Feature Focus Guide:
Sales and Tip Distribution

Core Product: Aloha Table Service
Last Updated: December 13, 2023

Contents

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Revision Record

Date	Version #	Description
Prior to 01/20/2023	v5.3.2+	Renamed and enhanced Team Tip Distribution to become Tip and Sales Distribution.
	v14.1	Renamed and enhanced Tip and Sales Distribution to Sales and Tip Distribution with added FOH capability.
	v14.2	The clock in acknowledgment screen now includes sales, credit card tips, gratuity, and wage gratuity adjustments on the FOH during clock in. Added the ability to run the Sales and Tip Distribution report from a menu option in the BOH.
01/20/2023		Converted the document to use new templates. Updated the front cover and back page to reflect new NCR branding.
12/13/2023		Updated document to reflect NCR Voyix branding.

About Sales and Tip Distribution

Sales and Tip Distribution at a Glance	
Core Product	Aloha Table Service
Complementary Products	No
Separate License Required?	No
Other References	Aloha Table Service Manager Guide, Aloha Table Service Reference Guide, Aloha Table Service Report Guide, Tip Declaration Feature Focus Guide, Custom Checkout Feature Focus Guide, Tip Share Distribution Feature Focus Guide

Sales and Tip Distribution (formerly known as Tip and Sales Distribution and Team Tip Distribution) enables you to distribute sales and tips among all employees who work in cooperation with each other as a team to provide service. You can configure it so that only one person on a team can access and modify the check, or every person on a team can access and modify the check. This Aloha® Table Service feature also benefits restaurants with multiple bartenders working the same shift, and to-go environments with multiple order entry personnel.

SCENARIO: LARGE PARTIES A large party arrives at your restaurant for a birthday celebration. The manager pulls several tables together and assigns three servers to work the table. As soon as a server starts a table (creates the check), the manager creates a check team consisting of the three servers. The job code under which the servers log in determines who owns the sales and financial responsibility of the check; however, the system performs an automatic even distribution of the sales responsibility and tip to each member on the team when a team member closes the check. A manager can then use the Back-of-House (BOH) distribution function to redistribute the sales and tip using varying percentages, if desired and if current day is enabled for this function, or wait until the next business day to do the redistribution.

SCENARIO: TEAM SERVICE ENVIRONMENTS Your restaurant works in a team service environment where the servers work in cooperation with each other to provide service throughout a shift. Each member of the team can access a team check, make changes, and close the check. The manager creates several shift teams consisting of the employees on each team. The job code under which the employees log in determines who owns the sales and financial responsibility of each team check; however, the system performs an automatic even distribution of the sales responsibility and tip to each employee on the team when a team member closes a check. A manager can then use the BOH distribution function to redistribute the sales and tip using varying percentages, if desired and if current day is enabled for this function, or wait until the next business day to do the redistribution.

SCENARIO: BARTENDERS Your bartenders work together in a team service environment. Each bartender can access any tab, add drinks, and tender and close the tab when the guest is ready to leave. The manager creates a shift team consisting of the bartenders scheduled to work the shift. The job code under which the bartenders log in determines who owns the sales and financial responsibility of

each tab; however, the system performs an automatic even distribution of the sales responsibility and tip to each bartender on the team when a team member closes a tab. A manager can then use the BOH distribution function to redistribute the sales and tip using varying percentages, if desired and if current day is enabled for this function, or wait until the next business day to do the redistribution.

SCENARIO: TOGO COUNTERS Your restaurant provides a "to go" counter, where guests call ahead, place an order, and pick it up at a designated time. You have two employees working this counter, one to take orders and one to assemble and bag the orders in preparation for the guest. The manager creates a shift team consisting of the employees scheduled to work the shift. The job code under which the employees log in determines who owns the sales and financial responsibility of each check; however, the system performs an automatic even distribution of the sales responsibility and tip to each employee on the team when a team member closes a check. A manager can then use the BOH distribution function to redistribute the sales and tip using varying percentages, if desired and if current day is enabled for this function, or wait until the next business day to do the redistribution.

How does the system know to whom to distribute the sales and tips?

