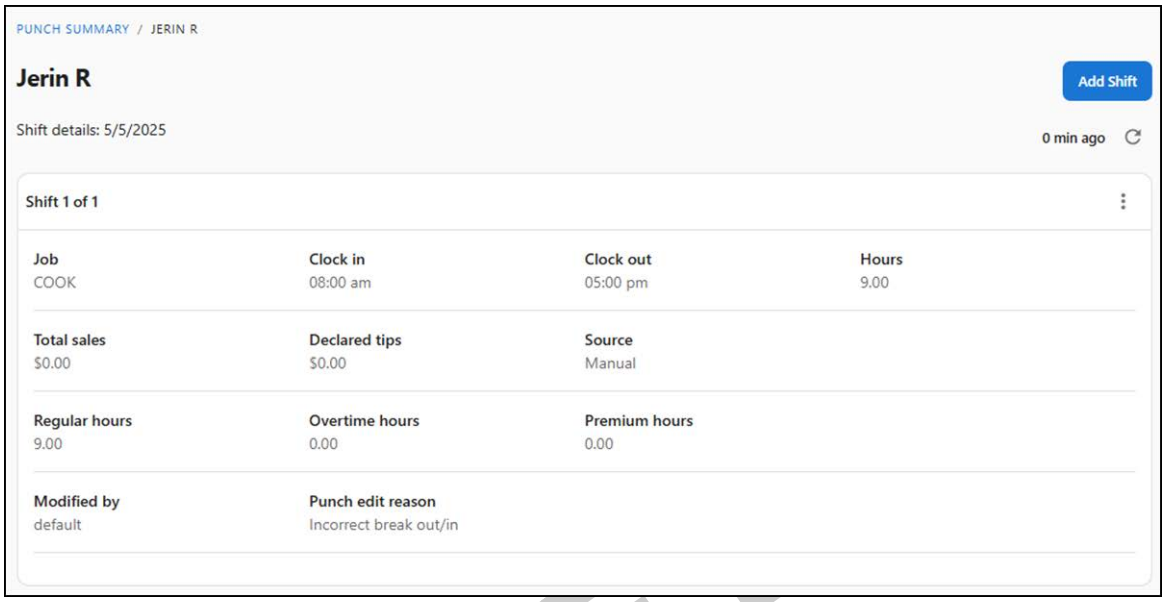
3. Click the **employee** to view the shift detail. The shift details of the employee appear.



'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.

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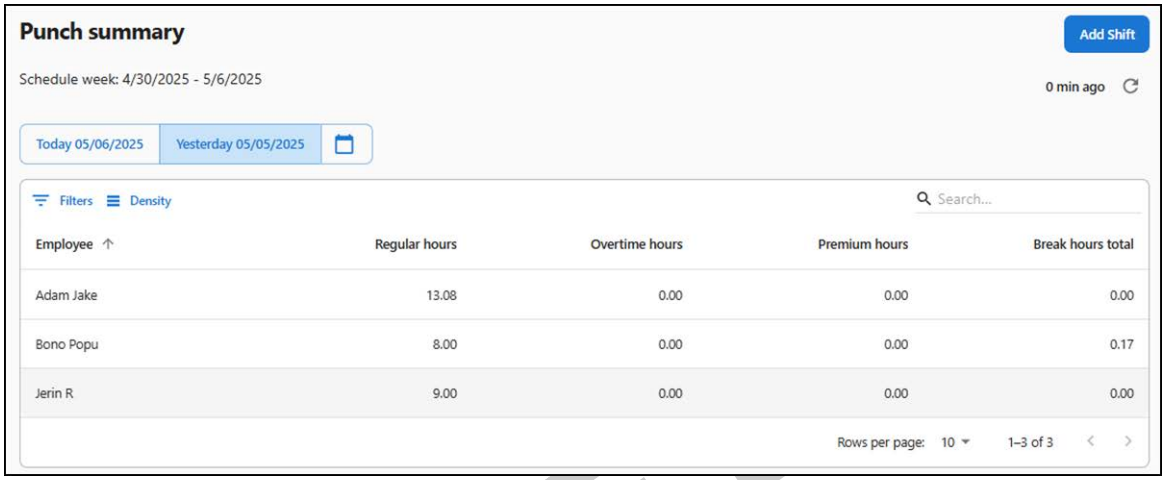
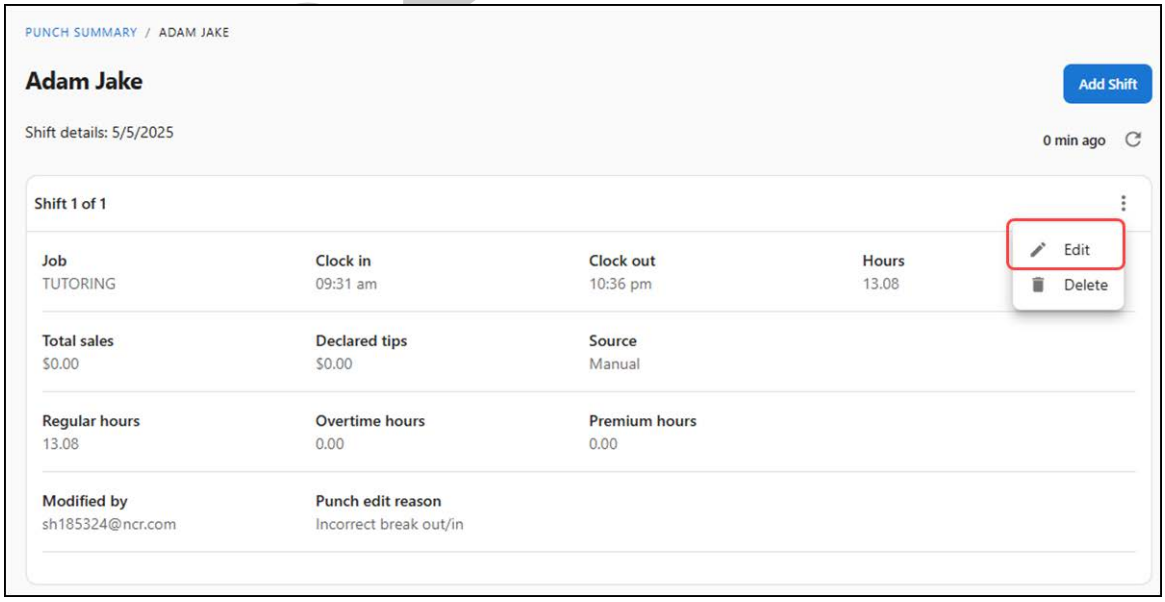
To edit shift details:

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' screen

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



Edit shift details

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

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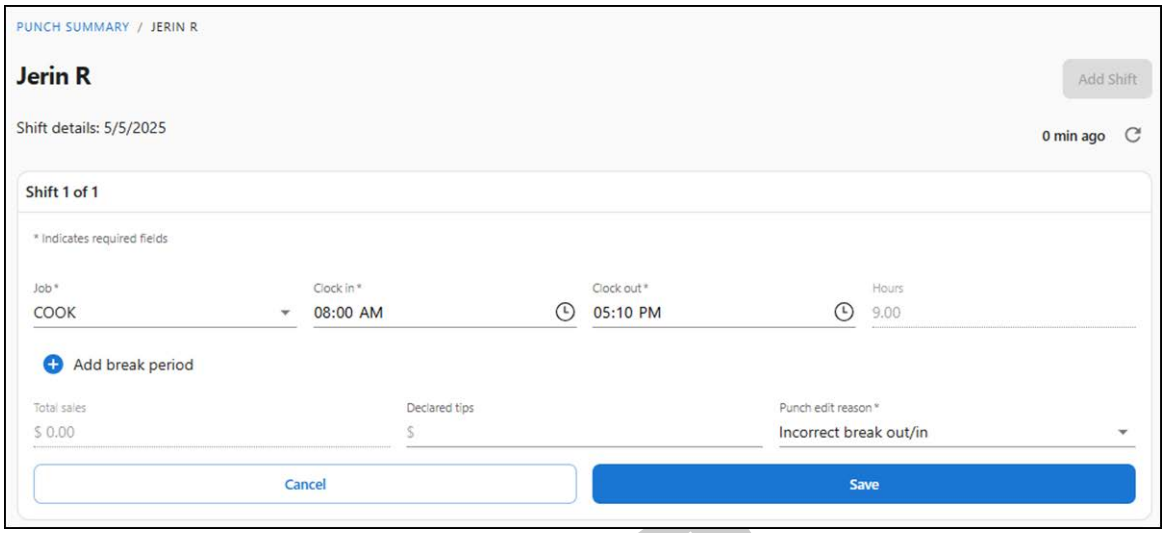
5. Click **Edit** to make the necessary changes.



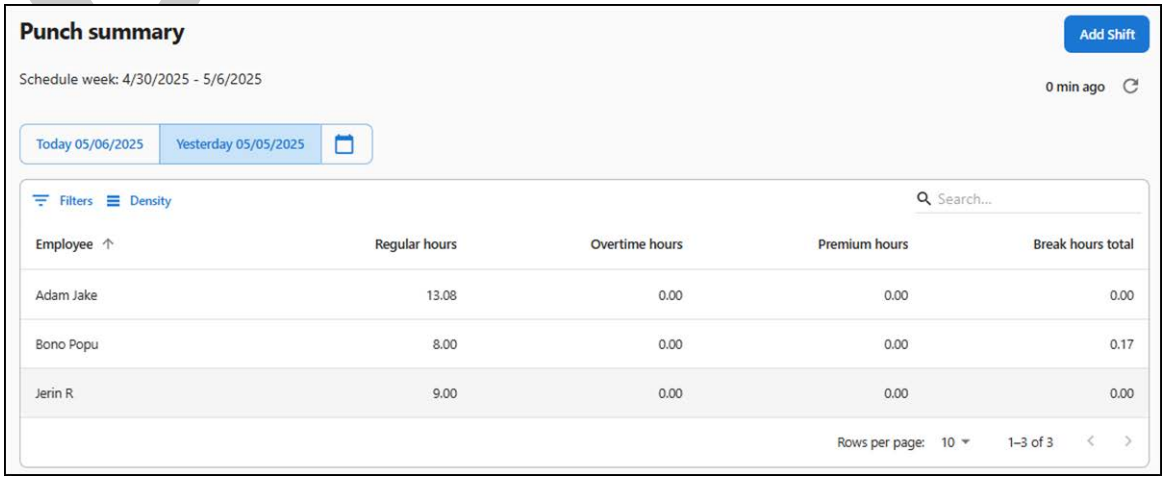
Edit shift details

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' screen

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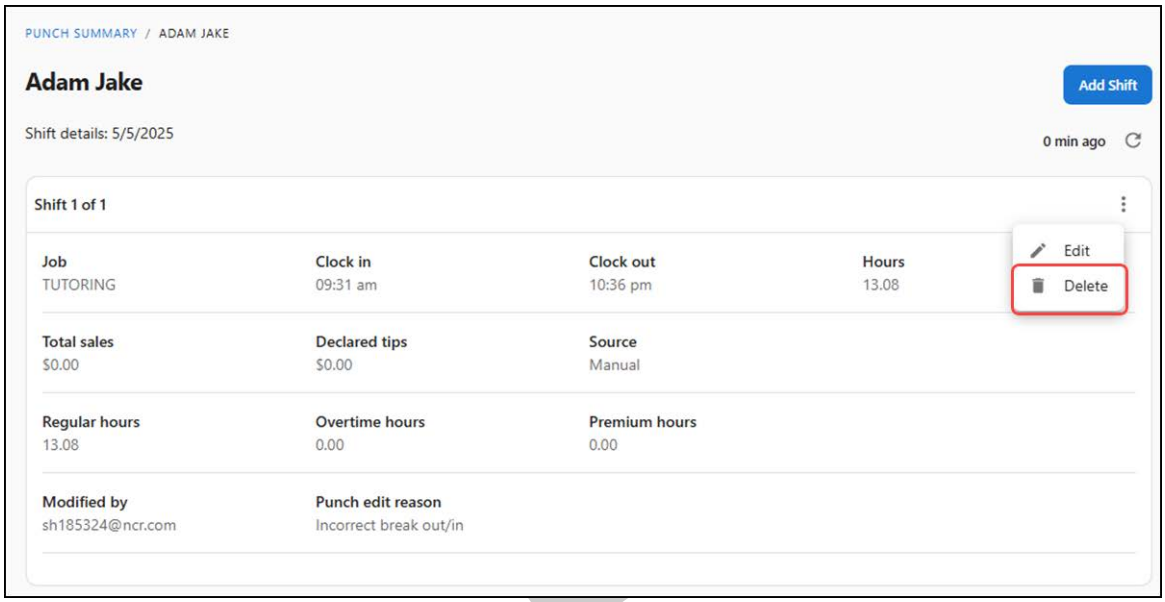
3. Select the **employee** for which to delete the shift details. The shift details screen of the employee appears.



Delete shift details

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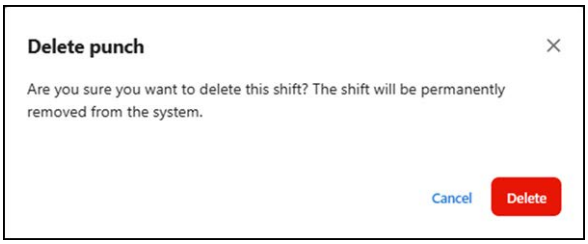
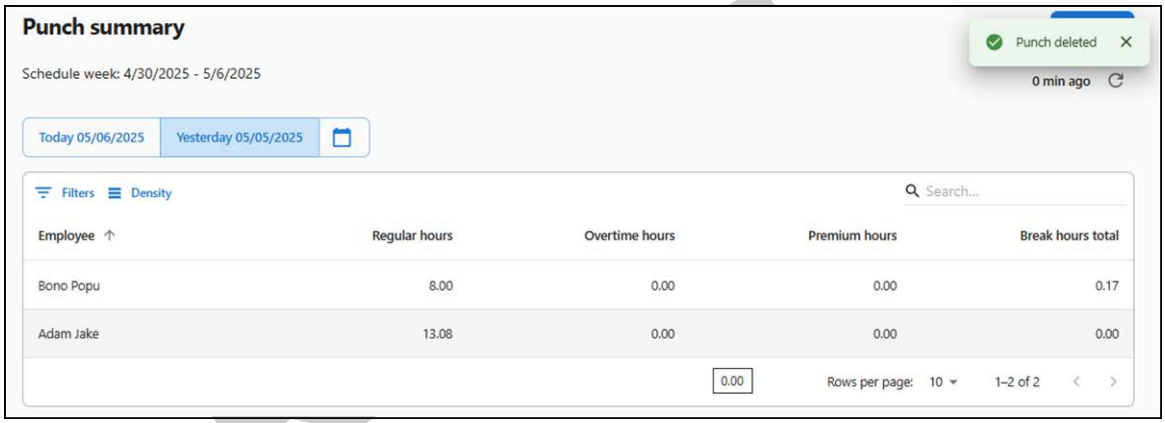
4. Click the **three dot** icon next to the shift to delete and click **Delete**. A confirmation message to remove the shift from the employee appears.



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.

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Working with labor 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.

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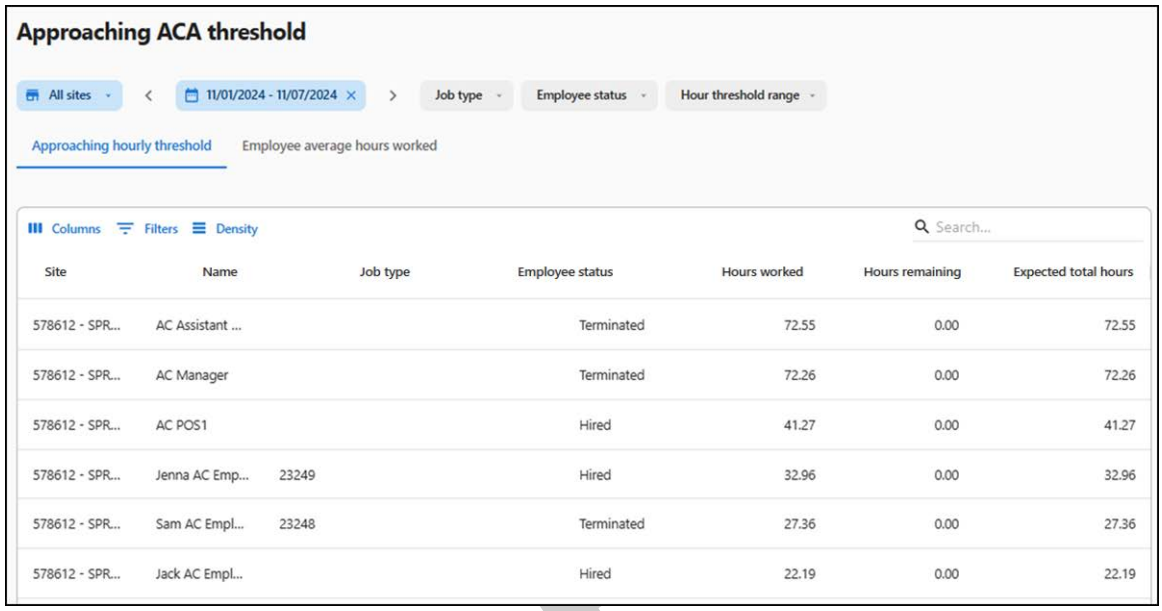
Viewing the 'Approaching ACA threshold' report — Approaching hourly threshold view

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



'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 list (only scheduled weeks).
4. Select the **job type** from the drop-down list. Choose from Full time and Part time.
5. Select the **employment status** from the drop-down list.
6. Select the **hourly threshold value** from these predefined ranges: All, 20-25, 25-30, and more than 30.

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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 'Approaching ACA threshold' report — Employee average hours worked view

The 'Employee average hours worked' report displays the average hours worked over the past six months.

'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.

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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.

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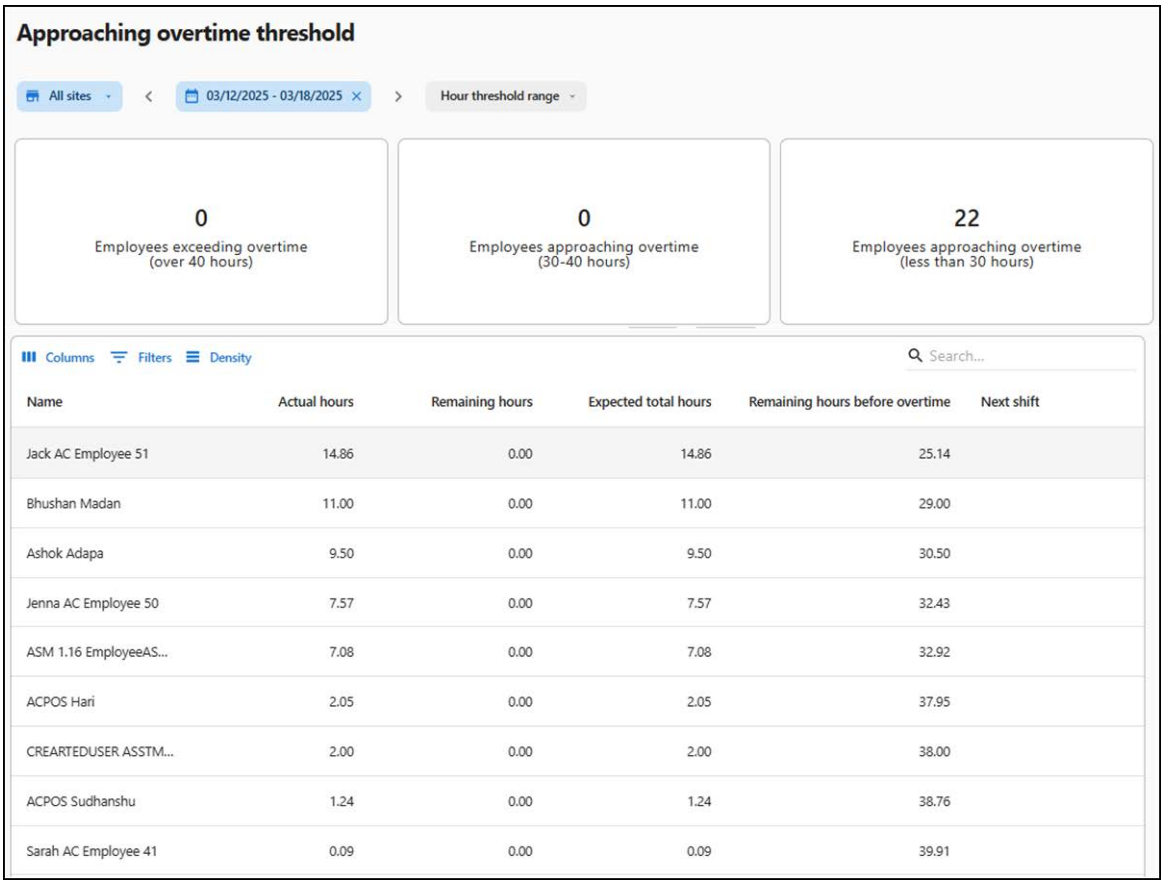
Approaching overtime threshold

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



'Approaching overtime threshold' 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.

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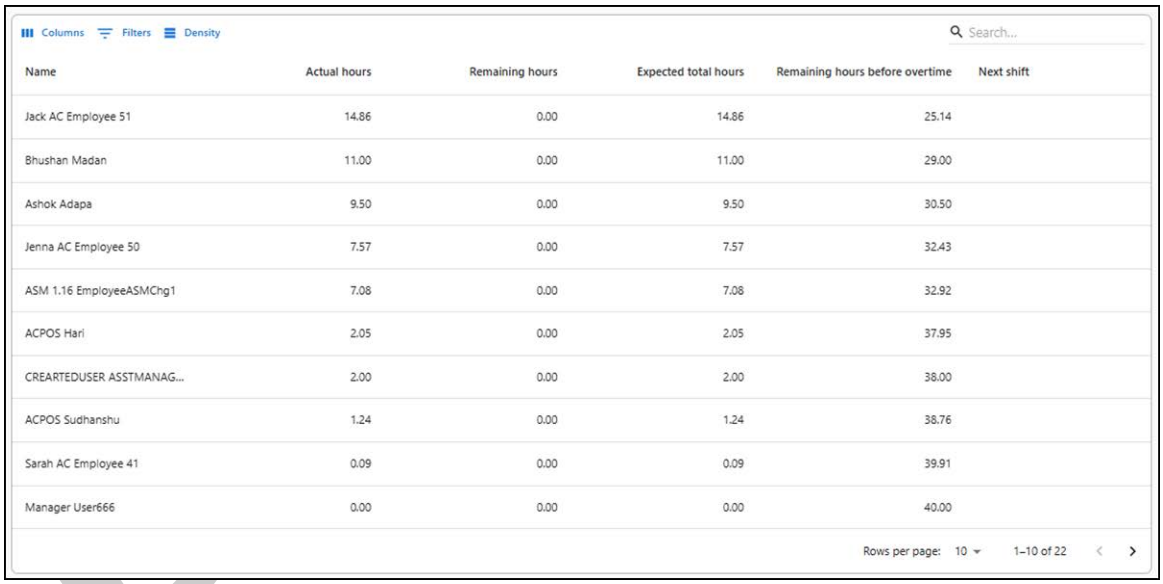
The data appears in three tiles:

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.



'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.

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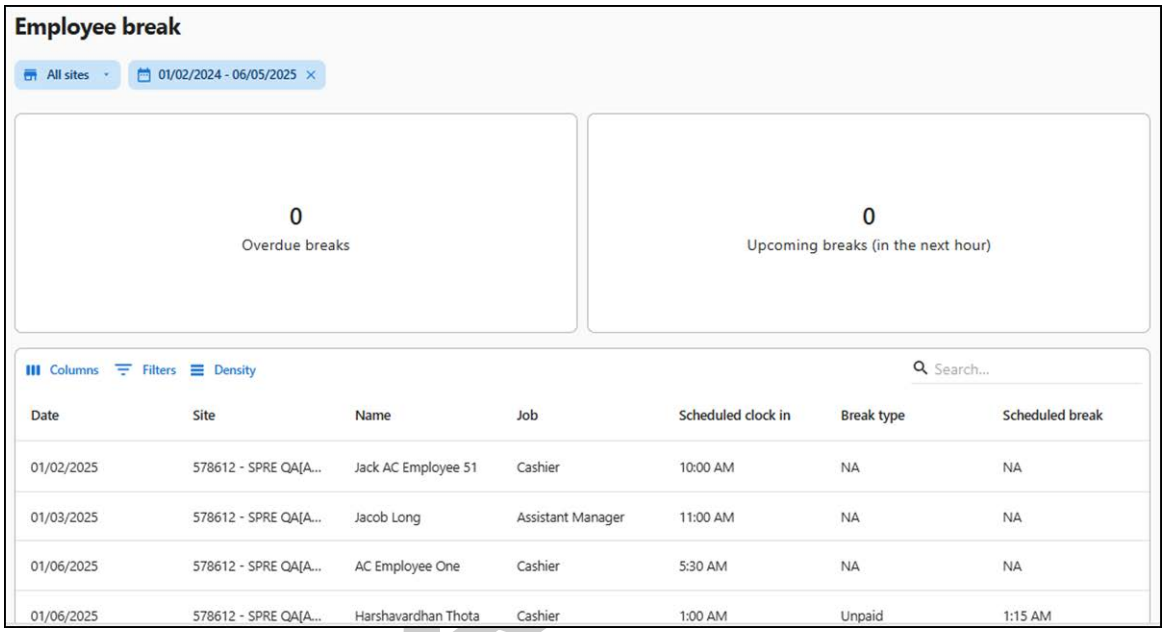
Employee break

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' - 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.

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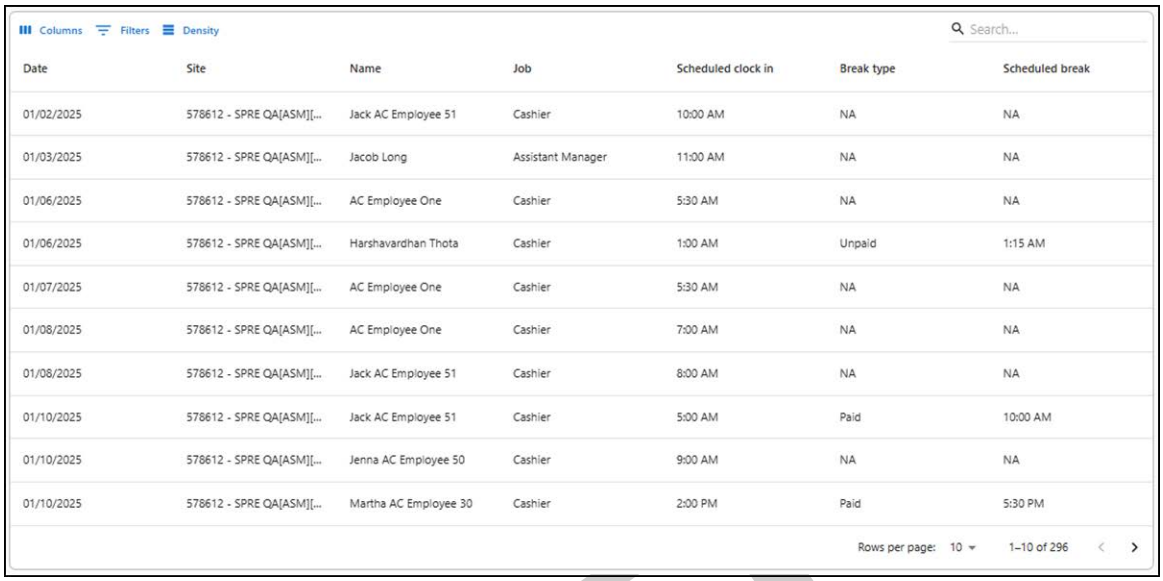
Upcoming breaks (in the next hour) — Total number of breaks due for the next hour.



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.

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Employee payroll

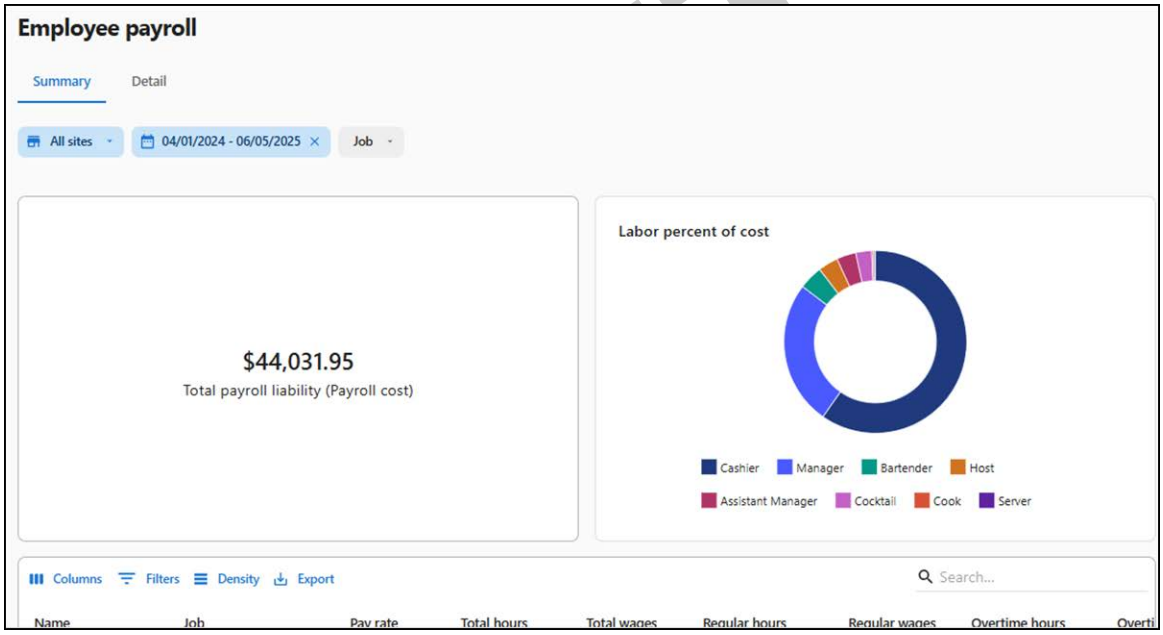
Use the 'Employee payroll' report to view employee payroll information for a selected pay period. The summary section of the report displays the hours and dollars by job, and any overtime or penalty pay earned by the employee. The detail section of the report displays information for individual punches.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

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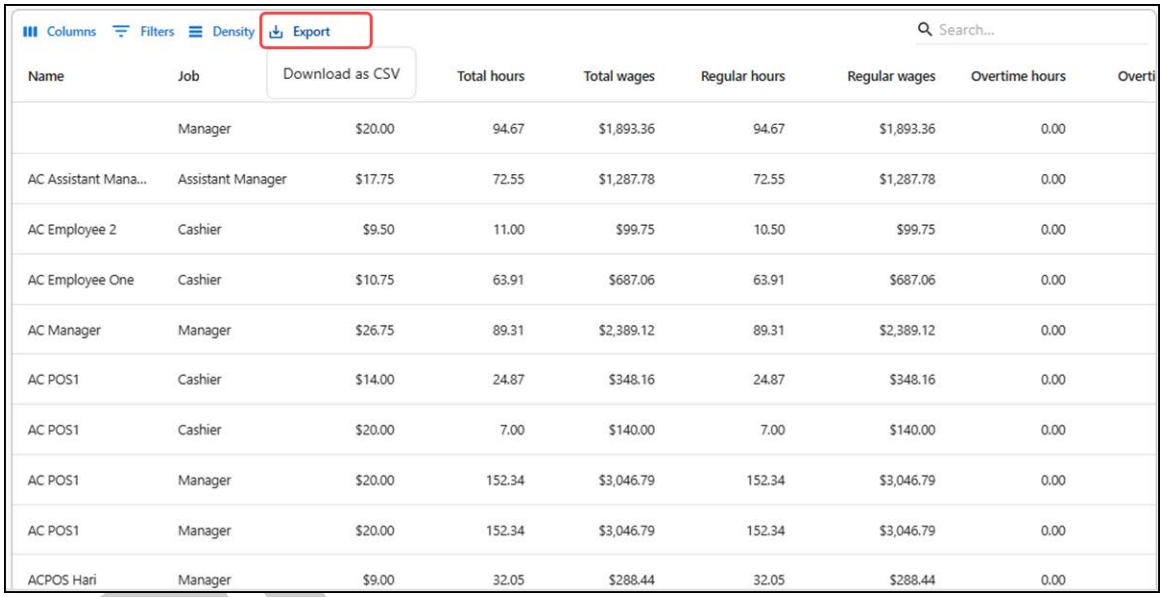
The following details appear in the tiles:

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.



Name	Job		Total hours	Total wages	Regular hours	Regular wages	Overtime hours	Overti
	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

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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.

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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.

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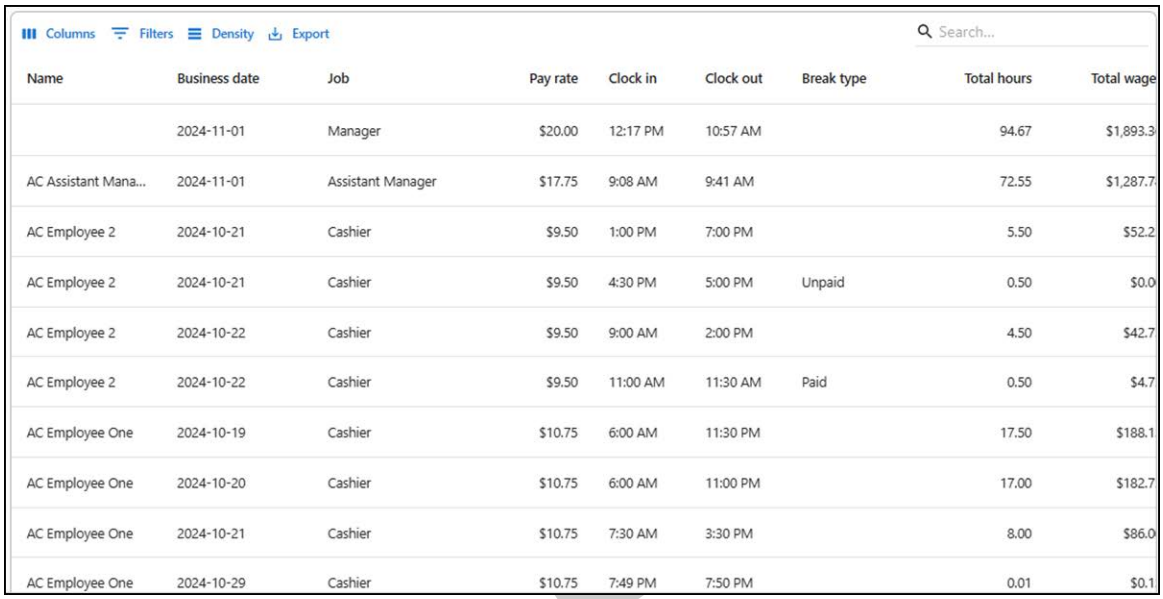
Labor percent of cost — Breakup of cost incurred by job. Hover-over the graph to view the labor cost (in percentage) and salary (in currency).



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.

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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.

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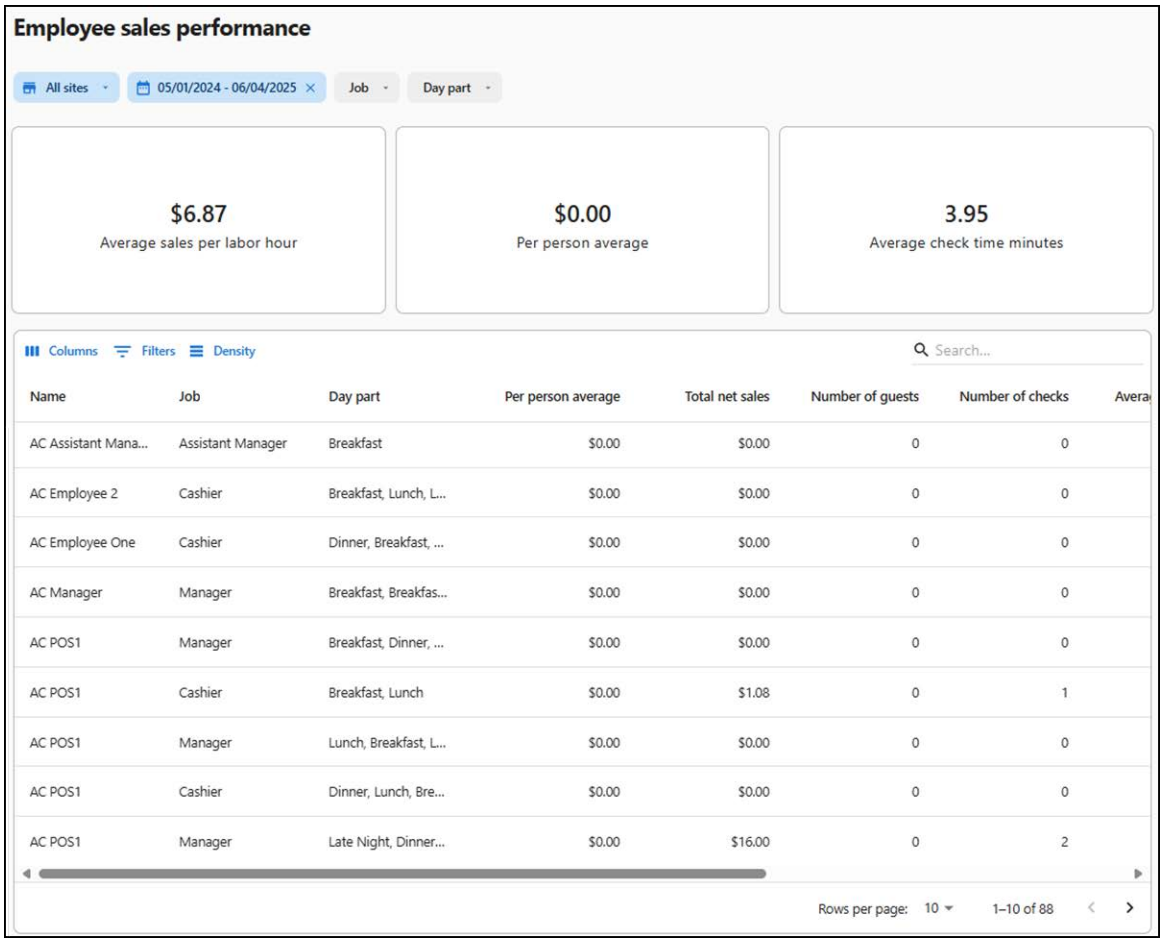
Employee sales performance

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' 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.

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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.

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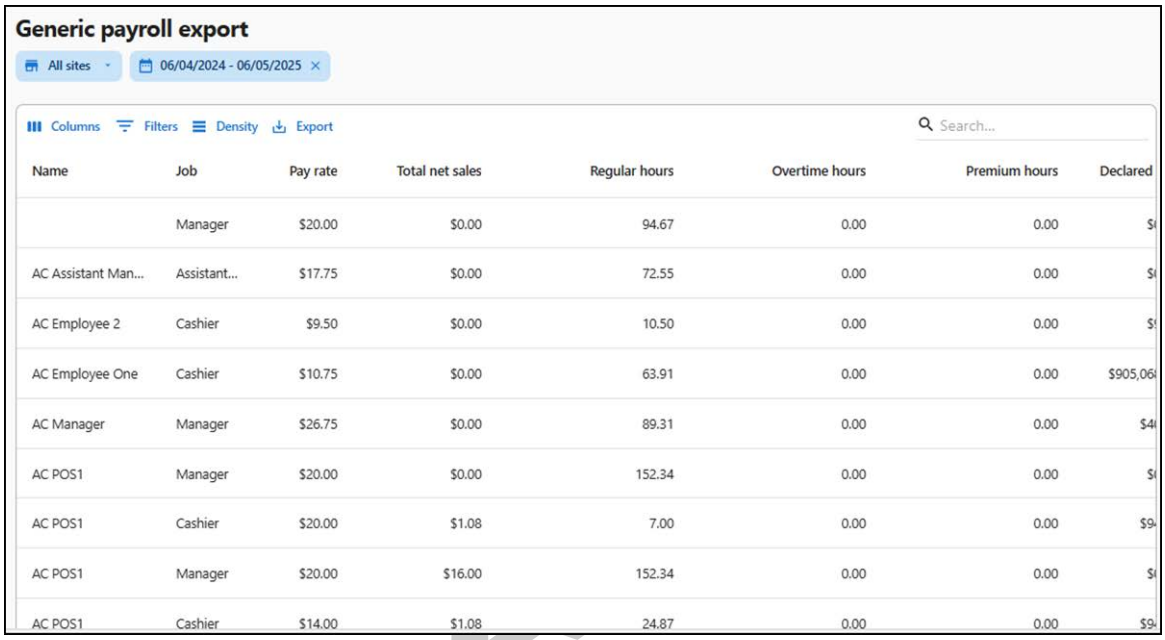
Generic payroll export

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.



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	$(
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	Manager	$20.00	$0.00	152.34	0.00	0.00	$(
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	$(
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.

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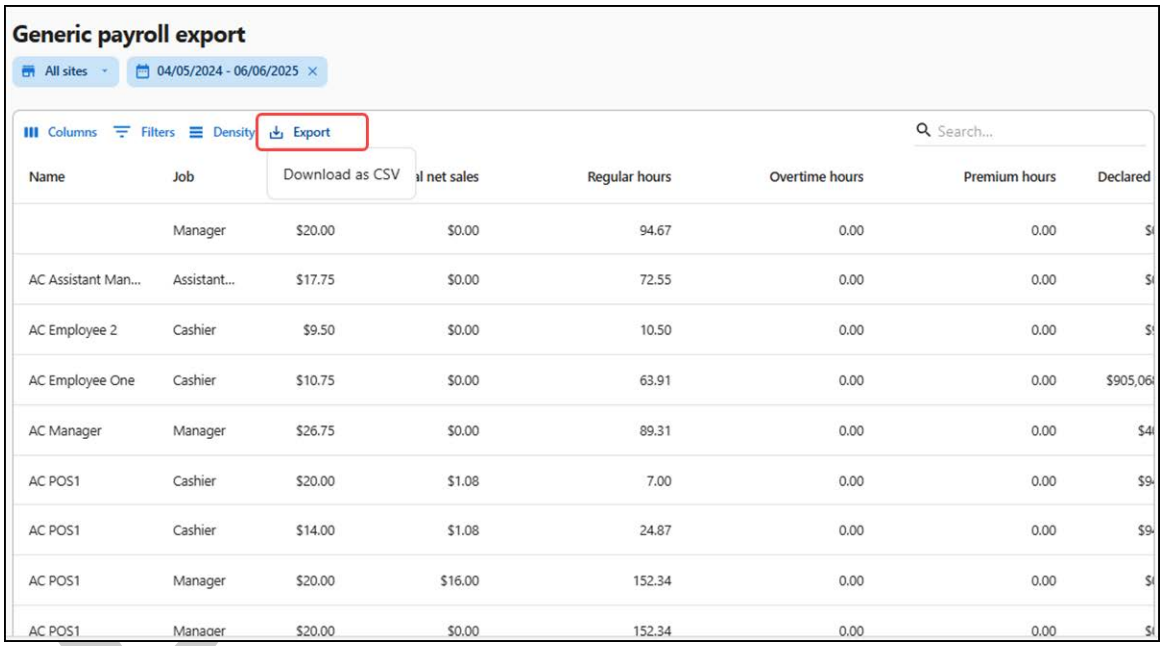
Column	Description
Total net sales	The sum of net sales.
Regular hours	The hours the employee is planned to work for the shift.
Overtime hours	The overtime hours the employee worked.
Premium hours	The number of premium hours worked.
Declared tips	The total amount of tips declared
Tip percent	The percentage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



'Generic payroll 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.

