

Aloha Smart Manager with Aloha Cloud: Core + Advanced

User Guide

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DRAFT

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03/23/2026	Updated the document to include Core, Advanced Inventory, and Advanced Analytics functionalities.
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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 Core and Advanced package information.

Core capabilities

The Core 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.

Advanced Inventory capabilities

The Advanced Inventory 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](#)
- [Working with purchase orders](#)
- [Managing recipes](#)
- [Viewing and mapping sales items](#)
- [Viewing modifier groups](#)
- [Counting inventory and managing locations](#)

Advanced Analytics capabilities

In Advanced Analytics, you can work with the Reports menu to customize and publish reports that align with your business needs. These capabilities enable teams to tailor insights, share standardized views, and ensure consistent access to actionable sales data.

- [Working with reports menu](#)
 - [Customizing reports](#)
 - [Publishing reports](#)

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](#)
- [Accessing Help](#)

Package offerings

ASM is offered in four packages which you can opt based on your restaurant's size and business requirement. The available packages are:

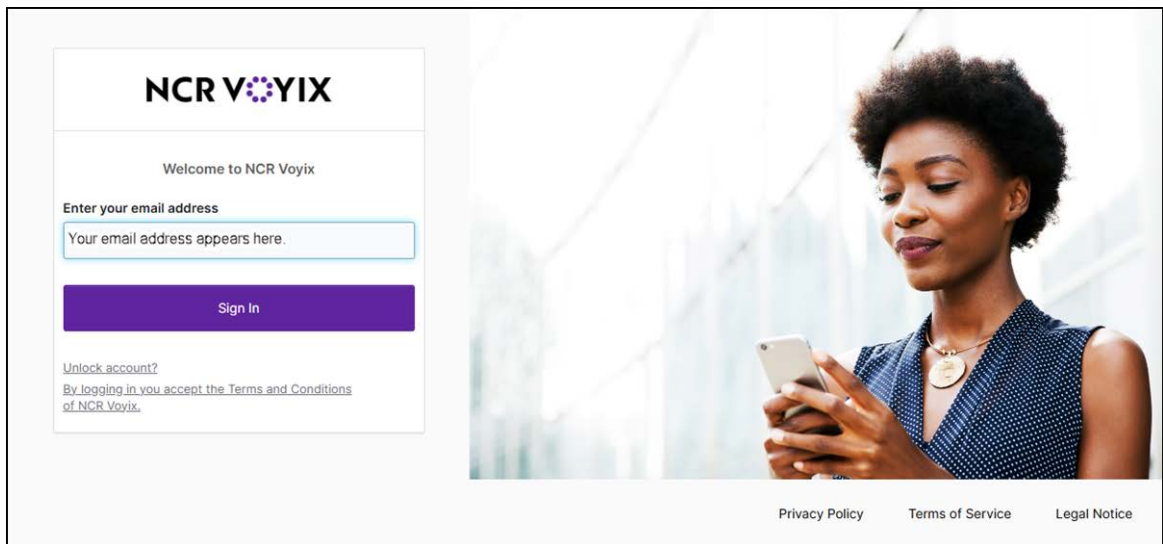
- **Core** – The 'Core' package is targeted at very smaller and simpler (one to five) restaurant operators. It includes all the Base package capabilities and in addition to the following capabilities:
 - The ability to manage restaurant employee data and labor cost.
 - Do weekly scheduling.
 - Manage House Accounts.
 - Manage invoices.
 - Employees can view their weekly schedule and update their personal data on the restaurants Employee website.
- **Advanced** – The 'Advanced' package includes all capabilities of:
 - Core packaging
 - Advanced Inventory
 - Advanced Analytics

Signing in and logging out of Aloha Smart Manager

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

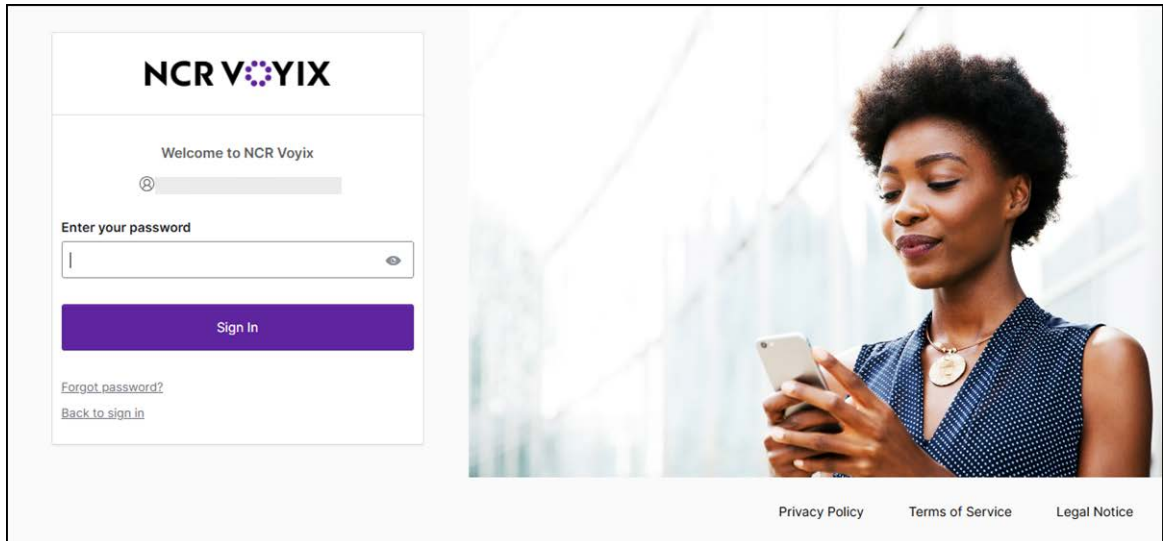
To sign in to ASM:

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



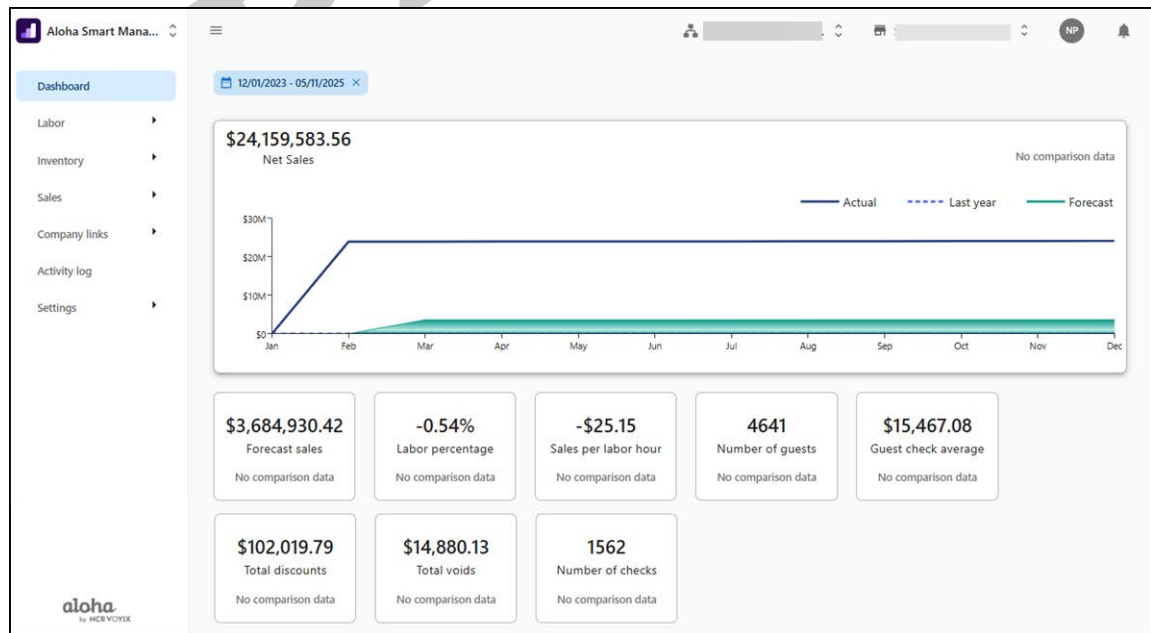
Welcome to NCR Voyix email address entry screen

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



Welcome to NCR Voyix password entry screen

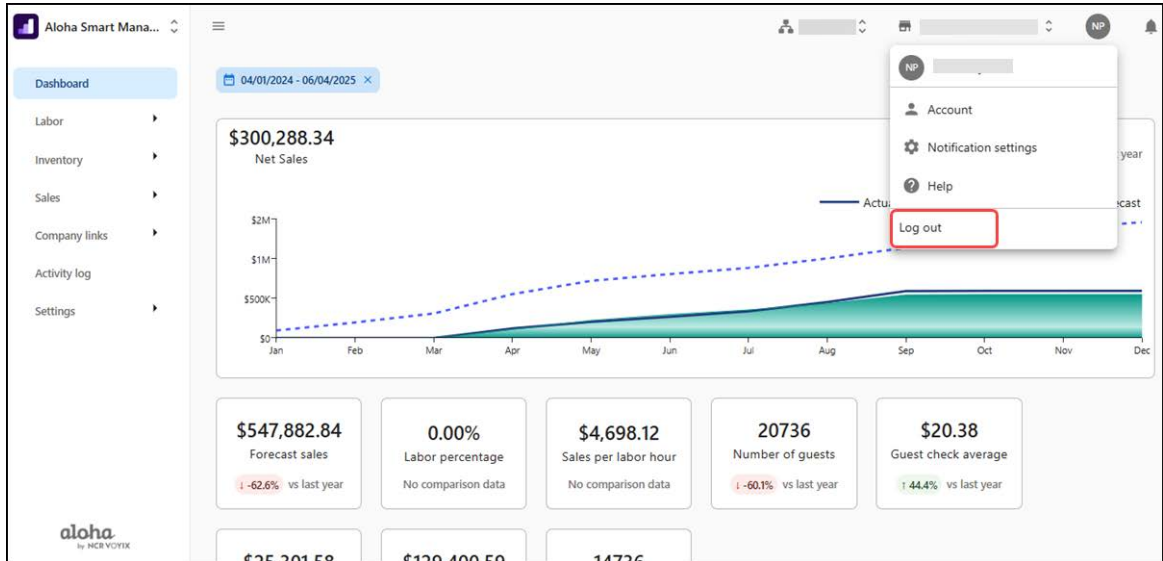
3. Type your **password** and click **Sign In**. Aloha Smart Manager opens to the landing page with the store mapped to your account appearing in the top right corner and the dashboard appearing on the screen, if available for your user profile.



ASM landing page

To log out of ASM:

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



Logging out of ASM

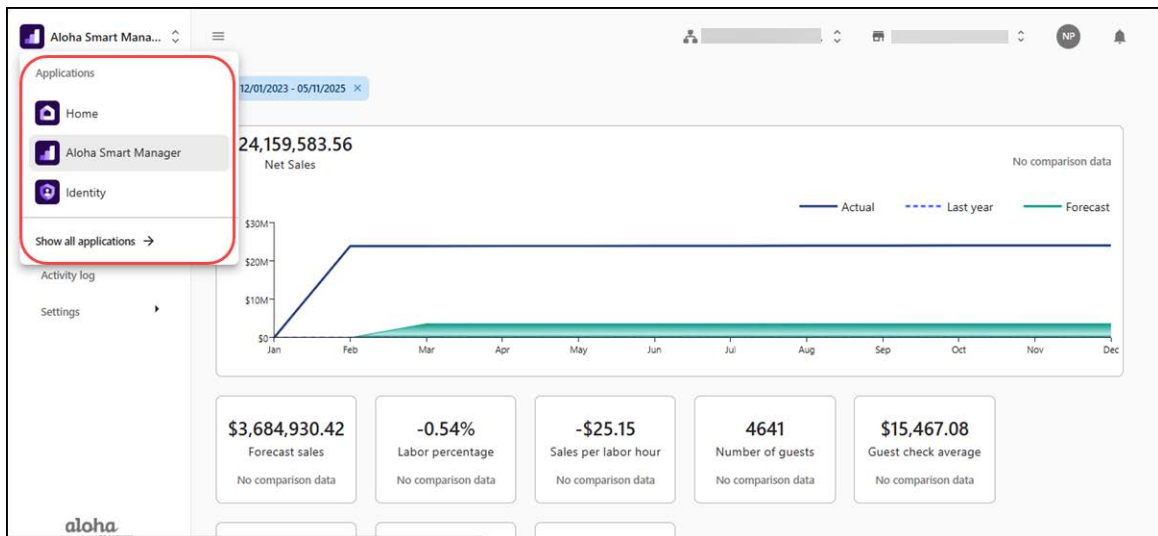
2. Click **Log out**.

Switching between apps

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

To switch between applications using app switcher:

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

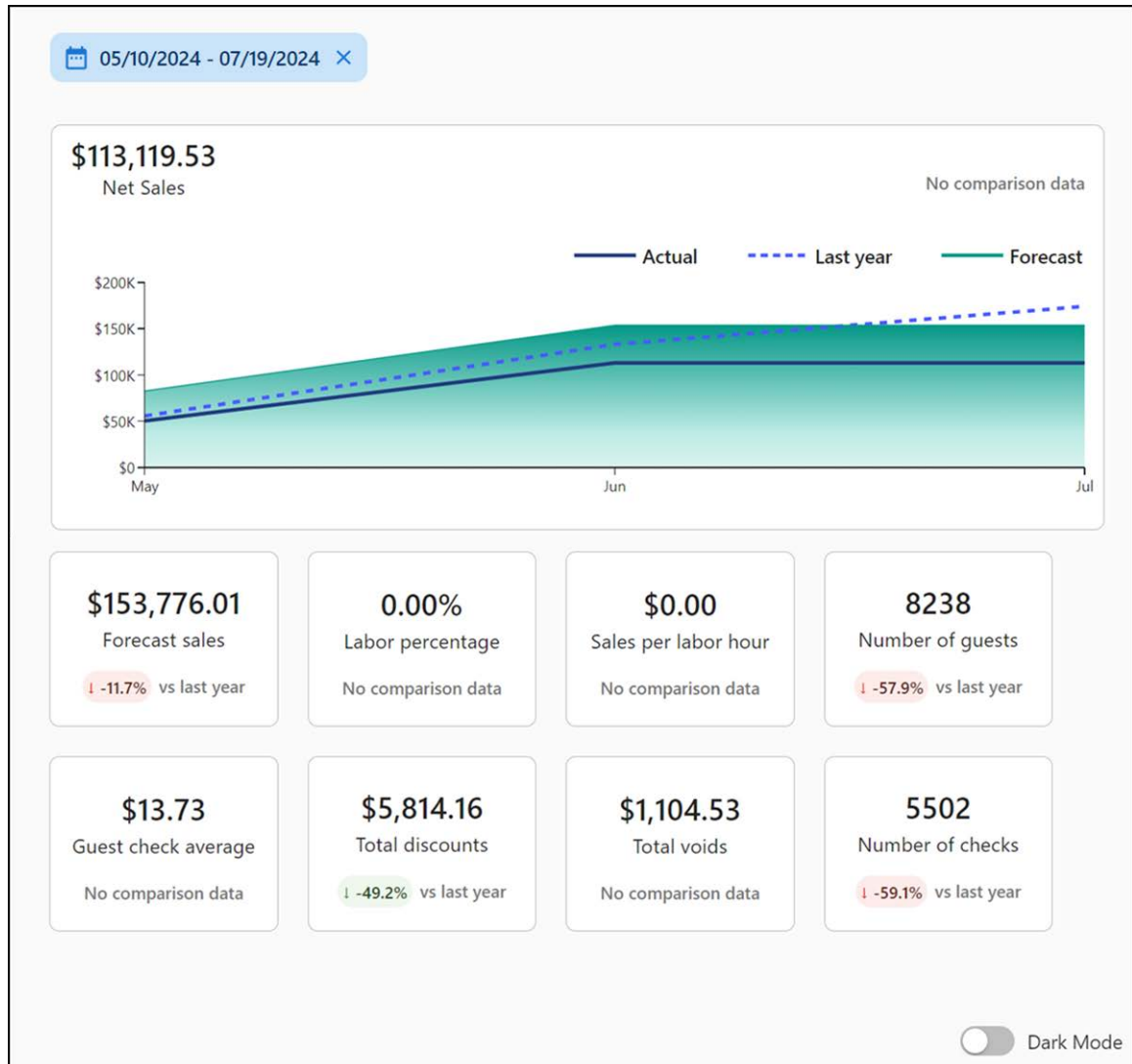


Switching apps

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

Working with the dashboard

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



ASM dashboard

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

Widget	Purpose
Forecast sales	View the sales forecast in detail. Note: This widget is not interactive in this release.
Labor percentage	View the labor percentage for the selected site. Select this widget to navigate to the 'Shift tracker' function.
Sales per labor hours	View the sales per labor hour for the selected site. Select this widget to navigate to the 'Shift tracker' function.
Number of guests	View the total number of guests who visited the store, for the selected period. Select this widget to navigate to the Sales summary report.
Guest check average	View the average amount of sales per guest check for the selected period. Note: This widget is not interactive in this release.
Total discounts	View the total number of discounts applied for the selected period. Select this widget to navigate to the ' Viewing transactions ' screen.
Total voids	View the total voided transactions for the selected period. Select this widget to navigate to the ' Viewing transactions ' screen.
Number of checks	View the total number of checks for the selected period. Select this widget to navigate to the ' Viewing transactions ' screen.

Changing the date to report

The dashboard displays data for the previous day, by default; however, you can switch to another date or select multiple dates to appear.

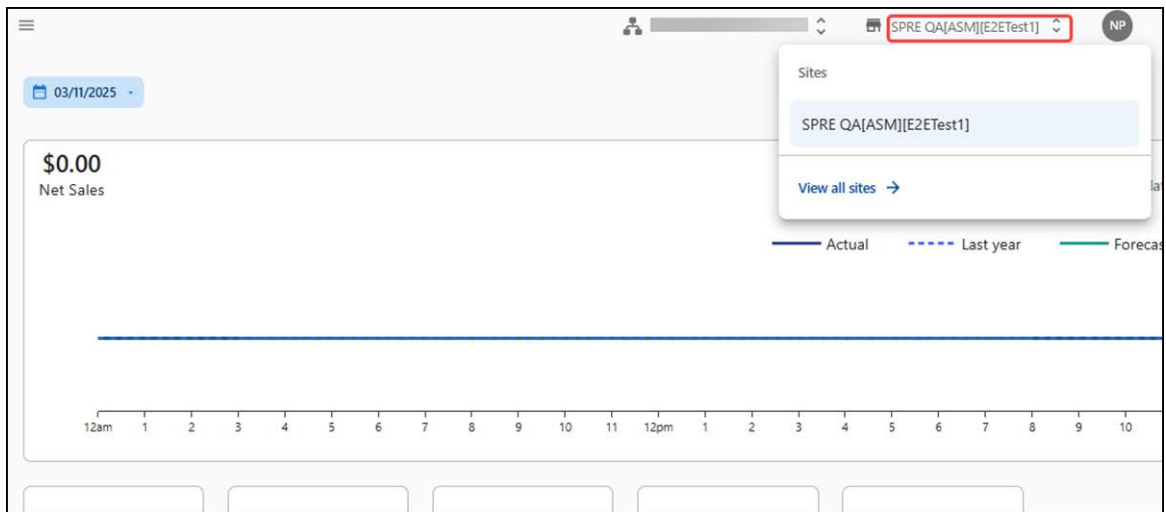
To change the dates to view on the dashboard:

1. With the dashboard active on the screen, select the **start** and **end dates to view**. Alternatively, you can select the start and end dates from the predefined date range picker (Yesterday, Last 7 days, Last 14 days, Last 30 days, and Last 90 days) to generate data for the corresponding number of days.
2. Click **Done**. The screen refreshes to reflect the data for the selected dates.

Changing the site

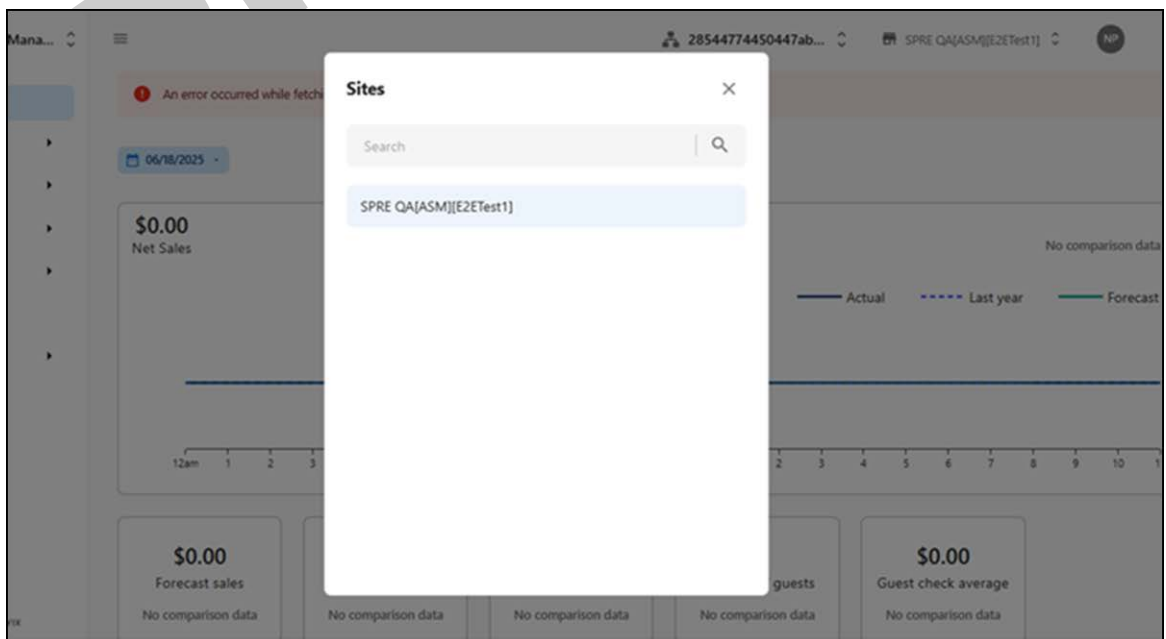
The dashboard displays the default site assigned to you. If you use a multi-store account, you can easily switch from one site to another to view data and perform tasks within that site.

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



Switching between sites

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

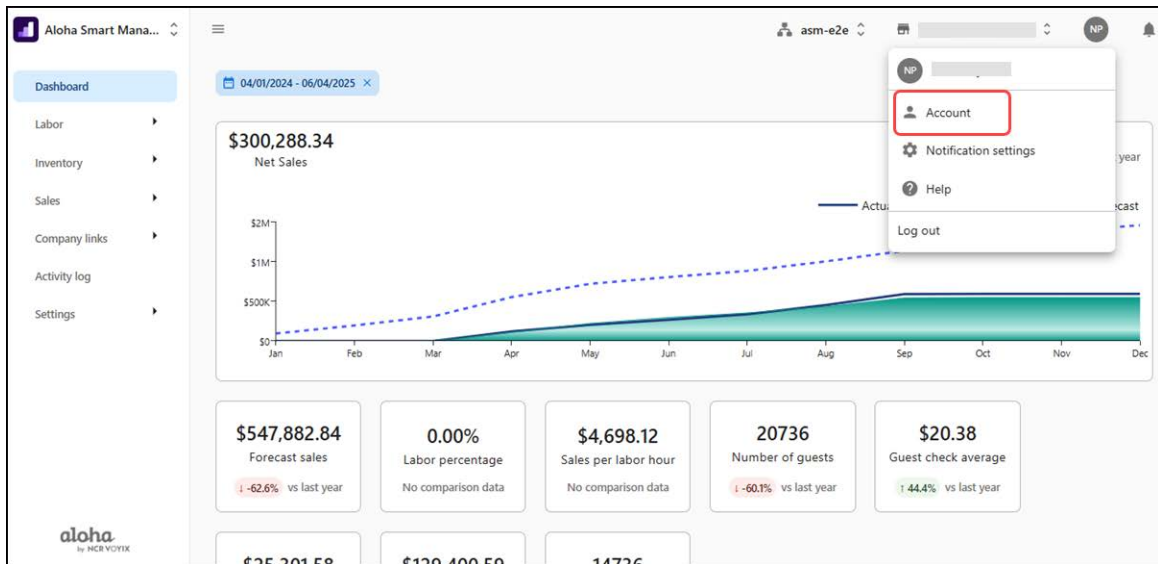


Selecting sites

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

Working with your account

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



ASM profile icon and menu

Establishing your account profile, preferences, and login credentials

When your account was first created in ASM, if you were designated as an above-store employee, you were redirected to NCR Identity from the Welcome email to complete the creation of your user profile. This information is available for edit when you select Account from the menu that appears when you click your profile icon.

Note

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

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

The screenshot displays the 'Profile' page of the NCR VOYIX Account. On the left, a sidebar contains three menu items: 'Profile' (selected), 'Preferences', and 'Security'. The main content area is titled 'Profile' and includes the instruction 'Update and manage your personal details in one place.' There are three main sections for editing profile information: 'Basic info', 'Email', and 'Address'. Each section has a pencil icon in the top right corner for editing. The 'Basic info' section contains fields for 'First name' (NCR), 'Last name' (Admin), 'Date of birth', and 'Phone number'. The 'Email' section contains an 'Email' field with the value 'ncr.cbo.eng.qe.adm+admin@gmail.com' and a 'Change email' button. The 'Address' section contains fields for 'Address' and 'County'.

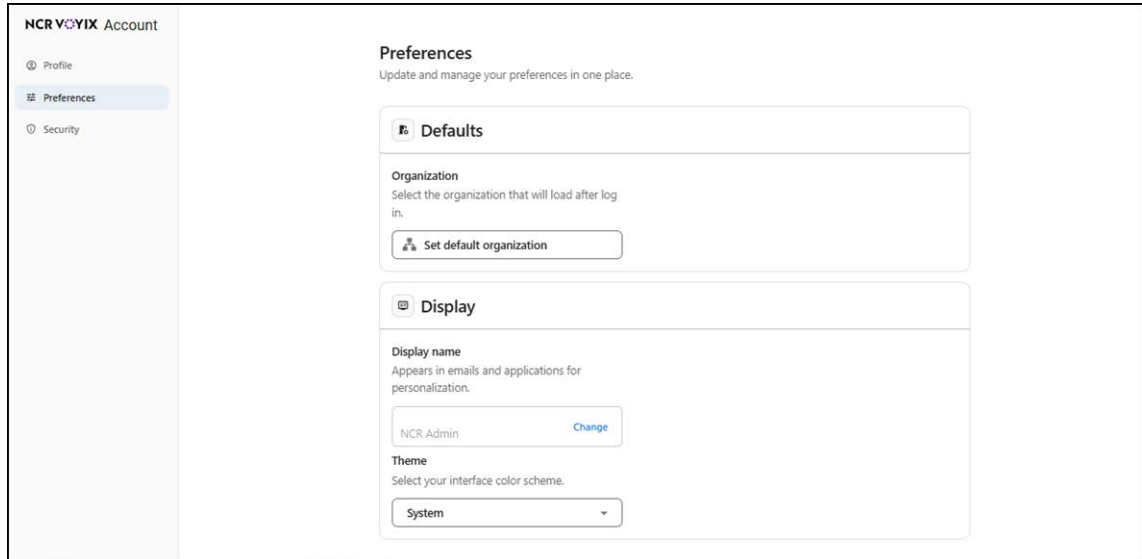
Edit the Profile page

To update your account profile:

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

To update your account preferences:

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



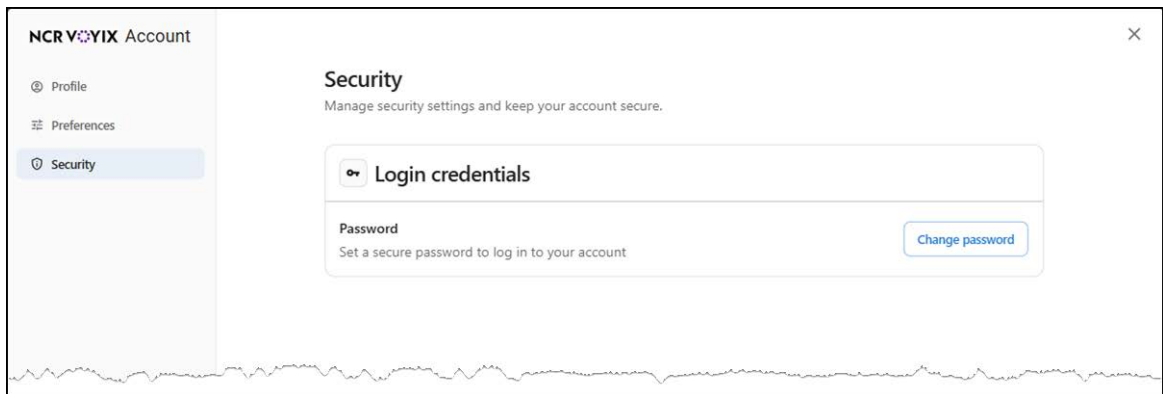
Edit the Preferences page

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

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

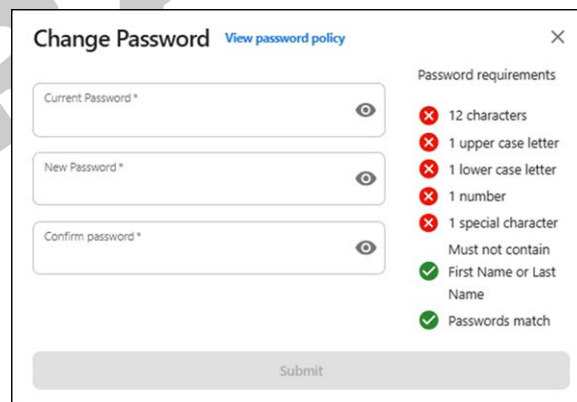
To update the password to use when logging in to ASM:

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



Edit the Security page

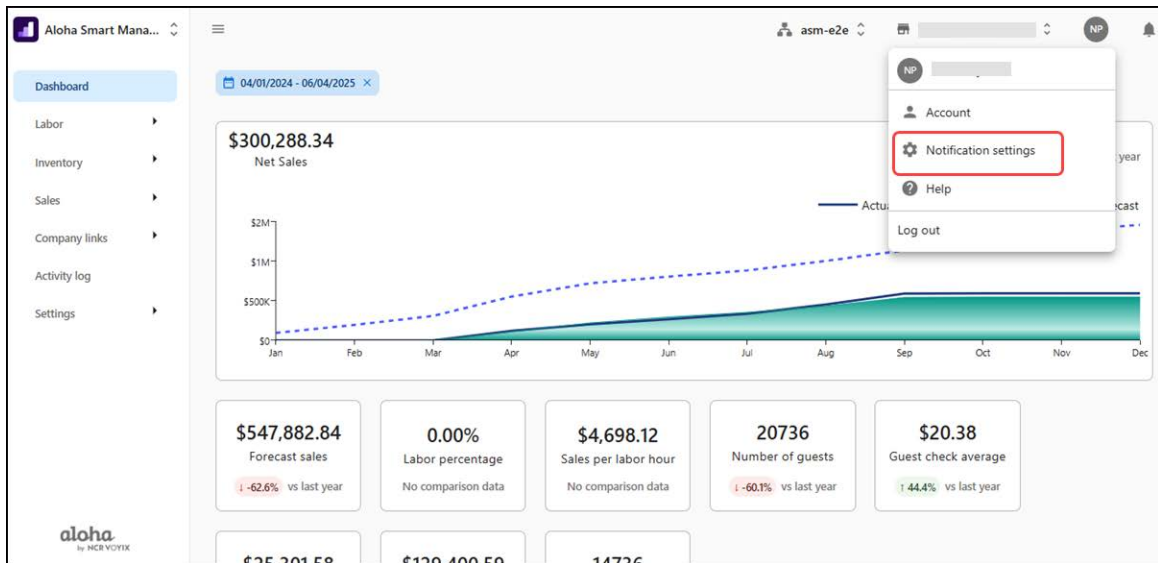
2. Under the Login credentials group bar, click **Change password** to display the Change Password screen.



Change Password screen

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

Configuring and using notification settings



'Notification settings'

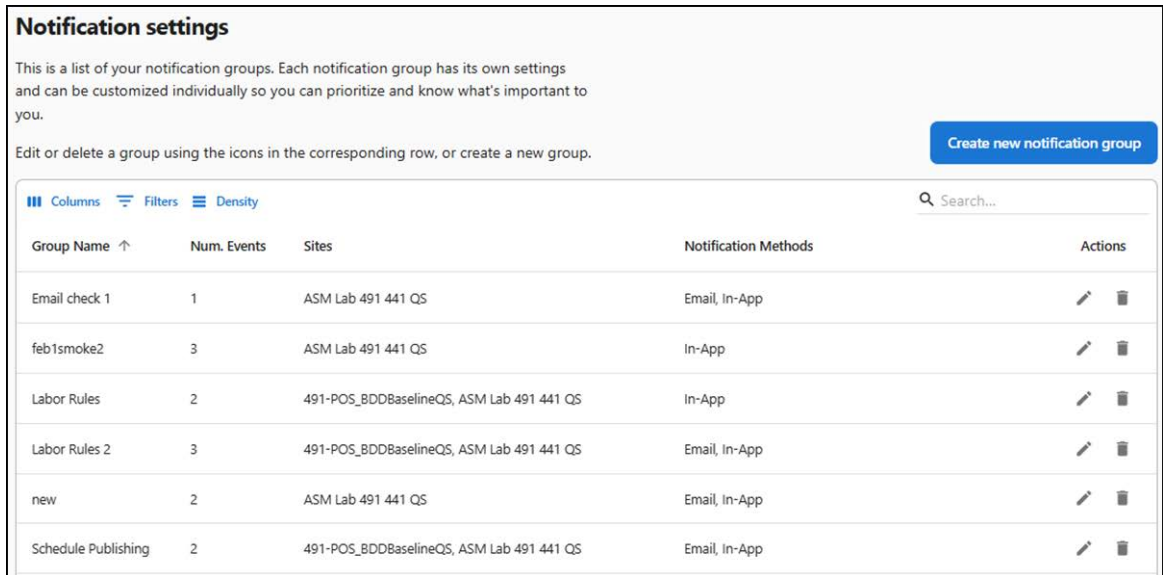
Use 'Notification settings' to create general site notifications that appear to all users at login during the designated time frame. A notification group allows you expedite messages of upcoming events and announcements to select employees without directly interacting with the recipients. Each notification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

Examples of how you can use a notification are:

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

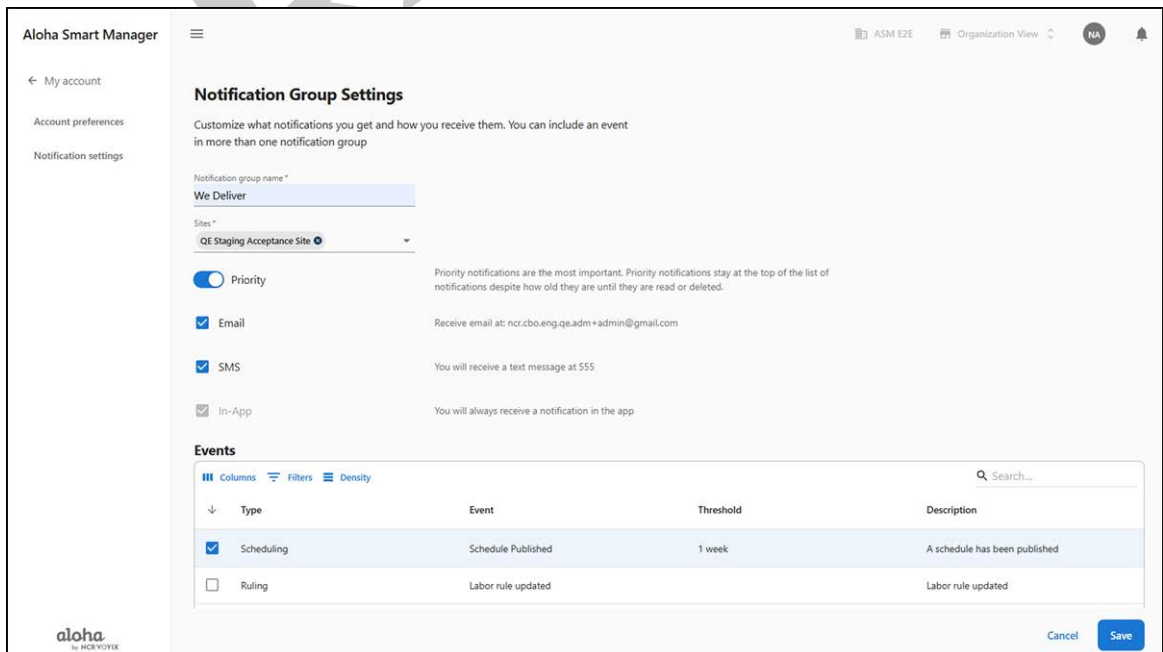
Configuring notification groups

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



'Notification settings' screen

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



'Notification Group Settings' screen

3. Type a **name** for the notification group.
4. Select the **sites** to include in the notification group. Only the sites to which you have access are available for selection.
5. Toggle **Priority** to on to set a high priority for the events within the notification group. A high priority event appears at the top of the notification list until it is read or deleted. Toggle **Priority** to off to set a normal priority for the events within the notification group.
6. Select **Email** to send the notification by email. The system defaults to the email address of the person who is logged in to Aloha Smart Manager.
7. Select **SMS** to send the notification by short message service (SMS). The system defaults to the phone number configured in the 'Account preferences' screen.

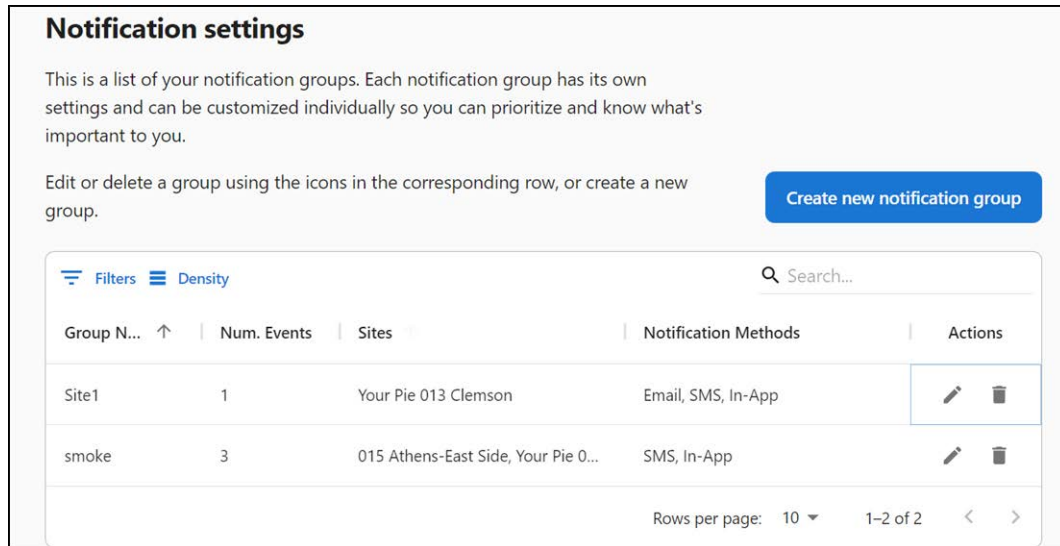
 **Tip**

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

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

To edit or delete a notification group:

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



'Notification settings' screen

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

Viewing a notification sent to you

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

An in-app notification contains the following:

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

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

Mark read — Indicates the notification is read without opening.

Mark unread — Indicates the notification is not read.

Delete — Deletes the notification.

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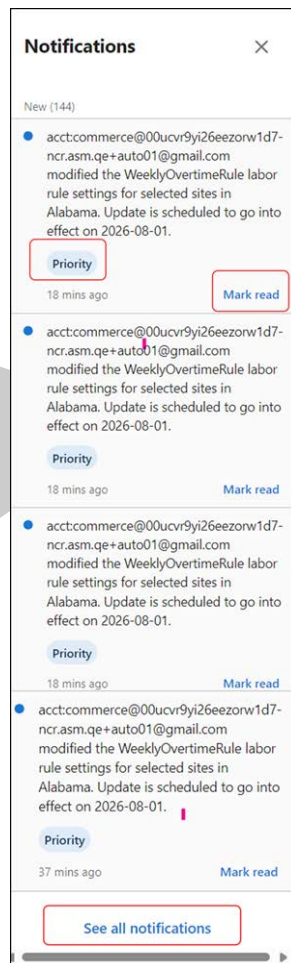
To view a notification:

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



Notifications Icon

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



Notifications Drawer

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

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

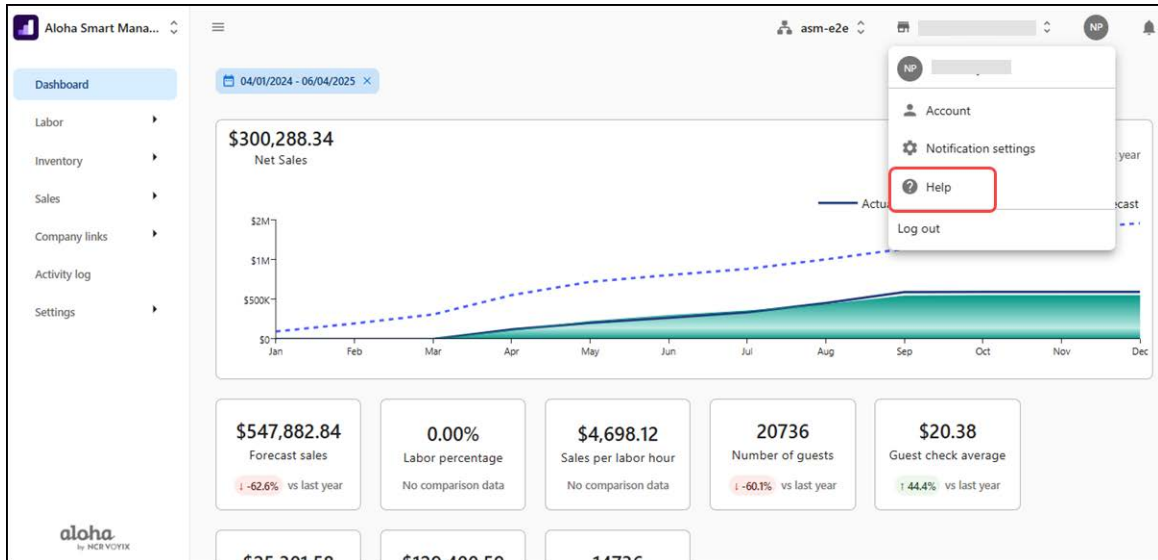


All notifications

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

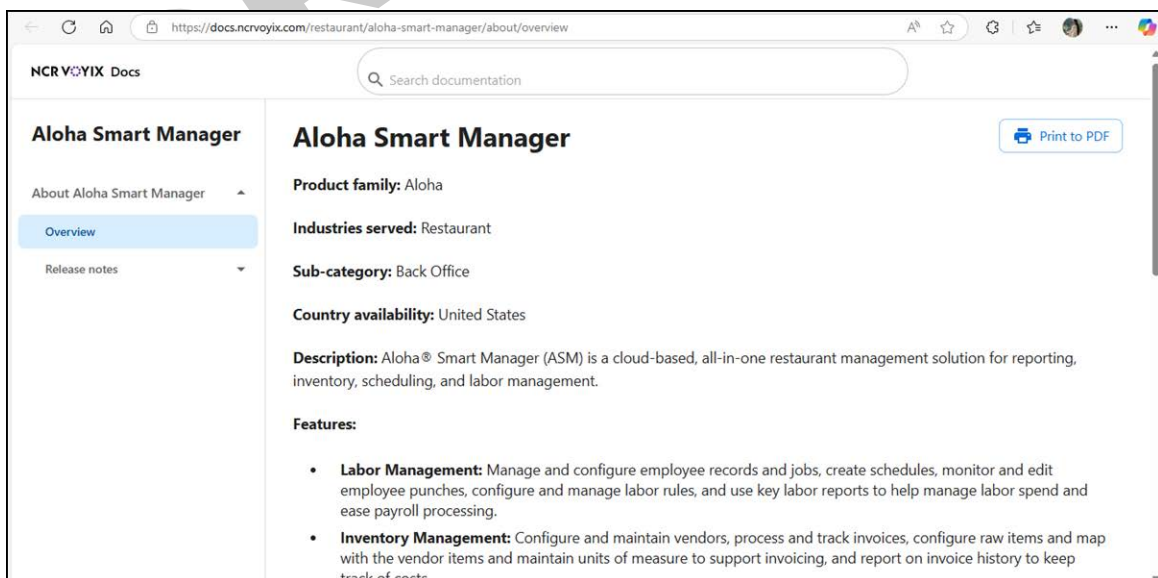
Accessing Help

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



Navigating help feature

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



Docs portal home page

About labor 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.

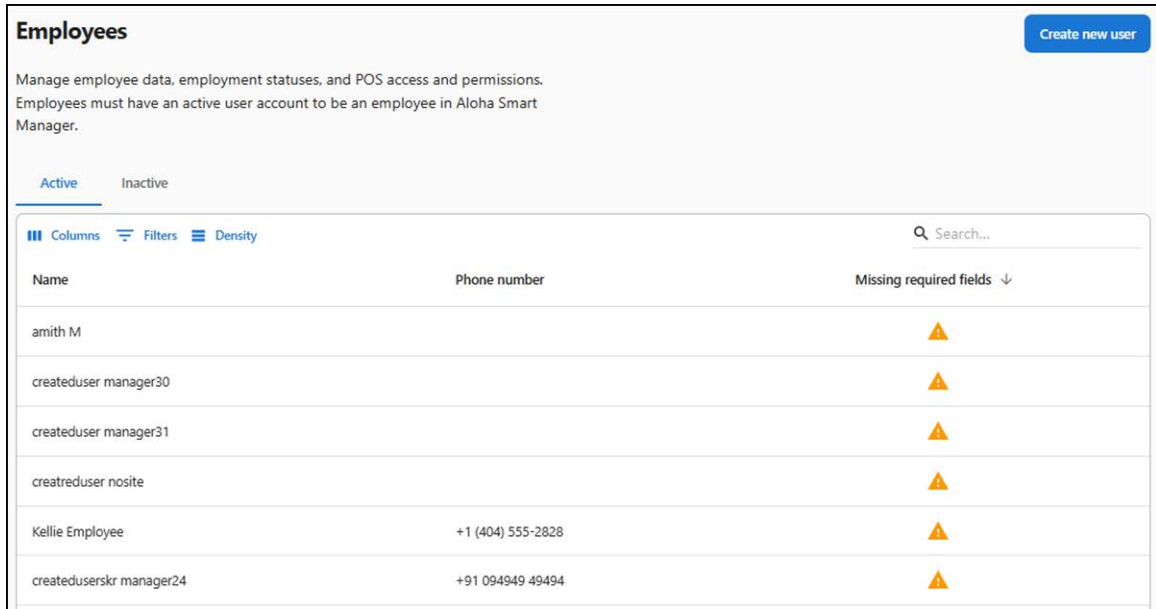
Some key areas of the Labor module are:

- [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.

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.

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

'Employees' screen

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

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

The screenshot shows the 'Create User' interface. At the top, there is a blue informational banner: 'In order for users to gain full functionality in applications please assign permissions and location access.' Below this is the 'Basic information' section, which is expanded. It includes a note: '* Indicates required fields'. The fields are: 'First name *' (text input), 'Last name *' (text input), 'Email *' (text input with 'name@domain.com'), 'Date of birth' (calendar icon, MM/DD/YYYY), and 'Phone number' (text input with '123-456-7890'). Below the Basic information section are four collapsed sections: 'Permissions', 'Location access', 'Local device login', and 'Address'. At the bottom right, there are 'Cancel' and 'Create user' buttons.

'Create User' screen in NCR Identity

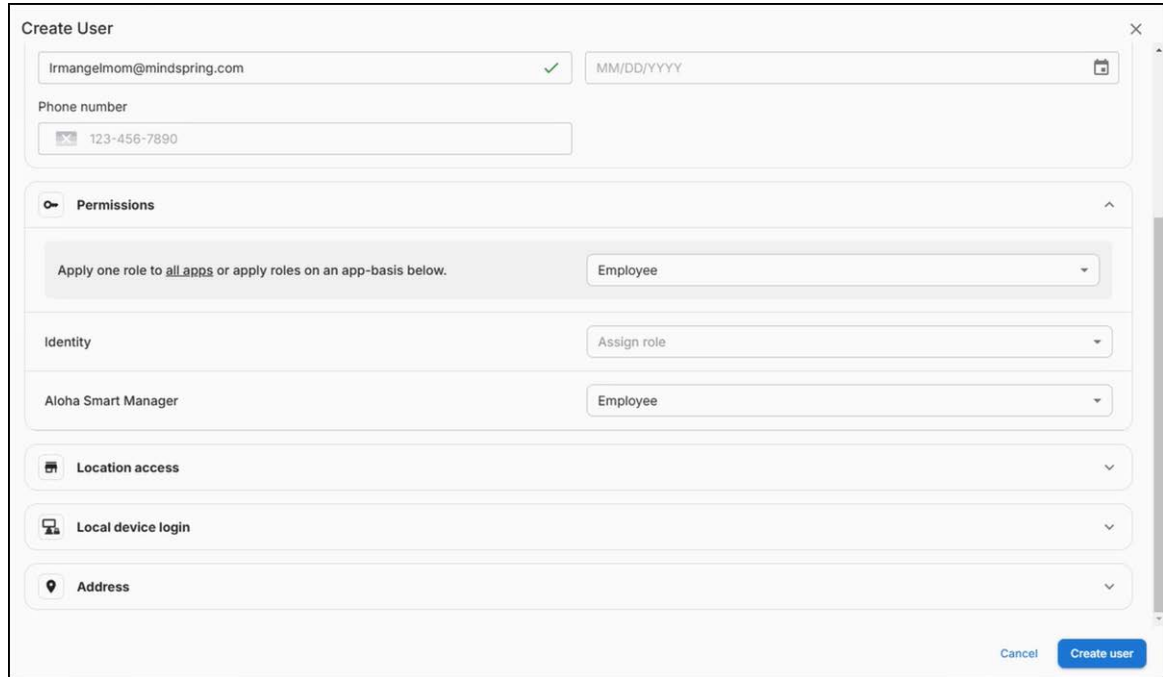


Reference

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

5. Type the **first and last name** of the new employee.
6. Type a valid **email address** for the new employee. ASM uses this email address to send a welcome email to the employee.
7. If the employee you are adding is an in-store employee only and does not require access to ASM for any reason, continue to **step 10** to establish the PIN the employee is to use when logging in to the POS; otherwise, continue to the **next step**.

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



'Permissions' screen

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

Note

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

Important

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

10. Expand **Location access**.

The screenshot shows a 'Create User' dialog box with the following details:

- Identity:** Aloha Smart Manager
- Assign role:** Employee
- Location access:** Expanded section showing '1 site selected'. A search bar is present. The list contains:
 - 491-POS_BDDBaselineQS (f98de8e47531412a80b4c380e5e64d48)
 - ASM Lab 491 441 QS (63fe3c19fe8a461eba3f7e9fbc9a8f04)
- Local device login:** Unchecked
- Address:** Unchecked
- Buttons:** Cancel and Create user

'Location access' screen

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

12. Expand **Local device login**.

The screenshot shows the 'Create User' form with several sections: 'Basic information', 'Permissions', 'Location access', 'Local device login', and 'Address'. The 'Local device login' section is expanded, and a text input field labeled 'Device login' contains the number '14789'. A green checkmark is visible in the bottom right corner of the input field, indicating the PIN is valid. At the bottom right of the form, there are 'Cancel' and 'Create user' buttons.

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.

The screenshot shows the 'Users' management page. A green success message at the top right states: 'User Laurie Davis has been successfully created. Click [here](#) to manage this user.' Below the message is a 'Create new user' button. The main area displays a table of users with columns for Email, First Name, Last Name, Status, and Actions. The table contains 12 rows of user data.

Email	First Name	Last Name	Status	Actions
ab185578@ncr.com	Anisha	Bhogale	Active	⋮
ad185198@ncr.com	Alex	Dyrbusch-Steenbergh	Active	⋮
am185235@ncr.com	Angie	Morse	Active	⋮
angiemorse+multi@gmail.com	Angie	Mose	Active	⋮
angiemorse+MultiMgr@gmail.com	Angie	Morse	Active	⋮
ap185209@ncr.com	Alex	Popu	Active	⋮
bg185133@ncr.com	Belinda	Goodman	Active	⋮
bh185088@ncr.com	Brad	Hudson	Active	⋮
bl185052@ncr.com	Ben	Lincoln	Active	⋮
bm185264@ncr.com	Benjamin	McKinley	Active	⋮

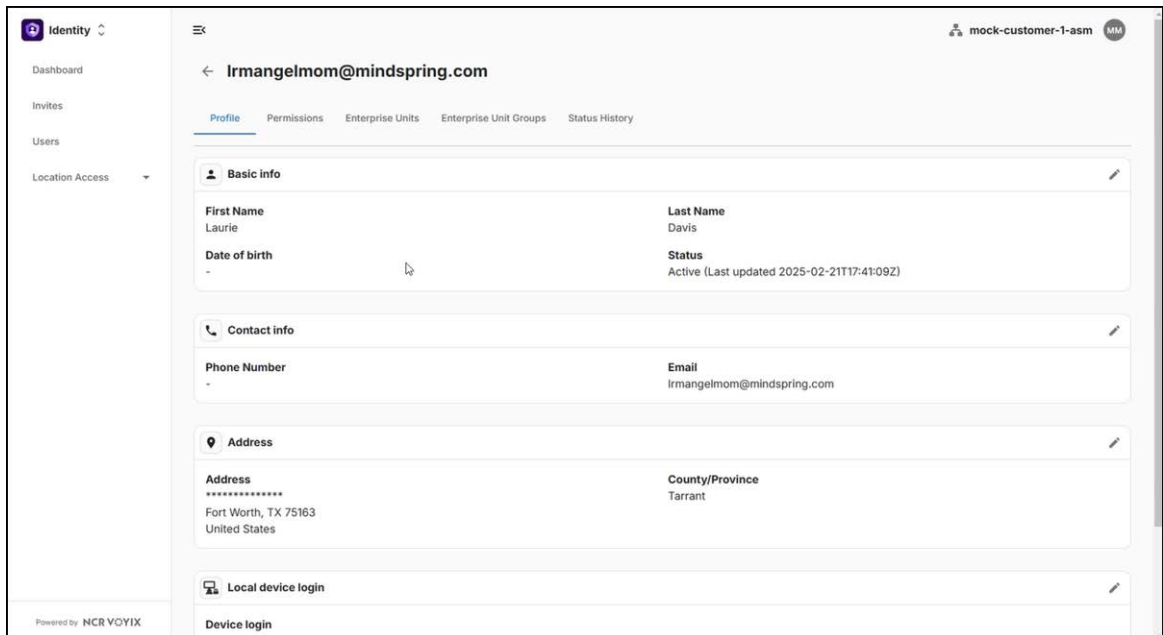
'Create user' success message



Note

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

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



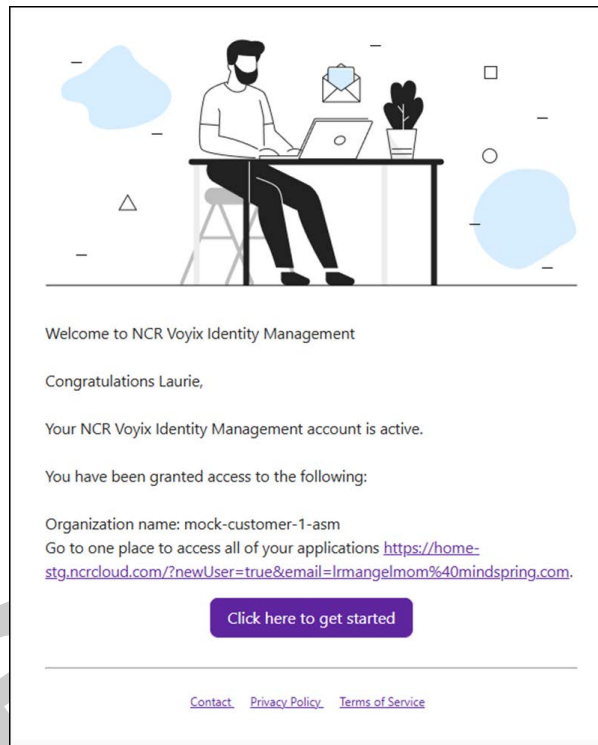
Employee information summary screen

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

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

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

1. Open the **Welcome email**.



Welcome email

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

Step 3: Assigning a job to a new employee.

The hiring manager must assign at least one job to the employee before they can be placed on a schedule. Once this occurs, their status changes to hired.

To assign a job to an employee:

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

Employees Create new user

Manage employee data, employment statuses, and POS access and permissions.
Employees must have an active user account to be an employee in Aloha Smart Manager.

Active Inactive


Columns Filters Density Search...


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


'Employees' screen

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


Employees / Prafulla Nayak

Prafulla Nayak  [Manage user](#)


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

Basic Information 


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

Status 


User status	Effective date
PENDING	-
Employment reason	-

Contact Information 


Phone number	Email address
-	pn185114@ncr.com

Address 

-

Local device login 

Device username
-

Certifications 

Certificate name	Certificate number
-	-
Certificate expiration	-

Employee profile screen

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

Employees / Prafulla Nayak

Prafulla Nayak Manage user

Profile **Jobs** ▲

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

Employee type

Employee type

Active jobs Add job

Filters Density Search...

Job	Pay rate	Effective date	Performance rating	Actions
No rows				

Rows per page: 10 0-0 of 0 < >

Job history

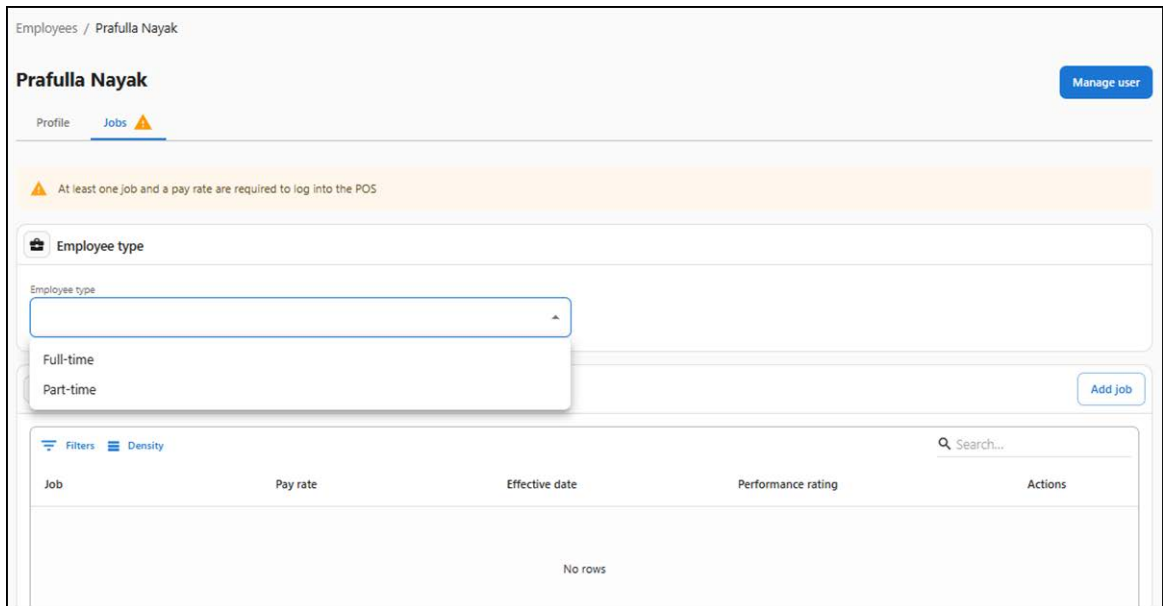
Columns Filters Density Search...

Job	Pay rate	Effective date	Modified date	Modified by
FOH Team Member	\$6.00	3/13/2025	3/13/2025	

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

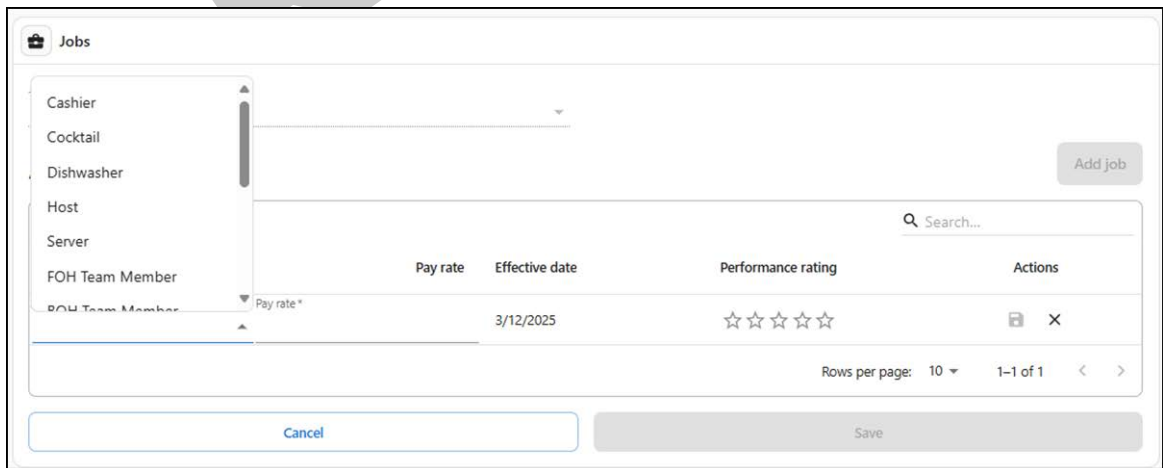
'Jobs' screen

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



Employee 'job type'

4. Select the **Employee type** from the drop-down list. Choose from Full-time, Part-time. A message confirming the employee type selection appears and automatically dismisses.
5. Click **Add job**.