Managers create teams of employees who work in cooperation with each other to provide service. The team can be a group of employees who work an entire shift together (shift team), or a group of employees who work a single table together (check team). If a restaurant uses a labor scheduler, such as the basic labor scheduler available within the Aloha Point-of-Sale (POS) system or Back Office (NBO), a manager can create a shift team before the required employees clock in; however, an employee must either be scheduled to work or already on the clock for a manager to add them to a team. A server must have already started a table (created a check) before a manager can create a check team.

> 💡 **Tip:** Only employees with order entry capability appear in the selection list when you create teams.

Once you create a team, the system offers the flexibility of adding or removing employees from the team, as needed. You can configure the system so that only one person on a team, or multiple people on a team, can access and modify a team check.

- All employees assigned to a team must clock in using a job code with order entry capability, and if an employee on the team other than the employee who starts the check needs the ability to access and modify a team check, that employee must clock in using a job code with 'team service get check' capabilities.

> 💡 **Tip:** If you also use tip-share pools, if one member of the team logs in under a job code configured to contribute to a tip-share pool, all employees on the team must log in with a job code configured to contribute to a tip-share pool. Refer to the Tip Share Distribution Feature Focus Guide.

- As soon as a member of the team closes a team check, the system performs an automatic equal distribution of the sales and tip to each employee on the team. If only the employee who starts the

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check can access and make changes to the check, the financial responsibility remains with that employee; however, if each employee on the team can access and make changes to a team check, how you configure the job code for "team service get check" capability determines who has financial ownership.

- It is common for an employee on a team to clock out before the team closes all team checks for which that employee also provided service. A team member who assists with a check may receive a share of the sales and tip if (1) the team member is on the clock at some point during the life cycle of the check, and (2) a team member closes the team check within the 'grace period' allowed after clocking out that allows an employee to be included in the sales and tip distribution. For example, Nick opens a check at 5:30 p.m. Elliot assists a team by entering orders and serving food. Elliot clocks out at 7:05 p.m., and the check is still open. Nick closes the check at 7:15 p.m. By configuring the system to allow 15 minutes after an employee clocks out for an employee to be included in the distribution for team checks still open, Elliot is rewarded for his service.

- As a best practice and if at all possible, it is best if the distribution of the sales and tip for each check is how you want it before your employees clock out and declare their tips for the day. This reduces the number of corrections to declared tips that have to be done later using the Edit Punches function.

How does the sales and tip distribution occur?

The actual sales and tip distribution can occur using several methods:

- Automatically, when you close a check serviced by a shift or check team. The system distributes the sales and tips equally among the employees on the team. You can manually redistribute the check later, if needed. If you reopen a team check, any adjustments, such as voids and item additions, cause the system to redistribute the sales and tip upon close of the check, based on the new amounts.

- Manually, from the Front-of-House (FOH). You can perform redistribution from the FOH for the current day only, as many times as needed. The system distributes the checks equally among the employees on the team.

- Manually, from the BOH. Depending on the configuration, you can perform redistribution from the BOH for both current and previous days, or only for previous days, as many times as needed until the payroll end date. You can stipulate to do the redistribution by a designated percentage or equally among all employees on the team. When you redistribute a check on the next business day or after an employee on the team has already clocked out, the system corrects the reported sales and tip amounts, but you need to access Edit Punches to change the declared tips for each employee on the team.

How does each employee receive notification of their sales and tips?

The employee checkout report reflects the total sales, charge tips, gratuity, and tip-share contribution for both team sales and individual employee sales, making the employee aware of sales received by working in cooperation with a team to provide service, if any.

The check out report provides the exact amount of sales allocated to the employee for payroll and tax purposes, as well as the amount of charge tips and gratuities. If the employee contributes to a tip-share pool, the system shows the tip-share contribution for the employee based on the most current distribution of sales; all of which assist employees in the most accurate tip declaration, as well as more accurate reporting of tippable sales.

Additionally, the system allows a manager to redistribute the sales and tips for checks already distributed while providing notification to both manager and employee of the adjustments. When an employee checks out or clocks out, the employee checkout report and the tip declaration screen reflect the appropriate distribution of sales and tips for that employee. It is possible to print a disclaimer on the bottom of both the checkout report and the clock-out chit alerting the employee that the information is subject to change if redistribution occurs.