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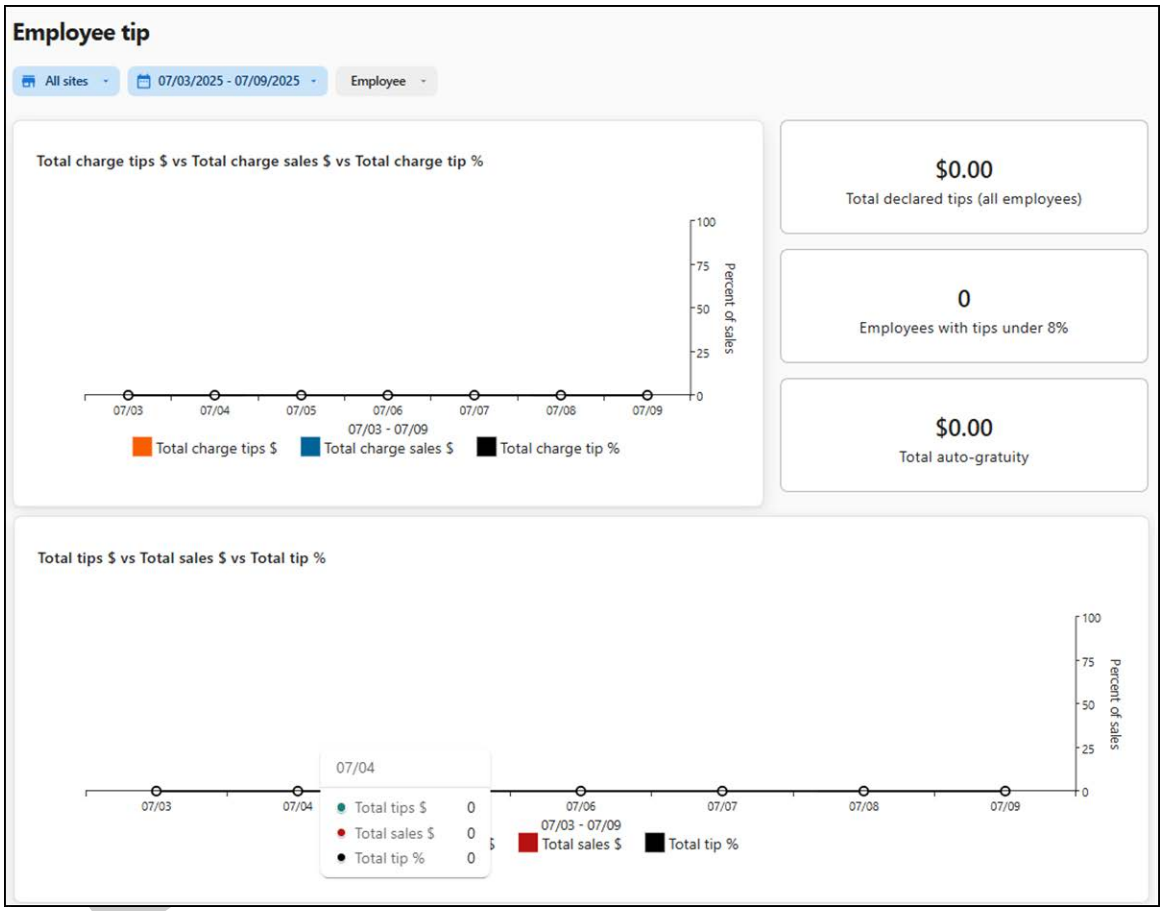
Employee tip

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.

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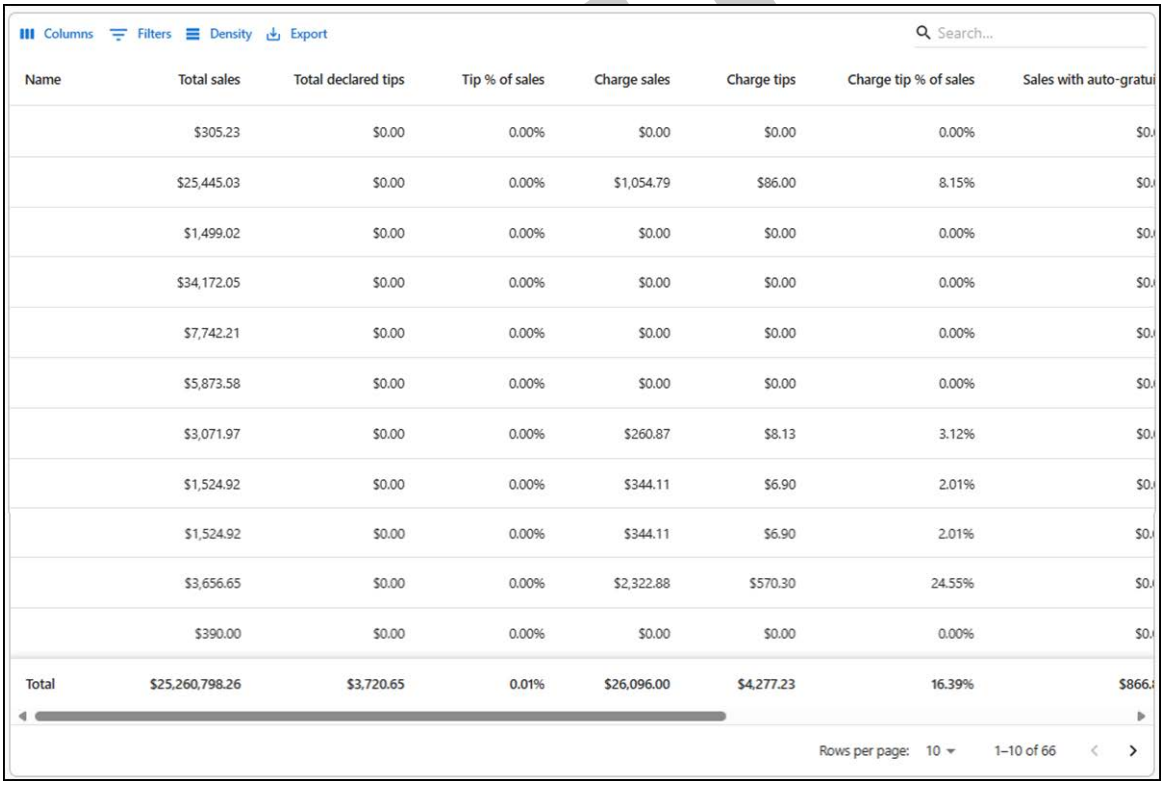
Total charge tips $vs Total charge sales $vs Total charge tip% — Displays data as a line graph on the axes showing the percent of sales along with days/months/years, based on the date range selection. Hover over the line graph to show the total amount of tips, total amount of sales and the percentage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



Name	Total sales	Total declared tips	Tip % of sales	Charge sales	Charge tips	Charge tip % of sales	Sales with auto-gratui
	$305.23	$0.00	0.00%	$0.00	$0.00	0.00%	$0.
	$25,445.03	$0.00	0.00%	$1,054.79	$86.00	8.15%	$0.
	$1,499.02	$0.00	0.00%	$0.00	$0.00	0.00%	$0.
	$34,172.05	$0.00	0.00%	$0.00	$0.00	0.00%	$0.
	$7,742.21	$0.00	0.00%	$0.00	$0.00	0.00%	$0.
	$5,873.58	$0.00	0.00%	$0.00	$0.00	0.00%	$0.
	$3,071.97	$0.00	0.00%	$260.87	$8.13	3.12%	$0.
	$1,524.92	$0.00	0.00%	$344.11	$6.90	2.01%	$0.
	$1,524.92	$0.00	0.00%	$344.11	$6.90	2.01%	$0.
	$3,656.65	$0.00	0.00%	$2,322.88	$570.30	24.55%	$0.
	$390.00	$0.00	0.00%	$0.00	$0.00	0.00%	$0.
Total	$25,260,798.26	$3,720.65	0.01%	$26,096.00	$4,277.23	16.39%	$866.

'Employee tip report' details

The data in the table appears with the following information:

Column	Description
Name	The name of the employee.

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Column	Description
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.

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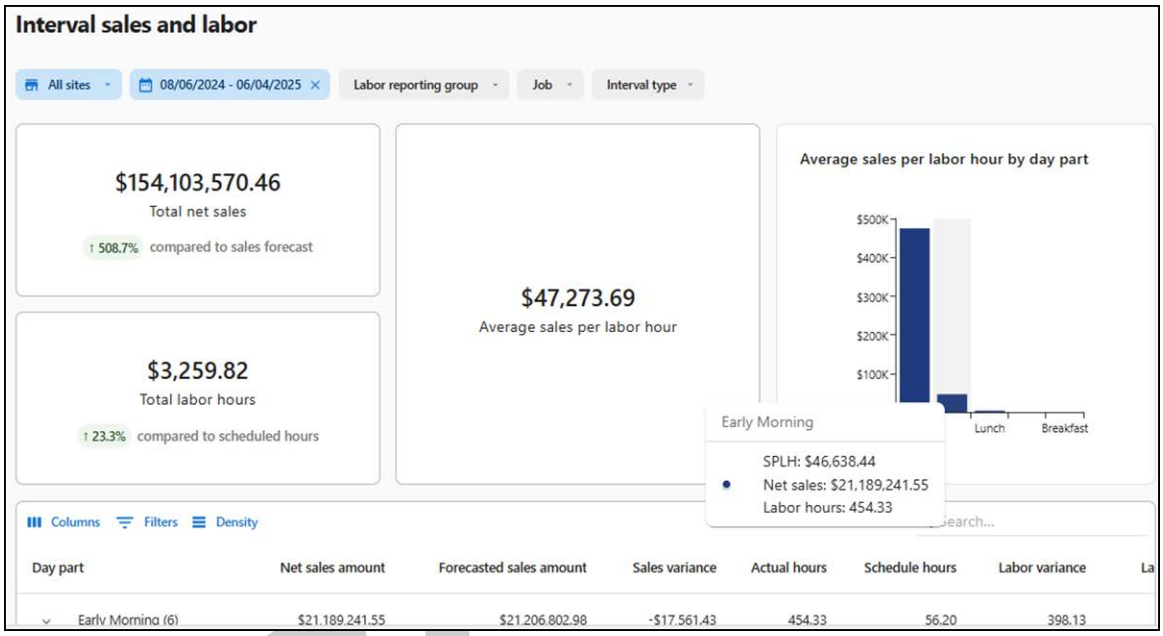
Interval sales and labor

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.

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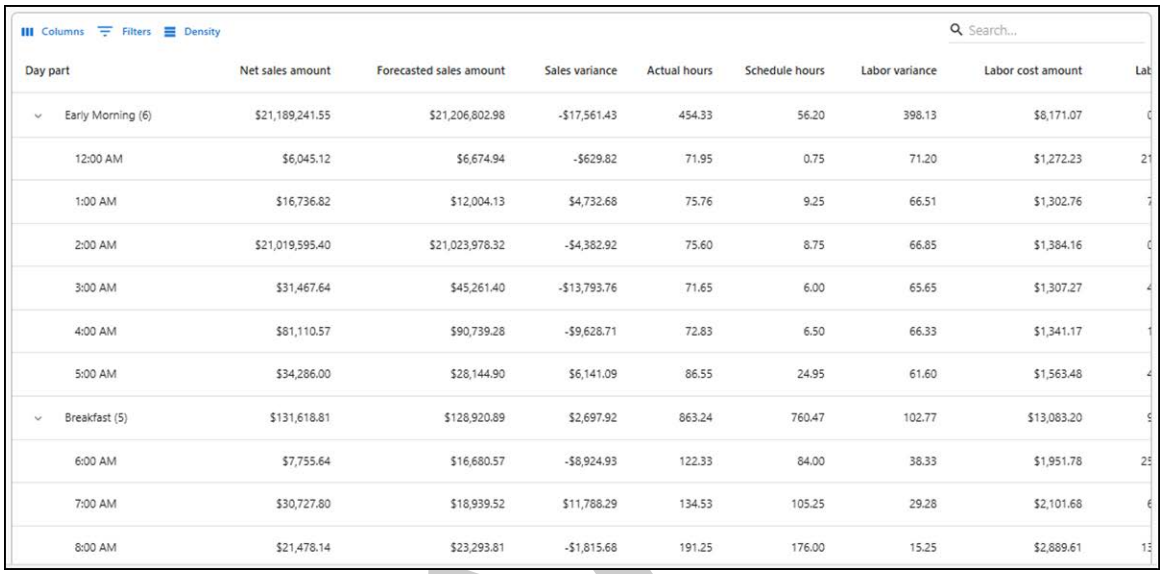
Average sales per labor hour by day part — Average of sales for each labor hour by each day part. Hover over the values to view the SPLH amount, net sales amount, and labor hours spent. ASM collects data for the actual worked hours and wages by type, to calculate the hours and wages and provide the LRE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



'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.

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About inventory management

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.

Some key areas of the Inventory module are:

- Managing units of measure
- Working with raw items
- Working with vendors
- Working with invoices
- Viewing 'Invoice history' report
- Managing recipes
- Viewing and mapping sales items
- Viewing modifier groups

See Also:

- Appendix A: Bulk importing vendors and vendor items on page 213
- Appendix B: Uploading an invoice on page 224

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Managing units of measure (Inventory Core only)

A unit of measure (UOM) is the unit in which you count and track stock items, such as by case, package, six-pack, single can, two-liter bottle, and more. These units of measure determine how you measure your inventory items for ordering, invoicing, prepping, and food cost analysis. A successful inventory strategy relies on using a consistent set of units of measurement across the restaurant for raw item conversion.

ASM comes equipped with the industry-standard Imperial and Metric units of measure names in the volume, weight, and count classes for receiving units. The receiving units are typically made up of container, pack, size, and a size standard name. All receiving units must contain a standard unit of measure reference (size).

ASM contains some predefined units of measure. If the predefined (default) units of measure do not suit your needs, you can create a custom unit of measure and use the unit in all places in the system.

Units of measure are used in the definition and maintenance of raw items, vendor items, menu items, batch items, and modifier items. Units of measure are also used in:

- Raw Items: Purchasing, Invoicing, Transferring, Wasting, Inventorying and Reporting.
- Menu Items: Recipes, Waste and Reporting.
- Batch Items: Recipes, Waste, Transfers, Forecasting Suggested Prep, and Reporting.
- Modifiers: Recipes and Reporting.

Creating a custom unit of measure

If the default units of measure in ASM do not suit your needs, you can create a custom unit of measure to meet your business needs.

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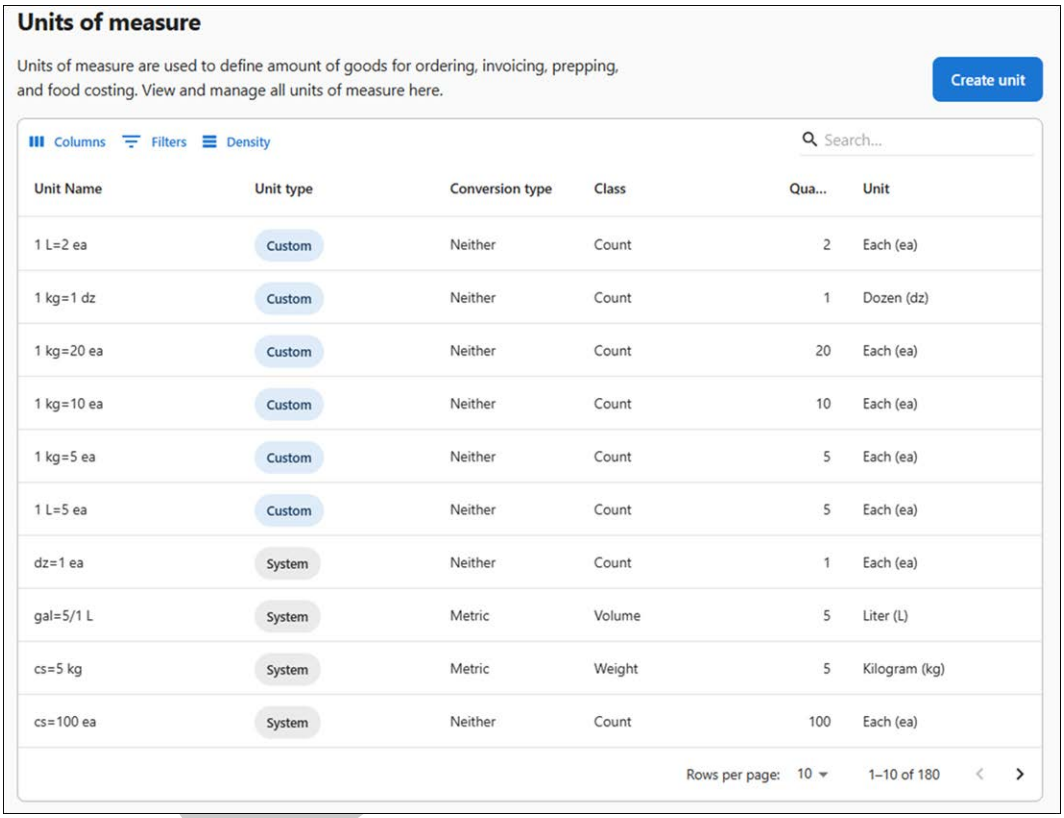
To create a custom unit of measure:

1. Select **Inventory** > **Units of measure.** The 'Units of measure' screen appears.



'Units of measure' home screen

Unit Name — Indicates the conversion formula of the unit of measure.

Unit type — Indicates the type of units of measure:

System — The system type units are predefined and available in the system, which you cannot modify or delete.

Custom — The custom type unit are created as per the business requirement, which you can modify or delete.

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Conversion type — Indicates the measurement classification for this item:

Imperial — Lists non-metric units of measure common to many western hemisphere and some European countries.

Metric — Lists units of measure using the metric system.

Neither — Specifies a custom unit of measure that defaults to the standard count by each (EA).

Class — Indicates the type of unit you defined for this unit of measure, volume, weight, or count.

Volume — Units of measure for items dispensed by volume measurement regardless of weight, typically liquid measurements.

Weight — Units of weight measurement, typically dry measurements.

Count — Determines the numerical value associated with the quantity.

Quantity — Converts the industry standard for the unit to the quantity of the class and type of unit of measure you define.

Unit — Indicates the standard of measurement.

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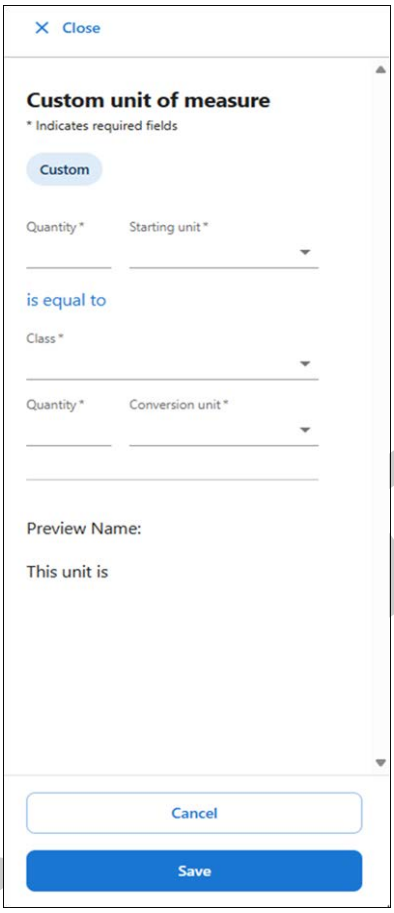
2. Click **Create unit**. The 'Custom unit of measure' sliding panel appears.



'Custom unit of measure' screen

3. Specify the conversion **quantity** to match the converted measurement.
4. Select a **starting unit** type from the drop-down list, such as Case.
5. Select a **class type** from the drop-down list, such as Volume.
6. Enter the conversion **quantity** that matches the converted measurement. For example, one pound (Imperial) equals to 0.453 kilos (metric).
7. Select a **conversion unit** type from the drop-down list, to calculate the equivalent measurement based on the default unit of measure you defined when you added the item to the database. For example, the system converts a '1/4 Cup' default measurement (Imperial) to Milliliters or Liters (Metric).

   To sell a case that contains water bottles with 10 units of one liter each, here is how you set it up: **Starting Unit = Case**, **Class = Volume**, **Quantity = 10**, and **Conversion unit = Liter (L)**

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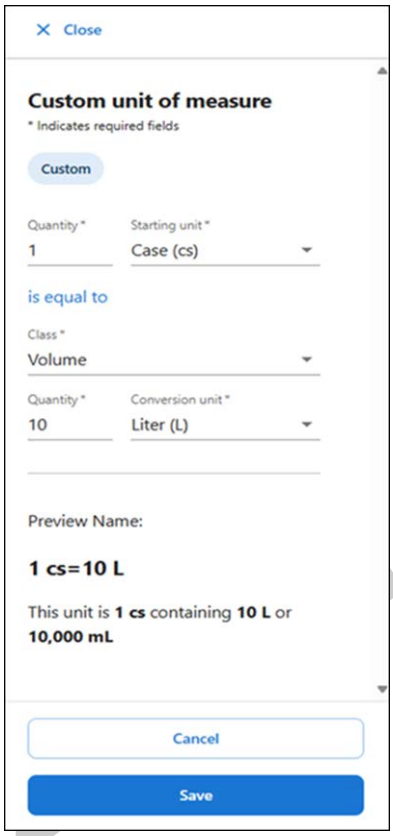
The **preview name** shows the details of the unit type and its respective conversion.



Saving custom unit of measure

8. Click **Save** to confirm the custom unit of measure. A success message appears.

Note

If a units of measure of equivalent measurement already exists in the system, instead of the success message, an error message appears as 'Custom unit of measure already exists. Duplicate units cannot be created.' An example of the error message is '1 L=2 ea already exists. Duplicate units cannot be created.'

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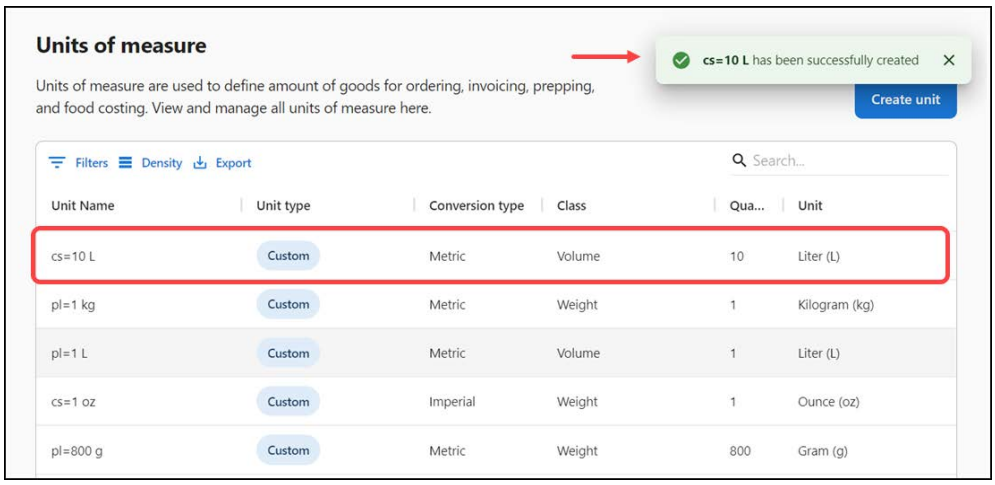


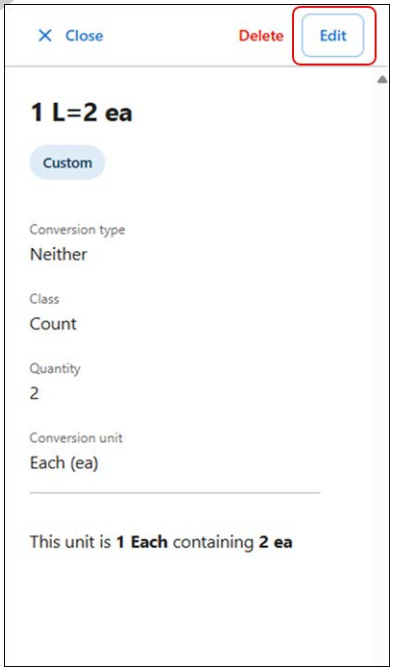
Custom unit of measure is created

Editing a custom unit of measure

You can modify the custom unit of measure only. The predefined units of measure cannot be modified.

To edit a custom unit of measure:

1. Select **Inventory** > **Units of measure.** The 'Units of measure' screen appears.
2. Select a **unit** to edit. A sliding panel appears.



Edit sliding panel for custom UOM

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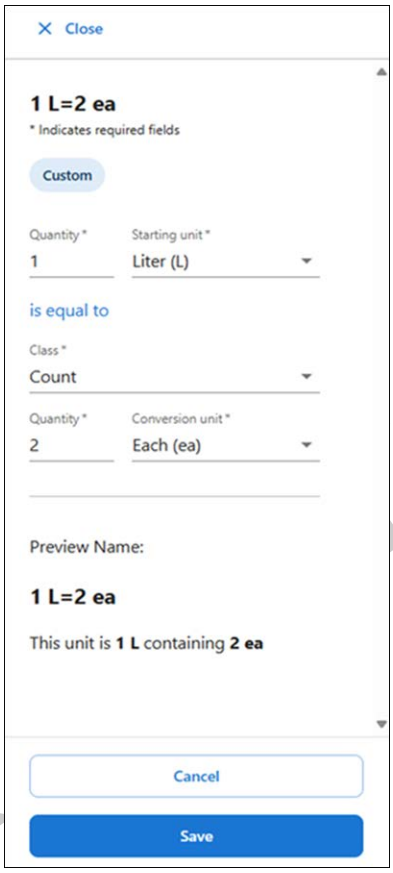
3. Click **Edit**.
4. Make the necessary **changes** to the unit of measure.



Saving the updated custom UOM

5. Click **Save** to confirm the changes.

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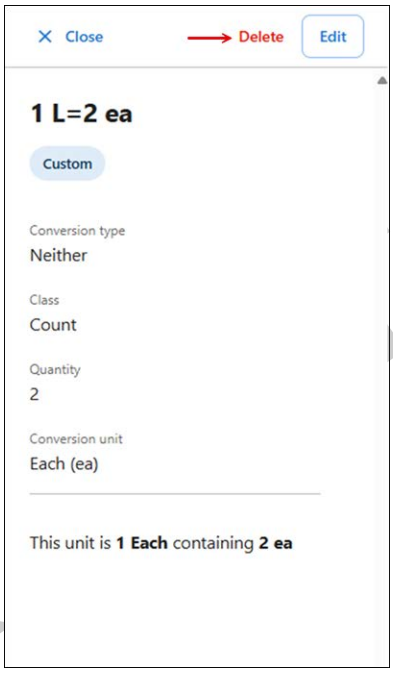
Deleting a custom unit of measure

You can delete a custom unit of measure only. The system default units of measure cannot be deleted.

To delete a custom unit of measure:

1. Select **Inventory** > **Units of measure.** The 'Units of measure' screen appears.
2. Select a **unit** from the list. A sliding panel appears.



Deleting a custom units of measure

3. Click **Delete**. A confirmation message appears.
4. Click **Delete**.

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Working with raw items

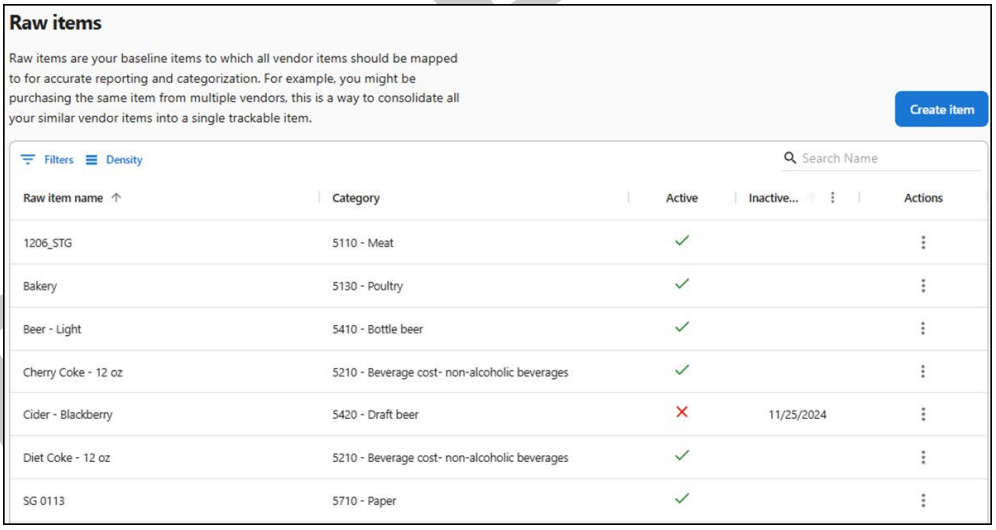
Raw items, also referred to as raw materials, are your baseline items, such as the ingredients needed to prepare a finished product for sale to your consumers. Common examples include sugar, salt, chicken, beef, bread, tomatoes, onions, and much more.

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

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

To create a raw item:

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



'Raw items' screen

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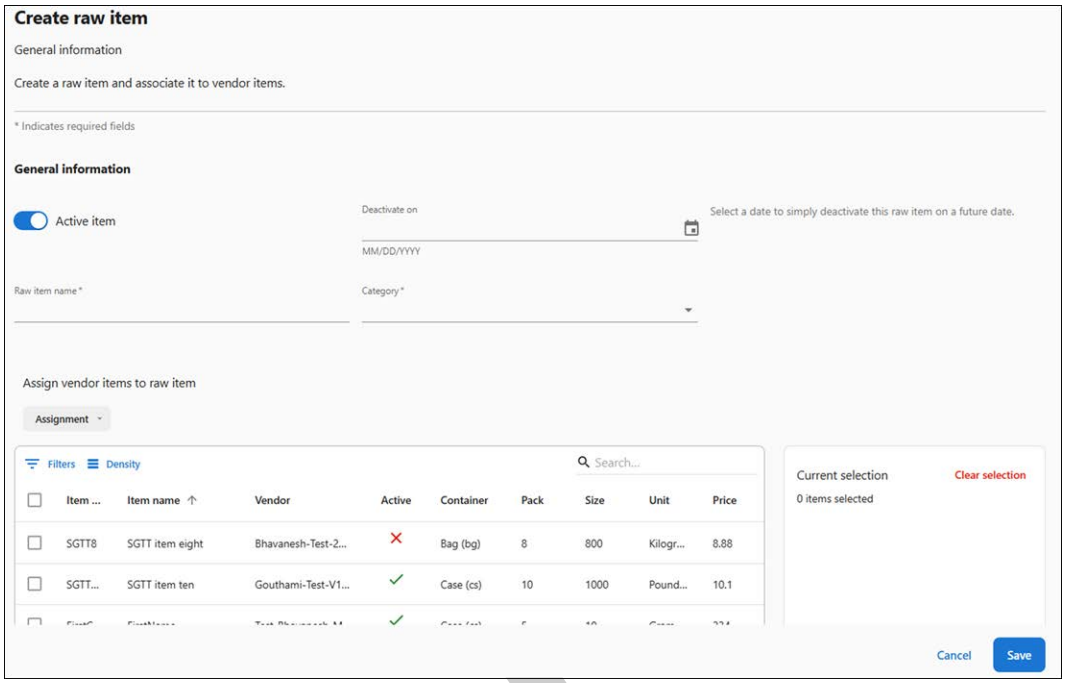
2. Click **Create item**. The 'Create raw item' screen appears.



'Create raw item' screen

3. Toggle on **Active item** to activate the availability of the raw item. When toggled off, you cannot add the raw item to a vendor item. This option is toggled on by default.
4. To set the raw item to deactivate in the future, click the calendar icon to select the **date on which to deactivate the raw item**. The item automatically deactivates on that date.
5. Type a **name** for the raw item. This is a required option.
6. Select a **category** to associate with the raw item from the drop-down list. This is a required option. The predetermined raw item categories in ASM are:

Category Group	Category ID	Category Name
Food	5110	Meat
	5120	Seafood
	5130	Poultry
	5140	Produce
	5150	Bakery
	5160	Dairy
	5170	Grocery & dry goods
	5190	Food cost-non-alcoholic beverages
Non-alcoholic, beverage	5210	Beverage cost-non-alcoholic-beverages

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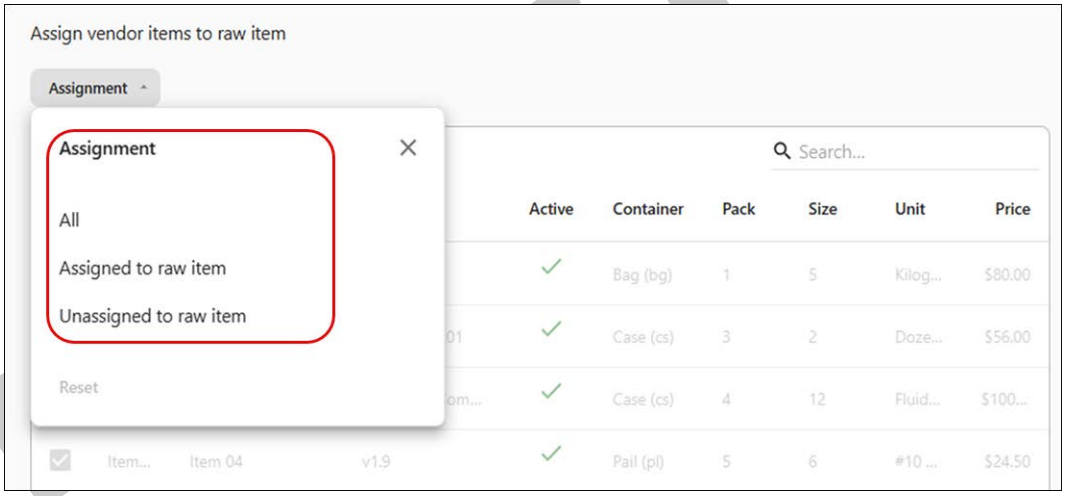
Category Group	Category ID	Category Name
Liquor	5310 5320	Liquor Bar consumables
Beer	5410 5420 5430	Bottle beer Draft beer Brew cost
Wine	5510	Wine
Merchandise	5610 5620	Merchandise Vending machine
Paper	5710	Paper

7. Under the 'Assign vendor items to raw item' group bar, select the 'Unassigned to raw item' option from the **Assignment** drop-down list.



Option to view assigned and unassigned raw items

The vendor items that are not mapped to a raw item are listed.

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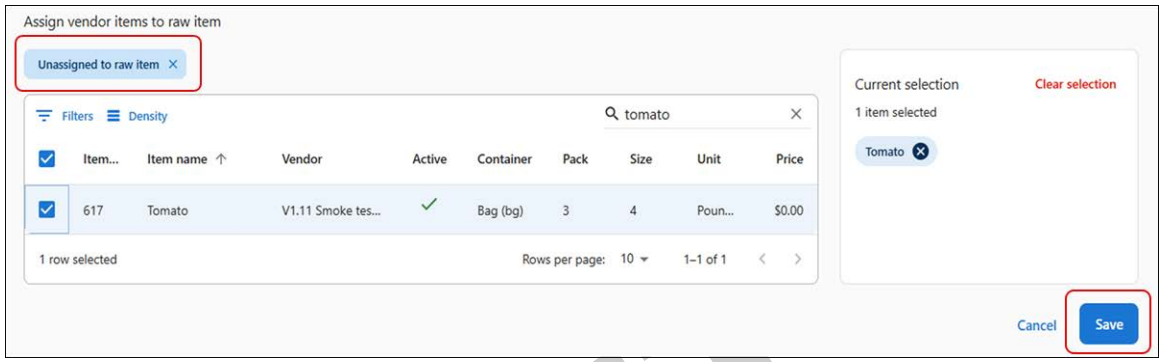
8. Select the **vendor item** to assign to the raw item.

Reference

Refer to 'Using raw items function to associate a raw item with a vendor item' for instructions on using the 'Assign vendor items to raw item' feature.



Assign vendor items to raw item

9. Click **Save** to create the raw item.

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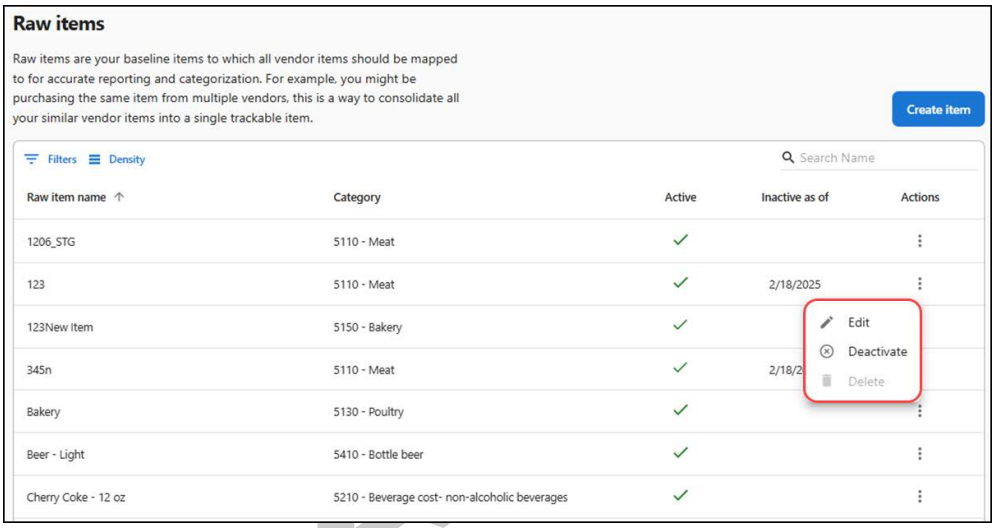
To edit a raw item:

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

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



Edit a raw item

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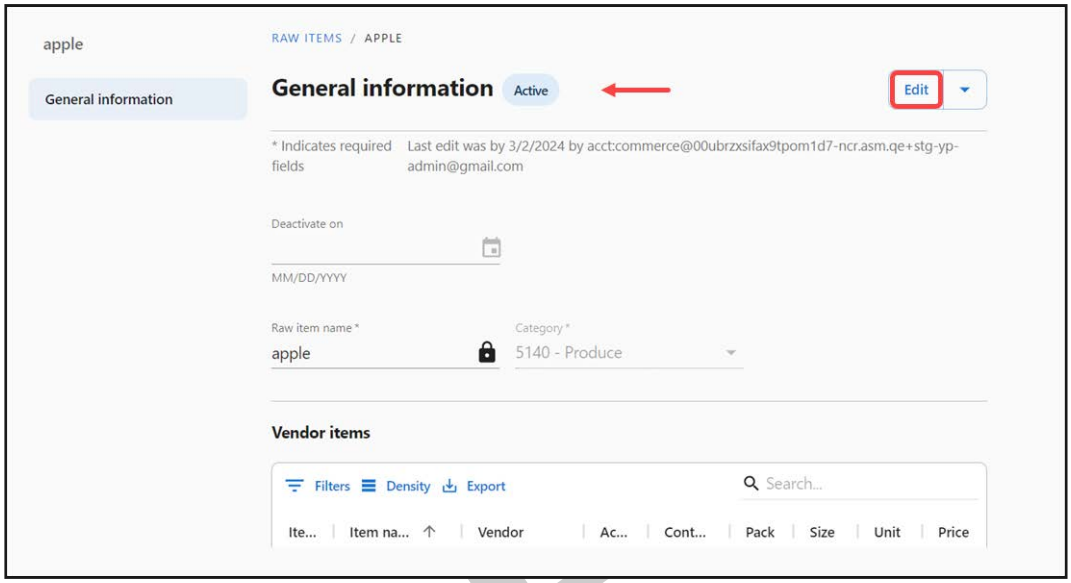
2. Click the **three dots** icon under Actions for the raw item to edit, and select **Edit** from the menu that appears. The 'General information' screen appears.



'General information' screen

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

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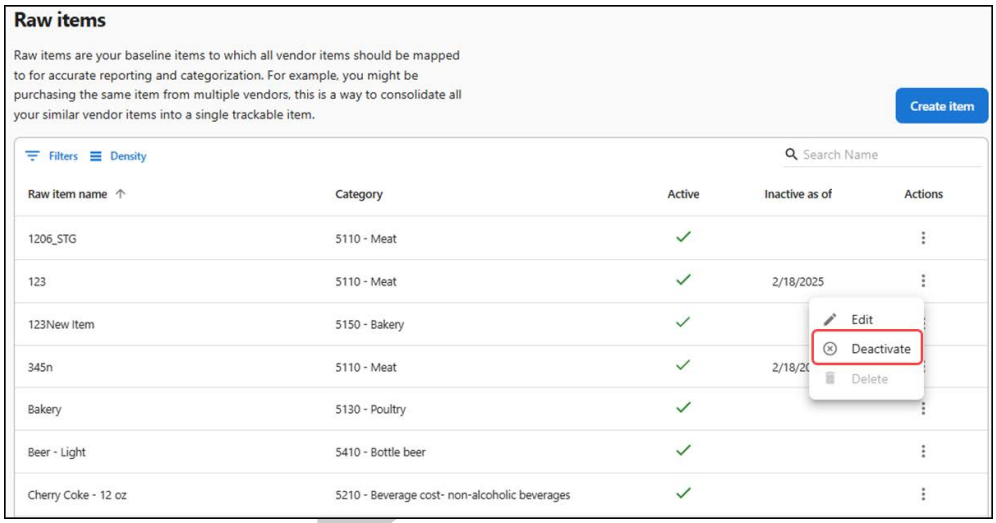
To deactivate a raw item:

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

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



Deactivate a raw item

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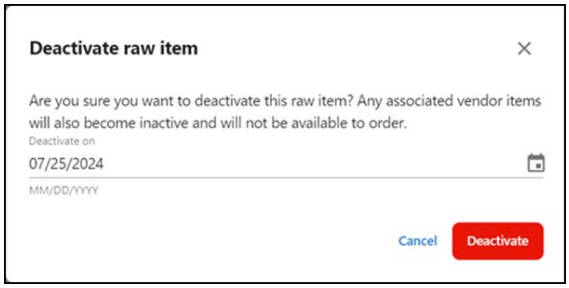
2. Click the **three dots** icon under Actions for the **raw item** to deactivate, and select **Deactivate** from the menu that appears. A confirmation message appears.