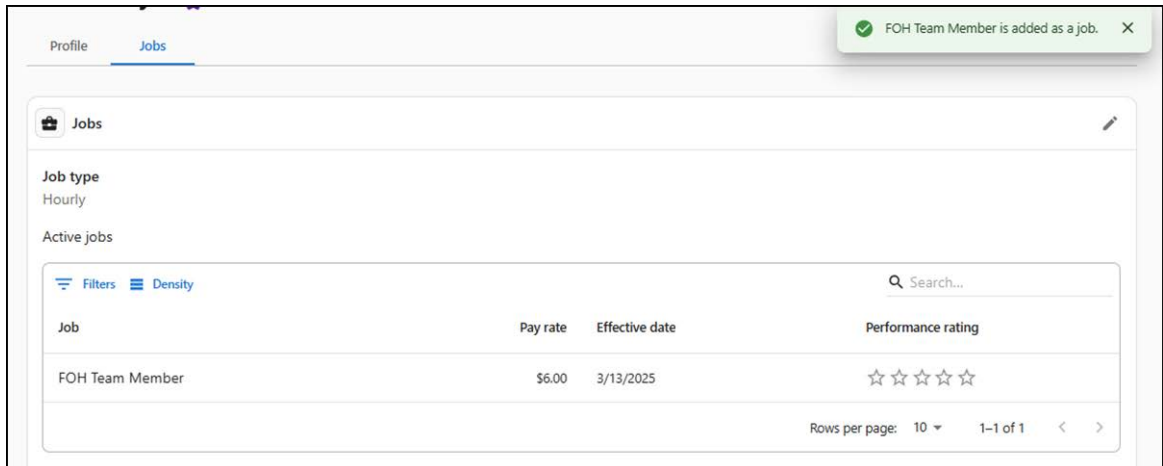


Employee 'Add job'

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

6. Select a **job** to assign the employee from the drop-down list.
7. Type the **Pay rate** the employee will receive when logged in under that job.

8. Select a **Performance rating**, if required, and click **Save** icon in **Actions**. You cannot change the **Effective date** for an employee.
9. 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

10. Select the **Profile** tab again after adding the job. The **User status** changes to 'Active' and the caution symbol is no longer visible.
11. 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.

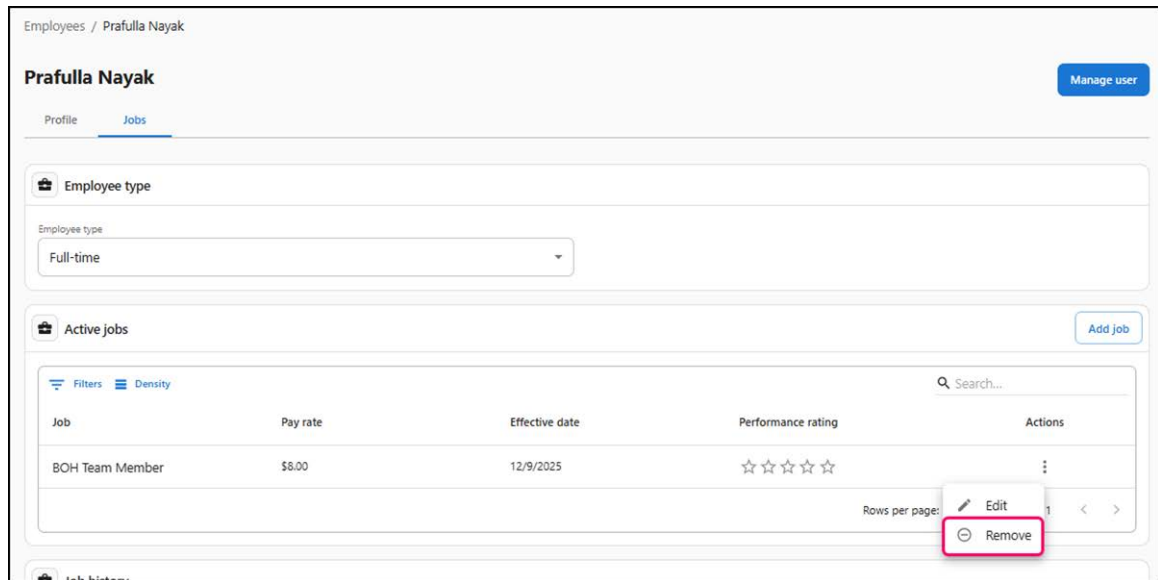
Removing a job from an employee

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:

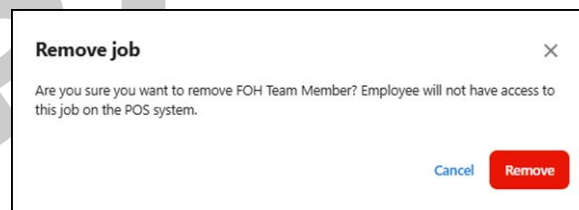
1. Select **Labor > Employees**. The 'Employees' screen appears.
2. Select the **employee** in the Active tab. The employee profile screen appears.

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



'Jobs' screen

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



Remove job window

5. Click **Remove** to confirm.

Note


Use the **Edit** option to update the pay rate as needed and click **Save** icon in **Actions**.


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.


Employees / Prafulla Nayak

Prafulla Nayak  [Manage user](#)


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

Basic Information 


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

Status 


User status PENDING	Effective date -
Employment reason -	

Contact Information 


Phone number -	Email address pn185114@ncr.com
-------------------	-----------------------------------

Address 

-

Local device login 

Device username -

Certifications 

Certificate name -	Certificate number -
Certificate expiration -	

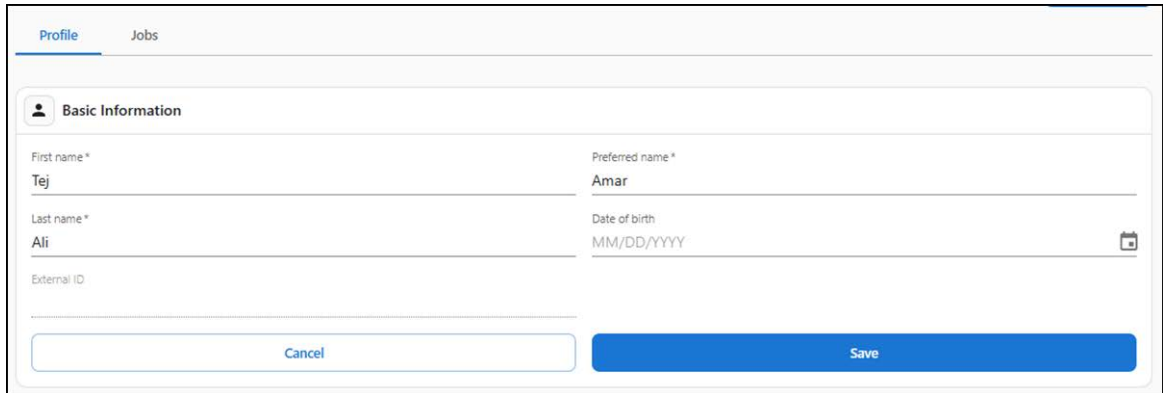
Employee profile screen

 **Note**

The **Manage User** option in the top-right corner allows you to manage users. Selecting this option will leave **Aloha Smart Manager** and redirect you to the **NCR Identity** application.

To view and edit the employee profile:

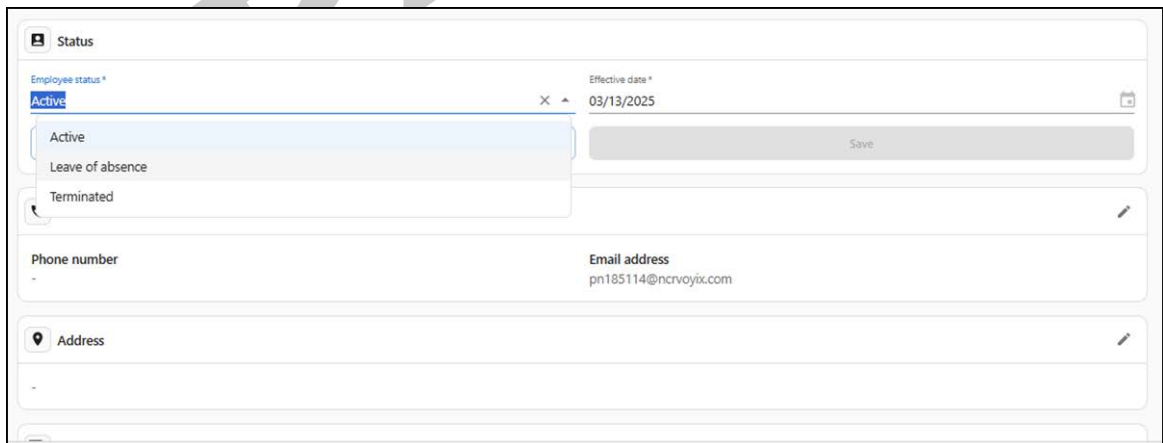
1. Select **Labor > Employees**. The 'Employees' screen appears.
2. Select the **employee** from the list. The employee profile screen appears.
3. Click the **pencil icon** at the right end of the **Basic information** group bar.



The screenshot shows the 'Profile' tab of an employee's record. Under the 'Basic Information' group bar, there are four input fields: 'First name*' with the value 'Tej', 'Preferred name*' with the value 'Amar', 'Last name*' with the value 'Ali', and 'Date of birth' with a calendar icon and the format 'MM/DD/YYYY'. An 'External ID' field is also present but empty. At the bottom of the form are 'Cancel' and 'Save' buttons.

Employee basic information

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

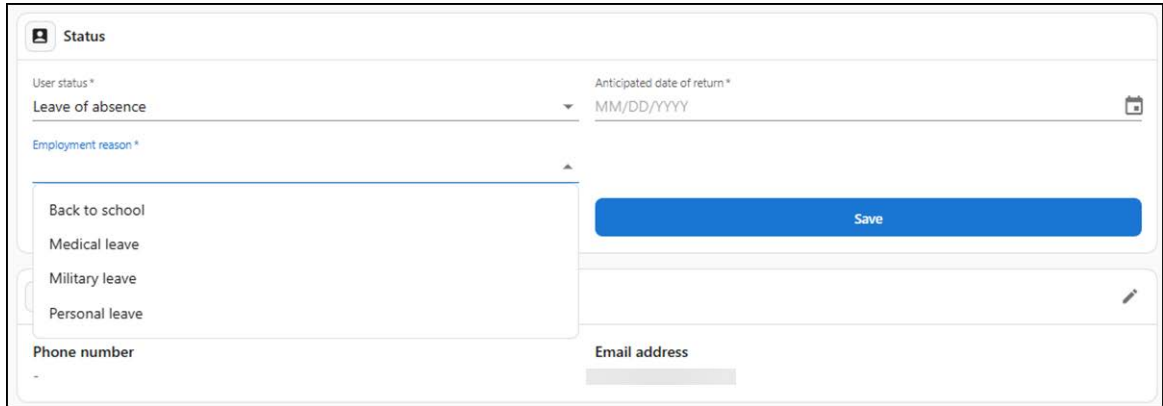


The screenshot shows the 'Status' tab of an employee's record. The 'Employee status*' dropdown menu is open, showing options: 'Active', 'Leave of absence', and 'Terminated'. The 'Effective date*' is set to '03/13/2025'. Below the status dropdown are fields for 'Phone number' (empty), 'Email address' (pn185114@ncrvoyix.com), and 'Address' (empty). A 'Save' button is visible to the right of the status dropdown.

Employee status

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

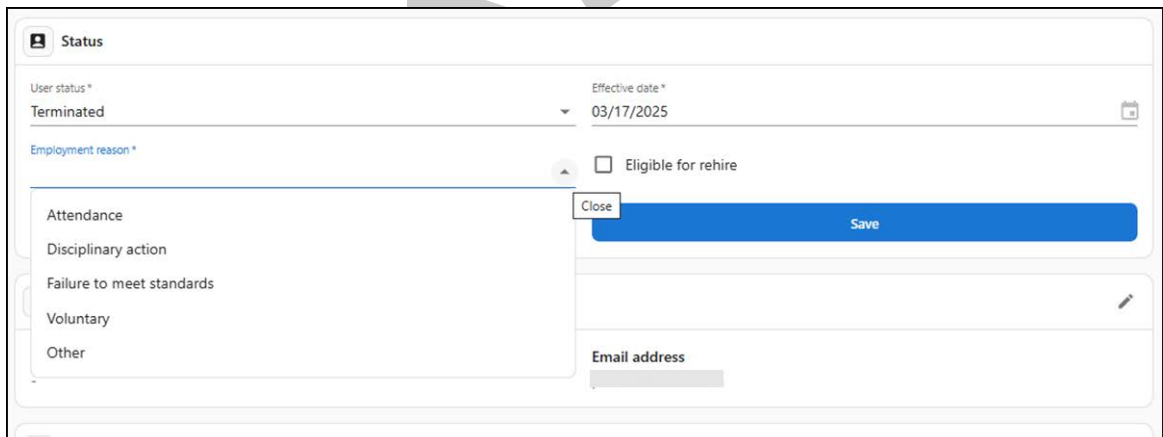
8. Select **Active** to indicate the employee is available for scheduling. 'Active' is the default status for active employees. You cannot change the 'Effective date' for employees if the User Status is Active.



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

Employee reasons for leave

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

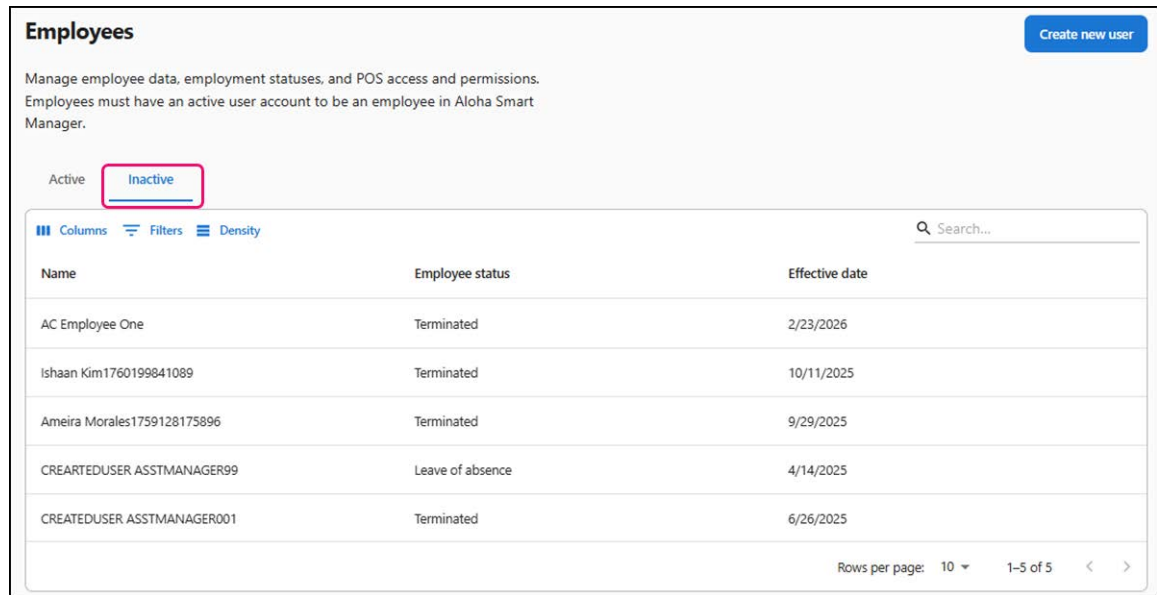


The screenshot shows the 'Status' form in the Aloha Smart Manager interface. The 'User status' dropdown is set to 'Terminated'. The 'Effective date' field is set to '03/17/2025'. The 'Employment reason' dropdown is open, showing a list of options: 'Attendance', 'Disciplinary action', 'Failure to meet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

Employee termination

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

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



Employees Create new user

Manage employee data, employment statuses, and POS access and permissions.
Employees must have an active user account to be an employee in Aloha Smart Manager.

Active **Inactive**

Columns Filters Density Search...

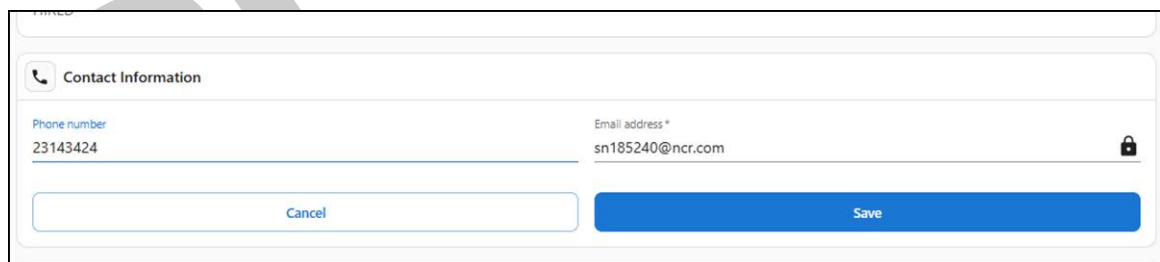
Name	Employee status	Effective date
AC Employee One	Terminated	2/23/2026
Ishaan Kim1760199841089	Terminated	10/11/2025
Ameira Morales1759128175896	Terminated	9/29/2025
CREATEDUSER ASSTMANAGER99	Leave of absence	4/14/2025
CREATEDUSER ASSTMANAGER001	Terminated	6/26/2025

Rows per page: 10 1-5 of 5

Employee list - Inactive tab

Note

Employees with a **Terminated** or **Leave of absence** status appear in the **Inactive** tab on the Employees page. Select **Labor > Employees > Inactive** tab to view the list.



Contact Information

Phone number: 23143424

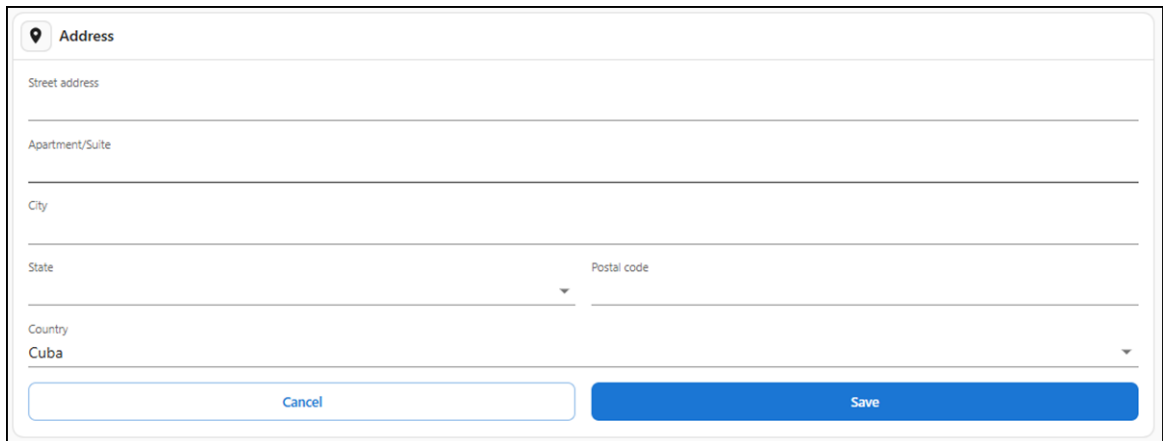
Email address*: sn185240@ncr.com

Cancel Save

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.

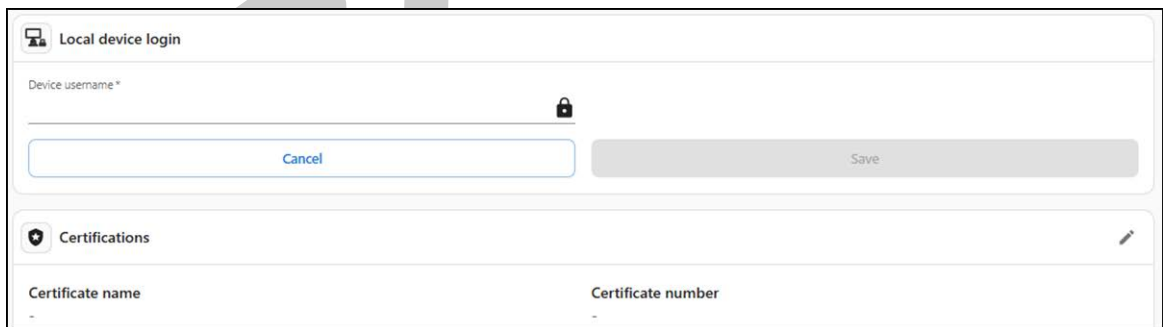
12. Click **Save**.



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

Employee address

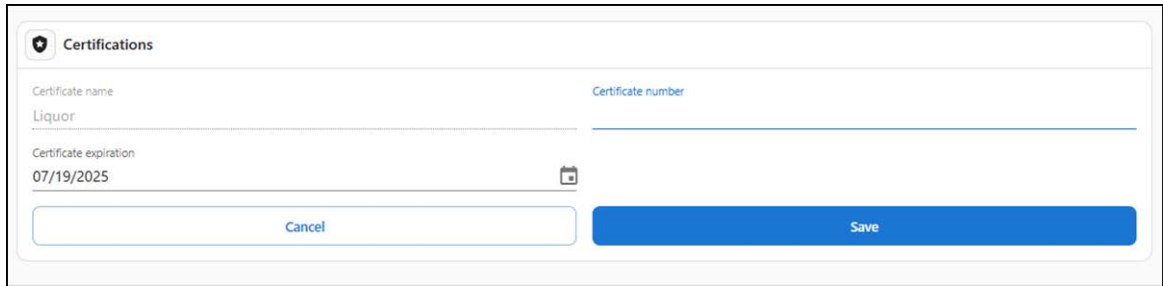
13. Click the **pencil icon** at the right end of the **Address** group bar to edit or change the address of the employee.
14. Type your **Street address**, **Apartment/Suite**, **City**, and **Postal code**.
15. Select the **State** and **Country** from the drop-down list.
16. Click **Save**.



The screenshot shows two sections. The top section is titled "Local device login" and contains a "Device username*" input field with a lock icon to its right. Below this field are "Cancel" and "Save" buttons. The bottom section is titled "Certifications" and contains a table with two columns: "Certificate name" and "Certificate number".

Employee local device login

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



The screenshot shows a form titled "Certifications" with a pencil icon in the top left corner. The form has two columns of input fields. The left column contains "Certificate name" with the value "Liquor" and "Certificate expiration" with the value "07/19/2025" and a calendar icon. The right column contains "Certificate number" with an empty input field. At the bottom of the form are two buttons: "Cancel" and "Save".

Employee certifications

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

DRAFT

Working with schedules

Use Schedule to create schedules for employees to work for the current and future weeks, depending on business requirements. You can create, edit, and delete employee schedules to ensure the optimal utilization of resources and gain maximum productivity with ease.

The schedule is a calendar-based user interface that helps you view schedules of all employees within a single screen and allows you to schedule and view shifts for a specific day or multiple days of a week. The list of active employees appears under the 'Name' column and the total number of hours worked for the current week for that employee appears under the 'Total' column. For example, in certain jurisdictions, the organization must schedule shifts up to 14 days in advance. This helps you know which employees are assigned to a shift and their working hours.

Understanding the 'Schedule' screen

The following image and table describe the 'Schedule' screen:

Schedule Publish (1)

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

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

+ Add announcement

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

Summary data Refresh

		Fri 04	Sat 05	Sun 06	Mon 07	Tue 08	Wed 09	Thu 10
Historic sales average	\$3,504,997	\$3,502,302	\$5	\$38	\$644	\$595	\$982	\$429
Scheduled hours	148.50 hr	21.75 hr	34.50 hr	16.00 hr	38.25 hr	20.00 hr	17.00 hr	1.00 hr
Scheduled labor cost %	0.08 %	0.01 %	15629.00 %	881.02 %	114.65 %	56.03 %	26.30 %	2.38 %

'Schedule' screen

No	Description
Today	View the schedule for the current day (today).
Date picker	Navigate between weeks.
Calendar	Open the calendar control to select a week.
Employee	Select a specific employee to plan a schedule. You can scroll through the list of available employees who are assigned to the selected job or you type a specific employee name. Related Information: Ensure the manager has approved the employee record.
job	Select a job. Upon selection, the employees assigned to the corresponding job appear in the schedule viewer. Related Information: Ensure the jobs are already defined in the 'jobs configuration' screen.
Add announcement	Add an announcement to a schedule. Example 'Desert contest this week.'
Schedule viewer	Schedule viewer (calendar view of a specific week). The calendar view lists the following details: <ul style="list-style-type: none"> • Name of the employee for whom the shift is scheduled. • Total number of hours the employee has worked for the selected week. For example, if the employee's scheduled hours are approaching or exceeding overtime limits, the corresponding hours are highlighted in red. Additionally, upon hovering over the warning icon, the <i>Review the employee for the following: Part-time critical</i> message appears. • Week for which the shift is planned.
Adding a shift	Hover-over the calendar to view the Add Shift option. Use this option to create new shifts. Related information: To understand how to create shifts, see Adding a shift .
Cell in the Schedule table	Indicates the shift and job currently assigned to the employee.
Summary data	View the summary information for the past six weeks under Historic sales average, Scheduled hours, and Scheduled labor cost %.
Publish	Publish the shift calendar to employees.

Selecting a schedule week

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

A manager 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 Publish (1)

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

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

Add announcement

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

Summary data Refresh

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

'Schedule' screen

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

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

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

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

Adding a shift

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

To add a shift:

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

Schedule Print Publish

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

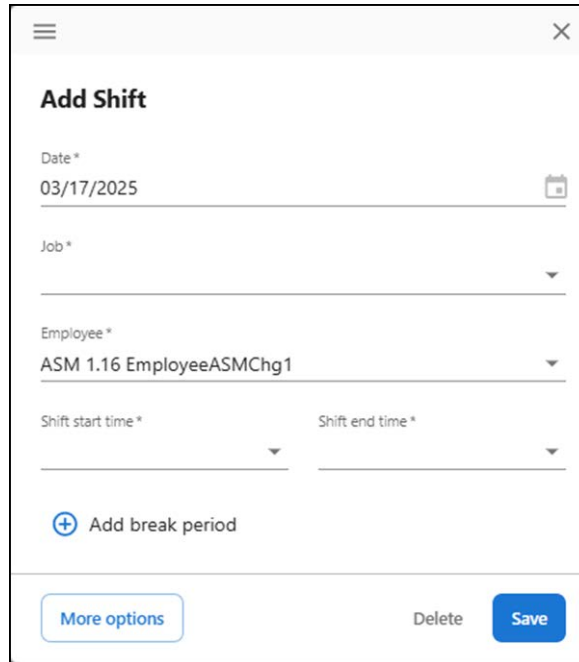
Today < 03/14/2025 - 03/20/2025 > Employee Job

+ Add announcement

Name	Total	Fri	Sat	Sun	Mon	Tue	Wed	Thu
aasdf fdsafds	0.00 hr	14	15	16	17	18	19	20
Ashok Adapa	28.00 hr				6:00a - 9:00p Manager		8:00a - 8:00p Manager	10:00a - 10:00p Manager
ASM 1.16 EmployeeASMC	12.75 hr	5:00p - 11:45p Bartender	4:00p - 10:00p Bartender		Add Shift			

'Schedule' adding shift

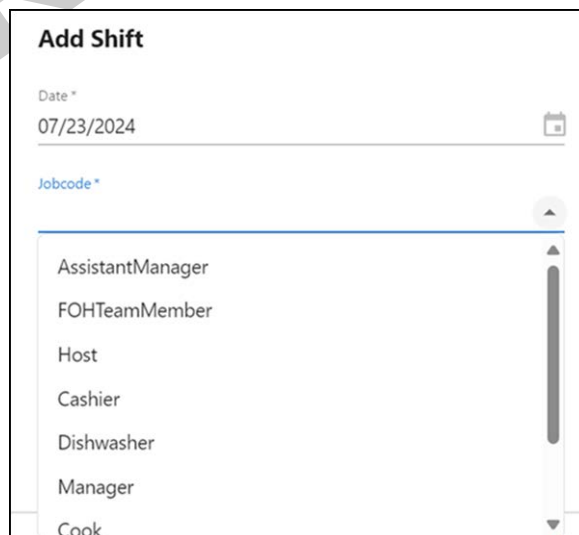
2. Locate the **employee in the list**, hover over the **date** to the right, and click **Add Shift**. The 'Add Shift' screen appears as a pop-out with the selected date.



The screenshot shows a mobile application interface for adding a shift. At the top, there is a title 'Add Shift' and a close button. Below the title, there are several input fields: 'Date *' with the value '03/17/2025' and a calendar icon; 'Job *' with a dropdown arrow; 'Employee *' with the value 'ASM 1.16 EmployeeASMChg1' and a dropdown arrow; 'Shift start time *' and 'Shift end time *' with dropdown arrows. Below these fields is a button with a plus sign and the text 'Add break period'. At the bottom of the form, there are three buttons: 'More options' (outlined), 'Delete', and 'Save' (solid blue).

'Add Shift' screen

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

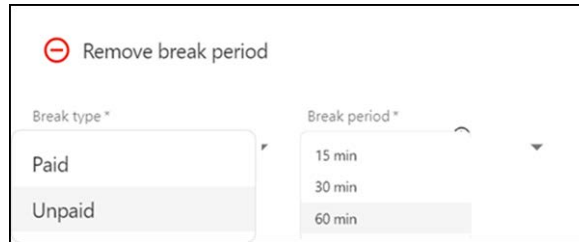


The screenshot shows the 'Add Shift' screen with the 'Jobcode *' dropdown menu open. The menu lists the following job roles: AssistantManager, FOHTeamMember, Host, Cashier, Dishwasher, Manager, and Cook. The 'Date *' field shows '07/23/2024'. The 'Jobcode *' field is highlighted in blue.

Job selection

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

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



The screenshot shows a dialog box titled "Remove break period" with a red minus icon. It contains two dropdown menus. The first is labeled "Break type *" and has "Paid" and "Unpaid" as options. The second is labeled "Break period *" and has "15 min", "30 min", and "60 min" as options.

Break type and period selection

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

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

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

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



Note

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

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

The screenshot shows the 'Schedule' interface. At the top, it says 'Last published 3/14/2025 by ph185071@ncr.com'. Below that are navigation buttons for 'Today', a date range '03/14/2025 - 03/20/2025', and dropdowns for 'Employee' and 'Job'. There is an 'Add announcement' button. The main part is a table with columns for days of the week (Fri 14, Sat 15, Sun 16, Mon 17, Tue 18, Wed 19, Thu 20) and rows for employees. A success message 'Shift detail added' is visible in the top right corner.

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

Success message

DRAFT

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

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

Add announcement

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

Summary data

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

'Schedule' screen

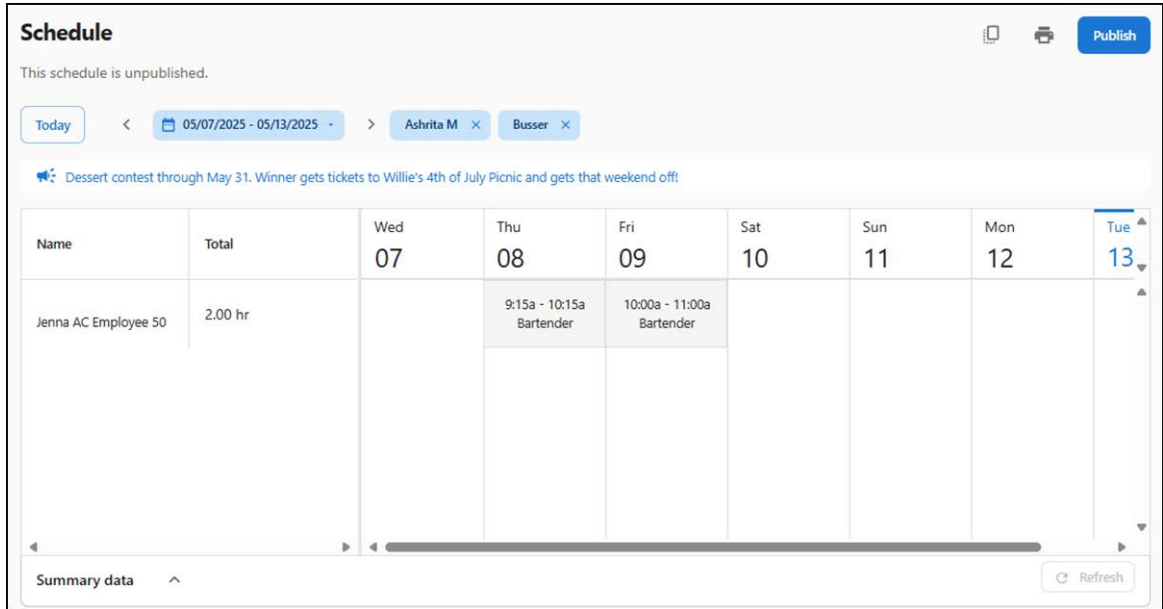
2. To display all shifts assigned to a job, select the **job** from the 'Job' drop-down list.
3. To display all shifts assigned to an employee, select the **employee** from the 'Employee' drop-down list.

Publishing a schedule

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

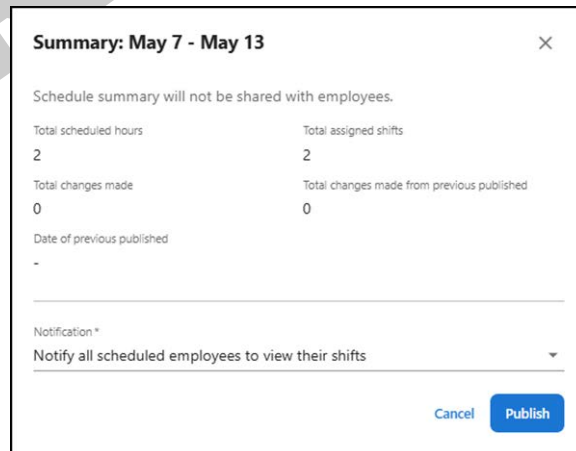
To publish a schedule:

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



'Publish' on Schedule screen

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



Publish summary message

3. Click **Publish**.

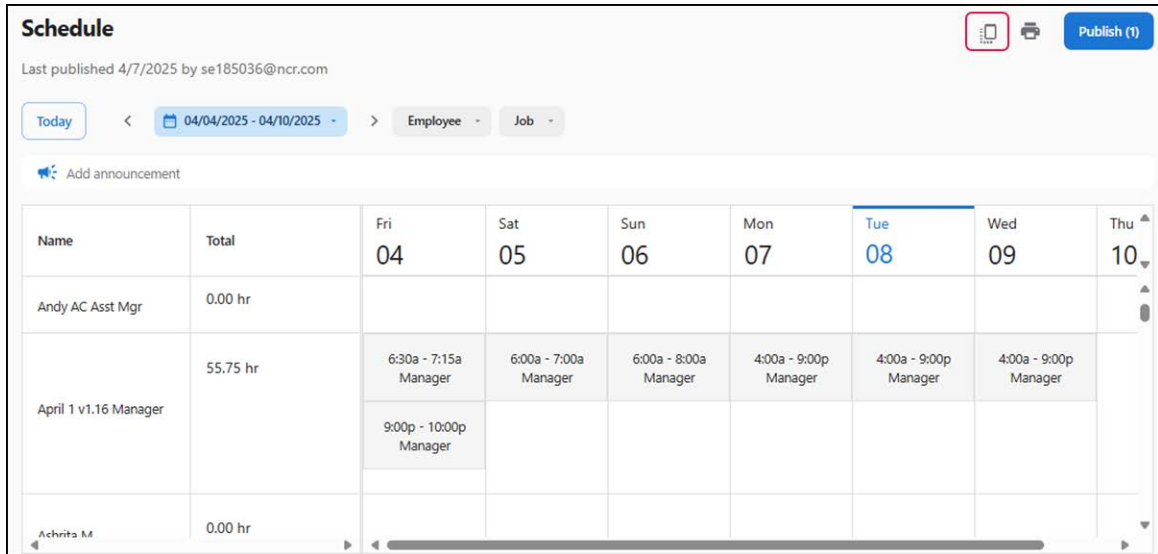
The screenshot shows the 'Schedule' interface. At the top, a green notification bar states: 'Schedule 5/7/2025 - 5/13/2025 has been published.' Below this, the page indicates 'Last published 5/13/2025 by Polisetty Pratyusha'. Navigation buttons include 'Today', a date range '05/07/2025 - 05/13/2025', and employee filters 'Ashrita M' and 'Busser'. A blue announcement reads: 'Dessert contest through May 31. Winner gets tickets to Willie's 4th of July Picnic and gets that weekend off!'. The main area is a grid with columns for days of the week (Wed 07 to Tue 13) and rows for employees. The row for 'Jenna AC Employee 50' shows a 'Total' of '2.00 hr' and specific shifts: '9:15a - 10:15a Bartender' on Thursday and '10:00a - 11:00a Bartender' on Friday. A 'Summary data' section is partially visible at the bottom left, and a 'Refresh' button is at the bottom right.

Schedule confirmation detail

A confirmation detail appears on the page publishing the schedule.

Copying a schedule

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



Schedule 📄 🖨️ Publish (1)

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

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

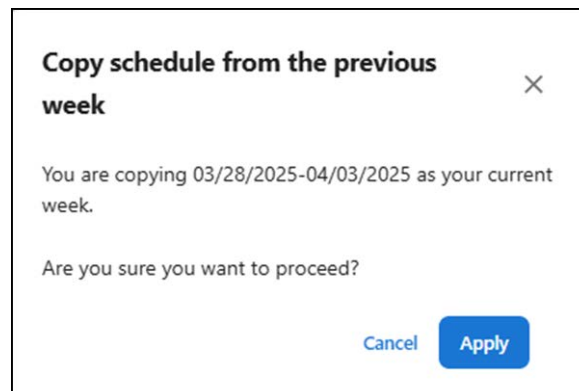
🔊 Add announcement

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

'Copy' schedule

To copy a schedule:

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



Confirmation window

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

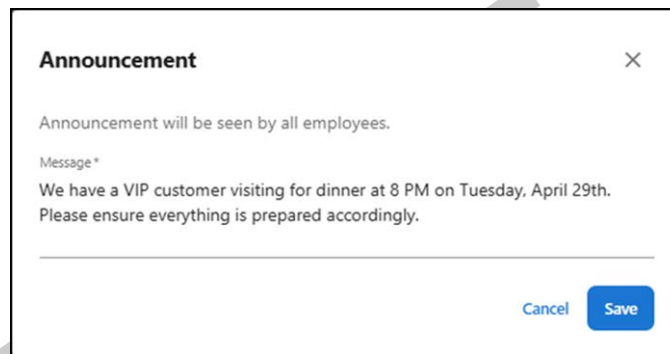
3. Click **Apply**. The system copies the schedule for the current-selected week and also all future schedule weeks as required.

Adding an announcement to a schedule

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

To add an announcement to a schedule:

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



Announcement X

Announcement will be seen by all employees.

Message *

We have a VIP customer visiting for dinner at 8 PM on Tuesday, April 29th.
Please ensure everything is prepared accordingly.

Cancel Save

'Announcement' screen

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

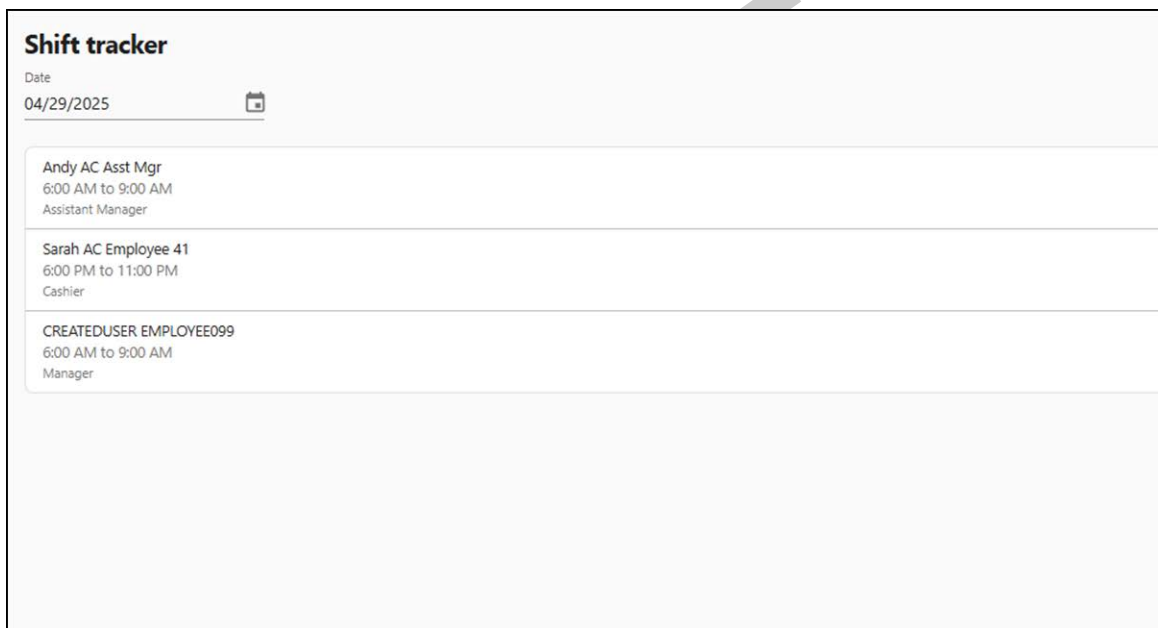
Viewing employees on a shift

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

To view employees on a shift:

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

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



'Shift tracker' screen

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

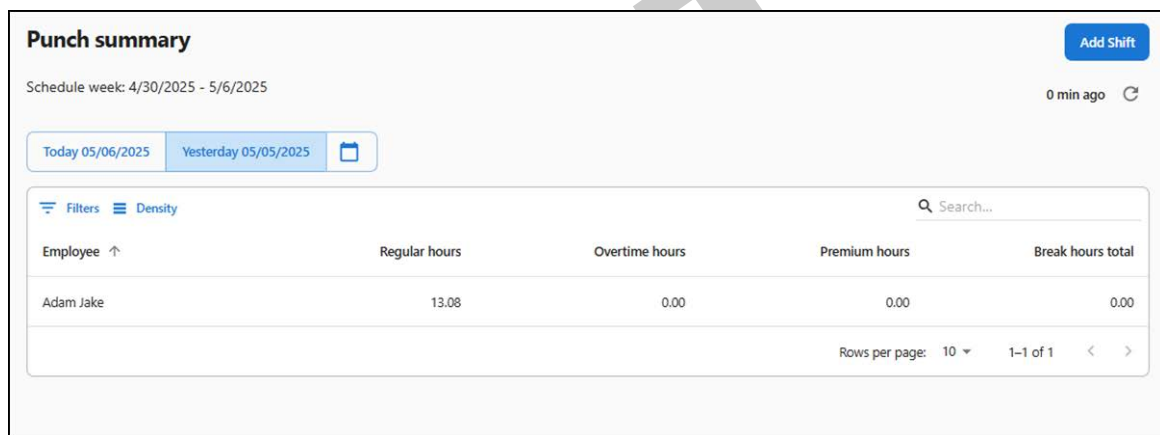
Working with punches

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

Use the 'Punch summary' screen to add 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 Add Shift

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

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

Filters Density Search...

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

Rows per page: 10 ▾ 1-1 of 1 < >

'Punch summary' screen

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

Punch summary Add Shift

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

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

Filters Density Search...

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

Rows per page: 10 1-1 of 1

Add Shift Close

* Indicates required fields

Date* 05/05/2025

Read only

Employee* Select

Job* Select

Clock in* Clock out*

Regular hours

Cancel

Save

'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.

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

× Close

Add Shift

* Indicates required fields

Date *
05/05/2025

Read only

Employee *
Select

Job *
Select

Clock in * Clock out *
--:-- -- --:-- --

Regular hours

+ Add break period

Total sales Declared tips
\$

Punch edit reason *
Select

Cancel

Save

'Add shift' screen

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

Close

Remove break period

Break type*
Select

Break out* Break in*
--:-- -- --:-- --

Break hours

+ Add break period

Total sales Declared tips
\$

Punch edit reason*
Select

Cancel

Save

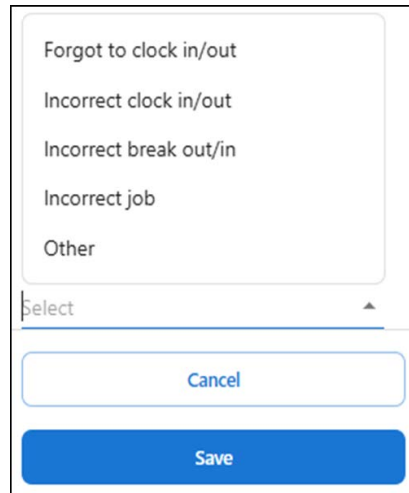
Break shift

Break type — Select the type of break. Select if paid or unpaid.

Break out — Select the time when the break started.

Break in — Select the time when the break ended.

8. View the employee **total sales**, if any. This is a read only field.
9. Enter **declared tips** of an employee, if necessary. You can view the log specific to the declared tips. For more information, refer to [Viewing the Activity Log on page 261](#).



The screenshot shows a dialog box for selecting a punch edit reason. It features a list of five options: "Forgot to clock in/out", "Incorrect clock in/out", "Incorrect break out/in", "Incorrect job", and "Other". Below the list is a "Select" dropdown menu with an upward-pointing arrow. At the bottom of the dialog are two buttons: a white "Cancel" button and a blue "Save" button.

Punch edit reason

10. Select **one** of the following **reasons** for the punch adjustment:

- Forgot to clock in/out** — Specifies the employee forgot to clock in or clock out.
- Incorrect clock in/out** — Specifies the employee did not clock in or out correctly.
- Incorrect break in/out** — Specifies the employee did not break in or out correctly.
- Incorrect job** — Specifies the employee selected the incorrect job.
- Others** — Miscellaneous reason for which the system-recorded punch was modified.

11. Click **Save**.

The screenshot shows the 'Punch summary' interface. At the top, it displays 'Schedule week: 4/30/2025 - 5/6/2025'. Below this, there are date selection buttons for 'Today 05/06/2025' and 'Yesterday 05/05/2025'. A success message 'Punch detail added' is visible in the top right corner, timestamped '0 min ago'. The main content is a table with columns: Employee, Regular hours, Overtime hours, Premium hours, and Break hours total. The table lists three employees: Jerin R (9.00 regular, 0.00 overtime, 0.00 premium, 0.00 break), Adam Jake (13.08 regular, 0.00 overtime, 0.00 premium, 0.00 break), and Bono Popu (8.00 regular, 0.00 overtime, 0.00 premium, 0.17 break). The table also includes a search bar, filters, and pagination controls (Rows per page: 10, 1-3 of 3).

'Punch summary' screen - Success message

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

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

To view shift details of an employee:

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

Punch summary Add Shift

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

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

Filters Density 🔍 Search...

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

Rows per page: 10 1-3 of 3 < >

'Punch summary' screen

2. Use the **date picker** to select the **day/week** to view the shift detail.
3. Click the **employee** to view the shift detail. The shift details of the employee appear.

PUNCH SUMMARY / JERIN R

Jerin R Add Shift

Shift details: 5/5/2025 0 min ago ↻

Shift 1 of 1 ⋮

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

'Shift details' of an employee

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

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

To edit shift details:

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

Punch summary Add Shift

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

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

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

Rows per page: 10 1-3 of 3

'Punch summary' screen

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

PUNCH SUMMARY / ADAM JAKE

Adam Jake Add Shift

Shift details: 5/5/2025 0 min ago

Shift 1 of 1

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

Edit shift details

4. Click the **three dots** at the right end of the shift details. The Edit and Delete icons appear.
5. Click **Edit** to make the necessary changes.

PUNCH SUMMARY / JERIN R

Jerin R Add Shift

Shift details: 5/5/2025 0 min ago

Shift 1 of 1

* Indicates required fields

Job* COOK	Clock in* 08:00 AM	Clock out* 05:10 PM	Hours 9.00
Total sales \$ 0.00	Declared tips \$	Punch edit reason* Incorrect break out/in	

Cancel Save

Edit shift details

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

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

To delete a punch:

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

Punch summary Add Shift

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

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

Filters Density 🔍 Search...

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

Rows per page: 10 1-3 of 3 < >

'Punch summary' screen



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

PUNCH SUMMARY / ADAM JAKE

Adam Jake Add Shift

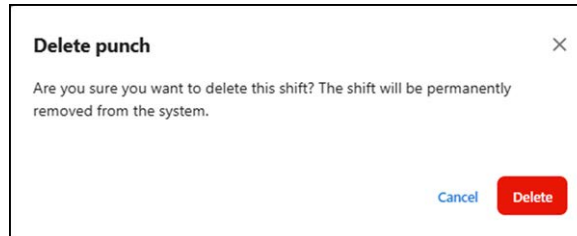
Shift details: 5/5/2025 0 min ago ↻

Shift 1 of 1 ⋮

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

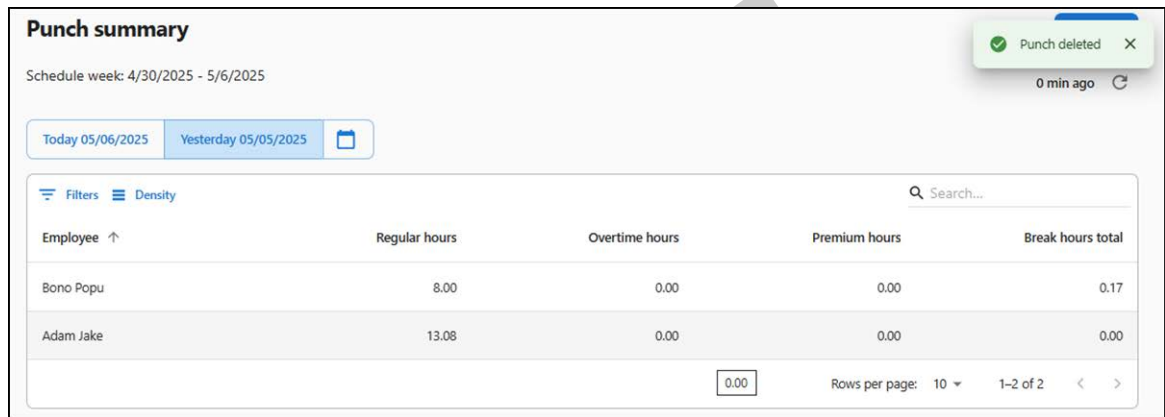
Delete shift details

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



Delete punch window

5. Click **Delete** to confirm.



Deleted punch message

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

Working with 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.

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

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

Approaching ACA threshold

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

Approaching hourly threshold Employee average hours worked

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

'Approaching hourly threshold' view

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

1. With the Approaching ACA threshold report open, select the **Approaching hourly threshold** tab.
2. Select the **site** from the drop-down.
3. Select the **date range** from the drop-down 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.

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.

Approaching ACA threshold

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

Approaching hourly threshold Employee average hours worked

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

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

‘Employee average hours worked’ view

To run the ‘Approaching ACA threshold’ report — ‘Employee average hours worked’ view:

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

The following information appears in the report:

Column	Description
Site	The site for which the report is generated.
Name	The first and last name of the employee.
Average hours worked	The average hours the employee worked per week during the selected date range.

DRAFT

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.

Name	Actual hours	Remaining hours	Expected total hours	Remaining hours before overtime	Next shift
Jack AC Employee 51	14.86	0.00	14.86	25.14	
Bhushan Madan	11.00	0.00	11.00	29.00	
Ashok Adapa	9.50	0.00	9.50	30.50	
Jenna AC Employee 50	7.57	0.00	7.57	32.43	
ASM 1.16 EmployeeAS...	7.08	0.00	7.08	32.92	
ACPOS Hari	2.05	0.00	2.05	37.95	
CREATEDUSER ASSTM...	2.00	0.00	2.00	38.00	
ACPOS Sudhanshu	1.24	0.00	1.24	38.76	
Sarah AC Employee 41	0.09	0.00	0.09	39.91	

'Approaching overtime threshold' report

To run the 'Approaching overtime threshold' report:

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

The data appears in three tiles:

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

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

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

Name	Actual hours	Remaining hours	Expected total hours	Remaining hours before overtime	Next shift
Jack AC Employee 51	14.86	0.00	14.86	25.14	
Bhushan Madan	11.00	0.00	11.00	29.00	
Ashok Adapa	9.50	0.00	9.50	30.50	
Jenna AC Employee 50	7.57	0.00	7.57	32.43	
ASM 1.16 EmployeeASMChg1	7.08	0.00	7.08	32.92	
ACPOS Hari	2.05	0.00	2.05	37.95	
CREATEDUSER ASSTMANAG...	2.00	0.00	2.00	38.00	
ACPOS Sudhanshu	1.24	0.00	1.24	38.76	
Sarah AC Employee 41	0.09	0.00	0.09	39.91	
Manager User666	0.00	0.00	0.00	40.00	

'Employee OT threshold' - Tabular report

The following information appears in the report:

Column	Description
Name	The name of the employee.
Actual hours	The total of the employee's punches for a week.
Remaining hours	The remaining hours the employee is scheduled to work.
Expected total hours	The total hours the employee is expected to work based on actual plus remaining.
Remaining hours before overtime	The difference between expected and 40 hours
Next shift	The next shift assigned to the employee.

Employee break

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

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

'Employee break' - Detailed view

To run the 'Employee break' report:

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

The data appears in two tiles as:

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

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

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

‘Employee break’ tabular report

The following information appears in the report:

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

Employee payroll

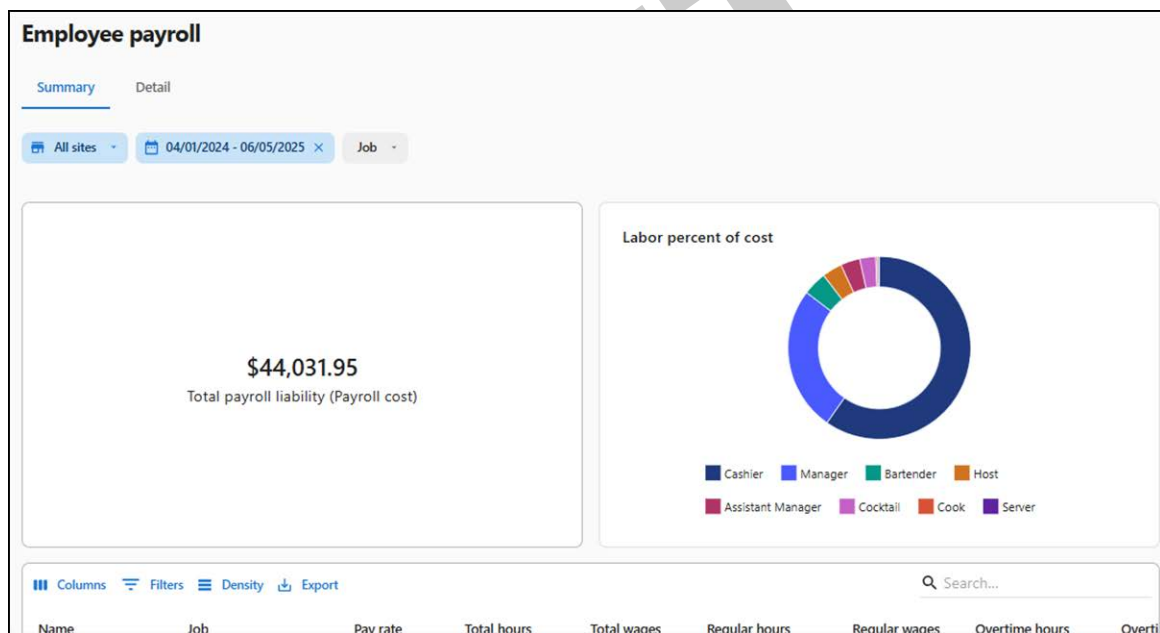
Use the 'Employee payroll' report to view employee payroll information for a selected pay period. The summary section of the report displays the hours and dollars by job, and any overtime or penalty pay earned by the employee. The detail section of the report displays information for individual punches.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

The 'Employee payroll' report provides two different views:

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

Viewing the 'Employee payroll' report - Summary view

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



'Summary' view

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

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

The following details appear in the tiles:

Total payroll liability (Payroll cost) — Total cost incurred as salary to the restaurant or to all of the employees for the selected period.

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

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

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

'Employee payroll' report

The following information appears in the report:

Column	Description
Name	The name of the employee.
job	The job under which the employee worked.
Pay rate	The pay rate for the job under which the employee worked.
Total hours	The total number of hours the employee worked.
Total wages	Total amount paid to the employee.
Regular hours	The total number of regular hours worked.
Regular wages	The salary of the employee.
Overtime hours	The hours the employee worked as overtime.
Overtime wages	The amount paid to the employee for working overtime.
Premium hours	The hours the employee worked overtime.
Premium wages	The amount paid to the employee for working overtime.
Total net sales	The amount of sales belonging to that particular employee.
Declared tips	The total amount of tips declared.
Total tips	Total tips paid through the POS.
Tip percent	The percentage of tips amount.

 **Note**

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

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

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

The following details appear in the tiles:

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

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

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

'Employee payroll' report - Detail view

The following information appears in the report:

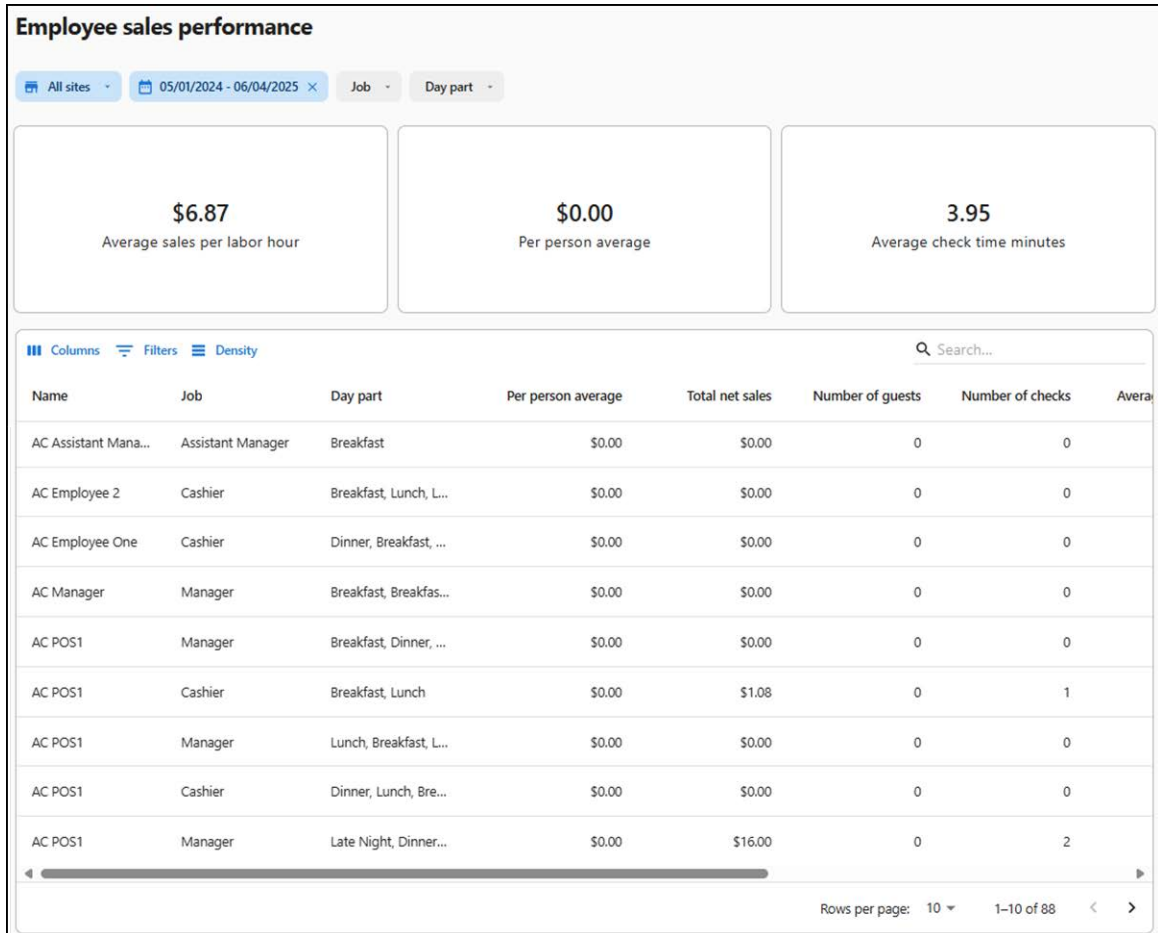
Column	Description
Name	Name of the employee.
Business date	The date of transaction.
Job	The job under which the employee worked.
Pay rate	The pay rate for the job under which the employee worked.
Clock in	Employee clock in time.
Clock out	Employee clock out time.
Break type	Specifies the type of break the employee had.
Total hours	The total number of hours the employee worked.
Total wages	Total amount paid to the employee.
Regular hours	The total number of regular hours worked.
Regular wages	The salary of the employee.
Overtime hours	The hours the employee worked as overtime.
Overtime wages	The amount paid to the employee for working overtime.
Premium hours	The hours the employee worked overtime.