If redistribution occurs after an end of day, it is also possible for an acknowledgment to appear at clock in on the next business day for any employee who worked on the team check, letting them know of the redistribution and prompting for approval.

Configuring Sales and Tip Distribution

This section details the configuration requirements within Aloha Manager and Aloha Configuration Center (CFC) for Sales and Tip Distribution. If you are an experienced user, refer to Procedures at a Glance for abbreviated steps. If you prefer more detail, continue reading this document.

Sales and Tip Distribution 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 > Labor > Pos Access Levels** to provide an employee, such as a manager, with the access to manage teams and distribute sales and tips from the FOH. See page 9.
2.	Access **Maintenance > Labor > Security Roles** to provide an employee, such as a manager, a sufficient security role to access and run the Sales and Tip Distribution function from the BOH, as well as the report that is available from the Reports menu. See page 10.
3.	Access **Maintenance > Business > Store** to establish whether you allow the sales and tip distribution for checks from previous days, checks from the current day, or checks from both, when using the BOH Sales and Tip Distribution function. See page 11.
4.	Access **Maintenance > Business > Store > Store Settings** tab **> Labor** group **> 'Clock In/Out'** group bar to define a 'grace period' after clocking out that allows an employee who assisted the team to be included in the sales and tip distribution. See page 12.
5.	Access **Maintenance > Labor > Jobcodes** to configure a job code with team service capabilities, if your environment requires that each member of a team access and modify the check for a table they are serving in cooperation with each other. This is not required if only the team member who starts the check will add items and close the check. See page 13.
6.	Access **Maintenance > Messaging > Guest Check Message** to create a sales and tip disclaimer message and then access **Maintenance > Business > Store > Store Settings** tab **> Report Printing** group to print the disclaimer on the employee checkout report and access **Maintenance > Labor > Jobcodes > Financial** tab to print the disclaimer on the clock-out chit. See page 15.
7.	Access **Maintenance > Messaging > Clock In Message** to create an acknowledgment message to appear at clock in and alert an employee of any sales and tip adjustments. Access **Maintenance > Labor > Jobcodes** to enable the acknowledgment to appear at clock in on the next business day, by job code. See page 17.
8.	Access **Utilities > POS > Refresh POS & All Installed Products** to refresh your POS system. See page 19.

Providing the ability to manage teams and distribute sales and tips from FOH

The Aloha POS system allows you to provide an employee, such as a manager, with the access to manage teams and distribute sales and tips from the FOH. Once you configure the access level, two new buttons appear on the second page of the FOH Special Functions > Financial screen: Manage Sales and Tip Distribution Teams and Sales and Tip Distribution. The system distributes sales and tips automatically when you close a check, based on the employees assigned to the shift or check team that serviced it, but you can use the FOH Sales and Tip Distribution button to manually redistribute the sales and tips again before end of day, if needed. The FOH distribution allows only for equal distribution among the employees on the shift or check team. If you need to delegate different distribution percentages per employee, you can use the BOH distribution function, if distribution for current day is enabled, or wait until after end of day to perform the redistribution using the BOH distribution function.

> **Note:** Only employees who log in under a job code with the ability to perform order entry appear in the list when a manager creates a shift or check team.

To provide the ability to manage teams and distribute sales and tips from the FOH:

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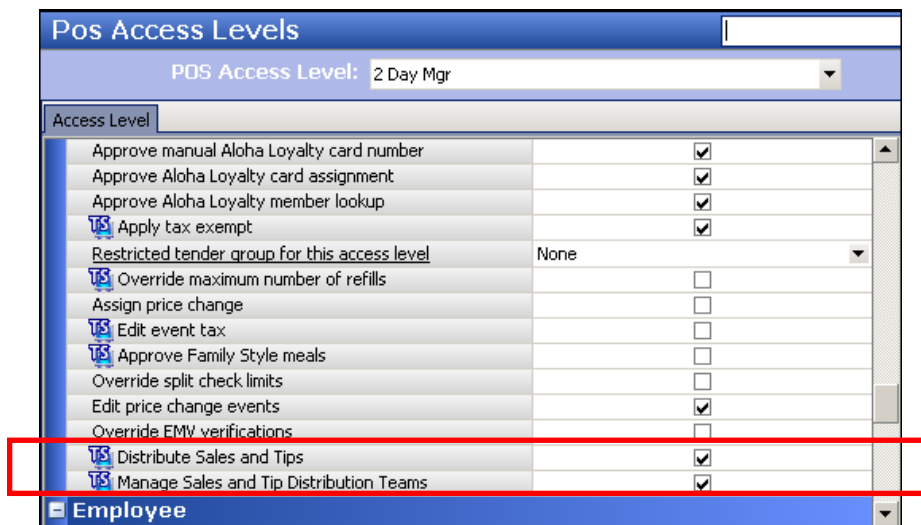
Figure 1 Access Level Tab - Financial Group Bar

