Feature Focus Guide:
Coupon Audit Count

Core Product: Aloha Quick Service, Aloha Table Service
Last Updated: June 20, 2024

Contents

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Revision Record

Date	Version #	Description
Prior to 11/08/2022	v12.3	Implemented Coupon Audit Count.
		Revised document to reflect v12.3 updates.
11/08/2022		Converted document to use new templates.
01/13/2023		Updated front cover and back page to reflect new NCR branding.
06/07/2024		Updated document to reflect NCR Voyix branding.

About Coupon Audit Count

Coupon Audit Count at a Glance	
Core Product	Aloha Quick Service or Aloha Table Service is required
Complementary Products	None
Separate License Required?	No
Other References	Aloha Quick Service Manager Guide or Aloha Table Service Manager Guide; Aloha Quick Service Reference Guide or Aloha Table Service Reference Guide

The Coupon Audit Count function, available in Aloha® Quick Service and Aloha Table Service, is an enhancement to the Checkout and Drawer Checkout reports and provides a simple, automated method for counting the coupons you receive.

💡 **Tip**
You can use the Coupon Audit Count function with either Payment Reconciliation or Drawer Reconciliation, or as a standalone feature; however, because you can only configure Coupon Audit Count to run from the Front-of-House (FOH), you must also configure Payment Reconciliation or Drawer Reconciliation to run from the FOH.

Benefits of Coupon Audit Count:

- You can define the number of reconciliation attempts allowed before requiring a manager to intervene.
- You can define the variance allowed for all or each coupon.
- You can require a coupon audit count by job code, cash drawer, or individual coupons.

The difference between the entered totals and the system-calculated totals must be within the specified requirements prior to the completion of a coupon audit count. If the reconciliation exceeds a specified number of checkout attempts, a message appears and an employee with sufficient access must approve it to complete the reconciliation.

SCENARIO: Fiona's Restaurant releases a popular 20-percent off coupon in the local Sunday news-paper. The cashier starts a normal checkout report and compares the total number of each coupon received, 14, against the system-generated total of 17. Unable to balance the number of coupons with the allowed number of attempts, she calls a manager who must force the reconciliation.
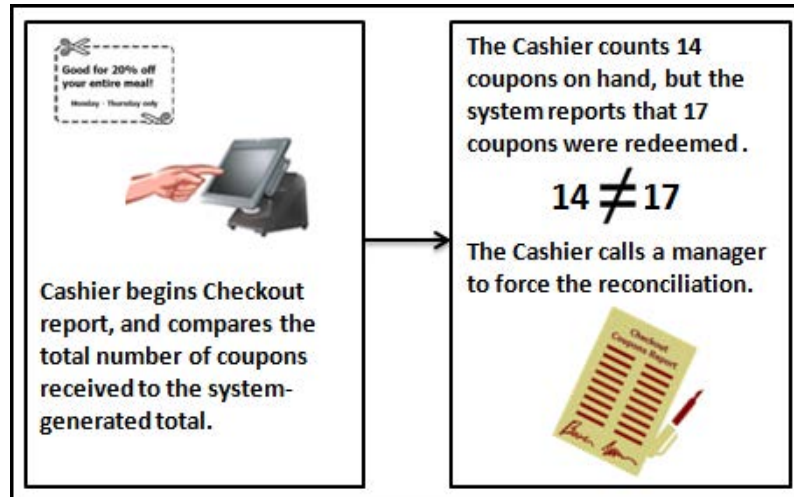

Figure 1 Coupon Audit Count At Checkout

Configuring Coupon Audit Count

This section details the configuration requirements for Coupon Audit Count. You must access several functions to complete the configuration. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Procedures at a Glance:	
If you are viewing this document using Adobe Acrobat Reader, click each link for detailed information regarding the task.	
1.	Access **Maintenance > Payments > Promotions** to specify the coupons to include in the audit count, and the number of times you can attempt to reconcile before requiring approval. See page 6.
2.	Access **Maintenance > Labor > Jobcodes** to require employees clocked in under that job code to perform a coupon audit, or **Maintenance > Hardware > Cash Drawers** to require a coupon audit for a particular cash drawer. See page 9.
3.	Access **Maintenance > Labor > Pos Access Levels** and select 'Force Reconciliation' for access levels that can override a reconciliation when over the defined number of attempts. See page 10.
4.	Access **Utilities > POS > Refresh POS & All Installed Products** to update the information on the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. See page 11.