Column	Description
Premium wages	The amount paid to the employee for working overtime.
Total net sales	The amount of sales belonging to that particular employee.
Declared tips	The total amount of tips declared.
Total tips	The total amount of tips.
Tip percent	The percentage of tips amount.

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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.

The following details appear in tiles:

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

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

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

The following information appears in the report:

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

Generic payroll export

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

Generic payroll export							
All sites		06/04/2024 - 06/05/2025					
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.

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

Generic payroll export

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

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

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

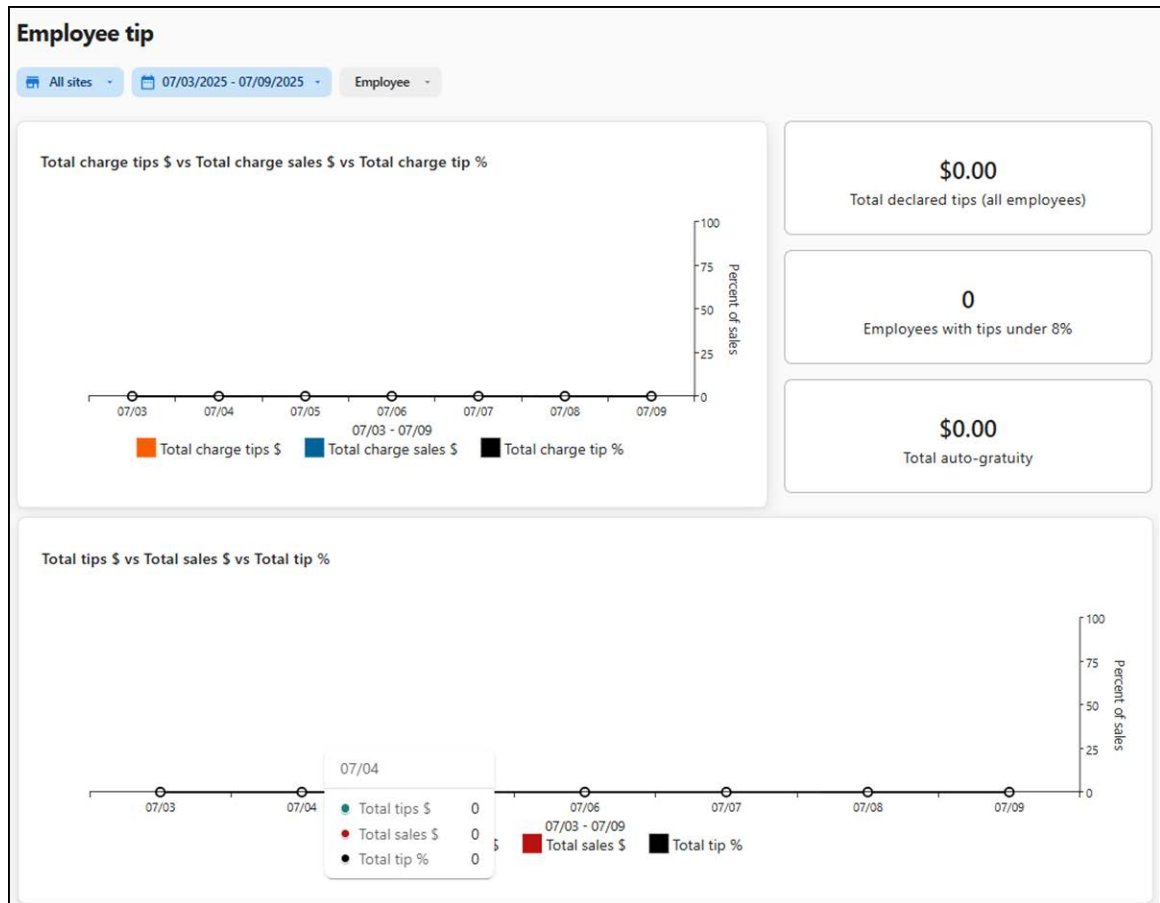
'Generic payroll report' - Export option

Note

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

Employee tip

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



Employee tip report

To run the 'Employee tip' report:

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

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

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

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

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

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

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

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

'Employee tip report' details

The data in the table appears with the following information:

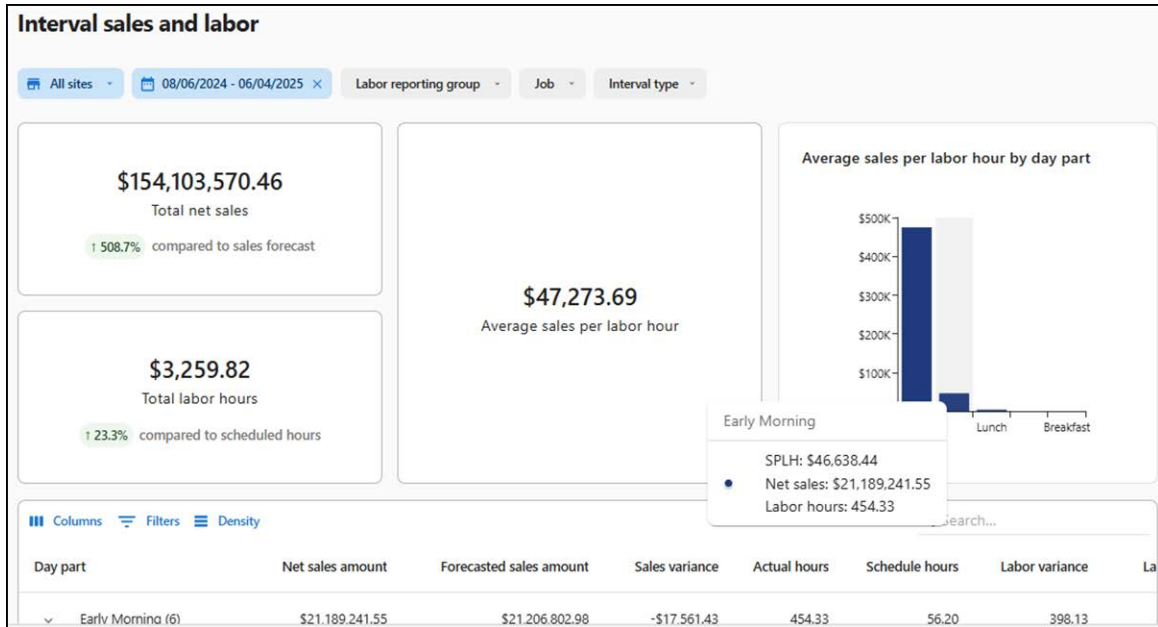
Column	Description
Name	The name of the employee.

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.

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

Day part	Net sales amount	Forecasted sales amount	Sales variance	Actual hours	Schedule hours	Labor variance	Labor cost amount	Lat
Early Morning (6)	\$21,189,241.55	\$21,206,802.98	-\$17,561.43	454.33	56.20	398.13	\$8,171.07	0
12:00 AM	\$6,045.12	\$6,674.94	-\$629.82	71.95	0.75	71.20	\$1,272.23	21
1:00 AM	\$16,736.82	\$12,004.13	\$4,732.68	75.76	9.25	66.51	\$1,302.76	7
2:00 AM	\$21,019,595.40	\$21,023,978.32	-\$4,382.92	75.60	8.75	66.85	\$1,384.16	0
3:00 AM	\$31,467.64	\$45,261.40	-\$13,793.76	71.65	6.00	65.65	\$1,307.27	4
4:00 AM	\$81,110.57	\$90,739.28	-\$9,628.71	72.83	6.50	66.33	\$1,341.17	1
5:00 AM	\$34,286.00	\$28,144.90	\$6,141.09	86.55	24.95	61.60	\$1,563.48	4
Breakfast (5)	\$131,618.81	\$128,920.89	\$2,697.92	863.24	760.47	102.77	\$13,083.20	5
6:00 AM	\$7,755.64	\$16,680.57	-\$8,924.93	122.33	84.00	38.33	\$1,951.78	25
7:00 AM	\$30,727.80	\$18,939.52	\$11,788.29	134.53	105.25	29.28	\$2,101.68	6
8:00 AM	\$21,478.14	\$23,293.81	-\$1,815.68	191.25	176.00	15.25	\$2,889.61	15

‘Interval sales and labor’ report

The following data appears in tabular form:

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

About inventory 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 vendor items](#)
- [Working with purchase orders](#)
- [Working with invoices](#)
- [Counting inventory and managing locations](#)
- [Managing recipes](#)
- [Viewing and mapping sales items](#)
- [Viewing modifier groups](#)

Inventory reports:

- [Invoice history](#)
- [COGS Actual vs. Theoretical Detail](#)
- [Top 20 item usage](#)
- [Perpetual inventory on-hand](#)
- [Low stock report](#)

See Also:

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

Managing units of measure

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.

To create a custom unit of measure:

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

Units of measure

Units of measure are used to define amount of goods for ordering, invoicing, prepping, and food costing. View and manage all units of measure here. Create unit

Columns Filters Density Search...

Unit Name	Unit type	Conversion type	Class	Qua...	Unit
1 L=2 ea	Custom	Neither	Count	2	Each (ea)
1 kg=1 dz	Custom	Neither	Count	1	Dozen (dz)
1 kg=20 ea	Custom	Neither	Count	20	Each (ea)
1 kg=10 ea	Custom	Neither	Count	10	Each (ea)
1 kg=5 ea	Custom	Neither	Count	5	Each (ea)
1 L=5 ea	Custom	Neither	Count	5	Each (ea)
dz=1 ea	System	Neither	Count	1	Each (ea)
gal=5/1 L	System	Metric	Volume	5	Liter (L)
cs=5 kg	System	Metric	Weight	5	Kilogram (kg)
cs=100 ea	System	Neither	Count	100	Each (ea)

Rows per page: 10 1-10 of 180

'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.

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.

Close

Custom unit of measure

* Indicates required fields

Custom

Quantity* Starting unit*

is equal to

Class*

Quantity* Conversion unit*

Preview Name:

This unit is

Cancel

Save

'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)

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

Close

Custom unit of measure

* Indicates required fields

Custom

Quantity* Starting unit*

1 Case (cs)

is equal to

Class*

Volume

Quantity* Conversion unit*

10 Liter (L)

Preview Name:

1 cs = 10 L

This unit is 1 cs containing 10 L or 10,000 mL

Cancel

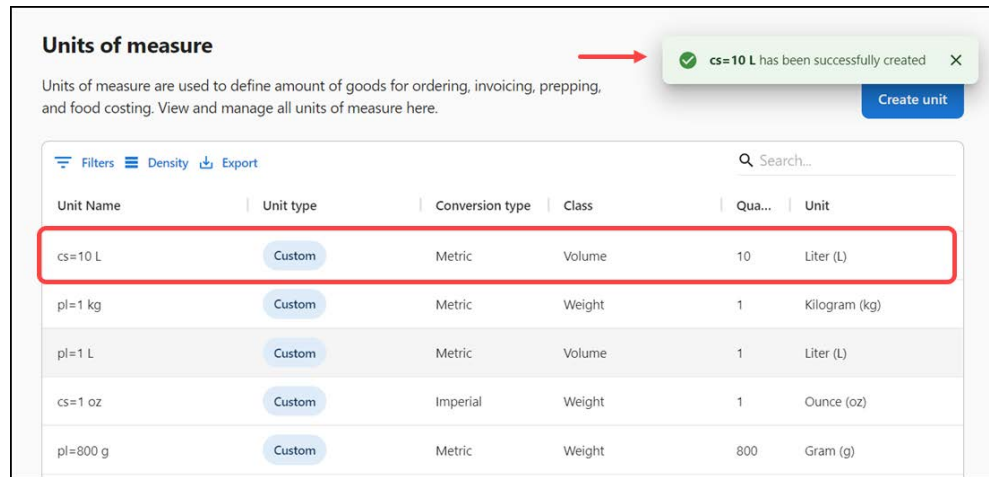
Save

Saving custom unit of measure

- 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.'



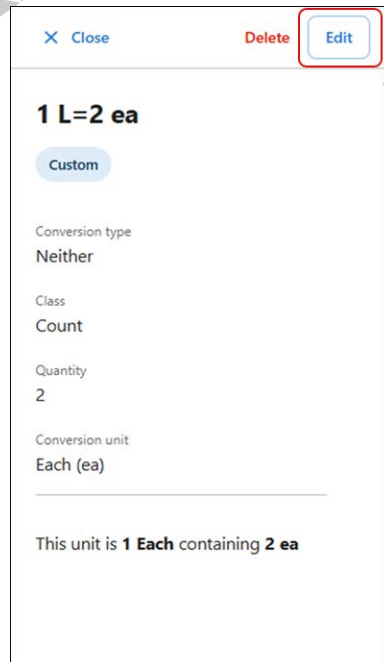
Custom unit of measure is created

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

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

The screenshot shows a mobile application dialog box for configuring a custom unit of measure. At the top, there is a 'Close' button with an 'X' icon. Below that, the title '1 L=2 ea' is displayed, followed by a note '* Indicates required fields'. A 'Custom' button is highlighted. The form contains two rows of input fields: the first row has 'Quantity' set to '1' and 'Starting unit' set to 'Liter (L)'; the second row has 'Quantity' set to '2' and 'Conversion unit' set to 'Each (ea)'. Below these fields, the text 'is equal to' is shown, followed by 'Class' set to 'Count'. At the bottom of the dialog, there is a 'Preview Name:' section showing '1 L=2 ea' and 'This unit is 1 L containing 2 ea'. Two buttons, 'Cancel' and 'Save', are located at the very bottom.

Saving the updated custom UOM

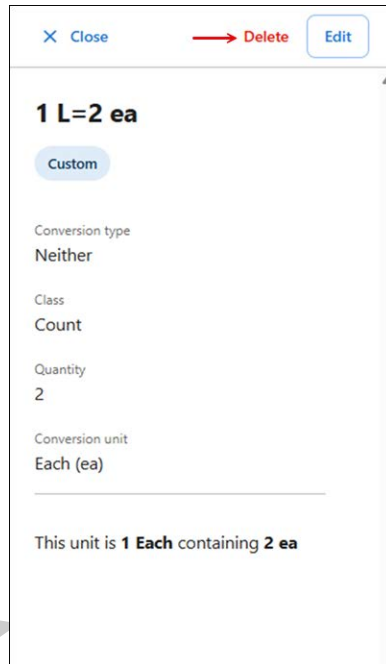
5. Click **Save** to confirm the changes.

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**.

Working with raw items

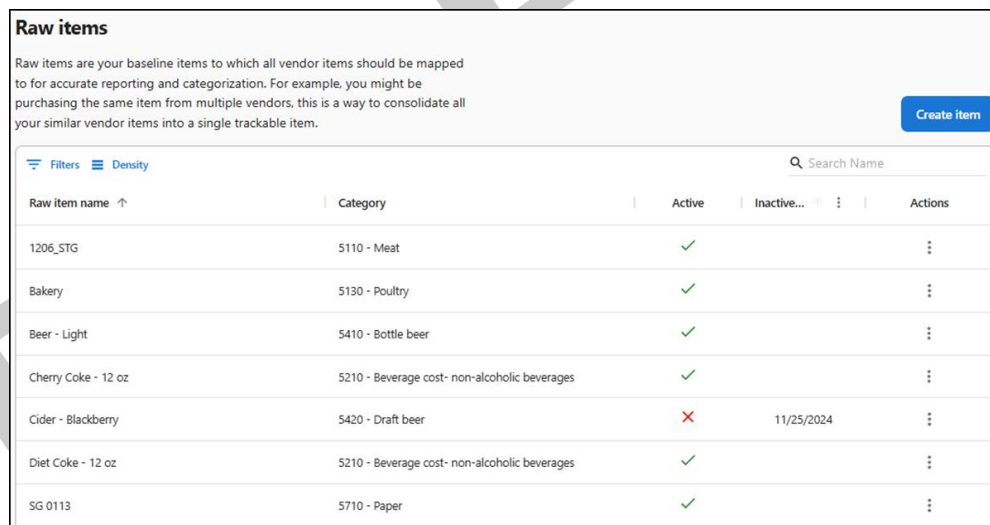
Raw items, also referred to as raw materials, are your baseline items, such as the ingredients needed to prepare a finished product for sale to your consumers. Common examples include sugar, salt, chicken, beef, bread, tomatoes, onions, and much more.

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

Filters Density Search Name

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

Create Item

'Raw items' screen

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

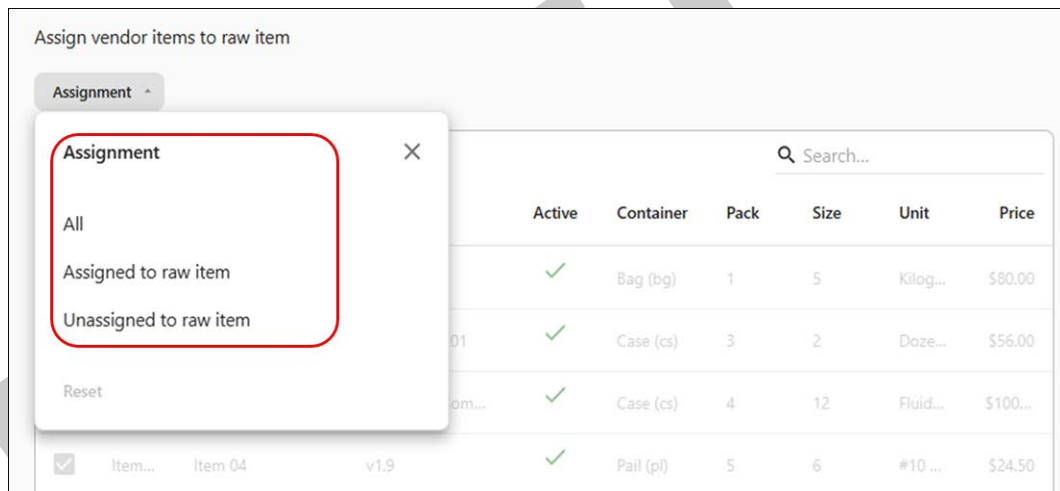
'Create raw item' screen

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

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

- 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.

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

Unassigned to raw item X

Filters Density Search: tomato X

Item...	Item name ↑	Vendor	Active	Container	Pack	Size	Unit	Price
617	Tomato	V1.11 Smoke tes...	✓	Bag (bg)	3	4	Poun...	\$0.00

1 row selected Rows per page: 10 1-1 of 1 < >

Current selection: 1 item selected Clear selection

Tomato X

Cancel Save

Assign vendor items to raw item

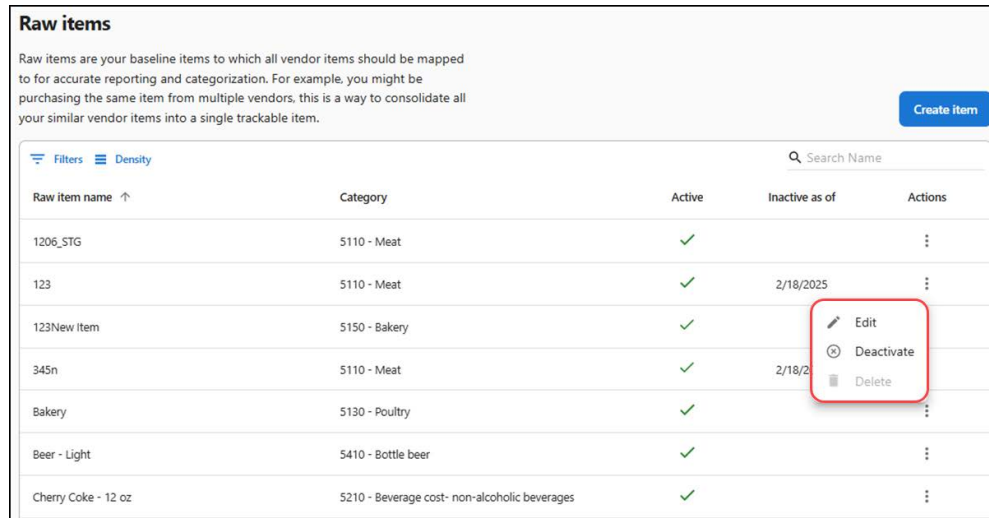
9. Click **Save** to create the raw item.

DRAFT

To edit a raw item:

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

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



Raw items

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

Filters Density Search Name

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

Edit a raw item

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.

The screenshot shows the 'General information' screen for a raw item named 'apple'. The page title is 'apple' and the breadcrumb is 'RAW ITEMS / APPLE'. The 'General information' tab is active. A red box highlights the 'Edit' button in the top right corner, with a red arrow pointing to it from the left. Below the tab, there is a note: '* Indicates required fields'. The 'Last edit' information is: 'Last edit was by 3/2/2024 by acct:commerce@00ubrzsifax9tpom1d7-ncr.asm.qe+stg-yp-admin@gmail.com'. There is a 'Deactivate on' field with a calendar icon and the format 'MM/DD/YYYY'. The 'Raw item name*' field contains 'apple' and is locked. The 'Category*' dropdown menu is set to '5140 - Produce'. Below this is a 'Vendor items' section with a table. The table has columns: 'Ite...', 'Item na...', 'Vendor', 'Ac...', 'Cont...', 'Pack', 'Size', 'Unit', and 'Price'. The table also has 'Filters', 'Density', and 'Export' options, and a search bar.

'General information' screen

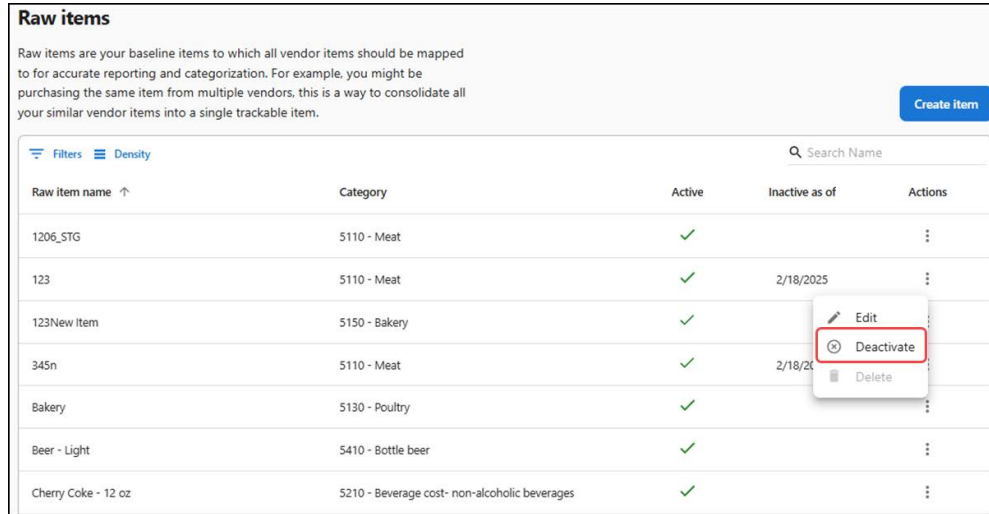
3. Click **Save**. A success message appears and automatically dismisses. The raw item is updated with the modifications.
4. Click **RAW ITEMS** at the top of the screen to return to the 'Raw items' screen.

To deactivate a raw item:

Note

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

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



Raw items

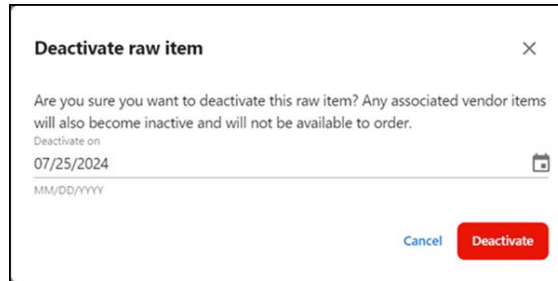
Raw items are your baseline items to which all vendor items should be mapped to for accurate reporting and categorization. For example, you might be purchasing the same item from multiple vendors, this is a way to consolidate all your similar vendor items into a single trackable item.

Filters Density Search Name

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

Deactivate a raw item

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.



The dialog box is titled "Deactivate raw item" and contains the following text: "Are you sure you want to deactivate this raw item? Any associated vendor items will also become inactive and will not be available to order." Below this text is a "Deactivate on" field with the date "07/25/2024" and a calendar icon. At the bottom, there are two buttons: "Cancel" and "Deactivate".

'Deactivate raw item' confirmation message

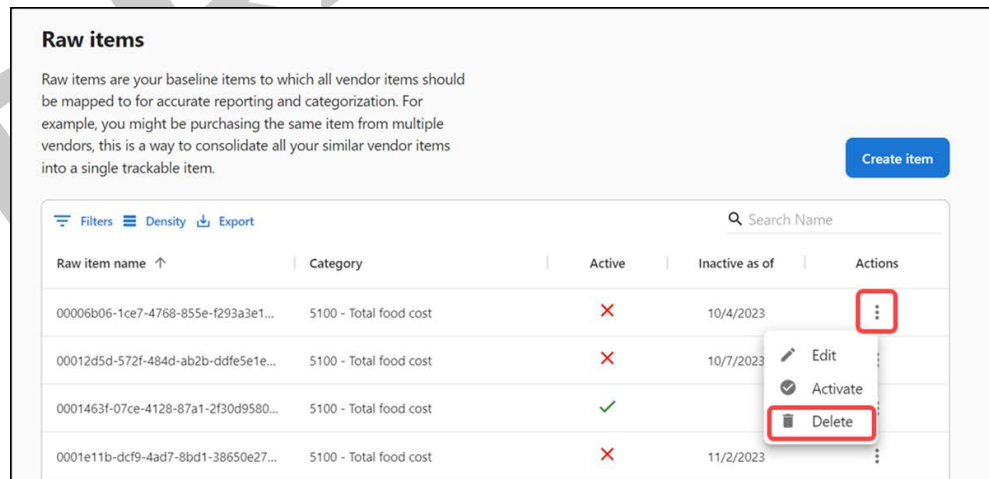
3. Click **Deactivate** to confirm the deactivation of the raw item, or click **Cancel** to return to the 'Raw items' screen.

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.

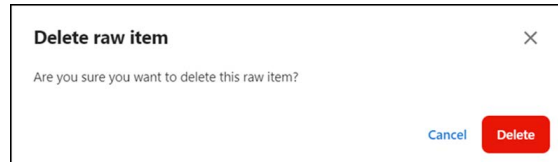


The screenshot shows the "Raw items" screen with a table of items. The table has columns for "Raw item name", "Category", "Active", "Inactive as of", and "Actions". A context menu is open over the "Actions" column of the first row, showing options for "Edit", "Activate", and "Delete".

Raw item name ↑	Category	Active	Inactive as of	Actions
00006b06-1ce7-4768-855e-f293a3e1...	5100 - Total food cost	×	10/4/2023	⋮
00012d5d-572f-484d-ab2b-ddfe5e1e...	5100 - Total food cost	×	10/7/2023	✎ Edit
0001463f-07ce-4128-87a1-2f30d9580...	5100 - Total food cost	✓		☑ Activate
0001e11b-dc19-4ad7-8bd1-38650e27...	5100 - Total food cost	×	11/2/2023	🗑 Delete

Delete raw item

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.



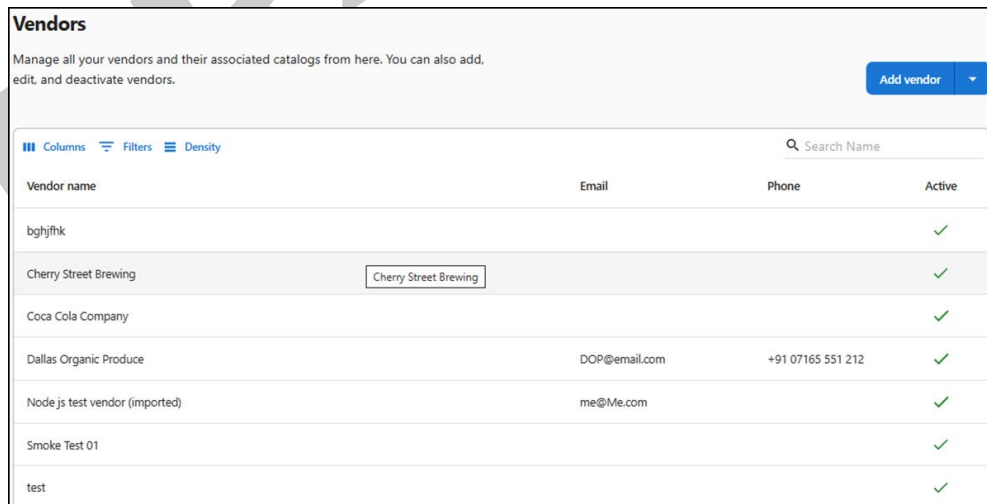
'Delete raw item' confirmation

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

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.

Additionally, ASM is integrated with the SFTP (Secure File Transfer Protocol) which allows you to set up a secure way for the system to send and receive files from a vendor. The SFTP helps protect important information while it is being transferred.



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

Adding vendor



Reference

Refer to "[Appendix A: Bulk importing vendors and vendor items on page 295](#)" for information on using a .CSV file to upload vendors in bulk.

To add a vendor manually:

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

The screenshot shows the 'Vendors' management interface. At the top, there is a navigation bar with a menu icon, a search bar, and user profile information. Below the navigation bar, the title 'Vendors' is displayed, followed by a brief instruction: 'Manage all your vendors and their associated catalogs from here. You can also add, edit, and deactivate vendors.' To the right of this text is a blue 'Add vendor' button with a dropdown arrow. Below the instruction is a table with the following columns: Vendor name, Email, Phone, and Active. The table contains 10 rows of vendor data. At the bottom right of the table, there is a pagination control showing 'Rows per page: 10' and '1-10 of 22'.

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

'Vendors' screen

12. Under the 'SFTP Settings' group bar, enter the **host address** of the vendor's SFTP server. This indicates the system where to connect.
13. Enter the **port number** of connecting server. The port defines the entry point for the SFTP connection.
14. Enter the **user name** and **password** for the SFTP account. The system uses the credentials to authenticate before transferring any files.
15. Enter the exact **directory** on the SFTP server where files must be uploaded or downloaded.
16. Enter the **file format**. It indicates the type or structure of the files used to upload or download files from the SFTP server.



Note

For Sysco file format, ensure the customer account number is available.

17. Under the 'More details' group bar, enter any **additional information** about the vendor in 'Comments.'
18. 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](#).

DRAFT

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.

Cherry Street Brewing details

General Information Catalog Order & delivery

(* Indicates required fields) Last edit was 8/8/2025 by acct:commerce@00ubwzn8f7kqhexps1d7-nrc.asm.qe+stg-admin@gmail.com

Active vendor

Vendor name * A/P Code
Cherry Street Brewing

Country
United States

Street address Apartment/Suite
1 Vickery Creek Lane

City State Postal code
Cumming Georgia 30040

Vendor contact

Contact name Contact title Phone number

Email address Customer account number

Back Save

Editing general information of vendor

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

Working with vendor items

After you add a vendor, you can associate the items you purchase from the vendor to the vendor. All vendor items must first be associated with a raw item.



Reference

For more information on associating a raw item with a vendor item, refer to [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.

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

'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.

The screenshot displays the 'Cherry Street Brewing details' page. The 'Catalog' tab is selected in the navigation bar. Below the navigation bar, there is a message: 'This is the vendor catalog section. In here, you can find all of the items associated to this vendor and you can add, edit, and deactivate/exclude items.' To the right of this message is a blue button labeled 'Add vendor item'. Below the message is a table with the following columns: Item code, Name / Description *, Purchase unit *, Receive unit *, Price *, Raw Item, GL account, Active, and Actions. The table contains one row with the following data: Item code: 2000, Name / Description *: Irish Red, 12 oz, Purchase unit *: PT=12 oz, Receive unit *: Ounce (oz), Price *: \$3.50, Raw Item: Bhavaneshtest Rawitem, GL account: 5160 - Dairy, Active: Active, and Actions: a vertical ellipsis icon. At the bottom right of the table, there is a 'Rows per page: 10' dropdown and '1-1 of 1' with navigation arrows. A 'Back' link is located at the bottom right of the page.

'Catalog' tab

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

Close

Add item

* Indicates required fields

Active

Item code

Name / Description*

Container*

Packs per case*

If there are no packs in the case, enter 1

Size* Unit*

Catch weight item

Price*
\$ 0.00

Save & close

Save & add another

'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.
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.

The screenshot shows a web interface for a vendor catalog. At the top, there are tabs for 'General Information', 'Catalog', and 'Order & delivery'. Below the tabs, there is a message: 'This is the vendor catalog section. In here, you can find all of the items associated to this vendor and you can add, edit, and deactivate/exclude items.' To the right of this message is a blue button labeled 'Add vendor item'. Below the message is a table with columns: 'Item code', 'Name / Description *', 'Purchase unit *', 'Receive unit *', 'Price *', 'Raw Item', and 'Actions'. The first row of the table is highlighted with a red box and contains the following data: '8383', 'Milk Bread', 'BG=1 ea', 'Each (ea)', '\$5.00', 'butter', and a vertical ellipsis icon in the 'Actions' column.

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

Manually added vendor item

Modifying a vendor item

1. Select **Inventory > Vendors**. The available vendors appear.
2. Select the **vendor** that sells the item. The vendor details appear with the 'General information' tab as the active tab.

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

Coca Company details

General Information **Catalog** Order & delivery

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

⚠ You have 10 unmapped item(s). Make sure to map all your vendor items to a raw item and a category to get accurate reports.

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

Filters Density Search Name

Item code	Name / Description *	Purchase unit *	Receive unit *	Price *	Raw Item	GL account	Actions
100	SGTT item one	CS=100 oz	Ounce (oz)	\$0.00	345n	5110 - Meat	⋮
700	SGTT item seven	CS=7/700 lb	Pound (lb)	\$0.00	Unassigned	Unassigned	⋮
400	SGTT item four	CS=4/400 g	Gram (g)	\$0.00	Unassigned	Unassigned	⋮

Edit
Deactivate

Back

Edit vendor item

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

Coca Company details

General Information **Catalog** Order & delivery

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

⚠ You have 10 unmapped item(s). Make sure to map all your vendor items to a raw item and a category to get accurate reports.

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

Filters Density Search Name

Item code	Name / Description *	Purchase unit *	Receive unit *	Price *	Raw It	Actions
100	SGTT item one	CS=100 oz	Ounce (oz)	\$0.00	345n	⋮
700	SGTT item seven	CS=7/700 lb	Pound (lb)	\$0.00	Unass	⋮
400	SGTT item four	CS=4/400 g	Gram (g)	\$0.00	Unass	⋮

SGTT item seven

* Indicates required fields

Active

Item code
700

Name / Description *
SGTT item seven

Container *
Case (cs)

Packs per case *
7
If there are no packs in the case, enter 1

Save & close

Save & add another

Edit vendor item options

6. Click **Save & close** to save the changes and close the vendor item edit window, or click **Save & add another** to save the edits and add another vendor item.
7. Click the **Order & delivery** tab. The existing schedules appear.
8. Update the **order day** and **delivery day** as required.
9. Click **Save**. A success message appears for updating the schedule.

Note

If you want to delete the schedule, click **Delete** against the schedule and click **Save**.

Deactivating a vendor item

1. Select **Inventory > Vendors**. The available vendors appear.
2. Select the **vendor** that sells the vendor item. The 'Vendor details' screen appears with the 'General information' tab as the active tab.
3. Select the **Catalog** tab to view a list of the vendor items.

Coca Company details

General Information **Catalog** Order & delivery

(* Indicates required fields) Last edit was 2/4/2025 by acctcommerce@00ubwzrn8f7kqhexps1d7-ncr.asm.qe+stg-admin@gmail.com

⚠ You have 10 unmapped item(s). Make sure to map all your vendor items to a raw item and a category to get accurate reports.

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

Filters Density Search Name

Item code	Name / Description *	Purchase unit *	Receive unit *	Price *	Raw Item	GL account	Actions
100	SGTT item one	CS=100 oz	Ounce (oz)	\$0.00	345n	5110 - Meat	⋮
700	SGTT item seven	CS=7/700 lb	Pound (lb)	\$0.00	Unassigned	Unassigned	⋮
400	SGTT item four	CS=4/400 g	Gram (g)	\$0.00	Unassigned	Unassigned	⋮

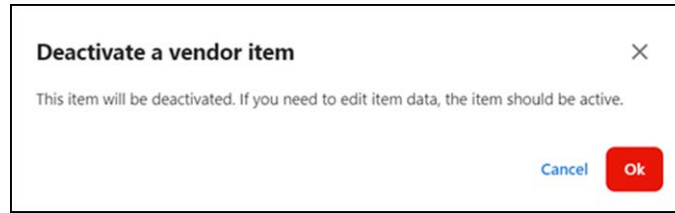
[Edit](#)
[Deactivate](#)

Back

Vendor details 'Catalog' tab

4. Select a **vendor item**.

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



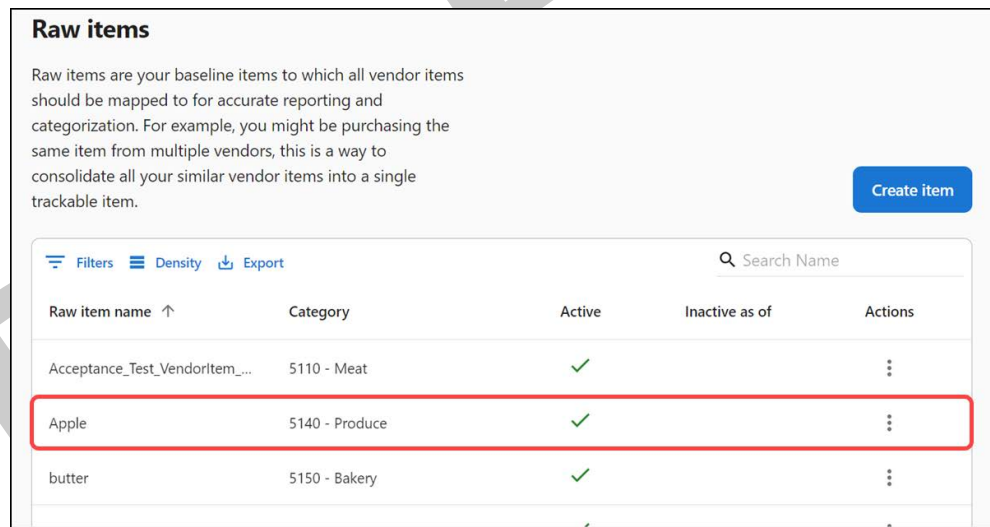
Deactivate confirmation message

6. Click **Ok** to confirm.

Using 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

Unassigned to raw item X

Filters Density Search: tomato X

<input checked="" type="checkbox"/>	Item...	Item name ↑	Vendor	Active	Container	Pack	Size	Unit	Price
<input checked="" type="checkbox"/>	617	Tomato	V1.11 Smoke tes...	✓	Bag (bg)	3	4	Poun...	\$0.00

1 row selected Rows per page: 10 1-1 of 1 < >

Current selection Clear selection

1 item selected

Tomato X

Cancel Save

'Assign vendor items to raw item' group bar

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.

Working with vendor item order and delivery

Administrators and managers can use the **Order & delivery** feature to manage vendor schedules more effectively by pairing order days with expected delivery days. This allows restaurant teams to plan inventory replenishment with greater accuracy, ensuring they receive supplies when needed based on their ordering patterns. Users can assign specific day combinations for each vendor, making it easier to forecast deliveries, avoid stock-outs, and streamline purchasing workflows.

With this feature, you can:

- Align inventory planning with vendor schedules.
- Reduce last-minute ordering and improve stock consistency.

To specify the order and delivery days of a vendor:

1. Select **Inventory > Vendors**. The available vendors appear.
2. Select the **vendor** to set the delivery schedule.
3. Click the **Order & delivery** tab.
4. Click **Add schedule**.
5. Select the day when an **order is created** for that vendor.

Select the **expected day of delivery**. For example, if you set the order day as Monday and the delivery day as Wednesday, it indicates that an order created on a Monday is usually delivered on Wednesday of the same week for that vendor.

Note

You cannot set the same combination of order and delivery days multiple times for the same vendor. For example, if you already scheduled an order on Monday with a delivery on Wednesday, you cannot create another order for that vendor with the same Monday–Wednesday pairing.

Milan

General Information Catalog **Order & delivery**

(* Indicates required fields) Last edit was 4/30/2024 by acct:commerce@00u7obo2hrds2esz41d7-ncr.cbo.eng+user01@gmail.com

Delivery schedule

Order by Monday for delivery on the following Wednesday

[Add schedule](#)

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

Create an order and its delivery schedule

6. Click **Save**. A success message appears for creating the schedule.

To update the schedule:

1. Select **Inventory > Vendors**. The available vendors appear.
2. Select the **vendor**.
3. Click the **Order & delivery** tab. The existing schedules appear.
4. Update the **order day** and **delivery day** as required.
5. Click **Save**. A success message appears for updating the schedule.

To delete the schedule:

1. Select **Inventory > Vendors**. The available vendors appear.
2. Select the **vendor**.
3. Click the **Order & delivery** tab. The existing schedules appear.
4. Click the **delete icon** against the required schedule.
5. Click **Save**. A success message appears.

Working with purchase orders

A purchase order contains a list of items the restaurant wants from a vendor. The list of vendor items are managed in a vendor catalog that is already stored in ASM. The restaurant manager uses the 'Purchase order' feature to manage all your purchase orders (POs) at one place. You can create, track, and update POs directly from the system, ensuring timely and accurate ordering of ingredients and supplies. Using this option, you can view the vendor details and monitor delivery information. This feature helps you reduce manual errors, streamline communication, and keep your inventory aligned with your restaurant's needs.

With this feature, you can:

- Create and submit POs to approved vendors.
- Easily select the vendor items using the vendor catalog that is available for selection while creating a purchase order.
- Quickly fill basic information about the vendor such as contact person of the sales representative, the email address of sales representative and the delivery date based on order date.
- Send PO to vendor via electronic data interchange (EDI) or email.
- View the recent history (up to last four orders) of a specific vendor item.
- View the current status of the purchase order.

Statues of purchase order

There are four statues that identifies the stage at which a purchase order is:

Status	Description
Draft	PO creation is in-progress and is not sent to the vendor for confirmation. You can edit the order details and send it later.
Sent	PO is sent to the vendor for confirmation. The vendor is yet to confirm. Once confirmed, the status changes to 'Confirmed' and an acknowledgment is received in ASM. Otherwise, the status changes to 'Unconfirmed' after 72 hours.
Confirmed	Vendor has confirmed the PO.
Unconfirmed	Vendor has not confirmed the PO (after 72 hours of sending PO to the vendor).

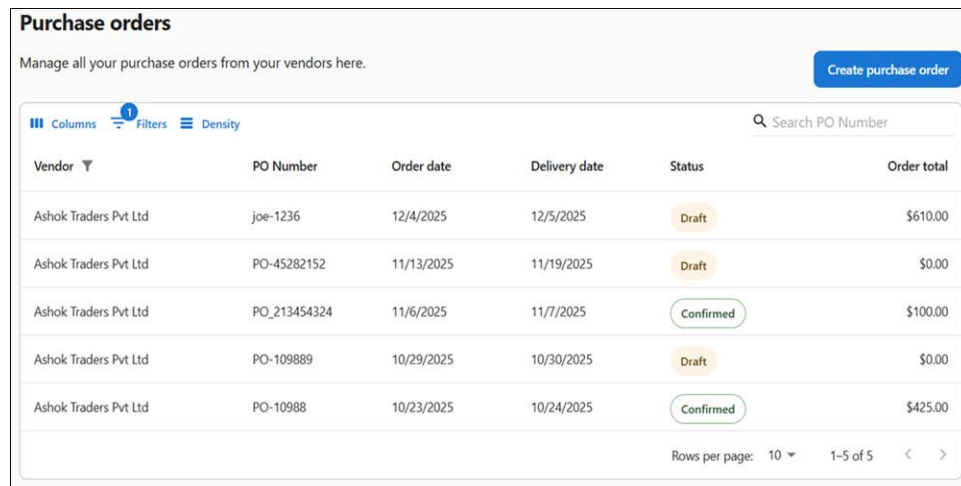
Creating a purchase order

Use the 'Create purchase order' option to create a new purchase order and send it to the vendor. You must follow the below steps to create a purchase order:

1. Enter the vendor information.
2. Set the delivery date information.
3. Add items manually to the PO or add system suggested items.
4. Send the PO to vendor.

Step1: Adding vendor information

1. Select **Inventory > Purchase orders**. The Purchase orders screen appears.



The screenshot shows the 'Purchase orders' interface. At the top, there is a header 'Purchase orders' and a sub-header 'Manage all your purchase orders from your vendors here.' A blue button labeled 'Create purchase order' is in the top right. Below the header is a table with columns: Vendor, PO Number, Order date, Delivery date, Status, and Order total. The table contains five rows of data. At the bottom right, there is a pagination control showing 'Rows per page: 10' and '1-5 of 5'.

Vendor	PO Number	Order date	Delivery date	Status	Order total
Ashok Traders Pvt Ltd	joe-1236	12/4/2025	12/5/2025	Draft	\$610.00
Ashok Traders Pvt Ltd	PO-45282152	11/13/2025	11/19/2025	Draft	\$0.00
Ashok Traders Pvt Ltd	PO_213454324	11/6/2025	11/7/2025	Confirmed	\$100.00
Ashok Traders Pvt Ltd	PO-109889	10/29/2025	10/30/2025	Draft	\$0.00
Ashok Traders Pvt Ltd	PO-10988	10/23/2025	10/24/2025	Confirmed	\$425.00

Viewing list of existing POs

2. Click **Create purchase order**. The Purchase order screen appears.
3. Under the **Vendor information** section, select a vendor or enter the **name** of the vendor. A unique **purchase order number** automatically appears, which you can modify.



Tip

If there are no active items for the selected vendor, an alert appears to access the vendor catalog. Use **Open vendor catalog** to add items that the vendor handles.

The screenshot shows a web interface for creating a purchase order. At the top, it says 'PURCHASE ORDERS / PURCHASE ORDER'. Below that is the title 'Purchase Order' and a note '* Indicates required fields'. The section is titled 'Vendor information'. A yellow warning box contains the text: 'This vendor does not have any active items in the vendor catalog, or vendor items are not linked to raw items. You may add items to the catalog or choose a different vendor.' To the right of this box is a red-bordered button labeled 'Open vendor catalog'. Below the warning box, there are two input fields: 'Vendor name*' with a dropdown menu showing 'New 2222' and 'Purchase order number*' with a red underline and the word 'Required' below it.

Option to open vendor catalog

4. Upon entering the vendor name, the following **details** are auto-populated, if it is already configured:

Note

The name and email address are auto-populated from the **Vendors** screen. You can change the sales representative's name and email address as required.

Sales representative name — The name of the sales representative at the vendor location.

Sales representative e-mail — The email address of the sales representative for communication. The purchase order confirmation email is sent to this email address. The name is auto-populated from the **Vendors** screen.

Step 2: Adding delivery date information

1. Under the **Delivery information** section, select the **order date** to place the order.
2. Upon selecting the order date, the **delivery date** is auto-calculated. This depends on the order date and the delivery schedule set in the **Order & delivery** tab of the Vendors screen. You can change the order date and delivery date as required.

3. (Optional) Enter **additional notes** about the purchase order.

The screenshot shows a web interface for creating a Purchase Order. At the top, it says 'PURCHASE ORDERS / PURCHASE ORDER'. The main heading is 'Purchase Order'. Below this, there is a note: '* Indicates required fields'. The form is divided into sections: 'Vendor information' and 'Delivery information'. Under 'Vendor information', there are two columns of input fields. The first column has 'Vendor name*' with the value 'Vendor 1'. The second column has 'Purchase order number*' with the value '123'. Below these, there are two more fields: 'Sales representative name*' with the value 'Salesman' and 'Sales representative e-mail*' with the value 'salesman@gmail.com'. The 'Delivery information' section has two date fields: 'Order date*' with the value '12/15/2025' and 'Delivery date*' with the value '12/16/2025'. Below the dates is a 'Notes' section with the text 'This is a note about this purchase order.'. At the bottom of the form, there is an 'Order' section with the instruction 'Build your purchase order by manually adding items or by choosing suggested items to get started.'. To the right of this section is an 'Add item' button with a dropdown arrow. At the very bottom of the form, there are three buttons: 'Cancel', 'Save & exit', and 'Send to vendor'.

Vendor and delivery information in PO

Step 3: Adding items to the PO

The items can be added to the PO in two methods:

- Using the **Add items** option to manually selecting the items from the vendor catalog.
- Using the **Add suggested items** option to allow the system automatically suggest the items. The system automatically adds items to the PO based on historical sales and forecasted demand methodology. The items in the vendor catalog are only suggested. See [Adding suggested items](#).

To add items manually:

1. Under the **Order** section, click **Add item**. The **Add item** sliding panel appears.
2. Select the **items** drop-down to view the list of vendor items available for selection from the vendor. Using this option, you can include the vendor items to the purchase order.

Alternatively, if any item must be included to the vendor catalog, use the **Open vendor catalog** option to view the existing vendor items and add any new items if required.

Close

Add item

* Indicates required fields

Item *

233 - 232
Case (cs) = 22/2 #10 Can (#10 can)

7728 test item - deeee
Case (cs) = 10/1 #60 Scoop (#60 scoop)

Open vendor catalog

Current on-hand: 0 Open POs: 0

Order quantity: 0

Price per unit: x \$0.00

Extended total: \$0.00

Cancel

Save

Option to view vendor catalog

Upon selecting the item, the **purchase unit** is automatically populated which is not configurable here. The purchase unit is configured in the 'Vendors' screen while configuring the vendor catalog. Additionally, the following details are auto-populated in disabled state:

Suggested qty — Subtracts the open POs and on-hand quantities and suggests you to apply a specified safety percentage to the order.

Required — Count of vendor items required.

Current on-hand — Count of vendor items currently in stock.

Open POs — Current open POs that contains the selected vendor item.

3. Enter the **quantity of items** required from the vendor. Upon entering the quantity, the following details appear:

Order quantity — The count of total items that is planned for ordering.

Price per unit — The unit price of each vendor item.

Extended total — The total cost of vendor items as per the required quantity.

Recent history — The recent purchase history (maximum of last four purchases) of the item appears in a table with the order date and ordered quantity details.

Close

Add item
* Indicates required fields

Item *
DNTDEV VI Tomatoes

Purchase unit *
CS=1 ea

Order quantity *
10

Suggested
0

Required
0

Current on-hand
80

Open POs
10

Order quantity	10
Price per unit	x \$10.00
Extended total	\$100.00

Order date	Quantity
11/24/2025	10

Cancel

Save

Adding items to PO

- Click **Save** to confirm adding the items to the purchase order. A confirmation message appears and the corresponding item appears under the **Order** section indicating the following:

Item code — Unique code of the item as configured in ASM.

Item name — Name of the item.

Purchase unit — Total units required.

Suggested qty — Subtracts the open POs and on-hand quantities and suggests you to apply a specified safety percentage to the order.

Order qty — Total quantity of items required.

Price — Unit price of an item.

Extended total — The total price of all units into consideration.

Order

Build your purchase order by manually adding items or by choosing suggested items to get started.

Add item

0 selected

Columns Filters Density Search...

<input type="checkbox"/>	Item code	Item name	Purchase unit	Suggested qty	Order qty	Price
<input type="checkbox"/>	DNTDEV VI Tomatoes	DNTDEV VI Tomatoes	CS=1 ea	0	10	\$10.00

Rows per page: 10 1-1 of 1

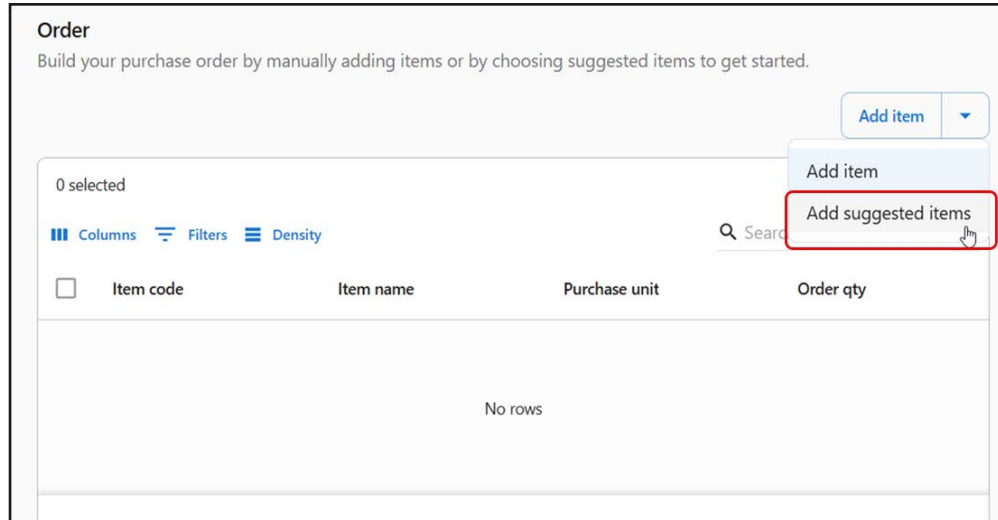
Cancel Save & exit Send to vendor

Added items

Once the items are added, you can send the PO to the vendor or save the PO in the system and send it later. For information, refer [Step 4: Sending PO to vendor](#).

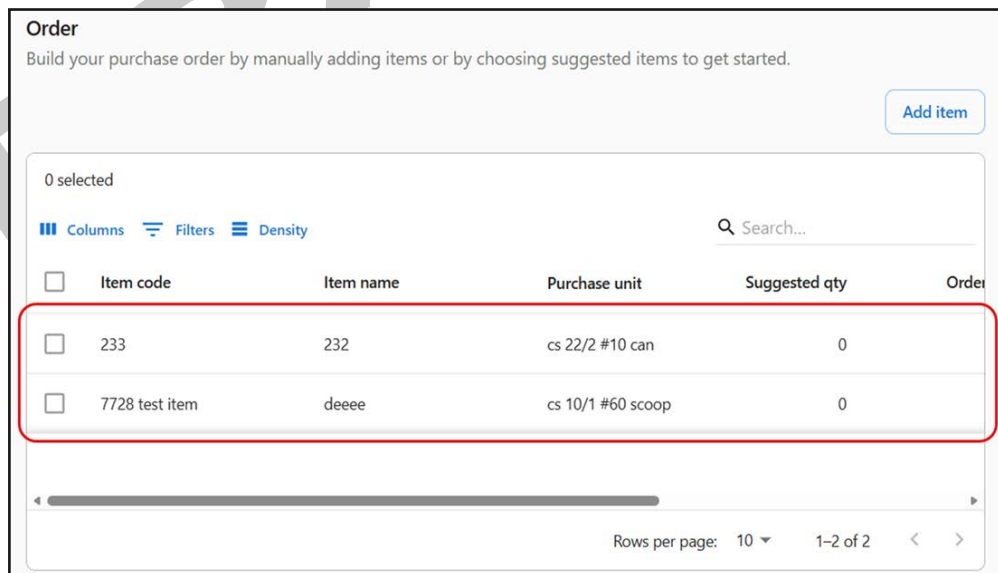
To add system suggested items:

1. Under the **Order** section, click the **Add item** drop-down and select **Add suggested items**.



Add suggested items option

The system automatically adds items to the PO based on historical sales and forecasted demand methodology. The items in the vendor catalog are only suggested. Only the item quantity is configurable.



System suggested items

2. (Optional) Select the **item** for which the quantity must be updated. The **Add item** sliding panel appears where you can enter the required **order quantity** and save the details.

Step 4: Sending PO to vendor

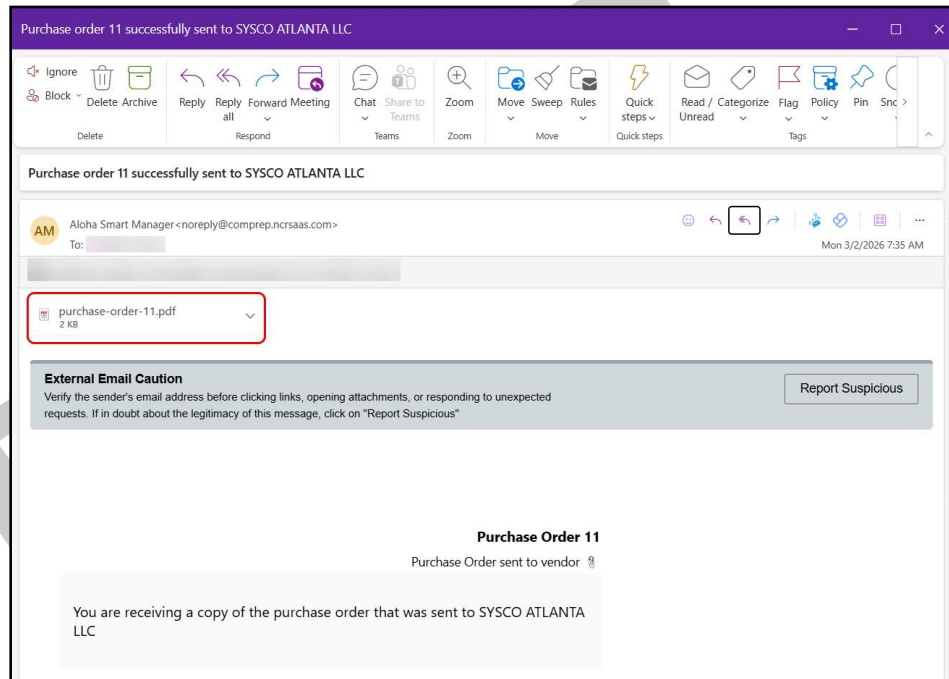
The purchase order can be sent to the vendor in two delivery methods: Email or EDI (Electronic Data Interchange). On selecting the **Send to vendor** option, the system prompts you to choose either **Email** or **EDI**. Upon selecting Email, the PO is sent via email to the vendor (see [Email](#)). On the other hand, upon selecting EDI, the PO is uploaded to the SFTP server of the vendor which is configured in the Vendors screen (see [EDI](#)).

Sending PO to vendor via email

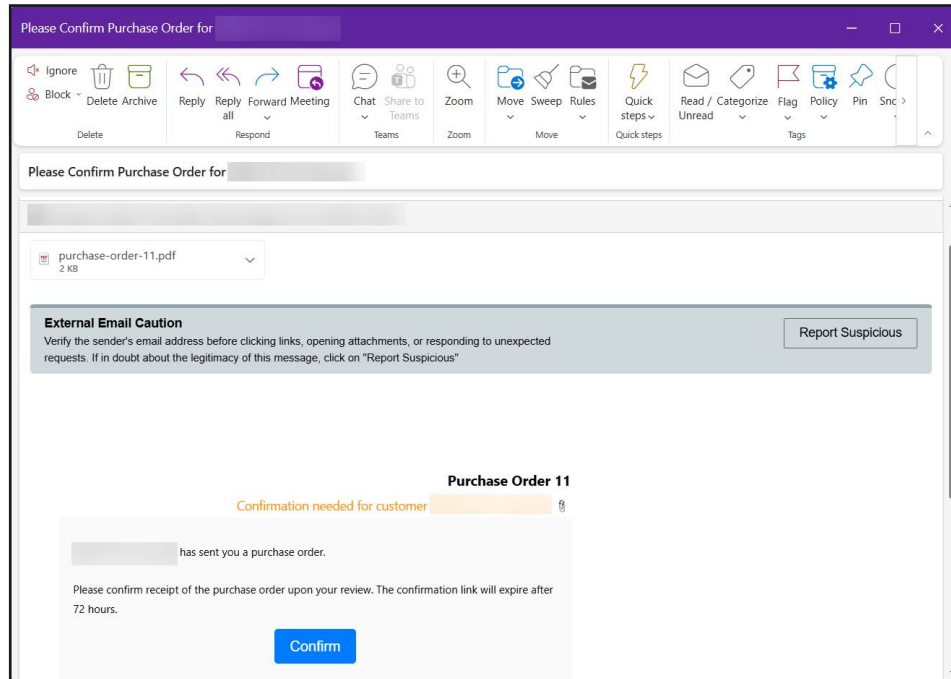
Aloha Smart Manager (ASM) provides an option to send the PO to vendors through email.

To send a PO through email:

1. Follow the steps in [Creating a purchase order](#).
2. Click **Send to vendor** in the Purchase order screen. The vendor receives an email on their registered email address with PO attachment.