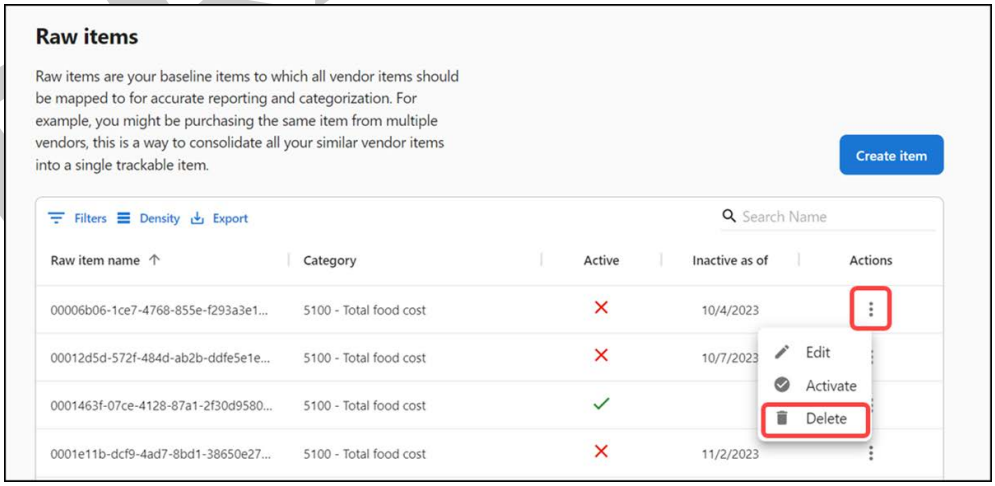
'Deactivate raw item' confirmation message

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

To delete a raw item:

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

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



Delete raw item

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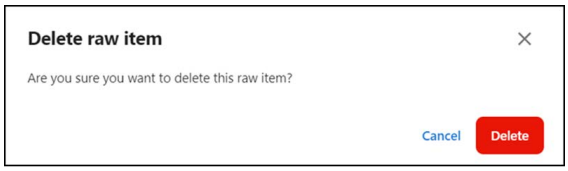
2. Click the **three dots** icon under Actions for the **raw item** to delete, and select **Delete** from the menu that appears. A confirmation message appears.



'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.

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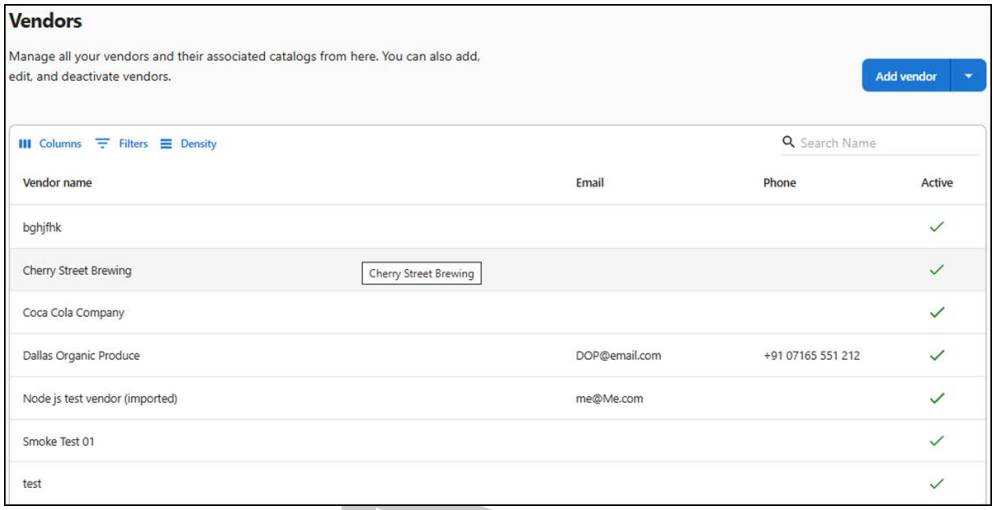
Working with vendors

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



Adding vendor

Reference

Refer to "Appendix A: Bulk importing vendors and vendor items on page 213" for information on using a .CSV file to upload vendors in bulk.

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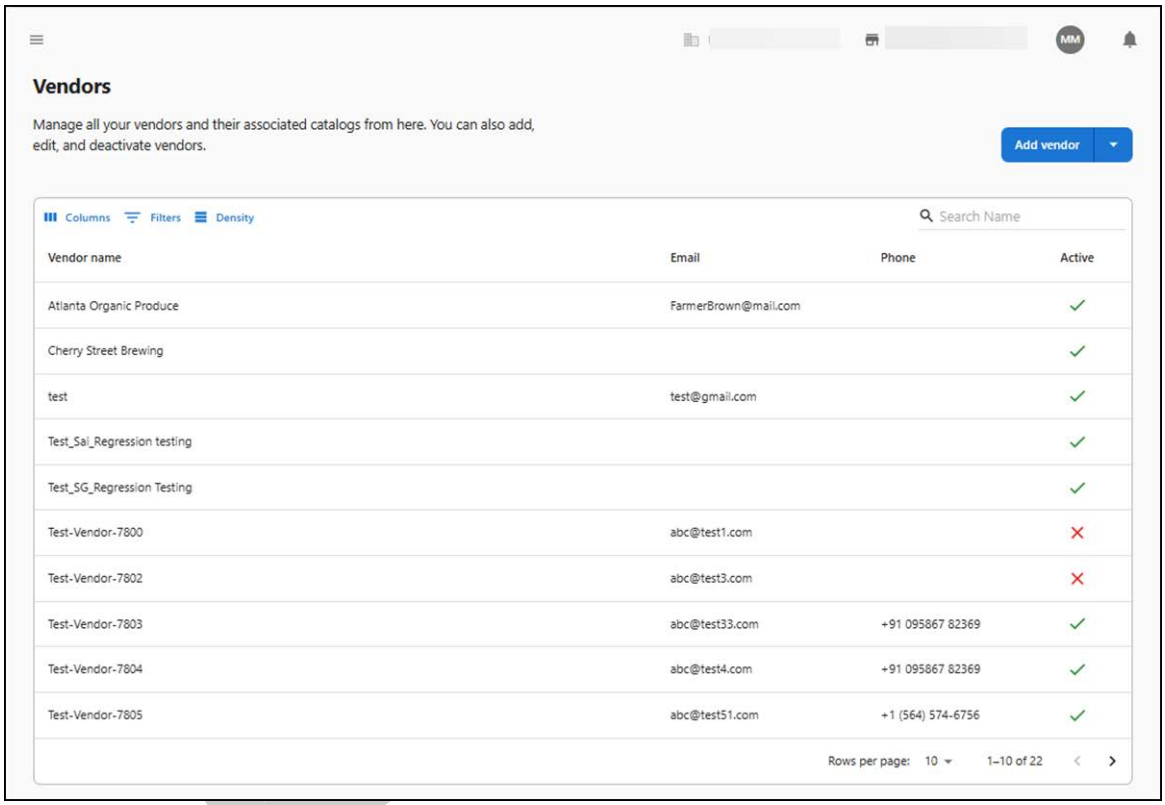
To add a vendor manually:

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



'Vendors' screen

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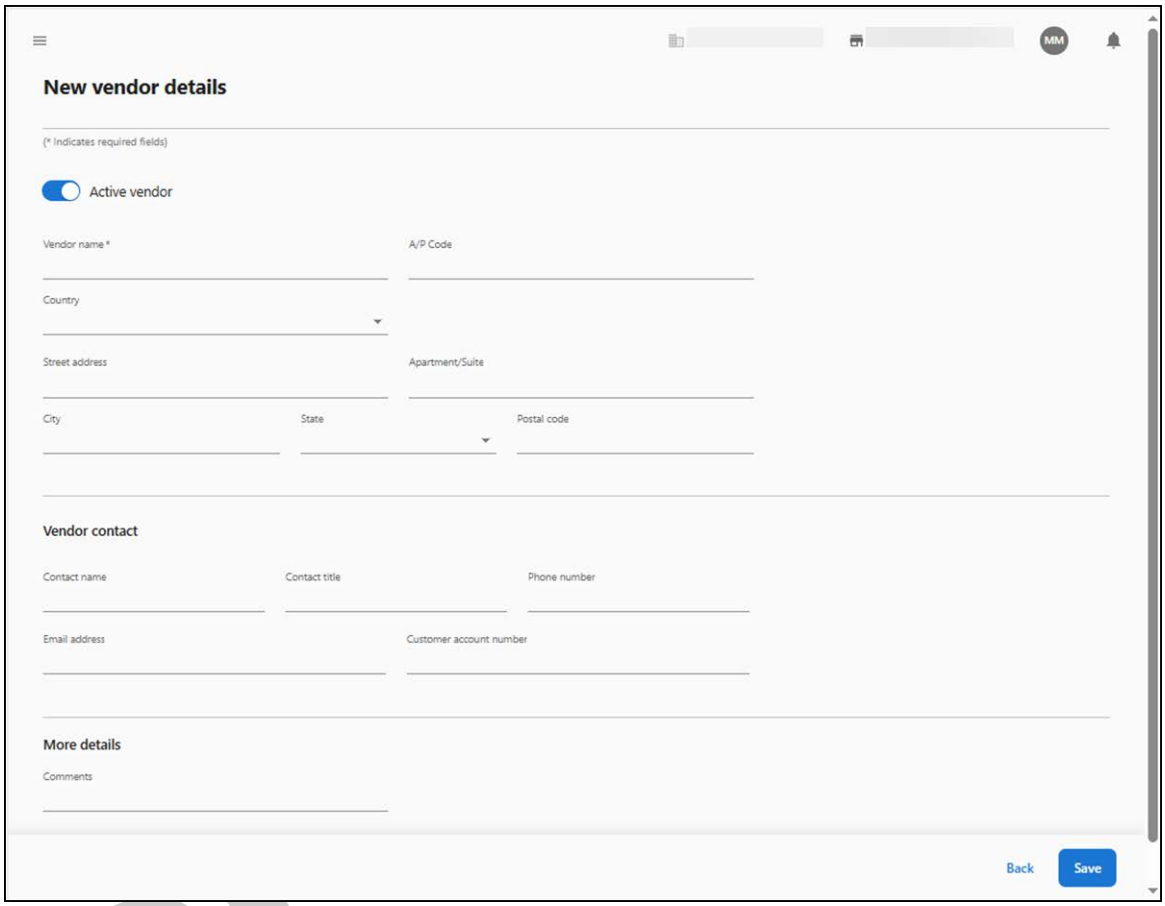
2. Click **Add vendor**. The 'New vendor details' screen appears.



'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.

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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.

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.

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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.

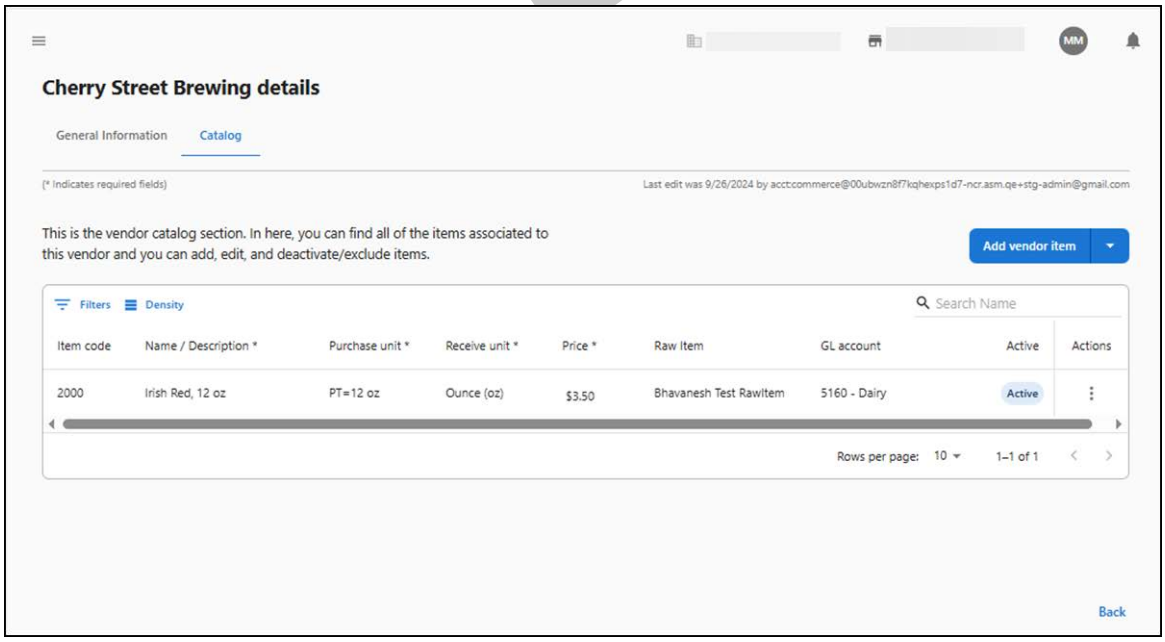
Reference

For more information on associating a raw item with a vendor item, refer to Using raw items function to associate a raw item with a vendor item.

For more information on using a .CSV file to upload vendor items in bulk, refer to Uploading vendor items in bulk.

To manually add a vendor item:

1. Select **Inventory** > **Vendors** to view the available vendors in the 'Vendors' screen.
2. Select the **vendor** that sells or owns the item. The vendor details appear with the 'General information' tab as the active tab.
3. Select the **Catalog** tab.



'Catalog' tab

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

'Add item' screen

5. Type the **vendor item code**, up to 50 characters.
6. Type the **name of the item**, up to 250 characters.
7. Select the **bulk packing type** from the 'Container' drop-down list. The available options are Case (CS), Pail (PL), Bag (BG), Pound (LB), Gallon (GL), Half Gallon (HGL), Quart (QT), Liter (LT), Pint (PT), and Dozen (DZ).
8. 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.
9. 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.
10. 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).
11. Verify **Catch weight item** is not selected as it is currently not supported.

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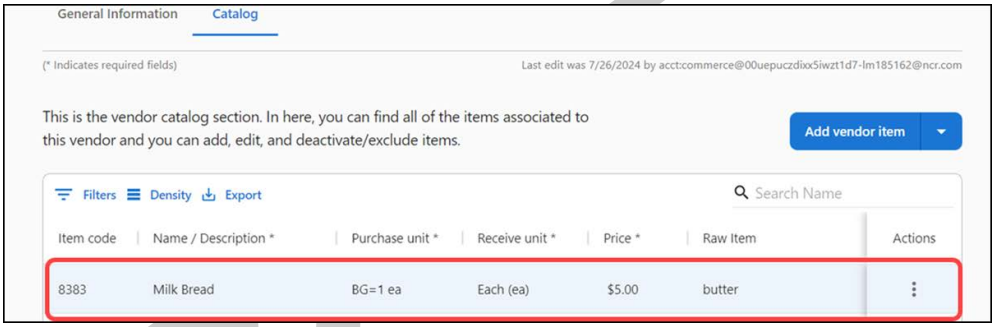
12. Type the **unit price** of the vendor item container. It must be a numeric value (up to two decimals).
13. Select the **raw item** to associate with this vendor item from the 'Raw item' drop-down list. If the raw item you need does not appear in the list, you can select 'Unassigned' to allow you 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.

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

    -OR-

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



Manually added vendor item

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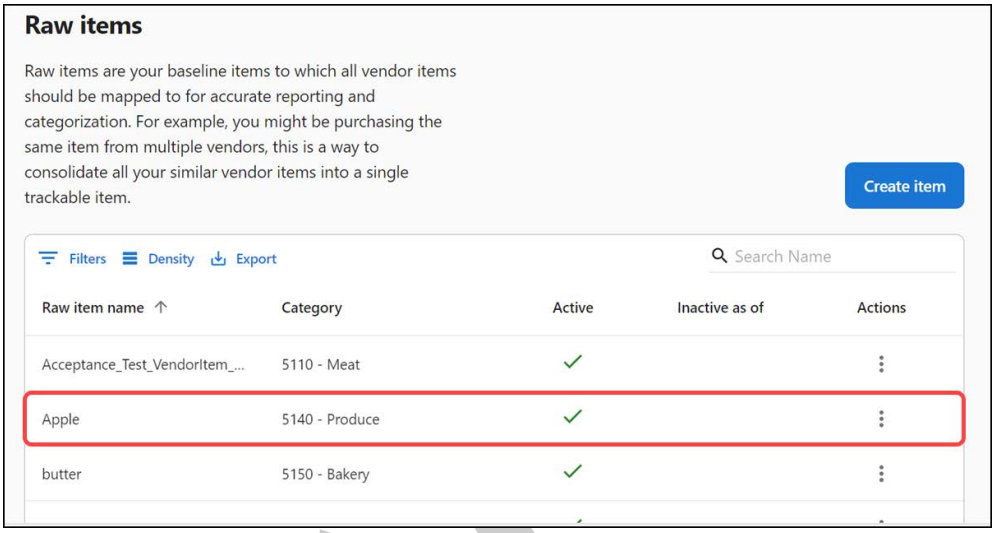
To use the raw items function to associate a raw item with a vendor item:

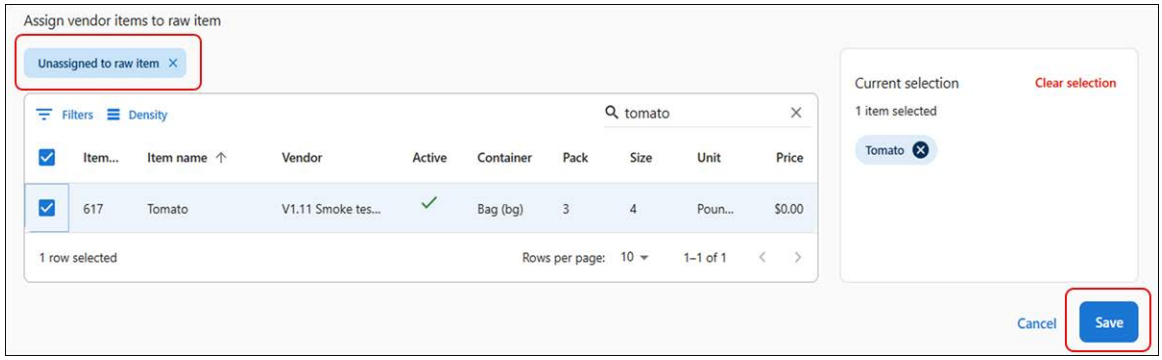
As an alternate method to working in the Vendors function, you can use the Raw Items function to associate a raw item with a vendor item. The vendor item must already exist.

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** icon under **Actions** and select **Edit** from the menu that appears. The 'General information' screen appears.
4. Scroll down the screen to the 'Assign vendor items to raw item' group bar.
5. Select 'Unassigned to raw item' from the **Assignment** drop-down list. The vendor items that are not assigned to a raw item are listed.



'Assign vendor items to raw item' group bar

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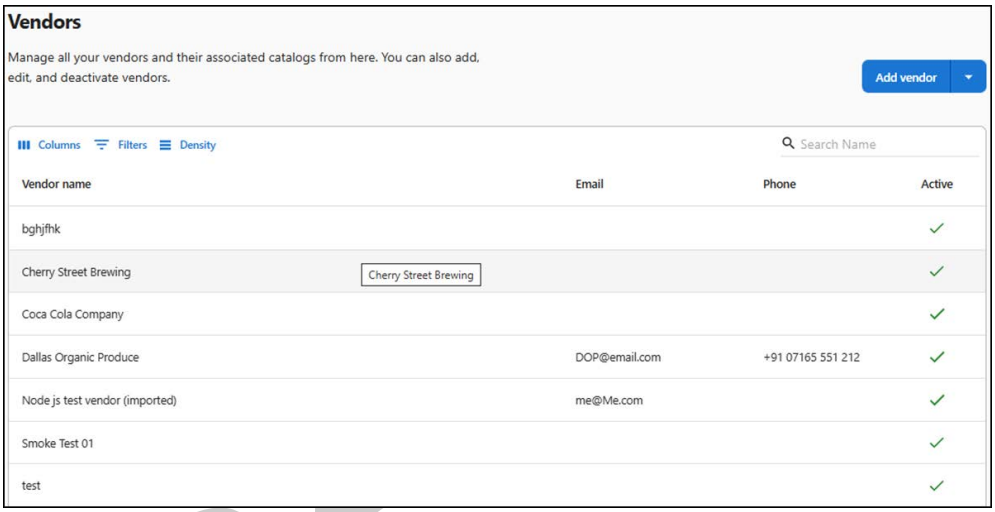
6. Select the **vendor item** to assign to the selected raw item. The selected 'vendor item' appears in the 'Current selection' pane.
7. (Optional) To cancel the vendor item association with the raw item, click **Clear selection**.
8. Click **Save** to confirm the changes and exit the screen.

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.

'General information' tab

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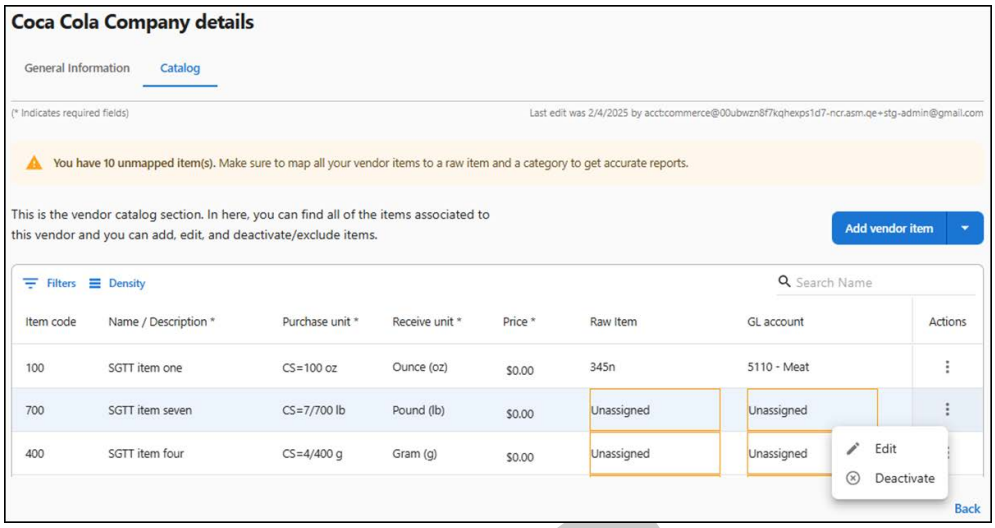
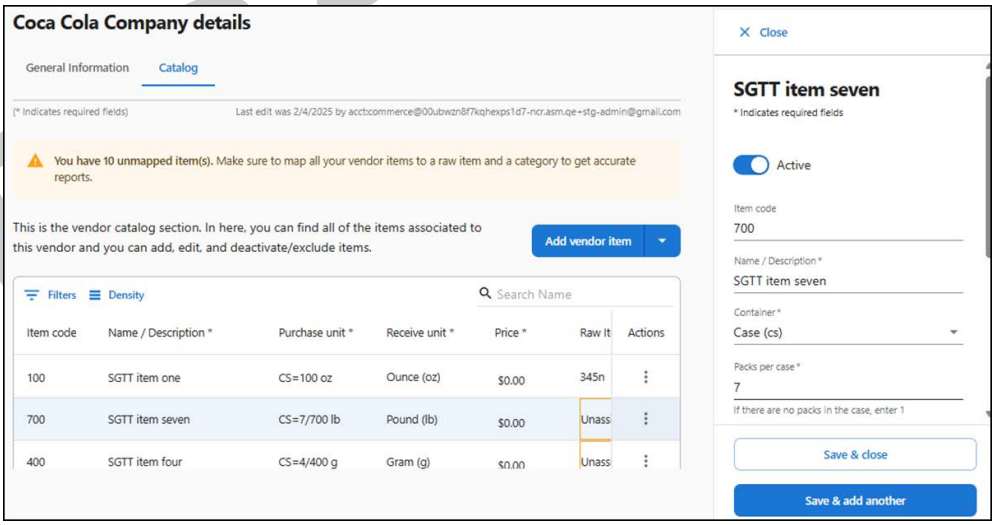
3. Select the **Catalog** tab. The list of items associated with the vendor appear on the screen.



Edit vendor item

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



Edit vendor item options

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

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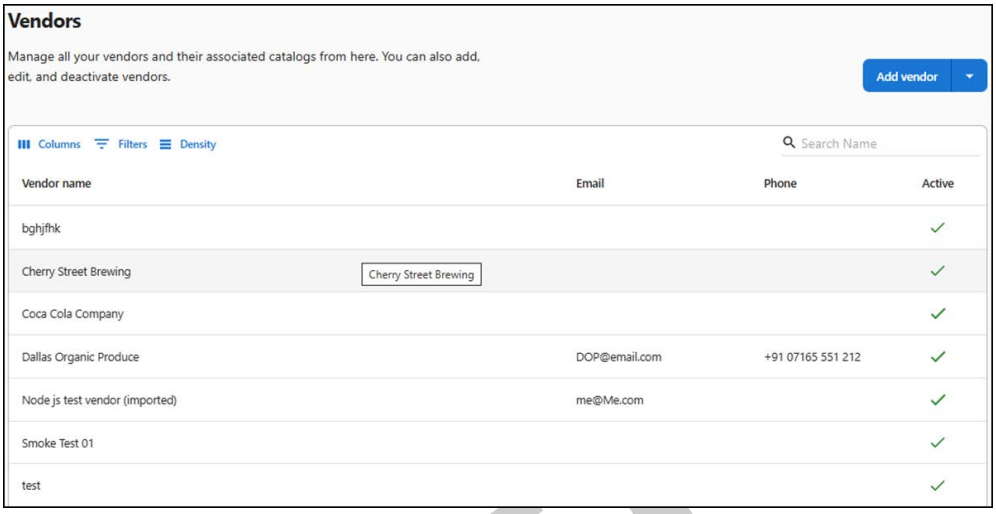
To deactivate a vendor item:

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



Vendor selection

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

'General information' tab

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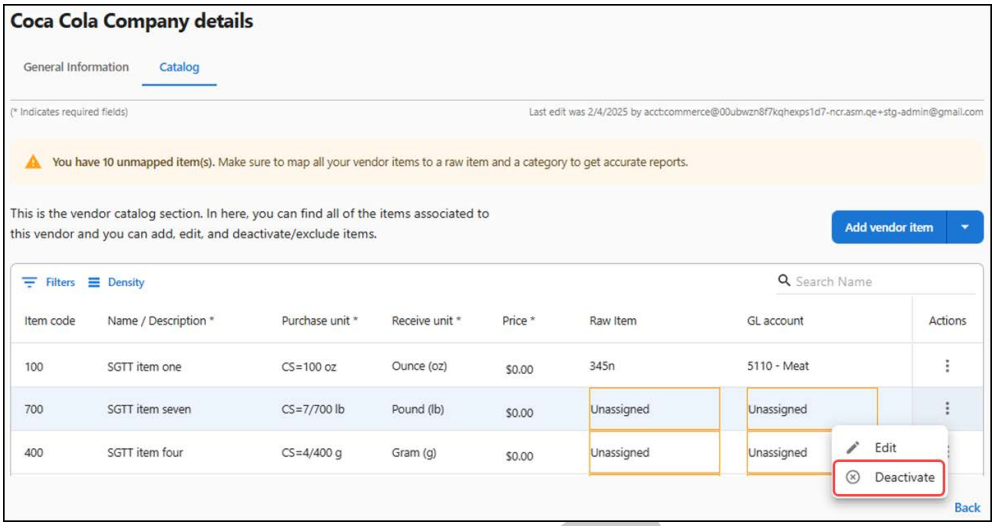
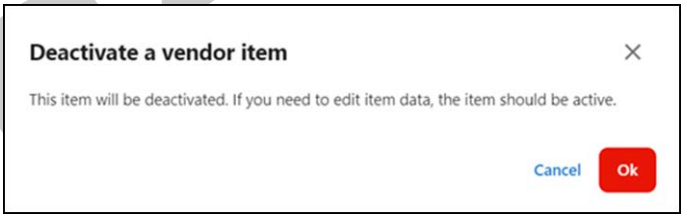
3. Select the **Catalog** tab to view a list of the vendor items.



Vendor details 'Catalog' tab

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



Deactivate confirmation message

6. Click **Ok** to confirm.

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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 Manually adding an invoice.
- Uploading a digital image of the invoice. If you upload a PDF, each PDF page is converted to an image file. See Appendix B: Uploading an invoice.

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.

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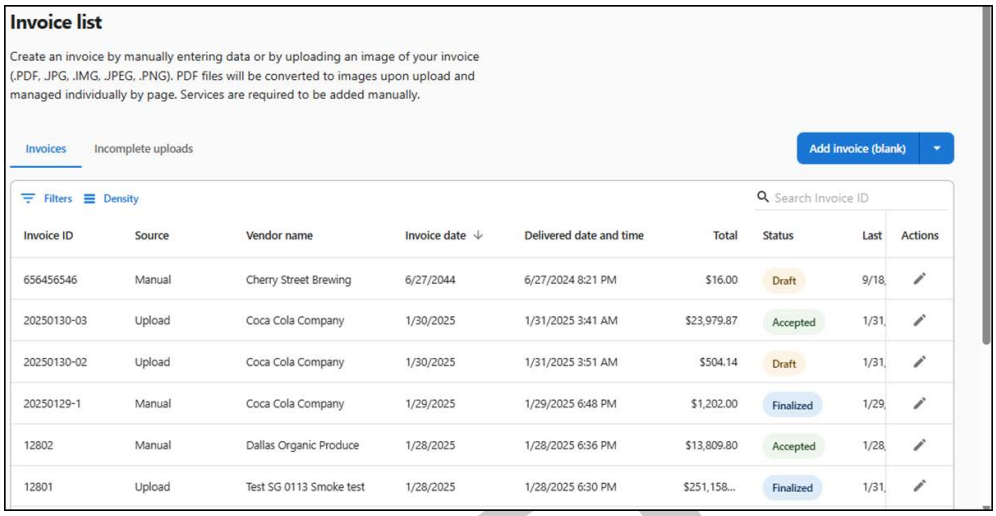
To manually add an invoice:

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



'Invoice list' screen

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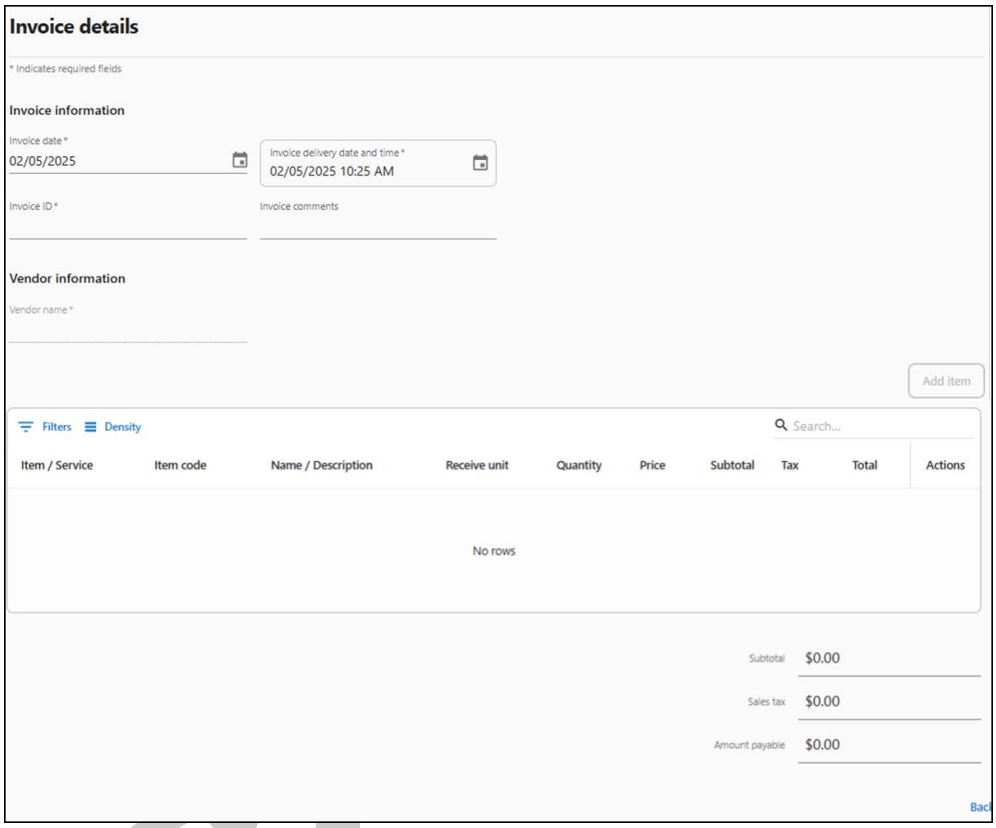
2. Click **Add invoice (blank)**. The 'Invoice details' screen appears.



'Invoice details' screen

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

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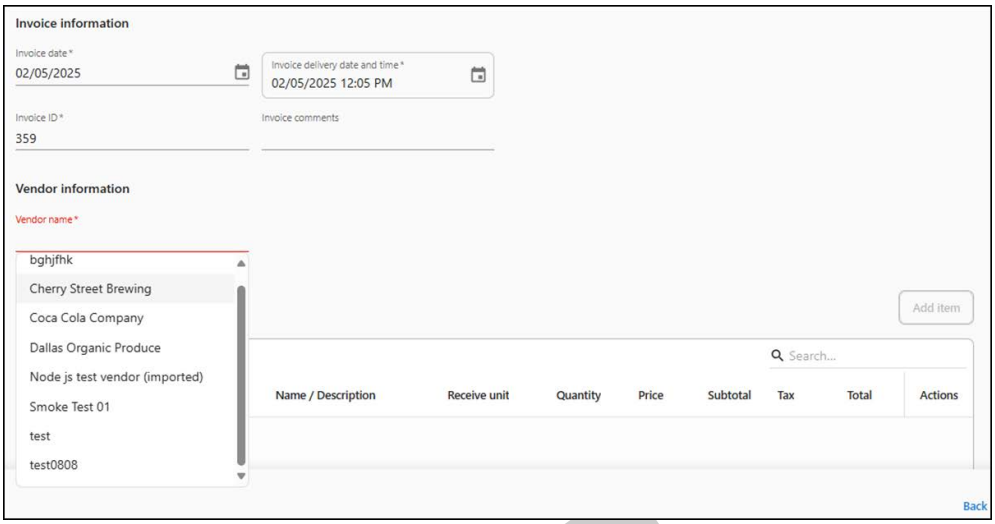
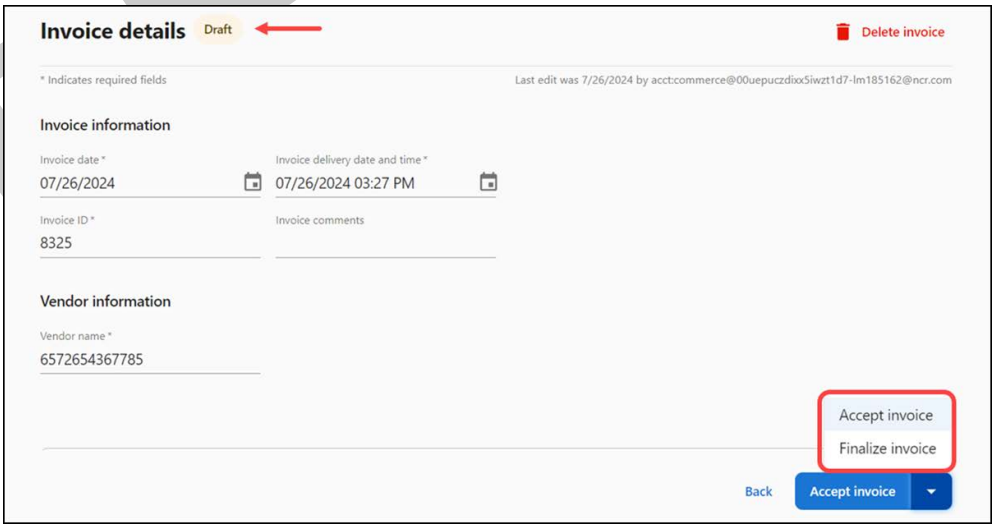
6. Type any **additional information** about the invoice in 'Invoice comments.'



Adding or selecting a vendor

7. Click **Vendor name** to view a list of vendors.
8. Select a **vendor** from the list. Alternatively, if the required vendor is not listed, enter the **new vendor name** in 'Vendor name.' The Add <New vendor name> option appears. Click **Add** to create a new vendor.

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



Invoice record saved as Draft

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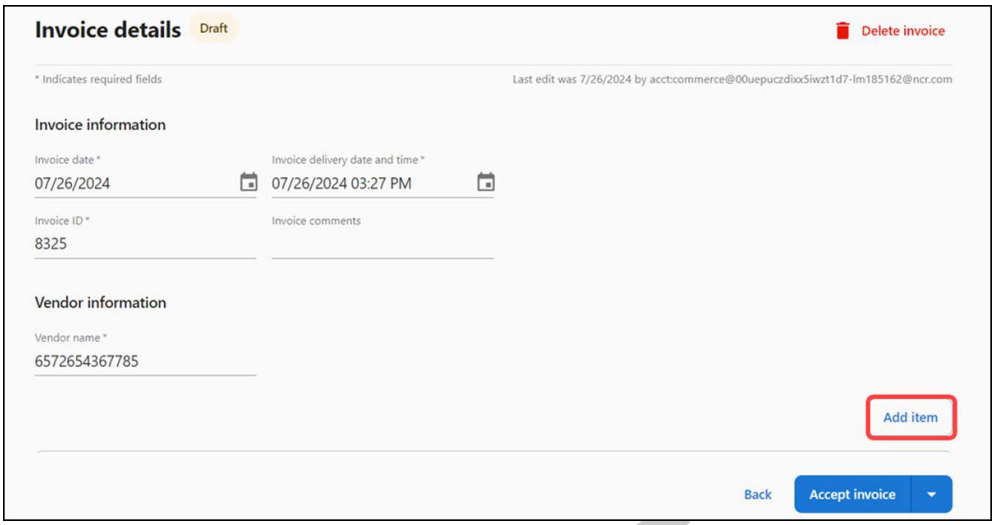
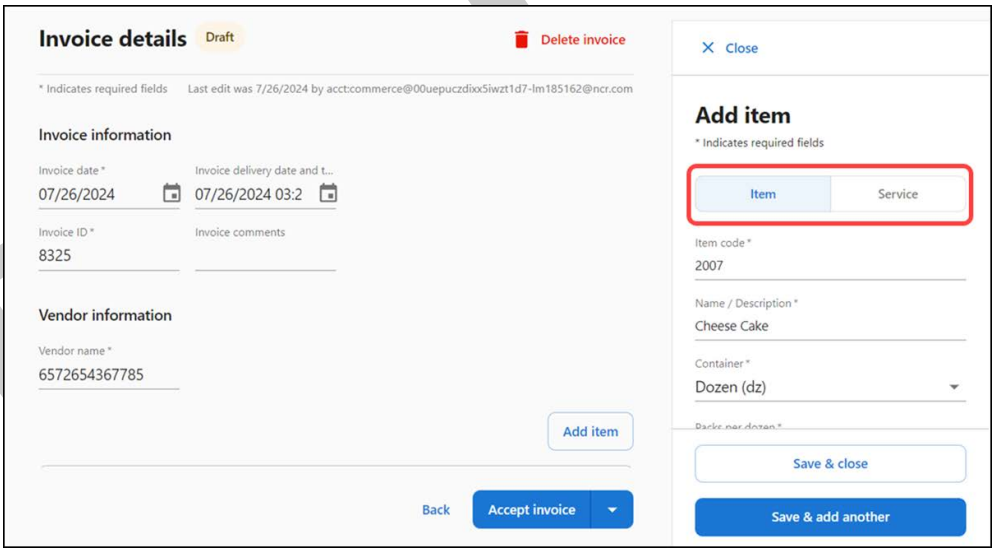


Option to add an item to the invoice

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



Option to enter item or service details

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

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

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

11. Type the **vendor item code**, up to 50 characters.
12. Type the **name and description of the item**, up to 250 characters.