3. Under the 'Financial' group bar, select **Distribute Sales and Tips** so that an employee assigned to this access level can manually distribute sales and tips from the FOH.
4. Select **Manage Sales and Tip Distribution Teams** so that an employee assigned to this access level can manage shift and check teams for the automatic distribution of sales and tips.
5. Click **Save**.

6. Repeat this **procedure** for each access level requiring the ability to perform sales and tip distribution functions from the FOH.

7. Exit the **Pos Access Levels** function.

Providing access to sales and tip distribution function and report from the BOH

You must have a sufficient security role to access and run the Sales and Tip Distribution function from the BOH, as well as the report that is available from the Reports menu. If your security role does not include this access, the menu options do not appear when you log in to the BOH. Once your security role has access, you can distribute sales and tips using Functions > Sales and Tip Distribution and run the report from Reports > Aloha Point-of-Sale > Employee > Sales and Tip Distribution. You can also run the report while you are in the Sales and Tip Distribution function by selecting a date and clicking Print Report on the Tip and Sales Distribution screen.

To provide access to the Sales and Tip Distribution function and report from the BOH:

1. Select **Maintenance > Labor > Security Roles**.

2. Select the **security role** to which you want to allow access to the BOH Sales and Tip Distribution functions.

3. Select the **POS** tab.
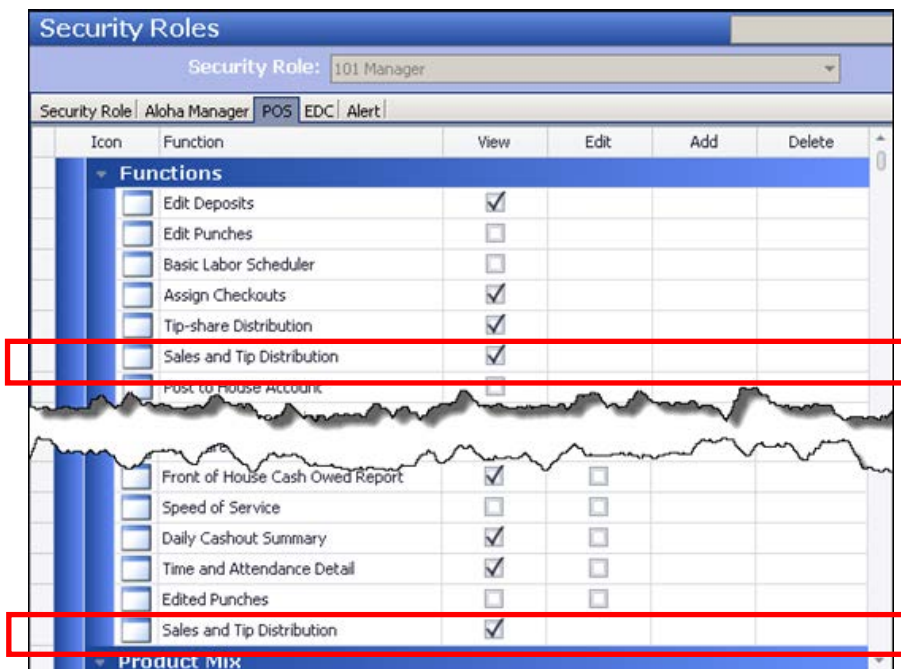
Figure 2 Security Roles - POS Tab

4. Under the 'File > Functions' group bar, click **View** for Sales and Tip Distribution, to allow an employee with this security role to distribute sales and tips from the BOH using Functions > Sales and Tip Distribution.