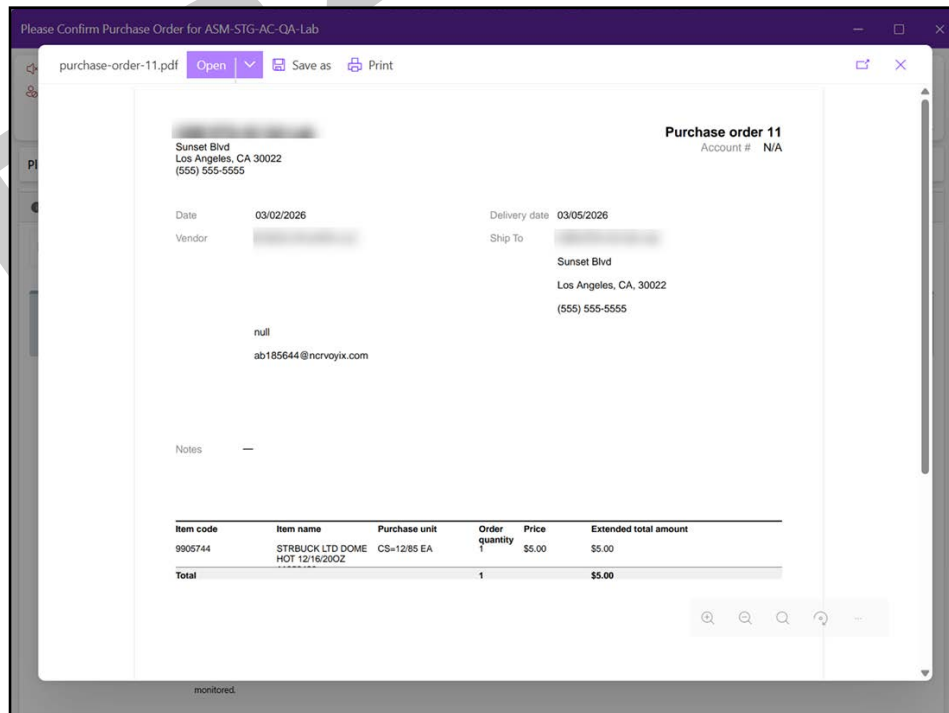


Sample PO email intimation with attachment



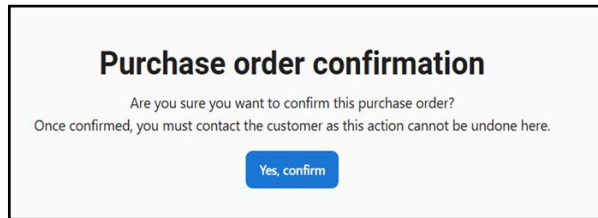
Sample PO confirmation email

The email has the attachment of the PO which the vendor must confirm.



Sample PO PDF attachment

The vendor must open the email, review the PDF attachment of the PO, and click **Yes, confirm**.

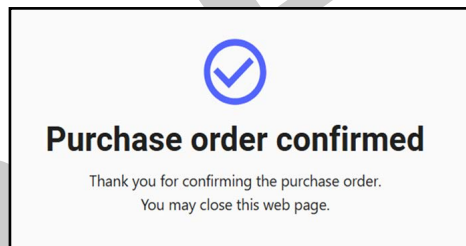


Sample PO confirmation message

 **Note**

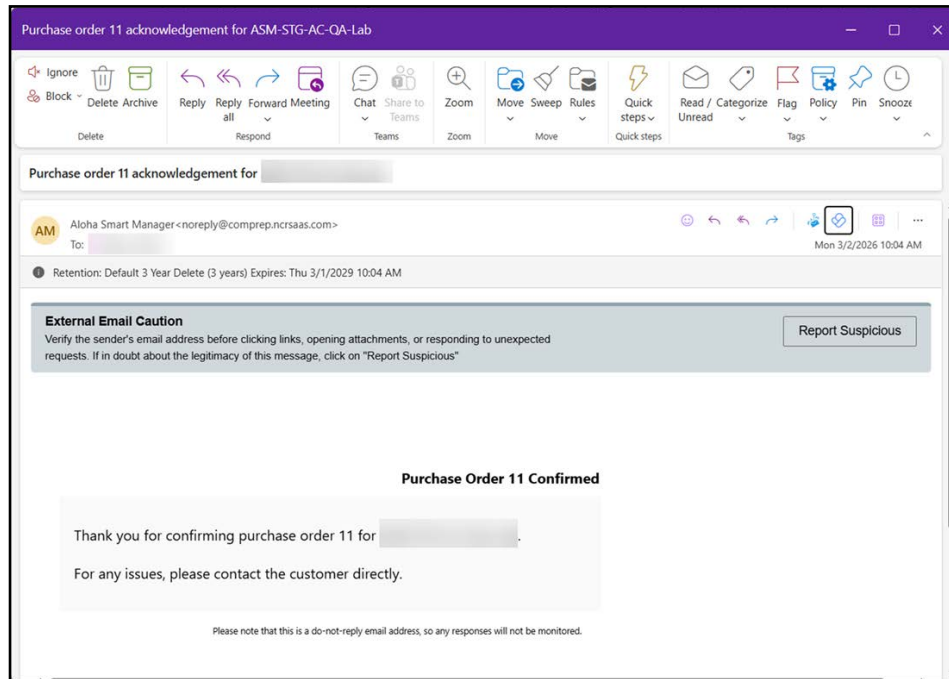
If the vendor fails to confirm the PO within 72 hours, the PO status changes to 'Unconfirmed'; the restaurant can later check with the vendor for not confirming the PO and resend the PO, if required.

Upon confirmation, an acknowledgment is sent to ASM and the status of the corresponding PO changes to 'Confirmed' in ASM. The 'Purchase order confirmed' message appears.



Sample PO confirmed message

Additionally, an acknowledgment email is sent to the restaurant to indicate that the vendor has confirmed the PO.

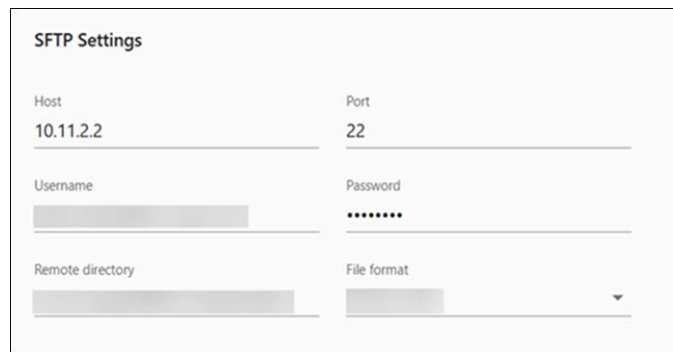


Sample PO confirmed acknowledgment

Sending PO to vendor via EDI

Aloha Smart Manager (ASM) uses Electronic Data Interchange (EDI) to send purchase orders directly to vendors. This communication is done using a secure FTP (sFTP) connection, which allows ASM and the vendor to exchange data safely and automatically. Using EDI with secure FTP reduces manual work, improves data accuracy, and ensures purchase orders are delivered to vendors quickly and reliably.

The FTP connection details for a vendor — such as their server address, credentials, and file location — must be configured in the 'SFTP Settings' of the Vendors screen to send POs through secured connection.



SFTP Settings	
Host	Port
10.11.2.2	22
Username	Password

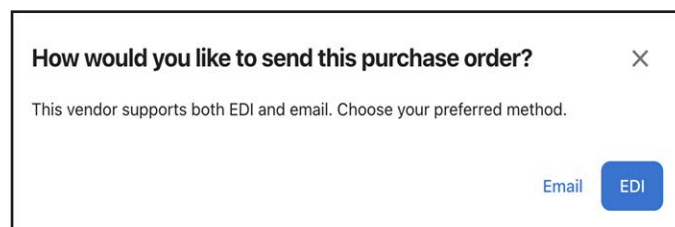
Remote directory	File format

SFTP settings in Vendors screen

Once the vendor is configured, you can create a PO and send it from ASM. When a PO is sent, ASM generates the order file in the required vendor format and uploads it to the vendor's secure FTP location.

To send a PO through secured connection:

1. Configure the SFTP settings in the 'Vendors' screen, see [SFTP settings](#).
2. Follow the steps in [Creating a purchase order](#) to create a PO against the vendor for which the SFTP connection was configured.
3. Click **Send to vendor** in the Purchase order screen. The system prompts to select **Email** or **EDI**.



How would you like to send this purchase order? ×

This vendor supports both EDI and email. Choose your preferred method.

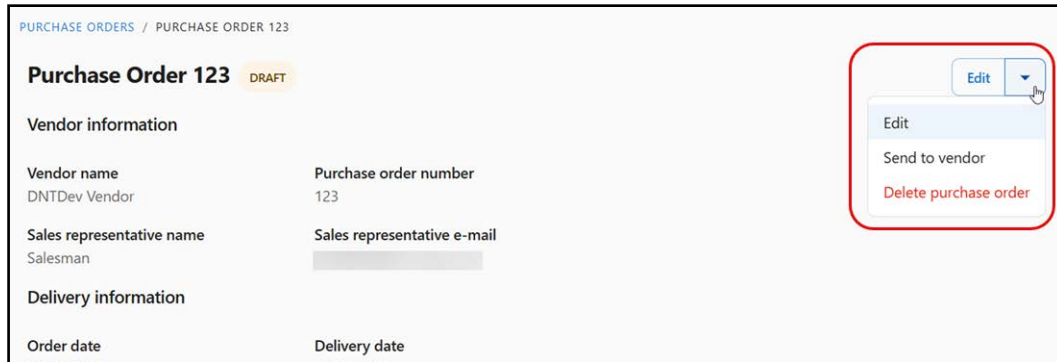
Email **EDI**

EDI option to send PO to vendor

4. Click **EDI**. The PO file is now successfully uploaded to the SFTP server. The PO status appears as 'Confirmed' in the purchase order main screen.

Working with a draft PO

The PO that are saved and not sent to the vendor are in 'Draft' status, which can be sent to a vendor using the **Send to vendor** option. Before sending, you can also edit the PO detail using the **Edit** option. Alternatively, if you want to delete a draft PO, you can use the **Delete purchase order** option to delete the PO from the system.



Options to work with Draft PO

To send a PO in 'Draft' status to the vendor:

1. Select an existing **PO** from the Purchase orders screen.
2. Click the **Edit** drop-down at the top-right corner.
3. Select **Send to vendor**.

To edit a PO in 'Draft' status:

1. Select an existing **PO** from the Purchase orders screen.
2. Click the **Edit** option at the top-right corner.
3. Update the PO details and either send the PO to vendor or save again as draft.

To delete a PO in 'Draft' status:

1. Select an existing **PO** from the Purchase orders screen.
2. Click the **Edit** drop-down at the top-right corner.
3. Select **Delete purchase order**.
4. Click **Delete** to confirm the deletion of PO.

Viewing an existing purchase order

All the available purchase orders are available in the Purchase orders screen. You can select a specific PO to view the order in detail, such as vendor information, delivery details, and order details.

To view an existing purchase order:

1. Select **Inventory > Purchase orders**. The Purchase orders screen appears.
2. Select a **purchase order**. The detailed view of the corresponding PO appears. Additionally, the current status of the PO appears next to the PO name.
3. Select a **specific item** to open a sliding panel and view the items available in the order.

DRAFT

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.

Additionally, managers can use the 'Invoice history report' to run reports and keep track of all invoices.

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:

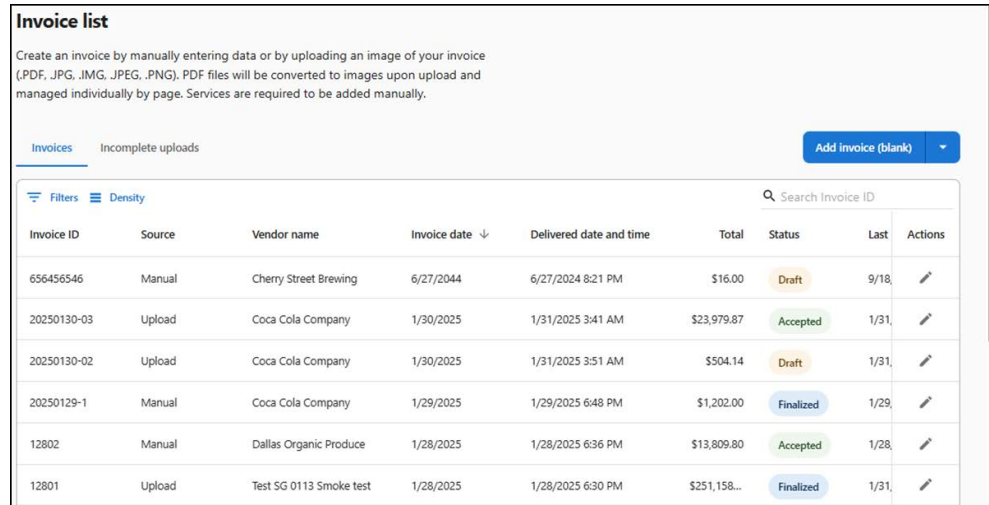
- Manually adding the invoice details. See [Manually adding an invoice](#).
- Uploading a digital image of the invoice. If you upload a PDF, each PDF page is converted to an image file. See [Appendix B: Uploading an invoice](#).

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.

To manually add an invoice:

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



Invoice list

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

Invoices Incomplete uploads Add invoice (blank)

Filters Density Search Invoice ID

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

'Invoice list' screen

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

Invoice details

* Indicates required fields

Invoice information

Invoice date *
09/18/2025

Invoice delivery date and time *
09/18/2025 05:54 PM

Invoice ID *

Invoice comments

Vendor information

Vendor name *

Cash paid in

Cash paid out

Add item

Filters Density Search...

Item / Service	Item code	Name / Description	Receive unit	Quantity	Price	Subto	Actions
No rows							

Back

'Invoice details' screen

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

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

The screenshot shows the 'Invoice information' section of a form. It includes fields for 'Invoice date*' (02/05/2025), 'Invoice delivery date and time*' (02/05/2025 12:05 PM), 'Invoice ID*' (359), and 'Invoice comments'. Below this is the 'Vendor information' section with a 'Vendor name*' field. A dropdown menu is open, showing a list of vendors: 'bgjhfhk', 'Cherry Street Brewing', 'Coca Cola Company', 'Dallas Organic Produce', 'Node js test vendor (imported)', 'Smoke Test 01', 'test', and 'test0808'. To the right of the dropdown is an 'Add item' button. Below the dropdown is a search bar with a magnifying glass icon and the text 'Search...'. At the bottom right of the form is a 'Back' button.

Adding or selecting a vendor

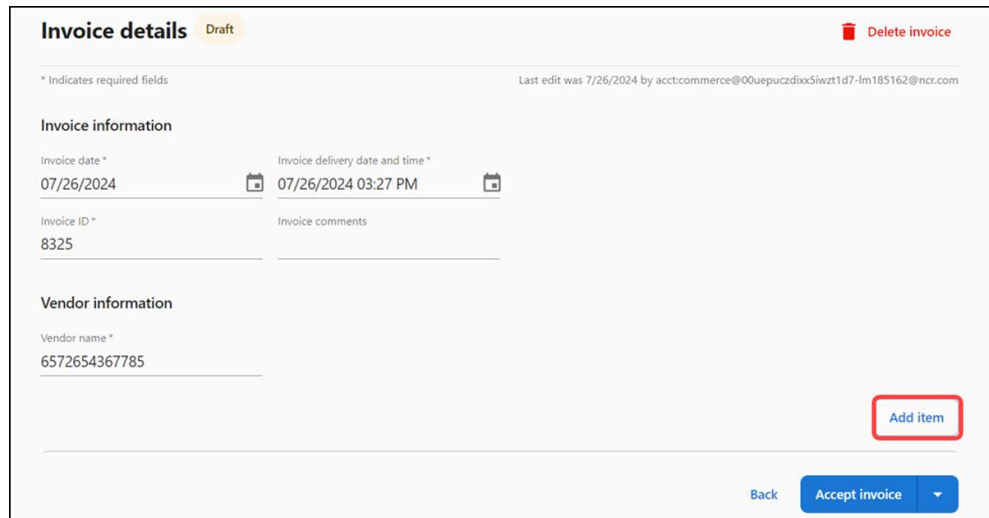
7. Click **Vendor name** to view a list of vendors.
8. Select a **vendor** from the list. Alternatively, if the required vendor is not listed, enter the **new vendor name** in 'Vendor name.' The Add <New vendor name> option appears. Click **Add** to create a new vendor.

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

The screenshot shows the 'Invoice details' section of a form. The status is 'Draft' with a red arrow pointing to it. There is a 'Delete invoice' button with a trash icon. Below this is the 'Invoice information' section with fields for 'Invoice date*' (07/26/2024), 'Invoice delivery date and time*' (07/26/2024 03:27 PM), 'Invoice ID*' (8325), and 'Invoice comments'. Below this is the 'Vendor information' section with a 'Vendor name*' field containing '6572654367785'. At the bottom right, there are two buttons: 'Accept invoice' and 'Finalize invoice', both highlighted with a red box. Below these buttons is a 'Back' button and a blue 'Accept invoice' button with a dropdown arrow.

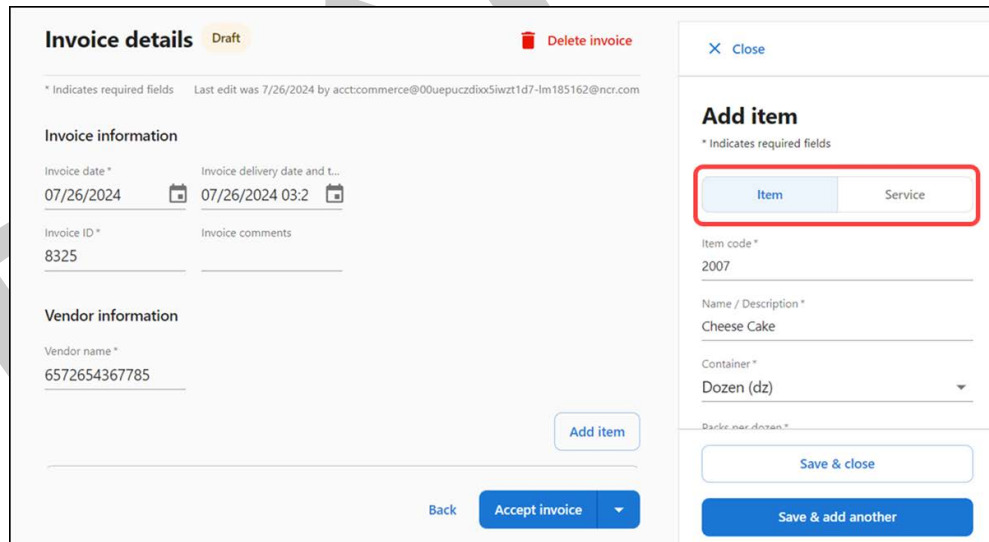
Invoice record saved as Draft

9. Click **Add item** to manually enter the first item in the invoice.



Option to add an item to the invoice

The **Add item** sliding panel 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. Select or type the **vendor item code**, up to 50 characters. On selecting the **Item code** drop-down list, the available items for that vendor appears.

12. Upon selecting the item code, the following details are auto-populated:

Name/Description — The name and description of the item.

Container — The bulk packing type indicating whether it is a Case (CS), Pail (PL), Bag (BG), Pound (LB), Gallon (GL), Half Gallon (HGL), Quart (QT), Liter (LT), Pint (PT), and Dozen (DZ).

Packs per — The total quantity of packs in vendor item container.

Size — The actual size of each unit in the package.

Unit — 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).

13. Select the **location** where the item must be stored. The available storage locations at the store/restaurant are defined in the **Locations** screen, see [Managing the inventory locations](#).

14. Type the **quantity of item received** from the vendor.

15. 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.

16. 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.

Close

Add item

* Indicates required fields

onionpowder (in catalog) ✕

Item	Item code:
	onionpowder
Container:	Pack:
Case (cs)	10
Size:	Unit:
1	Kilogram (kg)

Locations

Dry Storage ✕

Received quantity *

1

Number of cases received

Price *

\$ 10

Save & close

Save & add another

Adding items to invoice

17. 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.

18. Repeat the above steps for all items and services to be included as per the invoice. The subtotal, sales tax, and amount payable appear at the bottom.

The screenshot shows a table with columns: Item / Service, Item code, Name / Description, Receive unit, Quantity, Price, Subtotal, and Actions. One row is visible: Item 2007, Cheese Cake, Dozen=1/1 ea, 10, \$2.00, \$20.00. Below the table is a summary box with Subtotal \$20.00, Sales tax \$1.00, and Amount payable \$21.00. At the bottom right, there are 'Back' and 'Accept invoice' buttons.

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

Subtotal \$20.00
Sales tax \$1.00
Amount payable \$21.00

Back Accept invoice

Added invoice items and services

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

The screenshot shows the 'Invoice details' page with a status of 'Accepted'. It includes fields for Invoice information (date, delivery date, ID, comments) and Vendor information (name). At the bottom right, there are 'Back' and 'Finalize invoice' buttons.

Invoice details Accepted

Invoice information

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

Invoice ID * 8325 Invoice comments

Vendor information

Vendor name * 6572654367785

Back Finalize invoice

Accepted invoice

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

The screenshot shows the 'Invoice details' page with the status 'Finalized' highlighted in a red box. The page includes a 'Delete invoice' link, a note about required fields, and sections for 'Invoice information' and 'Vendor information'. The 'Invoice information' section contains fields for 'Invoice date *' (07/26/2024), 'Invoice delivery date and time *' (07/26/2024 03:27 PM), 'Invoice ID *' (8325), and 'Invoice comments'. The 'Vendor information' section contains a 'Vendor name *' field with the value 6572654367785. At the bottom right, there are 'Back' and 'Unfinalize invoice' buttons, and an 'Add item' button is visible above them.

Finalized invoice



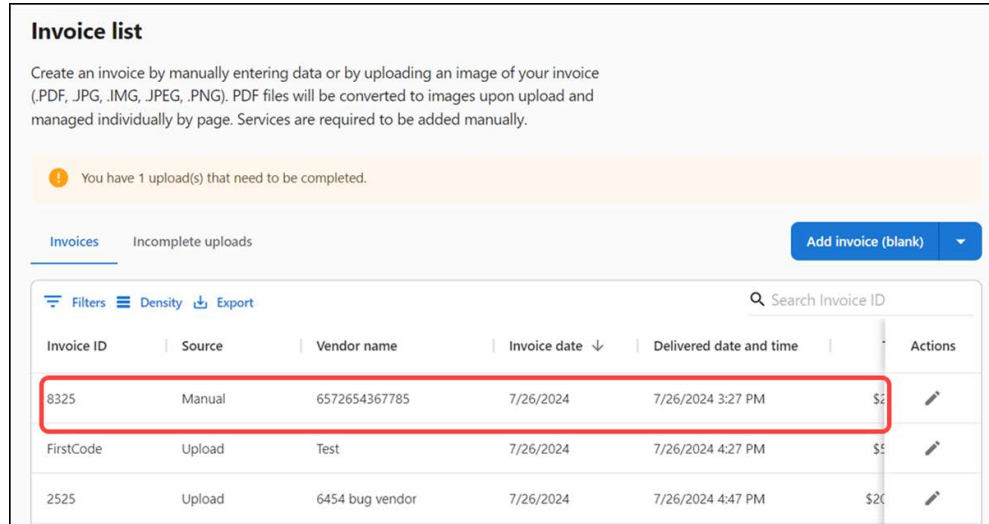
Note

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

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

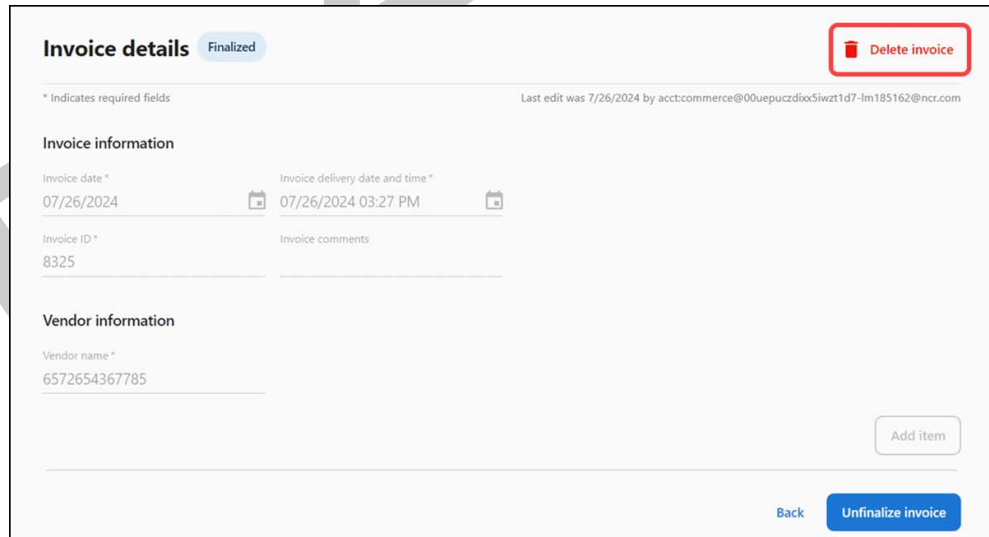
Deleting an invoice

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



'Invoice list' screen

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



'Invoice details' screen

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

Counting inventory and managing locations

Effective inventory control is essential for restaurant operations, and it begins with accurate inventory counting at different locations at the store. This feature allows managers and employees to perform real-time inventory counts directly from designated storage areas — such as walk-ins, dry storage, or bar stations — ensuring that stock levels are recorded precisely where items are stored and used.

The Inventory counting and location management greatly enhances the efficiency and accuracy of tracking inventory in your store. This helps in tracking the exact amount of stock available at the store.

Managers can use the 'Counting and locations' feature to:

- Maintain a list of inventory items at a store (see [Maintaining the inventory list](#))
- Manage the inventory items at a location in the store (see [Managing the inventory locations](#))
- Count and post the count of inventory items (see [Counting and posting the inventory](#))

Maintaining the inventory list

Use the 'Inventory list' option to define count frequencies and to set parameters for the inventory posting process. The frequency of schedules to count the inventory item includes:

Shift — Inventory count for each shift.

Daily — Inventory count for each day.

Weekly — Inventory count for each week.

Fiscal Period — Inventory count for a fiscal period.

Unassigned — Inventory items that are not counted and not assigned to any location. The items that contain one or more inventory units appear under 'Unassigned.'

To update the inventory list:

1. Select **Inventory > Counting and locations > Inventory lists**. The Inventory list screen appears with the inventory list frequency, inventory count for that frequency, and an option to update the frequency of the items.

The screenshot shows the 'Inventory lists' interface. At the top, it says 'View the summary of your inventory lists'. Below this is a table with three columns: 'List name', 'Item count', and 'Actions'. The table contains five rows: 'Shift' with 59 items, 'Daily' with 2 items, 'Weekly' with 69 items, 'Fiscal Period' with 59 items, and 'Unassigned' with 3,295 items. Each row has an edit icon in the 'Actions' column. The interface also includes a search bar, 'Columns', 'Filters', and 'Density' options, and a pagination control at the bottom right showing 'Rows per page: 10' and '1-5 of 5'.

List name	Item count	Actions
Shift	59	
Daily	2	
Weekly	69	
Fiscal Period	59	
Unassigned	3,295	

Inventory lists

List name — Frequency at which the counting must be scheduled.

Item count — Number of inventory items scheduled for counting.

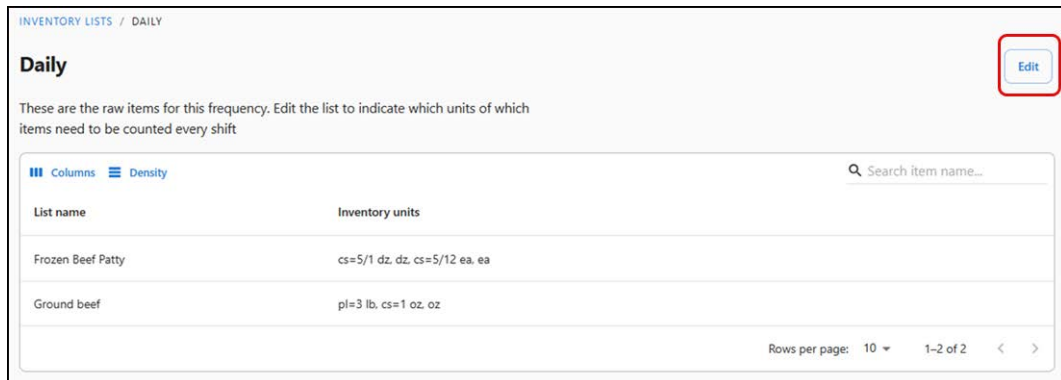
Actions — Option to update (add or remove) the inventory items from counting.

2. Perform one of the following to update the inventory list:

- Click the **pencil icon**.

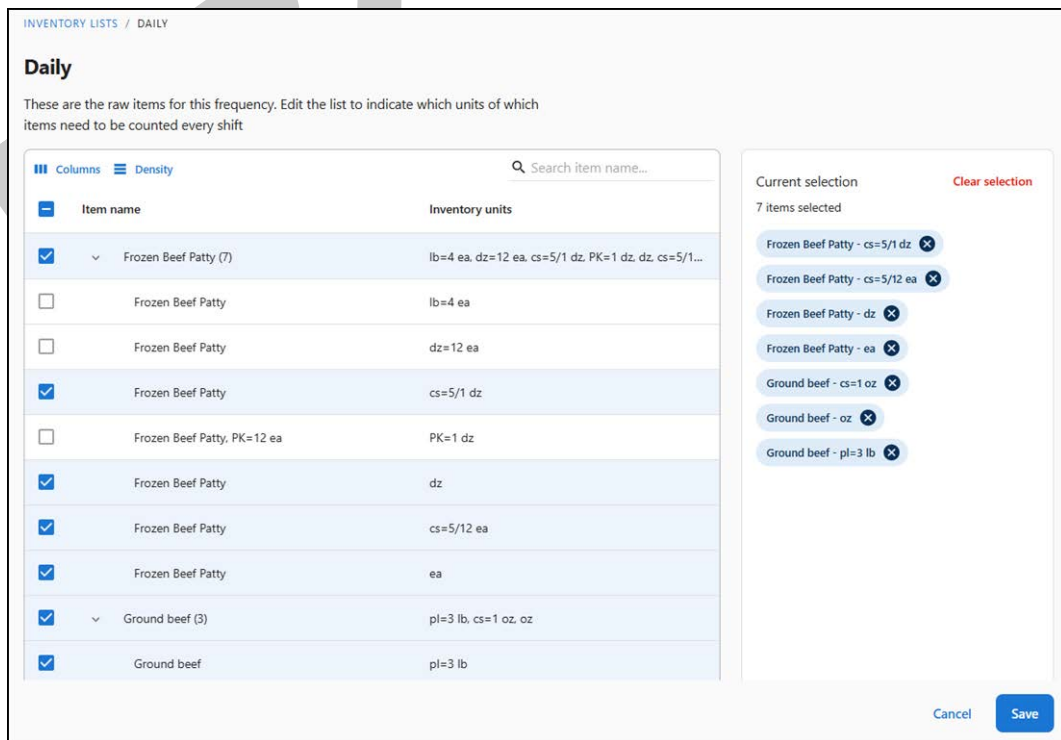
-OR-

- Select a **list name** to view the exact item(s) counted for that frequency including the inventory name and its unit of measure. Click **Edit**.



Option to edit inventory list

The following screen appears. The inventory items that are set to count for the corresponding frequency is already selected and the items that are not part of the counting are not selected.



Setting the frequency to count an inventory item

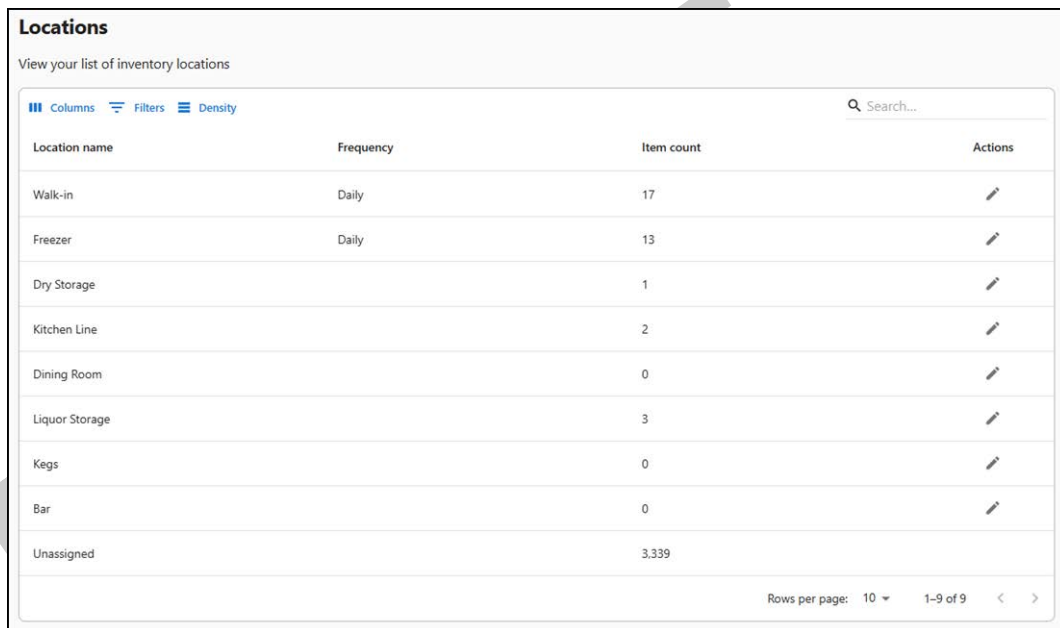
3. Select or clear the items to update the counting of the inventory item.
The selected items are counted as per the scheduled frequency and the cleared (not selected) items are ignored. The inventory items selected for counting appear under the **Current selection** section.
4. Click **Save** to confirm the changes.

Managing the inventory locations

Use the 'Locations' option to define or maintain physical storage locations. Creating storage locations allows you to assign raw items and prep items to be stored and counted in each location.

To manage the locations:

1. Select **Inventory > Counting and locations > Locations**. The **Locations** screen appears.



The screenshot shows the 'Locations' screen with the following table:

Location name	Frequency	Item count	Actions
Walk-in	Daily	17	
Freezer	Daily	13	
Dry Storage		1	
Kitchen Line		2	
Dining Room		0	
Liquor Storage		3	
Kegs		0	
Bar		0	
Unassigned		3,339	

At the bottom of the table, there is a pagination control: 'Rows per page: 10' and '1-9 of 9'.

Available locations

Location name — Specific place at the store where the inventory is stored.

Frequency — Routine during which the inventory count must be recorded.

Item count — Count of inventory item stored at the location.

Actions — Option to update the inventory list at the location.

2. Select a **location name** to view the exact item(s) stored at that location and its count. For instance, if the store stores sliced ham in a freezer, on selecting the location name, you can view the sliced ham item and its count (Inventory units).



Tip

Alternatively, if you want to go back to the locations main screen, select the **Locations** menu.

LOCATIONS / FREEZER

Freezer

These are the raw items (in order) for this location. Edit the list, change the order, or duplicate an item if its stored in several places in this location. Preview the location to make sure everything appears correctly.

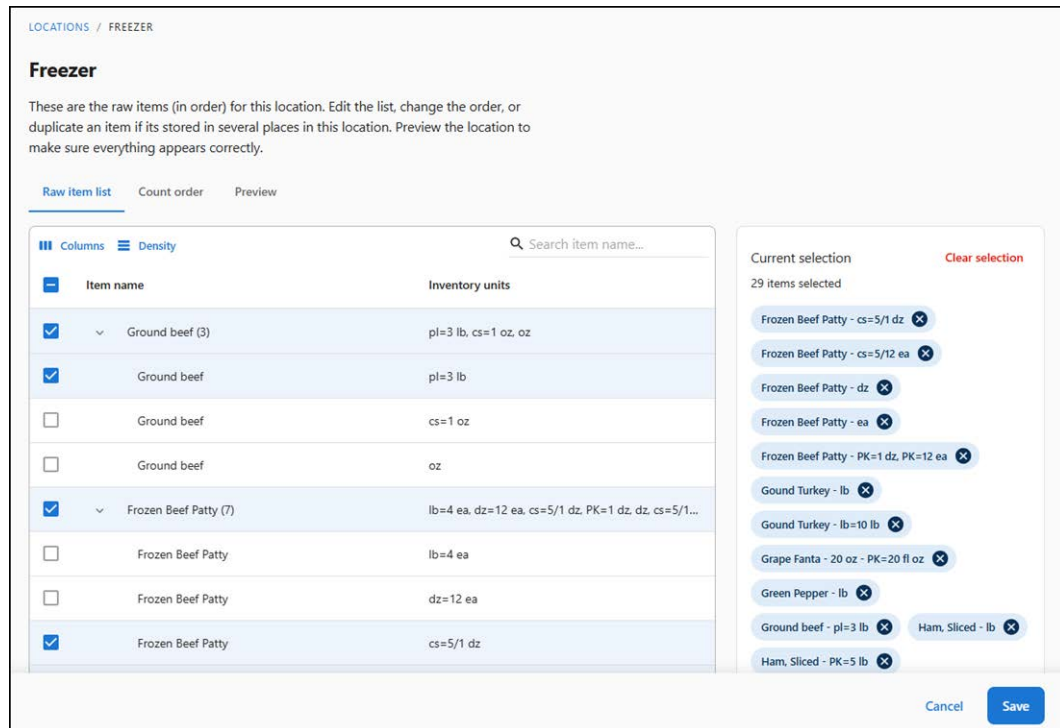
[Raw item list](#) [Count order](#) [Preview](#)

Columns Density Search item name...

Item name	Inventory units
Ground beef	pl=3 lb, cs=1 oz, oz
Frozen Beef Patty	lb=4 ea, dz=12 ea, cs=5/1 dz, PK=1 dz, dz, cs=5/12 ea, PK=12 ea, ea
Ham, Sliced	PK=5 lb, lb
New-Chicken	PK=10 kg, cs=9/10 lb, PK=10 lb, lb, cs=10/100 lb, PK=100 lb, PK=88 lb
New-Chicken, Breast	cs=10/100 lb, PK=100 lb, lb, PK=430 dz
New-"Chicken Meat"	pl=11/1 L, PK=1 L, L

Inventory items set for counting - Location view

- Click **Edit** at the top-right corner to view the items list at the location in detailed and edit if required. The **Raw item list** screen appears by default.



Viewing raw item list

Item name — Items stored at the location. As per the above figure, the items are stored in the freezer.

Inventory units — Units of measure of the corresponding items stored in the location. For example, as per the above figure, five packets of sliced ham is stored in the freezer.

- Select or clear the **items** to update the list of inventory items available at the location. The selected items are counted and stored at selected location whereas the cleared (not selected) items are not counted or stored. The inventory items stored at the selected location appear under the **Current selection** section.
- Click **Save** to confirm the changes.
- Click **Edit** at the top-right corner.

- Click **Count order**. The details in the **Count order** tab appear.

Freezer

These are the raw items (in order) for this location. Edit the list, change the order, or duplicate an item if its stored in several places in this location. Preview the location to make sure everything appears correctly.

Raw item list Count order Preview

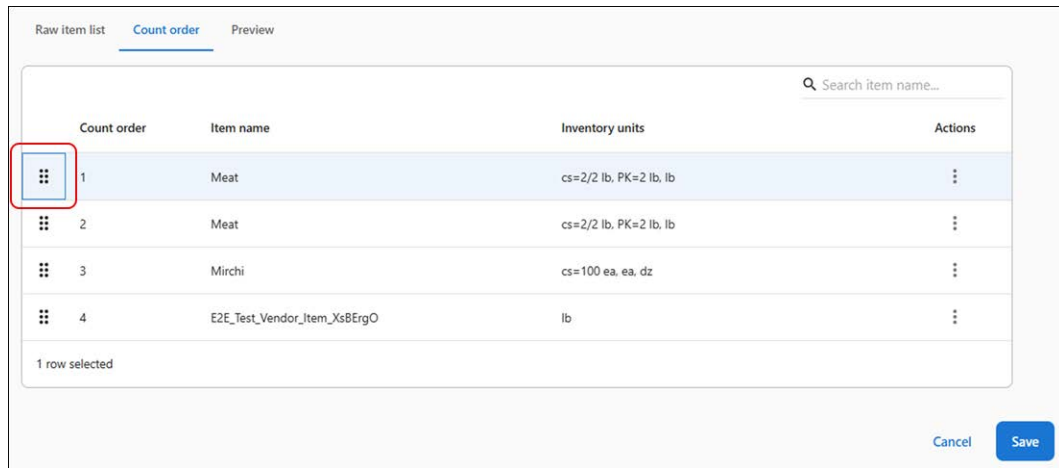
Count order	Item name	Inventory units	Actions
1	Ground beef	pl=3 lb, cs=1 oz, oz	⋮
2	Frozen Beef Patty	lb=4 ea, dz=12 ea, cs=5/1 dz, PK=1 dz, dz, cs=5/12 ea, PK...	⋮
3	Ham, Sliced	PK=5 lb, lb	⋮
4	New-Chicken	PK=10 kg, cs=9/10 lb, PK=10 lb, lb, cs=10/100 lb, PK=100 L...	⋮
5	New-Chicken, Breast	cs=10/100 lb, PK=100 lb, lb, PK=430 dz	⋮
6	New-"Chicken Meat"	pl=11/1 L, PK=1 L, L	⋮
7	Smoke Test	oz	⋮
8	Mustard Green	PK=10 ea, PK=6 lb, lb	⋮
9	Grape Fanta - 20 oz	PK=20 fl oz	⋮

Cancel Save

Viewing the count order

- Perform the following actions as required to rearrange the order in which the list of items must appear for counting in the 'Inventory count' screen:

- If you want to rearrange the items according to sheet-to-shelf sequence, click and drag the **double three dots** icon and arrange the items.



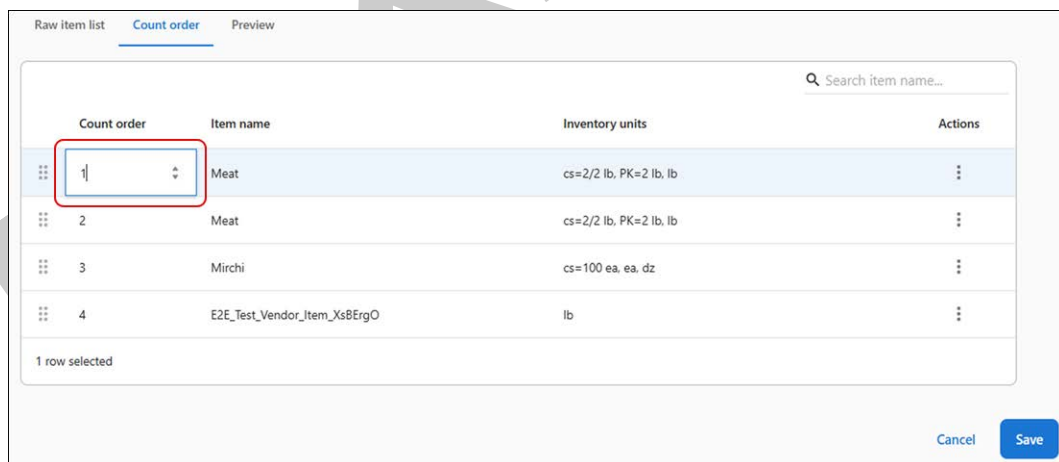
Count order	Item name	Inventory units	Actions
1	Meat	cs=2/2 lb, PK=2 lb, lb	⋮
2	Meat	cs=2/2 lb, PK=2 lb, lb	⋮
3	Mirchi	cs=100 ea, ea, dz	⋮
4	E2E_Test_Vendor_Item_XsBErgO	lb	⋮

1 row selected

Cancel Save

Drag and drop option

- If you want to manually type the sequence order, click the **count order** option and type the sequence count.



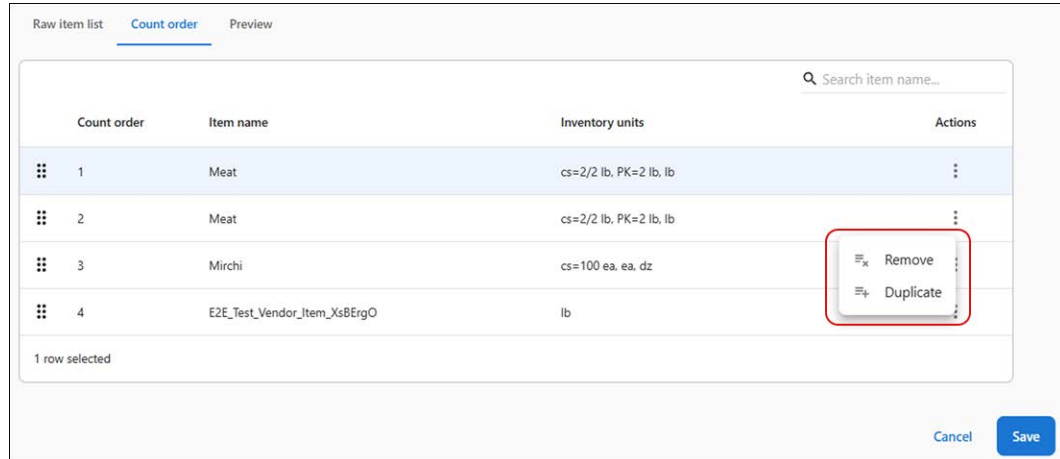
Count order	Item name	Inventory units	Actions
1	Meat	cs=2/2 lb, PK=2 lb, lb	⋮
2	Meat	cs=2/2 lb, PK=2 lb, lb	⋮
3	Mirchi	cs=100 ea, ea, dz	⋮
4	E2E_Test_Vendor_Item_XsBErgO	lb	⋮

1 row selected

Cancel Save

Manual entry of count order

9. If you want to duplicate or remove an item, click the **three dots** icon. The option to remove or duplicate a specific item appears. If you remove or duplicate an item, click **Save** to confirm the changes.



Remove and Duplicate options

10. Click **Save** to confirm the changes.
11. Click **Edit** at the top-right corner.

12. Click **Preview** to view the final list of inventory items at each location available at the store.

LOCATIONS / FREEZER

Freezer

These are the raw items (in order) for this location. Edit the list, change the order, or duplicate an item if its stored in several places in this location. Preview the location to make sure everything appears correctly.

Raw item list Count order Preview

Ground beef

pl=3 lb

cs=1 oz

oz

Frozen Beef Patty

lb=4 ea

dz=12 ea

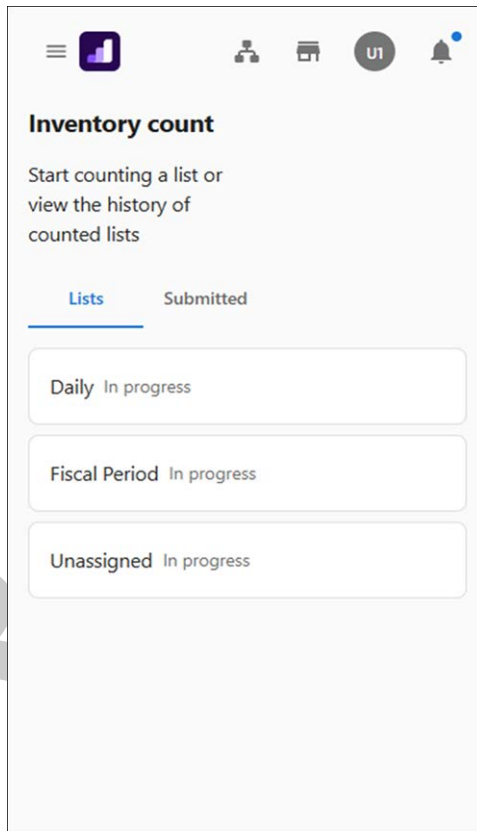
cs=5/1 dz

PK=1 dz

Preview of items at a location

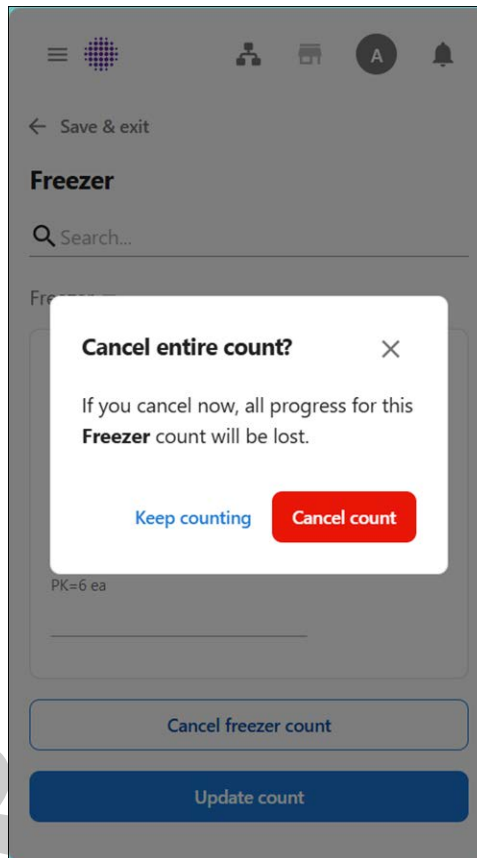
Counting and posting the inventory

Use the 'Inventory count' option to record the physically counted stock of inventory items at their store. The counted values can be recorded using a smartphone. Record the inventory items at the beginning or end of a day, week, or fiscal period. In the case the manager wants to count the items during a shift, the manager can record the count by specifying the exact date and time of the shift. A manager can also record the count of unassigned items.



Inventory count

During inventory counting, you can cancel the current counting at any time and restart the process from the beginning. All the entered data will be discarded on cancellation.

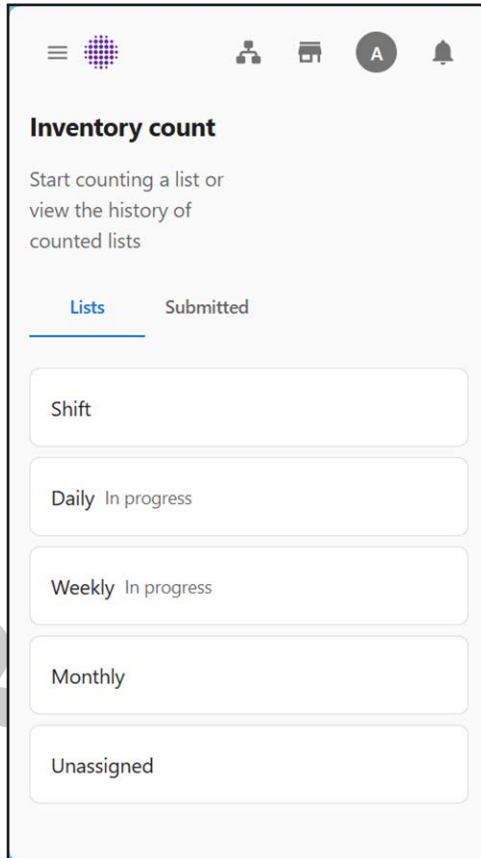


Canceling the entire count

To count and post the inventory item:

In the following instructions, the counting of inventory for the day (Daily) is explained.

1. Select **Inventory > Counting and locations > Inventory count**. The **Inventory count** screen appears.



Inventory count

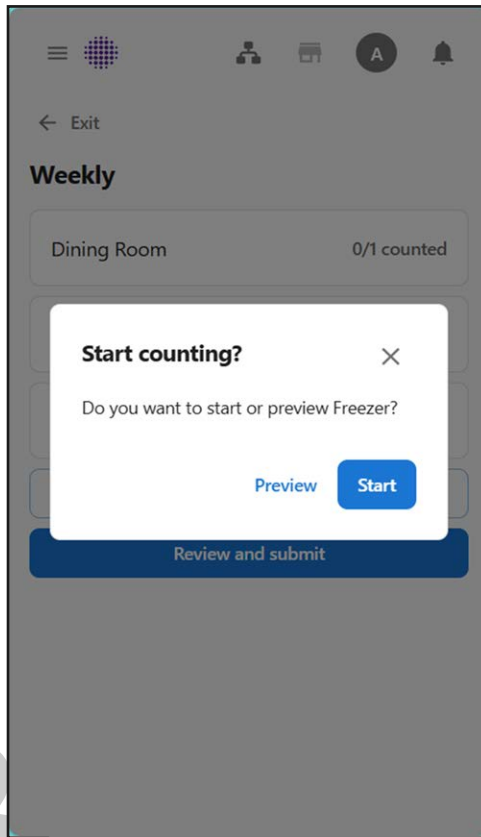
2. Under 'Lists', select **Daily**. The locations for which the frequency of counting is set as 'Daily' appears. The total number of inventory items at the location appears. In the below figure, for the

'Freezer' location, the total inventory items to count is three with zero counted out of three.

The screenshot shows a mobile application interface for inventory management. At the top, there is a navigation bar with a menu icon, a user profile icon, a document icon, a circular icon with the letter 'A', and a notification bell icon. Below the navigation bar is a back arrow and the text 'Exit'. The main heading is 'Weekly'. There are three input fields for different locations, each with a 'counted' status: 'Dining Room' (0/1 counted), 'Freezer' (0/3 counted), and 'Kitchen Line' (0/9 counted). Below these fields are two buttons: a light blue 'Cancel' button and a dark blue 'Review and submit' button.

Select location to count and post

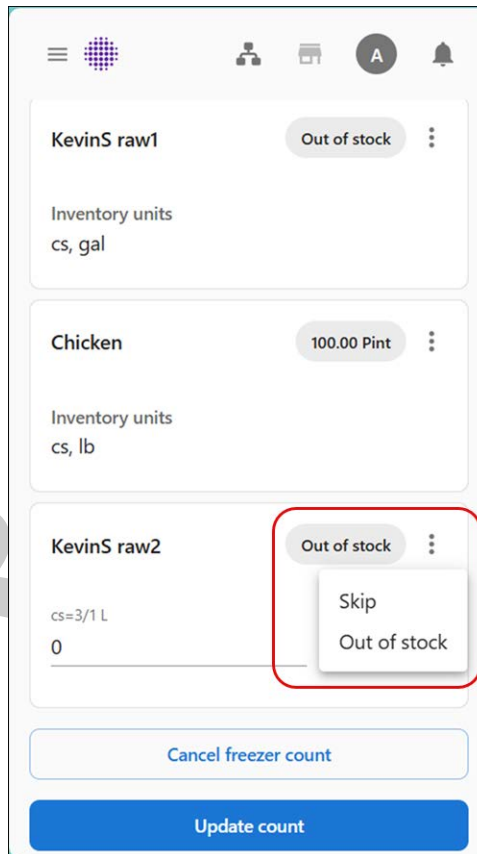
3. Select the inventory **location** to count. A pop-up message appears to start the counting or preview the locations before counting.



Start or preview the count

4. Click **Start**. The counting for the selected location appears, for example: Freezer.

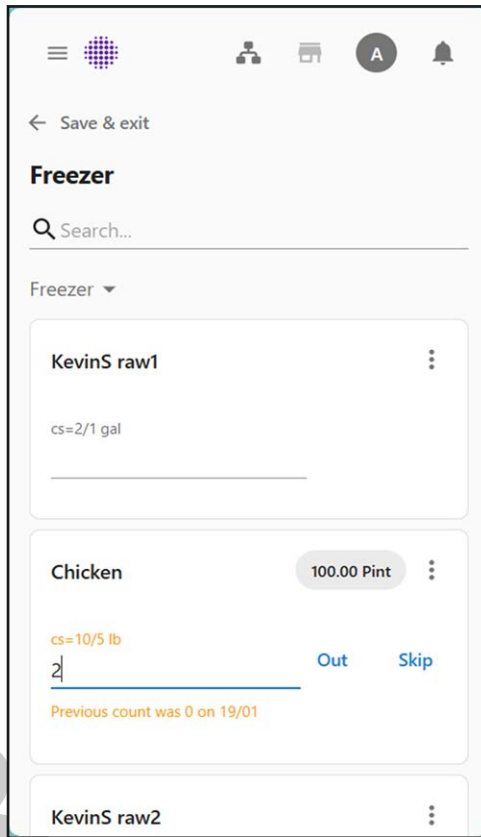
5. Click the tile to enter the **actual count of inventory items**. The following indications appear when you click the options to enter the count:
 - The options to specify an item is **out of stock** or to **skip** the counting of an item. You can also click the three-dotted icon to view the **Out of stock** and **Skip** options.
 - Use the **Out of stock** option to specify the inventory item is out of stock. The 'Out of stock' indication appears if the count is '0'.
 - Use the **Skip** option to bypass the entry of a count for the inventory item.



Option to set availability

- The system auto-calculates the unit of measure of the inventory item and the result appears next to the inventory item name. Additionally, the unit of measure appears to easily understand the conversion details.

- The previously counted values appear below each option. For example, 'Previous count was 0 on 19/01' indicates the previous counted entry was zero and it was posted on 19th January.



Entering count values

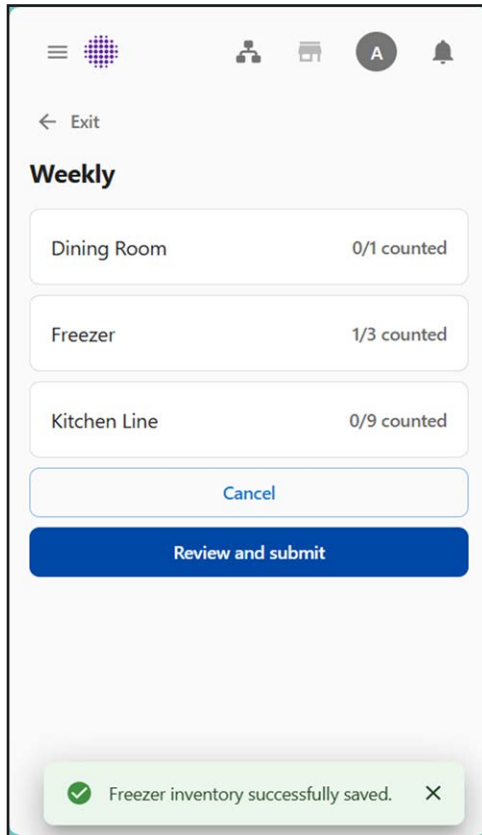
Tip

Click **Save & exit** (at the top) to close the screen to save the entered details and revisit again to update the count later. The count is not posted. A success message of saving the details appear.

6. Click **Update count** (scroll to bottom) to confirm the count of inventory items at the location.

Note

Upon clicking **Cancel freezer count**, all the counted data that you have entered will be lost and you need to start the counting from beginning.



Review and submit option

7. Click **Review and submit**.

The pop-up window with the option to review and submit the details for posting appears:

Weekly count summary

Submitted by [redacted] on 3/16/2026

Effective on*
Beginning of day

Expected inventory value	\$0.00
Actual inventory value	\$500.00
Difference	--

⚠ Skipped items 10

Out of stock items 2

Counted items 1

Total items 13

[Go back and edit](#)

[Save & exit](#)

[Post for review](#)

Count summary at the location

Effective on — Period of the day, either beginning or end of day, when the count was posted.

Expected inventory value — The total monetary value of inventory items that the system expects to be on hand before counting, based on recorded stock levels and item costs.

Actual inventory value — The total monetary value of inventory items that are physically counted, calculated using the counted quantities and item costs.

Difference — Variance between the expected inventory value and the actual inventory value.

Skipped items — Number of inventory items at the location that were not counted.

Out of stock items — Number of inventory items at the location that were marked as out of stock.

Counted items — Number of inventory items at the location that were counted and the corresponding values were entered in the system.

Total items — Grand total of the inventory items at the location.

8. Perform **one** of the following actions:

- Click **Go back and edit** to close the pop-up window without saving the details. The count is not posted.
- Click **Save & exit** to save the details but do not post the count.
- Click **Post for review** to save and post the count instantly. The counted details is sent to the manager for approval. The counted details appear under the **Submitted** tab for review. For information about the submitted inventory count, see [Posting the inventory count](#).

Posting the inventory count

The counted inventory list appears under the **Submitted** tab in a tile format. The lists under the 'In review' section awaits manager's approval. The Managers can review the counted list and finalize it. Likewise, administrator can unfinalize a list, if required.

Filter options

Use the following filter options to locate the required counting list:

Status — Retrieve the counting list based on the current status of approval:

In review — Counted inventory items waiting for manager's approval. Manager can use the **Finalize** option to approve.

Finalized — Reviewed and approved by the manager.

Unfinalized — Reviewed and finalized; however, the administrator opted to unfinalize the already finalized list. You can review the list and finalize it again.

Date — Retrieve the counting list for a specific period.

Value — Retrieve the counting list based on the counted value.

Skipped — Retrieve the counting list based on inventory items skipped percentage.

Counting list details

All the inventory items that are counted and posted appear under the 'Submitted' tab with the following details:

Period — Time frame when the counting occurred.

Locations — Number of locations available to count.

Counted on — Date and time when the counting occurred.

Counted by — Employee who counted the inventory items.

Approved by — Manager who approved the counting. This option appears for finalized list only.

Counted value — Total value of the counted items. You have an option to update the values.

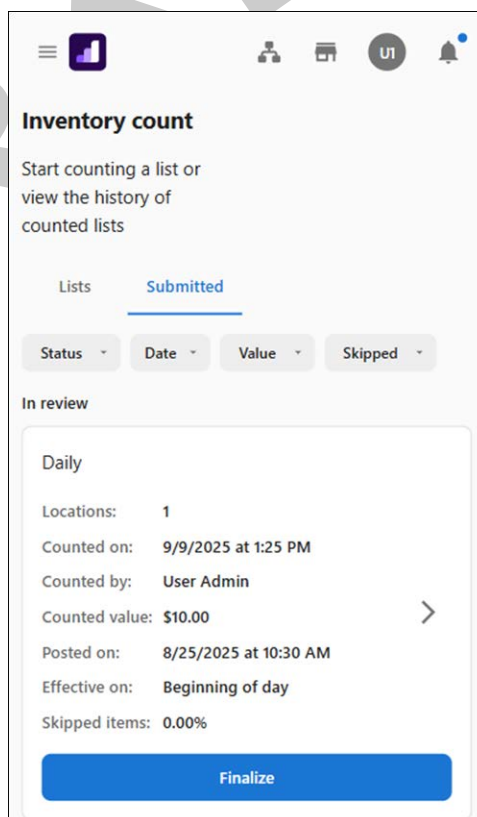
Posted on — Date and time when the previous posting occurred.