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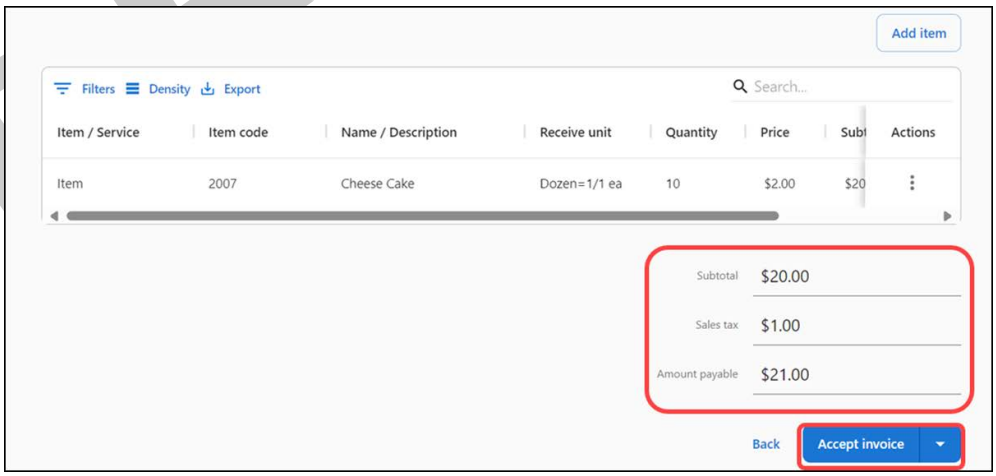
13. Select the **bulk packing type** from the 'Container' drop-down list. Select from Case (CS), Pail (PL), Bag (BG), Pound (LB), Gallon (GL), Half Gallon (HGL), Quart (QT), Liter (LT), Pint (PT), and Dozen (DZ).
14. Type the **total quantity of packs** in vendor item container. This must be a numeric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



Added invoice items and services

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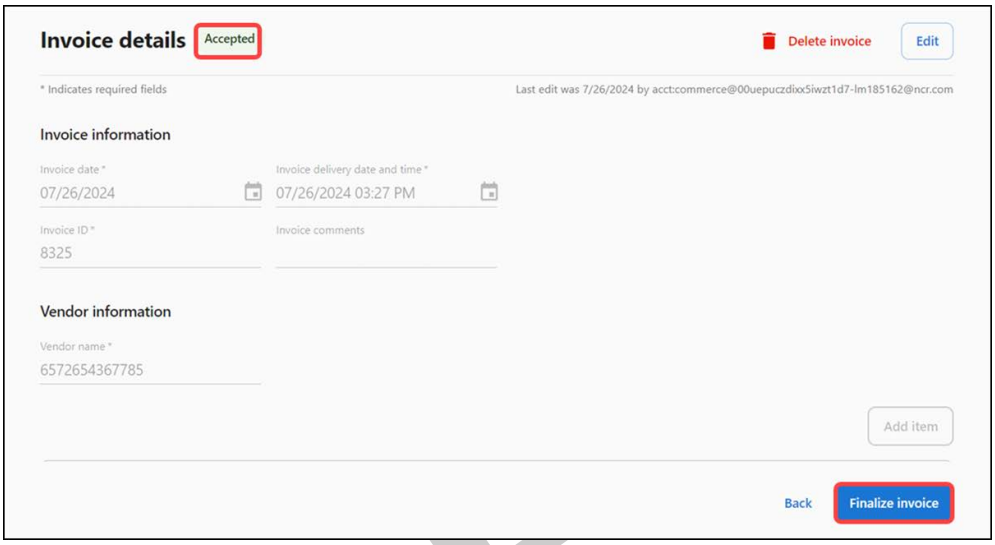
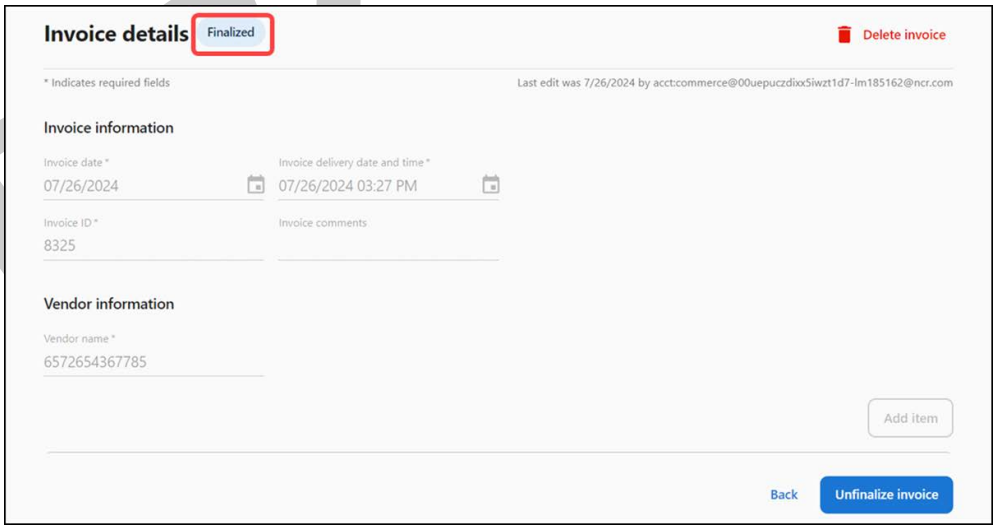
22. Click **Accept invoice** to confirm the invoice details. The status of the invoice changes to 'Accepted' and the **Finalize invoice** option appears. A manager can modify or delete the accepted invoice.



Accepted invoice

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



Finalized invoice

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

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

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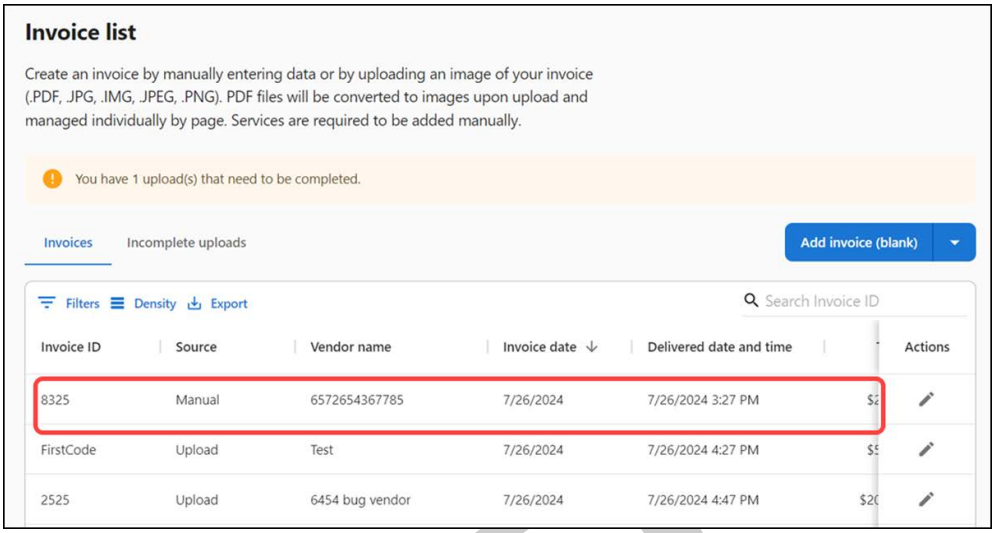
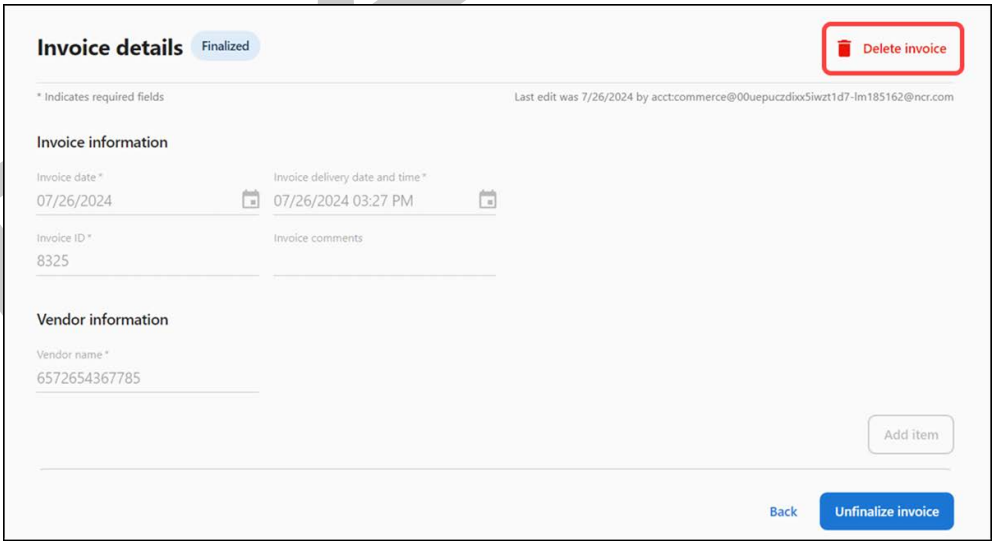
Deleting an invoice

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.

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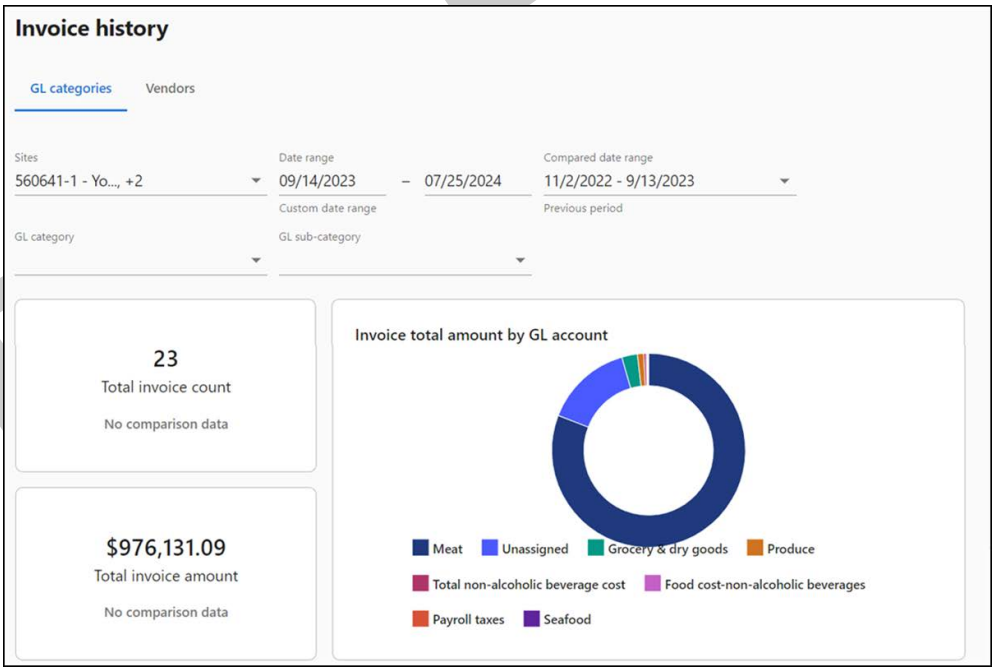
Viewing 'Invoice history' report

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

To run an 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.

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

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**.

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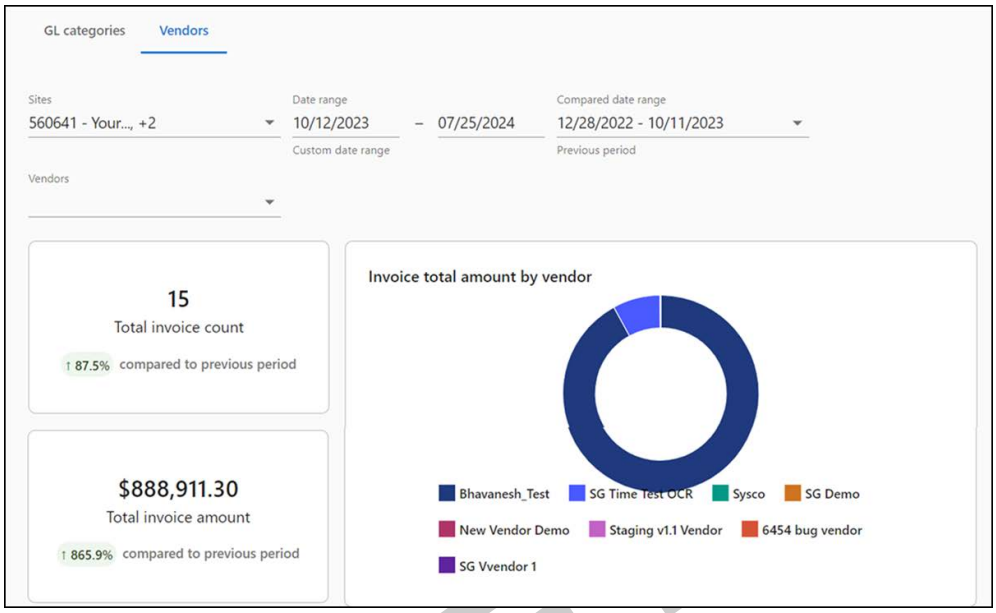
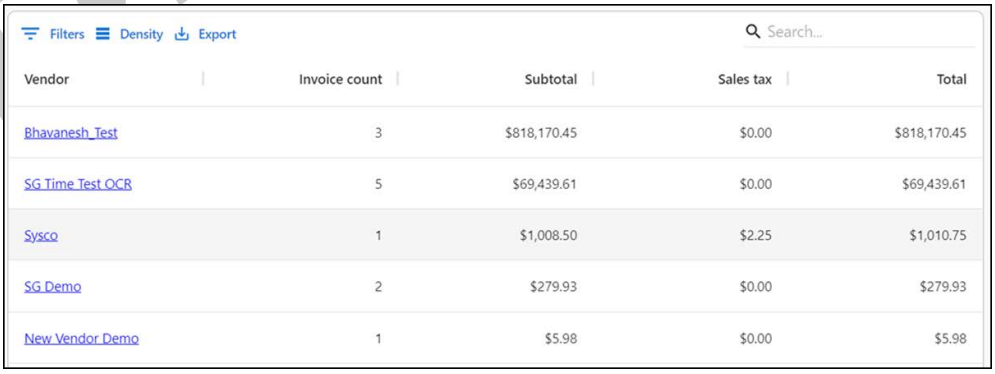
6. Select one or more **vendors** from the drop-down list. The following details appear on the screen:



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.



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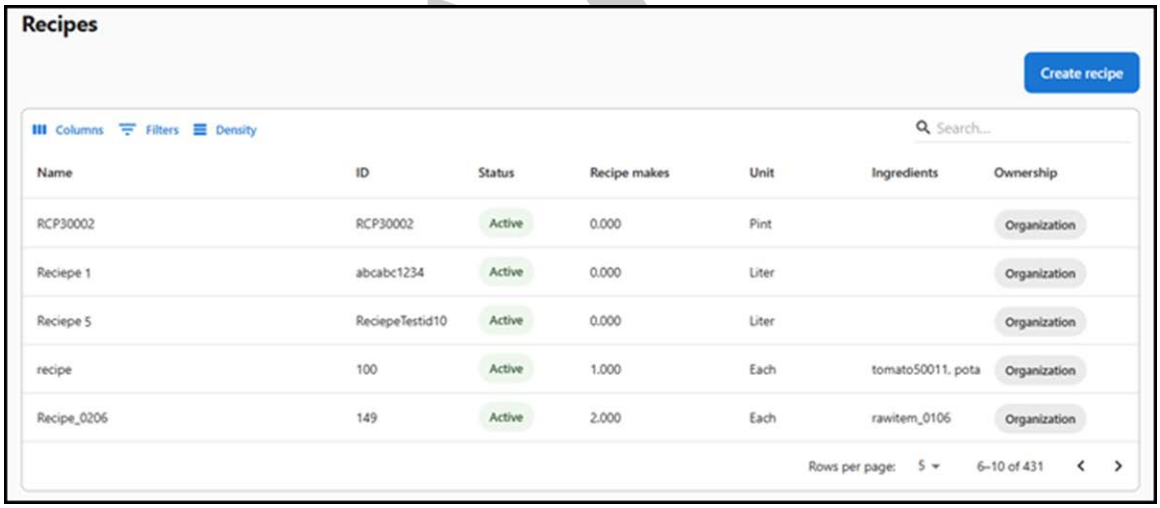
The following information appears in the report:

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).

Managing recipes (Inventory Core only)

A recipe is a list of inventory ingredients that make up both prep items and sales items. It contains a detailed list of ingredients, required quantity, and cost incurred to create the recipe. You can also specify the sequence in which the ingredients must be used to prepare the recipe. Additionally, you have the option to set the recipe availability for a certain period of time. For instance, for a special dish to be available for a specific period, you can set the end date until when the recipe is available for usage.



Recipes home screen

Name — Unique name of the recipe for identification. For example, Tea, Chicken salad.

ID — Unique identification number that the system auto-generates.

Status — Current status of the recipe. The 'Active' status indicates the recipe is available to use and 'Inactive' status indicates the recipe is currently deactivated and not available for preparation; eventually, the recipe will not be available for selection as a Sales Item and Menu Item.

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Recipe makes — Expected number of quantities from the recipe. For example, if the recipe is 'Tea' and the 'Recipe makes' value is '2', then two cups of tea is expected to be prepared using the selected ingredients.

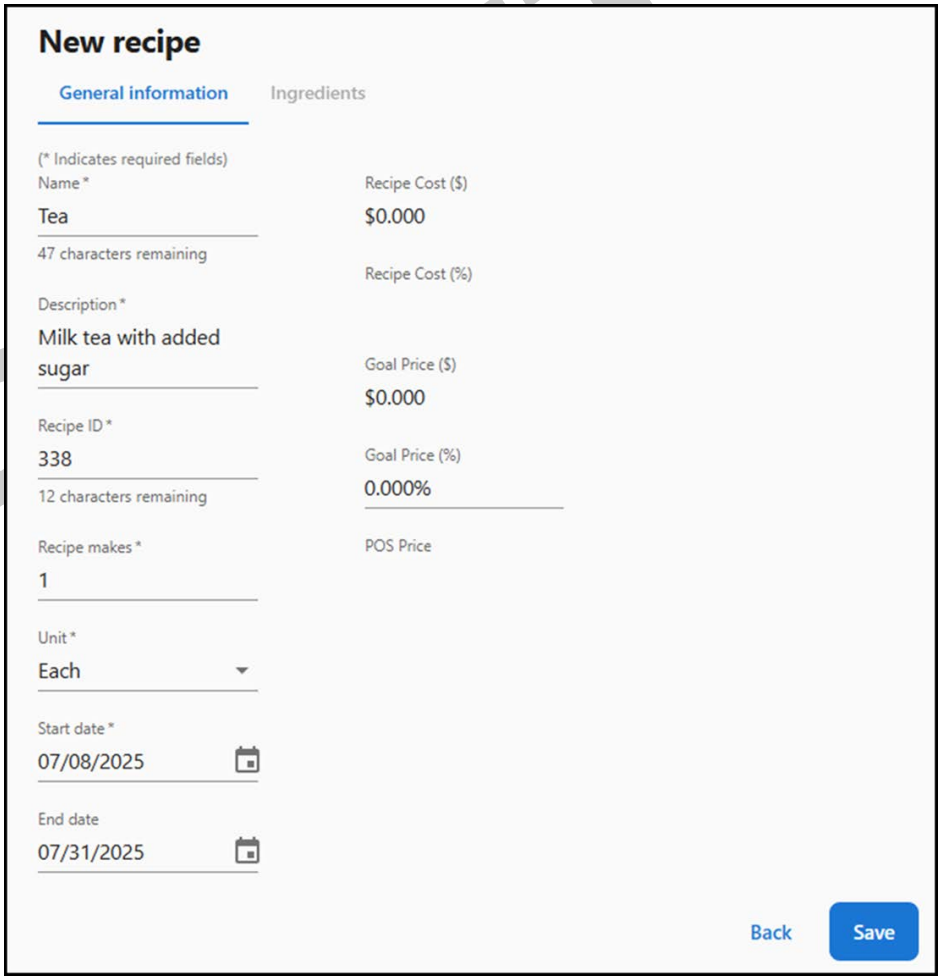
Unit — Units of measurement of the recipe. For example, 'Each' indicates each cup of tea.

Ingredients — List of inventory items used to prepare the recipe. For example, the ingredients required to prepare 'Tea' includes milk, sugar, and water.

Ownership — Site that owns and manages the recipe.

To create a new recipe:

1. Select **Inventory** > **Menu** > **Recipes**. The **Recipes** screen appears.
2. Click **Create recipe**. The 'New recipe' screen appears. By default, the 'General information' tab is selected. A unique recipe ID auto-populates for the recipe.



Creating new recipe

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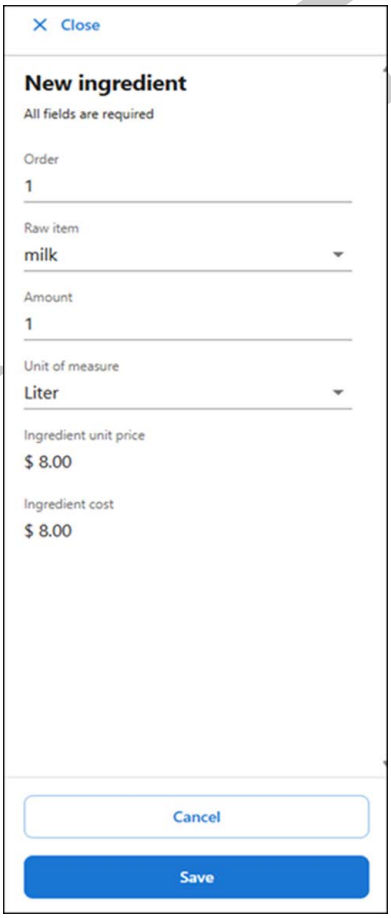
3. Enter a **unique name** for the recipe. It must contain a maximum of 50 characters. For example, Tea.
4. Enter a **description** for the recipe, such as 'Milk tea with added sugar.'
5. Enter the **expected output quantity** in 'Recipe makes/. For example, 1 indicates one cup of tea.
6. Select the **unit of measure** as 'Each.' It indicates that for this recipe one cup of tea is prepared.
7. Select the **start date** and **end date** to indicate the period for which the recipe is available. After the end date, the recipe is deactivated.
8. Click **Save** to confirm the recipe details. The 'New recipe saved' success message appears. Next step is to add the ingredients.
9. Click the **Ingredients** tab.
10. Click **Add ingredients**. A sliding panel to enter the ingredient details appear. Additionally, a **unique order ID** is auto-populated to indicate the sequence number of the ingredient.



Adding ingredients

11. Select the **raw item**. The raw items available in the ASM system are auto-populated in this option.

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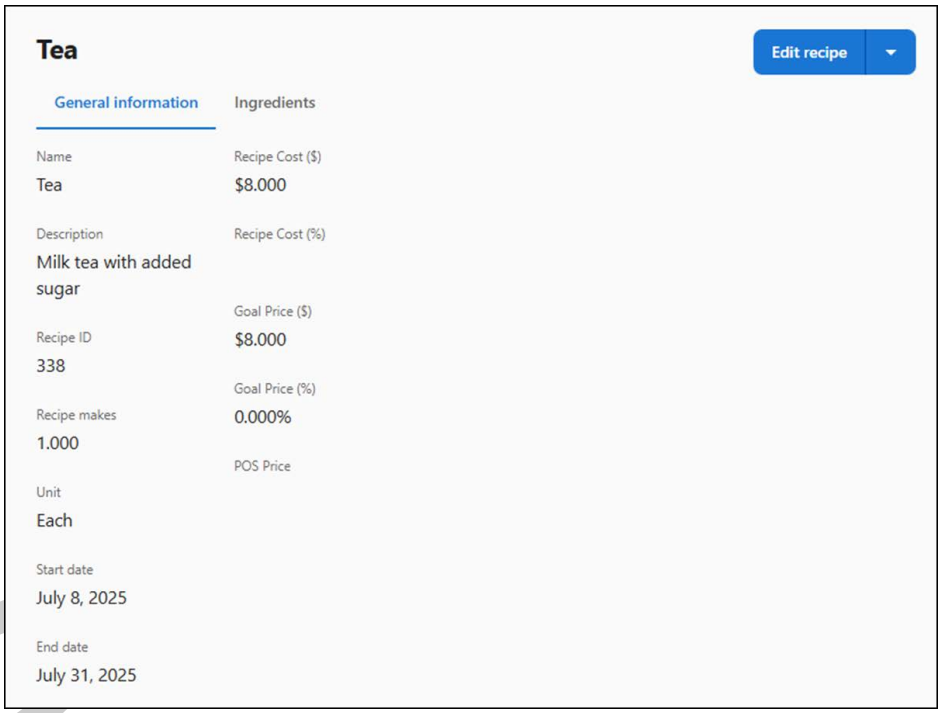
12. Enter the **quantity of raw items** and **unit of measure** required for the recipe. For example, type '1' in **amount** and select 'Liter' from the **Unit of measure** drop-down list to indicates one liter of milk.

    Additionally, the unit price of the ingredient and total ingredient cost appears in the **Ingredient unit price** and **Ingredient cost** options, respectively.
13. Click **Save** to confirm the added ingredient. The 'New ingredient saved' success message appears.
14. Repeat step 10 through step 13 to **add more ingredients** to the recipe.



Recipe is created

After adding all the ingredients, the following details appear in the **General information** tab:

Recipe Cost ($) — Total cost to prepare the recipe.

Recipe Cost (%) — This is for future use.

Goal Price ($) — Target price, in amount, expected price for the recipe. This value is calculated based on the **Goal Price (%)**.

Goal Price (%) — Target price, in percentage, expected for the recipe.

POS Price — This is for future use.

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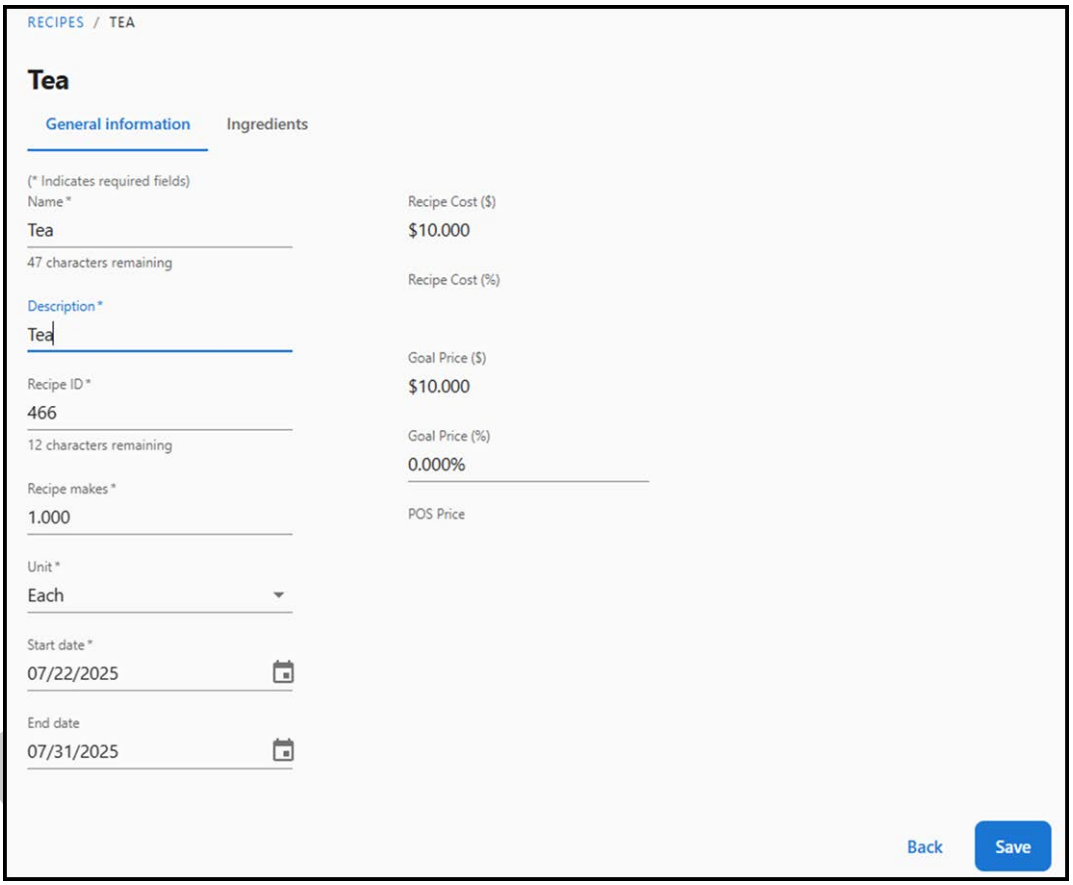
To edit an existing recipe:

1. Select **Inventory** > **Menu** > **Recipes**. The **Recipes** screen appears.
2. Select the **existing recipe** to modify. By default, the **General information** tab is selected.
3. Click **Edit recipe**.
4. Update the recipe details as required in the **General information** tab.



Updating the ingredients information

5. Click **Save** to confirm the changes. The 'Recipe was successfully updated' message appears.
6. Click the **Ingredients** tab. The list of ingredients for the selected recipe appears.
7. Select the **ingredient** that must be modified.
8. Click **Edit** on the sliding panel.

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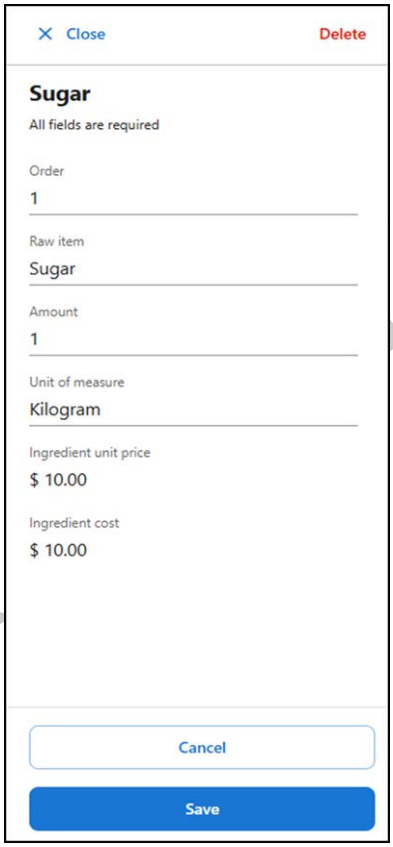
9. Update the **ingredient details** as needed.

> **Note**
> You can only change the order sequence and amount of ingredients used. You cannot update the raw items or unit of measure.
> If you want to delete an ingredient, click **Delete** to remove the ingredient from the recipe.



Updating the ingredients

10. Click **Save** to confirm the changes. The 'Ingredient was successfully updated' message appears.

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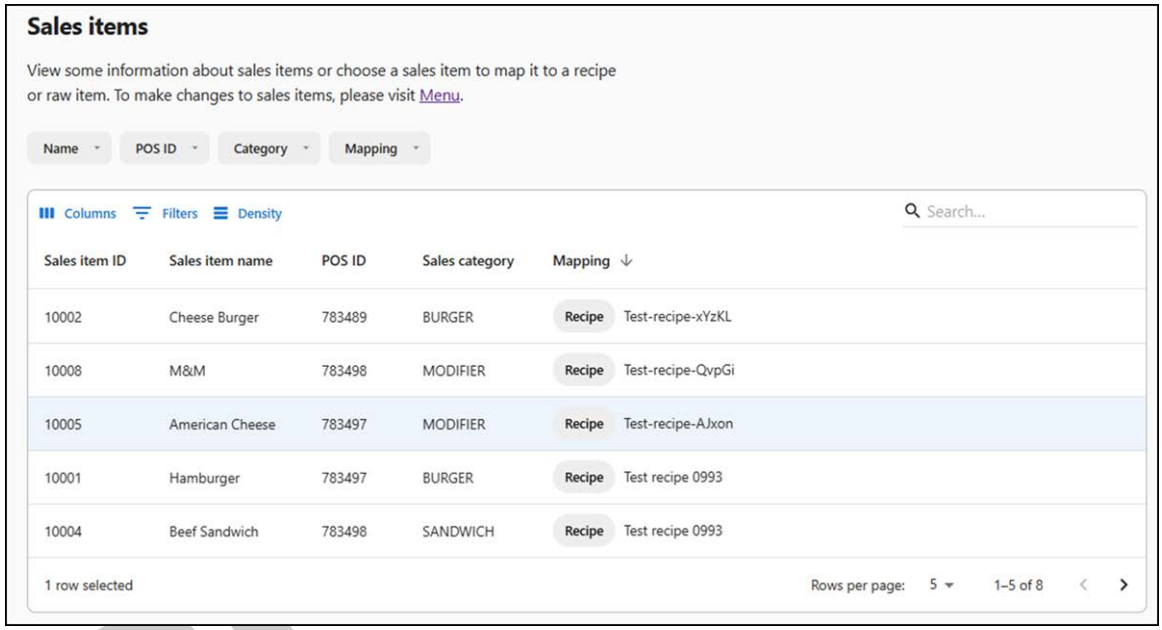
Viewing and mapping sales items (Inventory Core only)

Sales items are the individual items, such as American Cheese, Hamburger, and more, that you can map to a recipe or a raw item in the ASM application. Sales items are populated into ASM from the POS.

To view the list of available sales items:

1. Select **Inventory** > **Menu** > **Sales items**. The **Sales items** screen appears.



View sales items

The following details appear on this screen:

Sales item ID — Unique identification number of the sales item.

Sales item name — Unique name of the sales item.

POS ID — Unique identification number of a sales item as defined in the POS.

Sales category — Type of sales item, such as modifier, sandwich, burger, and more.

Mapping — Indicates the recipe or raw item to which the sales item is currently mapped.

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To map a sales item to a recipe or raw item:

1. In the **Sales items** screen, select a **sales item** that you want to map to a recipe or raw item. A sliding panel appears on the right.
2. Click **Edit**.

> **Note**
> You must have administrator privileges to map the sales item.

3. Select the **Recipe or raw item** option. A pop-up menu to select a recipe or raw item appears. The sales items are grouped under the **All**, **Recipe** and **Raw items** tabs, which allows you to pick the recipe or raw item easily. Alternatively, use the **Search** option to locate the recipe or raw item. Additionally, under each item a label is visible for easy identification of current mapping.
4. Select an **item** to display the following screen.

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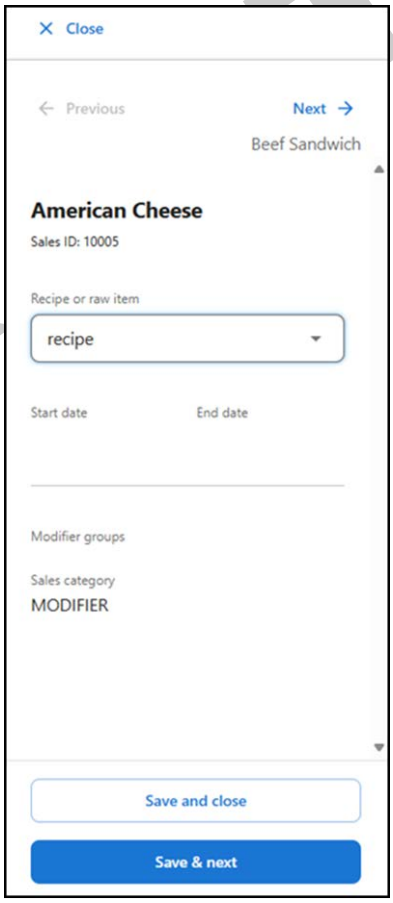

Mapping a recipe or raw item

Start date and End date — The period for which the mapping is applicable appears.

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Modifier groups — The modifier groups to which the item belongs is indicated. For example, Cheese.

Sales category — Type of sales item. For example, Modifier.

5. Perform **one** of the following:
   - Click **Save and close** to confirm the changes and close the sliding panel.
   - Click **Save & next** to confirm the changes and move to the next item without closing the sliding panel.

Viewing modifier groups (Inventory Core only)

A modifier group is a collection of modifier items grouped based on the type of item. The modifier item defines a sales item, such as lettuce, white bread, and more, and they are grouped within a modifier group. For example, 'Cheese' is a modifier group, 'American Cheese' a type of cheese, and is also the sales item.

Some sales items have modifier groups attached based on the POS configuration. When you select a modifier group, all the grouped sales items in the modifier group (as defined in the POS) appear below the item.

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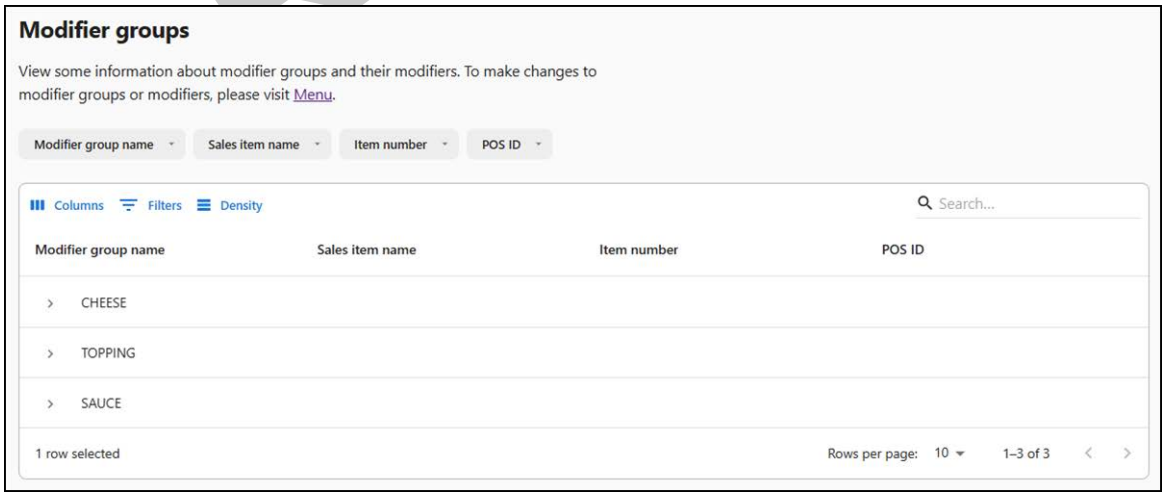
To view modifier groups:

1. Select **Inventory** > **Menu** > **Modifier groups**. The **Modifier groups** screen appears with the list of available modifier groups as defined in the POS.



'Modifier groups' screen

2. Select the **modifier group name** to expand and list the items under the group.

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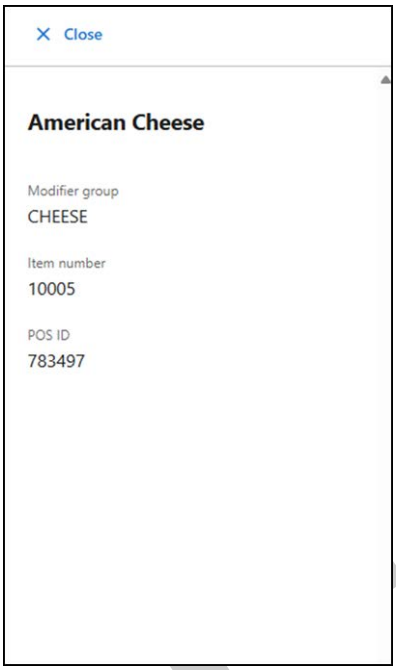
3. Select the **sales item**. A sliding panel appears:



Viewing modifier items

Modifier group — Name of the modifier group. For example, Cheese.

Item number — Unique identification number of the sales item.

POS ID — Unique identification number of the sales item as defined in the POS.