Defining coupons for audit

Use the options in Maintenance > Payments > Promotions to define the coupon audit count requirements for each type of coupon you accept. You can establish a variance quantity for each type of coupon. This is the acceptable number you can be over or short from the number the system expects you to have. At the end of the audit process, the system compares the difference between the number you enter during the audit and the system-generated number to the variance number for each coupon. If the difference is within the acceptable variance, the process completes. If any coupon total is outside the acceptable variance, you must attempt the audit process again.

To set up coupons for inclusion in coupon audit count:

1. Select **Maintenance > Payments > Promotions**.
2. Select the **coupon** from the 'Promo' drop-down list.

3. Select the **Coupon** tab.

Figure 2 Promotions - Coupon Tab

4. Select **Audit count at checkout** to require a count of the total number of this type of coupon received, upon checkout.

5. Type the **variance quantity allowed** for the selected coupon. This determines the number this coupon can differ when verifying totals for audit. The variance amount applies to over and under the total entered for the audit.

6. Click **Save**.

7. Repeat **steps 2 through 5** for each coupon to include for audit.

8. Exit the **Promotions** function.

> 📖 **Reference**
>
> Refer to the Promotions function in the Aloha Quick Service Reference Guide or Table Service Reference Guide for more information on coupons.

Choosing the method to use for coupon audit count

You can require a coupon audit based on your business operations and where you collect the coupons you receive, using the following methods:

By Job Code — Requires individual employees clocked in under a particular job code to perform a coupon audit count. In a server banking environment where servers typically do not have a cash drawer and coupons are collected at the time of their checkout, configure the system to require a coupon audit count by job code.

By Cash Drawer — Requires you to perform a coupon audit count for a particular cash drawer. In a cashier environment where a cash drawer is used and coupons are collected at the time you close the drawer, configure the system to require a coupon audit count by cash drawer.

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Requiring coupon audit count by job code

Use options in the Audit group box in Maintenance > Labor > Jobcodes, if you want all employees clocked in under the selected job code to perform a coupon audit count during checkout.

To require coupon audit count by job code:

1. Select **Maintenance > Labor > Jobcodes**.
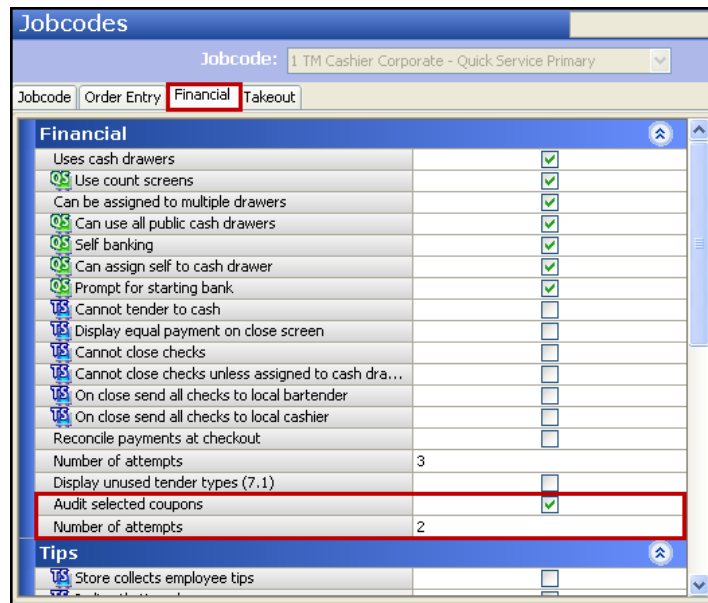2. Select the **Financial** tab.

Figure 3 Jobcodes - Financial Group Bar

3. Select the **appropriate job code** from the 'Jobcode' drop-down list.
4. Under the 'Financial' group bar, select **Audit selected coupons** to require the job code to perform a coupon audit count at checkout for all qualifying coupons. *Required Options:* You must select 'Audit count at checkout' for each coupon in Maintenance > Payments > Promotions to qualify a coupon for audit count.
5. Type the **number of reconciliation attempts allowed** for the coupon count before a manager, or employee with sufficient access, is required.
6. Click **Save.**
7. Repeat **steps 3 through 6** for each job code required to perform a coupon audit at checkout.
8. Exit the **Jobcodes** function.