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5. Under the 'Reports > Employee' group bar, click **View** for Sales and Tip Distribution to allow an employee with the appropriate access to view the report from the BOH, external to running the distribution function, using Reports > Aloha Point-of-Sale > Employee > Sales and Tip Distribution.

6. Click **Save**.

7. Repeat this **procedure** for any other security roles requiring access to the Sales and Tip Distribution functions from the BOH.

8. Exit the **Security Roles** function.

Establishing days available when performing sales and tip distribution from the BOH

You must establish whether you allow the sales and tip distribution for checks from previous days, checks from the current day, or checks from both, when using the BOH Sales and Tip Distribution function.

To establish the days available when performing sales and tip distribution from the BOH:

1. Select **Maintenance > Business > Store**.

2. Select the **Store Settings** tab.

3. Select the **Security** group located at the bottom of the screen.
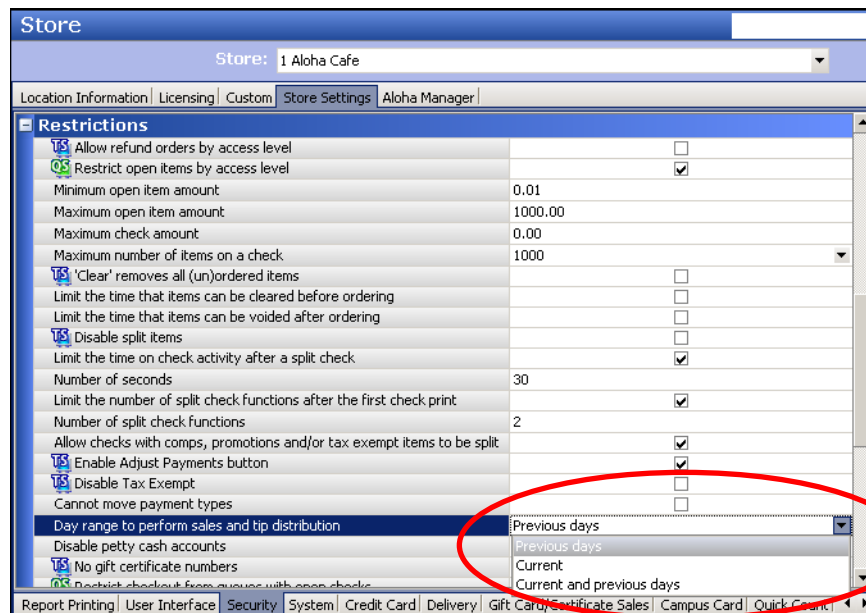
Figure 3 Store Settings Tab - Security Group

4. Under the 'Restrictions' group bar, select **Previous days**, **Current**, or **Current and previous days** from the 'Day range to perform sales and tip distribution' drop-down list. This controls the

dates that appear in the 'Select Date of Business' list box when you run the Sales and Tip Distribution Function from the BOH.

5. Click **Save** and exit the **Store** function.

Defining the minutes after clock out an employee is eligible for automatic distribution

It is common for an employee on a team to clock out before the team closes a check for which the employee provided service. Define a 'grace period' within which you must close a team service check for a team member who assisted the team but has clocked out to still be eligible for automatic distribution of the sales and tips. For example, Nick opens a check at 5:30 p.m. Elliot assists a team by entering orders and serving food. Elliot clocks out at 7:00 p.m., and the check remains open. Nick closes the check at 7:15 p.m. By configuring a 15 minute grace period after clocking out, Elliot is rewarded for his service.

To define the number of minutes after clocking out an employee is still eligible for automatic distribution of sales and tips:

1. Select **Maintenance > Business > Store**.
2. Select the **Store Settings** tab.
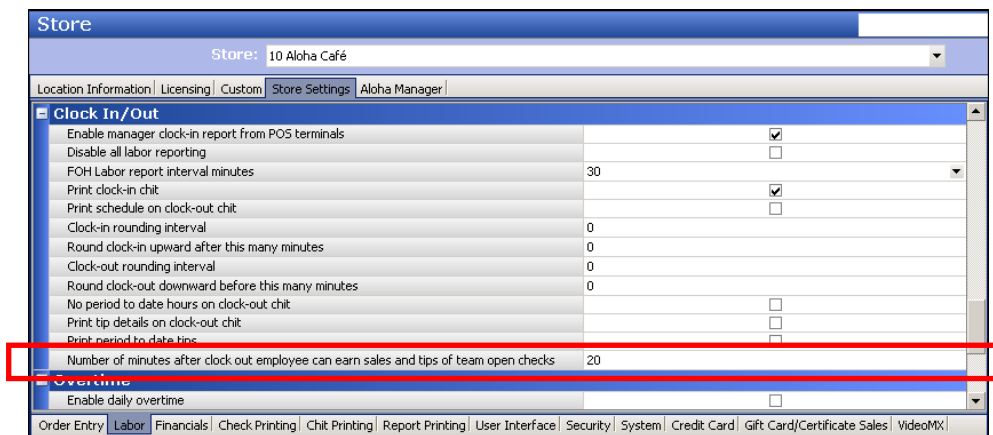
Figure 4 Store Settings Tab - Labor Group

3. Select the **Labor** group located at the bottom of the screen.
4. Under the 'Clock In/Out' group bar, type the **number of minutes after a team member clocks out** within which you must close an open team check for that team member to still be eligible for automatic distribution of the sales and tips.
5. Click **Save** and exit the **Store** function.

Creating a job code with team Service Capabilities

If your environment requires that each member of a team have the ability to access and modify the check for a table they are serving in cooperation with each other, each employee on the team must log in using a job code configured with "team service get check" capabilities. The sales and tip distribution occurs for each employee within the team regardless, but the employees must be configured for "team service" if they need to access a check to add items or tender and close the check.

To configure a job code for "team service get check" capabilities:

1. Select **Maintenance > Labor > Jobcodes**.
2. Select an **existing job code** with order entry capability or click **New** to create a new job code.
3. If this is a new job code, type a **name** for the job code, such as 'TeamSrv.'
4. Type a **description** to help identify the job code, such as 'Team Service Get Chk.'
5. Select the **Order Entry** tab.

Figure 5 Job Code with Team Service Get Check

6. Under the 'Team service get check' group bar, select **Can view and access all team checks** to allow an employee logged in under this job code to access and modify any check opened by another employee on their shift or check team.

7. Select a **labor group** from the 'Limit to labor group' drop-down list to allow an employee logged in under this job code to only access checks opened by an employee within that labor group, if needed.

8. Select **how to handle check ownership** in a team service environment from the 'Automatically transfer ownership to' drop-down list. Check ownership is the assumption of all financial responsibility for that check, as well as all reported sales. Choose 'None,' if you want ownership to remain with the originator of the check. Choose 'Person running get check,' to transfer ownership to the person currently working with the check. Choose 'Person closing the check,' if you want ownership to always belong to the person who tenders and closes the check.

> 💡 **Tip:** When you use job codes configured with "team service get check" capability in conjunction with Sales and Tip Distribution, the system designates financial and sales ownership using the selection in 'Automatically transfer ownership to.' If the employee is part of a team, and the check is a team check, the financial responsibility follows the setting, but the system distributes the sales and tip among the members of the team at check close.

9. Click **Save**.

10. Repeat this **procedure** for any other job code requiring team service get check capabilities.

11. Exit the **Jobcodes** function.

Creating a sales and tip distribution disclaimer for employees

If you want to warn an employee that their sales and tips are subject to change as a result of further sales and tip distribution, you can configure the system to print a message on their checkout report, their clockout chit, or both.

To create a sales and tip disclaimer message:

1. Select **Maintenance > Messaging > Guest Check Message**.
2. Click **New** and accept the **system assigned number** or click the **ellipsis button (...)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number**.

Figure 6 Guest Check Message

3. Type a **name** to help identify the message, such as 'SalesTips Disclaimer.'
4. Under the 'Footer text' group bar, type the **text** to appear at the bottom of the checkout report or the clock-out chit in 'Line 1' through 'Line 12.'
5. Click **Save** and exit the **Guest Check Message** function.