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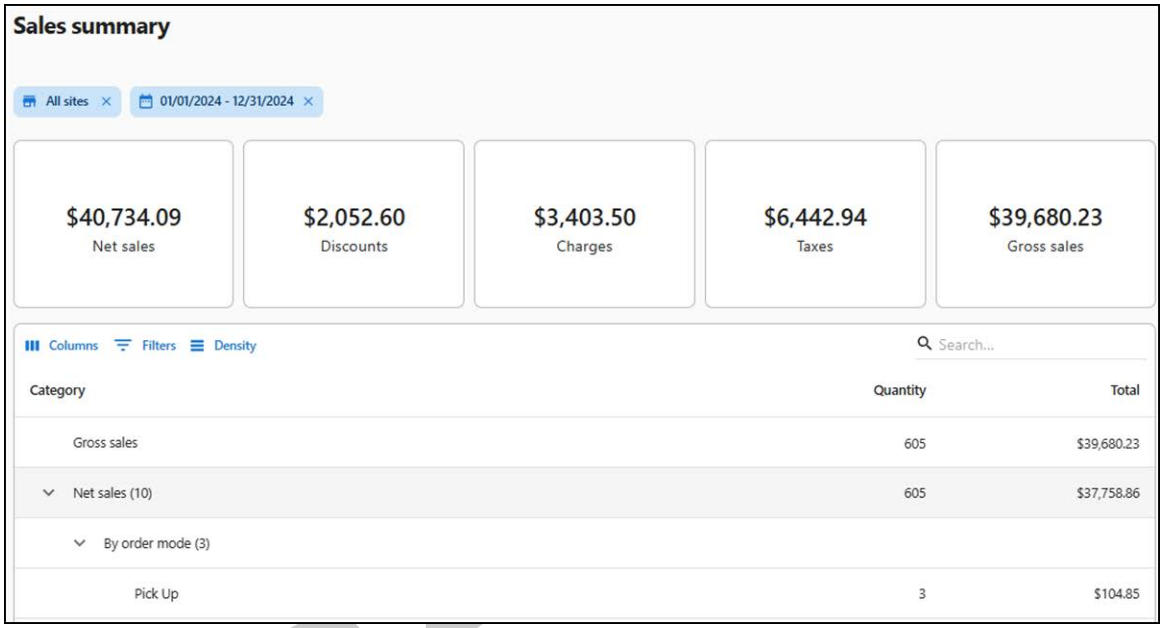
About sales reporting

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

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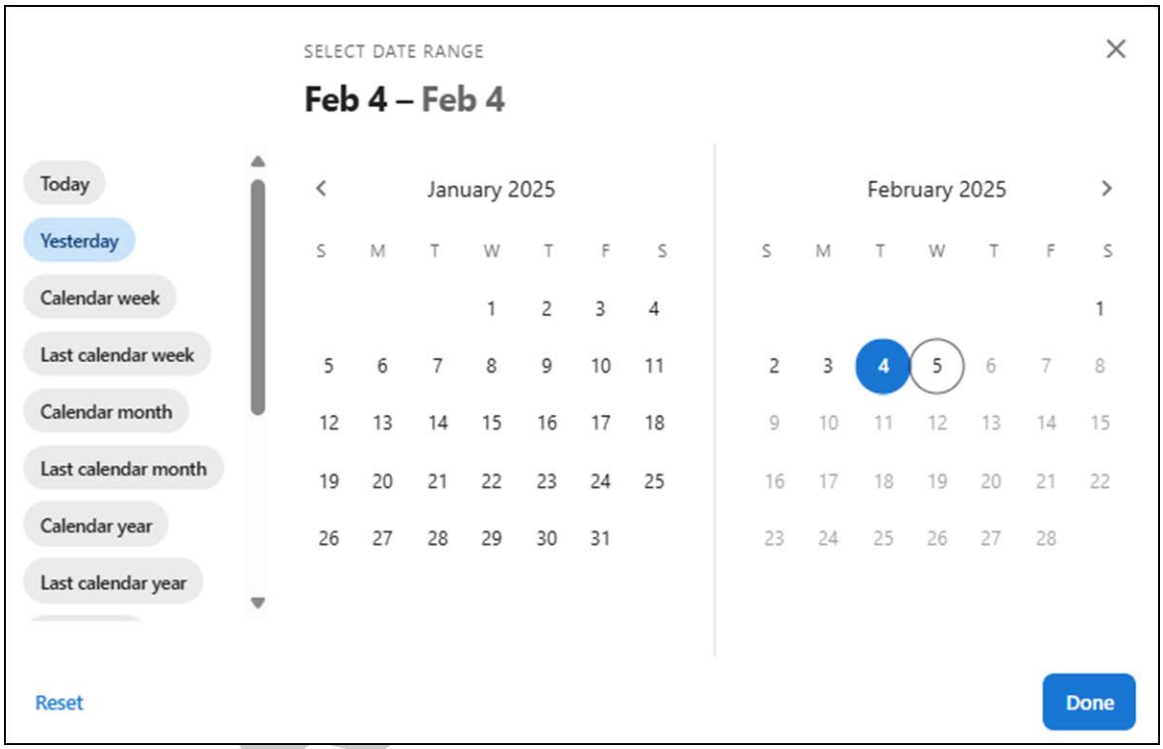
Calendar

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

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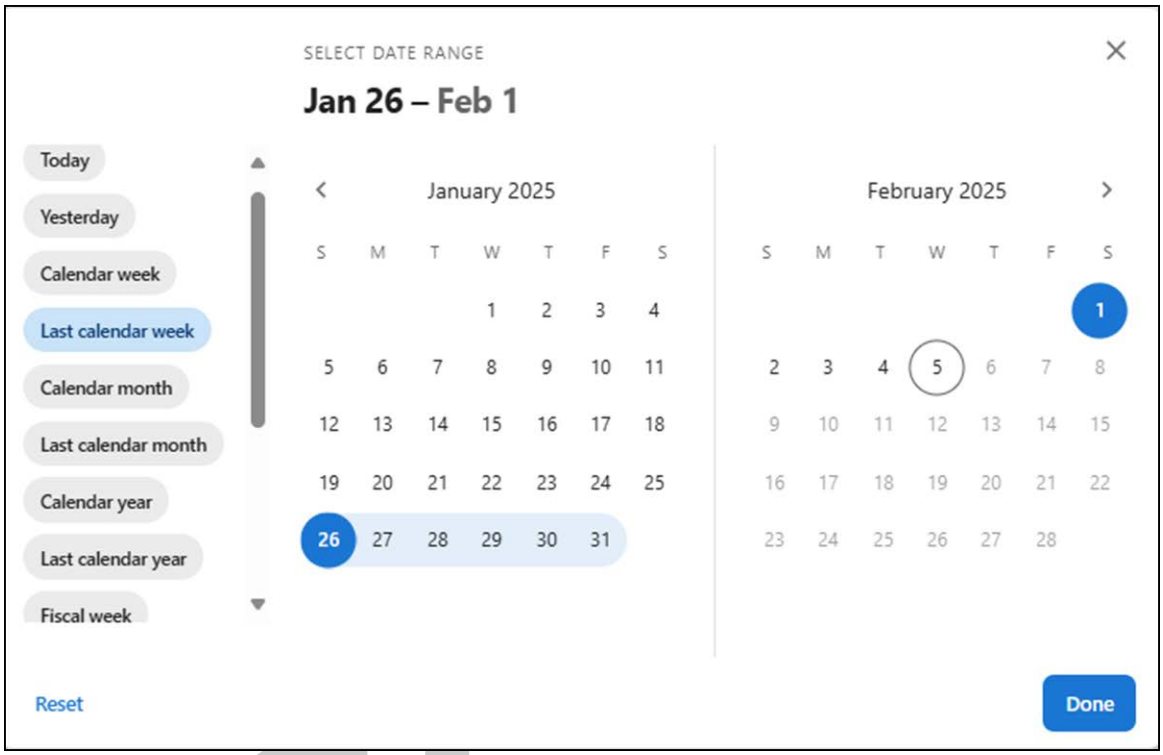
Date range selections

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



Date range selection

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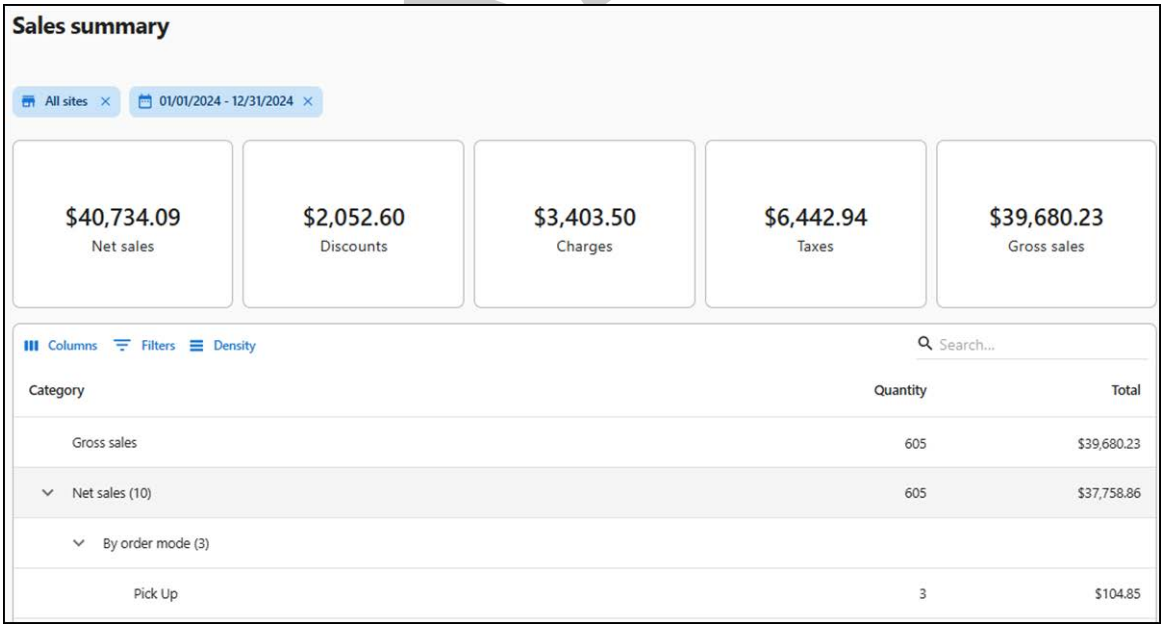
Working with Sales reports

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

- Sales summary
- Profit & loss
- Product mix
- Payments
- Revenue centers
- Taxes
- Discounts
- Refunds
- Voids

Sales summary

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



'Sales summary' report

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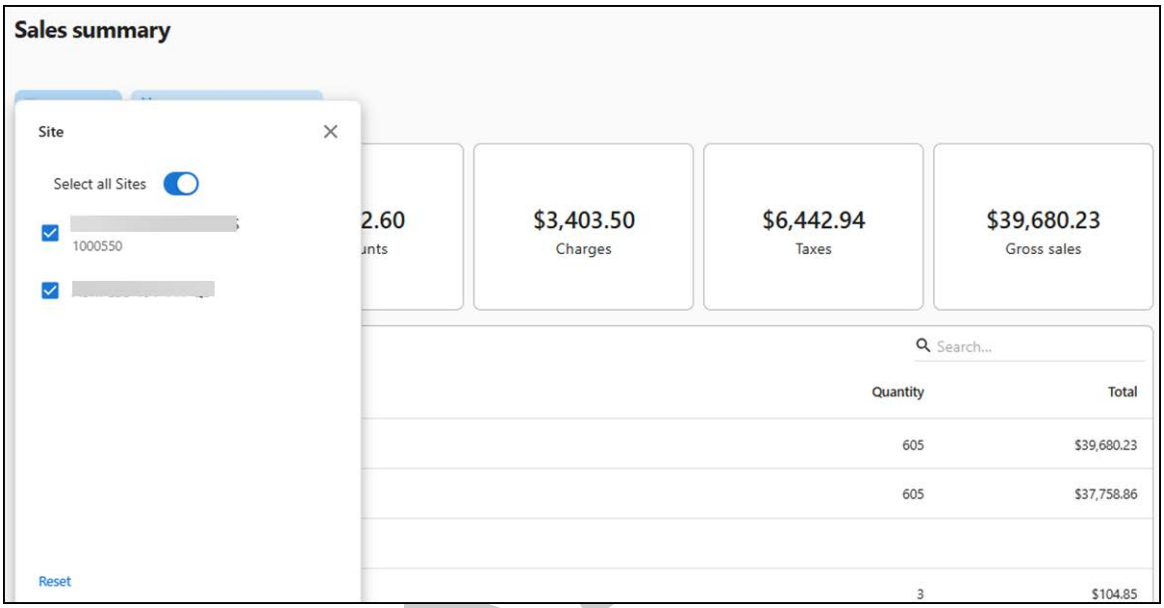
To run the 'Sales summary' report:

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.

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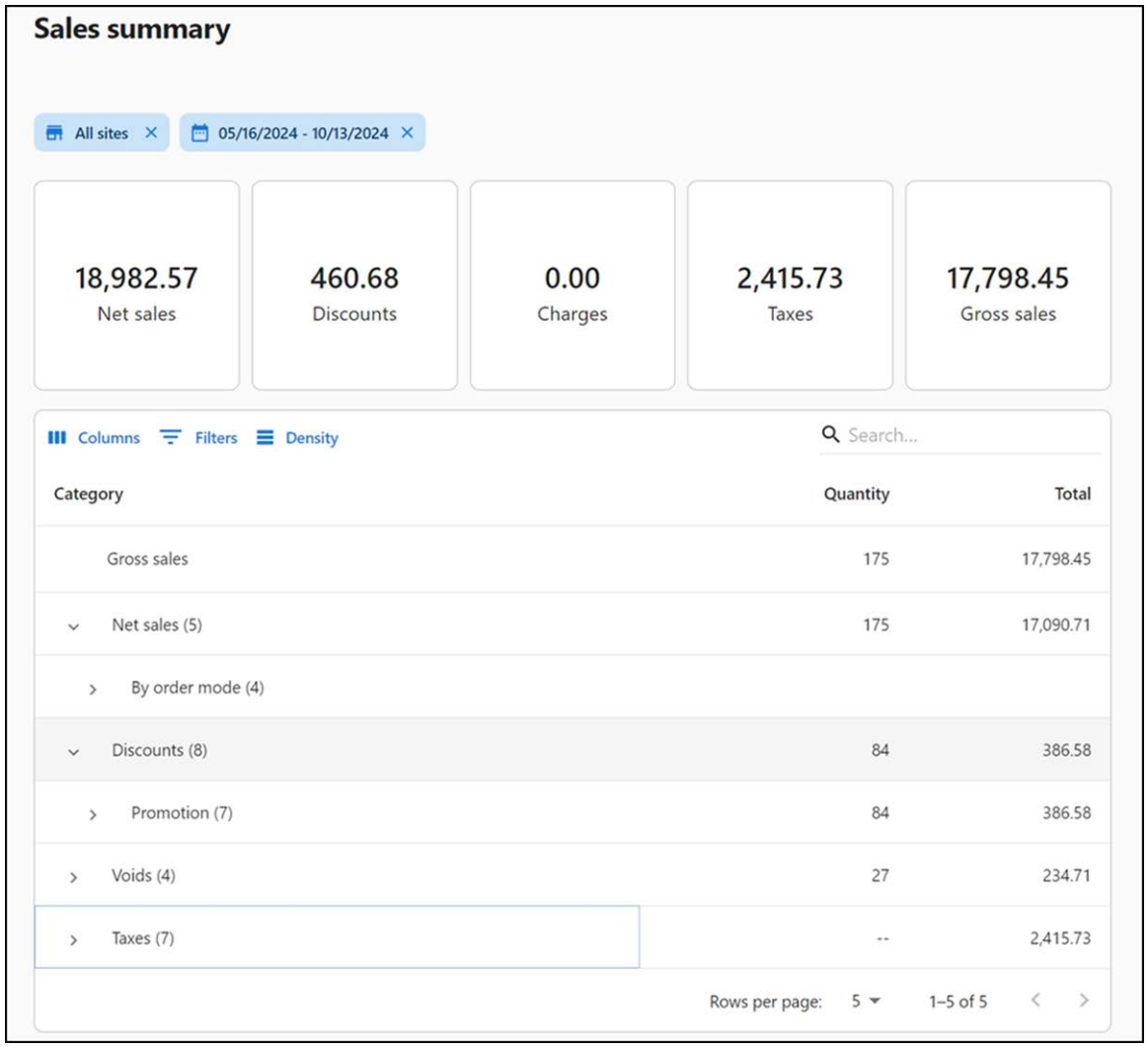
The report dynamically updates with each selected parameter and the report tiles are populated with key metric data.



'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.

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

The following information appears in the report:

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

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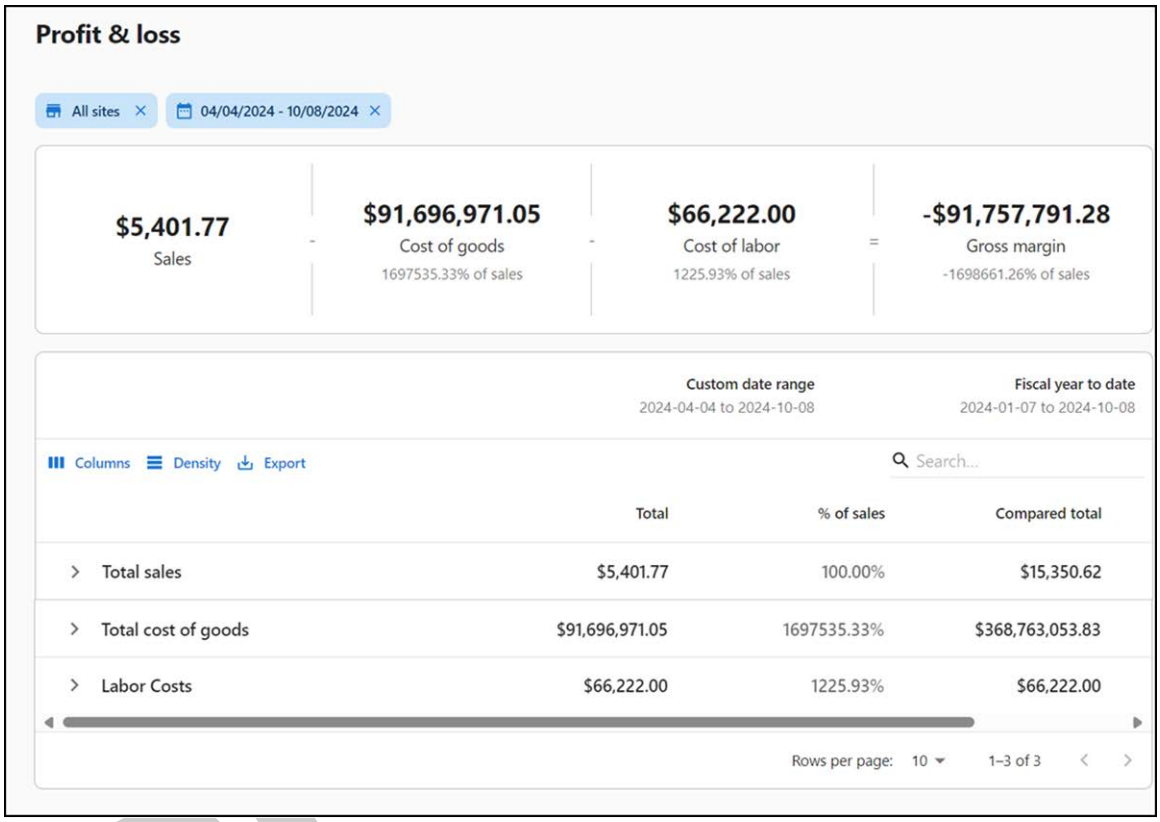
Profit & loss

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



'Profit & loss' report tiles

To run a 'Profit & loss' report:

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

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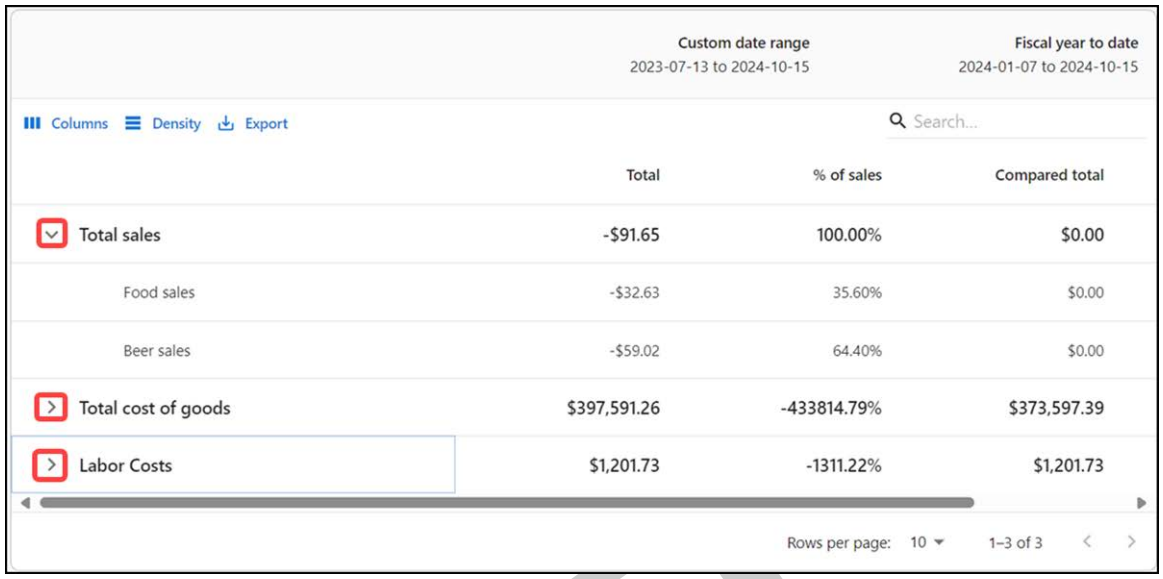
4. Select a **date range.**



'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.

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Row	Description
Compared total	Displays the total compared to the fiscal year. See "Configuring the fiscal calendar" on page 187.
Compared % of sales	Displays the percentage of sales compared to the fiscal year.

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Product mix

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

'Product mix' report - 'Menu items' view

The 'Product mix' report offers two views:

- Menu items
- Employee sales

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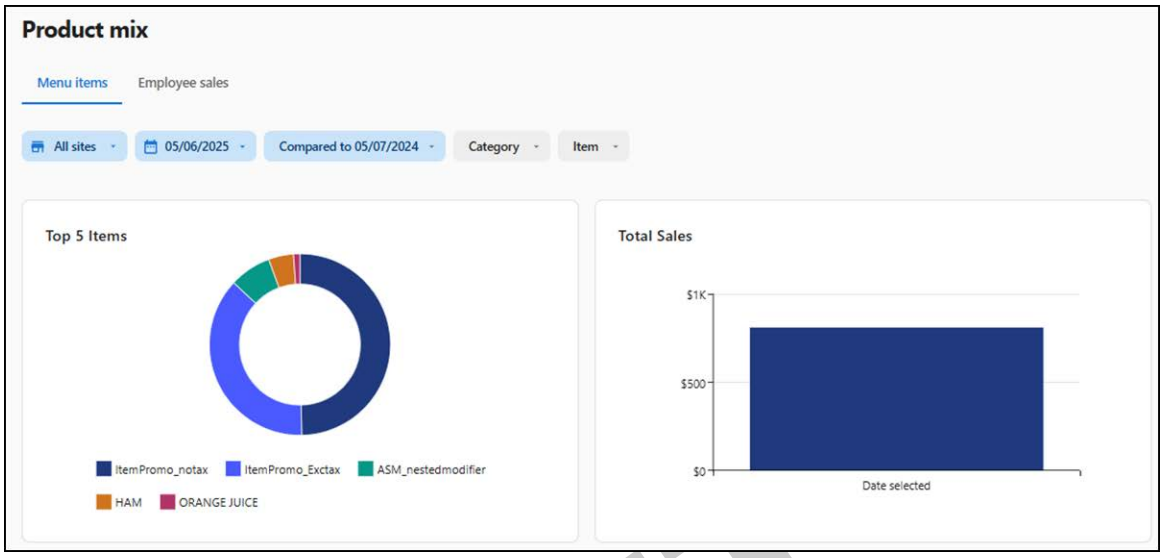
‘Menu items’ view



‘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.

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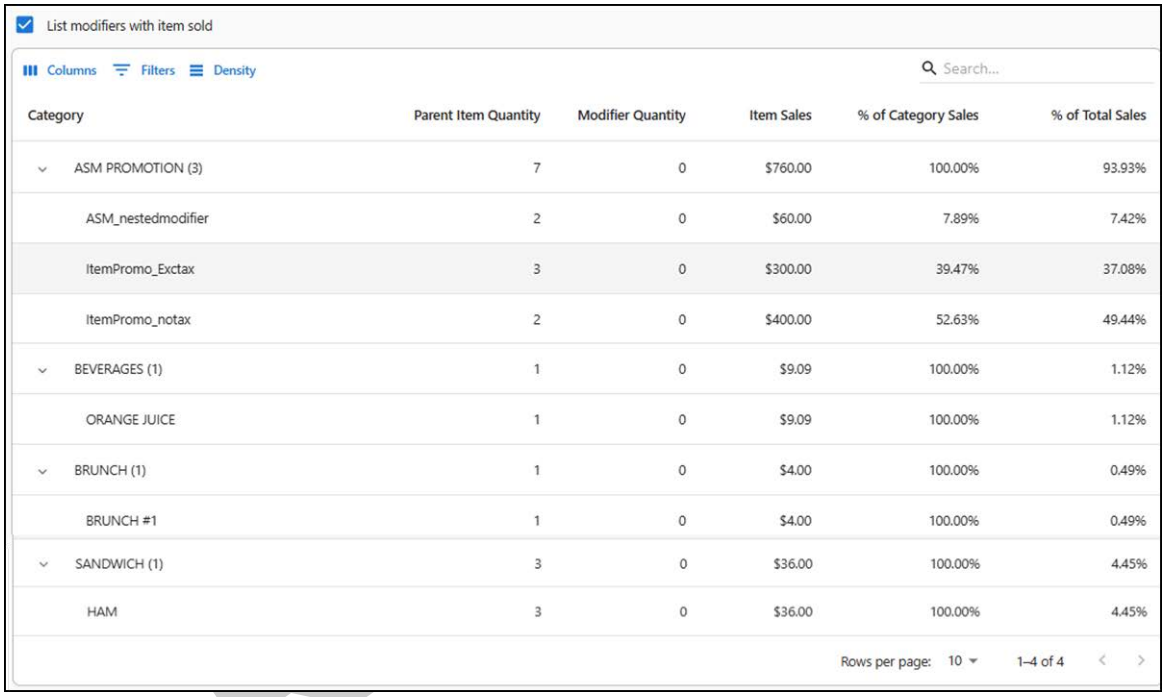
Total Sales — Displays data as a line graph on the axes showing the sales along with days/months/years, based on the date range selection. Hover over the line graph to show the net sales and item count of the selected range along with the comparison range.

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



'Product mix' report - 'Total sales' view

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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.

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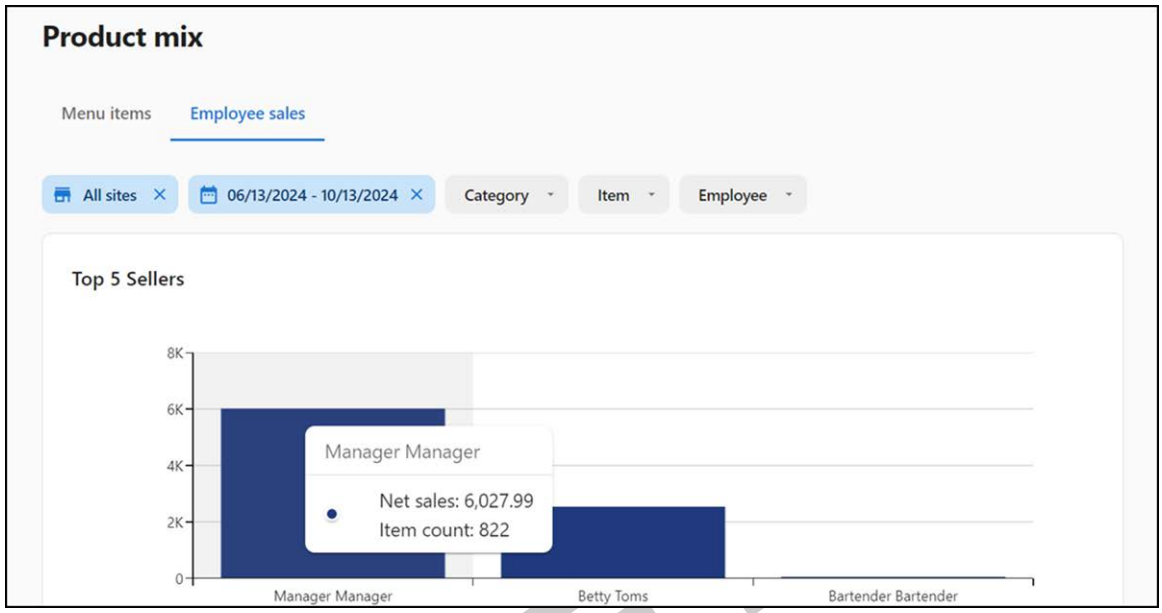
4. Select a **date range** to report from the drop-down list.



'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.

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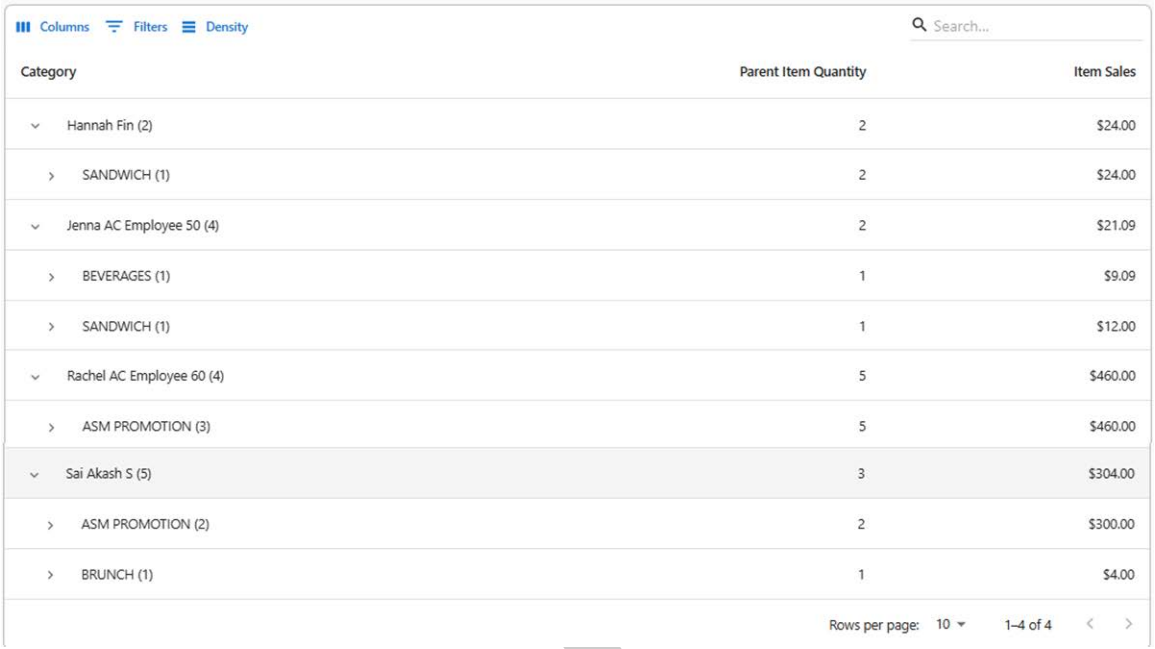
The following information appears in the report



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.

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To refine your search:

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

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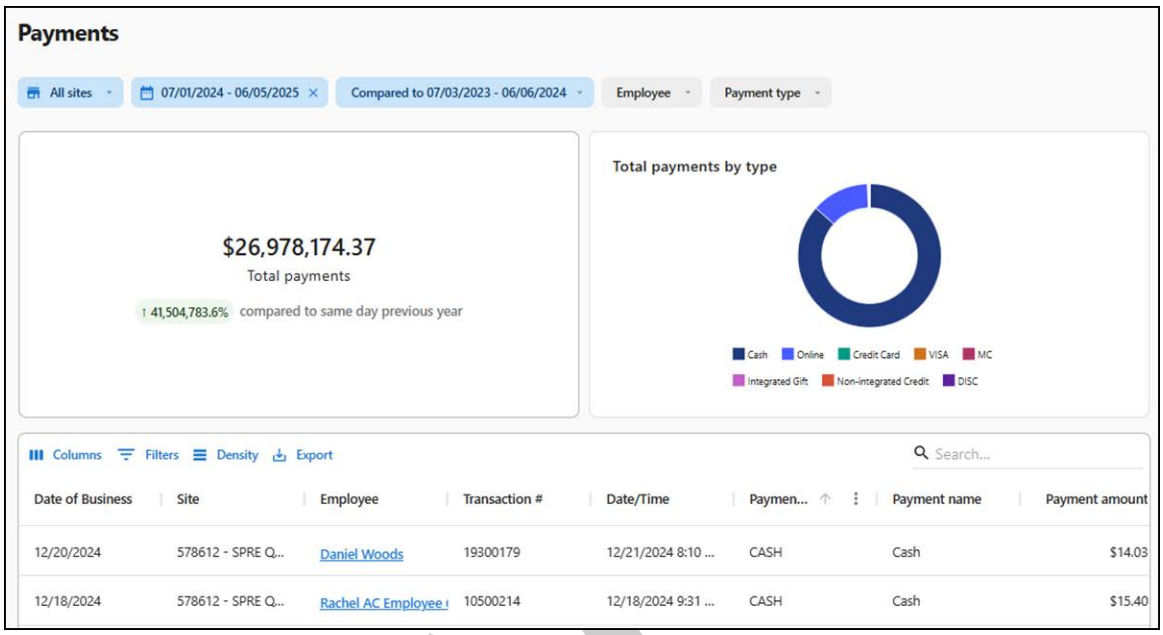
Payments

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



'Payments' report

To run the 'Payments' report:

1. Select **Sales** > **Report** > **Payments.** The 'Payments' report for the previous date appears by default.
2. Select 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.

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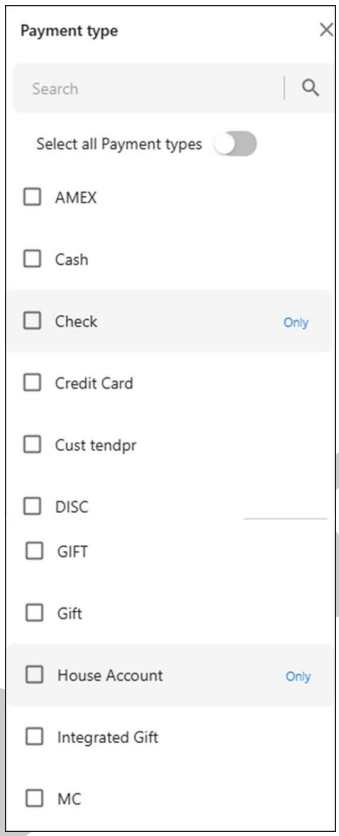
5. Select the **Employee** from the drop-down list.



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.

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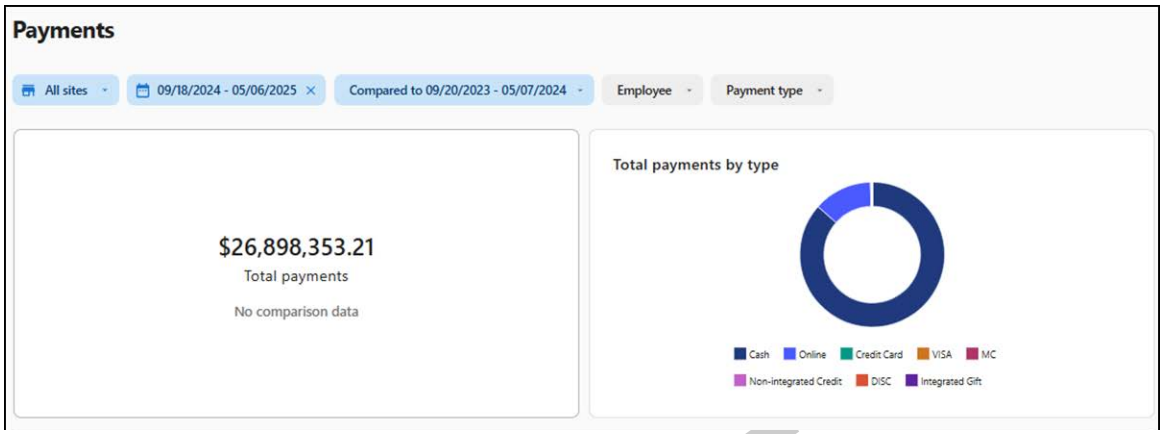
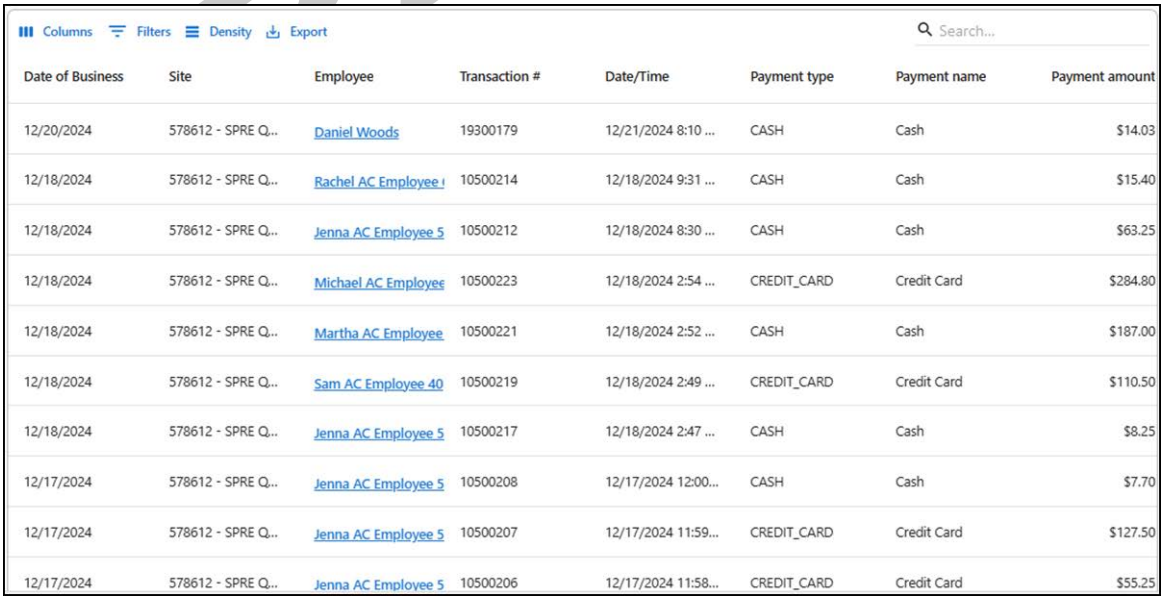
The report dynamically updates with each selected parameter. Reporting data appears on the following tiles.



'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.



'Payments' summary

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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.

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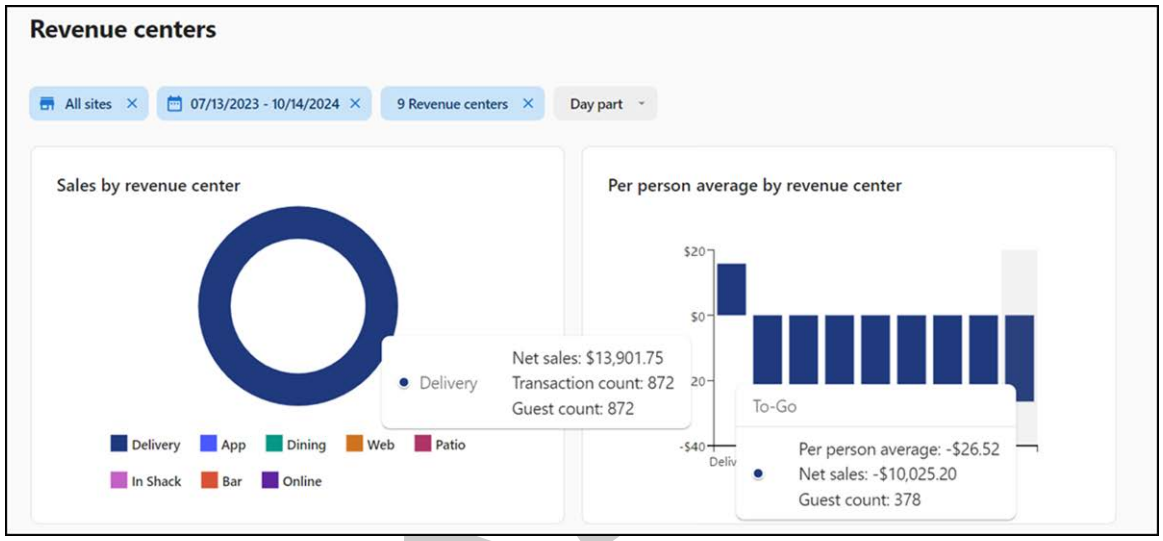
Revenue centers

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.

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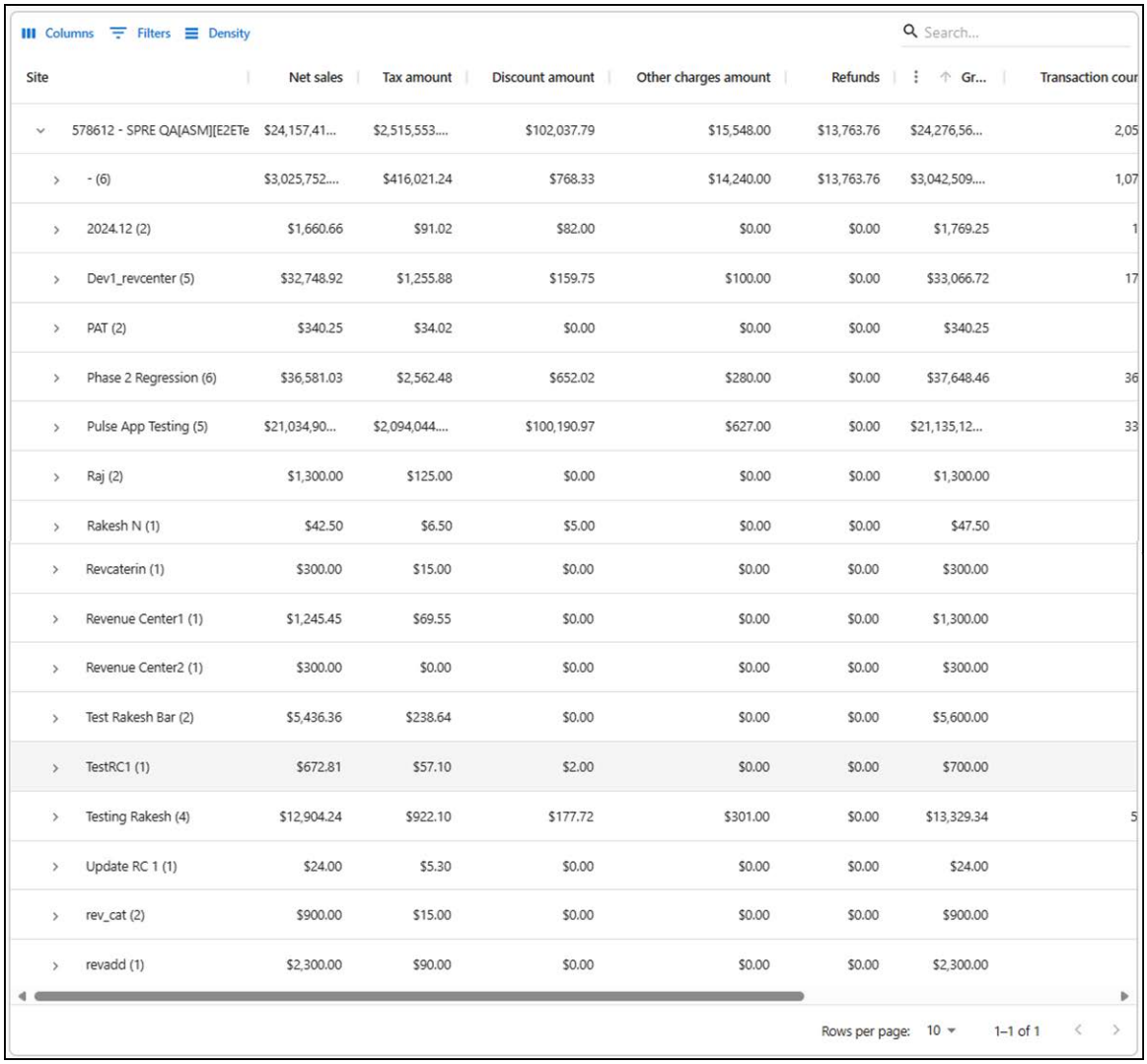
Per person average by revenue center — Displays the per person average (PPA) by revenue center. This is based on the following calculation: total sales / number of customers.

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.



'Revenue centers' report view

The following information appears in the report:

Column	Description
Site	Name of the site or store.

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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.

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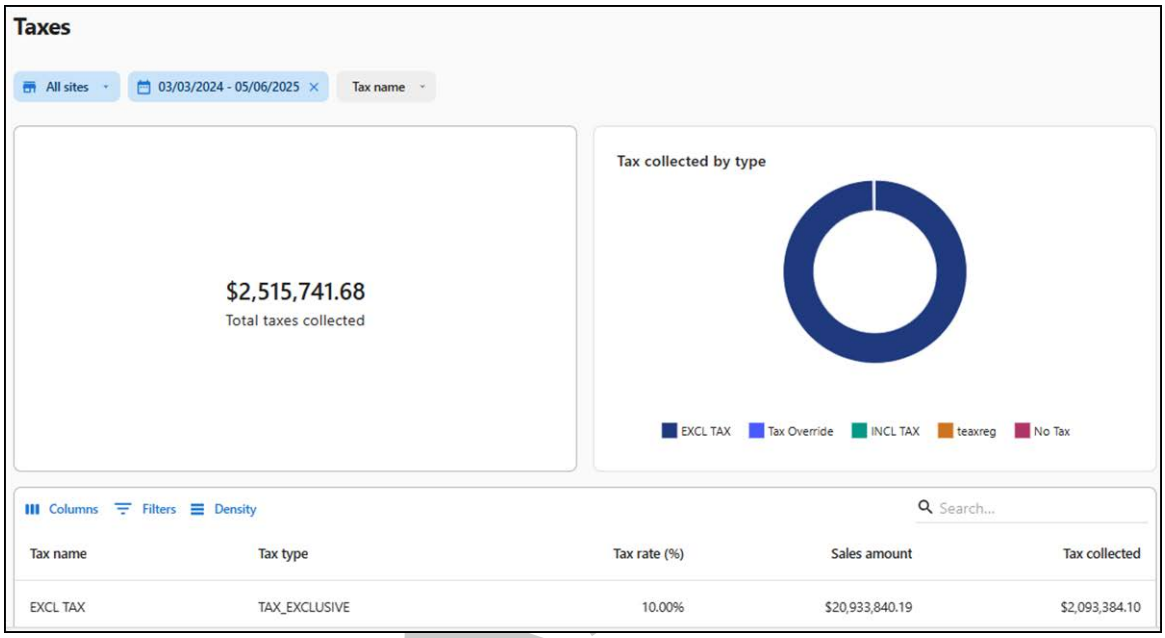
Taxes

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



'Taxes' report

To run the 'Taxes' report:

1. Select **Sales > Report > Taxes**. The 'Taxes' report for the previous day appears by default.
2. Select a **site** from the **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.