Effective on — Time of the day (beginning or end) when the count was posted.

Skipped items — Items that were not counted (indicated in percentage).

To finalize a counted list:

1. Select **Inventory > Counting and locations > Inventory count**. The **Inventory count** screen appears.
2. Click the **Submitted** tab.

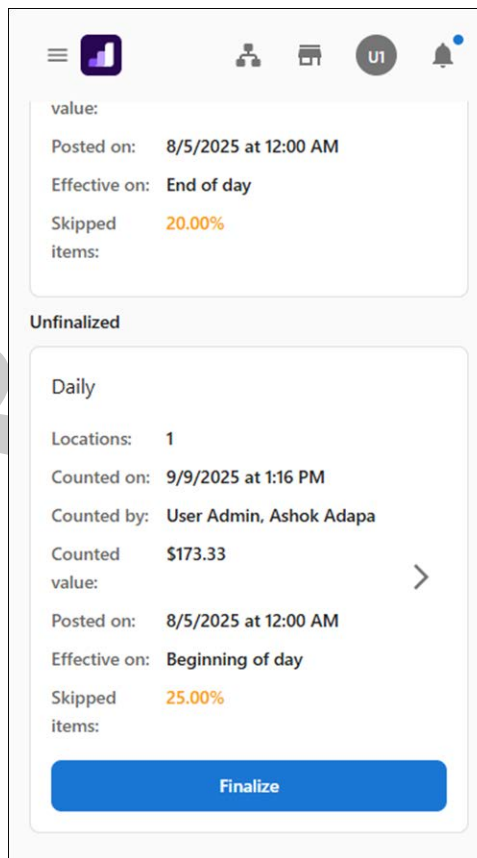


List under review

- Under 'In review', click **Finalize**. A success message appears. The corresponding counting list is finalized and moved under the 'Finalized' status.

To unfinalize a counted list:

- Select **Inventory > Counting and locations > Inventory count**. The **Inventory count** screen appears.
- Click the **Submitted** tab.
- For an administrator, under 'Finalized', click the **three-dotted icon** available on the tile. The **Unfinalize** option appears.
- Click **Unfinalize**. A success message appears. The corresponding counting list is moved under the 'Unfinalized' status.



Unfinalized counting list

Note

You can use the **Finalize** option to finalize the counting list again.

Managing recipes

A recipe is a structured list of inventory ingredients used to create both prep items and sales items. It includes detailed information such as the required ingredients, their quantities, and the associated cost to prepare the recipe. You can also define the sequence in which ingredients must be used during preparation to ensure consistency and accuracy. In addition, Aloha Smart Manager allows you to control recipe availability by setting a specific start and end date. This is especially useful for limited-time offerings, such as seasonal or promotional dishes, where the recipe should only be available for a defined period..

Name	ID	Type	Yield	Yield ...	Ingredients	Contains pre...	Ownership	Active
Chicken Tenders update...	763	Recipe	1,000	Cup	Mionise for chick	✓	Orga...	✓
Chicken Hot wings	723	Recipe	10,000	Each	New-Chicken, Mi	✗	Orga...	✓

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.

Type — Indicates the whether corresponding item being prepared is a recipe or prep item.

Yield — 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.

Yield 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.

Contains prep item — Indicates whether the recipe contains prep item.

Ownership — Indicates the level at which the recipe is applicable, either for entire organization or specific sites.

Active — Indicates whether the recipe is currently active for usage or not.

Actions — Option to edit, clone, deactivate, and delete a recipe.

Creating a new recipe (not a prep item)

You can create a recipe that is a **final recipe** served directly to customers. For example, Chicken hot wings.

To create a recipe without prep item:

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, which you can modify.
3. Enter a **unique name** for the recipe (maximum of 50 characters). For example, Chicken hot wings.
4. Select a **sales item** to which the recipe must be mapped.
5. Enter a **description** for the recipe, such as 'Chicken hot wings.'
6. Enter the **expected output quantity** in 'Yield amount.' For example, 1 indicates one chicken wings dish.
7. Select the **unit of measure** in 'Yield units'.
8. 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.

General information

Name *	Sale items
Chicken hot wings 33 characters remaining	DINNER #16
Description *	Recipe ID *
A quick classic American chicken snack.	65 13 characters remaining
Yield amount *	Yield unit *
1	Each
Start date *	End date
03/16/2026	03/31/2026

Prep item

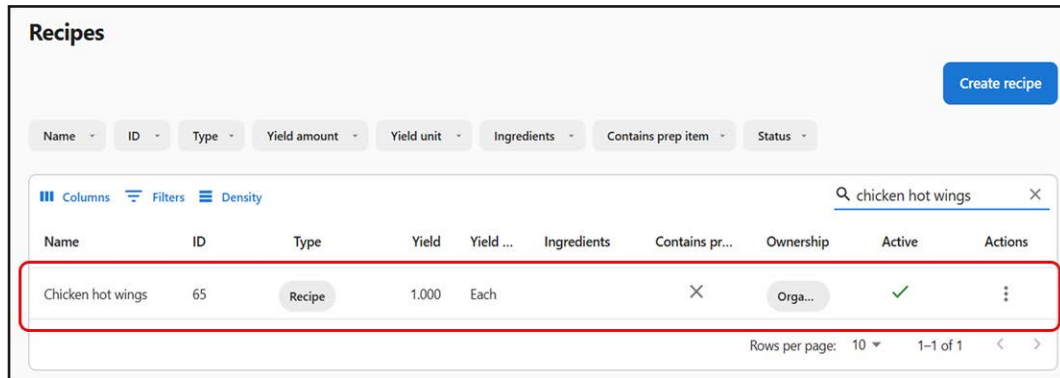
If this recipe is a prep item, or a recipe that will be used in another recipe, check the box below. Note, prep recipes are counted, so additional information is required if the box is checked.

This is a prep item

Back Save

Creating new recipe

9. Click **Save** to confirm the details. The 'New recipe saved' success message appears. Additionally, the created recipe appears on the Recipes home screen.



The screenshot shows the 'Recipes' home screen. At the top right is a 'Create recipe' button. Below it are several filter buttons: Name, ID, Type, Yield amount, Yield unit, Ingredients, Contains prep item, and Status. A search bar contains 'chicken hot wings'. Below the search bar is a table with the following columns: Name, ID, Type, Yield, Yield ..., Ingredients, Contains pr..., Ownership, Active, and Actions. The table has one row: 'Chicken hot wings', ID '65', Type 'Recipe', Yield '1.000', Yield unit 'Each', Contains prep item 'X', Ownership 'Orga...', Active '✓', and Actions '⋮'. A red box highlights the entire table row. At the bottom right, it says 'Rows per page: 10' and '1-1 of 1'.

Name	ID	Type	Yield	Yield ...	Ingredients	Contains pr...	Ownership	Active	Actions
Chicken hot wings	65	Recipe	1.000	Each		X	Orga...	✓	⋮

Created recipe appear as 'Recipe'

Next step is to add the [ingredients](#).

Creating a new recipe (prep item)

You can create a recipe that is a **prep item** used as an ingredient in any other recipes. For example, Ketchup.

To create a recipe with prep item:

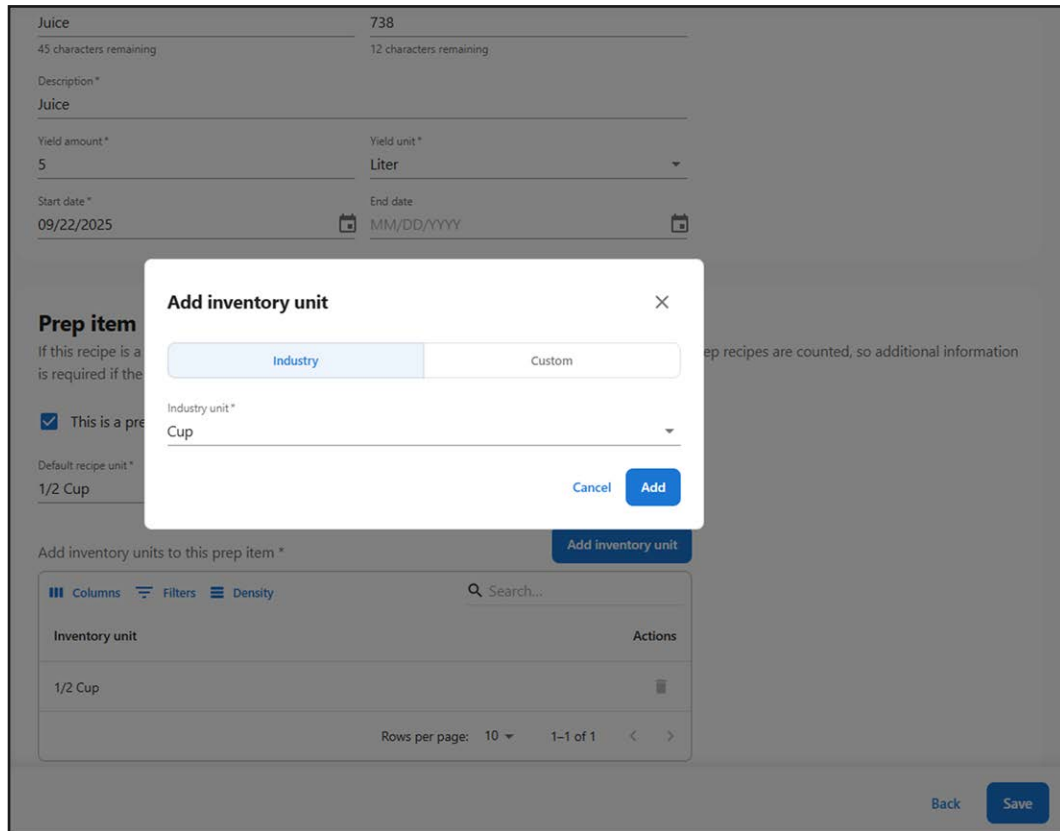
1. Follow the [step 1](#) through [step 8](#) in creating the recipes.
2. Select the **This is a prep item** option. Upon selection, the option to select unit of measure of the prep item appears.

3. Select the **default recipe unit**.

The screenshot shows a form for creating a recipe item. At the top, there are fields for 'Juice' (738) and 'Description*' (Juice). Below that, 'Yield amount*' is set to 5 and 'Yield unit*' is set to Liter. 'Start date*' is 09/22/2025 and 'End date' is MM/DD/YYYY. The 'Prep item' section has a checked box 'This is a prep item' and 'Default recipe unit*' set to 1/2 Cup. Below this is a table titled 'Add inventory units to this prep item *' with a search bar and a table with one row: '1/2 Cup'. The table has columns for 'Inventory unit' and 'Actions'. At the bottom right, there are 'Back' and 'Save' buttons.

Creating recipe with prep item

- (Optional) If you want to include additional inventory units, click **Add inventory unit**, select either the **industrial** unit of measure or select a **custom** unit of measure, and click **Add**.



Adding inventory units for prep item - Pop up

The corresponding inventory unit appears in the **Add inventory units to this prep item** section.

The screenshot shows the 'Prep item' configuration form for 'Juice'. The form includes fields for 'Yield amount' (5), 'Yield unit' (Liter), 'Start date' (09/22/2025), and 'End date'. A checkbox labeled 'This is a prep item' is checked. Below this, the 'Default recipe unit' is set to '1/2 Cup'. A section titled 'Add inventory units to this prep item' contains a table with two rows: '1/2 Cup' and 'Cup'. Each row has a trash icon in the 'Actions' column. A blue 'Add inventory unit' button is located at the top right of this section. The form also has 'Back' and 'Save' buttons at the bottom right.

Added inventory units to prep item

5. Click **Save** to confirm the details. The 'New recipe saved' success message appears.

The screenshot shows the 'Recipes' list. A blue 'Create recipe' button is at the top right. Below it are filter buttons for 'Juice', 'ID', 'Type', 'Yield amount', 'Yield unit', 'Ingredients', 'Contains prep item', and 'Status'. A table lists the recipes. The first row is highlighted with a red box and contains the following data:

Name	ID	Type	Yield	Yield ...	Ingredients	Contains pr...	Ownership	Active	Actions
Juice	738	Prep item	5,000	Liter	Fruit	×	Orga...	✓	⋮

At the bottom right of the table, it says 'Rows per page: 10' and '1-1 of 1'.

Created prep item appear as 'Prep item'

Next step is to add the [ingredients](#).

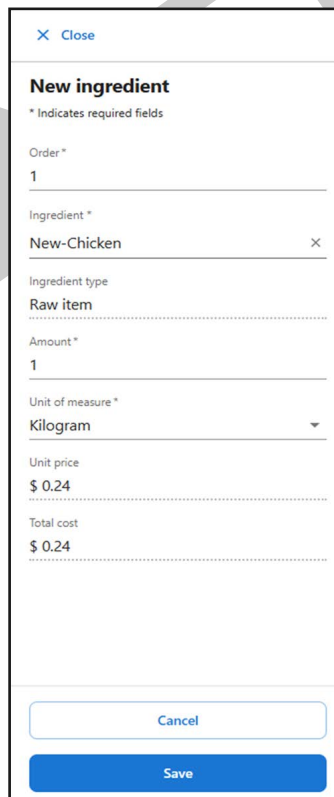
Adding ingredients to recipe

The **Add ingredient** option allows you to include individual ingredients in a recipe.

To add ingredients to a recipe:

1. Upon successfully creating the recipe, the **Ingredients** tab is enabled for the recipe. Click the **Ingredients** tab.
2. Click **Add ingredient**. 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.
3. Select the **ingredient** from the All, Raw items, or Prep items options. Based on the selection, the type of ingredient is auto-populated as either 'Raw item' or 'Prep item.'
4. Enter the **quantity of raw items** in 'Amount'.
5. Select the **unit of measure** required for the recipe.

The unit price of the ingredient and total ingredient cost appears in the **Unit price** and **Total cost** options, respectively.



Close

New ingredient

* Indicates required fields

Order*
1

Ingredient*
New-Chicken

Ingredient type
Raw item

Amount*
1

Unit of measure*
Kilogram

Unit price
\$ 0.24

Total cost
\$ 0.24

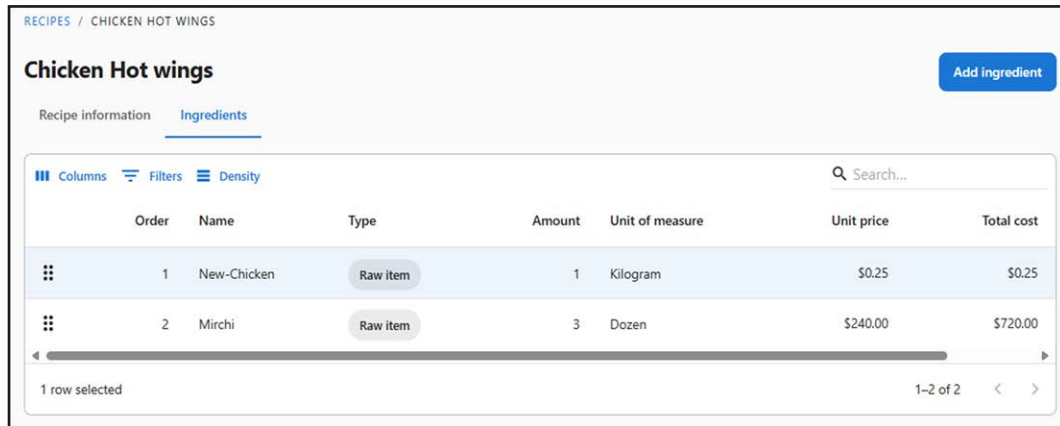
Cancel

Save

New ingredient details

6. Click **Save** to confirm the added ingredient. The 'New ingredient saved' success message appears.

If you want to add more ingredients, click **Add ingredients** and repeat [step 2](#) through [step 6](#) to **add more ingredients** to the recipe.



The screenshot shows a web interface for a recipe titled 'Chicken Hot wings'. The 'Ingredients' tab is active, displaying a table with the following data:

Order	Name	Type	Amount	Unit of measure	Unit price	Total cost
1	New-Chicken	Raw Item	1	Kilogram	\$0.25	\$0.25
2	Mirchi	Raw Item	3	Dozen	\$240.00	\$720.00

The interface also includes a search bar, a '1 row selected' indicator, and a '1-2 of 2' pagination control.

Recipe is created

After adding all the ingredients, the following details are updated in the 'Recipe costing' section under the **Recipe 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.

RECIPES / CHICKEN HOT WINGS

Chicken Hot wings

Last edit was 13/10/2025 by acct:commerce@00u7obo2hrds2esz41d7-ncr.cbo.eng+user01@gmail.com [Edit recipe](#)

[Recipe information](#) [Ingredients](#)

General information

Name	Chicken Hot wings	Recipe ID	723
Description	A quick and classic American street food. Grill or boil sausages, place them in soft buns, and top with mustard, ketchup, relish, or onions. Perfect for cookouts and ball games. Ingredients:		
Yield amount	10.000	Yield unit	#5 Can
Start date	September 18, 2025	End date	September 30, 2025

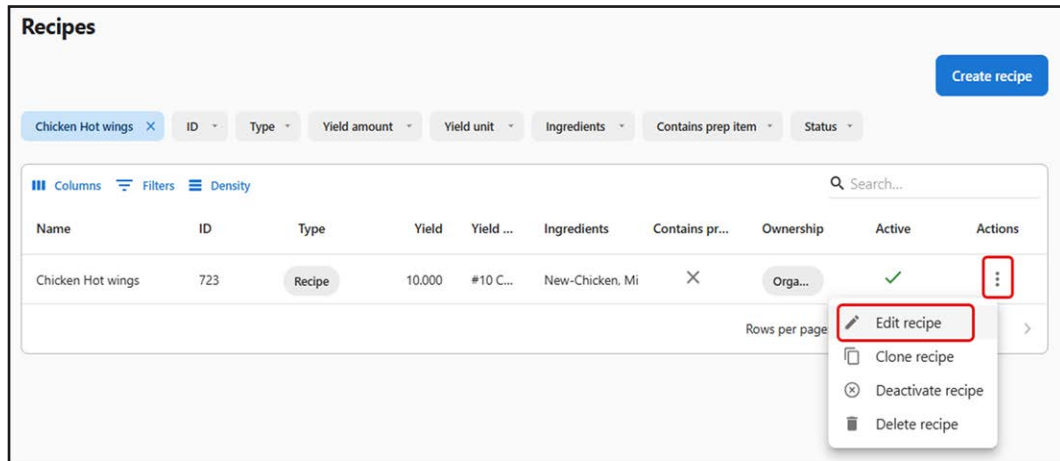
Recipe costing

Recipe Cost (\$)	\$720.245	Recipe Cost (%)	0.000%
Goal Price (\$)	\$720.245	Goal Price (%)	0.000%
POS Price (\$)	\$0.000		

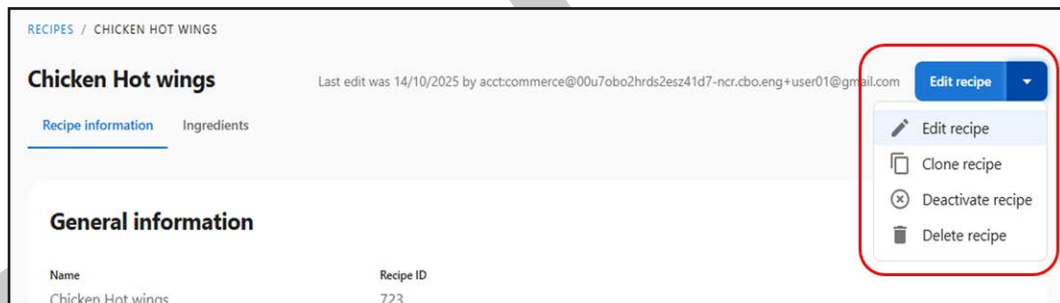
Total cost of the recipe after adding ingredients

Updating a recipe

Use the 'Edit recipe' option to update an existing recipe. The options to edit a recipe is available on the home page (by clicking the three-dotted icon) and on the detailed-view page of the recipe.



Edit recipe option from 'Recipes' home screen

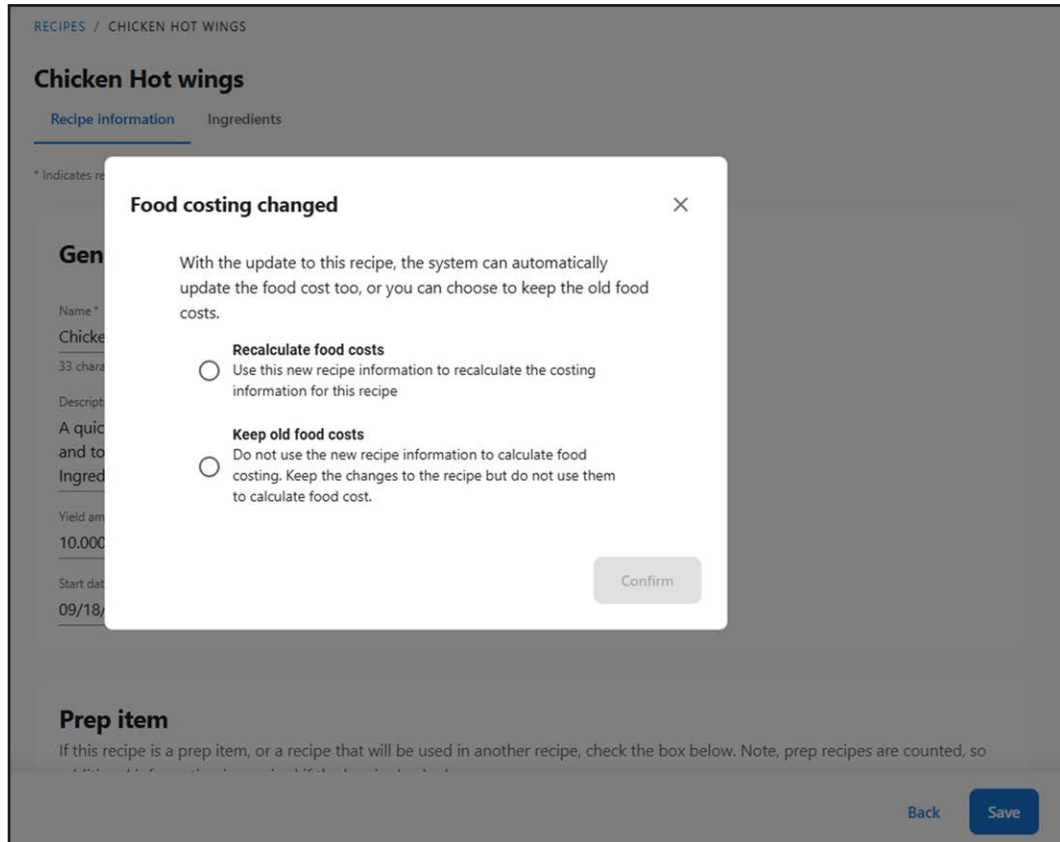


Edit recipe option from 'Edit recipe' button drop-down

To update an existing recipe:

1. Select **Inventory > Menu > Recipes**. The **Recipes** screen appears.
2. Perform one of the following:
Click the **three-dotted** icon against the recipe that you want to update and select **Edit recipe**.
Or,
Select the **existing recipe** that you want to update, a detailed-view of the recipe appears. Click **Edit recipe**.
3. Update the **recipe details** as required in the **Recipe information** tab.

- The yield unit cannot be updated if the prep item is already mapped to a sales item.
- Likewise, if a recipe is already mapped to a sales item and you try to update the yield unit, the following pop-up appears:



Updating food costing

Select **one** of the following options:

- **Recalculate food costs** - The costing of recipe is recalculated from the start date when the recipe is available.
- **Keep old food costs** - The old costing is unchanged and food cost for future transactions are impacted as per the selection made here.

Once the selection is completed, click **Confirm** to update the food costing.

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

8. 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.

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

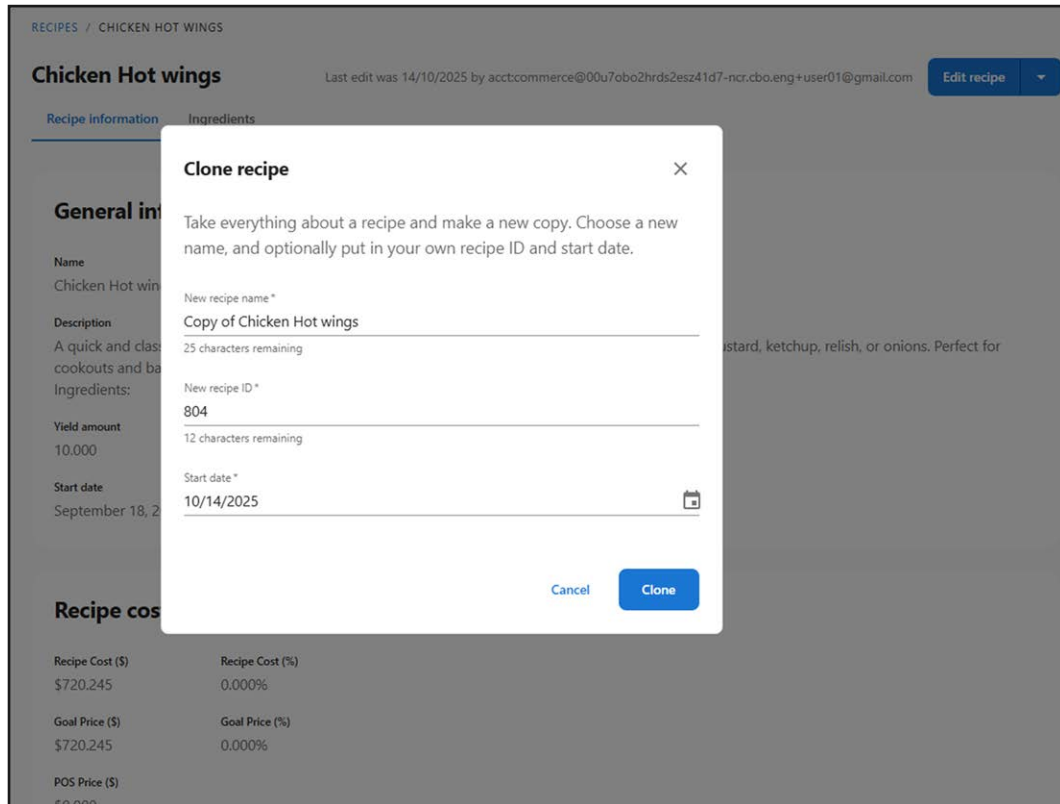
Cloning a recipe

Use the 'Clone recipe' option to easily duplicate an existing recipe record to update it as required.

To clone a recipe:

1. Select **Inventory > Menu > Recipes**. The **Recipes** screen appears.
2. Perform one the following:
Click the **three-dotted** icon against the recipe that you want to update and select **Clone recipe**.
Or,
Select the **existing recipe** that you want to clone, a detailed-view of the recipe appears. Click the drop-down available on the **Edit recipe** button and select **Clone recipe**.
The **Clone recipe** pop-up window appears.
3. Enter a **new name** for the recipe. By default, the recipe name appears as 'Copy of <existing name of recipe>'. For example, if you are cloning the 'Chicken Hot wings' recipe, the name default appears as 'Copy of Chicken Hot wings' appears, you can modify it as required.
Additionally, a default **recipe ID** appears, which you can modify as required.

4. Select the **start date** to indicate the date from when the recipe is available for usage.



Cloning a recipe

5. Click **Clone** to confirm cloning of the recipe.

Deactivating a recipe

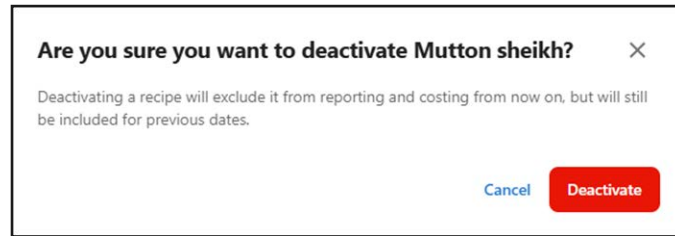
Use the 'Deactivate recipe' option to temporarily remove the recipe from business use and remove it from any future reporting and costing. However, the previous costing of the corresponding recipe is retained.

You can reactivate the recipe later whenever required.

To deactivate a recipe:

1. Select **Inventory > Menu > Recipes**. The **Recipes** screen appears.
2. Perform one the following:
 - Click the **three-dotted** icon against the recipe that you want to deactivate and select **Deactivate recipe**.
 - Or,
 - Select the **existing recipe** that you want to deactivate, a detailed-view of the recipe appears.
 - Click the drop-down available on the **Edit recipe** button and select **Deactivate recipe**.

A pop-up appears to confirm the deactivation.



Deactivating a recipe

3. Click **Deactivate**. The '<Recipe name> has been successfully deactivated' message appears.

Activating a recipe

Use the 'Activate recipe' option to reactivate the recipe and the costing resumes.

To activate a recipe:

1. Select **Inventory > Menu > Recipes**. The **Recipes** screen appears.
2. Perform one the following:
Click the **three-dotted** icon against the recipe that you want to deactivate and select **Activate recipe**.
Or,
Select the **existing recipe** that you want to activate, a detailed-view of the recipe appears. Click the drop-down available on the **Edit recipe** button and select **Activate recipe**. The recipe is reactivated successfully.

Deleting a recipe

Use the 'Delete recipe' option to remove the recipe from the system.

To delete a recipe:

1. Select **Inventory > Menu > Recipes**. The **Recipes** screen appears.
2. Perform one the following:
Click the **three-dotted** icon against the recipe that you want to deactivate and select **Delete recipe**.
Or,

Select the **existing recipe** that you want to delete, a detailed-view of the recipe appears. Click the drop-down available on the **Edit recipe** button and select **Delete recipe**. A warning message indicating that the deleted recipe cannot be retrieved appears.



Deleting a recipe

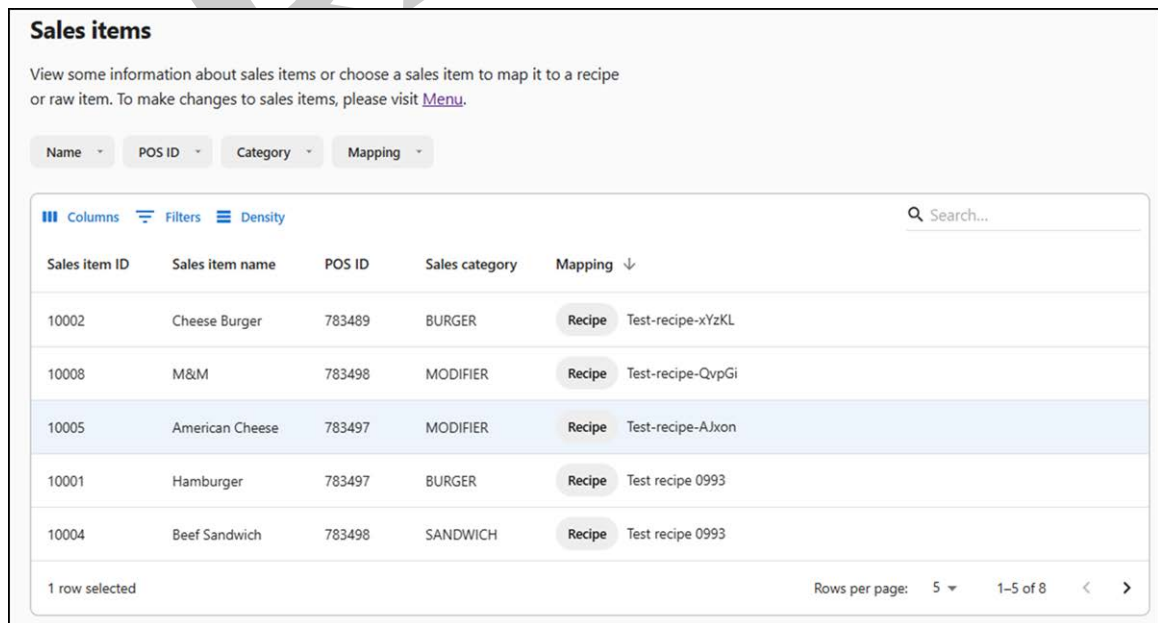
3. Click **Delete** to confirm.

Viewing and mapping sales items

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.



The screenshot shows the "Sales items" screen. At the top, there's a title "Sales items" and a subtitle "View some information about sales items or choose a sales item to map it to a recipe or raw item. To make changes to sales items, please visit [Menu](#)." Below the subtitle are four filter buttons: "Name", "POS ID", "Category", and "Mapping". There are also icons for "Columns", "Filters", and "Density", and a search bar labeled "Search...". The main part of the screen is a table with the following columns: "Sales item ID", "Sales item name", "POS ID", "Sales category", and "Mapping". The table contains six rows of data. The third row, "American Cheese", is highlighted in blue. At the bottom left, it says "1 row selected". At the bottom right, it says "Rows per page: 5" and "1-5 of 8" with navigation arrows.

Sales item ID	Sales item name	POS ID	Sales category	Mapping
10002	Cheese Burger	783489	BURGER	Recipe Test-recipe-xYzKL
10008	M&M	783498	MODIFIER	Recipe Test-recipe-QvpGi
10005	American Cheese	783497	MODIFIER	Recipe Test-recipe-AJxon
10001	Hamburger	783497	BURGER	Recipe Test recipe 0993
10004	Beef Sandwich	783498	SANDWICH	Recipe Test recipe 0993

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.

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 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.

The screenshot shows a mobile application interface for configuring an item. At the top, there is a 'Close' button with an 'X' icon. Below it are navigation arrows for 'Previous' and 'Next', with the current item name 'Beef Sandwich' displayed. The main section is titled 'American Cheese' and includes the 'Sales ID: 10005'. A dropdown menu labeled 'Recipe or raw item' is currently set to 'recipe'. There are input fields for 'Start date' and 'End date'. Below these are sections for 'Modifier groups' and 'Sales category', which is set to 'MODIFIER'. At the bottom of the screen, there are two buttons: 'Save and close' and 'Save & next'.

Mapping a recipe or raw item

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

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.

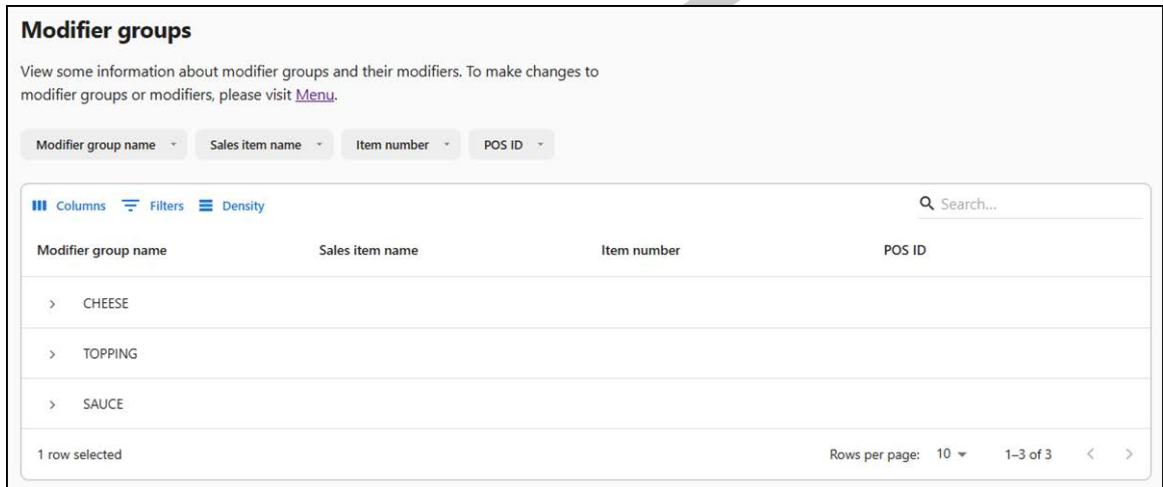
Viewing modifier groups

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.

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.

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.

Working with inventory reports

You can run the 'Invoice history' report in the Inventory Core and Advanced packages.

Likewise, the following reports are part of Advanced Inventory package only:

- Cost of goods sold Actual vs. Theoretical Detail
- Perpetual inventory on-hand
- Low stock report
- Top 20 item usage report

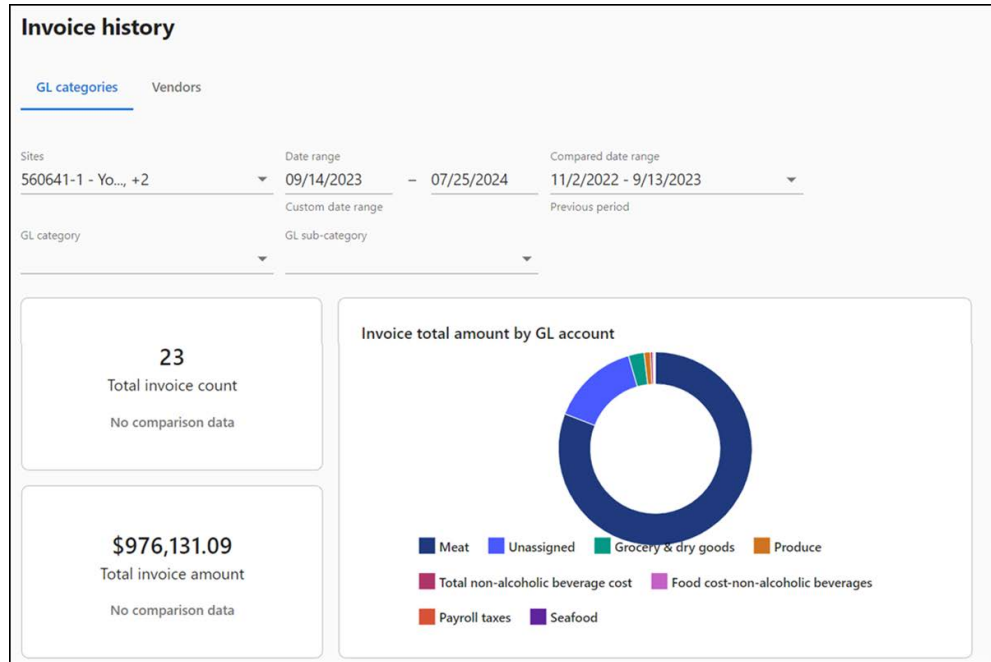
Invoice history report

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 > Reports > 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 **General Ledger (GL) category** type from the drop-down list.

- Select a **General Ledger (GL) sub-category** type from the drop-down list. The following details appear on the screen.



'Invoice history' report - GL categories

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

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

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

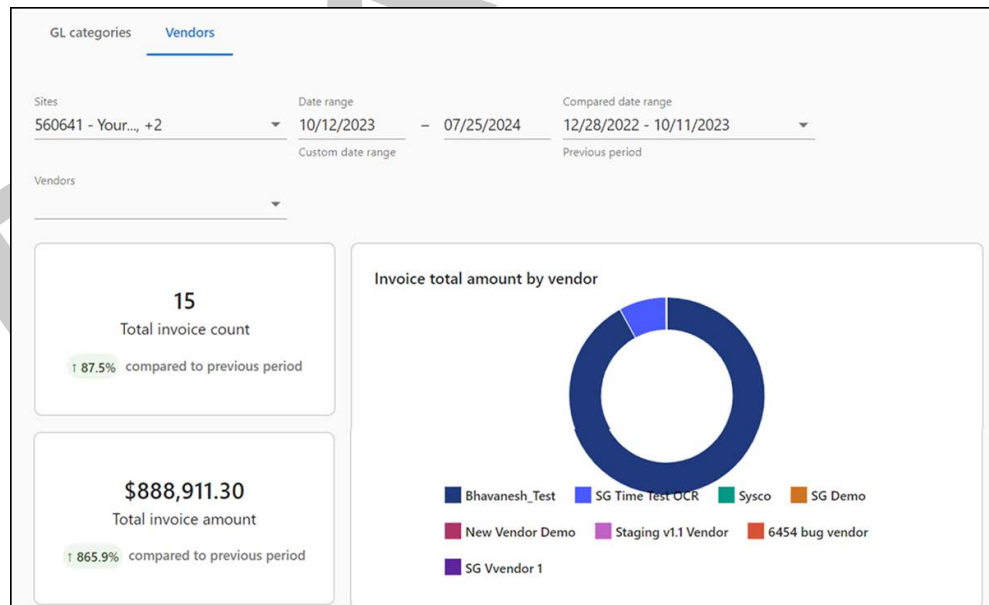
Invoice history report details

The following information appears in the report:

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

To run an 'Invoice history report' of Vendors:

1. Select **Inventory > Invoice history report**. The details in GL categories tab appears by default.
2. Click **Vendors**.
3. Select the **site(s)**.
4. Select the **date range**.
5. Select the **compared date range**.
6. Select one or more **vendors** from the drop-down list. The following details appear on the screen:



Invoice history report - Vendors

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

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

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

The following information appears in the report:

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

Cost of goods sold (COGS) report

A manager uses the Cost of goods sold (COGS) report to track the direct cost of ingredients and supplies used to prepare menu items. This report helps restaurants understand how much is spent to produce food and beverages. It includes the opening inventory, records the purchases made during the period, and calculates actual usage based on the closing inventory. By analyzing COGS, restaurant teams manage inventory more effectively, reduce waste, and increase profit margins.

Managers can run the 'Cost of goods sold' report to view the cost and usage of raw items between two inventory counts.

Note

Ensure at least one inventory count is recorded to generate the report. However, availability of at least two inventory counts is more beneficial.

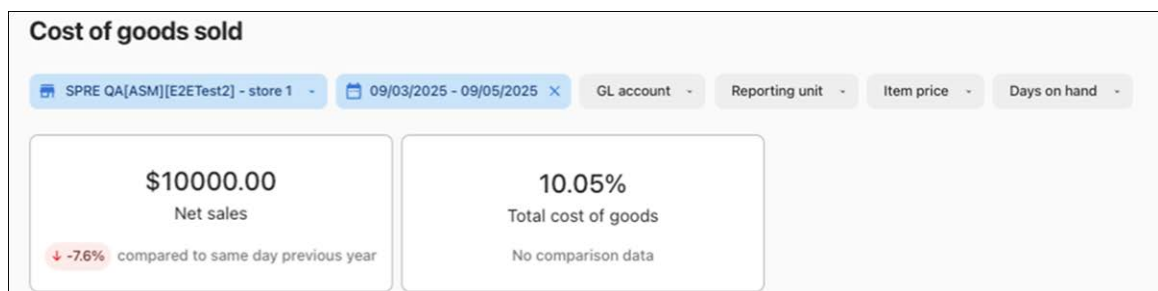
To run a COGS report:

1. Select **Inventory > Reports > Cost of goods sold**. The **Cost of goods sold** report appears.
2. Select a **site**.
3. Select the **date range** and click **Done**.

Note

Dates with at least one inventory count is only available for selection.

4. Select the **General Ledger (GL) account**.
5. Select the **reporting unit**.
6. Select the **item price** range.
7. Select the **days on hand** range. The following details appear on the screen:



Cost of goods sold report

Net sales — The total revenue generated from food and beverage sales after deducting any discounts, returns, or allowances.

Total cost of goods — Sum of all direct costs incurred to produce the items sold during a specific period.

The following information appears in the report:

The screenshot shows a report interface with a search bar and navigation options. The main table displays the following data for 'Cheese - Gouda':

Raw item name	GL account	Reporting unit	Start count	Total purchased quantity	End count	Item price	Ending inventory	Days on hand	Usage		
									Usage in units	Usage in dollars	Usage in percent
Cheese - Gouda	5160 - Dairy	Ounce	700	800	160	\$0.75	\$120.00	0.358	1,340	\$1,005.00	10.05%
							\$120.00			\$1,005.00	10.05%

At the bottom right of the table, it says 'Rows per page: 10' and '1-1 of 1'.

Cost of good sold report result

Column name	Description
Raw item name	The name of the ingredient or supply item. For example, Chicken breast.
GL account	The general ledger account number.
Reporting unit	The unit or location generating the report.
Start count	The quantity of the item available at the beginning of the reporting period.
Total purchases quantity	The amount of the item purchased during the reporting period.
End count	The quantity of the item remaining at the end of the reporting period.
Item price	The cost per unit of the item.
Ending inventory	The total value of the remaining stock.
Days on hand	The estimated number of days the current inventory will last based on the usage.
Usage in units	
Actual	The actual quantity of an item used during the reporting period.
Usage in dollars	
Actual	The total cost (in dollars) of the item used.
Usage in percent	
Actual	The percentage of total cost of goods sold that the item represents.

Top 20 items usage

The **Top 20 items usage** report gives managers a quick view of how ingredients are being used in their restaurant. It helps save time when checking for problems and supports smarter buying, costing, and daily operations.

This report highlights:

- The 20 most-used raw items.
- The 10 least-used raw items.

It works together with the Cost of Goods Sold (COGS) report and lets you compare Actual vs. Theoretical usage in both units and dollars. This makes it easier to spot items with unusual usage, possible mistakes, or waste.

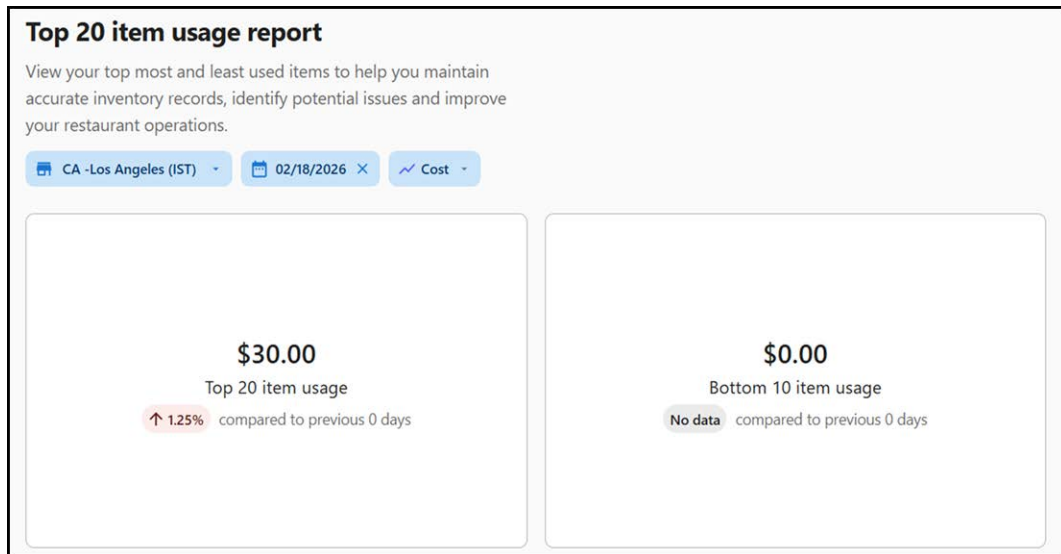
With this report, managers can quickly:

- See which ingredients have the biggest effect on food costs.
- Find items that show unusual or unexpected usage.
- Identify ingredients that may be used too much or too little.
- Take faster action to correct inventory issues.

To run the report by cost:

1. Select the **Reports** menu and click **Top 20 usage report** under the **Inventory reports** section.
Or,
Select **Inventory > Reports > Top 20 usage report**.
The **Top 20 usage report** appears. By default, the report data is generated by cost.
2. Select the **site**.
3. Select the **period (date range)**.
4. By default, the **Cost** option is selected.

The following data appears in a tile format:



Top 20 item usage in tile format

Top 20 item usage — The total value of top 20 items used by the restaurant.

Bottom 10 item usage — The total value of least 10 items used by the restaurant.

The following data appears in a graphical format:



Top 20 item usage in graphical format

The top 20 item usage data appears in a tabular format:

Item name	Reporting unit	Actual	Theory	Unit price	Variance
OnionPowder	Kilogram	\$10.00	\$0.00	\$1.00	\$10.00 0.00%
ls-recipe-2	Kilogram	\$10.00	\$0.00	\$0.10	\$10.00 ▲ 0.25%
Raw-recipe-ls-01	Kilogram	\$10.00	\$0.00	\$1.00	\$10.00 0.00%
PDT-paneer	Kilogram	\$0.00	\$0.00	\$1.00	\$0.00 ▲ 1.00%
				\$30.00	▲ 1.25%

Top 20 item usage in tabular format

Column	Description
Item name	The name of the raw item or ingredient.
Reporting unit	The unit of measure used to track the item.
Actual	The actual cost of the item used during the selected time period. This represents the real usage.
Theory	The theoretical cost of what should have been used, based on menu item sales and recipes.
Unit price	The cost per unit of the item.
Variance	<p>Variance sum</p> <p>The dollar difference between Actual and Theory usage.</p> <ul style="list-style-type: none"> • Positive variance may indicate over-use, waste, or incorrect recipes. • Zero or negative variance may indicate accurate or lower than expected usage. <p>Variance %</p> <p>Indicates the variance expressed as a percentage to quickly highlight usage issues or efficiency.</p>

Note

Similarly, the bottom 20 item usage data appears in a tabular format.

To run the report by quantity:

1. Select the **Reports** menu and click **Top 20 usage report** under the **Inventory reports** section.

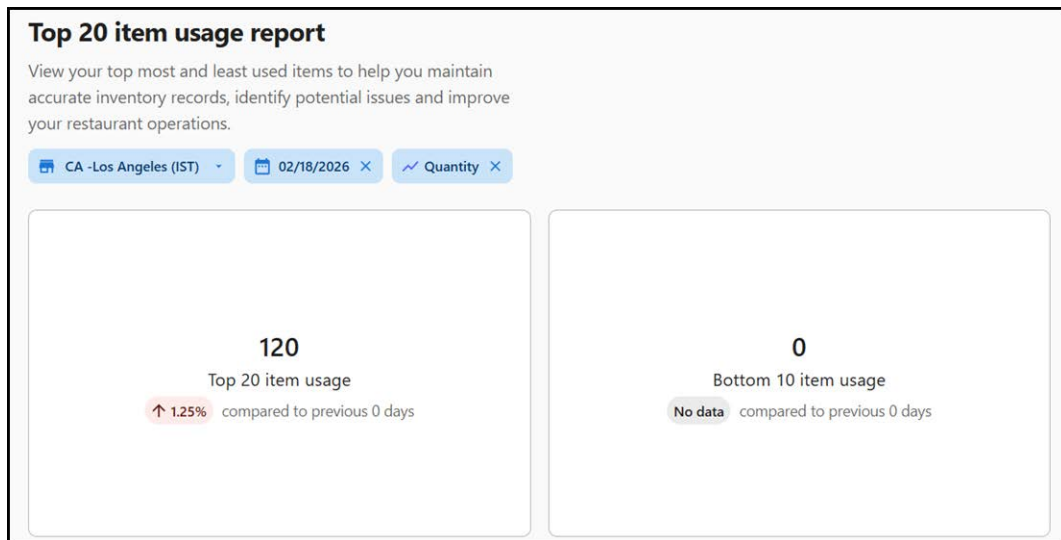
Or,

Select **Inventory > Reports > Top 20 usage report**.

The **Top 20 usage report** appears.

2. Select the **site**.
3. Select the **period (date range)**.
4. Select the **Quantity** option.

The following data appears in a tile format:



Top 20 item usage in tile format by Quantity

The following data appears in a graphical format:



Top 20 item usage in graphical format by Quantity

The top 20 item usage data appears in a tabular format:

Top 20 item usage					
Item name	Reporting unit	Actual	Theory	Unit price	Variance
Is-recipe-2	Kilogram	100	0	\$0.10	100 ▲ 0.25%
OnionPowder	Kilogram	10	0	\$1.00	10 0.00%
Raw-recipe-Is-01	Kilogram	10	0	\$1.00	10 0.00%
PDT-paneer	Kilogram	0	0	\$1.00	0 ▲ 1.00%
					120 ▲ 1.25%

Columns: Columns, Filters, Density, Export. Search: Search... Rows per page: 20. 1-4 of 4.

Top 20 item usage in tabular format by Quantity

Note

Similarly, the bottom 20 item usage data appears in a tabular format.

Perpetual inventory on-hand

The **Perpetual inventory on-hand** report shows your real-time stock levels without needing to depend only on manual physical counts. The system updates item quantities automatically whenever you:

- Buy products
- Sell menu items
- Use ingredients in recipes
- Transfer stock between locations
- Make manual adjustments

Because the report is always kept up to date, managers get an accurate view of what is currently available in the restaurant. This helps prevent stock-outs, reduces waste, and improves control over food costs.

The report calculates the current on-hand quantity by combining your last saved physical inventory with all new transactions and the expected (theoretical) usage. It also displays important details such as:

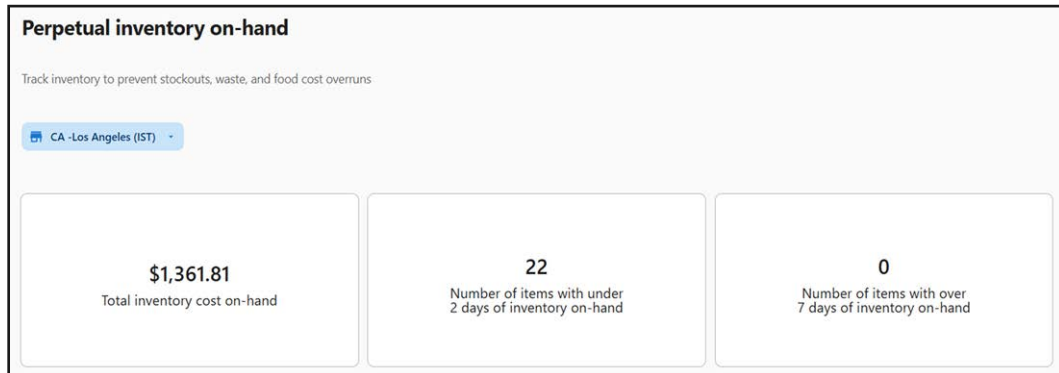
- Current item quantity
- Item value
- Days on hand
- Usage trends

This makes it easier for managers to track inventory, spot problems early, and make better ordering and operational decisions.

To run the report:

1. Select the **Reports** menu and click **Perpetual inventory on-hand** report under the **Inventory reports** section.
Or,
Select **Inventory > Reports > Perpetual inventory on-hand**.
The **Perpetual inventory on-hand** report appears for the default site.
2. (Optional) To generate report for a different site, select the required site from the **Site** drop-down.

The following data appears in a tile format:



Perpetual Inventory On-Hand tile information

Total inventory cost on-hand — The total value of all items currently in stock. It adds up each item’s on-hand quantity multiplied by its unit cost.

Number of items with under 2 days of inventory on-hand — This indicates how many items are expected to run out soon based on typical usage. Items with fewer than two days of supply may need immediate attention, such as reordering or adjusting production plans.

Number of items with over 7 days of inventory on-hand — This indicates how many items are stocked far above normal usage levels. Items with more than seven days of supply may be at risk of overstocking, waste, or quality issues.

The following data appears in a tabular format:

Item name	Reporting Unit	Beginning Inven...	Purchases	↓ Sales	Current on-hand	Cost	Total
PDT-Onions	Kilogram	380	0	3,700	-3,320	\$0.50	-\$1,000
PDT-Tomatoes	Kilogram	500	0	3,046	-2,546	\$0.50	-\$1,000
PDT-Ginger	Kilogram	2	0	41,755	-39,755	\$0.00	-\$2,000
PDT-oranges	Kilogram	5	0	32,747	-27,747	\$10.00	-\$2,750
Balsamic Glaze	Ounce	960	0	0	960	\$0.00	\$0.00

Perpetual Inventory On-Hand tabular information

Column	Description
Item name	The name of the raw item or ingredient.
Reporting Unit	The unit of measure of the item.
Beginning Inventory	The starting quantity from your last saved physical inventory count.
Purchases	The total quantity of the item received through purchase orders since the last inventory.
Sales	The quantity used based on recipe usage and menu item sales.
Current on-hand	The system-calculated real-time quantity available.
Cost	The unit cost of the item.
Total value	The total on-hand value of the item.
Days on-hand	The estimated number of days the current stock will last, based on recent usage.

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Low stock report

The **Low stock report** helps restaurant managers quickly see which ingredients are running low so they can order more before they run out. It shows key information, including how many items are already out of stock and how many are close to running out.

The system checks each vendor and lists only the items that are expected to run out before the next delivery. It starts the calculation using today's date and predicts future usage based on past trends and recipe settings. All quantities are shown using the vendor's order units, and the report only includes items that actually have a shortage. This keeps the report simple, clear, and easy to use.

This report helps you:

- Spot low-stock items early.
- Order the right items at the right time.
- Avoid last-minute shortages.

To run a low stock report by vendor grouping:

1. Select the **Reports** menu and click **Low stock report** under the **Inventory reports** section.
Or,
Select **Inventory > Reports > Low stock report**.
The **Low stock report** appears. By default, the report data appears based on **vendor** grouping.
2. Select the **site**. The following data is generated:

Items running out — Shows the number of items that are already out of stock or will run out today.

Items running low — Shows the number of items that are close to running out soon.

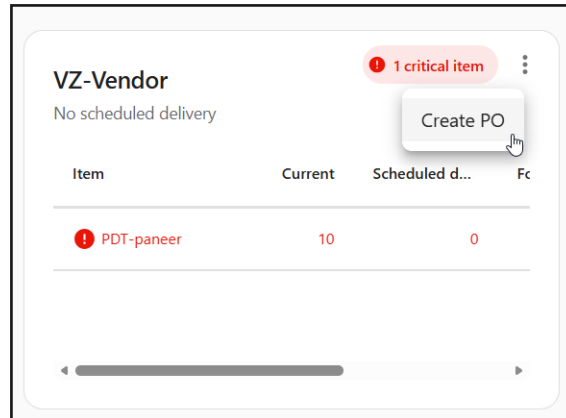
Other low items — Lists items with low quantities that may need attention but are not immediately critical.

The screenshot displays the 'Low stock report - Tile view' interface. At the top, there are tabs for 'Vendors' and 'Items', with 'Vendors' selected. Below the tabs is a location filter set to 'CA - Los Angeles (IST)'. The main content area features three summary tiles: 'Items running out' (1 item), 'Items running low' (0 items), and 'Other low items' (0 items). Below these tiles is a detailed view for 'VZ-Vendor', which includes a '1 critical item' indicator and a 'No scheduled delivery' status. A table below the vendor details shows the following data:

Item	Current	Scheduled d...
! PDT-paneer	10	

Low stock report - Tile view

Additionally, separate panel appears at the bottom with details related to item that are critical or items that are running low. On selecting the three-dotted icon, the **Create PO** option appears using which you can create a new purchase order. Upon selecting the Create PO option, you are redirected to the **Purchase order** screen.



Option to create PO

The following details appear on the separate panel:

Column	Description
Item	Name of the item that has low or critical stock.
Current	Count of items available right now.
Scheduled deliveries	Indicates whether any new stock for that item is already on the way.
Forecast sales	Predicts how much of the item is expected to use in the upcoming days based on past patterns.
Shortage	Indicates how much you will be short after comparing what you have and what you expect to receive versus how much you are predicted to use.
Runout day	Indicates the exact day the system predicts you will run out of the item.

To run a low stock report by item grouping:

1. Select the **Reports** menu and click **Low stock report** under the **Inventory reports** section.
 Or,
 Select **Inventory > Reports > Low stock report**.
 The **Low stock report** appears. By default, the report details appear based on **vendor** grouping.
2. Select the **Items** tab.

3. Select the **site**. The following data is generated:

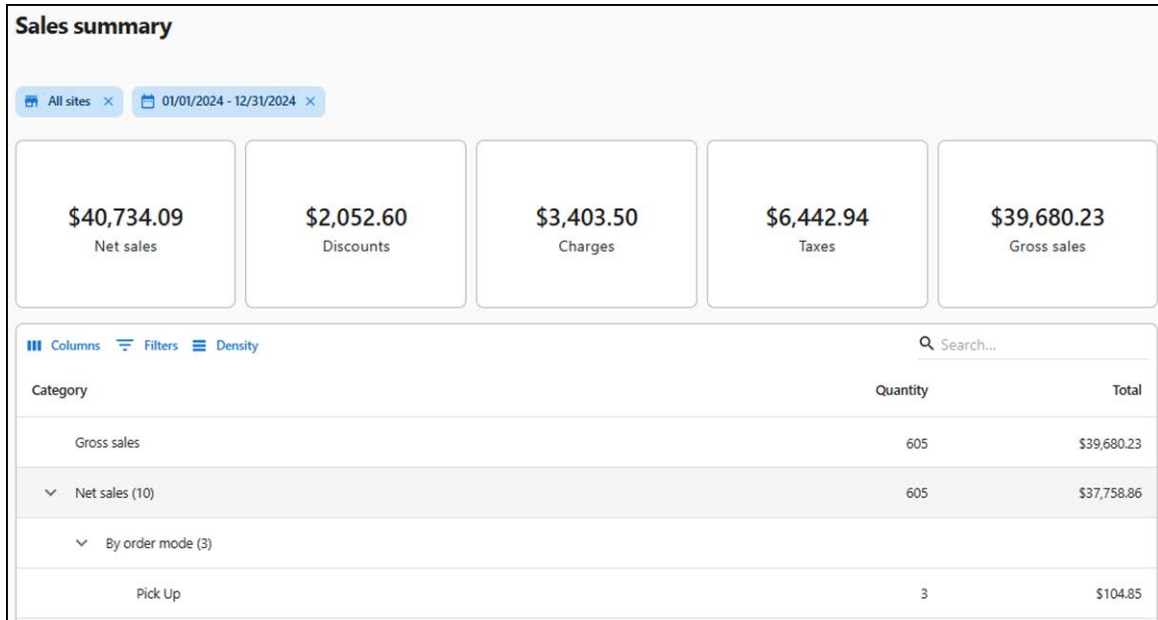
Column	Description
Vendor	The company or person who supplies the item.
Item	The product you are tracking in inventory.
Current on hand	Indicates how many units of the item you have right now.
Scheduled deliveries	Indicates how many units are already ordered and expected to arrive soon.
Forecast sales	Indicates how many units you are expected to sell in the near future.
Shortage	The amount you will be missing after comparing what you have (and what's coming) to what you expect to sell.
Runout	The estimated time or date when the item will run out if sales continue as expected.
Actions	Option to manage the item, like editing or creating purchase orders.