> **Reference**
>
> Refer to the Jobcodes function in the Aloha Quick Service Reference Guide or Table Service Reference Guide for more information on job codes.

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Requiring Coupon Audit Count by Cash Drawer

Use options in the Audit group box in Maintenance > Hardware > Cash Drawers, if you want all employees assigned to the selected cash drawer to perform a coupon audit count during checkout.

To require coupon audit count by cash drawer:

1. Select **Maintenance > Hardware > Cash Drawers**.
2. Select a **cash drawer** from the 'Cash Drawers' drop-down list.

Figure 4 Cash Drawers Tab - Setting Group Bar

3. Select **Audit selected coupons** to specify the employee assigned to the cash drawer must perform a coupon audit count at checkout for all qualifying coupons. ***Required Options:*** You must select 'Audit count at checkout' in Maintenance > Payments > Promotions > Coupon Tab to qualify the coupon for audit count.
4. Type the **number of reconciliation attempts allowed** for the coupon count before a manager, or employee with sufficient access, is required.
5. Click **Save**.
6. Repeat **steps 2 through 5** for all cash drawers for which you want to require coupon reconciliation.
7. Exit the **Cash Drawers** function.

> 📖 **Reference**
>
> Refer to the Cash Drawers function in the [Aloha Quick Service Reference Guide](#) or [Table Service Reference Guide](#) for more information on cash drawers.

Providing the ability to force coupon audit

If an employee unsuccessfully attempts to audit their coupons more than the specified number of reconciliation attempts, as defined in Jobcodes or Cash Drawers, the Manager Approval screen appears. You must give an employee, such as a manager, an access level with sufficient access to approve and force the audit.

To set an access level with the ability to force a coupon audit:

1. Select **Maintenance > Labor > Pos Access Levels**.
2. Select an **access level**, such as Manager, from the 'POS Access Level' drop-down list.
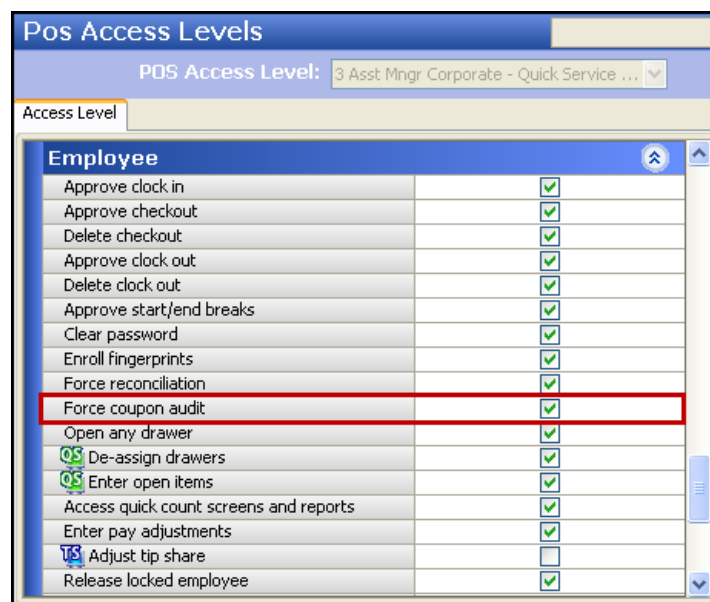
Figure 5 Pos Access Levels - Access Level Tab

3. Select **Force coupon audit** to enable the employee to override the error message and force a reconciliation of a coupon audit, after exceeding the defined number of attempts.
4. Click **Save**.
5. Repeat **steps 2 through 4** for all access levels that can force a reconciliation.
6. Exit the **Access Levels** function.

> 📖 **Reference**
>
> Refer to the Access Levels function in the Aloha Quick Service Reference Guide or Table Service Reference Guide for more information on access levels.

Refreshing data

After all settings are in place in Aloha Manager, it is necessary to select Utilities > POS > Refresh POS & All Installed Products to transfer the new information to the FOH terminals, or wait for the End-of-Day (EOD) process to accomplish the data refresh for you. If you run the refresh prior to the EOD process, select 'Automatically restart all POS terminals' and click OK to continue. After the data refresh is complete, all new settings become operational across the Aloha network.