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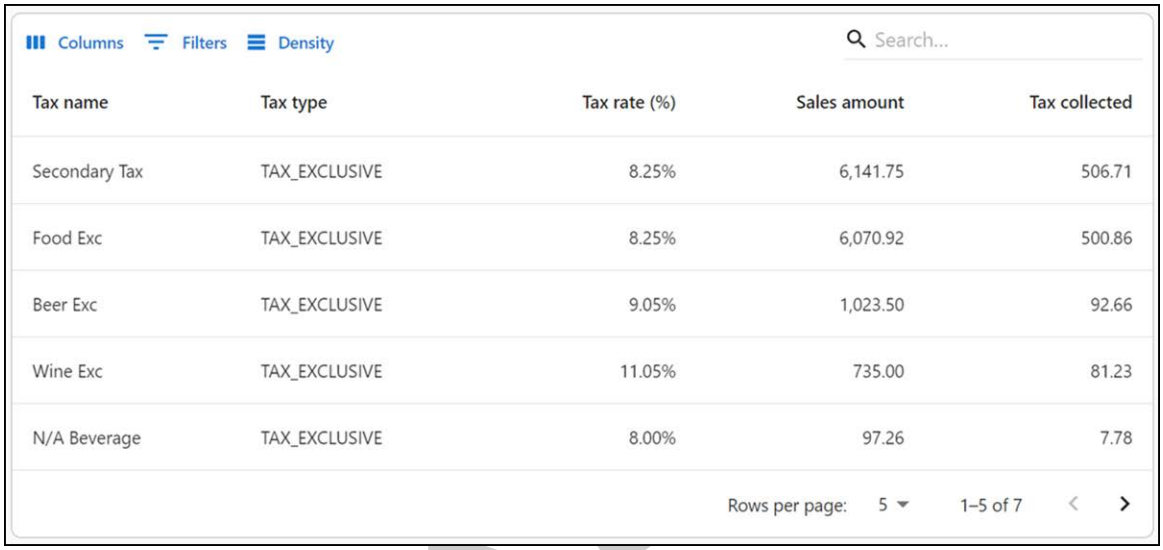
Total taxes collected — Displays the total amount of tax collected.

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.



'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.

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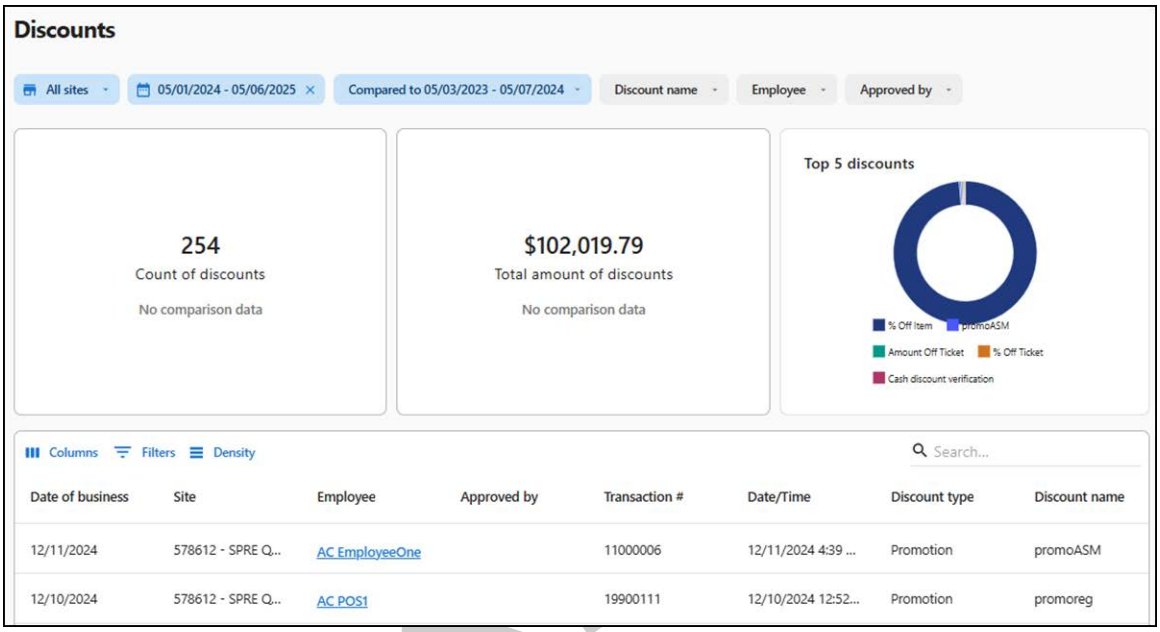
Discounts

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.

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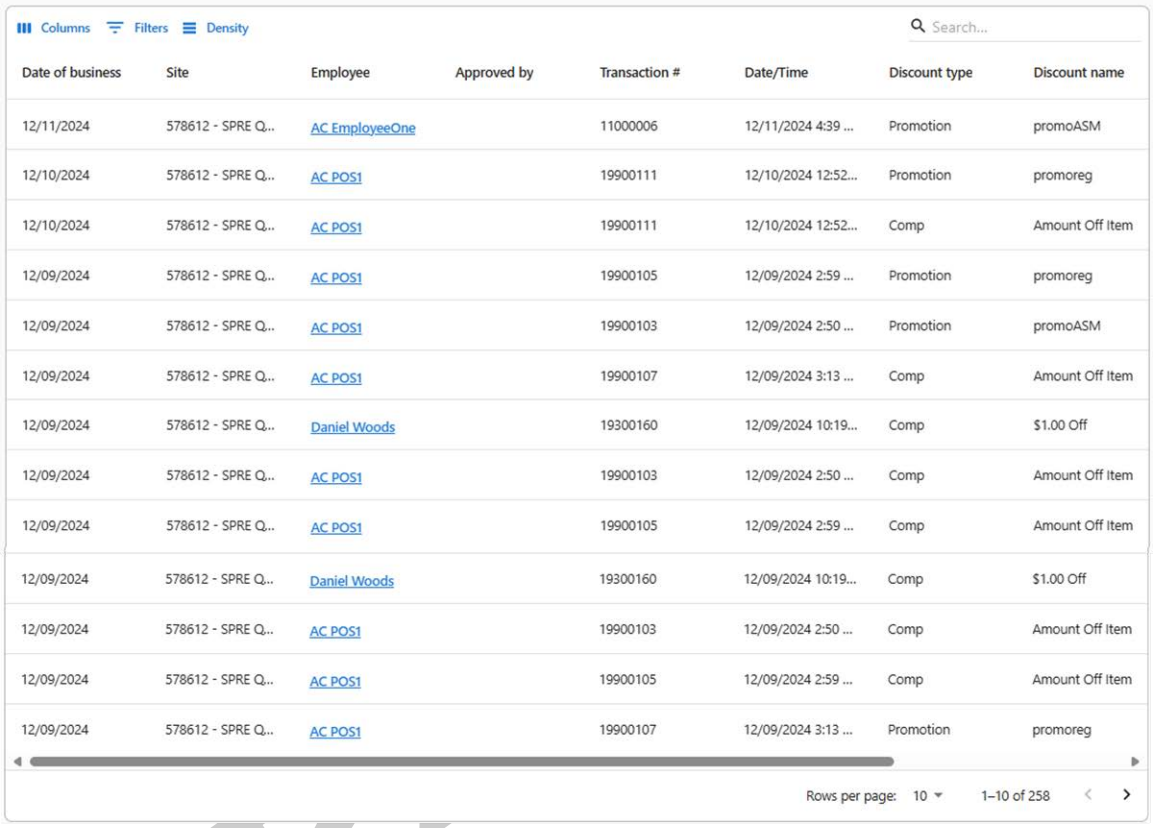
Top 5 discounts — Displays the top five types of discounts.



'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.

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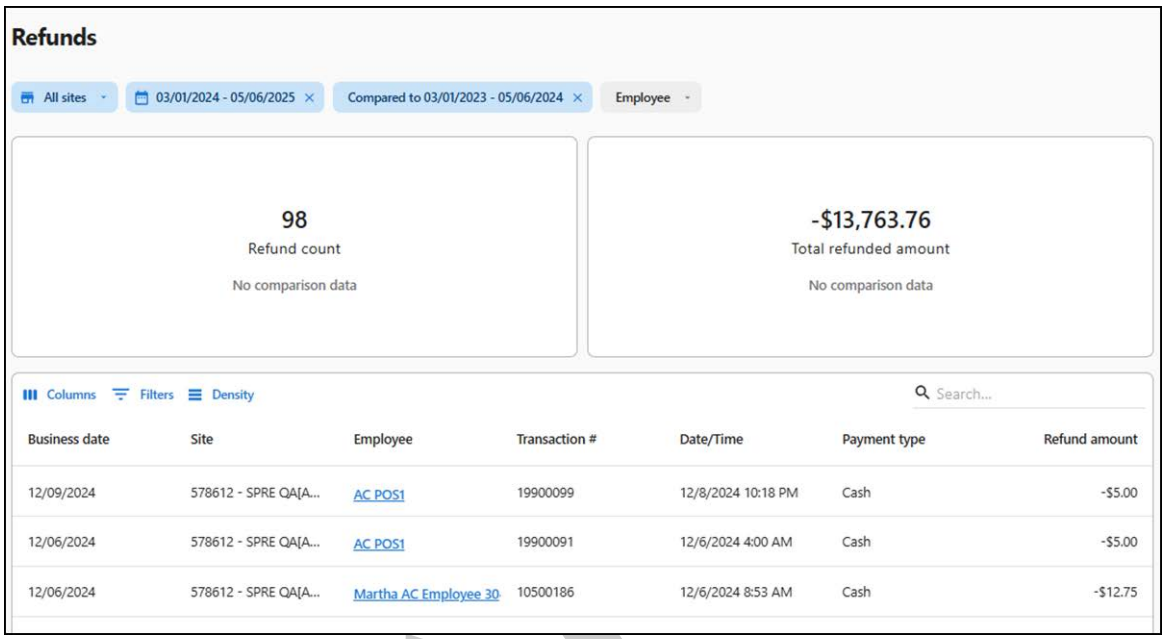
Refunds

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.

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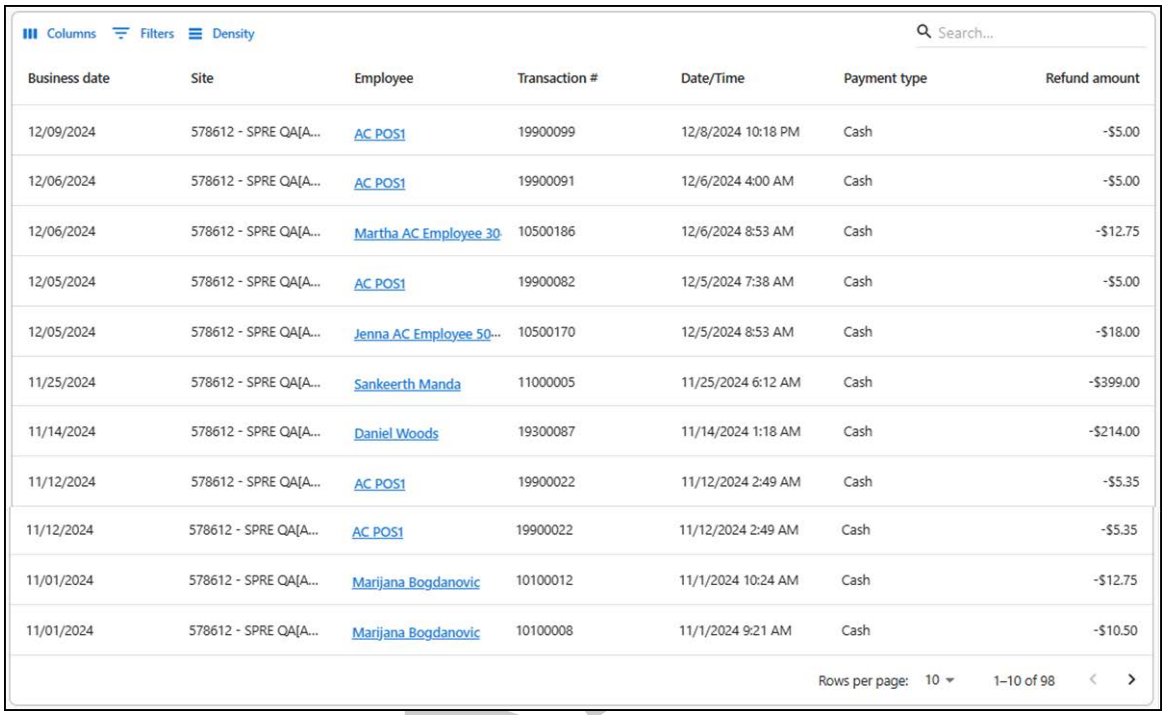
Total refunded amount — Displays the total amount of refunds issued to the customer.



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.

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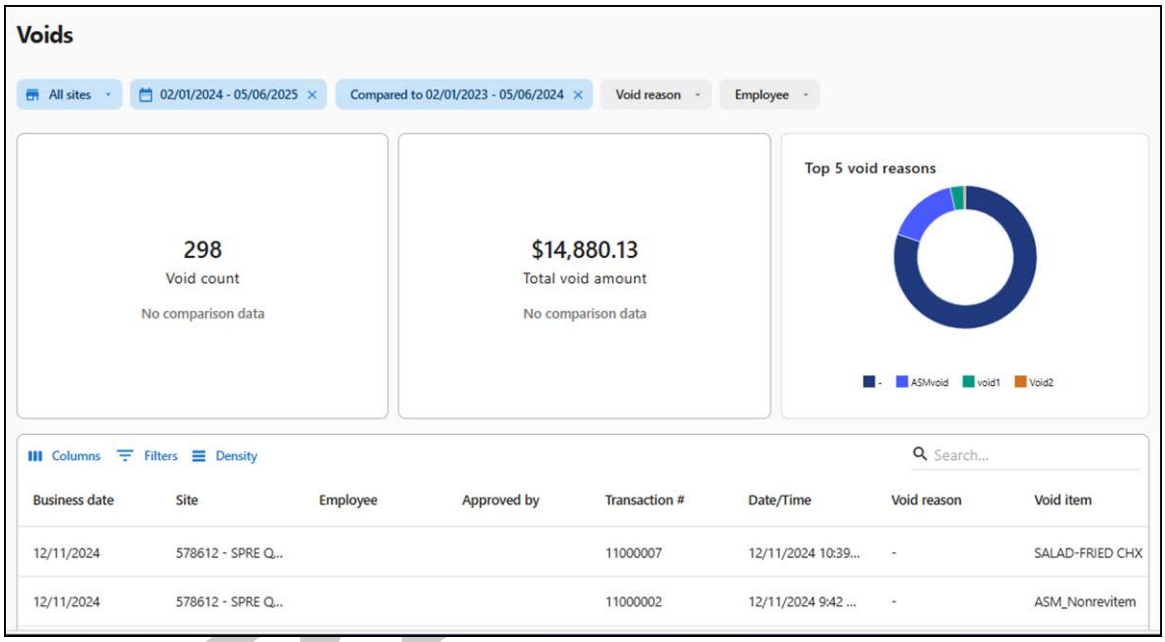
Voids

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.

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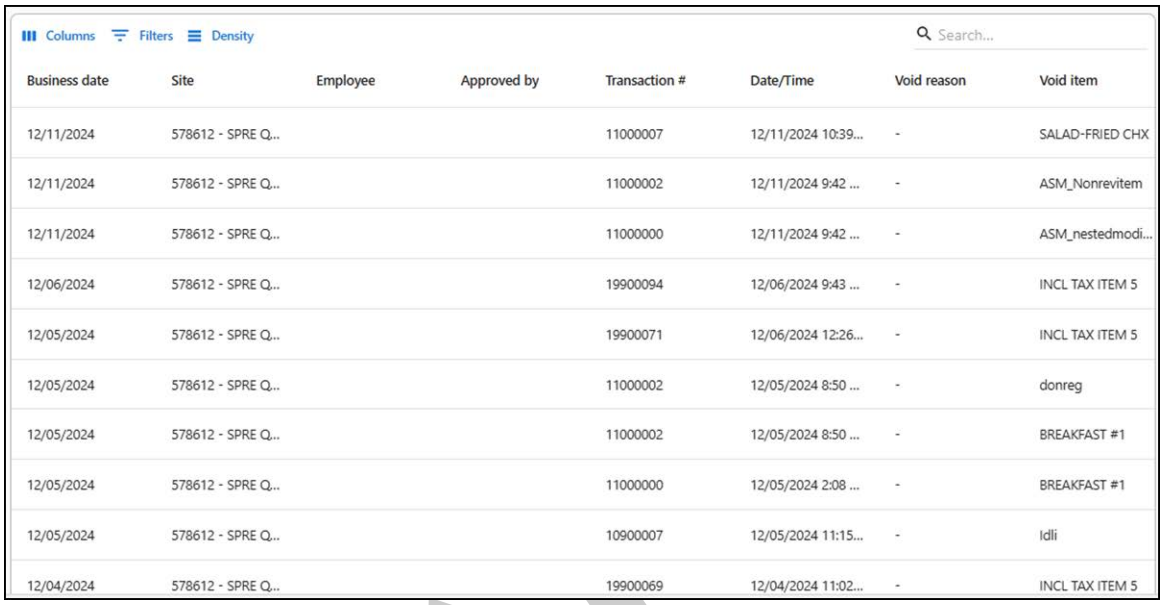
Top 5 void reasons: — Displays the top five reasons for performing the void. The data appears in a circle with different colors displaying each void with a color. Hover over the circle to view the percent of total voids, the void amount, and the void count of that item.



Business date	Site	Employee	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

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The following information appears in the report:

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

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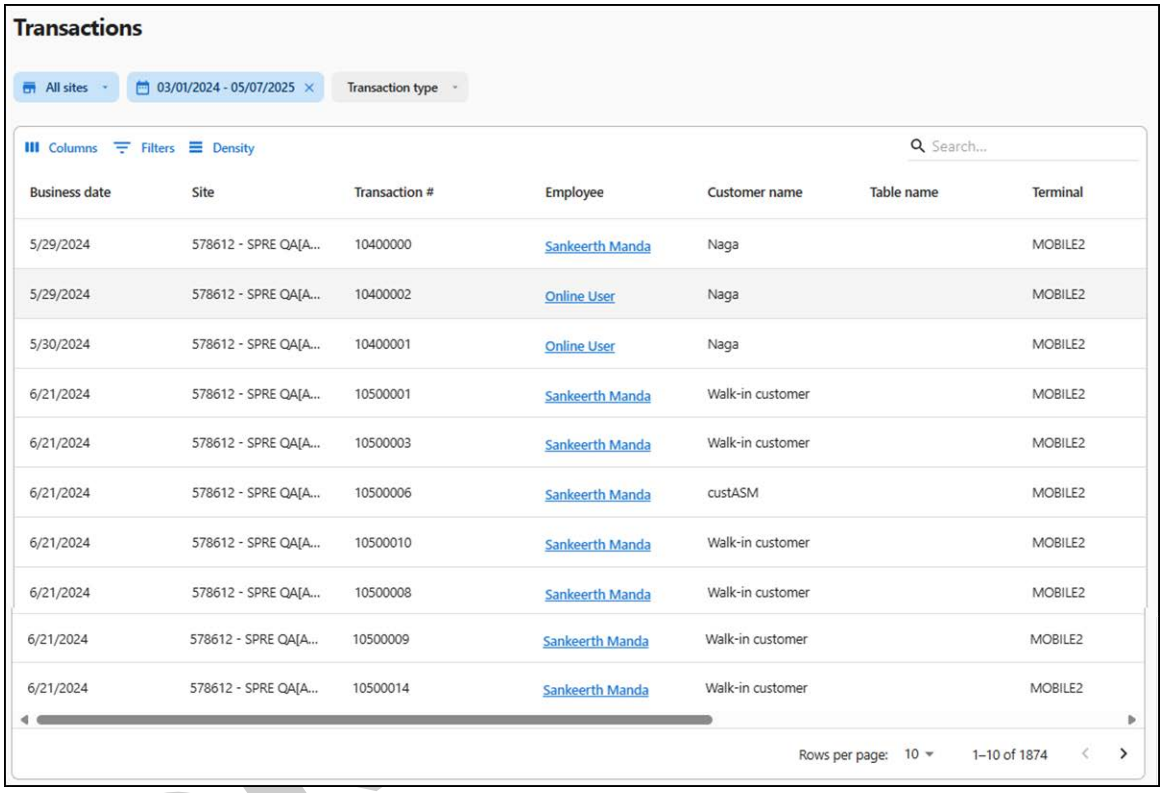
Viewing transactions

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



'Transactions' 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.

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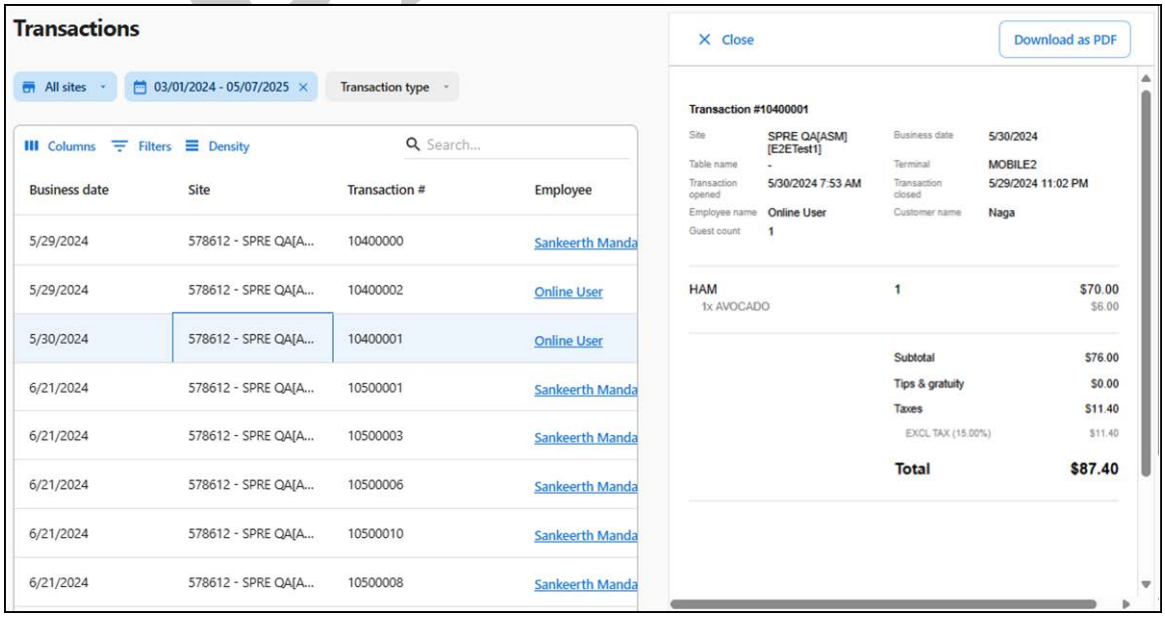
The following information appears in the report:

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**.



Transaction details

2. The slide out window appears with the transaction details (such as site name, transaction number,

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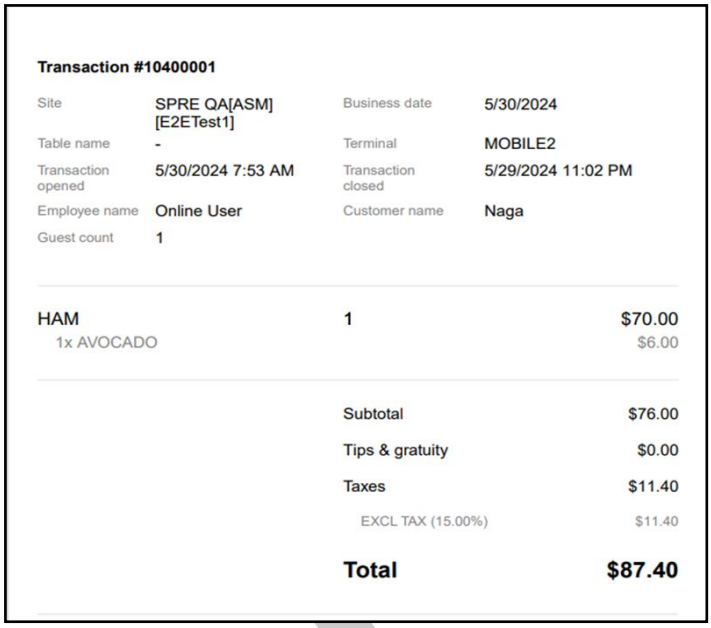
table number, transaction date, ticket items, item price, total transaction amount and more). Also, it allows you to print the transaction details in PDF.



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 1x AVOCADO	1	$70.00 $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.

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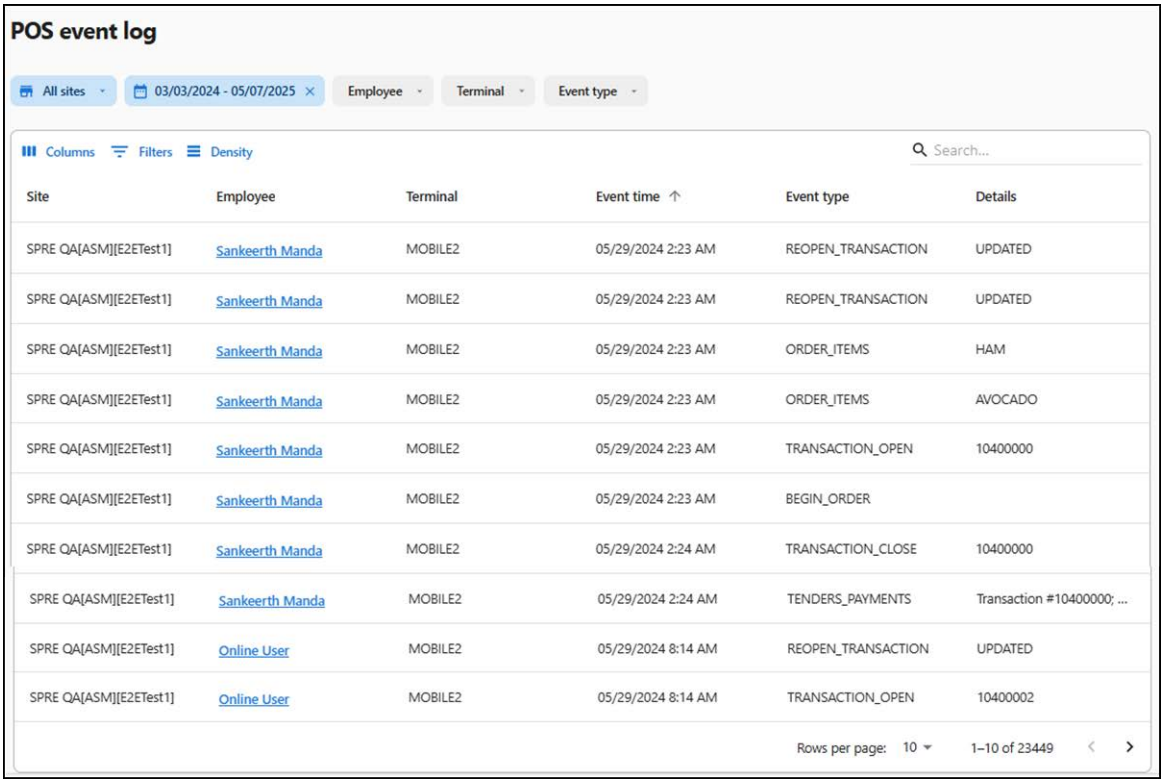
Viewing POS event log

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

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

To run the 'POS event log' report:

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



'POS event log' screen

2. Select a **site** 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.

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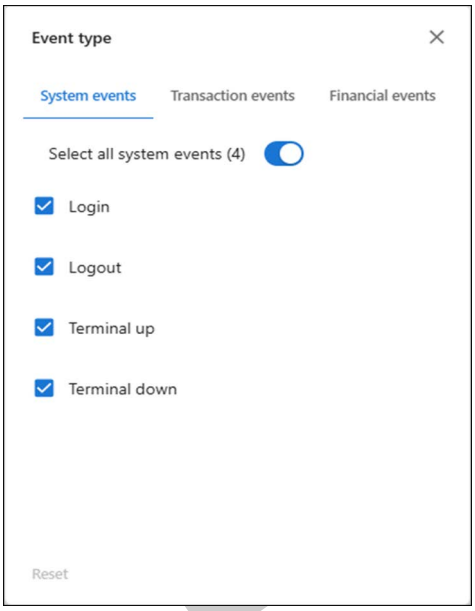
To refine your search you can select **multiple/all events** (specific to the event type selection) to view the transaction data.



'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.

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The following information appears in the report:

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

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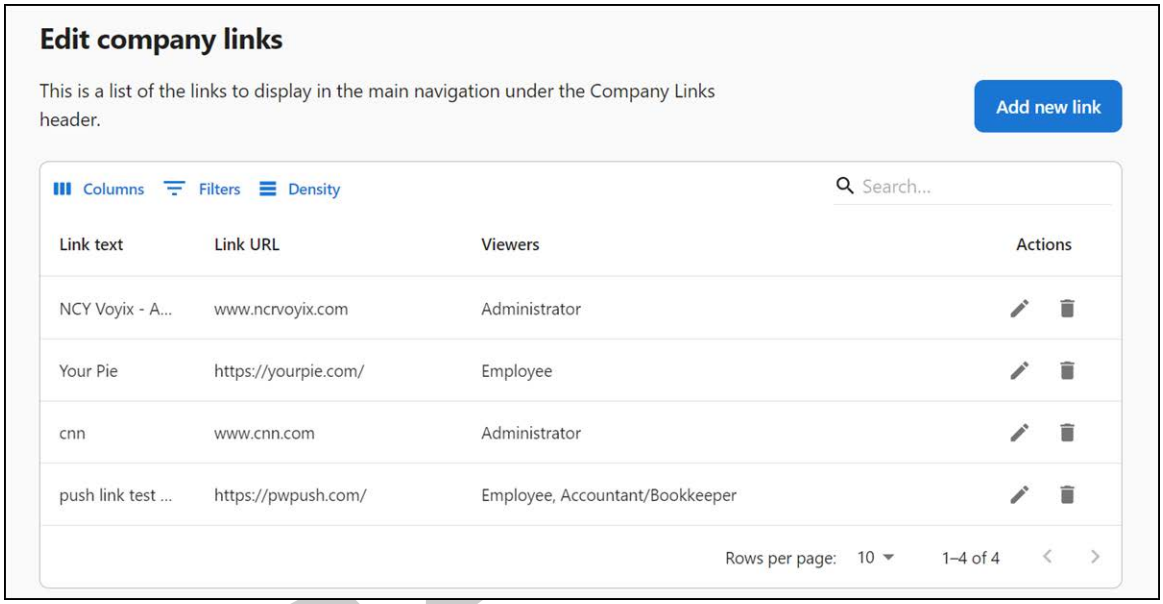
Managing company links

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



'Edit company links' screen

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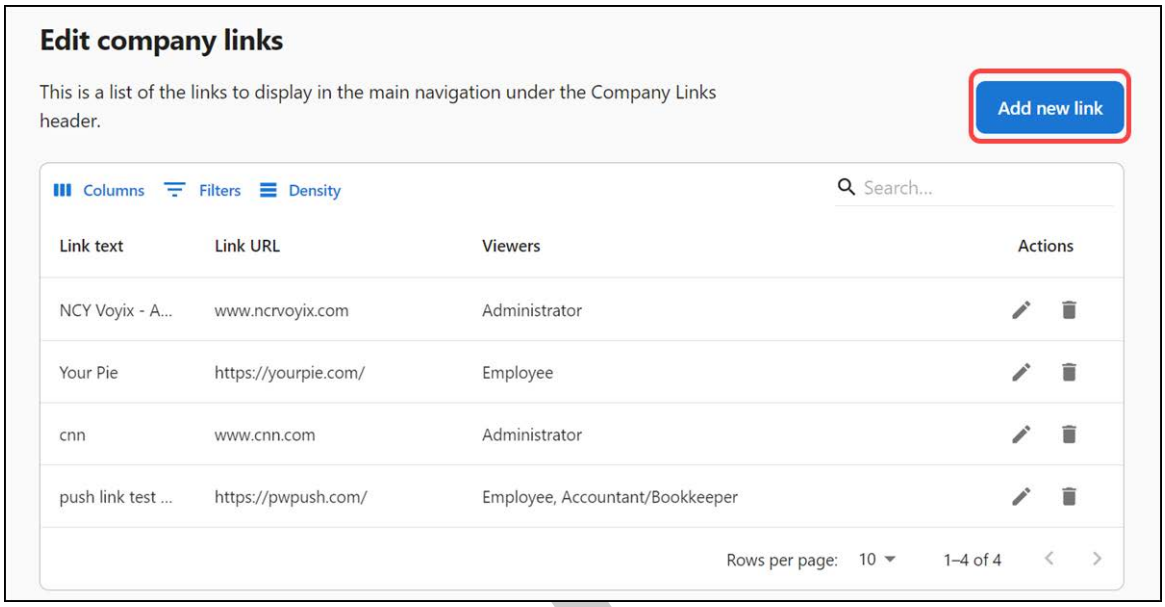
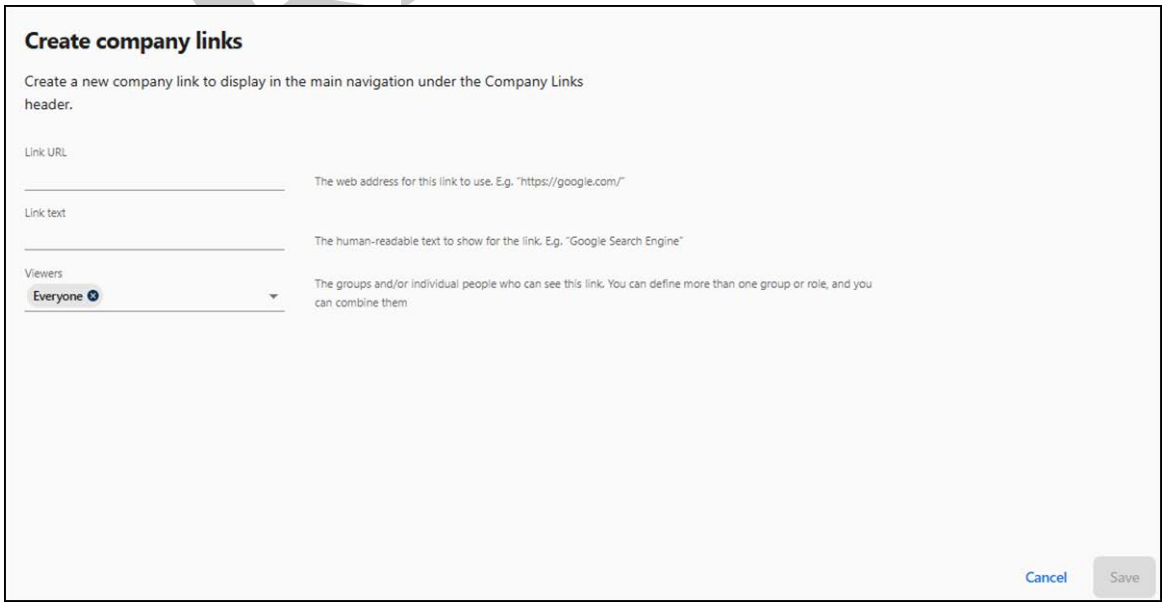
To create a company link:

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



'Edit company links' screen

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



'Create company links' screen

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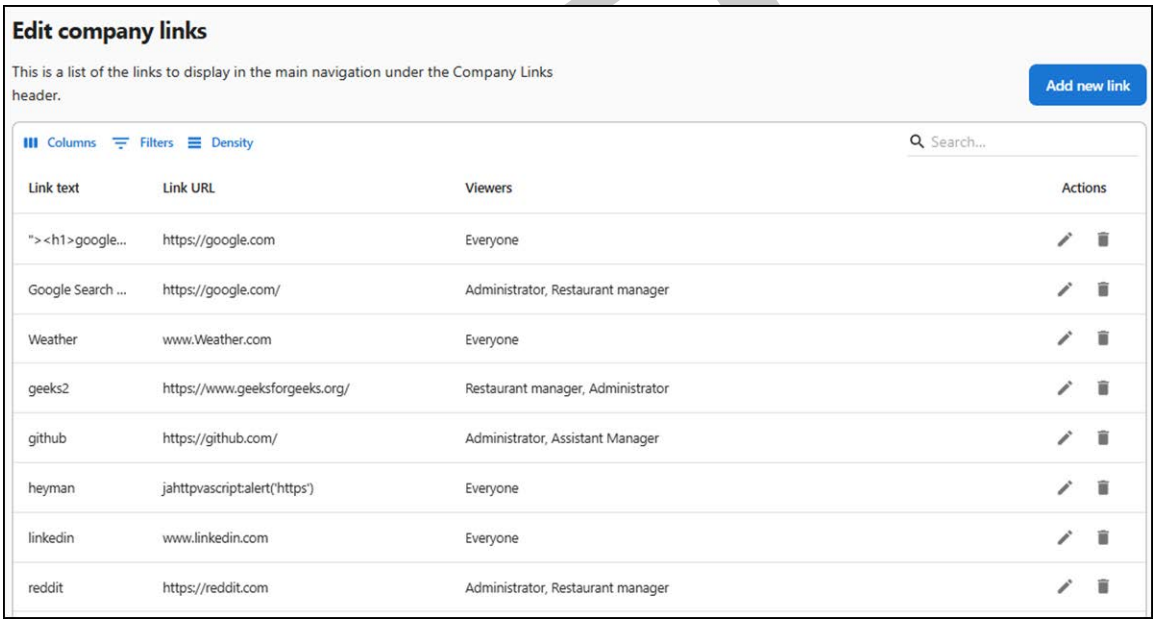
3. Enter the **Link URL** within the application for quick access. For example, if you want to provide quick access to the NCR Voyix documentation portal, type https://docs.ncrvoyix.com/.
4. Enter the **description** in 'Link text.' You need to provide a supporting description based on the URL entered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



List of company links

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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 **Edit company links** option.

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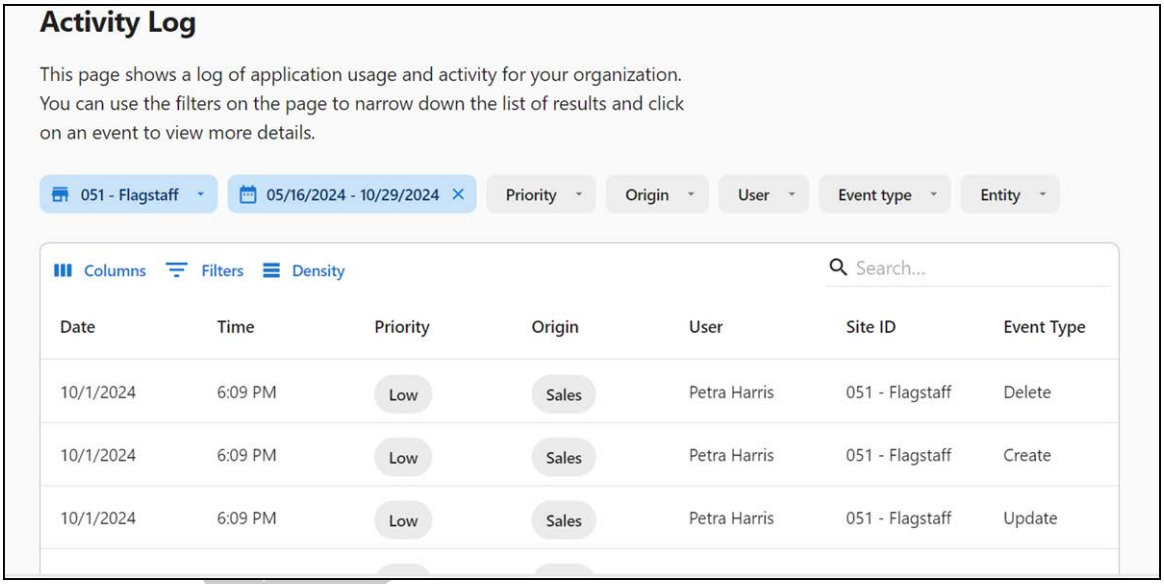
Viewing the Activity Log

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.

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

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

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

Priority — Severity of the corresponding activity.

Origin — Actual module that was impacted.

User — Name of the employee who performed the activity.

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

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

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

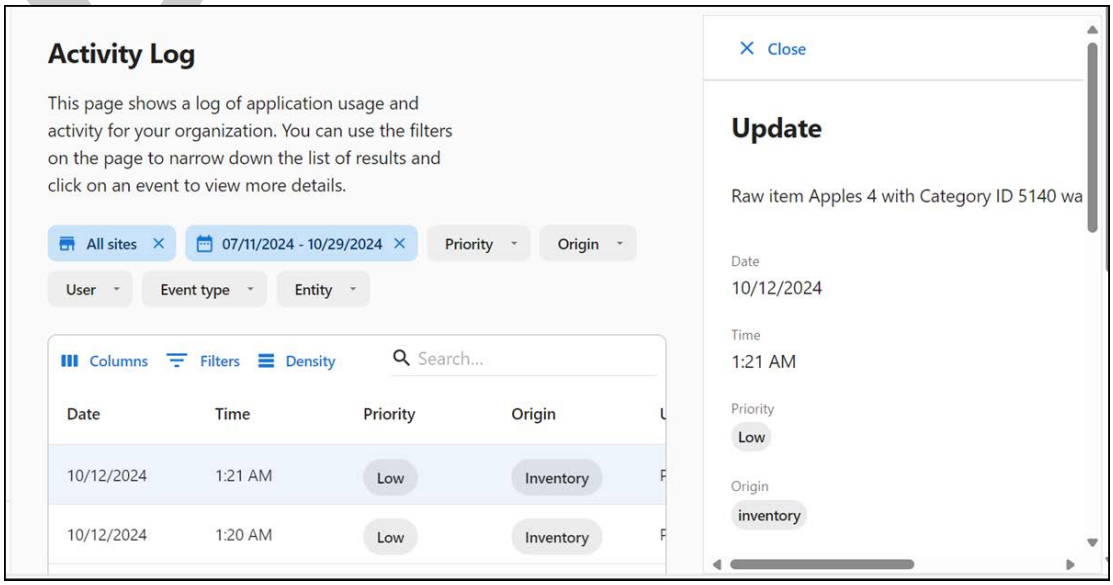
Message — Additional information about the activity.

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

Audit logging ID — Unique audit log ID.

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

Payload — Actual payload message.