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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.

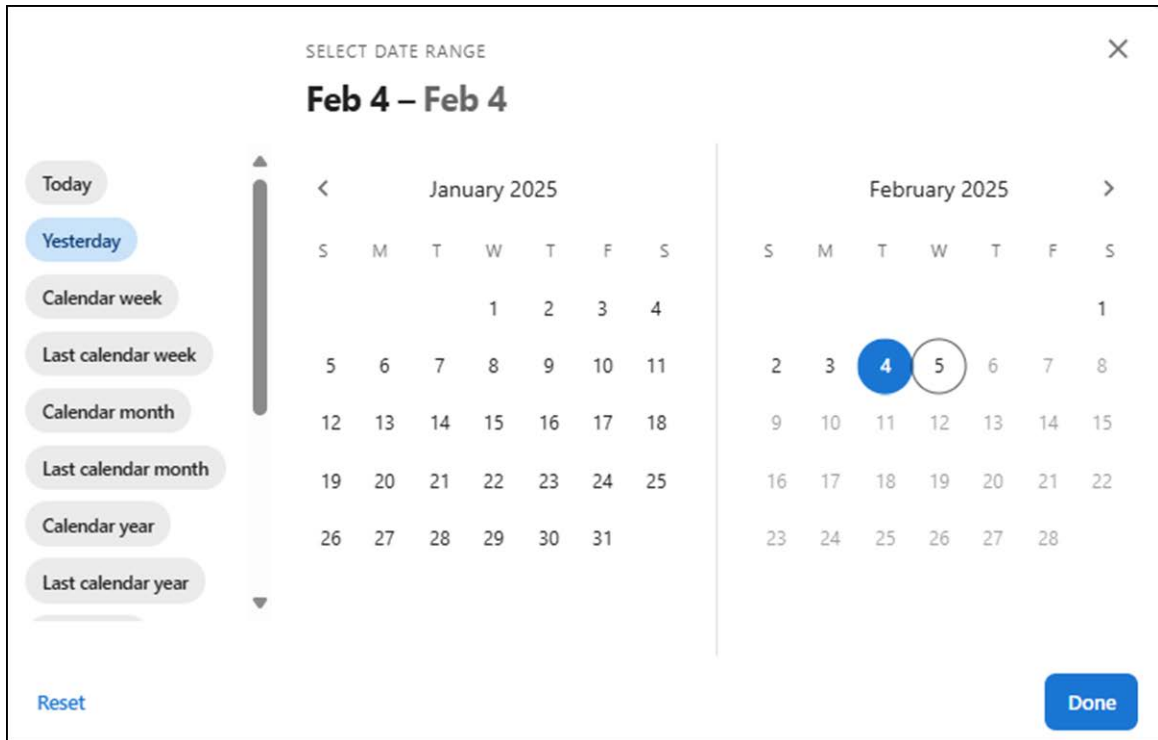
Each sales report defaults to the previous day.



'Sales summary' landing page

Calendar

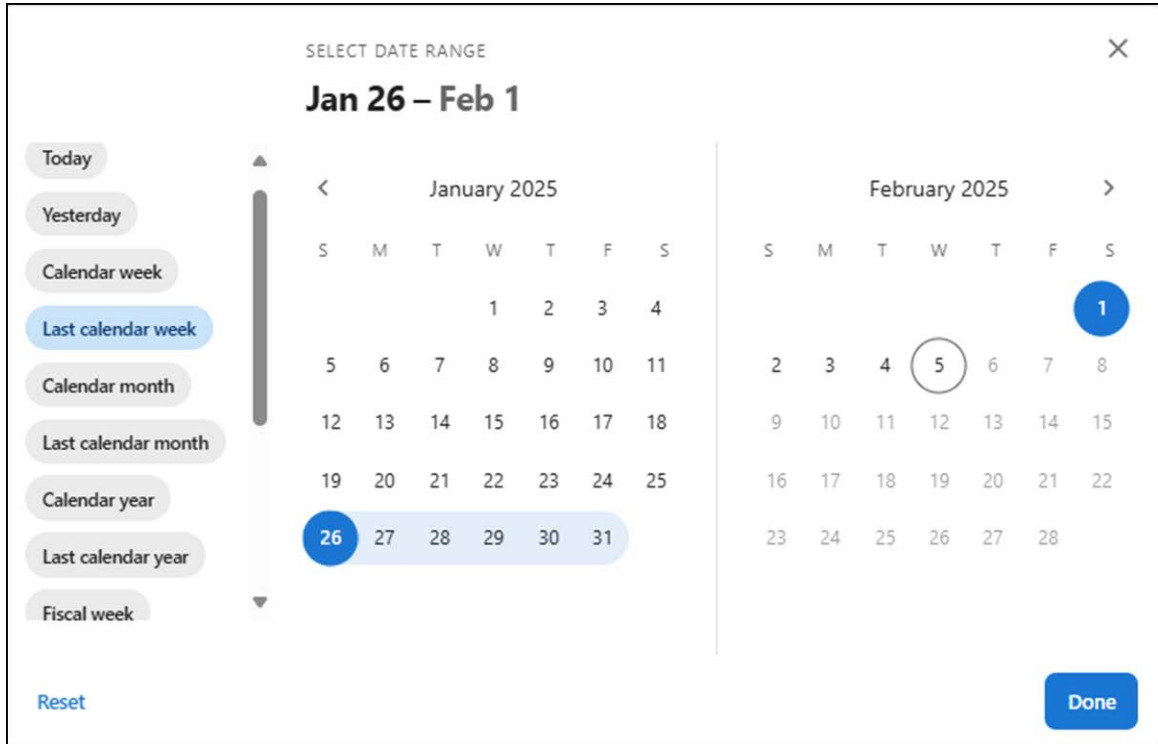
Use the 'Calendar' option to pick a specific date or week. For instance, while working with invoices, select a specific date to generate the invoice; whereas, while working on scheduling, pick a specific week.



Calendar control to select a date

Date range selections

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



Date range selection

Working with sales reports

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

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

Sales summary

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

Sales summary

All sites x 01/01/2024 - 12/31/2024 x

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

Columns Filters Density Search...

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

'Sales summary' report

To run the 'Sales summary' report:

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

The screenshot displays the 'Sales summary' report interface. A modal window titled 'Site' is open, showing a list of sites with checkboxes and a 'Select all Sites' toggle. The background shows a summary card with values: 2.60 (Units), \$3,403.50 (Charges), \$6,442.94 (Taxes), and \$39,680.23 (Gross sales). Below this is a table with columns 'Quantity' and 'Total'.

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

'Sales summary' - Site options

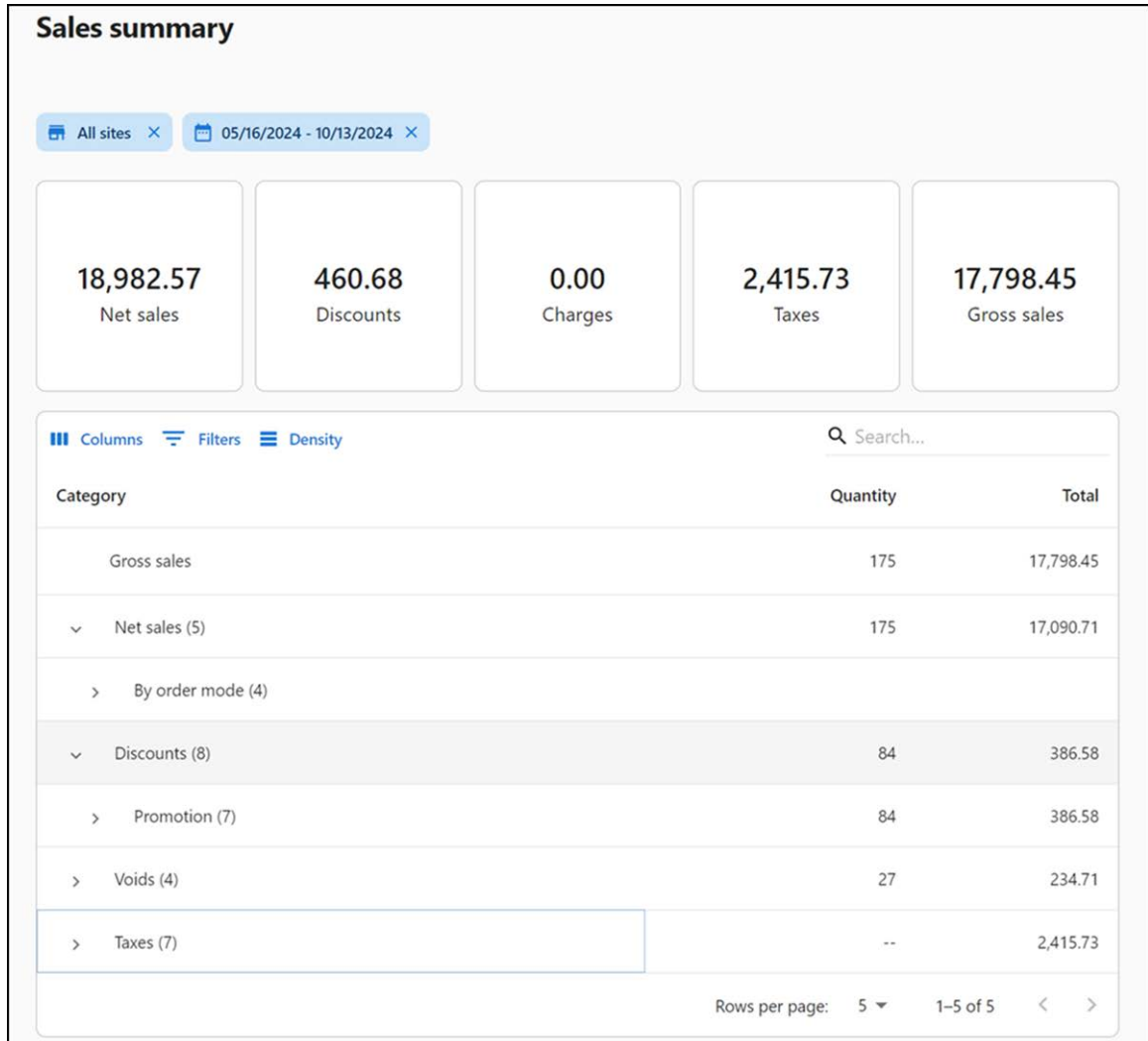
2. Select a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select all Sites**.

Note

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

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

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



'Sales summary' report tiles

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

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

Charges — Displays the total amount of additional charges.

Taxes — Displays the total amount of taxes assessed.

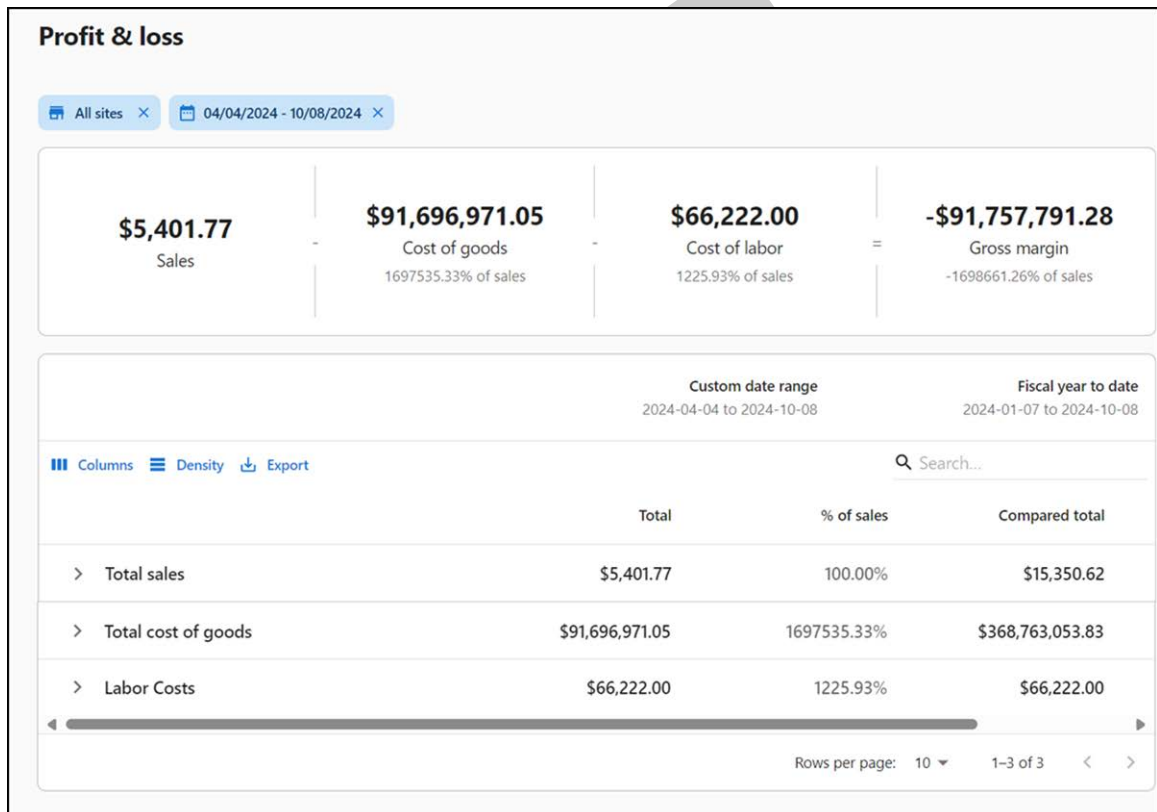
Gross Sales — Displays the total Gross Sales amount. Gross Sales are the Item Sales of non-voided 'Sales' items (includes Inclusive Taxes).

The following information appears in the report:

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

Profit & loss

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



'Profit & loss' report tiles

To run a 'Profit & loss' report:

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

	Custom date range 2023-07-13 to 2024-10-15	Fiscal year to date 2024-01-07 to 2024-10-15	
	Total	% of sales	Compared total
<input checked="" type="checkbox"/> Total sales	-\$91.65	100.00%	\$0.00
Food sales	-\$32.63	35.60%	\$0.00
Beer sales	-\$59.02	64.40%	\$0.00
<input checked="" type="checkbox"/> Total cost of goods	\$397,591.26	-433814.79%	\$373,597.39
<input checked="" type="checkbox"/> Labor Costs	\$1,201.73	-1311.22%	\$1,201.73

'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.

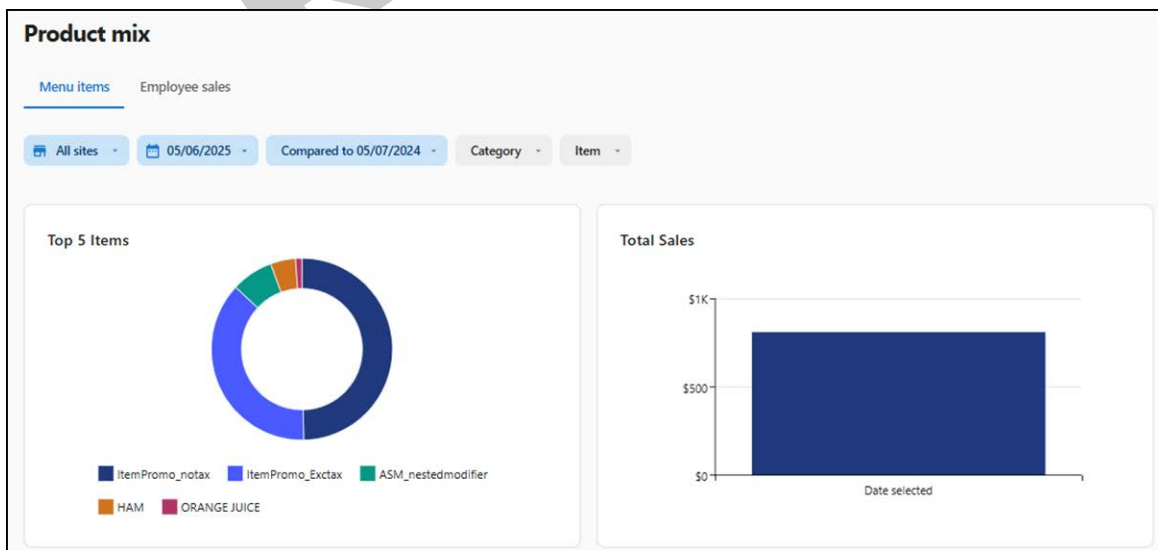
The report dynamically updates with each selected parameter.

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.
Compared total	Displays the total compared to the fiscal year. See "Configuring the fiscal calendar" on page 266 .
Compared % of sales	Displays the percentage of sales compared to the fiscal year.

Product mix

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

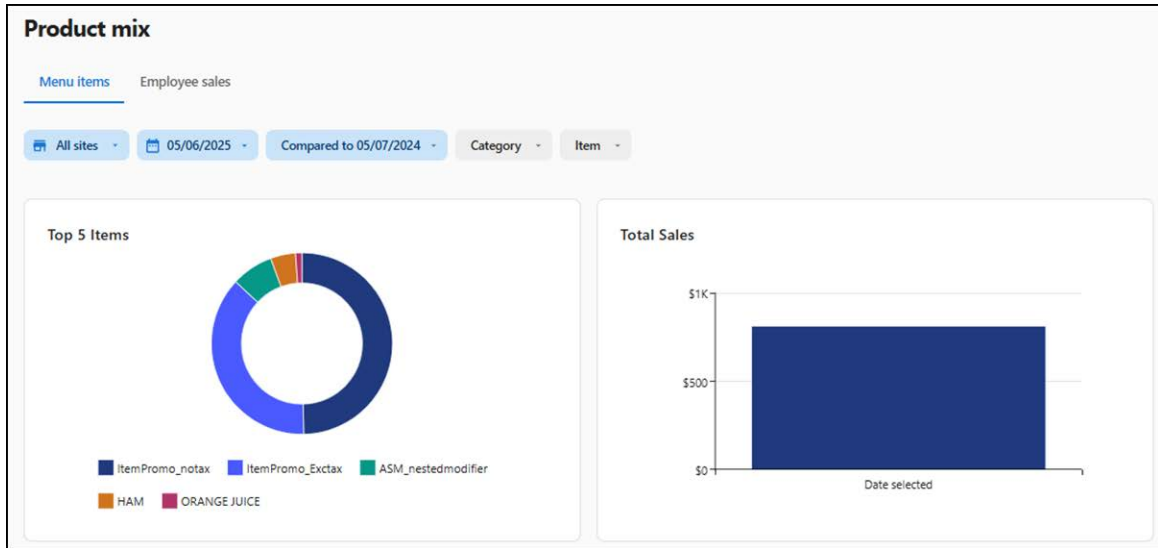


'Product mix' report - 'Menu items' view

The 'Product mix' report offers two views:

- Menu items
- Employee sales

'Menu items' view



'Product mix' report - 'Menu items' view

To run the 'Menu items' view:

1. Select **Sales > Report > Product mix > Menu items tab**. The **Menu items** view appears with the previous date selected by default.
2. Select a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select all Sites**.
3. Click **Reset** to reset the site selection.
4. Select a **date range** from the drop-down list.
5. Select a **Category** from the drop-down list.
6. Select an **item** to report from the drop-down list.

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

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

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

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

List modifiers with item sold											
Columns			Filters			Density			Search...		
Category	Parent Item Quantity	Modifier Quantity	Item Sales	% of Category Sales	% of Total Sales						
ASSEMBLY PROMOTION (3)	7	0	\$760.00	100.00%	93.93%						
ASSEMBLY_nestedmodifier	2	0	\$60.00	7.89%	7.42%						
ItemPromo_Exctax	3	0	\$300.00	39.47%	37.08%						
ItemPromo_notax	2	0	\$400.00	52.63%	49.44%						
BEVERAGES (1)	1	0	\$9.09	100.00%	1.12%						
ORANGE JUICE	1	0	\$9.09	100.00%	1.12%						
BRUNCH (1)	1	0	\$4.00	100.00%	0.49%						
BRUNCH #1	1	0	\$4.00	100.00%	0.49%						
SANDWICH (1)	3	0	\$36.00	100.00%	4.45%						
HAM	3	0	\$36.00	100.00%	4.45%						

Rows per page: 10 1-4 of 4

'Product mix' report - 'Total sales' view

The following information appears in the report:

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



Note

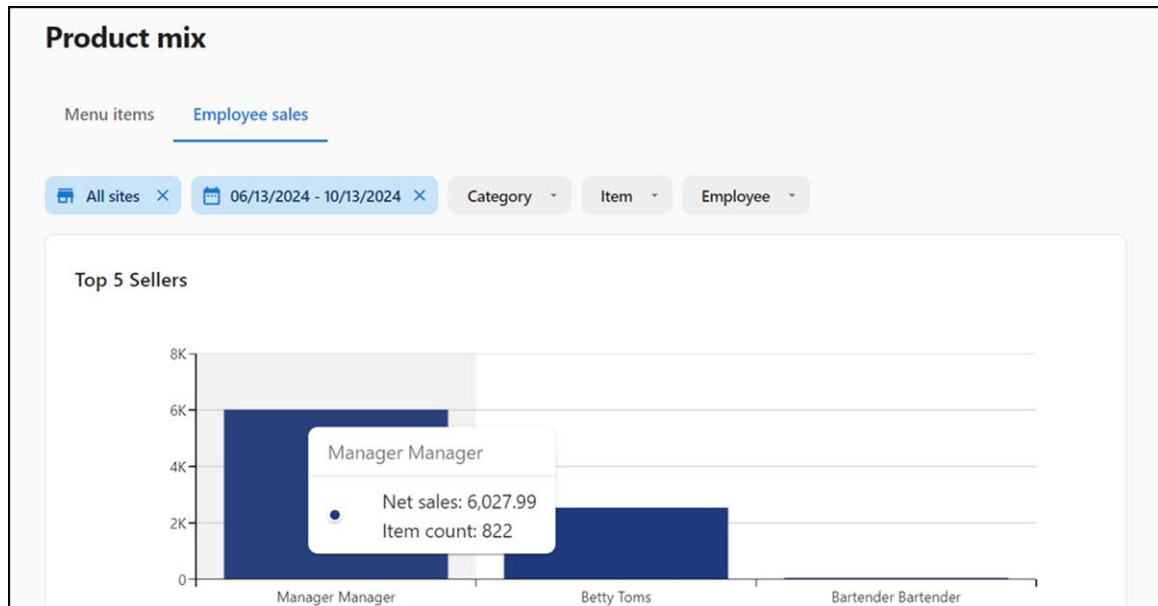
You can sort the items by clicking the pivot(>) next to each item of the first three columns. Clicking the pivot gives you detailed sales data of each item sold and also modifier data sold accordingly.

'Employee sales' view

To run the 'Employee sales' view:

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

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



'Product mix' report - 'Employee sales' view

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

Top 5 sellers — Displays the net sales amount in the form of bars for the top 5 employees. Hover over the bar to show the net sales and item count.

The following information appears in the report

Category	Parent Item Quantity	Item Sales
<ul style="list-style-type: none"> ▼ Hannah Fin (2) > SANDWICH (1) 	2	\$24.00
<ul style="list-style-type: none"> ▼ Jenna AC Employee 50 (4) > BEVERAGES (1) > SANDWICH (1) 	2	\$21.09
<ul style="list-style-type: none"> ▼ Rachel AC Employee 60 (4) > ASM PROMOTION (3) 	1	\$9.09
<ul style="list-style-type: none"> ▼ Sai Akash S (5) > ASM PROMOTION (2) > BRUNCH (1) 	1	\$12.00
	5	\$460.00
	5	\$460.00
	3	\$304.00
	2	\$300.00
	1	\$4.00

Rows per page: 10 ▾ 1-4 of 4 < >

Product mix report - List modifiers

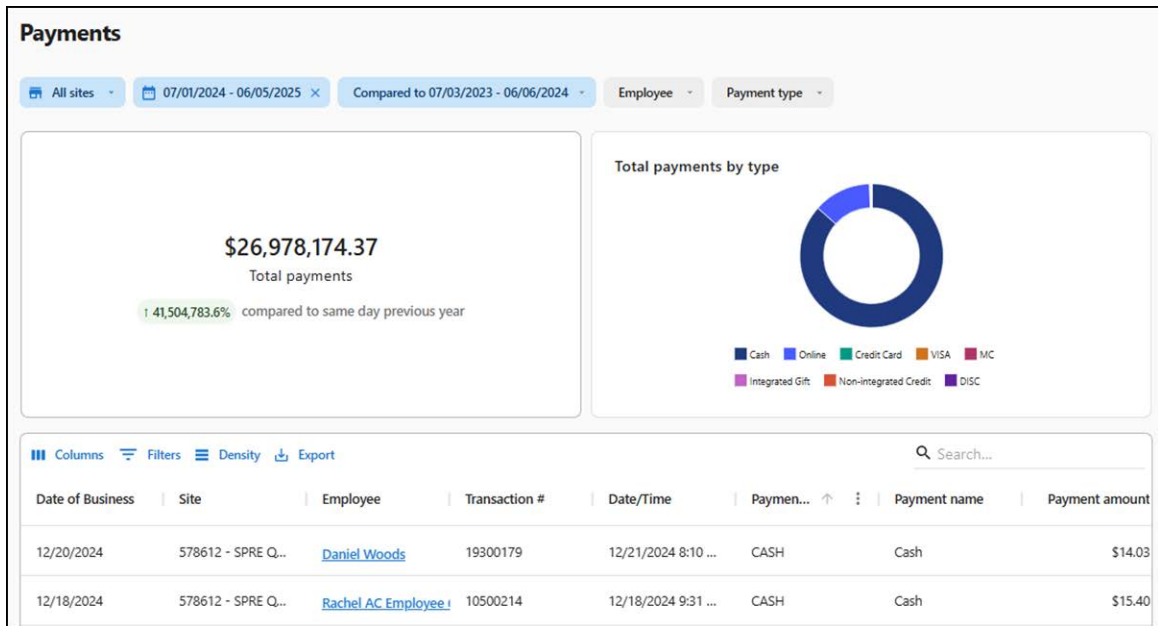
Column	Description
Category	Category of the item or a modifier.
Parent Item Quantity	Displays the quantity of parent item used.
Item sales	Displays the total amount of item sales.

To refine your search:

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

Payments

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

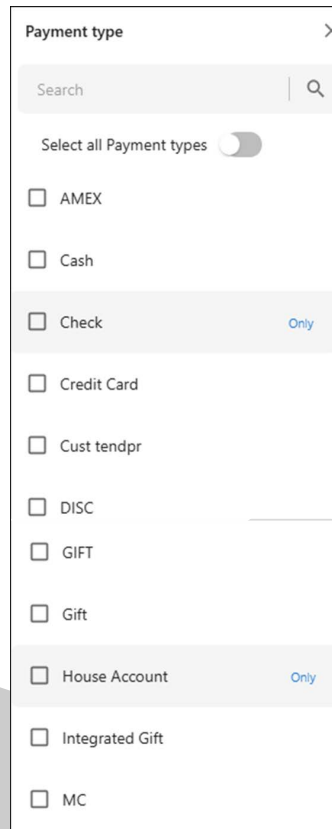


'Payments' report

To run the 'Payments' report:

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

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

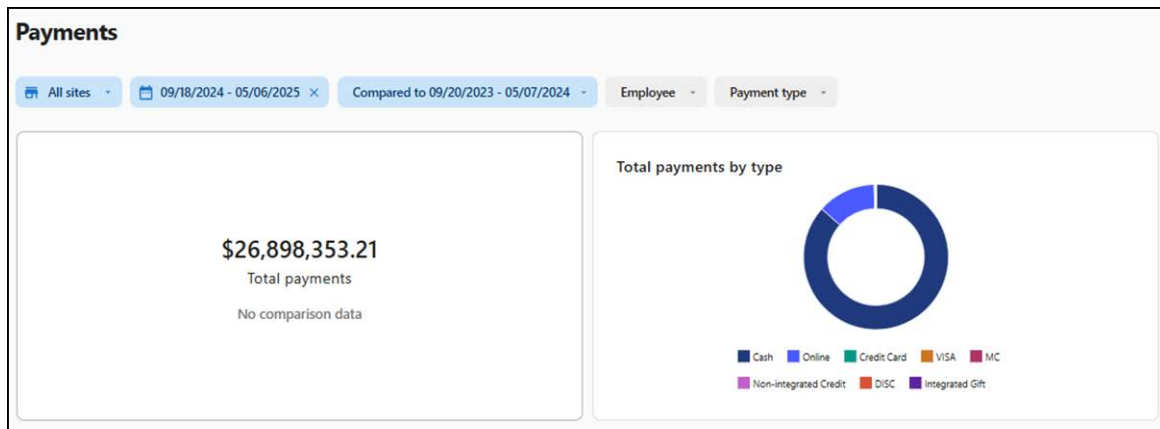


The screenshot shows a 'Payment type' dialog box with a search bar at the top. Below the search bar is a toggle switch for 'Select all Payment types'. A list of payment types follows, each with a checkbox and a label: AMEX, Cash, Check (highlighted in grey with a blue 'Only' label to its right), Credit Card, Cust tendpr, DISC, GIFT, Gift, House Account (highlighted in grey with a blue 'Only' label to its right), Integrated Gift, and MC.

Payment type

6. To refine your search you can select multiple/all the **Payment type** to view the data.
You can select /multiple/all employees from the drop-down list to view the payment data specific to the selected employees.

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



'Payments' and 'Total payments by type'

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

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

Date of Business	Site	Employee	Transaction #	Date/Time	Payment type	Payment name	Payment amount
12/20/2024	578612 - SPRE Q...	Daniel Woods	19300179	12/21/2024 8:10 ...	CASH	Cash	\$14.03
12/18/2024	578612 - SPRE Q...	Rachel AC Employee 1	10500214	12/18/2024 9:31 ...	CASH	Cash	\$15.40
12/18/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500212	12/18/2024 8:30 ...	CASH	Cash	\$63.25
12/18/2024	578612 - SPRE Q...	Michael AC Employee	10500223	12/18/2024 2:54 ...	CREDIT_CARD	Credit Card	\$284.80
12/18/2024	578612 - SPRE Q...	Martha AC Employee	10500221	12/18/2024 2:52 ...	CASH	Cash	\$187.00
12/18/2024	578612 - SPRE Q...	Sam AC Employee 40	10500219	12/18/2024 2:49 ...	CREDIT_CARD	Credit Card	\$110.50
12/18/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500217	12/18/2024 2:47 ...	CASH	Cash	\$8.25
12/17/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500208	12/17/2024 12:00...	CASH	Cash	\$7.70
12/17/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500207	12/17/2024 11:59...	CREDIT_CARD	Credit Card	\$127.50
12/17/2024	578612 - SPRE Q...	Jenna AC Employee 5	10500206	12/17/2024 11:58...	CREDIT_CARD	Credit Card	\$55.25

'Payments' summary

The following information appears in the report:

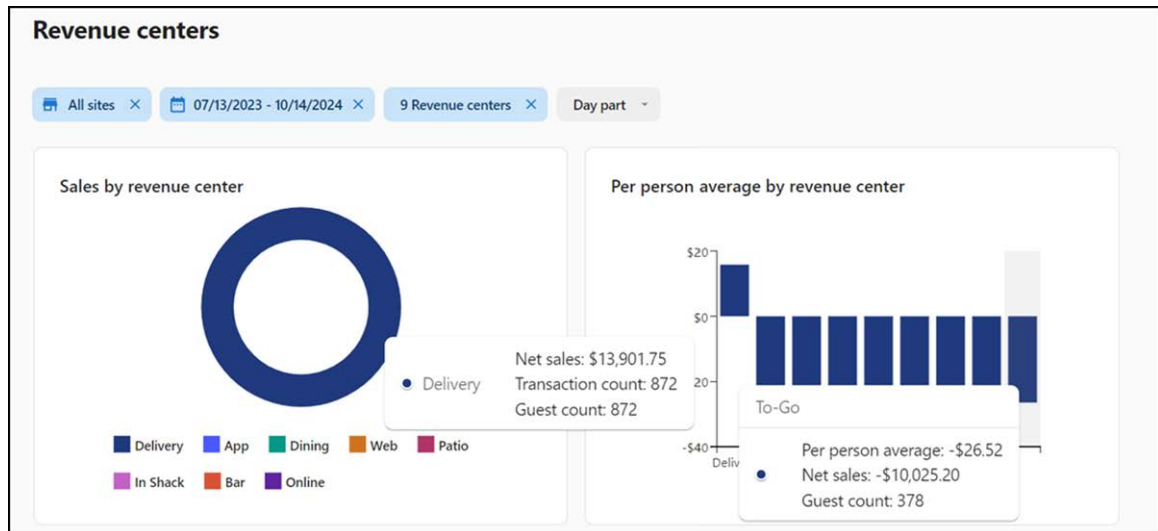
Column	Description
Date of Business	The date of transaction.
Site	Name of the site or store.
Employee	Name of the employee.
Transaction#	Transaction number for reference.
Date/Time	Date and time of the transaction.
Payment type	Type of payment made by cash, card etc.
Payment name	The type of payment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

 **Note**

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

Revenue centers

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



'Revenue centers' report

To run the 'Revenue centers' report:

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

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

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

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



Note

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

Site	Net sales	Tax amount	Discount amount	Other charges amount	Refunds	Gr...	Transaction cour
578612 - SPRE QA[ASM][E2Ete	\$24,157,41...	\$2,515,553....	\$102,037.79	\$15,548.00	\$13,763.76	\$24,276,56...	2,05
- (6)	\$3,025,752....	\$416,021.24	\$768.33	\$14,240.00	\$13,763.76	\$3,042,509....	1,07
2024.12 (2)	\$1,660.66	\$91.02	\$82.00	\$0.00	\$0.00	\$1,769.25	1
Dev1_revcenter (5)	\$32,748.92	\$1,255.88	\$159.75	\$100.00	\$0.00	\$33,066.72	17
PAT (2)	\$340.25	\$34.02	\$0.00	\$0.00	\$0.00	\$340.25	
Phase 2 Regression (6)	\$36,581.03	\$2,562.48	\$652.02	\$280.00	\$0.00	\$37,648.46	36
Pulse App Testing (5)	\$21,034,90...	\$2,094,044....	\$100,190.97	\$627.00	\$0.00	\$21,135,12...	33
Raj (2)	\$1,300.00	\$125.00	\$0.00	\$0.00	\$0.00	\$1,300.00	
Rakesh N (1)	\$42.50	\$6.50	\$5.00	\$0.00	\$0.00	\$47.50	
Revcenterin (1)	\$300.00	\$15.00	\$0.00	\$0.00	\$0.00	\$300.00	
Revenue Center1 (1)	\$1,245.45	\$69.55	\$0.00	\$0.00	\$0.00	\$1,300.00	
Revenue Center2 (1)	\$300.00	\$0.00	\$0.00	\$0.00	\$0.00	\$300.00	
Test Rakesh Bar (2)	\$5,436.36	\$238.64	\$0.00	\$0.00	\$0.00	\$5,600.00	
TestRC1 (1)	\$672.81	\$57.10	\$2.00	\$0.00	\$0.00	\$700.00	
Testing Rakesh (4)	\$12,904.24	\$922.10	\$177.72	\$301.00	\$0.00	\$13,329.34	5
Update RC 1 (1)	\$24.00	\$5.30	\$0.00	\$0.00	\$0.00	\$24.00	
rev_cat (2)	\$900.00	\$15.00	\$0.00	\$0.00	\$0.00	\$900.00	
revadd (1)	\$2,300.00	\$90.00	\$0.00	\$0.00	\$0.00	\$2,300.00	

'Revenue centers' report view

The following information appears in the report:

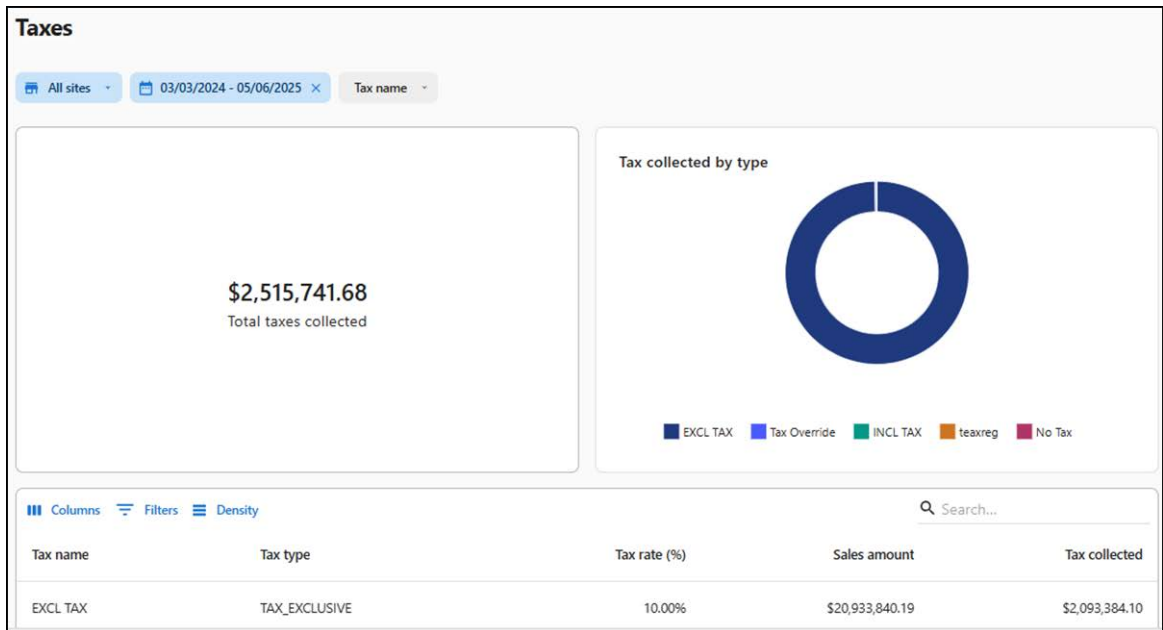
Column	Description
Site	Name of the site or store.

Column	Description
Net Sales	The net sales after required exemption.
Tax amount	Total amount of taxes collected for a transaction.
Discount amount	Total amount of discounts, such as vouchers, coupons, and more.
Other charges amount	Total amount of surcharges applied to a transaction.
Refunds	Refund of the tax amount.
Gross sales	Gross sales of a transaction.
Transaction count	Count of closed/non-voided transactions.
Guest count	Total number of guests served on a transaction.
Per person average	Net sales of a transaction are divided by the number of guests on the transaction.
Transaction average	Total net sales divided by the number of non-voided transactions.

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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.

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

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

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

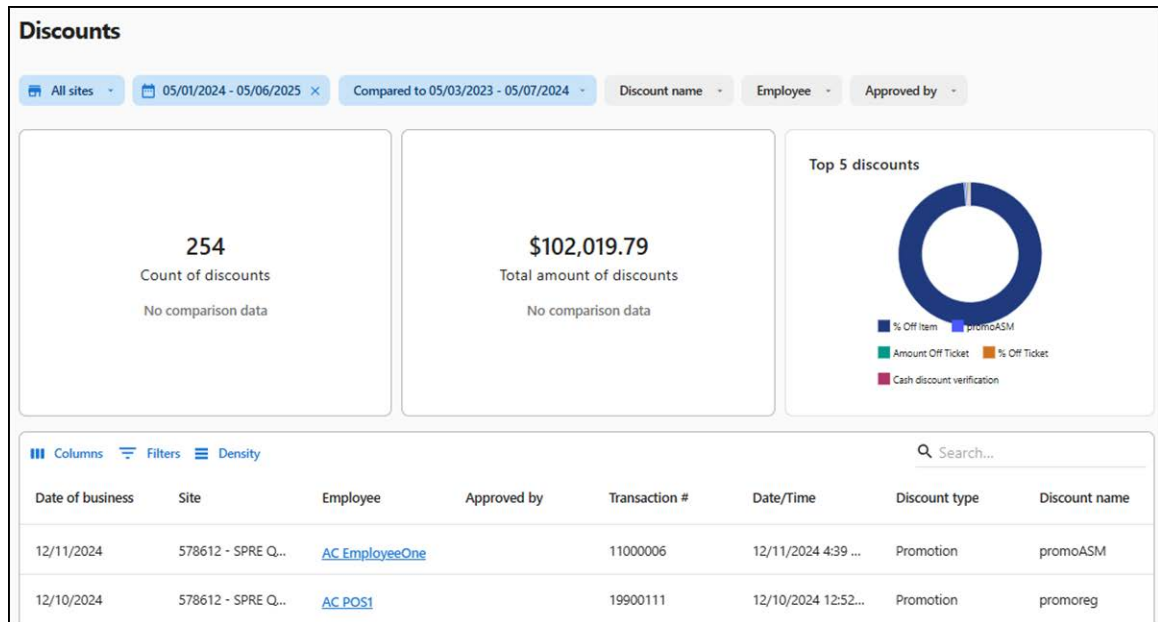
'Taxes' summary

The following information appears in the report:

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

Discounts

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



'Discounts' report

To run the 'Discounts' report:

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

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

Count of discounts — Displays the total number of discounts.

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

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

Date of business	Site	Employee	Approved by	Transaction #	Date/Time	Discount type	Discount name
12/11/2024	578612 - SPRE Q...	AC EmployeeOne		11000006	12/11/2024 4:39 ...	Promotion	promoASM
12/10/2024	578612 - SPRE Q...	AC_POS1		19900111	12/10/2024 12:52...	Promotion	promoreg
12/10/2024	578612 - SPRE Q...	AC_POS1		19900111	12/10/2024 12:52...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	AC_POS1		19900105	12/09/2024 2:59 ...	Promotion	promoreg
12/09/2024	578612 - SPRE Q...	AC_POS1		19900103	12/09/2024 2:50 ...	Promotion	promoASM
12/09/2024	578612 - SPRE Q...	AC_POS1		19900107	12/09/2024 3:13 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	Daniel Woods		19300160	12/09/2024 10:19...	Comp	\$1.00 Off
12/09/2024	578612 - SPRE Q...	AC_POS1		19900103	12/09/2024 2:50 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	AC_POS1		19900105	12/09/2024 2:59 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	Daniel Woods		19300160	12/09/2024 10:19...	Comp	\$1.00 Off
12/09/2024	578612 - SPRE Q...	AC_POS1		19900103	12/09/2024 2:50 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	AC_POS1		19900105	12/09/2024 2:59 ...	Comp	Amount Off Item
12/09/2024	578612 - SPRE Q...	AC_POS1		19900107	12/09/2024 3:13 ...	Promotion	promoreg

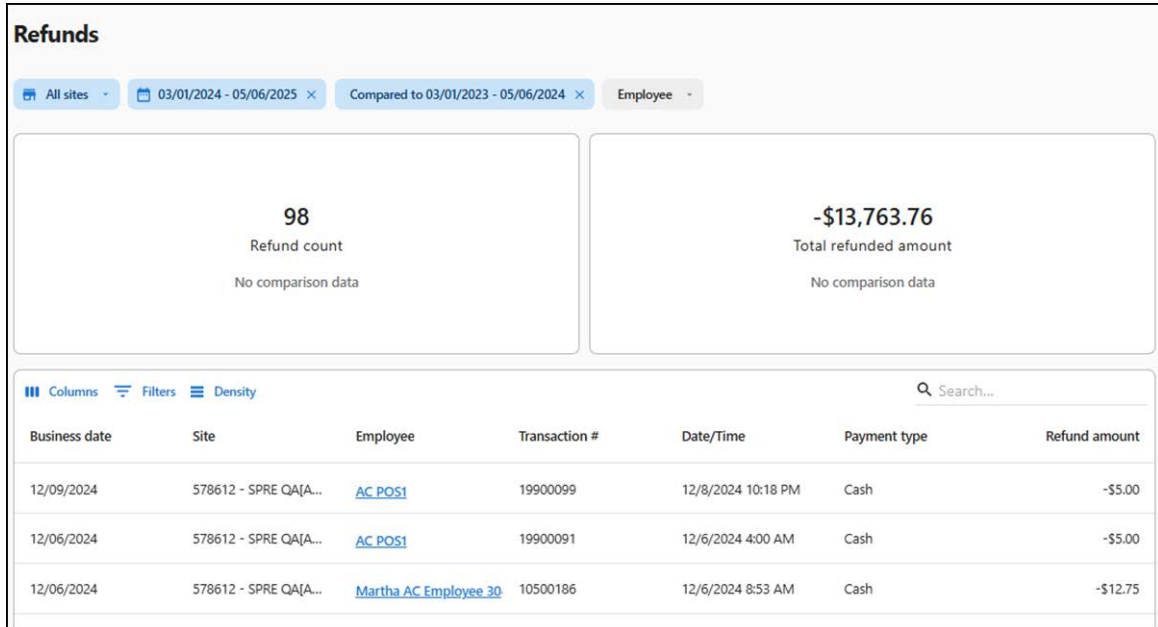
'Discounts' report

The following information appears in the report:

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

Refunds

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



Refunds

All sites | 03/01/2024 - 05/06/2025 | Compared to 03/01/2023 - 05/06/2024 | Employee

98
Refund count
No comparison data

-\$13,763.76
Total refunded amount
No comparison data

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

'Refunds' report

To run the 'Refunds' report:

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

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

Refund count — Displays the total number of refunds issued.

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

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

Rows per page: 10 1-10 of 98

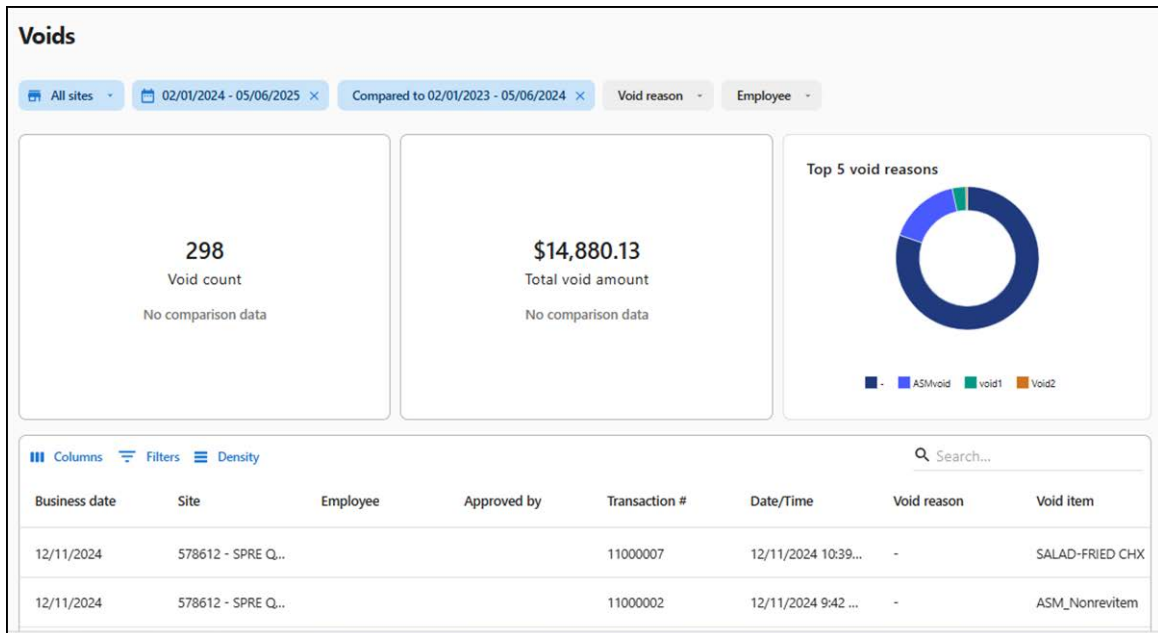
'Refunds' report

The following information appears in the report:

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

Voids

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



'Voids' report

To run the 'Voids' report:

1. Select **Sales > Report > Voids**. The 'Voids' report for the previous day appears by default.
2. Select a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select all Sites**.
3. Select a **date range** from the drop-down list.
4. Select the **Void name** from the drop-down list.
5. Select the **Employee** from the drop-down list.

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

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

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

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

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.

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

'Transactions' report

To run the Transactions view:

1. Select **Sales > Transactions**. The 'Transactions view' for the previous day appears by default.
2. Select a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select all Sites**.
3. Click **Reset** to reset the site selection.
4. Select a **date range** or select from the list on the left side of the drop-down.
5. Select the **Transaction type** from the drop-down list.

The following information appears in the report:

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

To view any transaction detail

1. Click any **transaction**.

The screenshot shows the 'Transactions' report interface. On the left, a table lists transactions with columns for Business date, Site, Transaction #, and Employee. The transaction with ID 10400001 is selected. On the right, a slide-out window displays the details for Transaction #10400001, including site information, business date, terminal, and a breakdown of items and taxes.

Site	SPRE QA[ASM] [E2Etest1]	Business date	5/30/2024
Table name	-	Terminal	MOBILE2
Transaction opened	5/30/2024 7:53 AM	Transaction closed	5/29/2024 11:02 PM
Employee name	Online User	Customer name	Naga
Guest count	1		

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

Transaction details

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

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

Transaction #10400001			
Site	SPRE QA[ASM] [E2ETest1]	Business date	5/30/2024
Table name	-	Terminal	MOBILE2
Transaction opened	5/30/2024 7:53 AM	Transaction closed	5/29/2024 11:02 PM
Employee name	Online User	Customer name	Naga
Guest count	1		
<hr/>			
HAM	1		\$70.00
1x AVOCADO			\$6.00
<hr/>			
	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.

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:

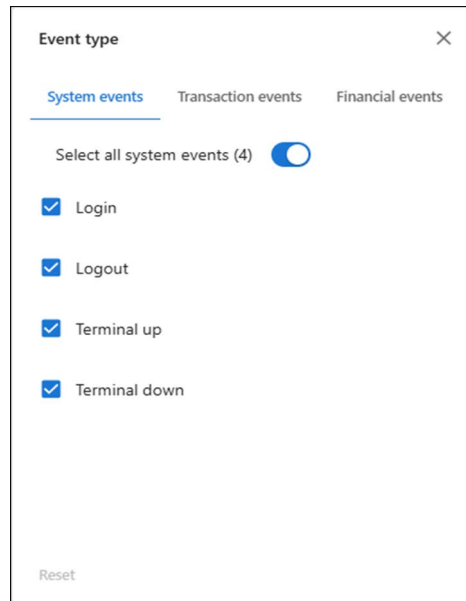
1. Select **Sales > POS event log**. The 'POS event log' screen appears.

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

'POS event log' screen

2. Select a **site** from the **All sites** drop-down list to report. You can toggle the list to **Select all Sites**.
3. Click **Reset** to reset the site selection.
4. Select a **date range** to report from the drop-down list.
5. Select the **Employee** to report from the drop-down list.
6. Select the **Terminal** to report from the drop-down list.
7. Select the **Event type** to report from the drop-down list.

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



'POS event log' - Event type selection

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

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

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

The following information appears in the report:

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

DRAFT

Working with reports menu

In Aloha Smart Manager (ASM), reports are structured, cloud-based analytical views that help restaurant managers monitor and understand key aspects of their business, especially sales performance, profits, and operational metrics. Reports in ASM provides detailed insights into many operational areas and allows managers to track trends, troubleshoot issues, and make informed decisions.

With ASM reports, managers can:

- Monitor financial health and profitability.
- Track sales trends and item performance.
- Identify excessive discounts, voids, and refunds.
- Analyze labor or scheduling in conjunction with sales peaks.
- Support accounting, payroll, and inventory accuracy.

Overall, the Reports screen is a centralized location for accessing key operational reports across labor, inventory, and sales to support business insights and decision-making.

Accessing reports menu

The **Reports** section in the Aloha Smart Manager provides a centralized platform to access and manage reports across key modules such as Sales, Labor, and Inventory. It enables users to easily navigate to any report category, view and analyze data, and mark frequently used reports as favorites for quick access. Additionally, the section offers flexibility to create custom reports tailored to specific

business needs and instantly generate them for real-time insights. This streamlined approach helps restaurant managers make informed decisions efficiently, all from one convenient location.

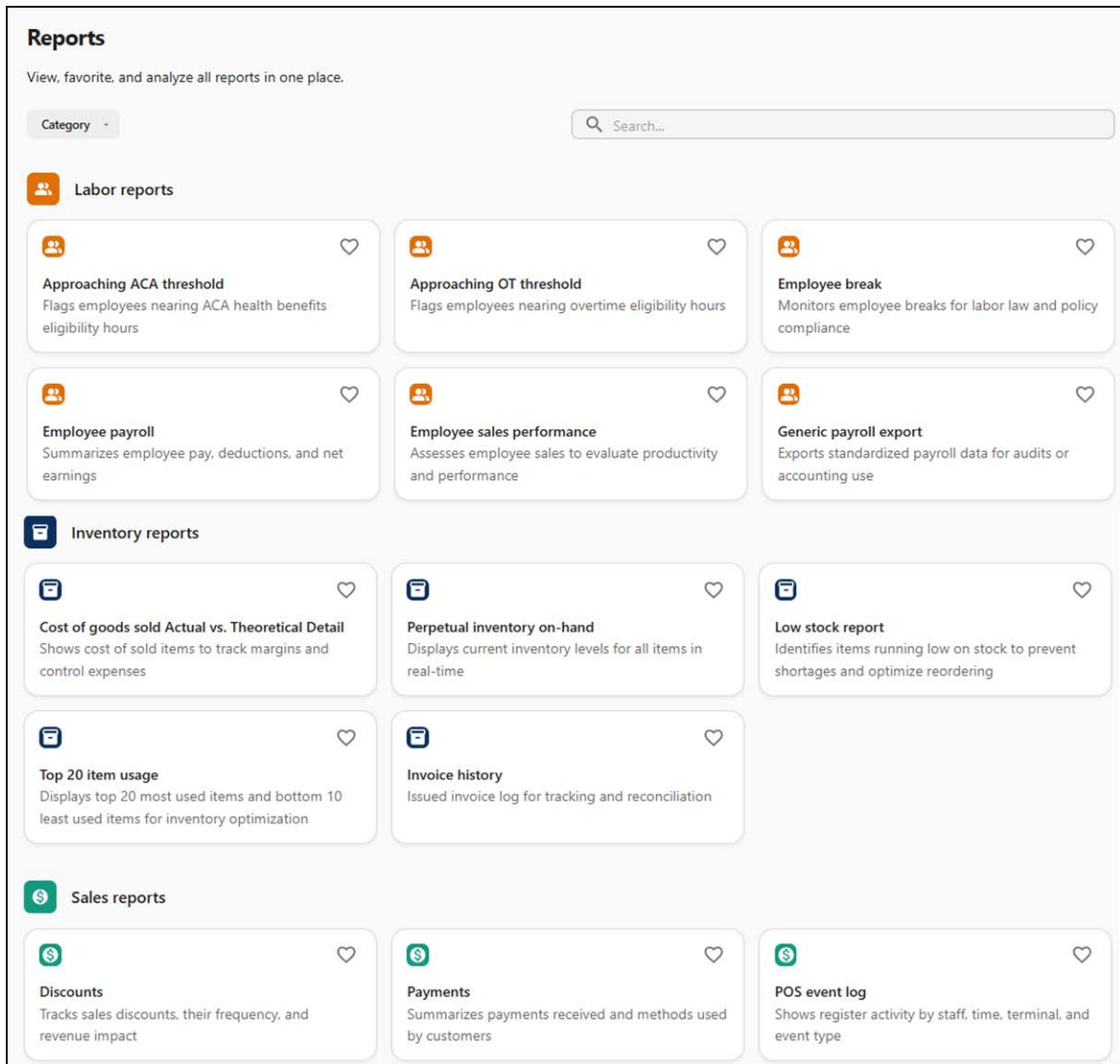


Figure 1 'Reports' screen

To navigate the reports:

1. Select the **Reports** menu. The 'Reports' screen appears.

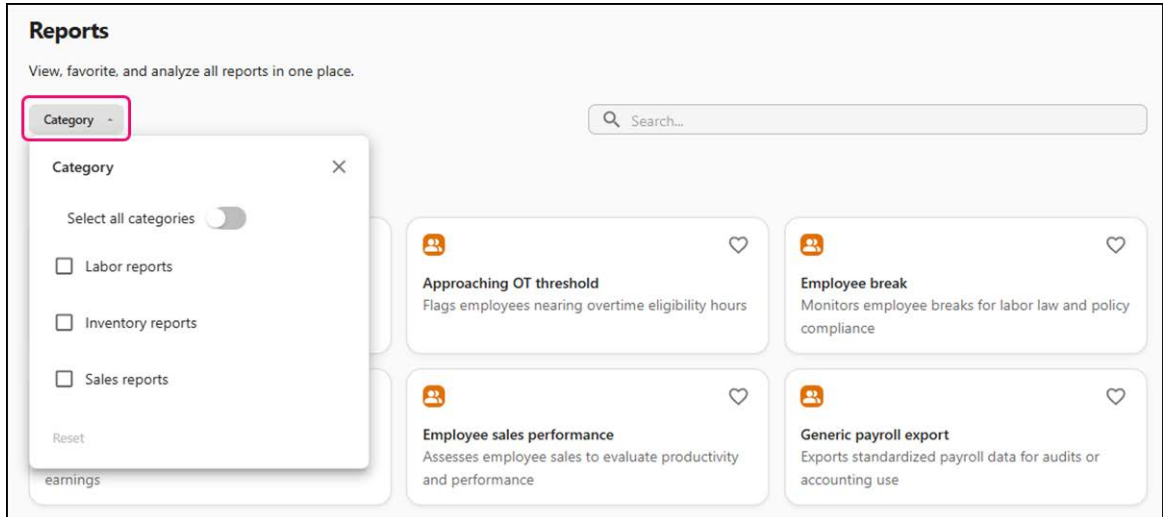


Figure 2 Category in reports

2. Select a **Category** from the **Category** drop-down list. You can toggle the list to **Select all Categories**.
 3. Click **Reset** to reset the category or status selection.
- The system displays the appropriate reports according to the selected parameters.

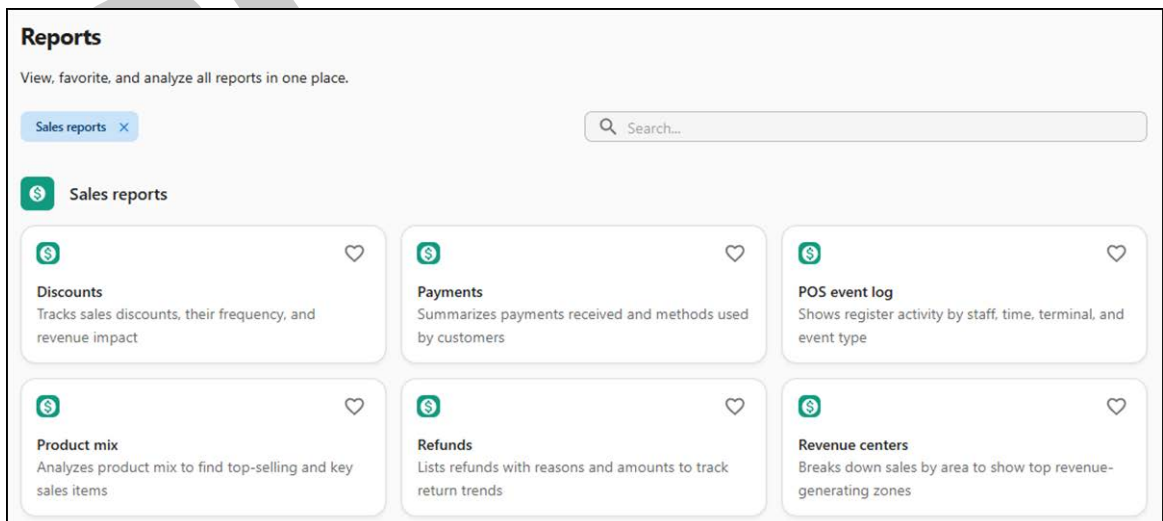


Figure 3 Reports screen

4. Click the 'heart icon' to mark reports you frequently use as **Favorites**. Use the search bar at the top right of the screen to find the report you need.