> ⚠️ **Caution**
> Refresh data with caution and never during peak hours of operation. All FOH terminals reboot during a refresh and are down for a short period of time.

Using Coupon Audit Count

After you configure the Coupon Audit Count feature, you can run Coupon Audit Count with the Checkout report. If you do not collect any coupons that require an audit, the Coupon Audit Count function is not needed, and therefore, does not run. Although you can run the feature as a standalone function, the Coupon Audit Count runs after any configured reconciliation feature.

The checkout process is then depicted as follows:

1. Select the **Checkout** button.
2. Perform **Payment Reconciliation** or **Drawer Reconciliation**, if configured.
3. Transfer **declared amounts** to a deposit, if configured.
4. Perform **Coupon Audit Count**.
5. Clock **out** of the system.

To perform Coupon Audit Count:

1. Start your **normal checkout process**. A confirmation message appears, asking 'Are you ready to run your checkout?'
2. Touch **Yes** to continue.
3. If either Payment Reconciliation or Drawer Reconciliation is initiated, complete the **reconciliation**. The Enter Coupon Count screen appears.

Figure 6 FOH Enter Coupon Count Screen

The screen includes all coupons defined for inclusion in Coupon Audit Count and for which coupons were applied. Pressing OK starts an attempt at reconciliation, therefore, do not press Done until you enter the information for each coupon type in the list. The number of times you attempt to enter your coupon count appears in the lower right corner. Once you exceed the defined number of attempts, a manager, or an employee with sufficient access must approve the coupon audit.

4. Using the numeric keypad, enter the **number of coupons collected for the first coupon** and touch **Enter**.

5. Repeat **step 4** to enter the total for each coupon.

6. When you are ready to reconcile, touch **OK**. The system compares the amounts you entered with the system-generated amounts. The system then compares the variances of each coupon to the acceptable amount of variance per coupon. If all amounts are within the acceptable limits, the Coupon Audit Count function exits. If the totals are not within the acceptable limits, a confirmation screen appears and indicates the coupons are outside of their defined limits.
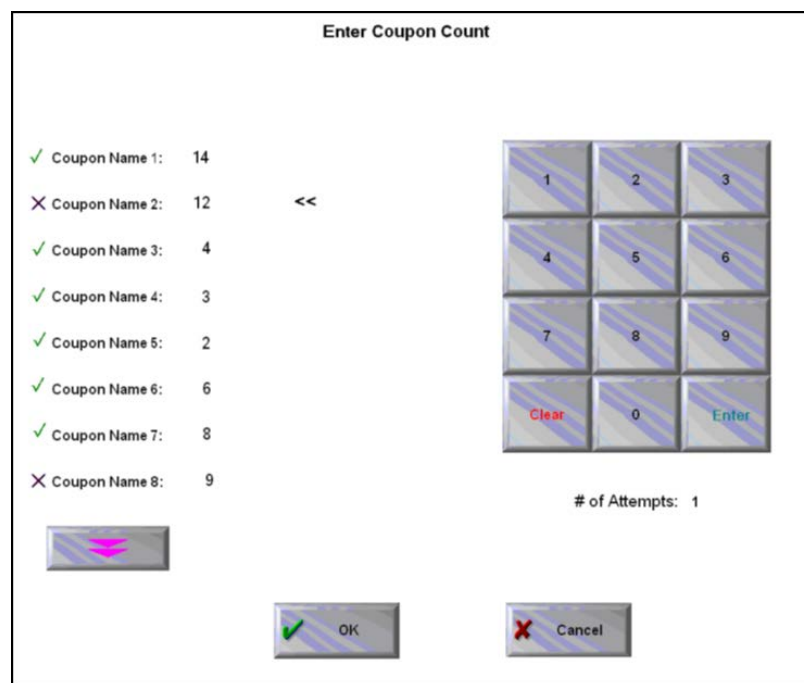

Figure 7 FOH Coupon Counts Variances

Coupons within the acceptable limit appear with a green check mark beside them. Coupons outside the acceptable limit appear with a black and red X beside them. Review any coupon type with an X for recount. When selected, both colors turn to blue. The '# of Attempts' increments to

the next number. You can reprocess up to the user-defined number of attempts before intervention is required.