Activity Log side panel

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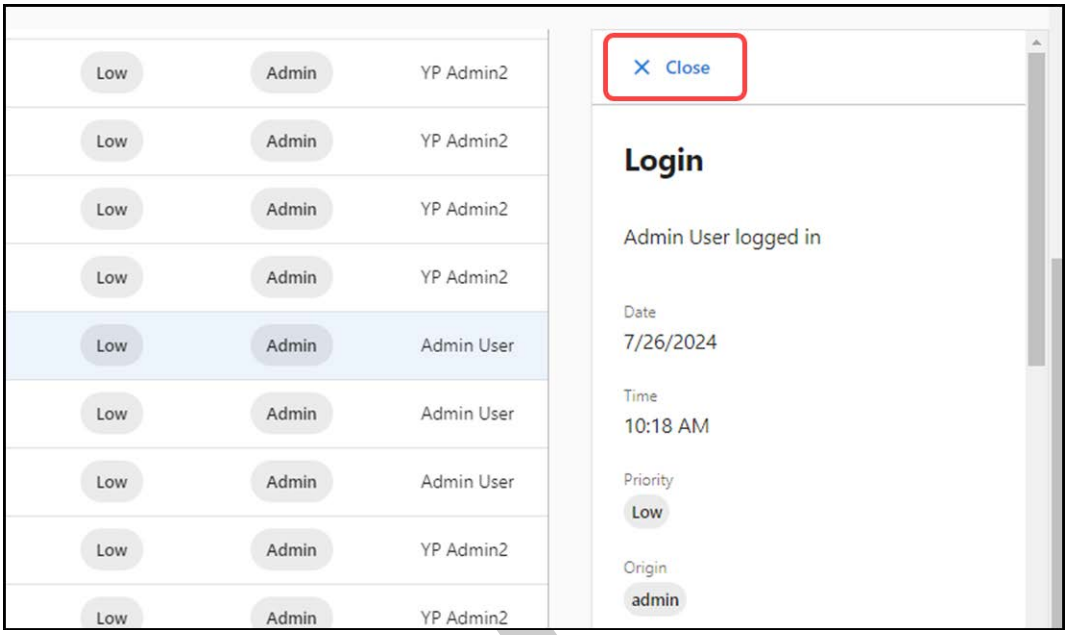
4. Click **Close** (available at the top in sliding panel) to exit.



Activity Log side panel - Close button

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About Settings

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

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

Organization settings — The options available under 'Organization settings' are 'Sites' and 'Fiscal calendar.'

Site settings — The options available under 'Site settings' are 'Site settings,' 'Payroll calendar,' and 'Day parts.'

Labor settings — The option available under Labor settings is 'Job configuration.'

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Working with 'Organization settings'

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

Viewing site information

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

To view the sites to which you have access:

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

'Sites' 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.

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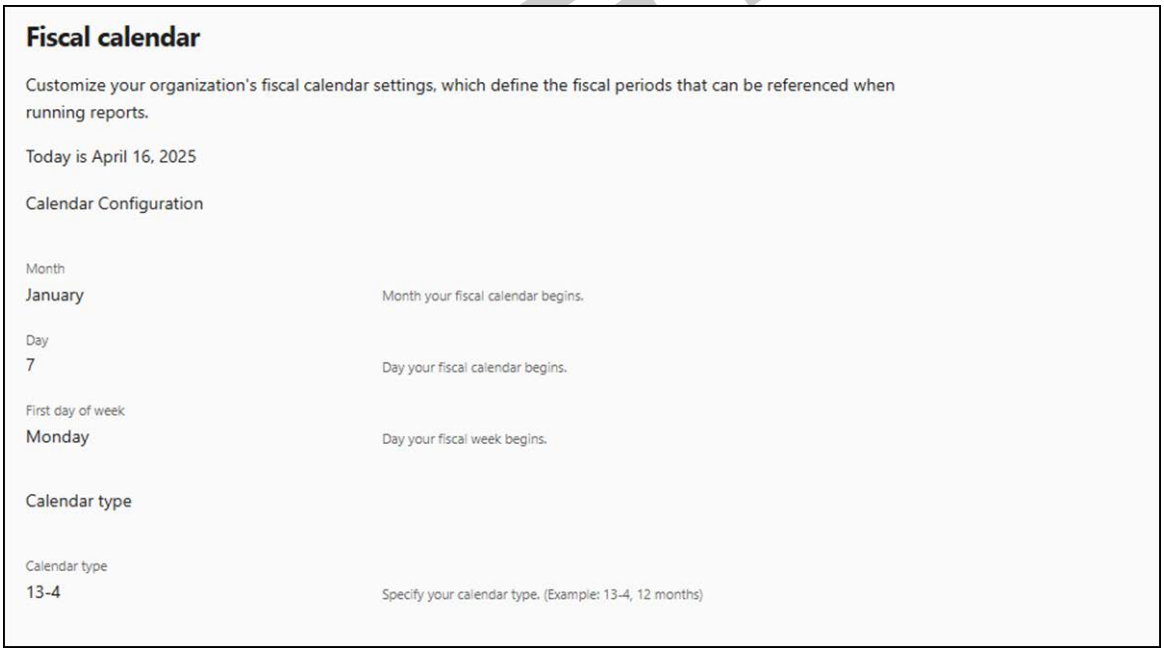
Configuring the fiscal calendar

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 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.

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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.

Fiscal calender type

6. Click **Save**.

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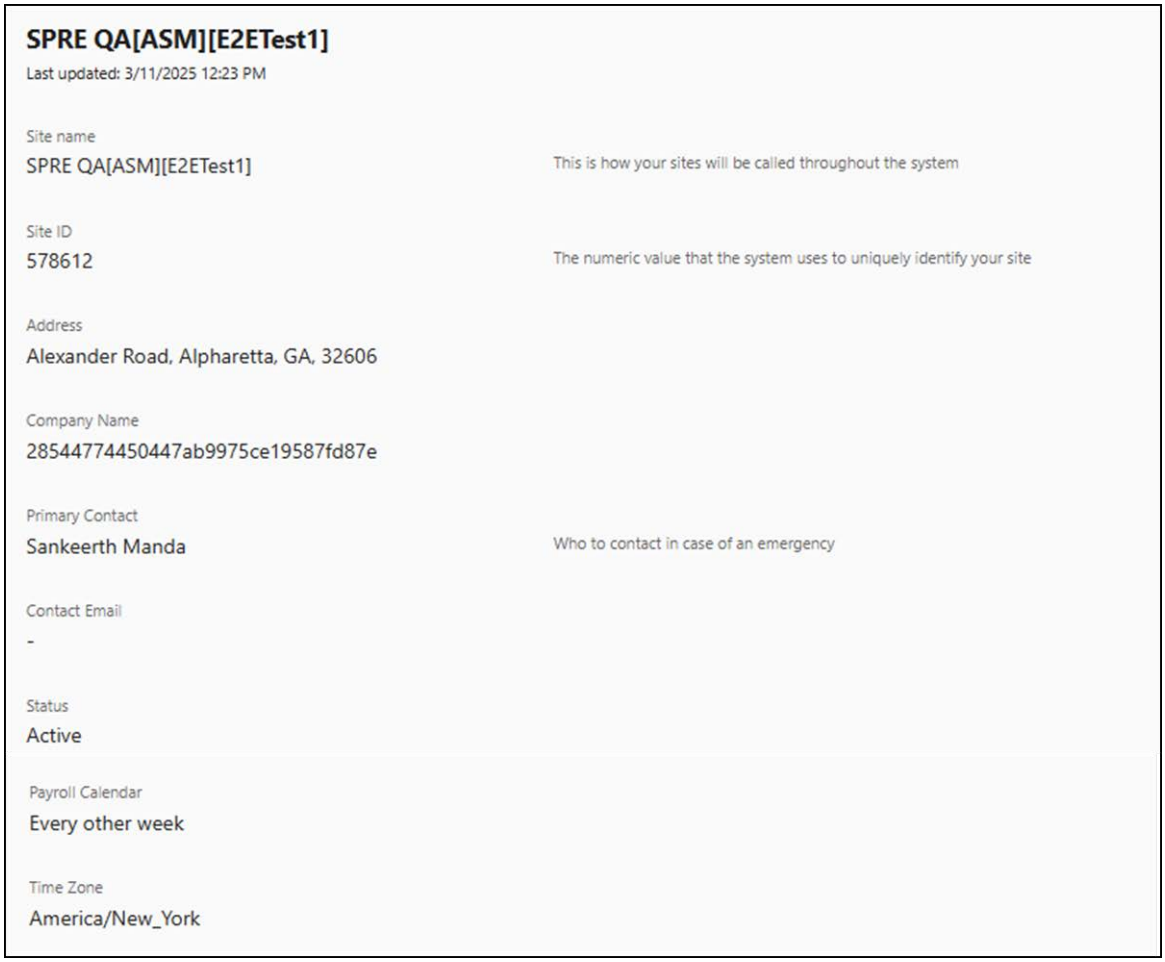
Working with 'Site settings'

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

Viewing Site Settings

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



'Site Settings' screen

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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.

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Configuring the payroll calendar for a site

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

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.

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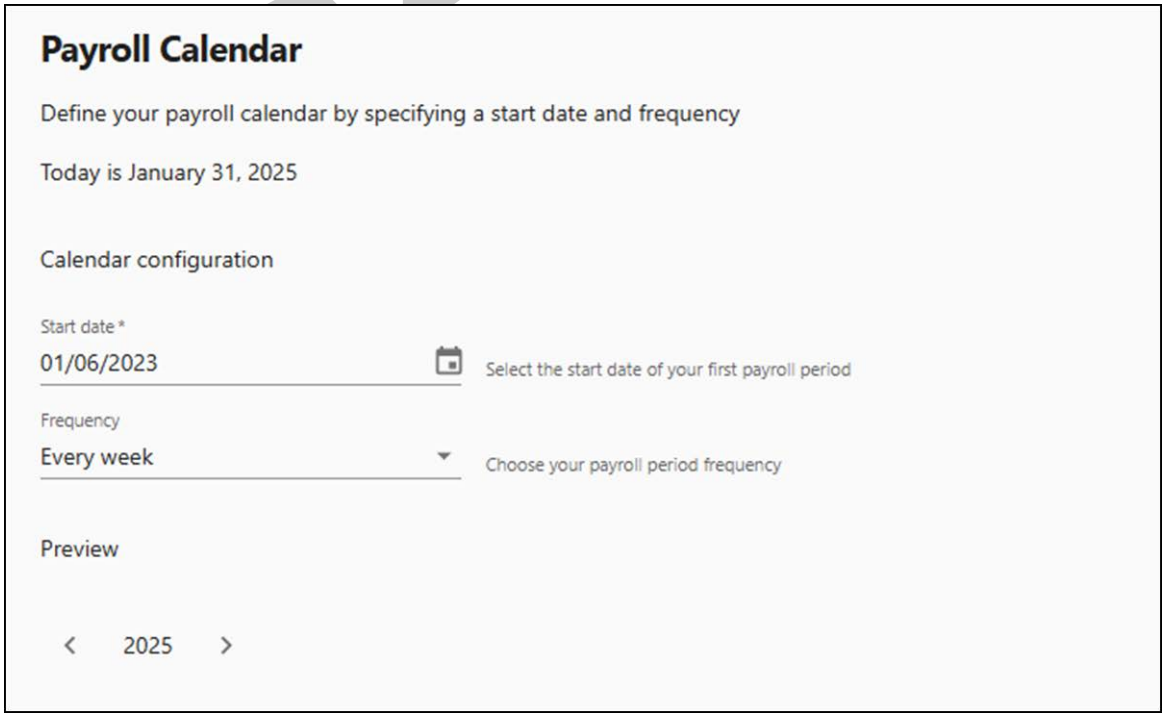

Payroll Calendar options

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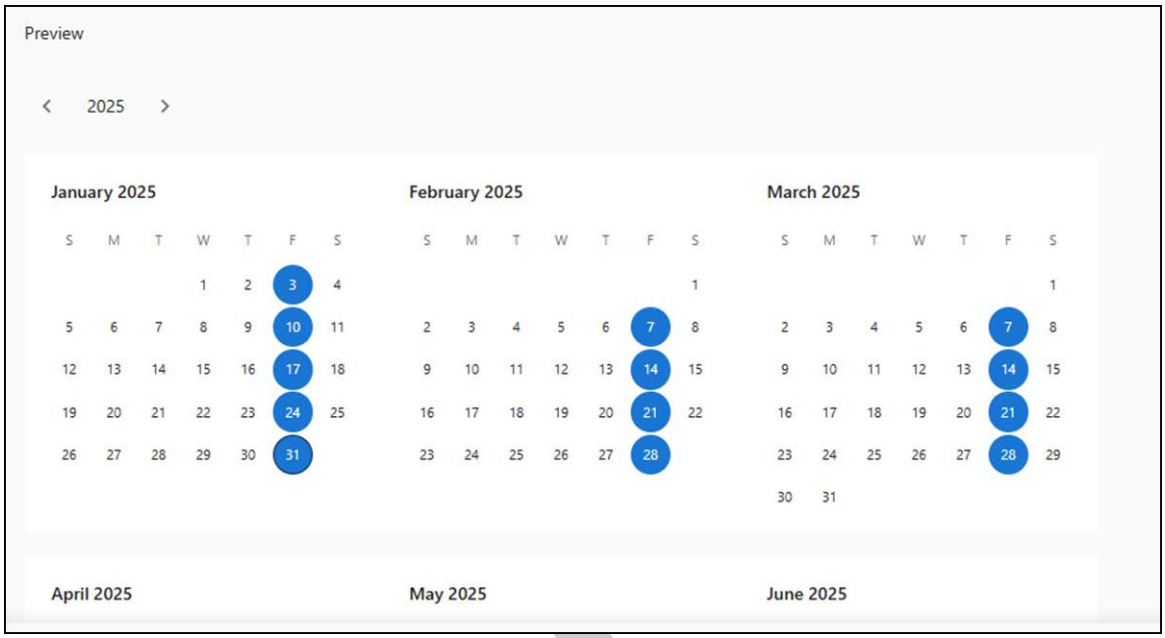
In the Preview section, the first day of each payroll week is highlighted. This helps you easily view the payment dates and plan accordingly.



Payroll Calendar preview

4. Click **Save**.

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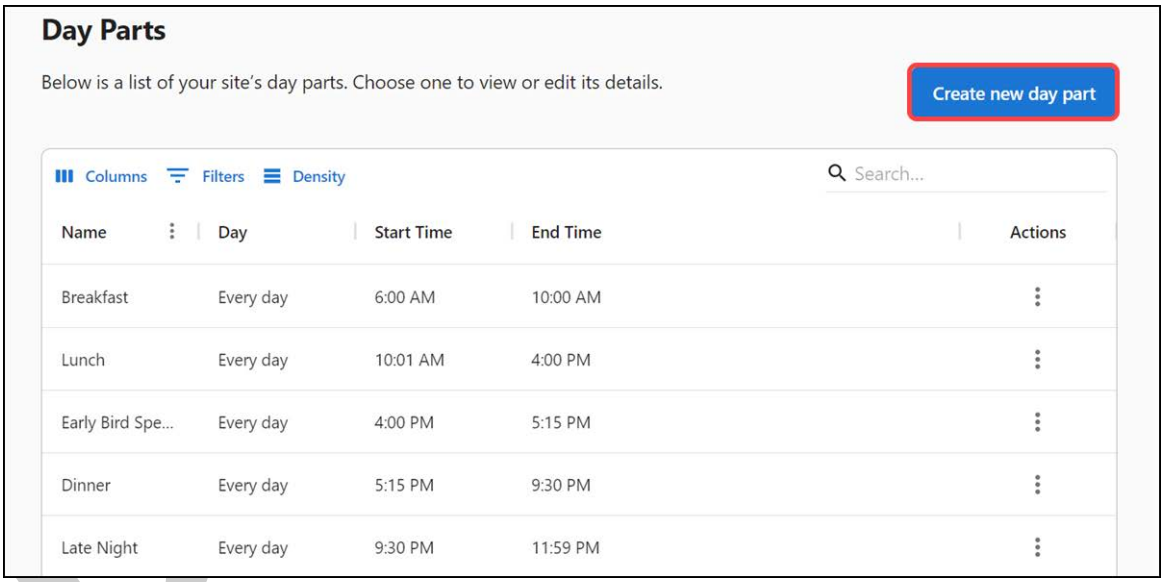
Configuring a day part

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

To configure a day part:

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



Creating a day part

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

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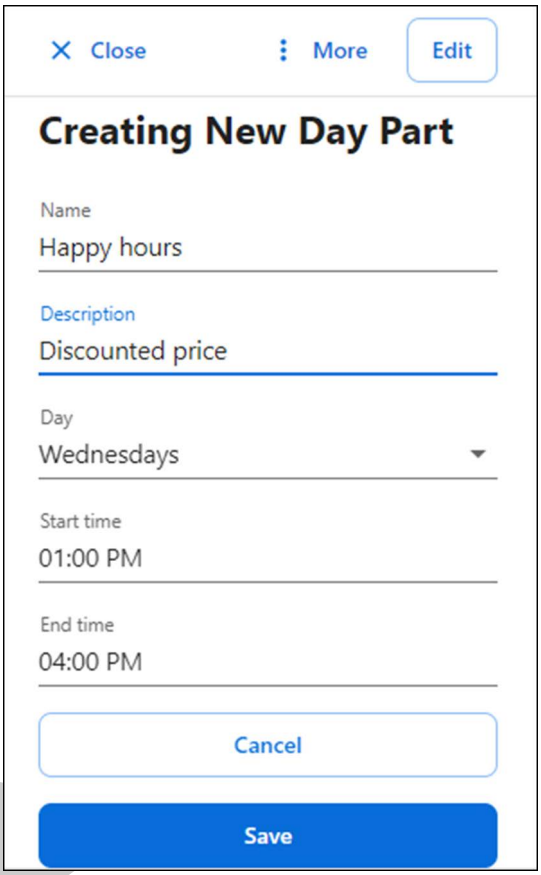
7. Select the **end time** of the day part.



Day part

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

To edit a day part:

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

To delete a day part:

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

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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.

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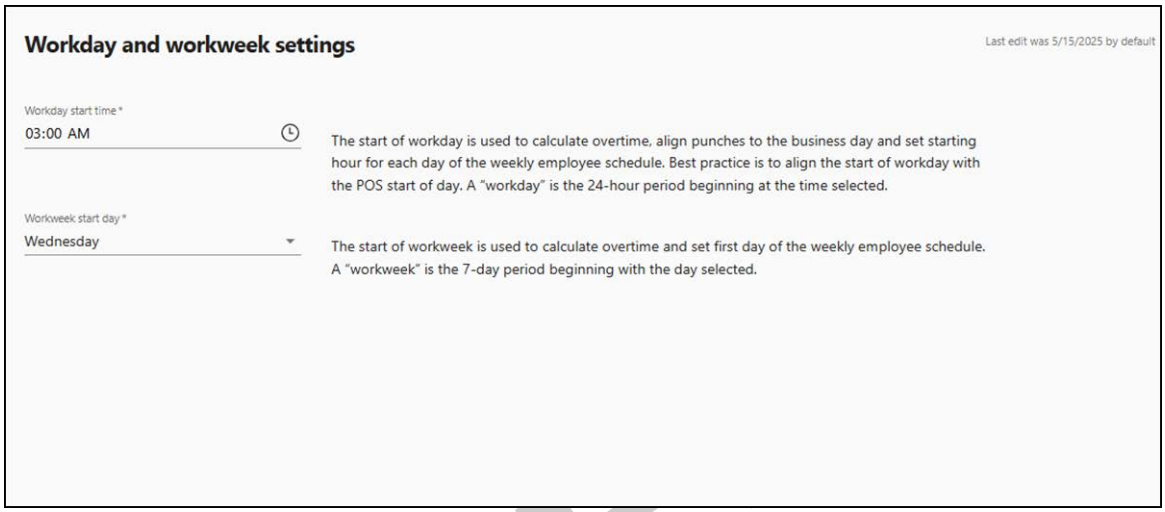
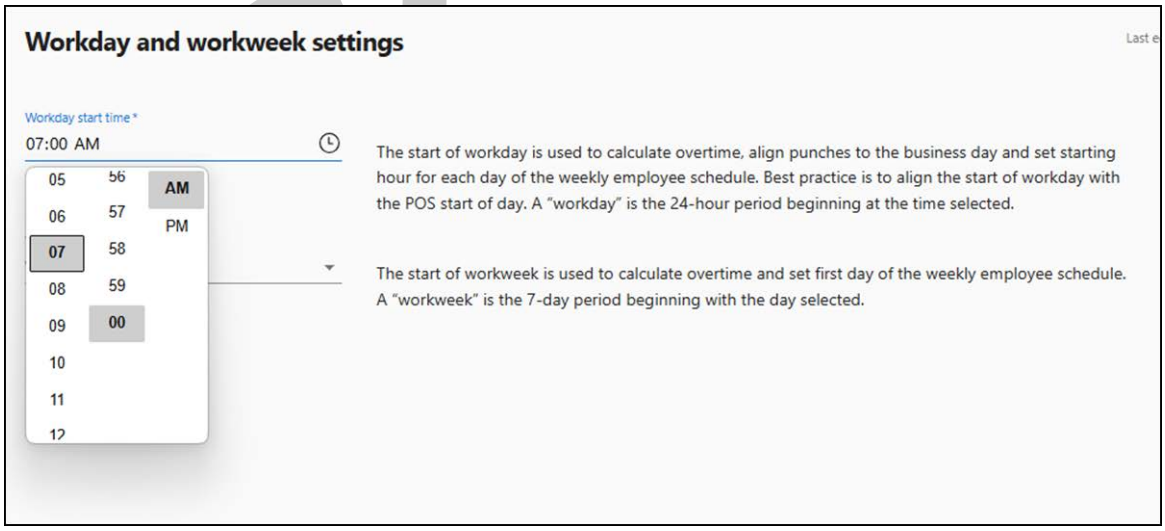
To set the workweek/workday for a schedule:

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



Workday and Workweek settings

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



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.

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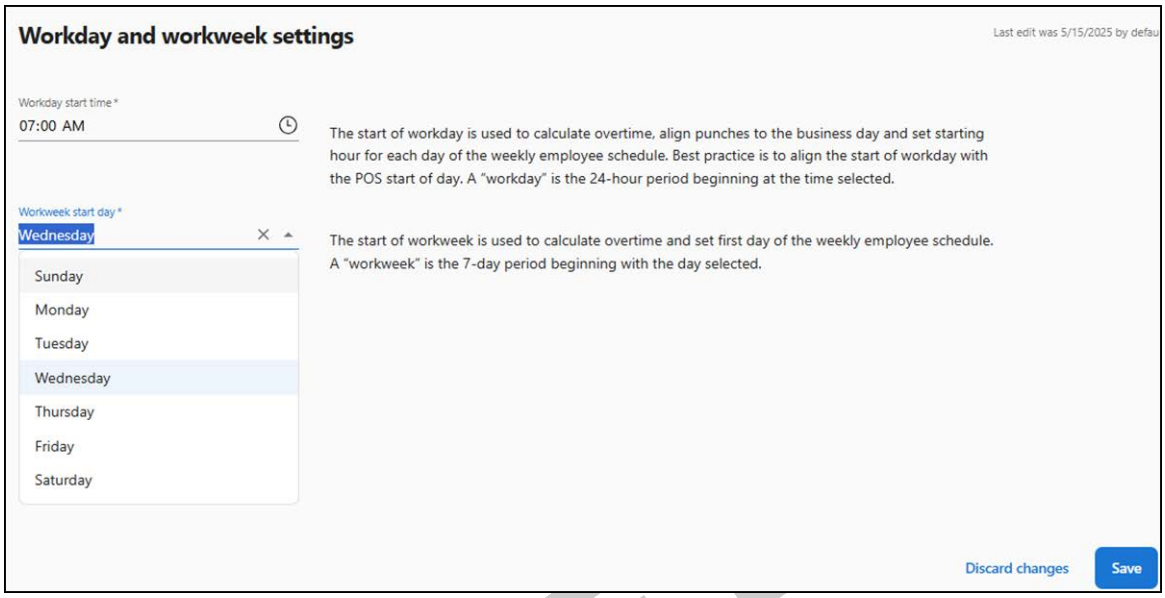
4. Click the **Workweek start day**.

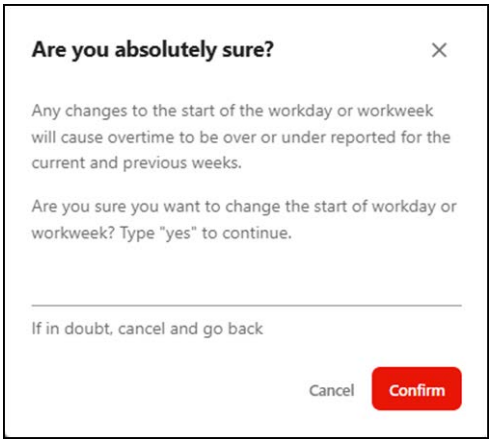


Workweek settings

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.**



Confirmation window

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

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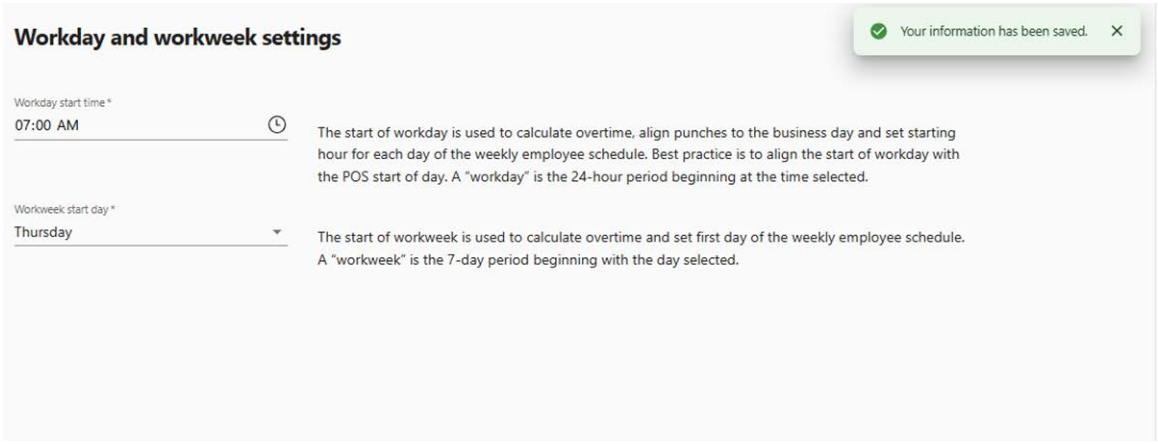
7. Type **yes** to continue and click **Confirm.**



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

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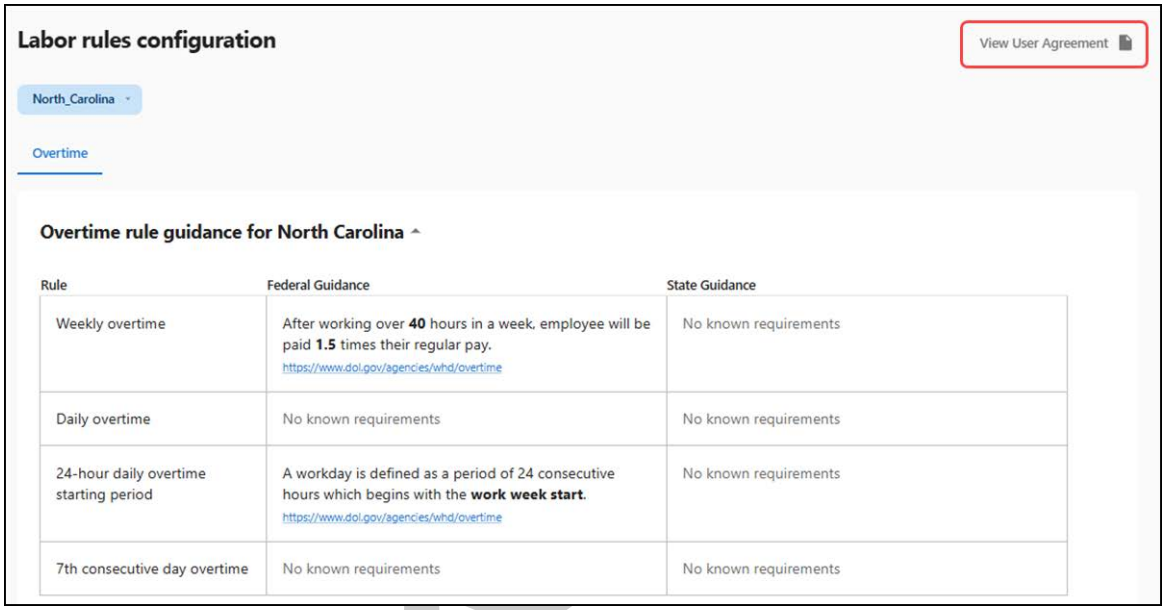
Labor Rules function and they cannot edit any of the rules until they have signed the agreement. The default rules are for reporting.

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



View user agreement

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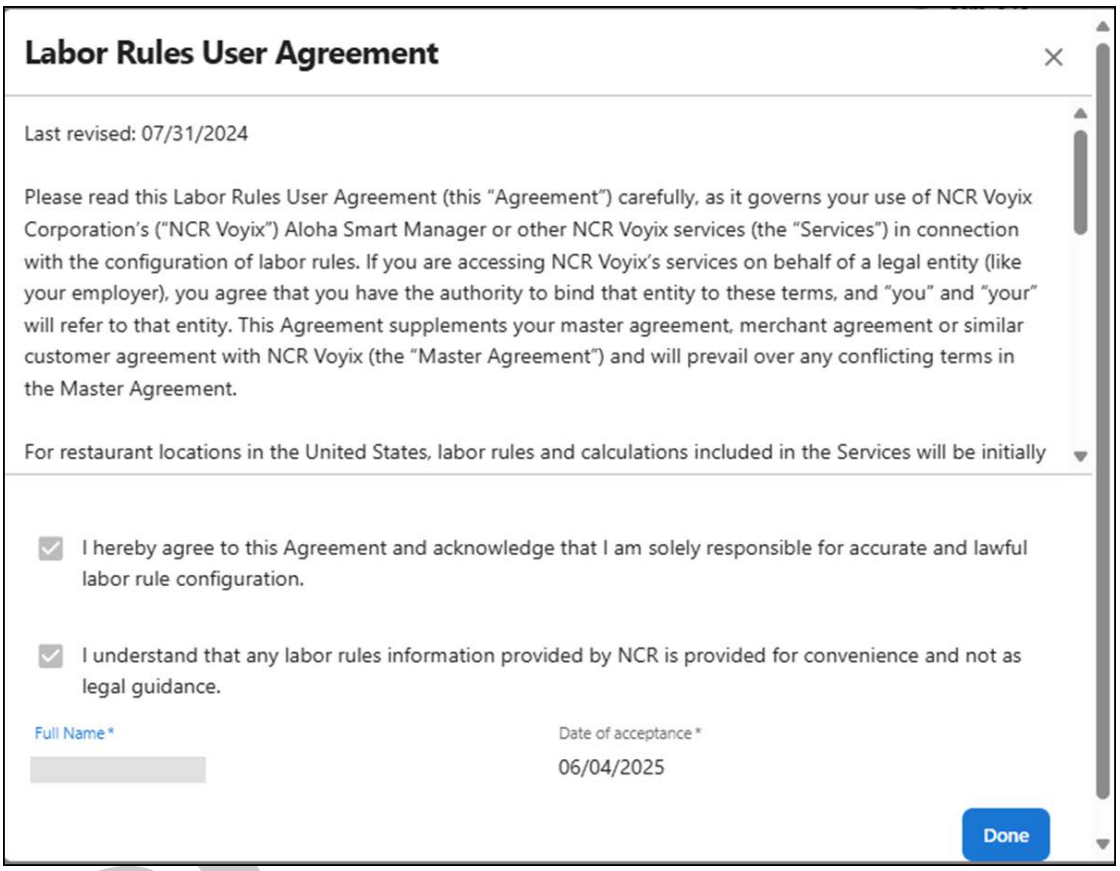
2. Click **View User Agreement**. The Labor Rules User Agreement screen appears.



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.

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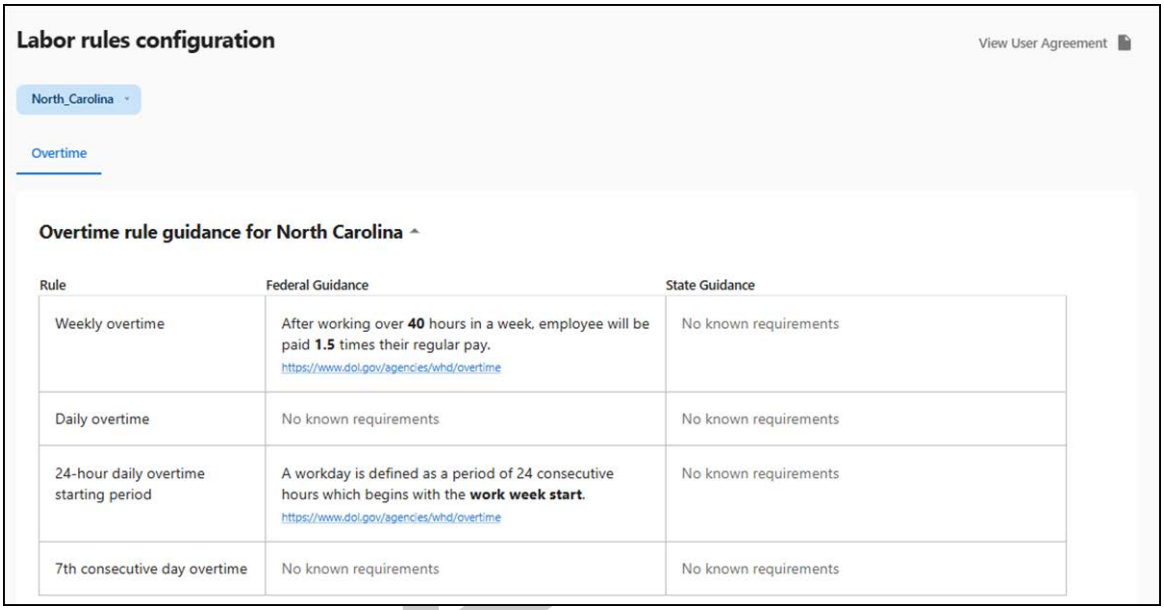
Viewing your labor rules

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

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.

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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.

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**.

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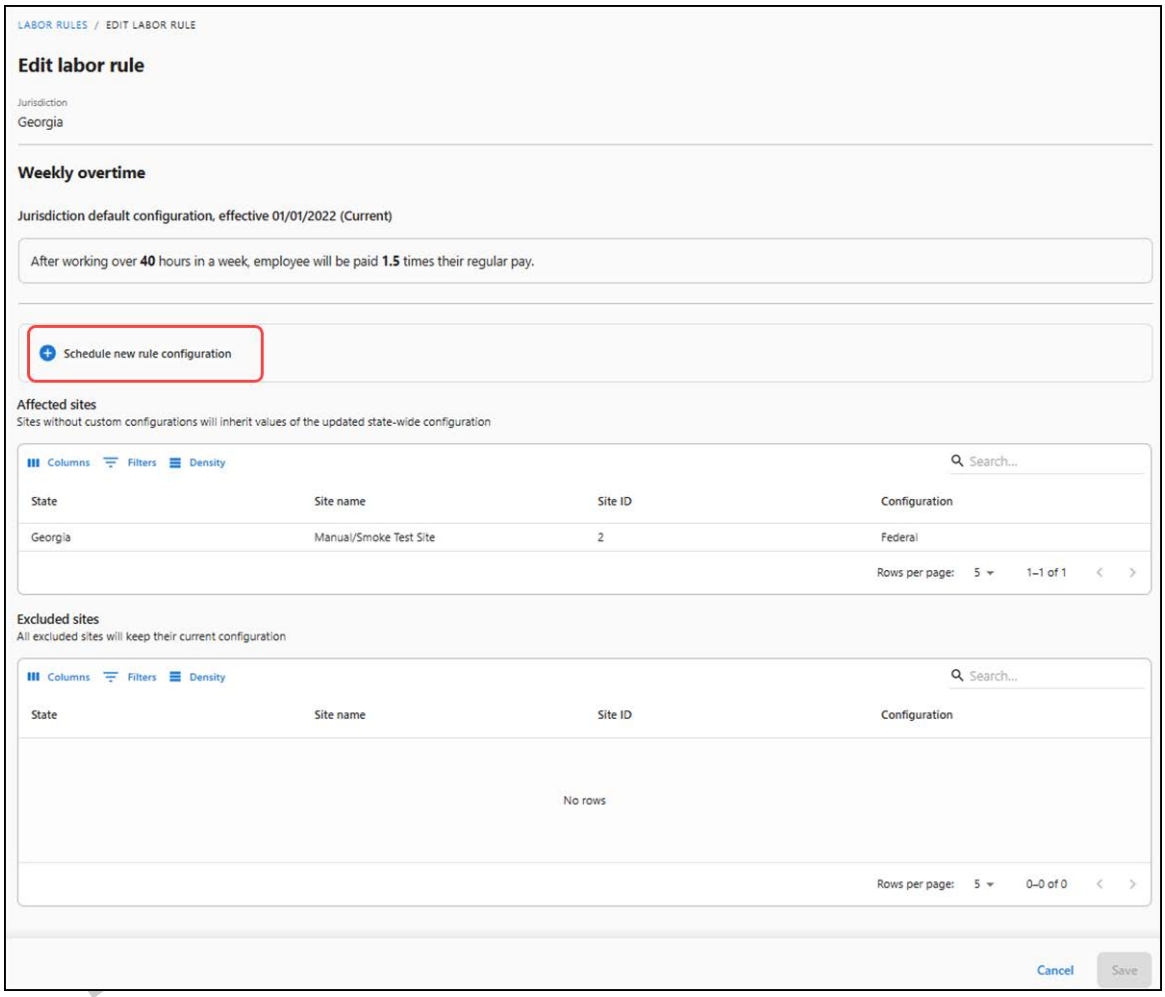
3. To edit a rule, click **Edit labor rule**. If the rule is currently inactive, you must first select the **check box** next to the labor rule type to enable 'Edit labor rule.' The 'Edit labor rule' screen appears. The currently defined labor rule appears as a reference.



Schedule new rule configuration

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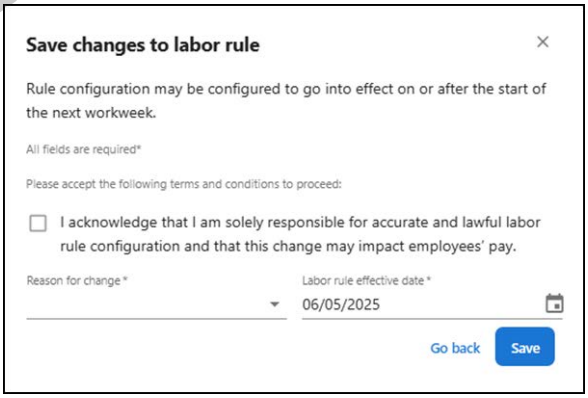
4. Click **Schedule new rule configuration** to add the customized rule to your site.

'Edit labor rule' screen

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



Acknowledge labor rules

9. Choose a **reason for the change** to the labor rule.
10. 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

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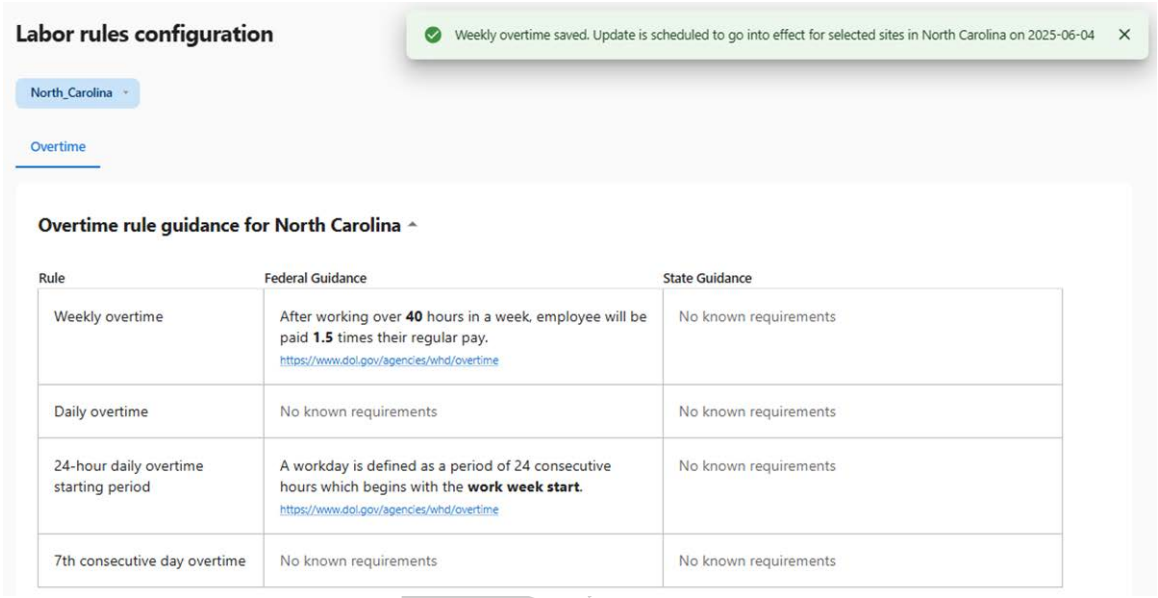
example, if you know the minimum wage is increasing on January 1st, you can enter the change now and not have to worry about it in December.

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



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.

Updated details in tabular format

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

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

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.

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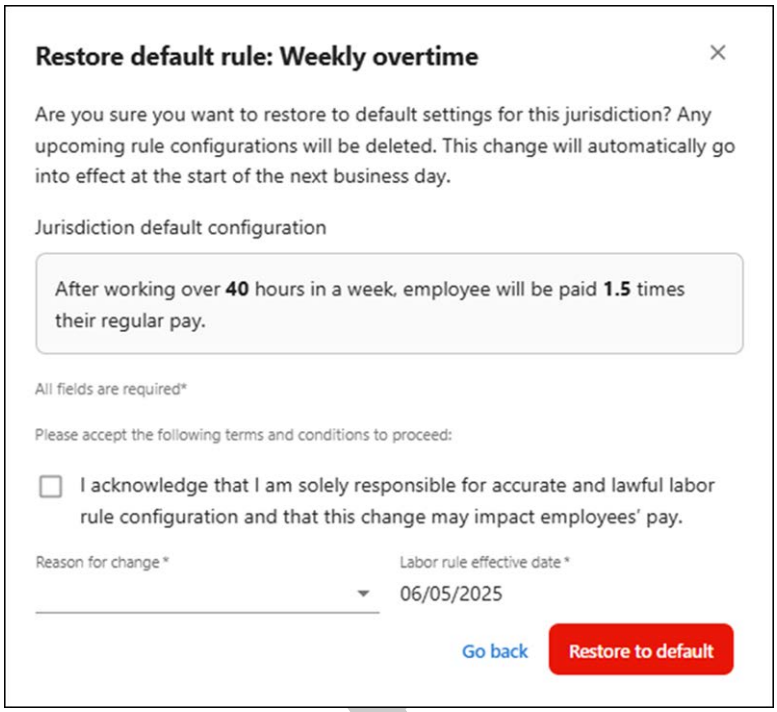

Acknowledge restore default

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.