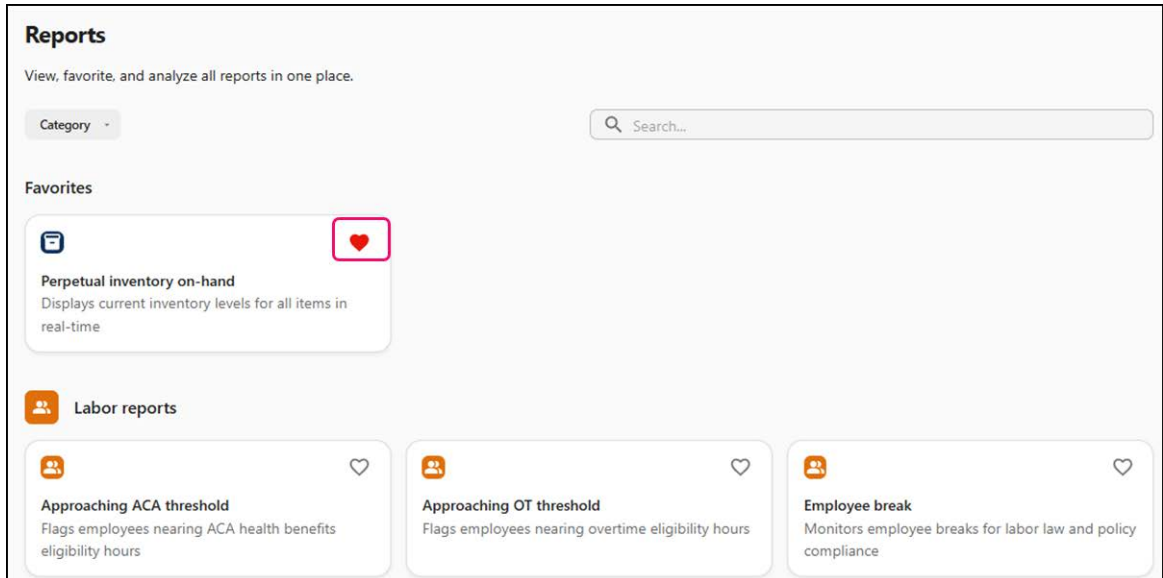


Figure 4 'Favorites' screen

You can select any report on the **Reports** home screen under **Labor, Inventory, or Sales** if you prefer not to customize it, or you can apply filters later as needed.

Report types

There are multiple reports in ASM:

Report types	Description	Reports
Labor	Monitor employee activity and labor compliance, including overtime thresholds, ACA eligibility, breaks, payroll summary, and sales performance.	<ul style="list-style-type: none"> • Approaching ACA threshold • Approaching overtime threshold • Employee break • Employee payroll • Employee sales performance • Generic payroll export • Employee tip • Interval sales and labor
Inventory	Track inventory health through cost of goods sold, on-hand stock levels, low-stock alerts, item usage trends, and invoice history.	<ul style="list-style-type: none"> • Invoice history • COGS Actual vs. Theoretical Detail • Top 20 item usage • Perpetual inventory on-hand • Low stock report
Sales	Review sales performance and transaction activity through reports on discounts, payments, POS events, product mix, refunds, and revenue centers.	<ul style="list-style-type: none"> • Sales summary • Profit & loss • Product mix • Payments • Revenue centers • Taxes • Discounts • Refunds • Voids

Customizing a report

Use the 'Custom reports' option to create reports based on the user's selected data category such as sales, labor, or any other available module. You can adjust report layouts, select specific data fields, and apply filters to generate accurate and relevant insights. You can build custom reports for sales, labor, or other operational areas to support better decision making and meet specific business needs.

To create a custom report

1. Select the **Reports** menu. The 'Reports' screen appears.

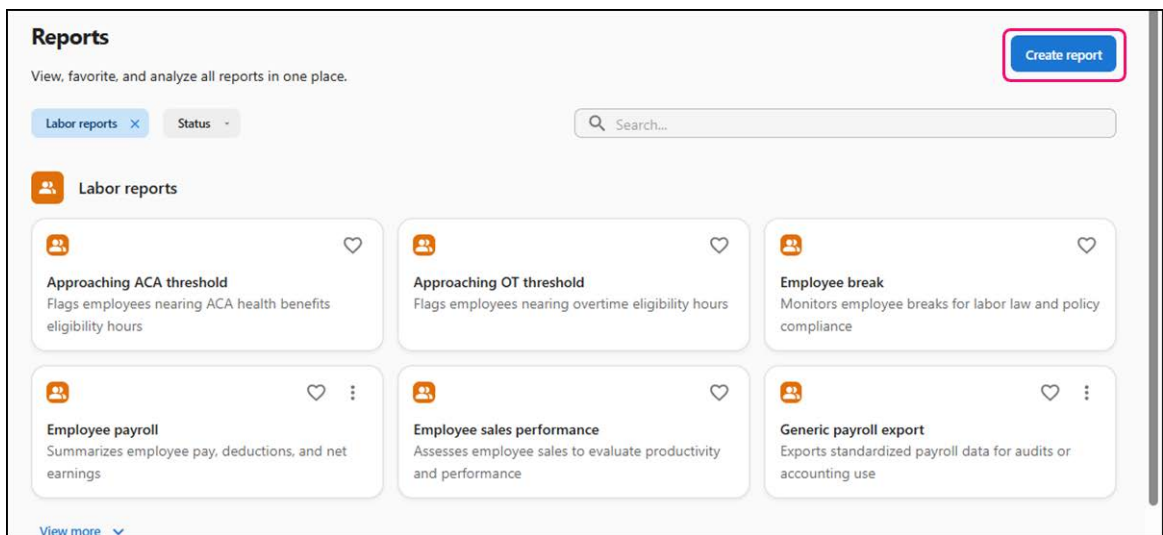


Figure 5 Create report option

2. Click **Create report**. The 'Create report' window appears.

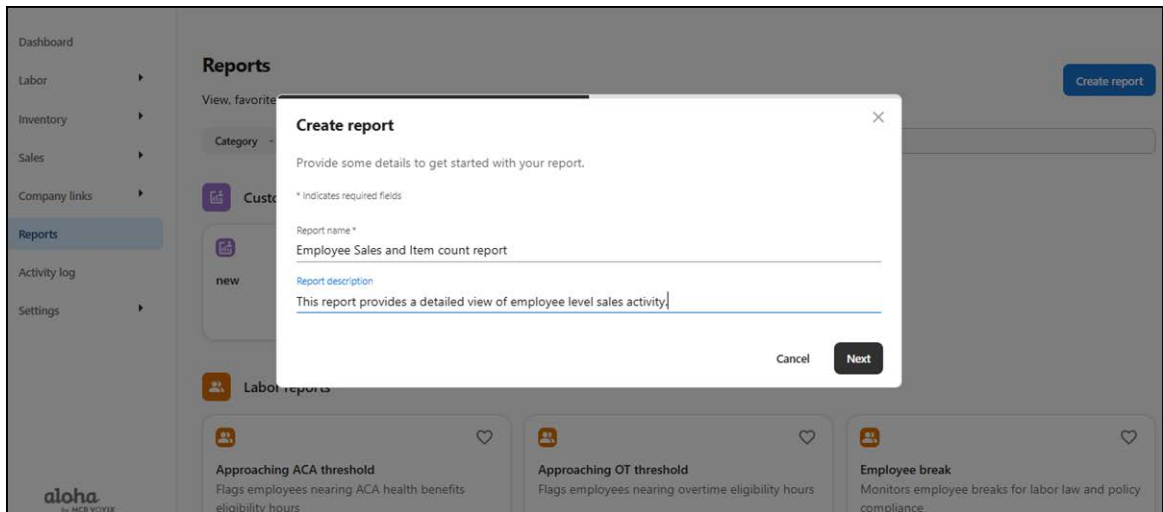


Figure 6 'Create report' window

3. Type a **Report name** for the report. This is a required option.
4. Type the **Report description** for the report. Enter a short description that helps users understand what the report contains.

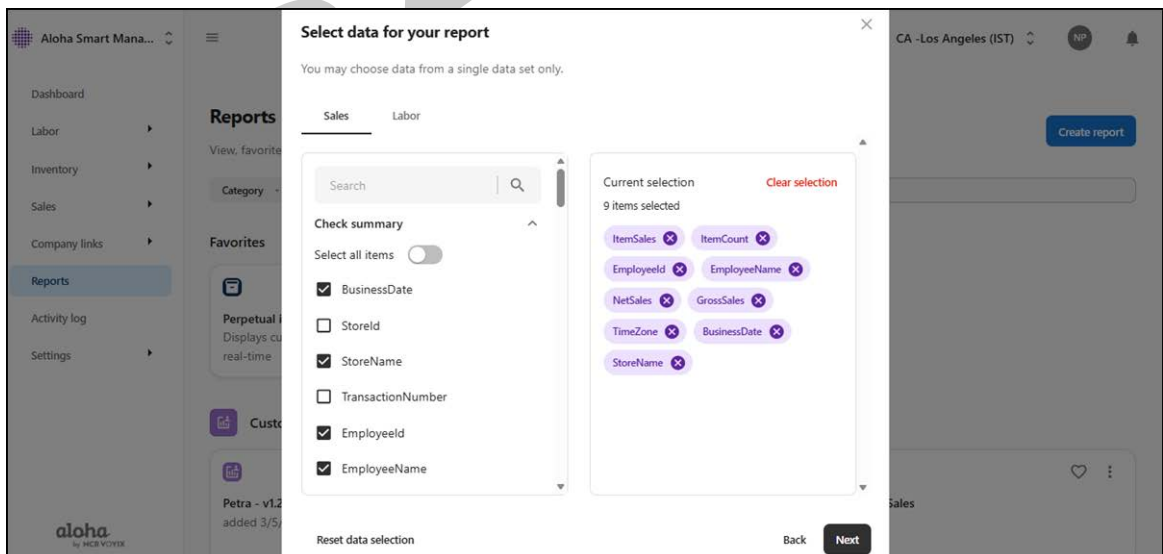


Figure 7 'Select data for your report'

5. Click **Next**. The select data pop-up window opens, displaying options to customize the report.
6. Choose from **Sales** or **Labor** to report.
7. Choose from **Check summary** or **Item sales** or **Item discounts** to select the items from the drop-down list. Toggle the **Select all items** to select all items from the list. The items selected

appears under the **Current selection** box. You can use **Clear selection** to remove all selected items from the list.

Note

You can choose only one option at a time from **Check Summary**, **Item Sales**, or **Item Discounts**. When one option is selected, the other two gets disabled.

8. Click **Next**. The report dynamically updates with each selected parameters and appear on the **Create report** page.

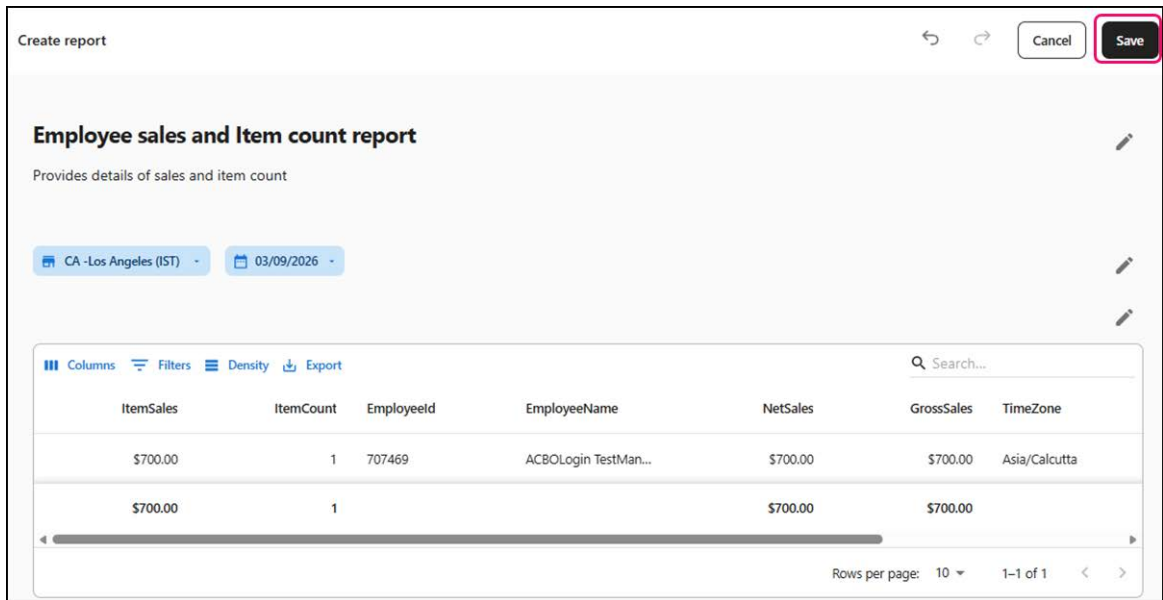


Figure 8 Create report

9. Click **Save** or click **Cancel** to cancel the report. A success message appears and automatically dismisses..

Note

You can edit any section of the report, such as the **report details**, **filter bar**, and **data table**, by clicking the pencil icon next to each section before saving the report.

To edit a custom report:

You can create, update, or delete custom reports according to your business needs.

1. Select the **Reports** menu. The 'Reports' screen appears.

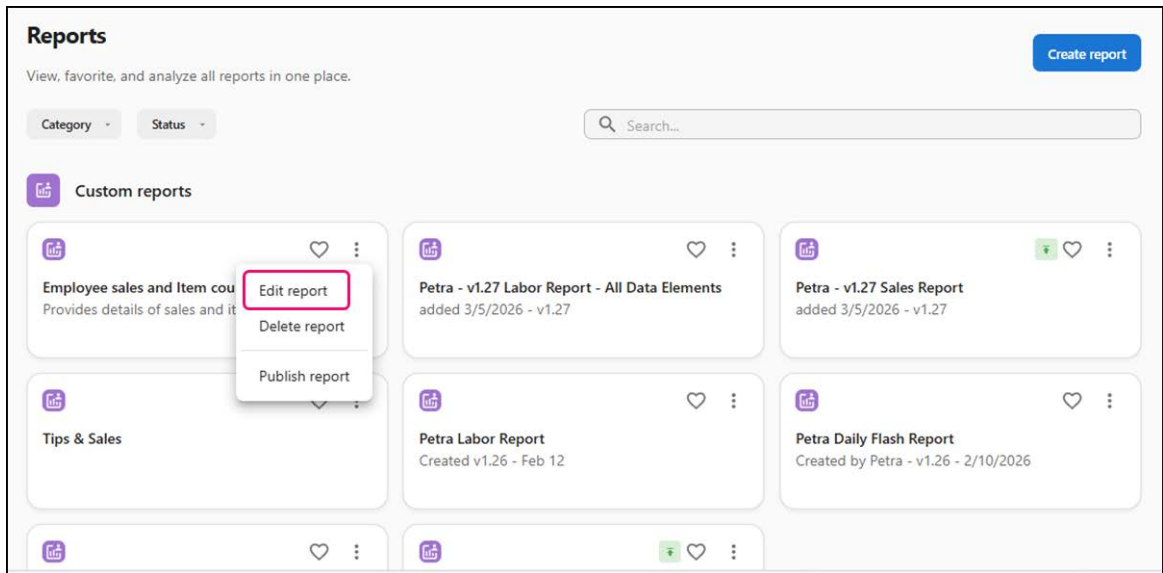


Figure 9 Edit report

2. Click the **three dots** in the top-right corner of the report you want to edit.
3. Click **Edit report**. The 'Edit report' screen appears.

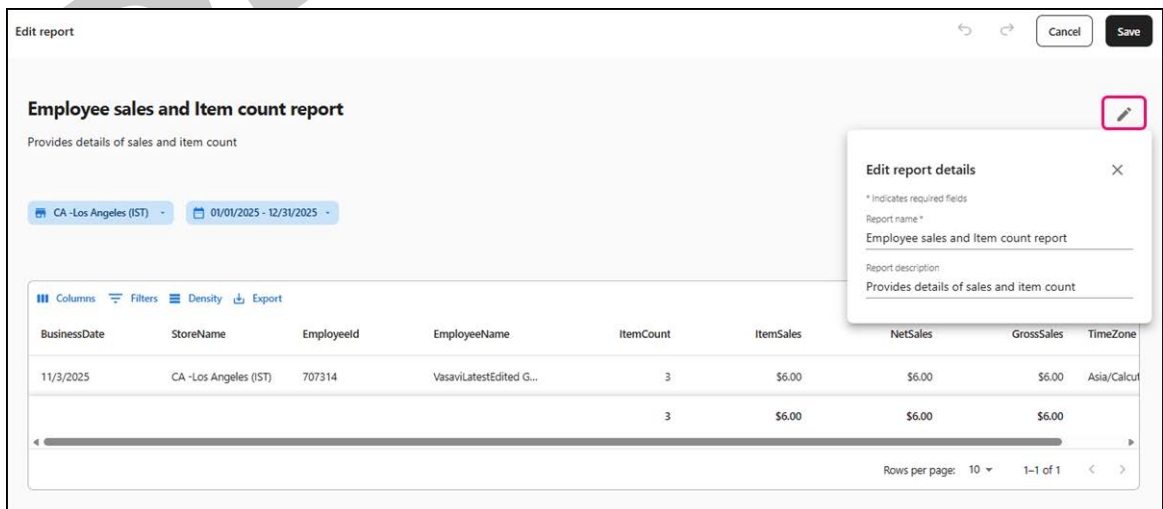


Figure 10 Edit report details

4. Click the **pencil** icon next to the report details. The 'Edit report details' window appears. Make the necessary changes.

5. Select the **site(s)** from the drop-down or toggle the list to **Select all sites**.
6. Select a **date range** from the drop-down list.

Employee sales and Item count report

Provides details of sales and item count

CA - Los Angeles (IST) 01/01/2025 - 12/31/2025

BusinessDate	StoreName	EmployeeId	EmployeeName	ItemCount	ItemSales	NetSales	GrossSales	TimeZone
11/3/2025	CA - Los Angeles (IST)	707314	VasaviLatestEdited G...	3	\$6.00	\$6.00	\$6.00	Asia/Calcut
				3	\$6.00	\$6.00	\$6.00	

Rows per page: 10 1-1 of 1

Figure 11 Edit data table

7. Click the **pencil** icon next to the data table and select **Edit data table**. The 'Edit data table' pop-up window opens, displaying options to customize the report.
8. Make the **necessary edits** and click **Save**. A success message appears and automatically dismisses.

To delete a custom report:

1. Select the **Reports** menu. The 'Reports' screen appears
2. Click the **three dots** in the top-right corner of the report you want to delete.

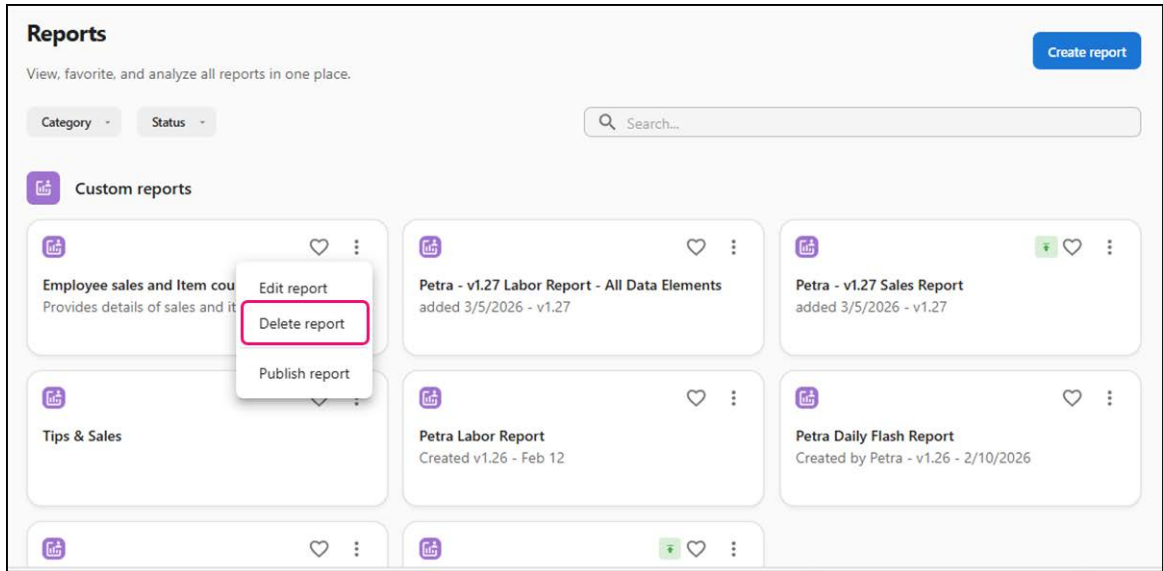


Figure 12 Delete report

3. Click **Delete report**. A confirmation message to delete the report appears.

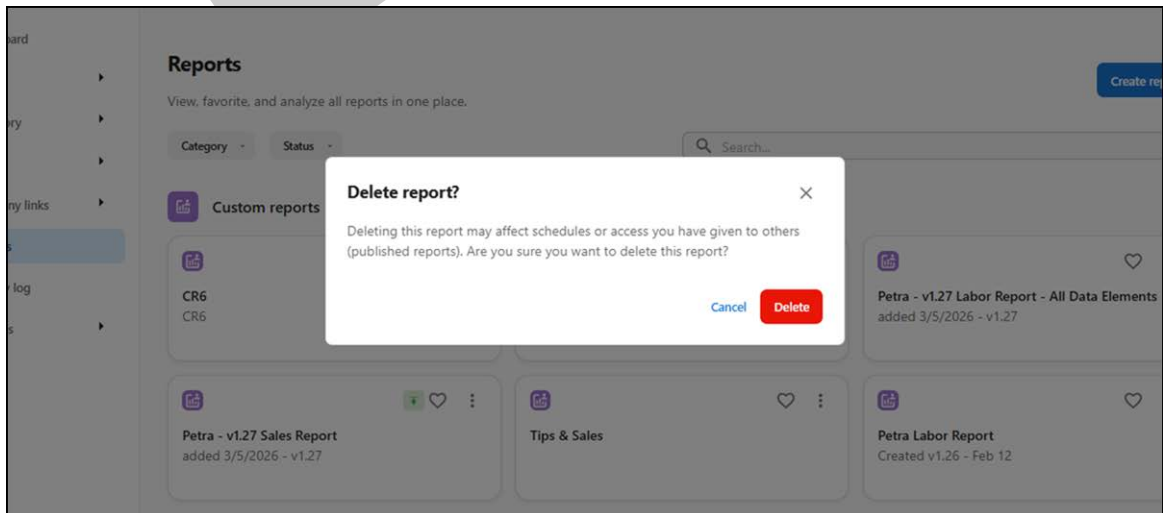


Figure 13 Confirmation message

4. Click **Delete** to confirm. A success message appears and automatically dismisses.

Publishing a report

You can publish a custom report to make it available to specific users or user roles based on your requirements. When you assign the report to selected users or roles, they can access and use the report as needed. You can also manage published access by adding more users or removing existing ones at any time.

To publish a custom report:

1. Select the **Reports** menu. The 'Reports' screen appears.
2. Click the **three dots** in the top-right corner of the report you want to publish.

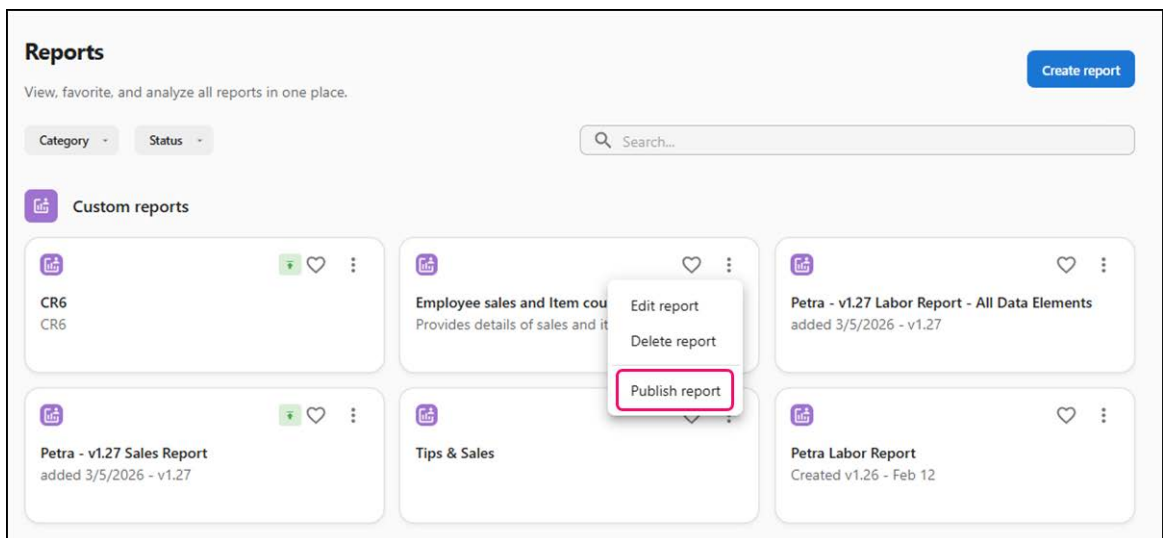


Figure 14 'Publish' report

3. Click **Publish report**. The select data pop-up window opens, displaying options to select the **Individuals** or **User roles**.

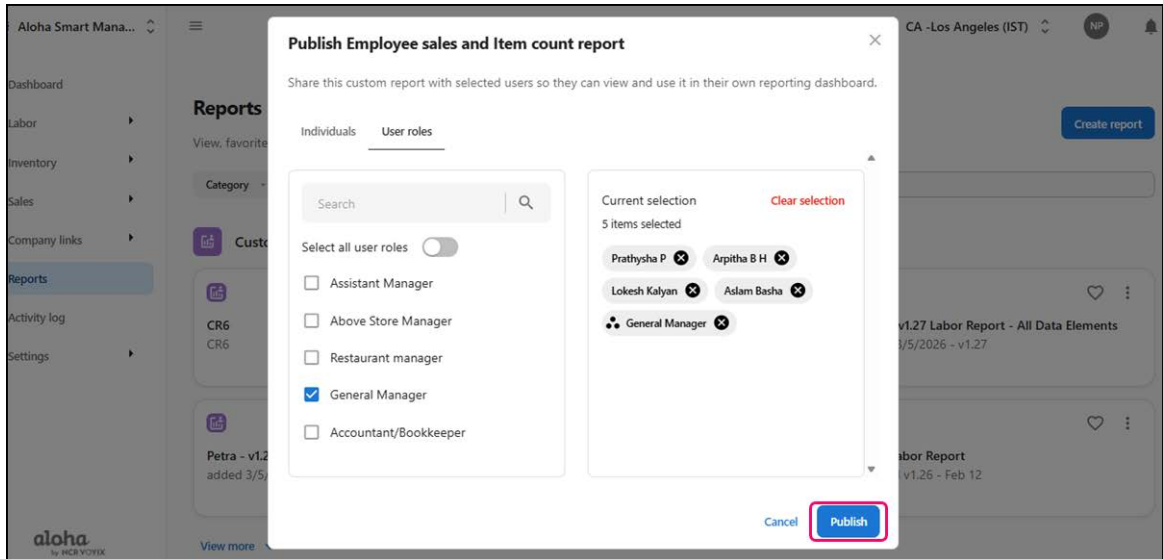


Figure 15 Select options to publish

4. Select from **Individuals** and **User roles**. You can select from both 'Individuals' and 'User roles,' and you can choose multiple users and roles as needed. The selected users gain access to the report and can view and use it in their reporting dashboard.
Toggle the **Select all individuals** or **Select all user roles** to select all options in the list. The options you select appear in the **Current selection** box. Use **Clear selection** to remove all selected options from the list.

5. Click **Publish** to publish the report. A success message appears and automatically dismisses.

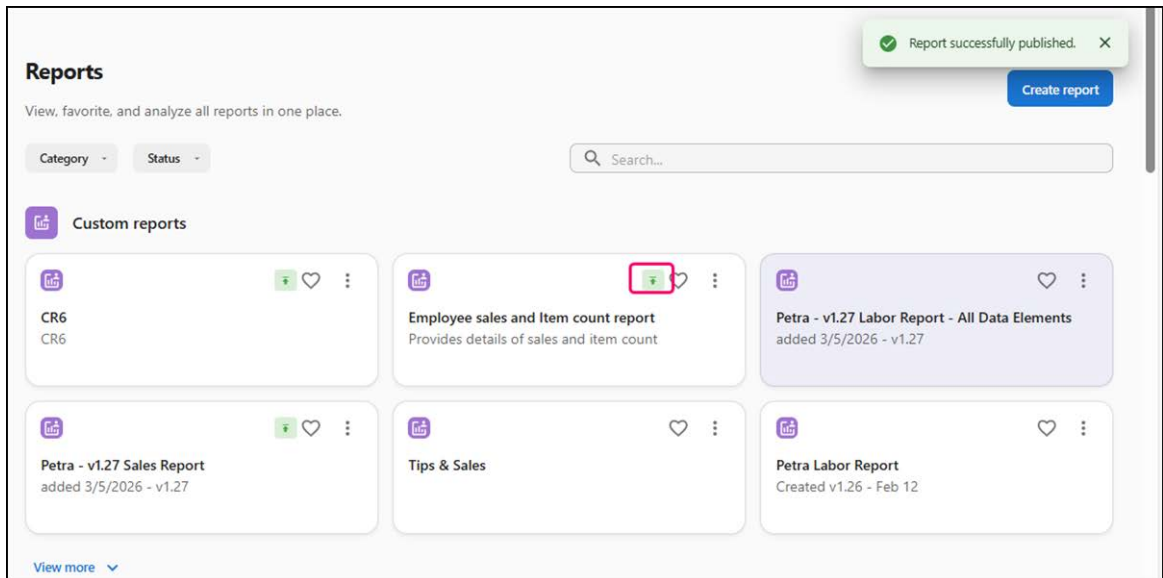


Figure 16 Publish icon

The publish icon appears in the right corner of the report to indicate that the report is published.

Managing published users

You can manage a published report by updating the published users and roles who have access to it. You can add or remove users and roles as needed, or unpublish the report based on your business requirements.

To manage published users:

1. Select the **Reports** menu. The 'Reports' screen appears.
2. Click the **three dots** in the top-right corner of the report to manage its users.

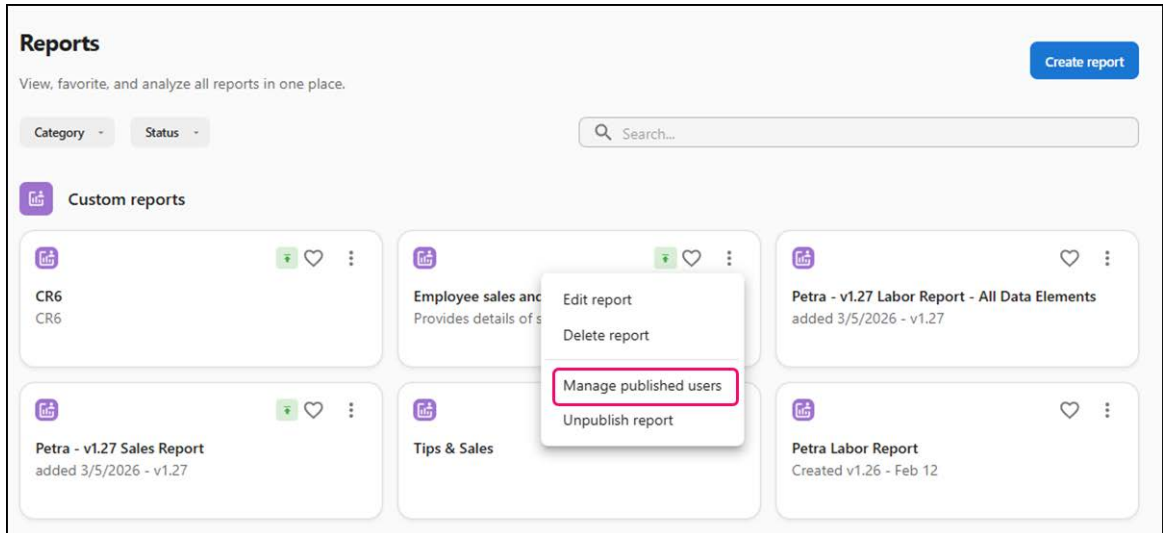


Figure 17 Manage published users

3. Click **Manage published users**. The select data pop-up window opens and shows the individuals and user roles you can edit or manage for the report.

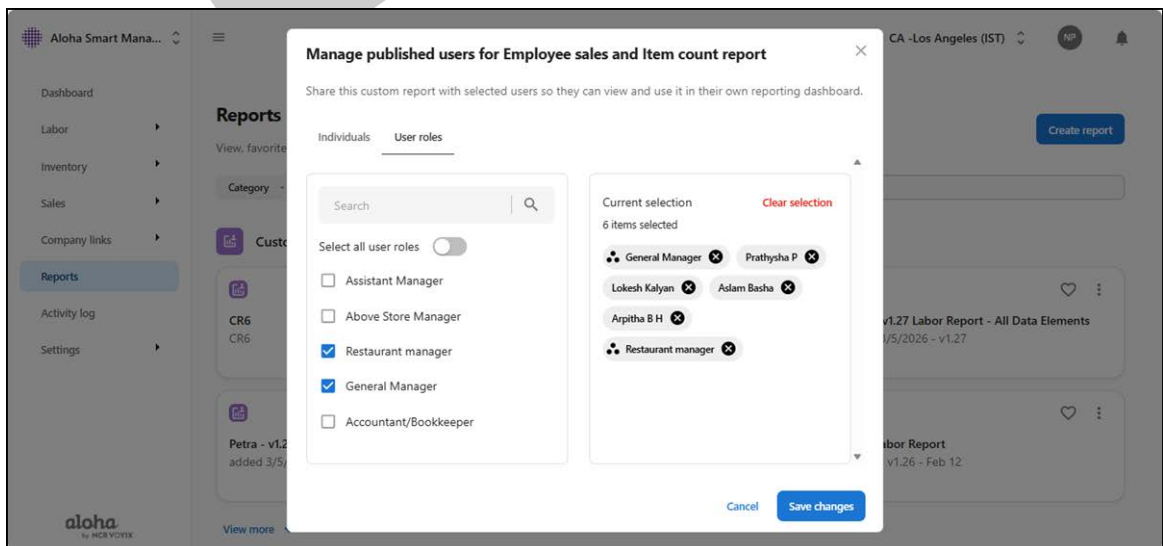


Figure 18 Manage users for published report

4. Click **Save changes**. A success message appears and automatically dismisses.

To unpublish a report:

1. Select the **Reports** menu. The 'Reports' screen appears.
2. Click the **three dots** in the top-right corner of the report you want to unpublish.

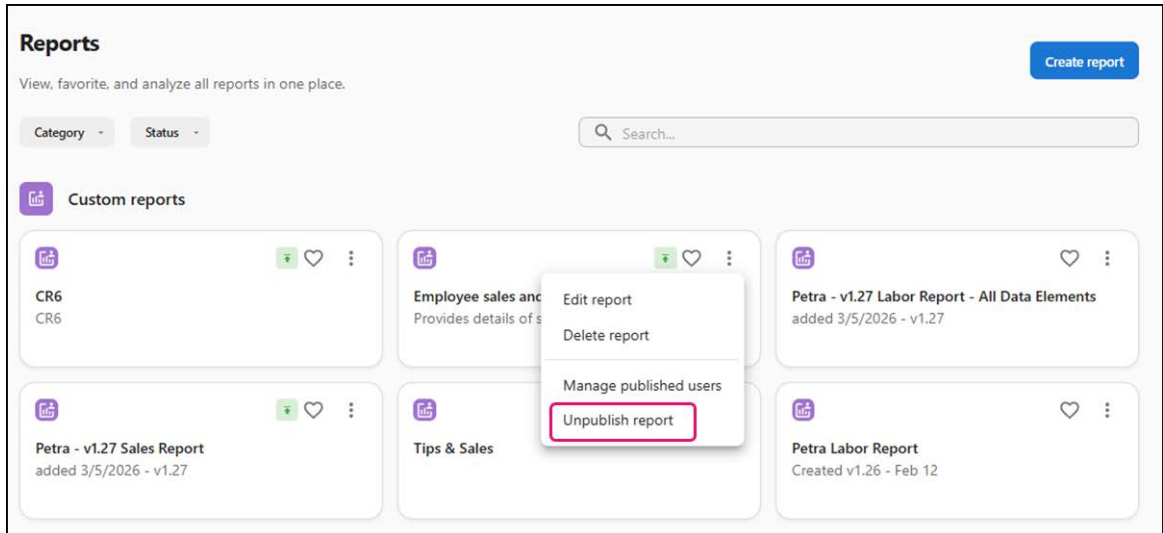
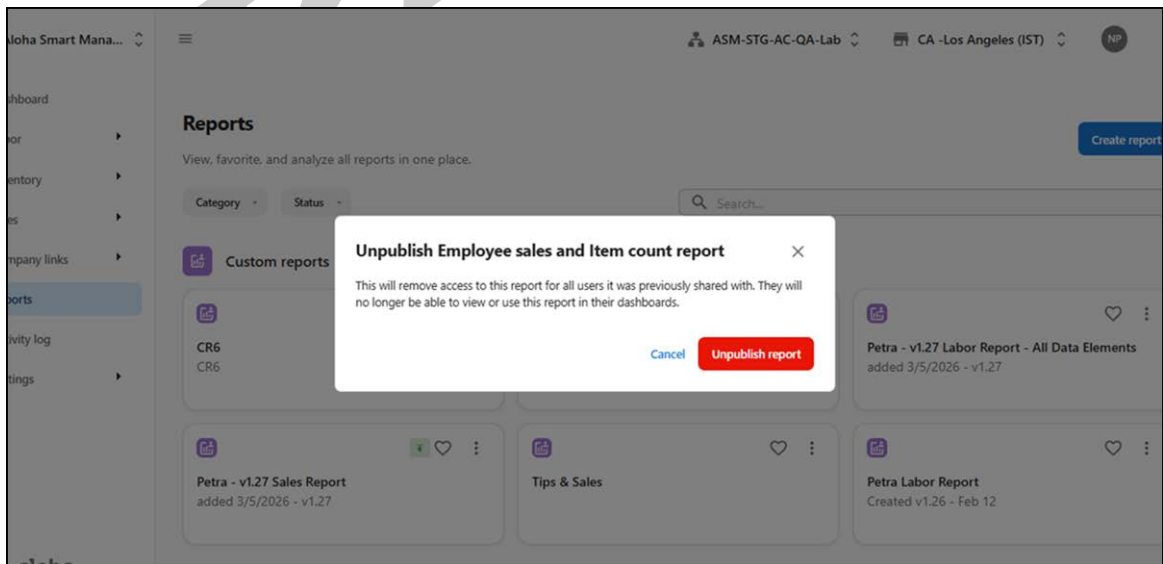


Figure 19 Unpublish report

3. Click **Unpublish report**. A confirmation message to unpublish the report appears.

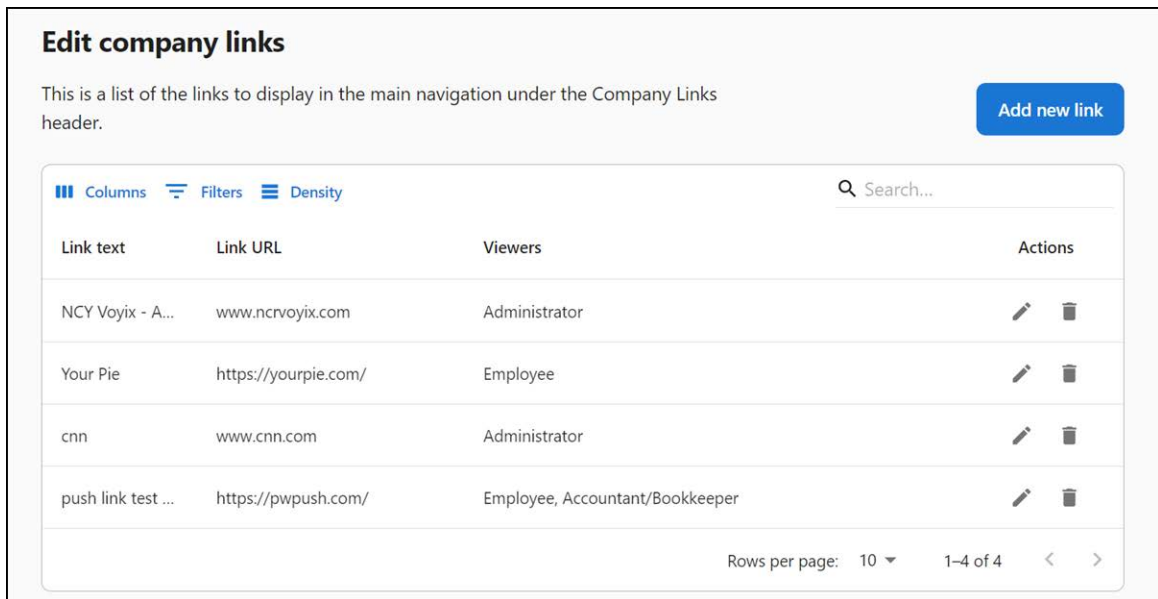


Confirmation message

4. Click **Unpublish report** to confirm. A success message appears and automatically dismisses.









Managing company links

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



Edit company links

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

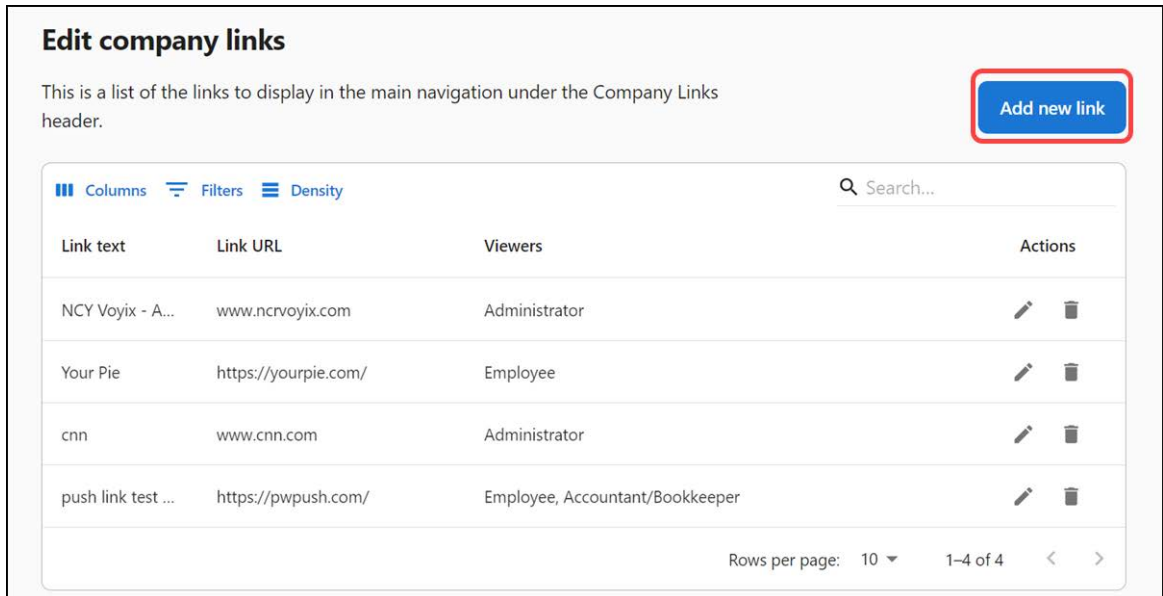
Link text	Link URL	Viewers	Actions
NCY Voyix - A...	www.ncrvoyix.com	Administrator	 
Your Pie	https://yourpie.com/	Employee	 
cnn	www.cnn.com	Administrator	 
push link test ...	https://pwpush.com/	Employee, Accountant/Bookkeeper	 

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

'Edit company links' screen

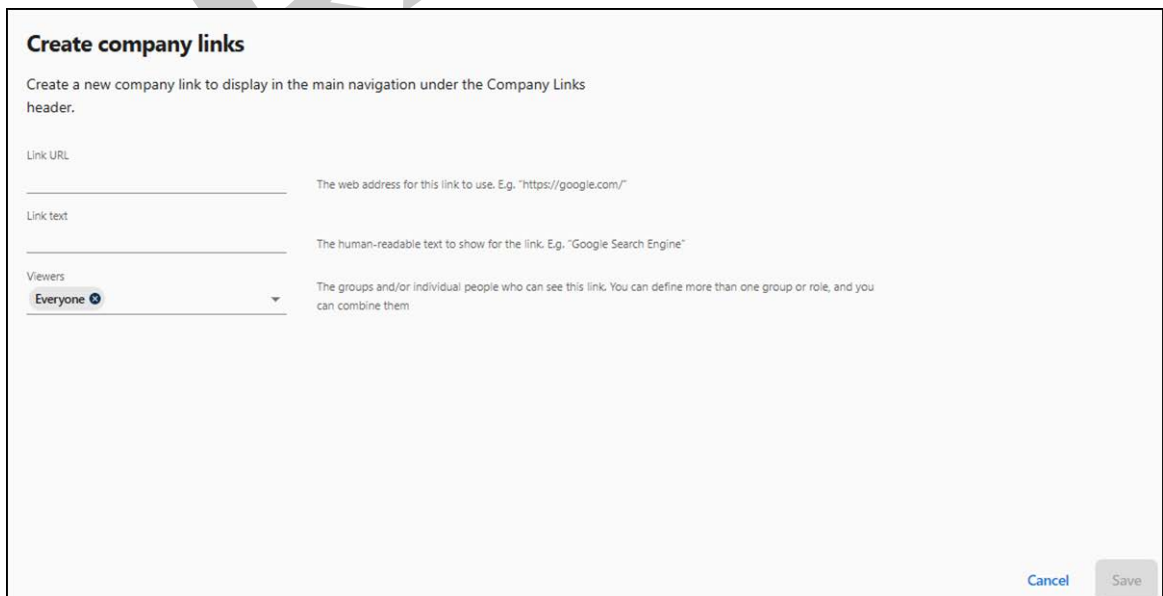
To create a company link:

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



'Edit company links' screen

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



'Create company links' screen

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

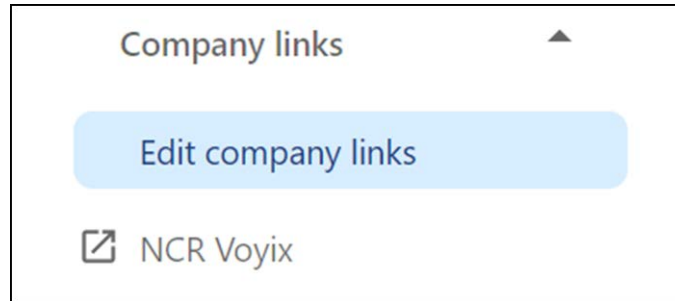
Edit company links

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

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

List of company links

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



New company link

You can **Edit** or **Delete** the company link using the **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

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

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

Columns Filters Density Search...

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

Activity Log landing page

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

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

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

Origin — Module impacted due to the activity.

User — Employee who performed the activity.

Sites — Site at which the activity occurred.

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

Entity — Business entity impacted.

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

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

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

Priority — Severity of the corresponding activity.

Origin — Actual module that was impacted.

User — Name of the employee who performed the activity.

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

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

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

Message — Additional information about the activity.

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

Audit logging ID — Unique audit log ID.

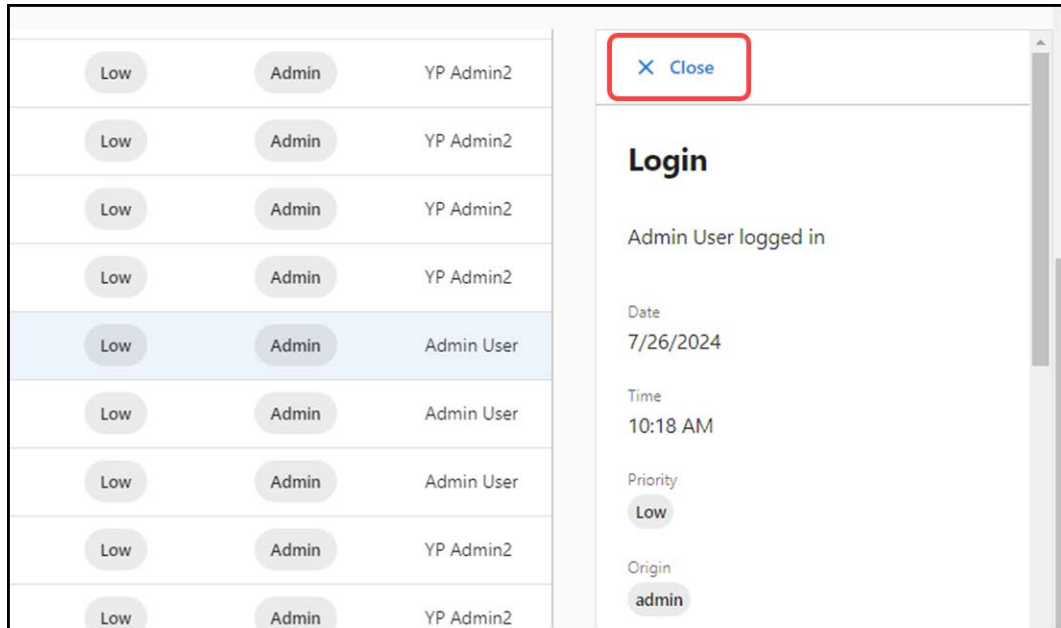
Pub Sub Message ID — Unique pub-sub message ID.

Payload — Actual payload message.

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

Activity Log side panel

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



Activity Log side panel - Close button

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About Settings

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

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

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

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

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

DRAFT

Working with 'Organization settings'

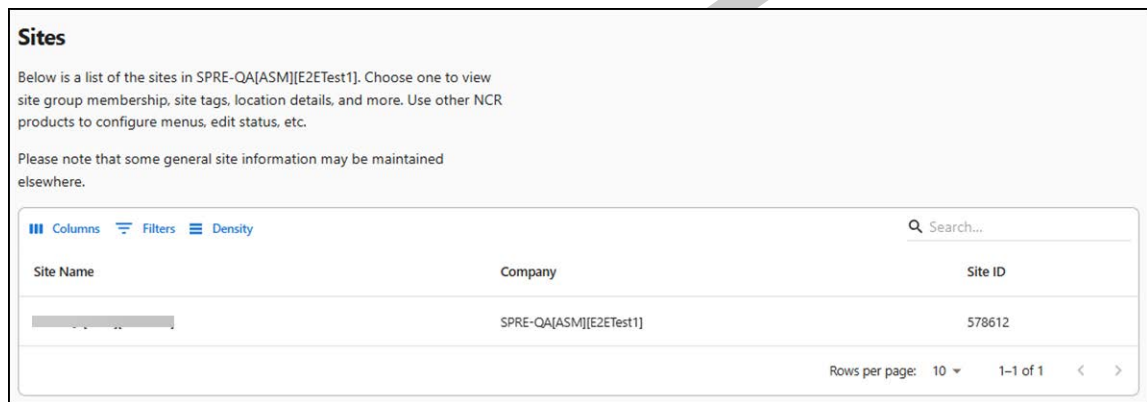
Use 'Organization settings' to view location details for sites to which you are assigned and to establish your fiscal calendar.

Viewing site information

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

To view the sites to which you have access:

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



Sites

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

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

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

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

'Sites' screen

The following columns appear on this screen:

Site Name — The site to which you have access.

Company — The company to which the corresponding site is associated.

Site ID — The unique ID of the site.

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

Configuring the fiscal calendar

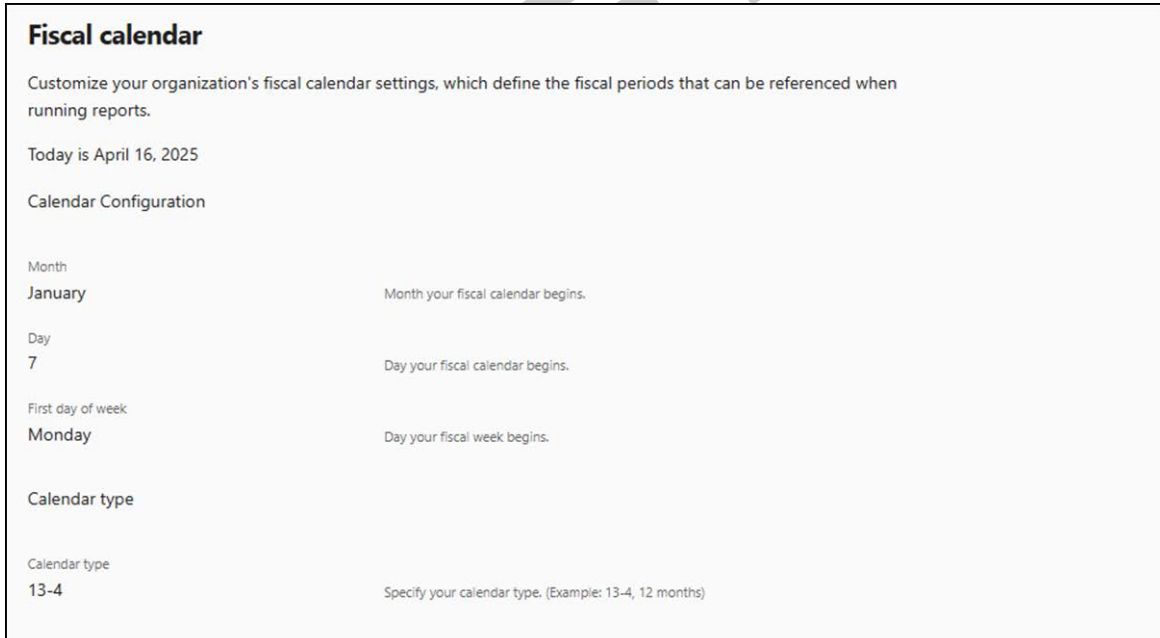
A fiscal calendar is a 12-month accounting period that an organization uses to manage their financial reporting and accounting activities. The calendar helps you track important financial events, such as the end of a quarter or end of fiscal year, and plan for financial reporting and tax obligations.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

Important

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

To configure the fiscal calendar:

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



The screenshot shows the 'Fiscal calendar' configuration page. At the top, it says 'Fiscal calendar' and 'Customize your organization's fiscal calendar settings, which define the fiscal periods that can be referenced when running reports.' Below this, it displays 'Today is April 16, 2025' and a 'Calendar Configuration' section. The configuration includes: 'Month' set to 'January' (with a note 'Month your fiscal calendar begins.'), 'Day' set to '7' (with a note 'Day your fiscal calendar begins.'), 'First day of week' set to 'Monday' (with a note 'Day your fiscal week begins.'), and 'Calendar type' set to '13-4' (with a note 'Specify your calendar type. (Example: 13-4, 12 months)').

Fiscal calendar configuration

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

Month — Month your fiscal calendar begins.

Day — Day your fiscal calendar begins.

First day of the week — Day your fiscal week begins

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

3. Select the day of the week on which the fiscal week begins.
4. Under the 'Calendar type' group bar, select the **calendar type** to denote the type of fiscal calendar to use. The available choices are:

13-4 — Indicates a year-long calendar comprised of 13 periods of four weeks each.

12 Months — Indicates a year-long calendar of 12 periods, roughly corresponding to months.

Required Options: This option enables the 'Select quarter style' option where you define the reporting pattern for each 'month' in the quarter.

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

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

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

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

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

Calendar type

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

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

Preview

< 2024 > (52 Weeks)

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

Discard changes Save

Fiscal calendar type

6. Click **Save**.

Working with 'Site settings'

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

Viewing Site Settings

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

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

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

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

Address
Alexander Road, Alpharetta, GA, 32606

Company Name
28544774450447ab9975ce19587fd87e

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

Contact Email
-

Status
Active

Payroll Calendar
Every other week

Time Zone
America/New_York

'Site Settings' screen

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

Field name	Description
Site name	Unique name of the site. This name is used to represent your site at all occurrences.
Site ID	Unique ID of the site. This ID is used to represent your site at all occurrences.
Address	Full address of the selected site.
Company Name	Name of the company with which the selected site is associated.
Primary Contact	Name of the person for primary point of contact associated with the site.
Contact Email	Contact email of the primary person.
Status	Status of the site: Active or Inactive.
Payroll Calendar	Payroll calendar used for the selected site.
Time Zone	Time zone to which the selected site is mapped.

DRAFT

Configuring the payroll calendar for a site

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

Important

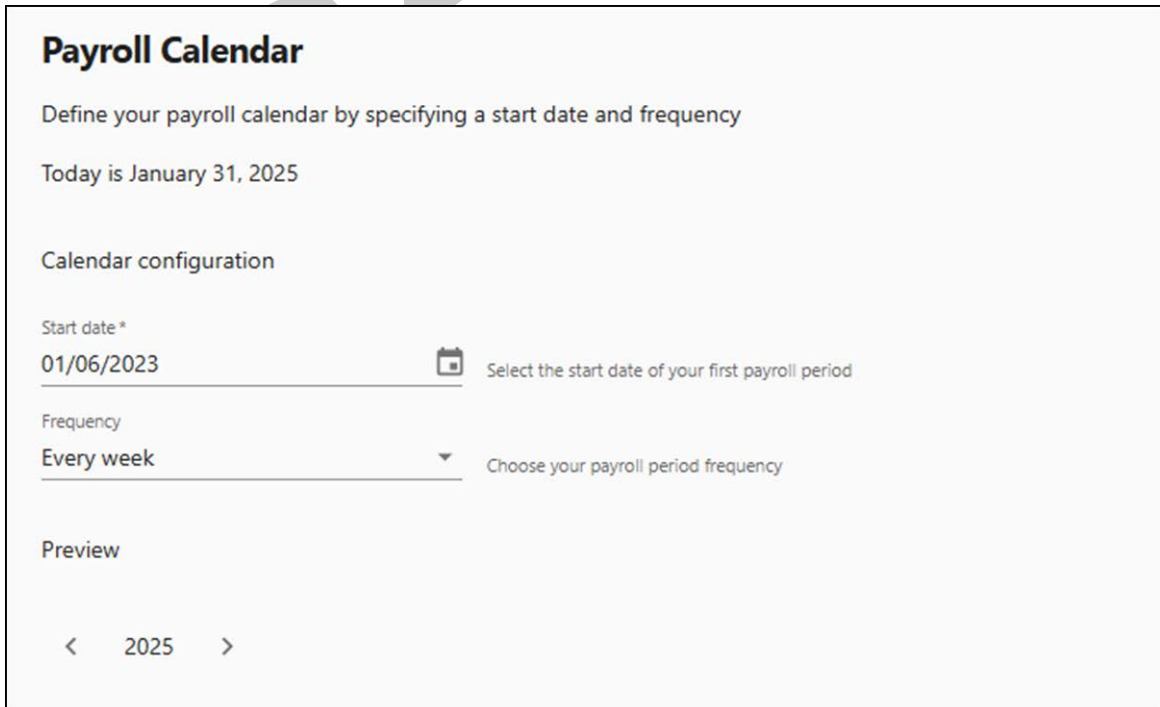
You must be an Admin to edit the settings available in the 'Payroll calendar' function; otherwise, the information is read only.

To configure the payroll calendar:

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

Every other week — Used for bi-weekly payrolls.

Every week — Used for weekly payrolls.





Payroll Calendar

Define your payroll calendar by specifying a start date and frequency

Today is January 31, 2025

Calendar configuration

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

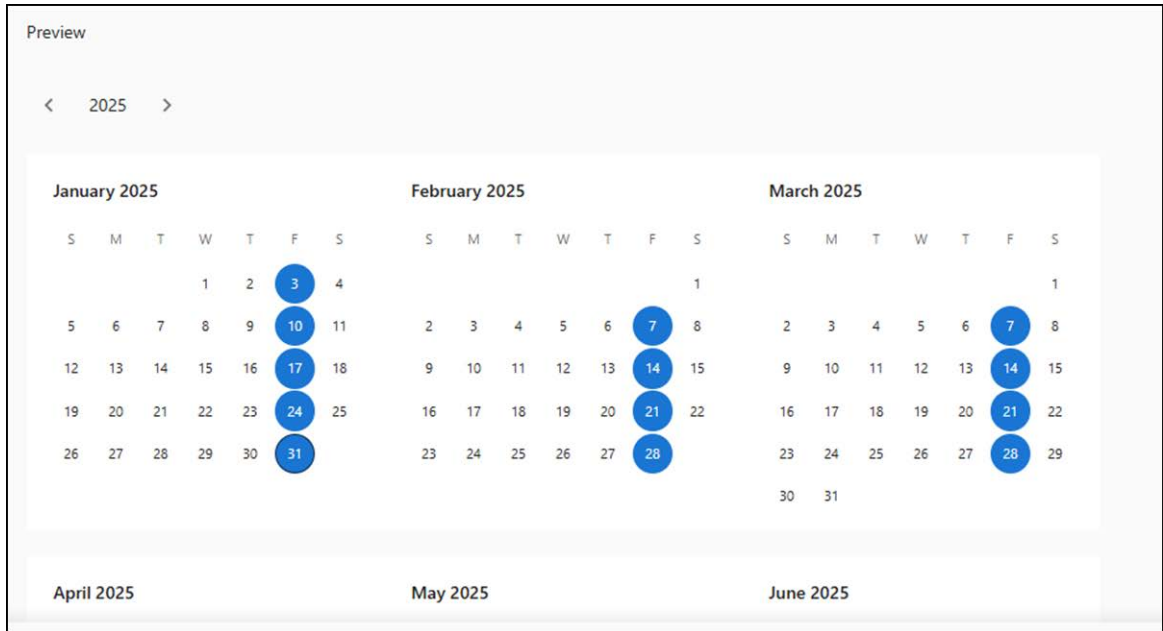
Frequency
Every week  Choose your payroll period frequency

Preview

< 2025 >

Payroll Calendar options

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



Payroll Calendar preview

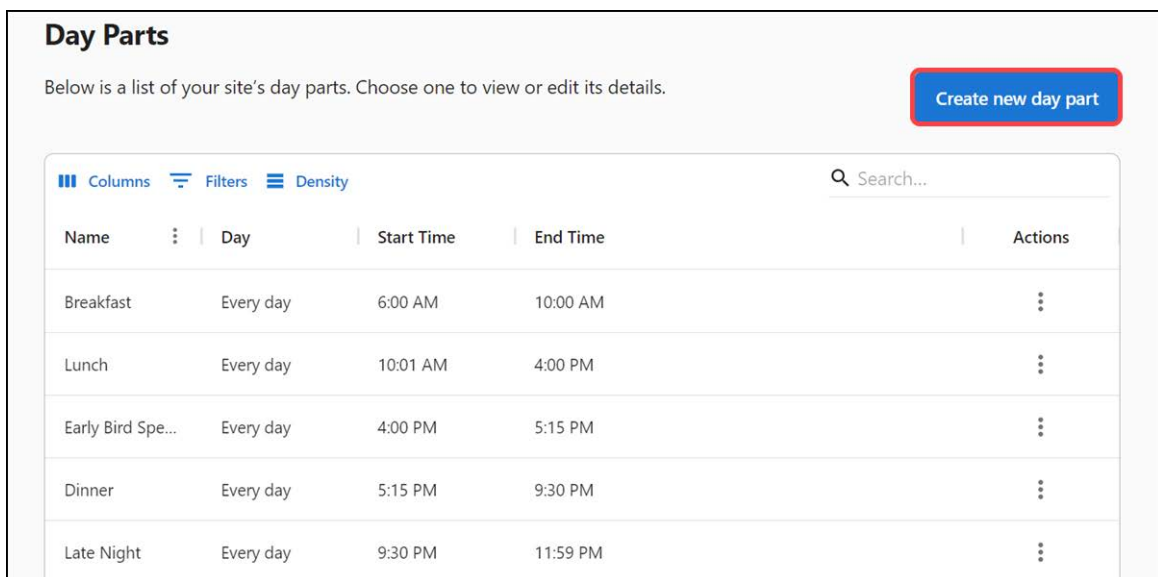
4. Click **Save**.