> 💡 **Tip**
>
> These colors may vary depending on the display properties of your system.

7. If you did not reconcile, **fix** the problem coupon, and touch **OK** again, up to the defined number of times you can reconcile.

   If the number of unsuccessful tries exceeds the defined number of attempts you are allowed, the manager approval screen appears.
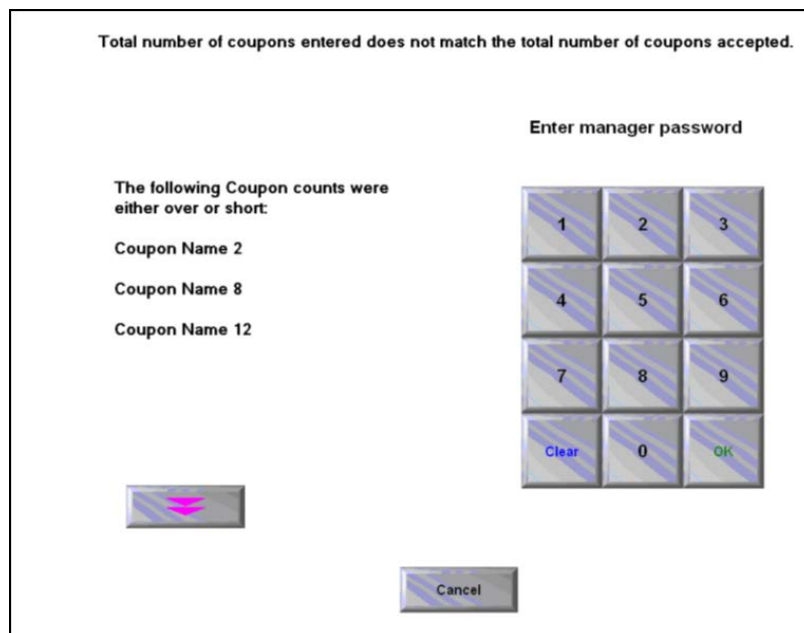

Figure 8 FOH Manager Approval Screen

8. A manager, or an employee with sufficient access, must enter their **password** and touch **OK**.
9. Complete the **checkout process**.

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Reporting Coupon Audit Count

After reconciling all coupons, the Coupon Audit information chit prints to the local printer, as shown in the first example for a coupon audit count by job code, and shown in the second example for a coupon audit count by cash drawer.

Example 1 Audit by Job Code				Example 2 Audit by Cash Drawer			
Coupon Audit Information				**Coupon Audit Information**			
Unit #117			10/7/2005	Unit #117			10/7/2005
Edward Jones (Eddy)			9:46 AM	Drawer 1			9:46 AM
Shift: 1							
	Exp	Cnt	Var		Exp	Cnt	Var
Coupon Name 1	20	20	0	Coupon Name 1	20	20	0
Coupon Name 2	14	13	-1	Coupon Name 2	14	13	-1
Coupon Name 3	12	12	0	Coupon Name 3	12	12	0
Coupon Name 4	6	2	-4	Coupon Name 4	6	2	-4
Coupon Name 5	7	8	1	Coupon Name 5	7	8	1
Total	59	55	-4	Total	59	55	-4
Employee X_____				Employee X_____			
Rcvd by X _____				Rcvd by X _____			

Figure 9 Coupon Audit Information Chit, Two Examples

Troubleshooting Coupon Audit Count

The following troubleshooting scenarios may occur when using the Coupon Audit Count feature:

Cannot Reconcile after End-of-Day (EOD) Runs

If the EOD occurs before you complete a reconciliation, the EOD function deletes the existence of the coupon audit count. The checkout will remain as is, and you are not able to perform the coupon audit count.

Coupons Were Collected, But the 'Enter Coupon Audit Count Screen' Does Not Appear

If you collected coupons for the shift, but the Coupon Audit Count screen does not appear during the checkout process, then the collected coupons were not configured for auditing. The screen did not appear because none of the coupons configured for audit were collected. Access Maintenance > Payments > Promotions and select 'Audit count at checkout' for each necessary coupon.

Coupon Audit Count, Feature Focus 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