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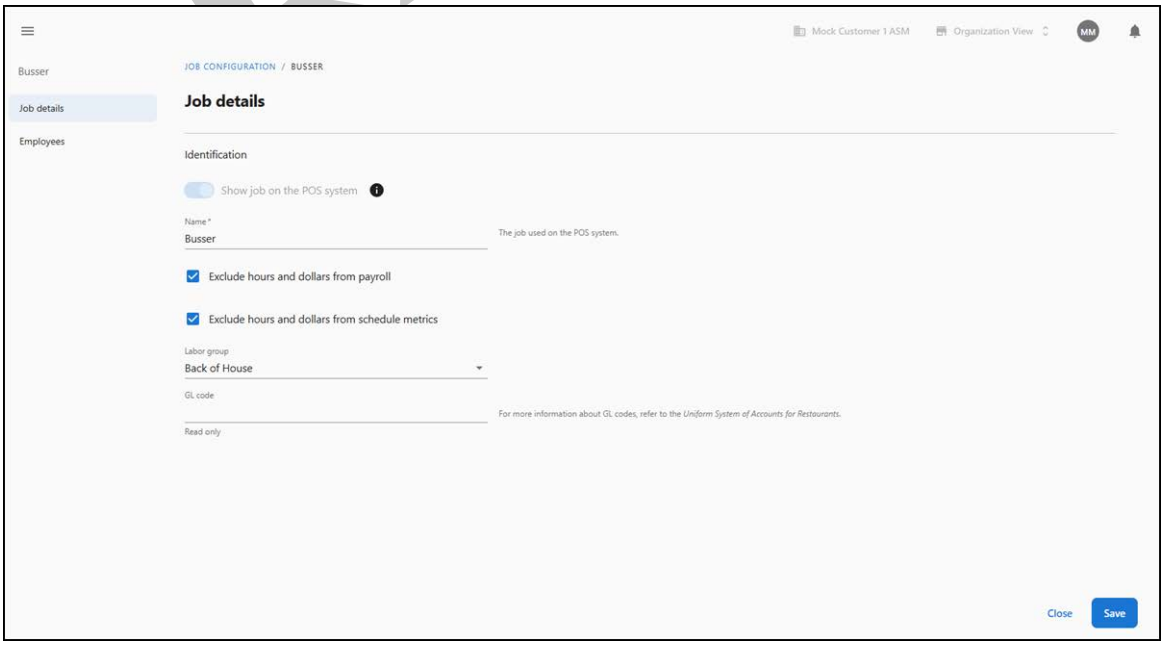
To modify job properties:

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

'Job configuration' screen

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



'Job details' screen

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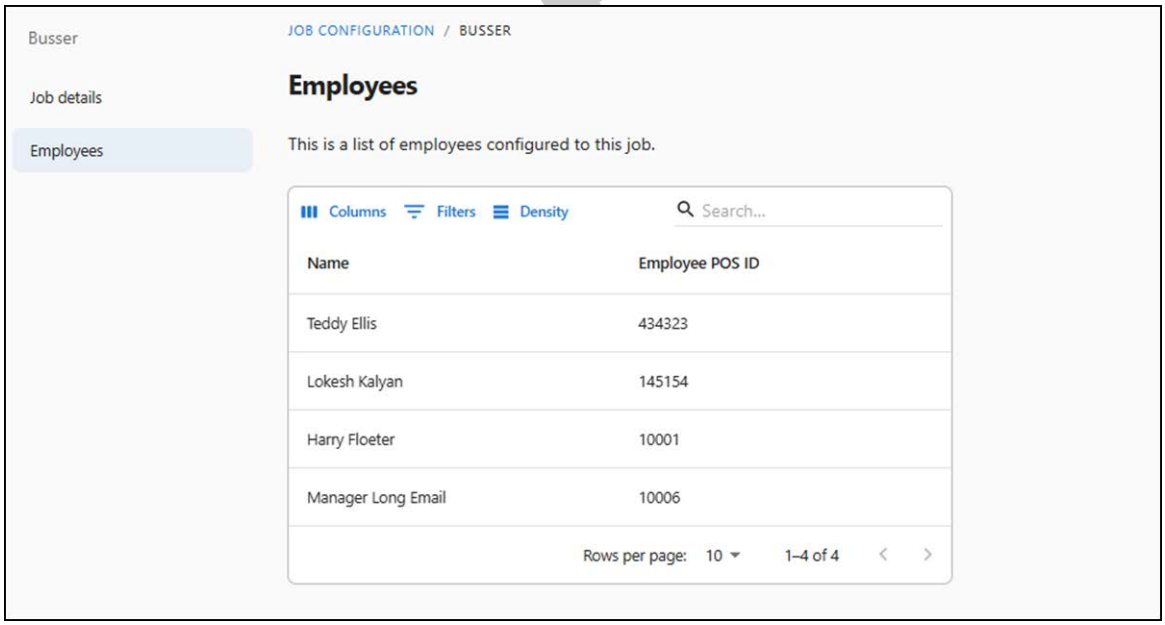
3. Select **Show job on the POS system** to make the job available for selection when logging in to the Front-of-House. The 'Show job on the POS system' option is available for selection only when no employees are assigned to the selected job. Toggle this option to the off position to hide it from selection 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.



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 30 for more information.

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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.

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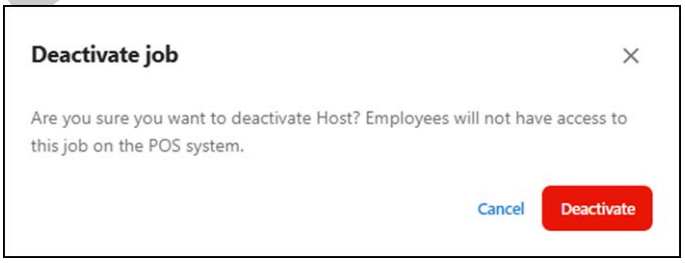
To deactivate a job:

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

Deactivate a job

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



Confirm job deactivation

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

Tip

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

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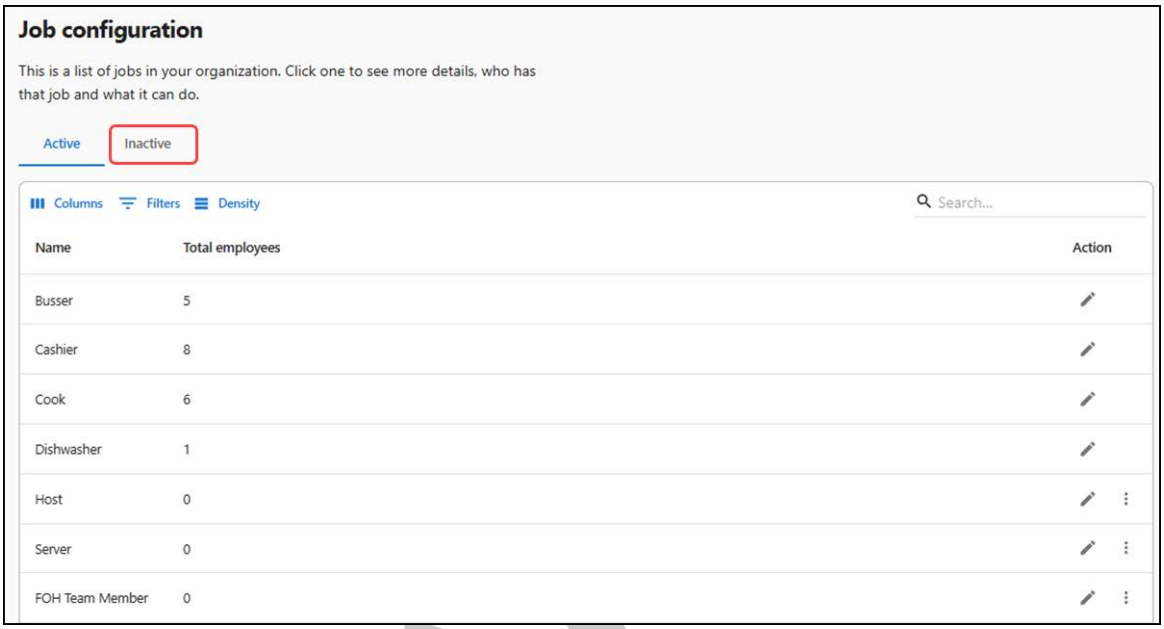
To activate a job currently set as inactive:

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



Inactive job

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

Activate a job

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

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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.

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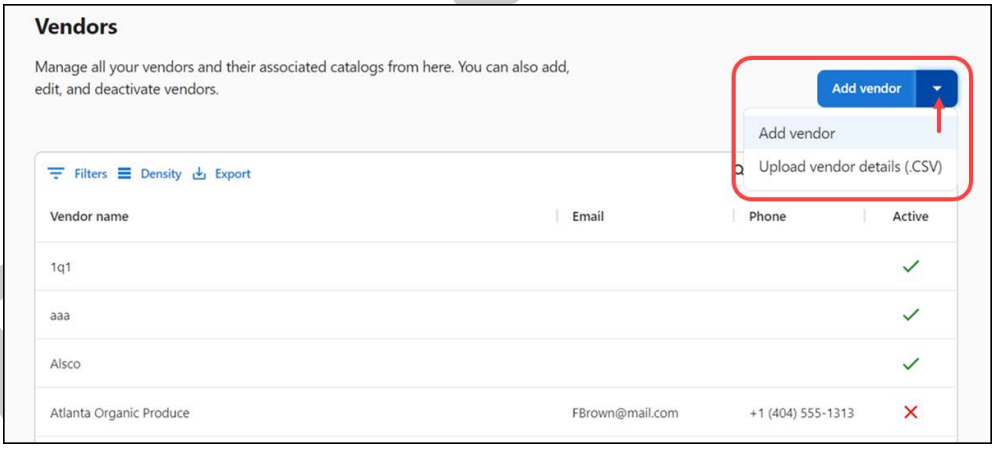
Column	Column name	Description
Column K	Country Code	The country code for the vendor, either the full name or abbreviation. Click 'Download country code list' for the list of country codes defined in Aloha Smart Manager.
Column L	Phone	The phone number associated with the vendor. The number must be prefixed 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

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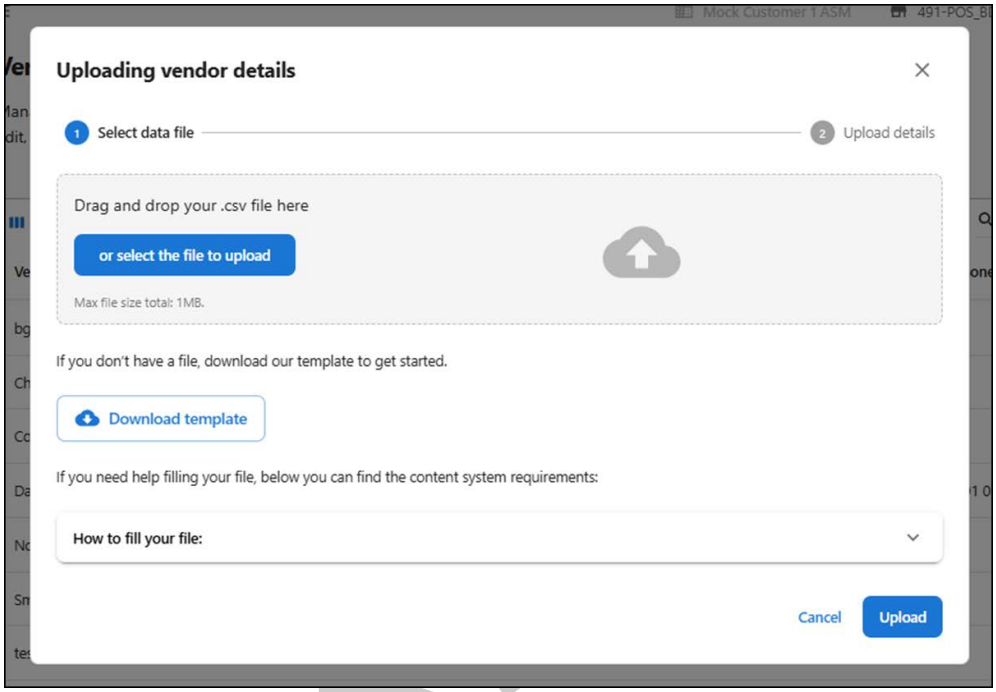
2. Click the **Add vendor** drop-down arrow and select **Upload vendor details (.CSV)**. The 'Uploading vendor details' screen appears.



'Uploading vendor details' screen

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

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Vendor Na	A/P Code	Country	Address 1	Address/S	City	State	Postal cod	Contact na	Contact tit	Country cc	Phone nur	Email add	Customer	Comments	
2	Mark	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@test6	123456	This is comments	
3	John	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@test7	123456	This is comments	
4	Francis	abc	US	h no 213	texas	dallas	NY	200358	test name	manager	91	9.59E+09	abc@test8	123456	This is comments	
5																

Adding vendor information in bulk

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

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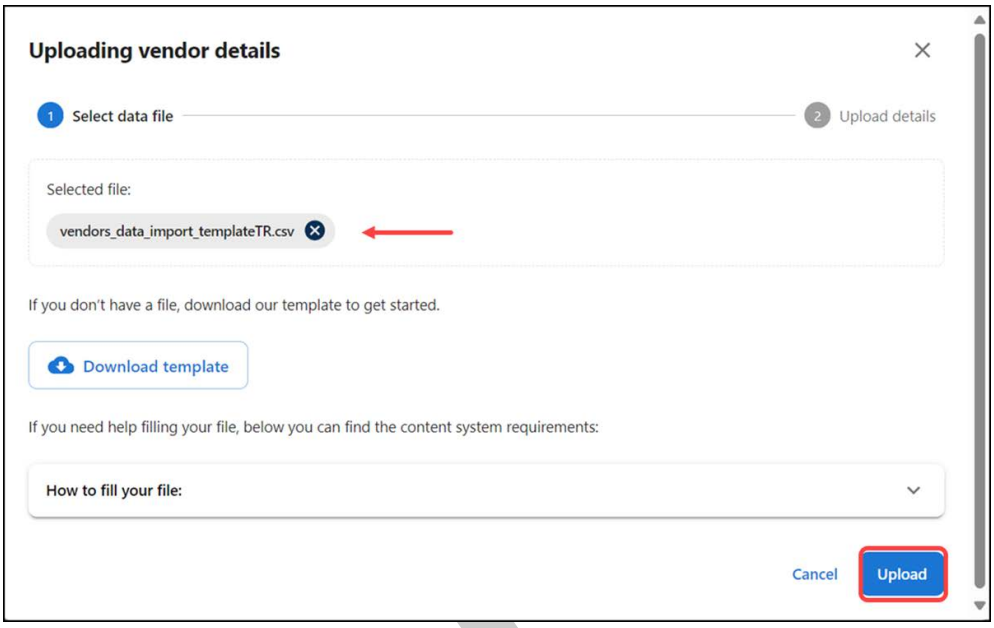
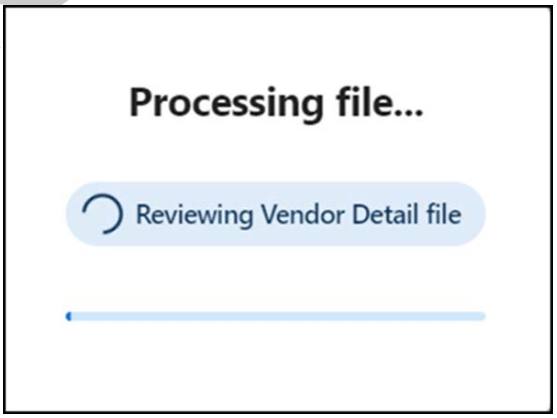
b. Click **or select the file to upload** to browse to and select **vendor_data_import.CSV** and click **Open**.



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

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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.

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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.

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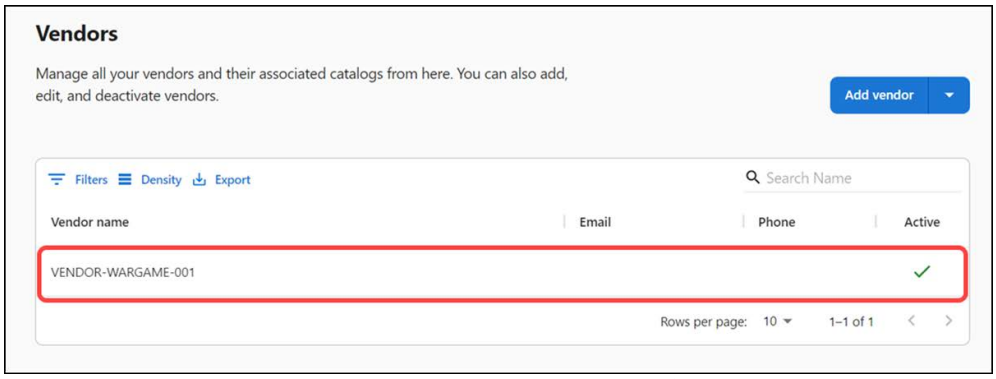
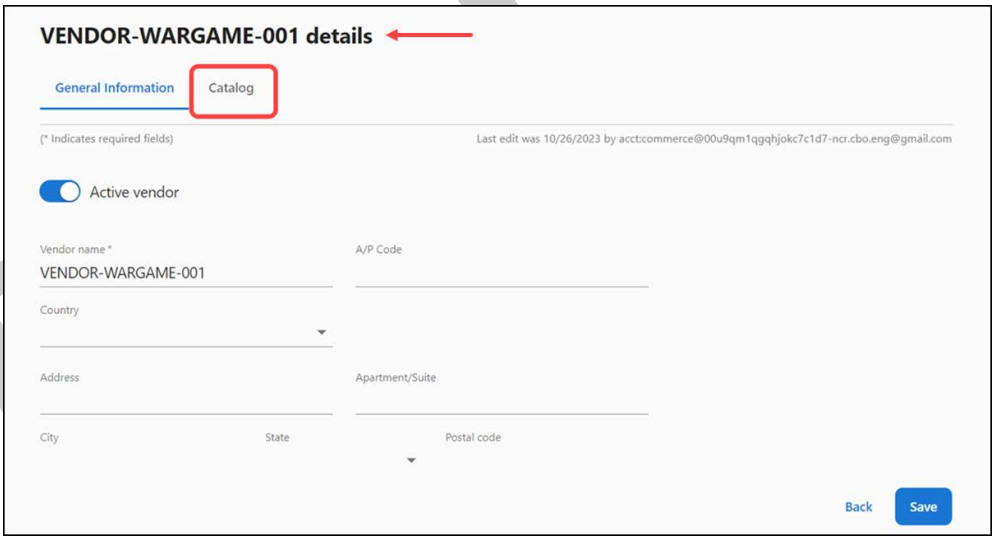
To upload vendor items in bulk:

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

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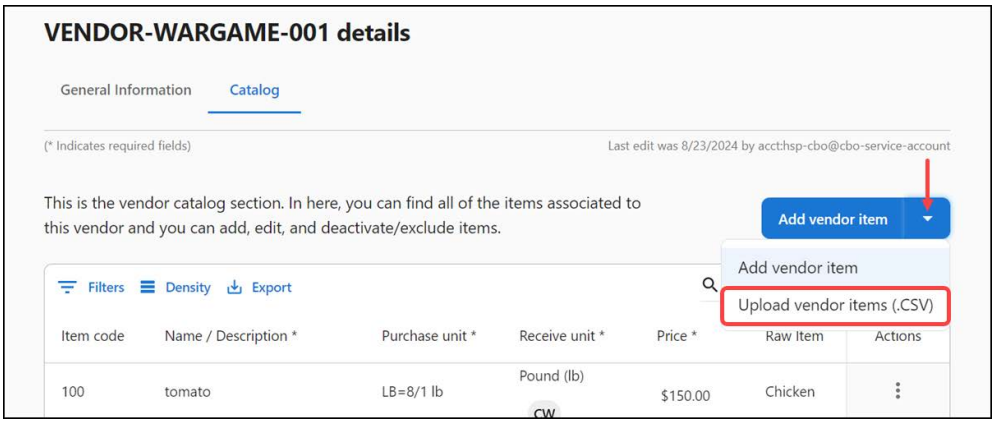
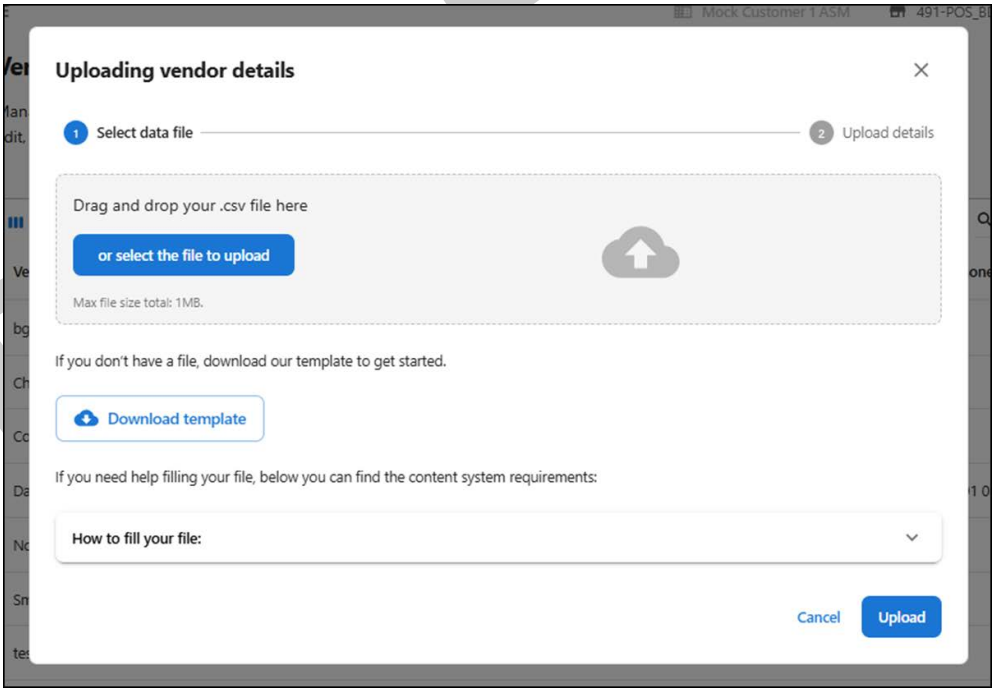
3. Select the **Catalog** tab.



'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.

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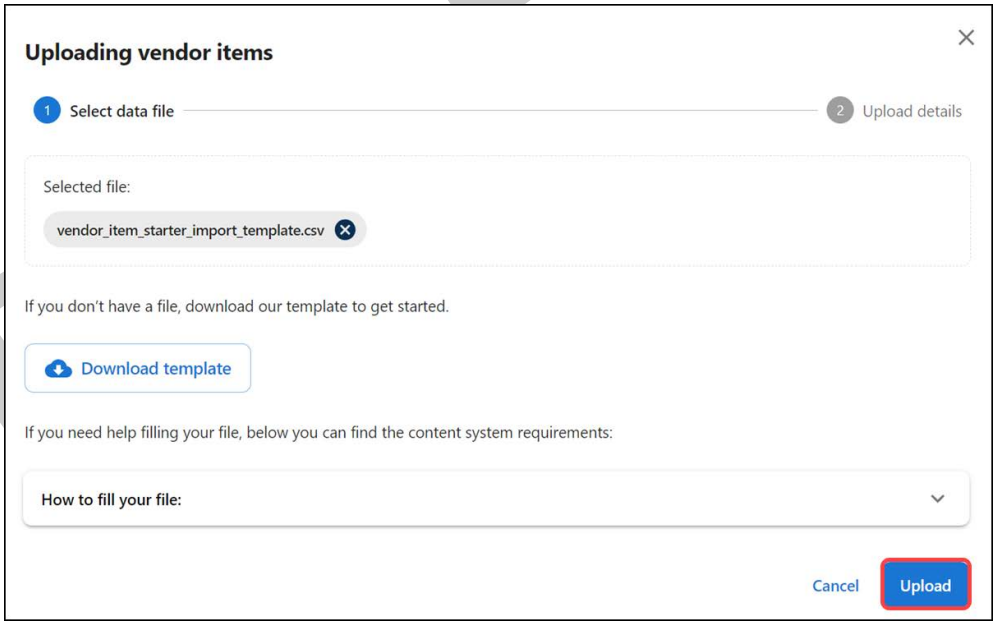
7. Type or copy and paste the **vendor item information** into vendor_item_import_template.CSV.

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

Bulk vendor items details in .CSV file

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



Selecting vendors items file list

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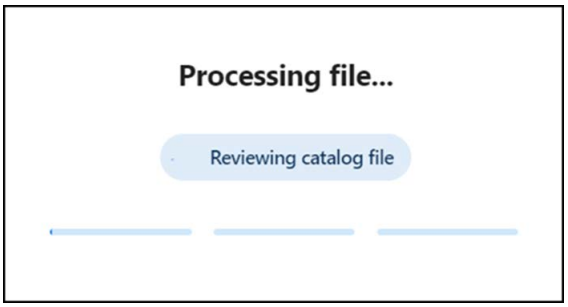
The 'Processing file' status screen appears.



'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.

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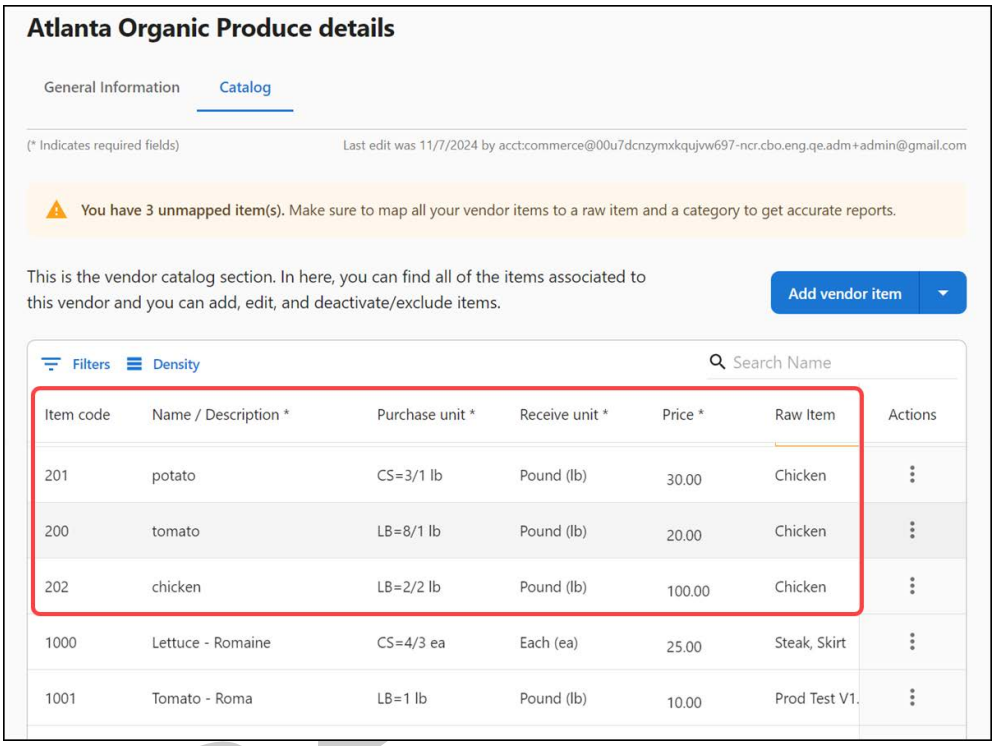
Once uploaded, the details appear in a grid format on the **Catalog** tab. The vendor details show the added vendor items.



Vendor items successful upload

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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.

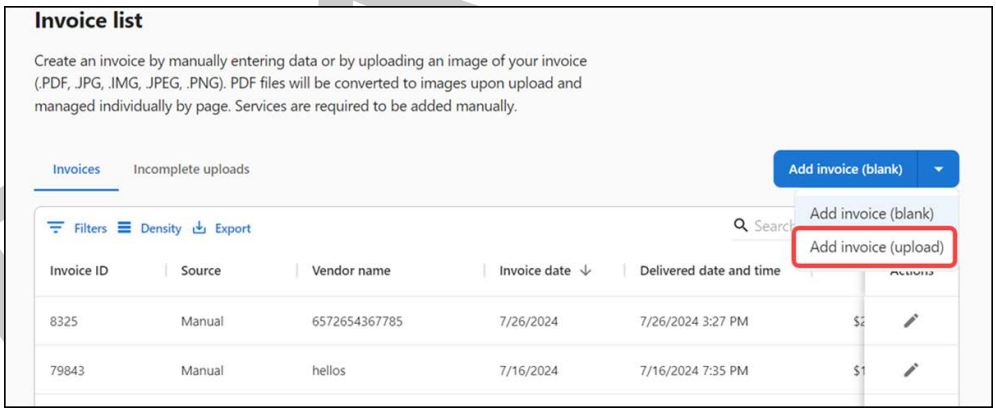
Tip

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.

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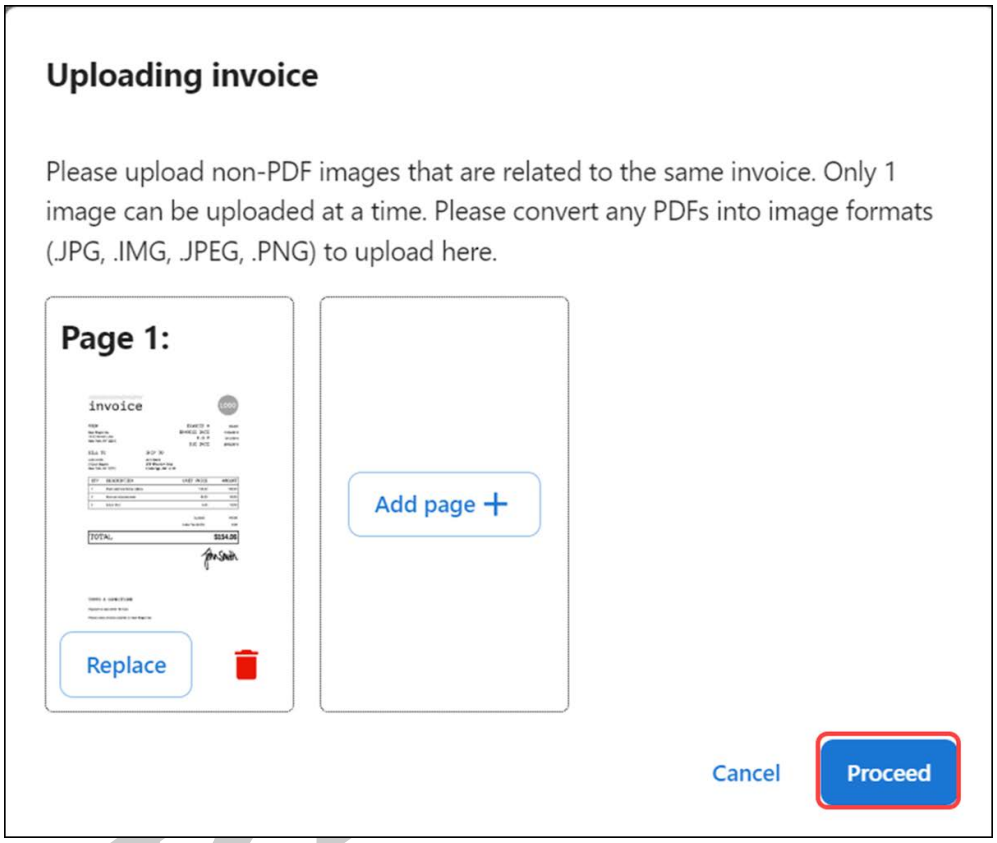
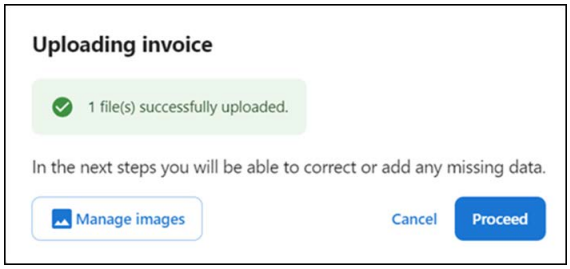
3. Browse to and select the **invoice** to upload. The 'Uploading invoice' screen appears.



'Uploading invoice' screen

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



'Uploading invoice' success message

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

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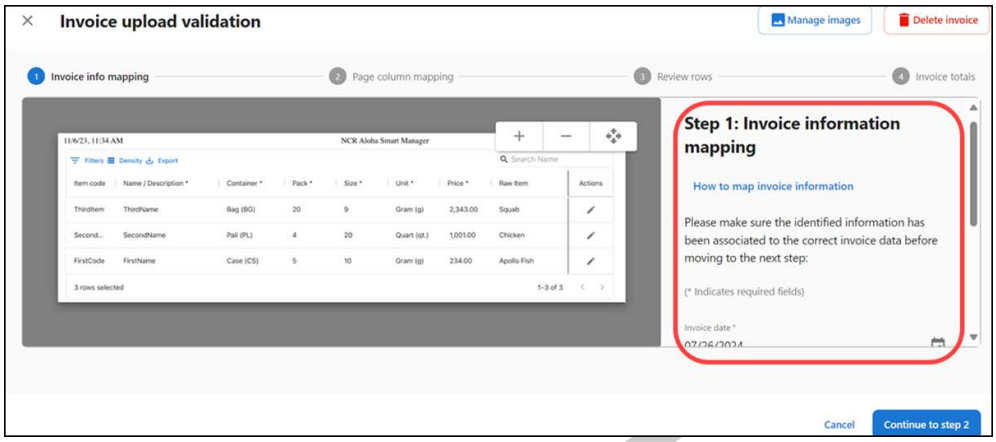
7. Click **Proceed** to continue with the mapping process. The 'Invoice upload validation' screen appears.



'Invoice upload validation' screen

8. Continue to Mapping invoice information to begin the process of validating the uploaded invoice.

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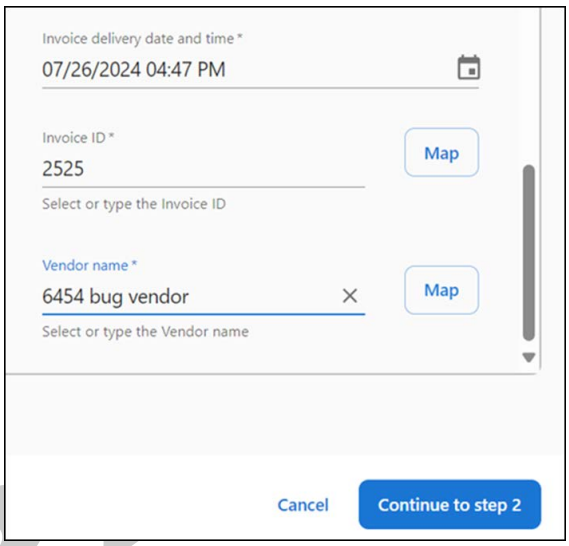
Mapping invoice information

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

Step 1: Invoice information mapping

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



Adding mapping details

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

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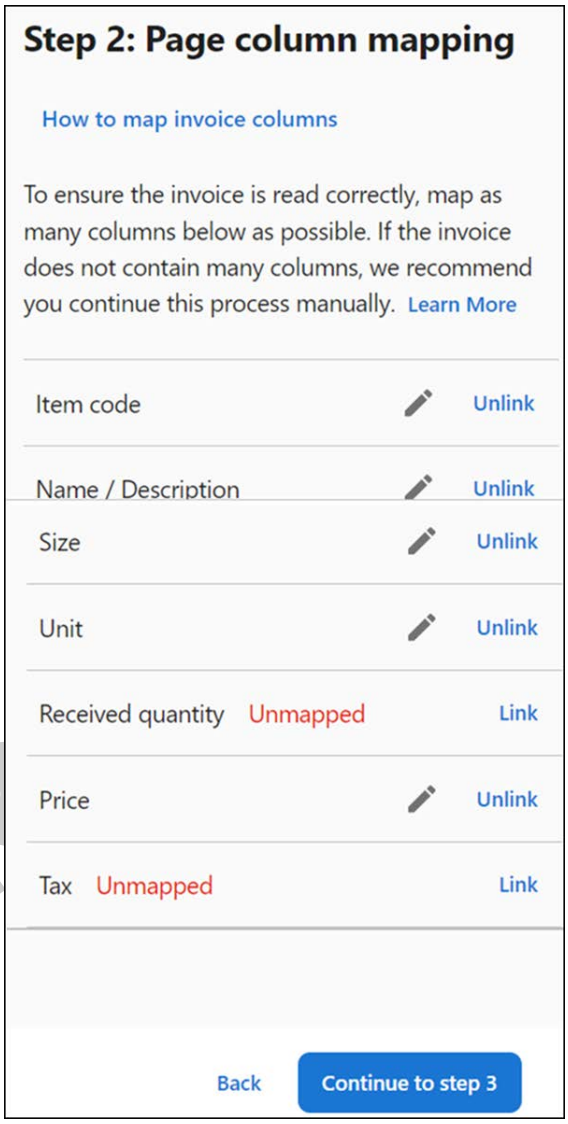
4. Click **Continue to step 2**. The 'Page column mapping' screen appears with instructions for **Step 2: Page column mapping**.



'Page column mapping' screen

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

Step 2: Page column mapping

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

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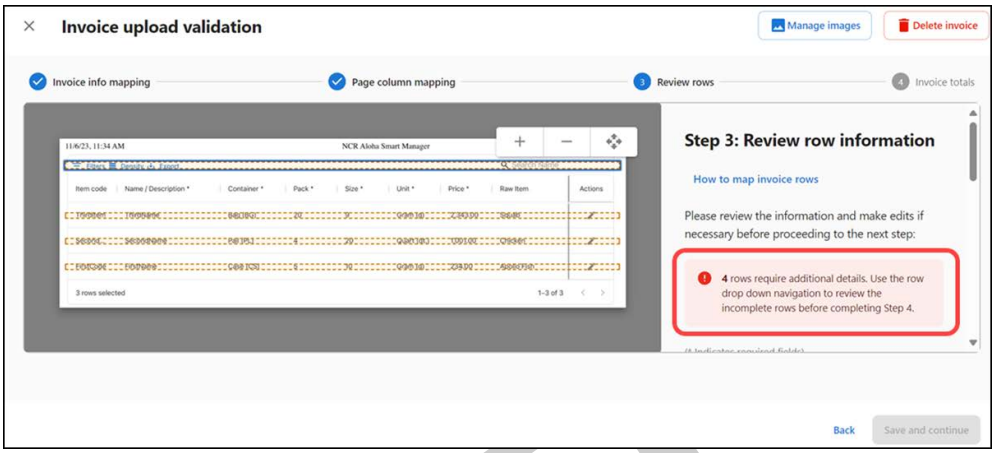
see how the value has been mapped by hovering over the highlighted rectangle on your invoice or column value.

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



'Review row information' screen

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

Step 3: Review row information

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

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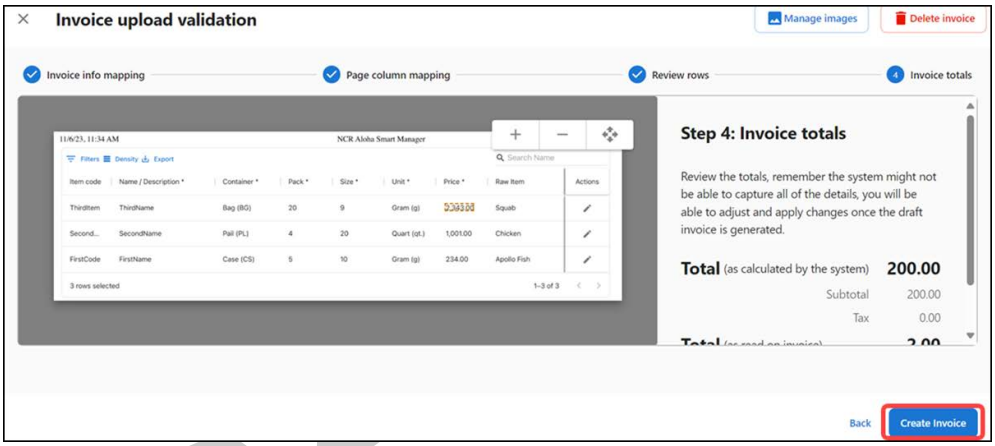
can **edit** all item details in your invoice. Based on the modifications, the system enables you to continue.

Note

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

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



'Invoice upload validation' screen

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

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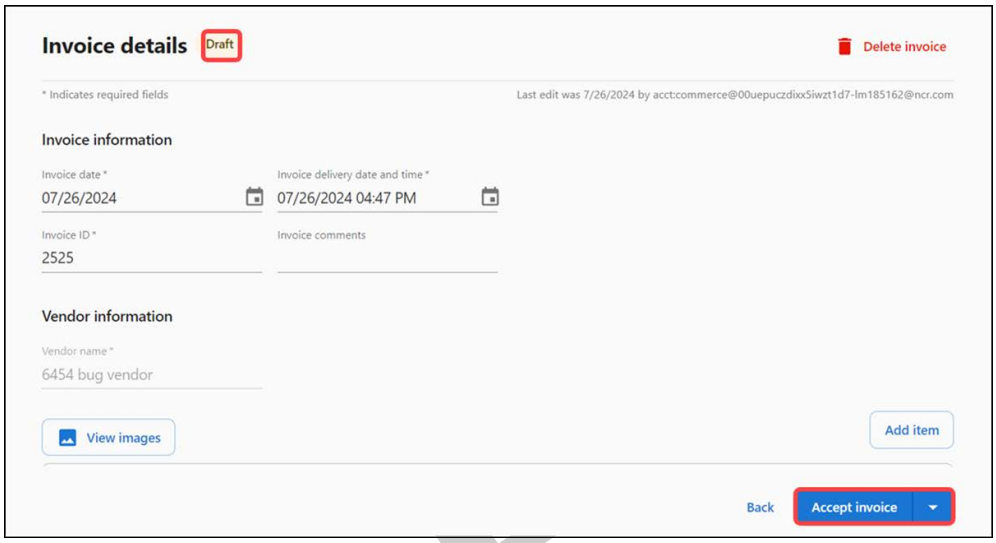
Step 4: Invoice totals

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



'Invoice details' screen

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

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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

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