Configuring a day part

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

To configure a day part:

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



Creating a day part

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

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

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

Day part

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

To edit a day part:

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

To delete a day part:

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

Working with 'Labor settings'

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

Setting the Workday and Workweek

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

To set the workweek/workday for a schedule:

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

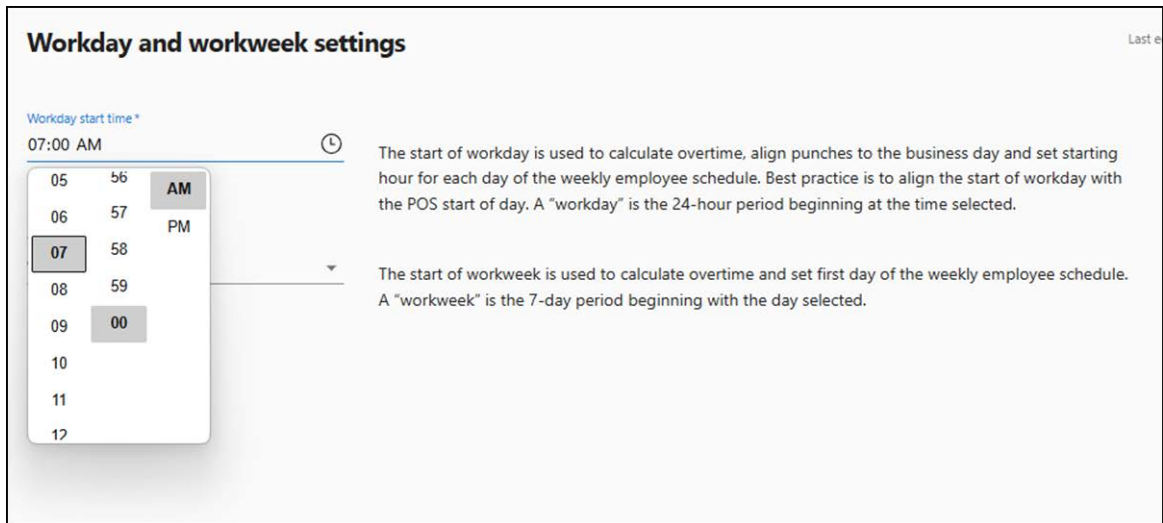
Workday and workweek settings Last edit was 5/15/2025 by default

Workday start time *
03:00 AM 🕒 The start of workday is used to calculate overtime, align punches to the business day and set starting hour for each day of the weekly employee schedule. Best practice is to align the start of workday with the POS start of day. A "workday" is the 24-hour period beginning at the time selected.

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

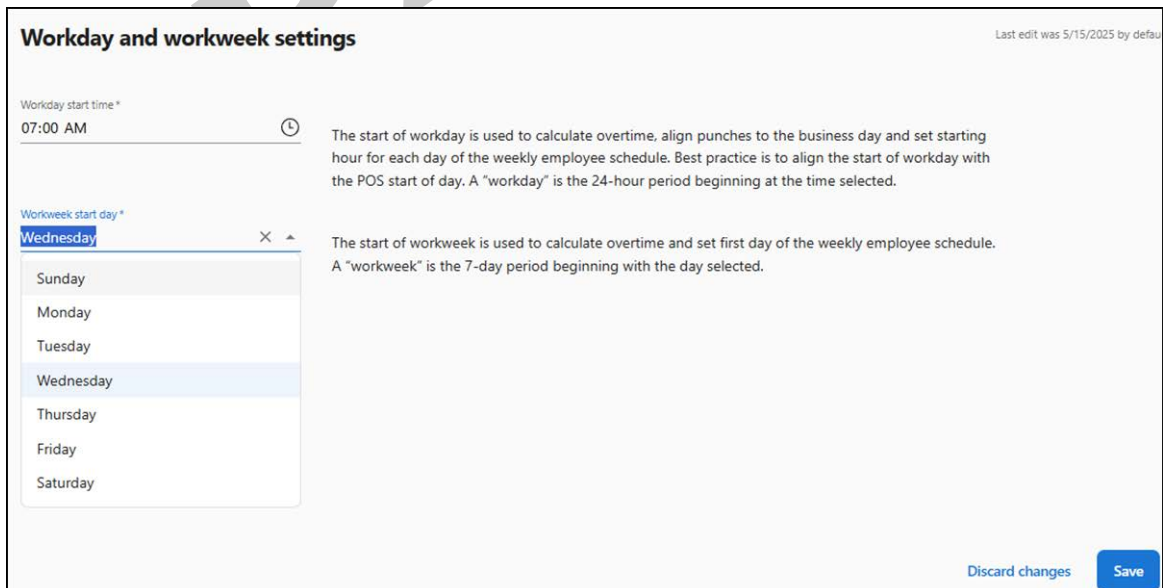
Workday and Workweek settings

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



Workday settings

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

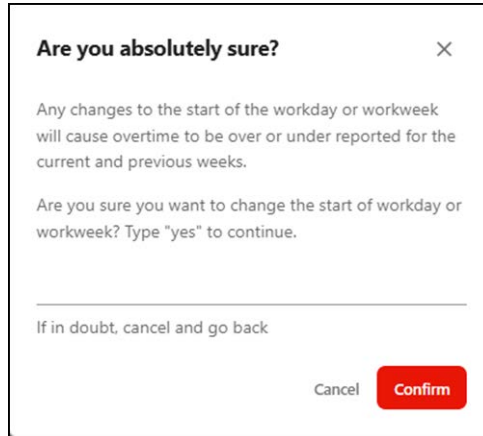


Workweek settings

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.

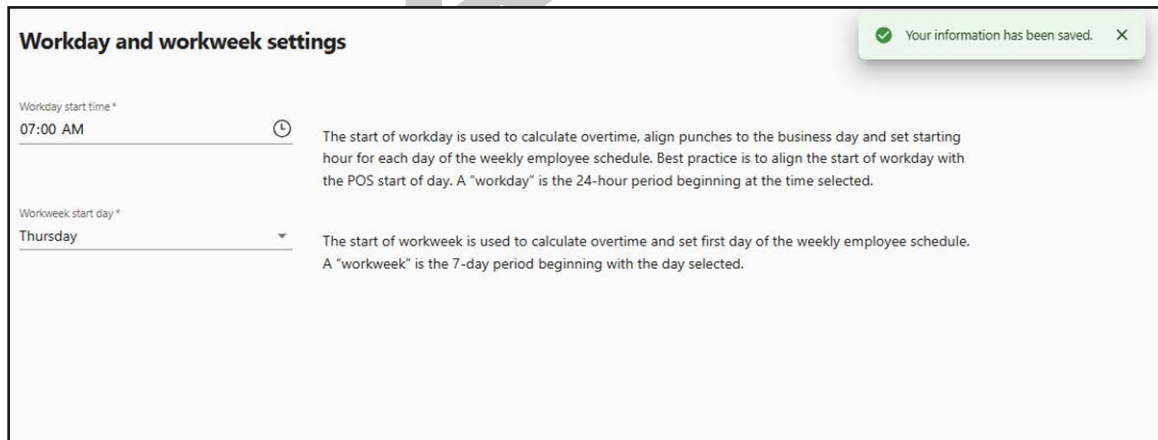
6. Click **Save**.



Confirmation window

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

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.

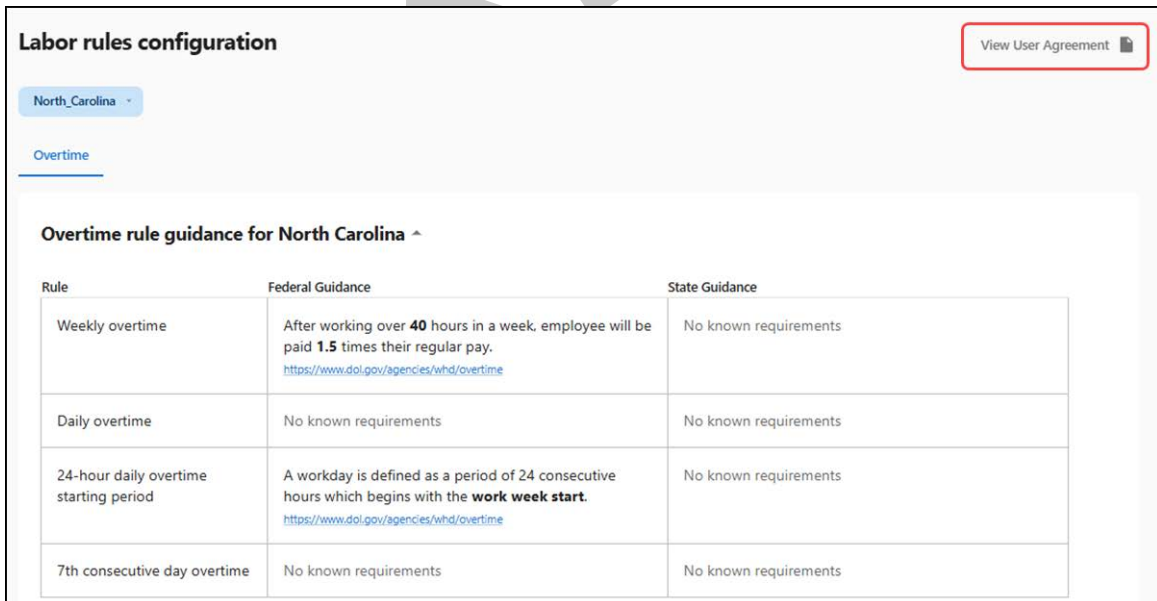
Important

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 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.



The screenshot shows the 'Labor rules configuration' interface. At the top right, there is a 'View User Agreement' button. Below the header, a dropdown menu shows 'North_Carolina' and a sub-section 'Overtime' is selected. The main content area is titled 'Overtime rule guidance for North Carolina' and contains a table with three columns: 'Rule', 'Federal Guidance', and 'State Guidance'.

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

View user agreement

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

Labor Rules User Agreement

Last revised: 07/31/2024

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

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

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

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

Full Name*

Date of acceptance* 06/04/2025

Done

View user agreement

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

Viewing your labor rules

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

The screenshot shows the 'Labor rules configuration' interface for North Carolina. It features a 'View User Agreement' link in the top right. Below the state selection, the 'Overtime' tab is active. The main content area is titled 'Overtime rule guidance for North Carolina' and contains a table with the following data:

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

Labor rules

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

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.

The screenshot shows the configuration for a labor rule named "Weekly overtime". It includes a checkbox that is checked, a text box with the rule description, and a table of sites in this jurisdiction.

Custom configuration, effective 06/04/2025

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

Sites in this jurisdiction

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

Rows per page: 5 1-1 of 1

Edit labor rule

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

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

LABOR RULES / EDIT LABOR RULE

Edit labor rule

Jurisdiction
Georgia

Weekly overtime

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

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

[Schedule new rule configuration](#)

Affected sites

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

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

Rows per page: 5 1-1 of 1

Excluded sites

All excluded sites will keep their current configuration

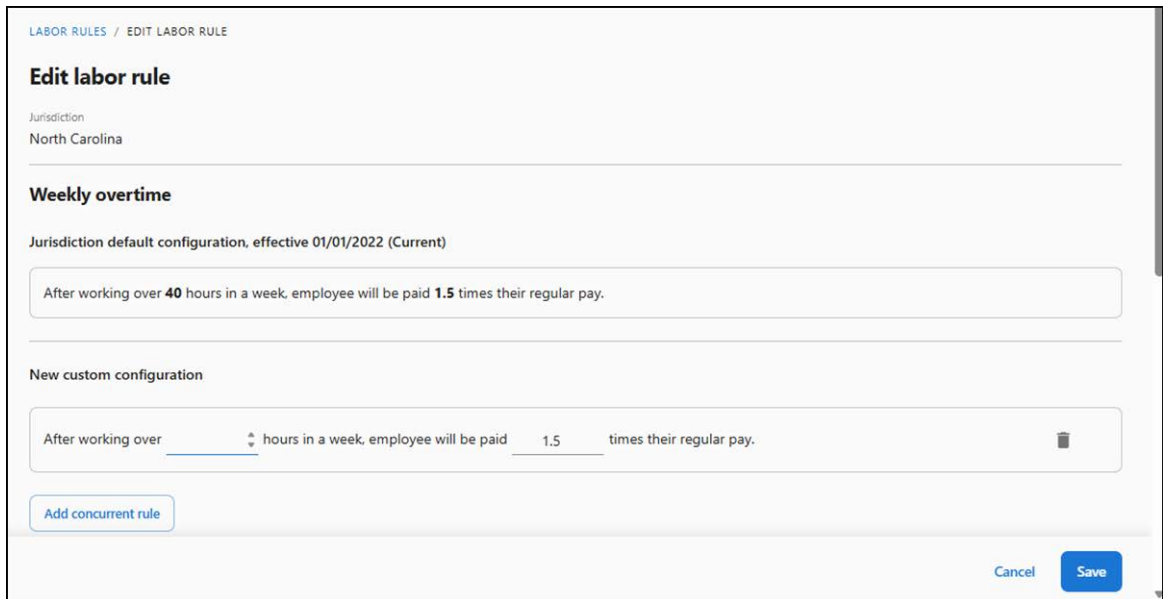
State	Site name	Site ID	Configuration
No rows			

Rows per page: 5 0-0 of 0

Cancel Save

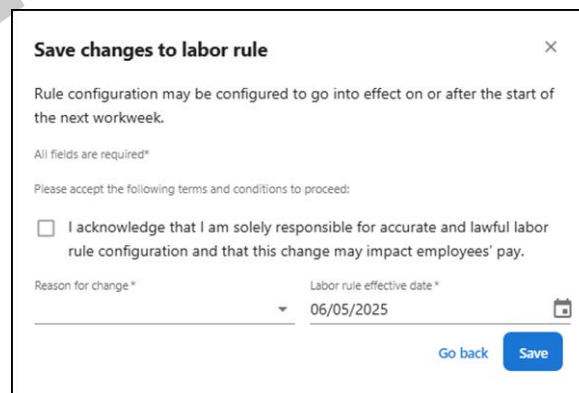
Schedule new rule configuration

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



'Edit labor rule' screen

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



Acknowledge labor rules

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

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

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

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

Confirmation message

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

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

Updated details in tabular format

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

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

LABOR RULES / EDIT LABOR RULE

Edit labor rule

Jurisdiction
North Carolina

Weekly overtime Restore default

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

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

[+ Schedule new rule configuration](#)

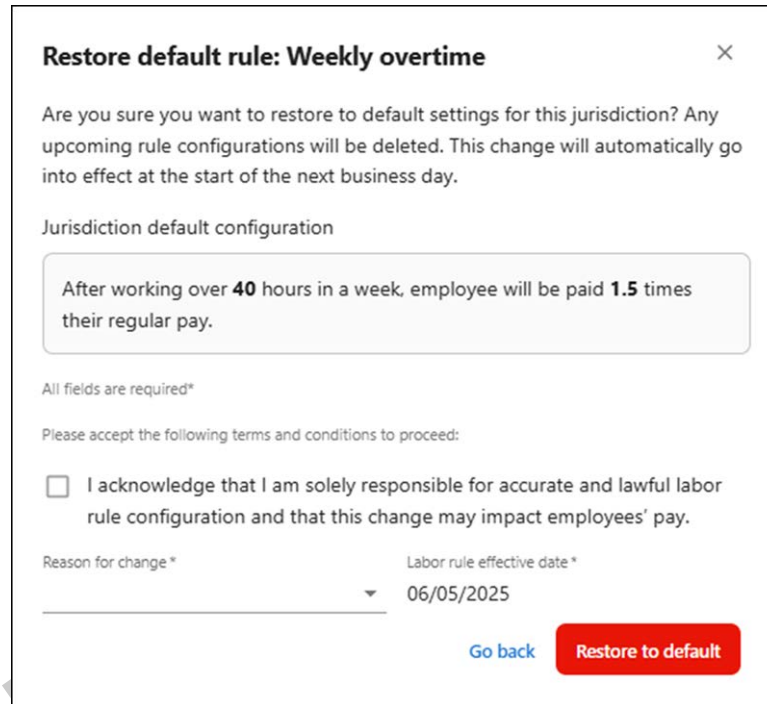
Restore default

DRAFT

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

 **Note**

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



Restore default rule: Weekly overtime ×

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

Jurisdiction default configuration

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

All fields are required*

Please accept the following terms and conditions to proceed:

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

Reason for change * Labor rule effective date *

06/05/2025

[Go back](#) Restore to default

Acknowledge restore default

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

Editing labor rules for Tips & Wages

Employers must pay the highest minimum wage set by federal, state, or local laws. Some jurisdictions allow you to use a tip credit to pay tipped employees a lower wage if tips make up the difference. If not, they must cover the shortfall. You can adjust tips and wages to remain compliant with the law.

Tip credits allow employers to count a portion of an employee's earned tips toward meeting minimum wage requirements. This means the employer pays less in direct wages, as tips contribute to the total

compensation. Tip credits are not wage deductions but a method of calculating wages that includes tips.

1. Select **Settings > Labor settings > Labor rules**.

The screenshot shows the 'Labor rules configuration' page for Georgia. The 'Tips & Wages' tab is selected. Below the tab, there is a section titled 'Tips & Wages rule guidance for Georgia' which contains a table with three columns: Rule, Federal Guidance, and State Guidance.

Rule	Federal Guidance	State Guidance
Minimum wage	Minimum wage is \$7.25 per hour. In cases where an employee is subject to both jurisdiction and federal minimum wage laws, the employee is entitled to the higher minimum wage. https://www.dol.gov/agencies/whd/lsa	No known requirements
Tipped minimum wage & tip credit calculation	Tip credit permitted. Minimum cash wage is \$2.13 per hour. https://www.dol.gov/agencies/whd/state/minimum-wage/tipped	No known requirements

Source: United States Department of Labor. Last retrieved 01/01/2025. Disclaimer: Information in this section is provided for convenience, but employers are solely responsible for accurate and lawful labor rule configuration. Please reference your local labor laws to ensure all labor rules are accurate and up to date.

Labor rules

2. Click **Tip & Wages** tab to edit the labor rule.

The screenshot shows the 'Labor rules configuration' page for North Carolina. The 'Tips & Wages' tab is selected. The 'Minimum wage' rule is highlighted, and an 'Edit labor rule' button is visible. Below the rule name, there is a text input field containing 'Minimum wage is \$7.25 per hour.' and a table listing sites in this jurisdiction.

Site name	Site ID	Configuration	Effective date	Effective Until	Reason for change	Action
QE Staging Accepta...	1	Federal	2025-01-01			

Labor rule - Minimum wage

3. Click **Edit labor rule**. The 'Edit labor rule' screen appears for minimum wage.

LABOR RULES / EDIT LABOR RULE

Edit labor rule

Jurisdiction
North Carolina

Minimum wage

Jurisdiction default configuration, effective 01/01/2025 (Current)

Minimum wage is **\$7.25** per hour.

[+ Schedule new rule configuration](#)

Affected sites

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

State	Site name	Site ID	Configuration
North Carolina	QE Staging Acceptance Site	1	Federal

Rows per page: 5 1-1 of 1

Excluded sites

All excluded sites will keep their current configuration

State	Site name	Site ID	Configuration
No rows			

Cancel Save

Schedule new rule configuration

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

LABOR RULES / EDIT LABOR RULE

Edit labor rule

Jurisdiction
North Carolina

Minimum wage

Jurisdiction default configuration, effective 01/01/2025 (Current)

Minimum wage is **\$7.25** per hour.

New custom configuration

Minimum wage is \$ 7.25 per hour.

Affected sites

Cancel Save

'Edit labor rule' screen

- Edit the **labor rule**, as needed. You can view the affected and excluded sites receiving the change in the displayed sections.
- Click **Save** to save the changes. A confirmation screen appears.

Save changes to labor rule

Rule configuration may be configured to go into effect on or after the start of the next workweek.

All fields are required*

Please accept the following terms and conditions to proceed:

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

Reason for change* Labor rule effective date*

06/05/2025

Go back Save

Acknowledge labor rules

7. Choose a **reason for the change** to the labor rule.
8. 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. A confirmation message appears on the screen with the updated changes.

Labor rules configuration

North Carolina

Overtime Tips & Wages

Rule	Federal Guidance	State Guidance
Minimum wage	Minimum wage is \$7.25 per hour. In cases where an employee is subject to both jurisdiction and federal minimum wage laws, the employee is entitled to the higher minimum wage. https://www.dol.gov/agencies/whd/fisa	No known requirements
Tipped minimum wage & tip credit calculation	Tip credit permitted. Minimum cash wage is \$2.13 per hour. https://www.dol.gov/agencies/whd/state/minimum-wage/tipped	No known requirements

Source: United States Department of Labor. Last retrieved 01/01/2025. Disclaimer: Information in this section is provided for convenience, but employers are solely responsible for accurate and lawful labor rule configuration. Please reference your local labor laws to ensure all labor rules are accurate and up to date.

Confirmation message

Configuring Jobs

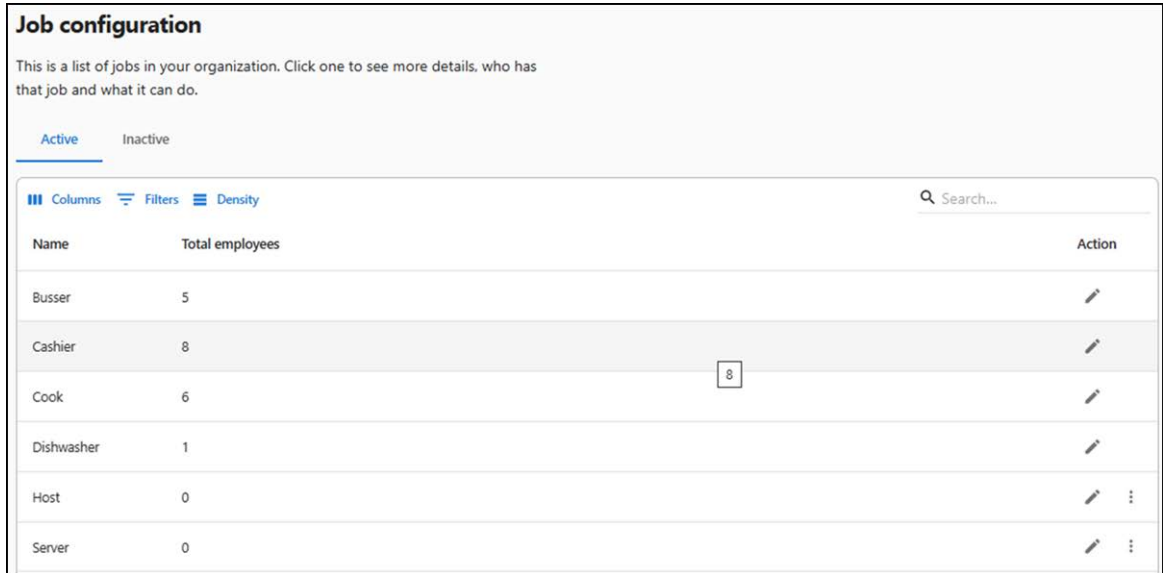
The 'Jobs' function provides a job description for the role an employee performs when they are clocked in. Jobs control whether an employee can enter orders, the parameters under which they can take breaks, whether they can operate a cash drawer, and more.

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

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

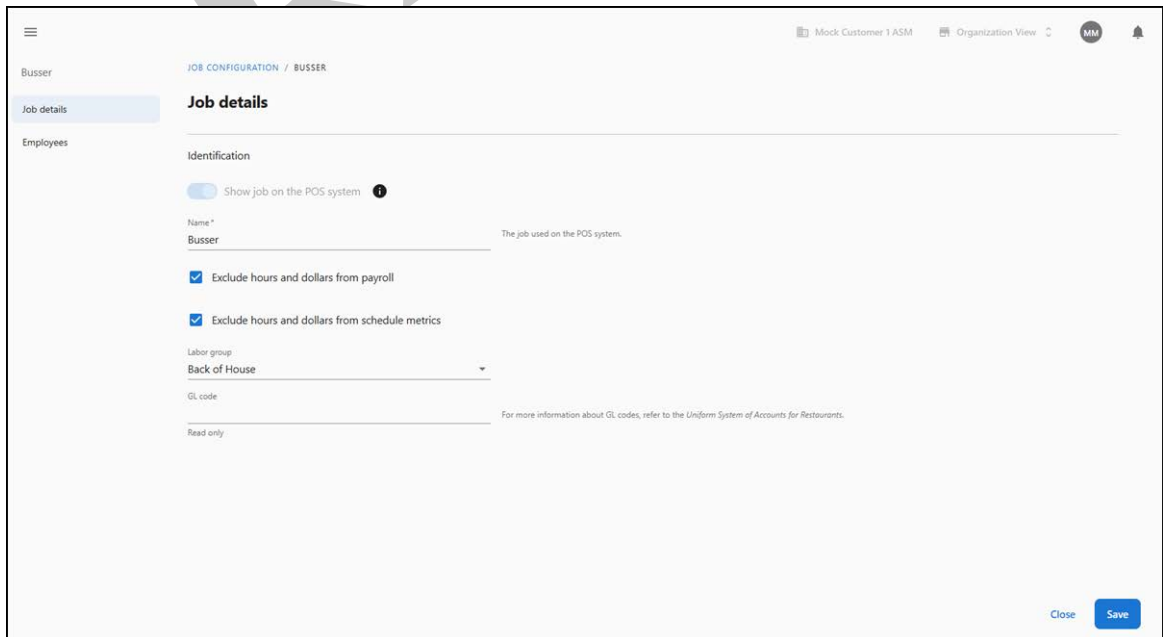
To modify job properties:

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



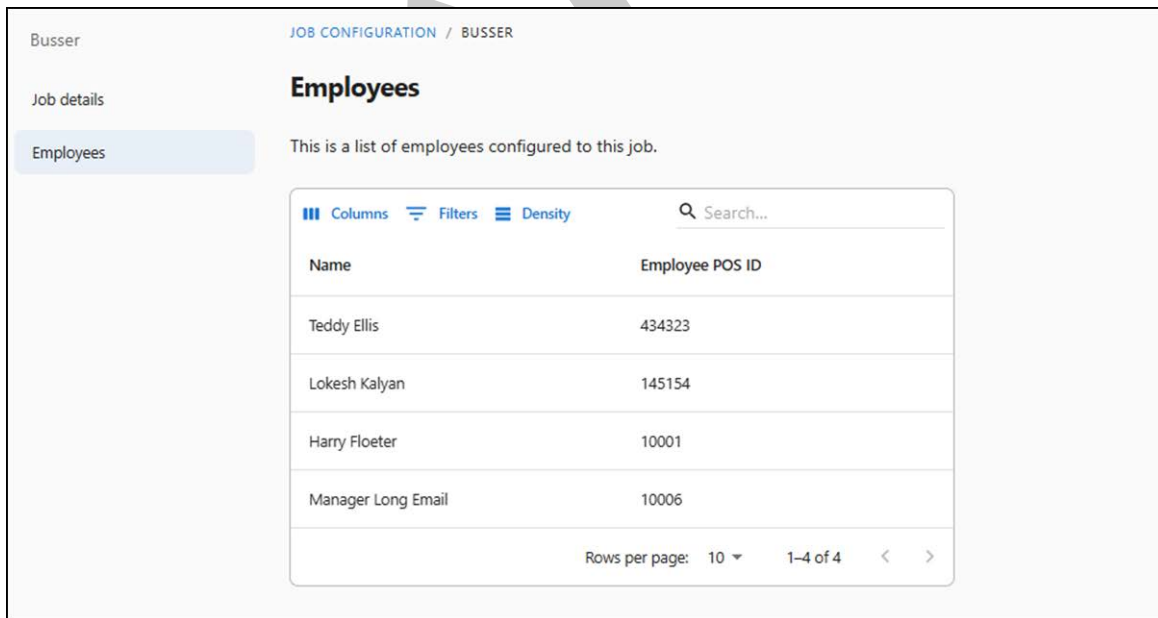
'Job configuration' screen

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



'Job details' screen

3. Select **Show job on the POS system** to make the job available for selection when logging in to the Front-of-House. The 'Show job on the POS system' option is available for selection only when no employees are assigned to the selected job. Toggle this option to the off position to hide it from selection when logging in to the POS.
4. Type a descriptive **name** to appear in the FOH to assist the employee in job selection.
5. Select **Exclude hours and dollars from payroll** to exclude the hours and dollar amounts worked and earned under the selected job code from the payroll report.
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. Specifies the unique general ledger code. For more information about GL codes, refer to "Managing your GL account" on page 257, and 'Uniform System of Accounts for Restaurants'. Currently not supported.
9. Click **Save**.
10. Select the **Employees** tab to view a list of employees currently assigned to the job.



Busser

JOB CONFIGURATION / BUSSER

Job details

Employees

This is a list of employees configured to this job.

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

Columns Filters Density Search...

Rows per page: 10 1-4 of 4

Employee jobs



Tip

When you select an employee in the list, ASM navigates you to the Employees function, allowing you to assign additional jobs to the employee. Refer to ["Step 3: Assigning a job to a new employee." on page 31](#) for more information.

Making a job inactive

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



Warning

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

To deactivate a job:

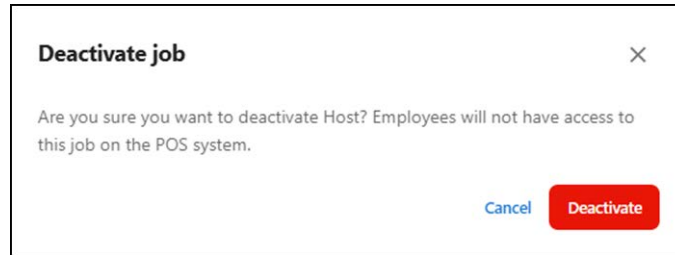
1. Select **Settings > Labor Settings > Job configuration**. The 'Job configuration' screen appears.

The screenshot shows the 'Job configuration' screen with the following data:

Name	Total employees	Action
Busser	5	[Edit]
Cashier	8	[Edit]
Cook	7	[Edit]
Dishwasher	2	[Edit]
Host	0	[Edit] [More]
Server	0	[Edit] [More]
FOH Team Member	0	[Edit] [More]
BOH Team Member	0	[Edit] [More]
BOH Trainer	0	[Edit] [More]
Manager	5	[Edit] [More] [Deactivate]

Deactivate a job

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



Confirm job deactivation

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

 **Tip**

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

To activate a job currently set as inactive:

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

The screenshot shows the "Job configuration" page. At the top, there's a title "Job configuration" and a subtitle "This is a list of jobs in your organization. Click one to see more details, who has that job and what it can do." Below this are two tabs: "Active" and "Inactive", with "Inactive" selected and highlighted with a red box. The main content is a table with columns for "Name", "Total employees", and "Action". The table lists several job roles: Busser (5 employees), Cashier (8), Cook (6), Dishwasher (1), Host (0), Server (0), and FOH Team Member (0). Each row has an edit icon (pencil) and a three-dot menu icon in the "Action" column. At the top of the table, there are options for "Columns", "Filters", and "Density", and a search bar on the right.

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.

DRAFT

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.

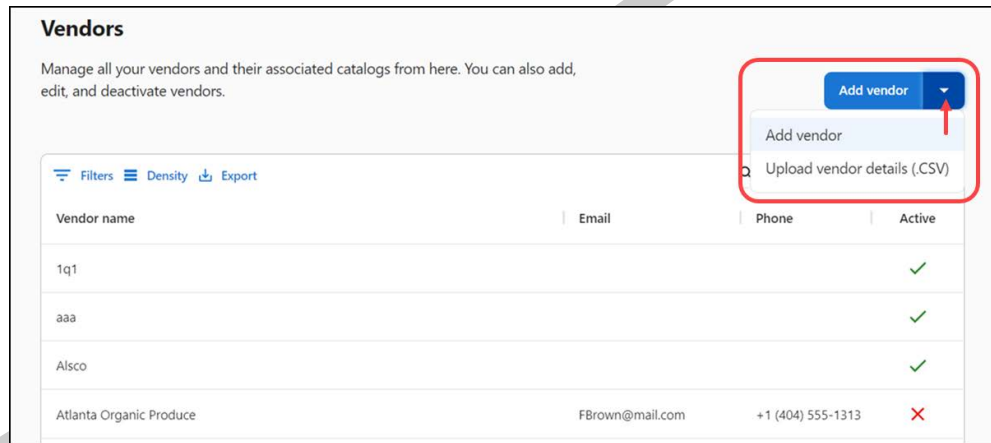
You will need the country.CSV, countrycode.CSV, and state.CSV as a reference for entering the data into vendors_data_import.CSV.

Column name	Description
Vendor name	The name of the vendor, up to 100 characters. This is a required field and it must be unique.
A/P Code	The accounts payable code, up to 50 characters.
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.
Address 1	The address of the vendor, up to 250 characters.
Address/Suite	The address/suite of the vendor, up to 250 characters.
City	The city where the vendor resides, up to 100 characters.
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.
Postal Code	The postal code of the vendor, up to 10 characters.
Contact Name	The contact name associated with the vendor, up to 100 characters.
Contact Title	The title of the contact associated with the vendor, up to 50 characters.
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 name	Description
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.
Email Address	The email address of the vendor, up to 100 characters.
Customer Account Number	The customer account number associated with the vendor, up to 250 characters.
Comments	Any comments related to the vendor, up to 1000 characters.

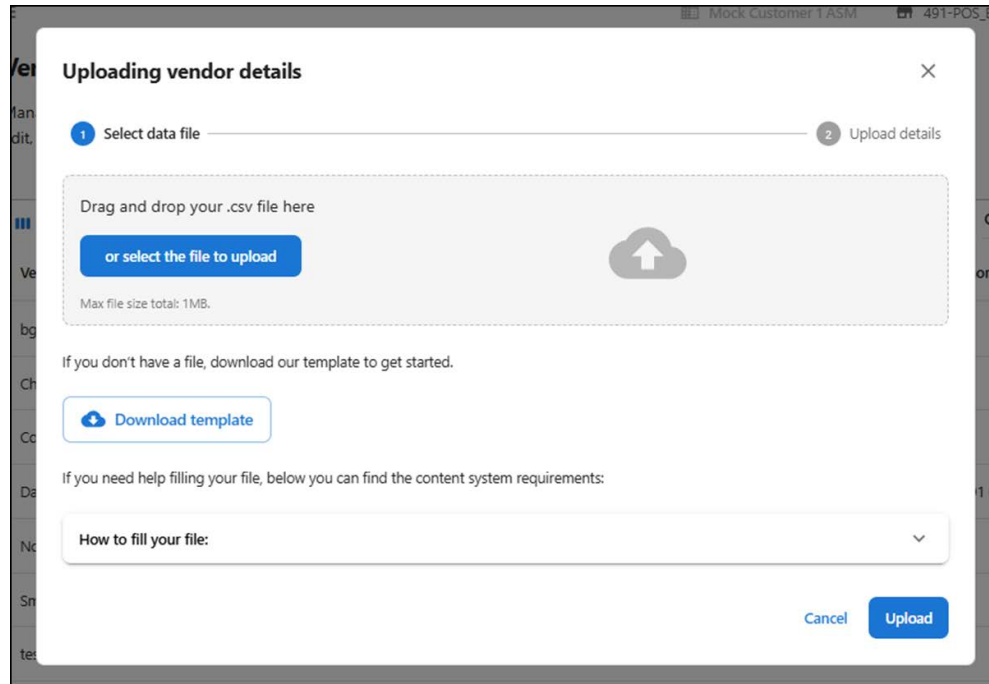
To upload vendors in bulk:

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



Add vendors in bulk

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



'Uploading vendor details' screen

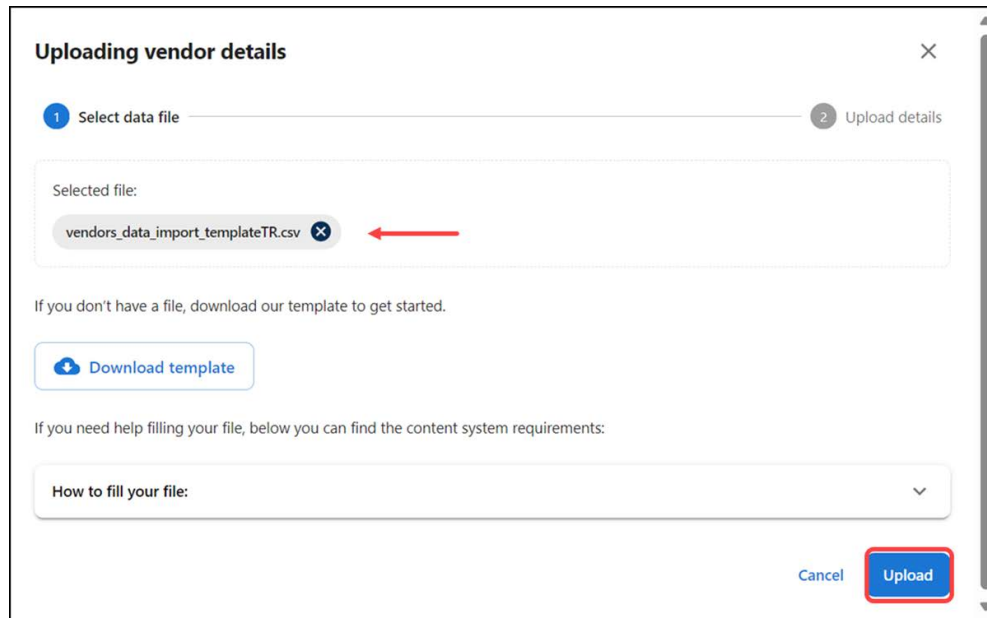
3. Click **Download template**. The file automatically downloads vendor_data_import.CSV.
4. Click the **How to fill your file** drop-down to expose instructions for completing the spreadsheet.
5. Type or copy and paste the **vendor information** into vendor_data_import.CSV..

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

Adding vendor information in bulk

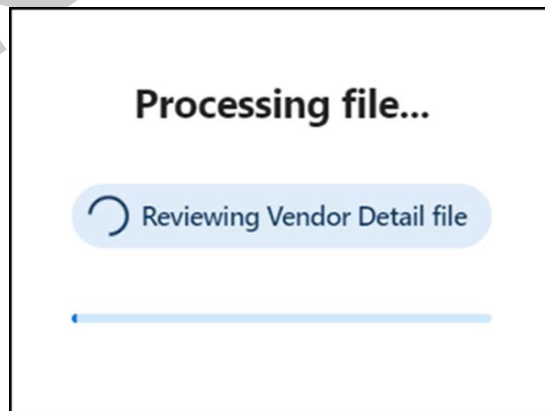
6. Return to the **Uploading vendor details** screen and upload the **.CSV file** by performing **one** of the following:
 - a. Drag and drop **vendor_data_import.CSV** into the appropriate area.-OR-

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



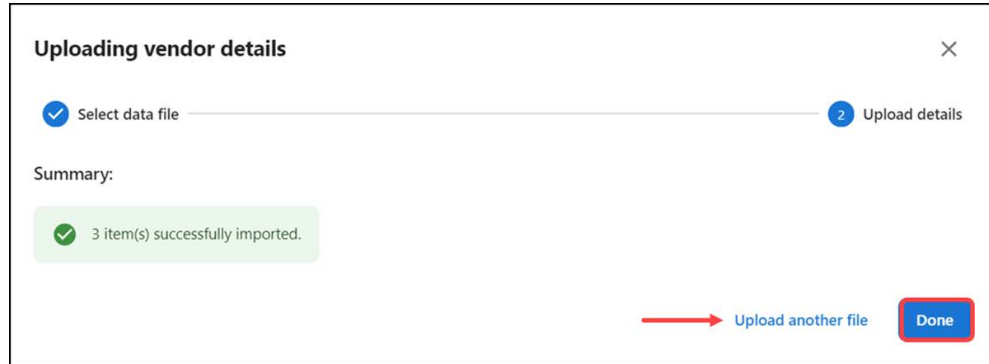
Selecting vendors file list

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



'Processing file' status screen

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



'Uploading vendor details' screen with summary

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

Uploading vendor items in bulk

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

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

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

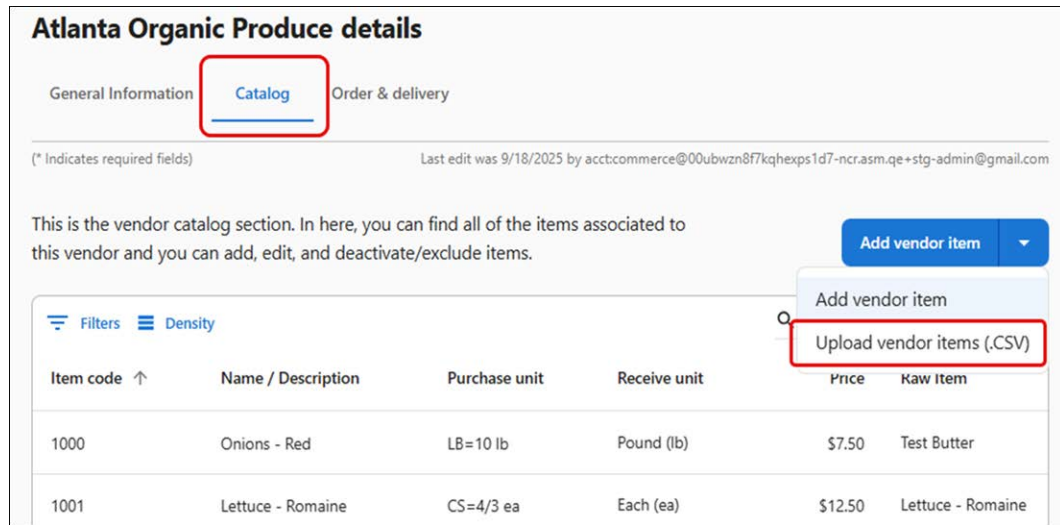
Column name	Description
Item code	The vendor item identifying number, up to 50 characters. You can leave this blank as long as name/description, container, pack, size, and unit combination are unique.
Name/Description	The description of the vendor item, up to 250 characters. This is a required field.
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.
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 name	Description
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.
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.
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.
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.
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.
Raw item	The name of the raw item associated with the vendor item, up to 250 characters.
Category	The category ID associated with the raw item. Click 'Download category options list' for the list of categories defined in Aloha Smart Manager.

To upload vendor items in bulk:

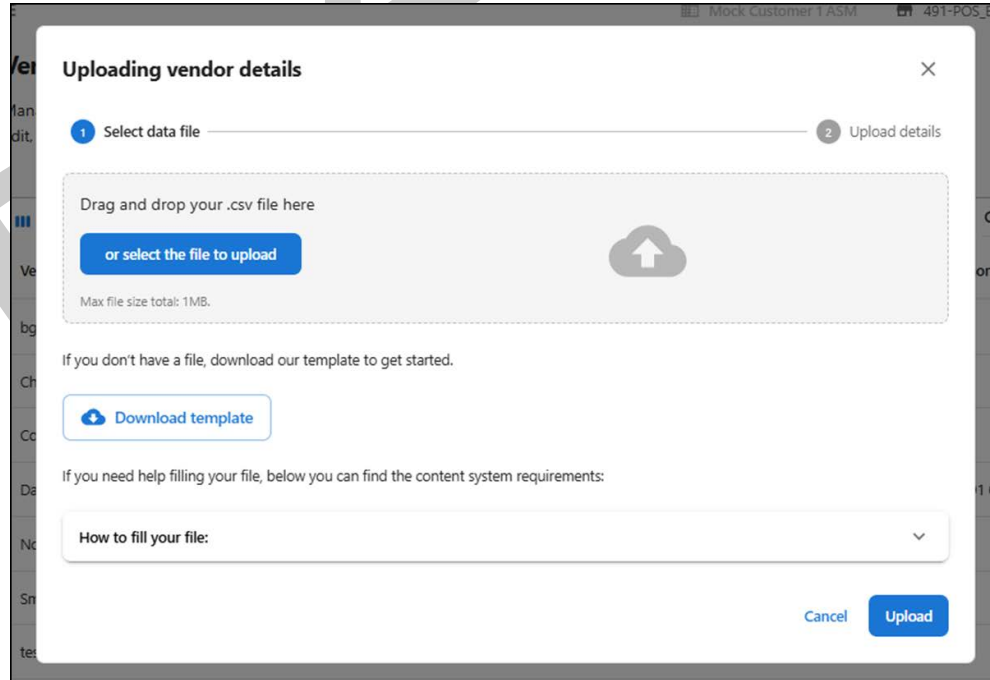
1. Select **Inventory > Vendors**. The available vendors appear in the 'Vendors' screen.
2. Select the **vendor** for which to upload vendor items in bulk. The vendor details appear with the 'General information' tab as the active tab.

3. Select the **Catalog** tab.



'Catalog' tab

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



'Uploading vendor details' screen when using .CSV file

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

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

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

Bulk vendor items details in .CSV file

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

Uploading vendor items

1 Select data file ————— 2 Upload details

Selected file:

vendor_item_starter_import_template.csv

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

Download template

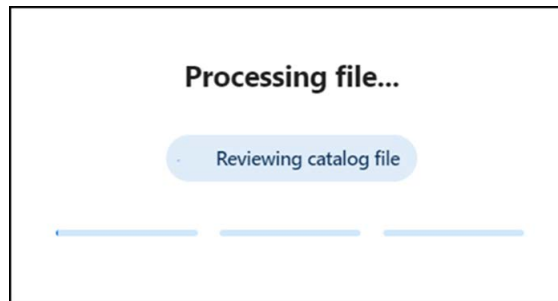
If you need help filling your file, below you can find the content system requirements:

How to fill your file:

Cancel Upload

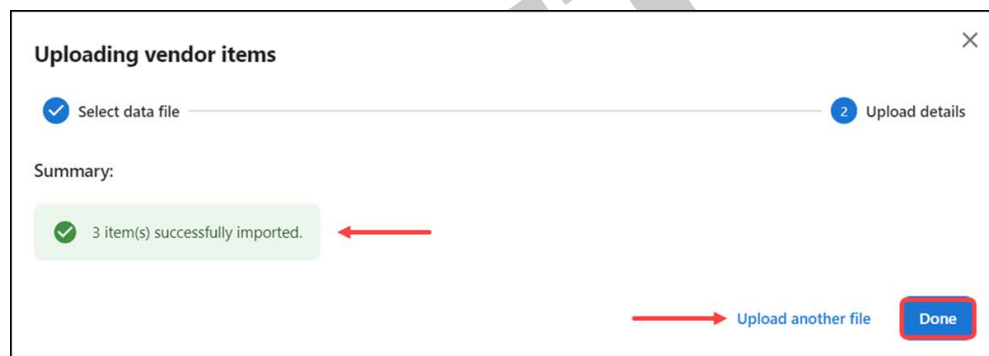
Selecting vendors items file list

The 'Processing file' status screen appears.



'Processing file' status screen

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



Bulk upload summary


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

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

Atlanta Organic Produce test details

General Information **Catalog** Order & delivery

(* Indicates required fields) Last edit was 11/7/2024 by acct:commerce@00u7dcnzmxkqujw697-ncr.cbo.eng.qe.adm+admin@gmail.com

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

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

[Filters](#) [Density](#)

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

Vendor items successful upload

Appendix B: Uploading an invoice

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

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



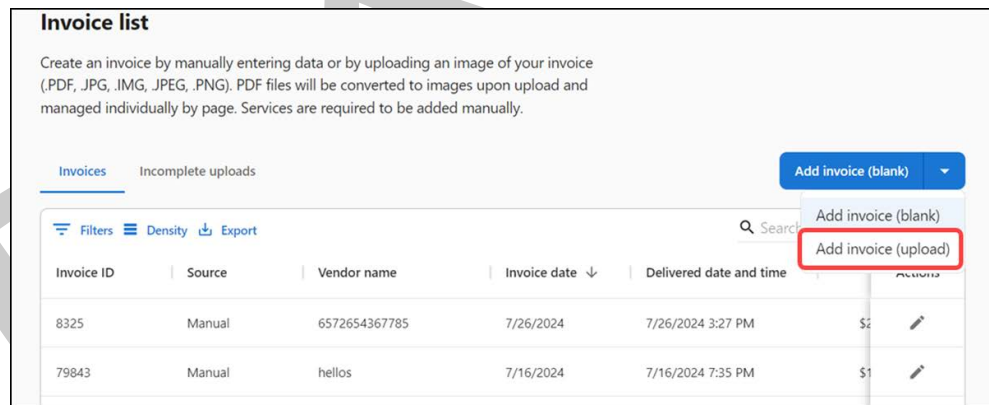
Tip

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

Uploading the invoice details

To upload the invoice details:

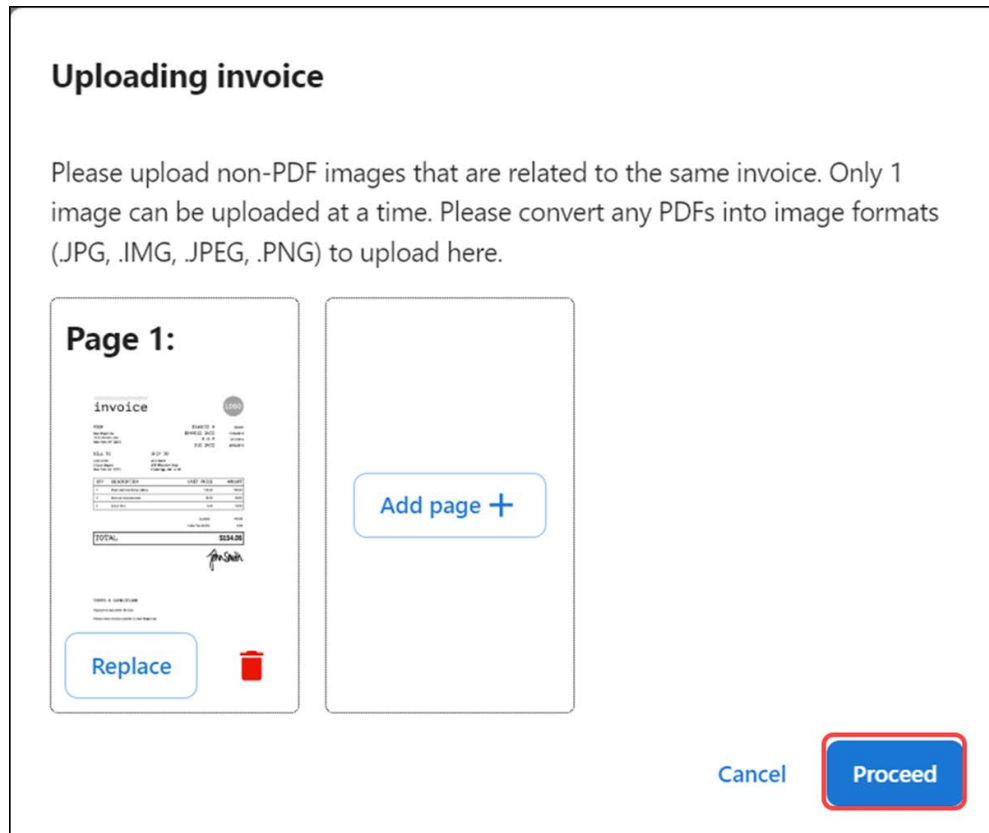
1. Select **Inventory > Invoices**. The 'Invoice list' screen appears.



'Invoice list' screen

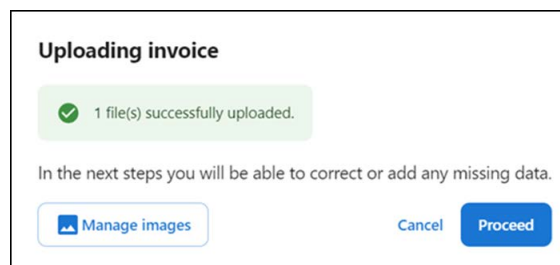
2. Select **Add invoice (upload)** from the 'Add invoice (blank)' drop-down list.

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



'Uploading invoice' screen

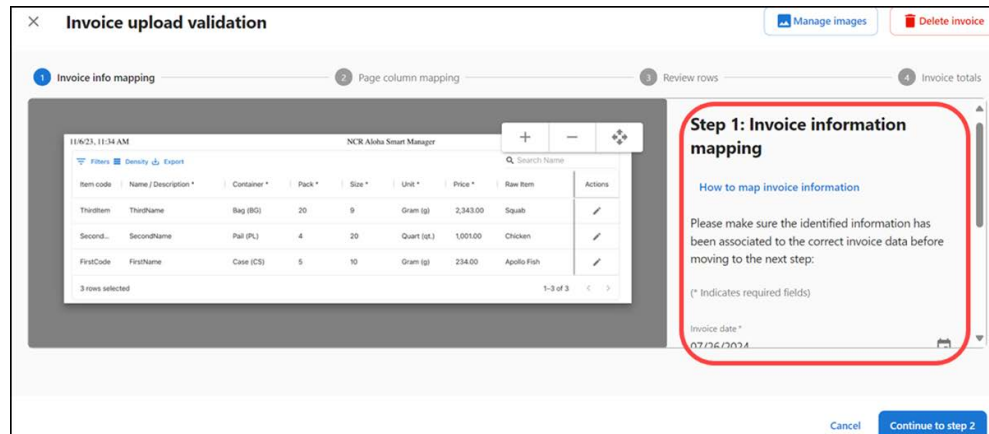
4. (Optional) Click **Add page +** to upload multiple images related to the same invoice.
5. Click **Proceed**. The 'Processing files' status screen appears. If your upload file meets the requirements, the 'Uploading invoice' success message appears.



'Uploading invoice' success message

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

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



'Invoice upload validation' screen

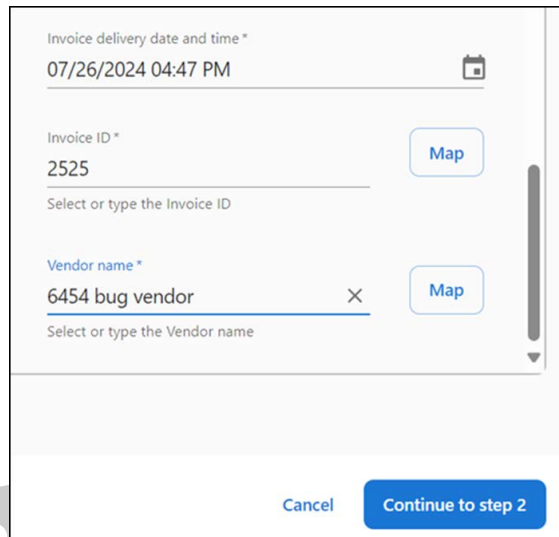
8. Continue to [Mapping invoice information](#) to begin the process of validating the uploaded invoice.

Mapping invoice information

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

Step 1: Invoice information mapping

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



The screenshot shows a form titled 'Invoice upload validation' with the following fields and actions:

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

At the bottom of the form are two buttons: 'Cancel' and 'Continue to step 2'.

Adding mapping details

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

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

Step 2: Page column mapping

[How to map invoice columns](#)

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

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

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

'Page column mapping' screen

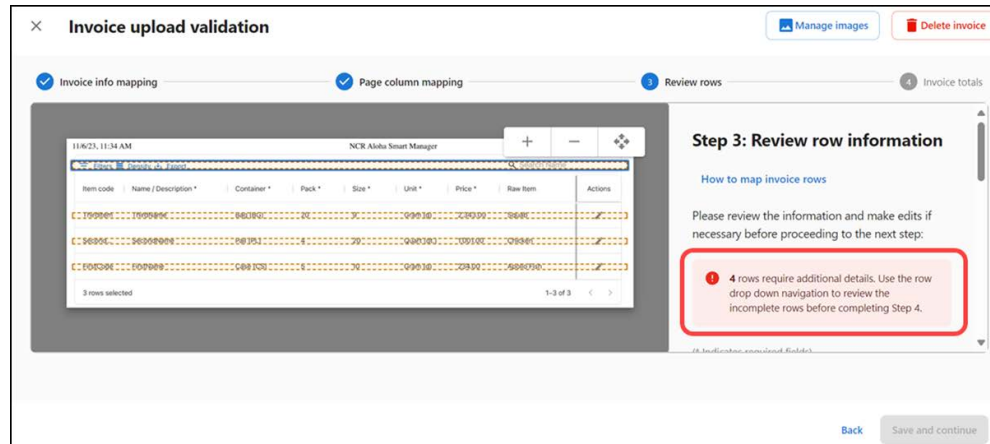
5. Continue to the **next procedure**.

Step 2: Page column mapping

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

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

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



'Review row information' screen

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

Step 3: Review row information

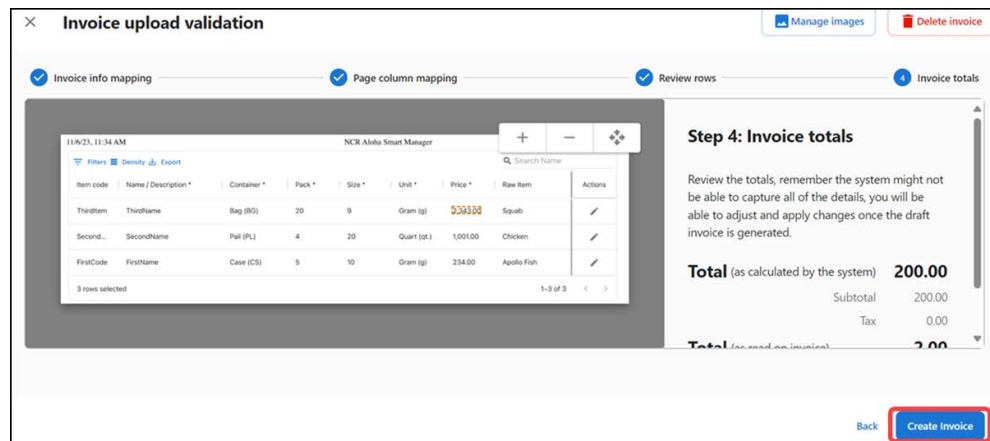
1. Review and correct the **item details** before submitting your invoice. Items that are already identified within the catalog are auto-populated with the registered details. For new items, you

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

Note

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

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



'Invoice upload validation' screen

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

Step 4: Invoice totals

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

The screenshot shows the 'Invoice details' screen in a draft state. At the top left, it says 'Invoice details' with a 'Draft' status indicator. At the top right, there is a 'Delete invoice' button. Below this, there is a note: '* Indicates required fields' and 'Last edit was 7/26/2024 by acct:commerce@00uepuczdxix5iwzt1d7-lm185162@ncr.com'. The form is divided into two main sections: 'Invoice information' and 'Vendor information'. Under 'Invoice information', there are two rows of fields: 'Invoice date *' with the value '07/26/2024' and a calendar icon, and 'Invoice delivery date and time *' with the value '07/26/2024 04:47 PM' and a calendar icon. Below these are 'Invoice ID *' with the value '2525' and 'Invoice comments'. Under 'Vendor information', there is a 'Vendor name *' field with the value '6454 bug vendor'. At the bottom of the form, there are three buttons: 'View images' (with a camera icon), 'Add item', and 'Accept invoice' (with a dropdown arrow). A 'Back' button is also visible at the bottom right.

'Invoice details' screen

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

Aloha Smart Manager with Aloha Cloud: Core + Advanced, 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