To print the disclaimer on employee checkout reports:

1. Select **Maintenance > Business > Store**.
2. Select the **Store Settings** tab.

3. Select the **Report Printing** group located at the bottom of the screen.
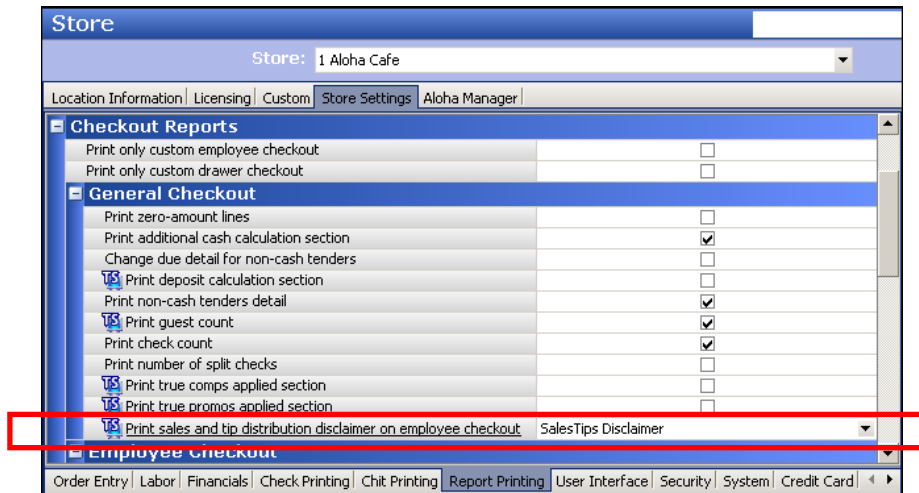
Figure 7 Store Settings Tab - Report Printing Group

4. Under the 'Checkout Reports - General Checkout' group bar, select the **disclaimer message** you created in the Guest Check Message function from the 'Print sales and tip distribution disclaimer on employee checkout' drop-down list.

5. Click **Save** and exit the **Store** function.

To print the disclaimer on employee clock-out chits:

1. Select **Maintenance > Labor > Jobcodes**.

2. Select a **job code** subject to sales and tip distribution from the drop-down list.

3. Select the **Financial** tab.
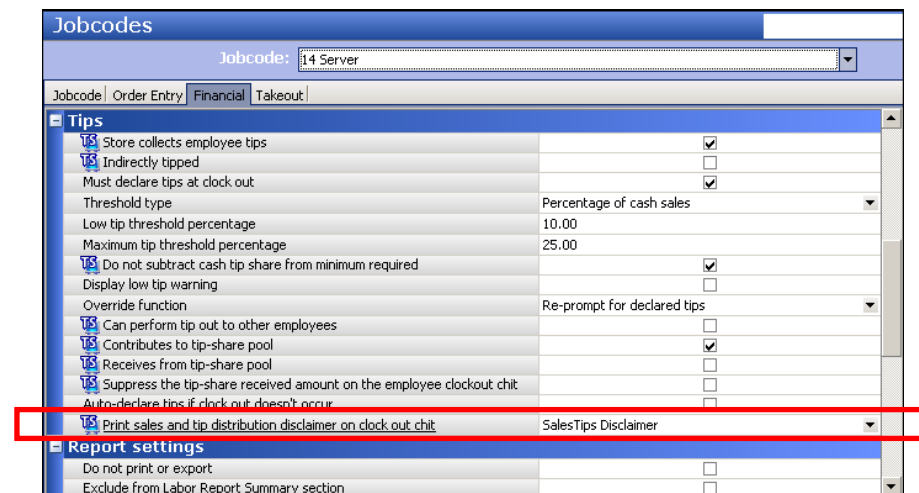
Figure 8 Jobcodes - Financial Tab

4. Under the 'Tips' group bar, select the **disclaimer message** you created in the Guest Check Message function from the 'Print sales and tip distribution disclaimer on clock out chit' drop-down list.

5. Click **Save**.

6. Repeat this **procedure** for all other job codes for which to print the disclaimer on the clock-out chit.

7. Exit the **Jobcodes** function.

Displaying an acknowledgment message at clock in

When an employee clocks out, they may be required to declare their tips; however, it is possible for a manager to later redistribute sales and tips and alter the tip amount received by the employee. To notify an employee of any sales and tip adjustments, create an acknowledgment message to appear when they next clock in.

To create a message to appear at clock in notifying an employee of changes to their sales and tip distribution:

1. Select **Maintenance > Messaging > Clock In Message**.
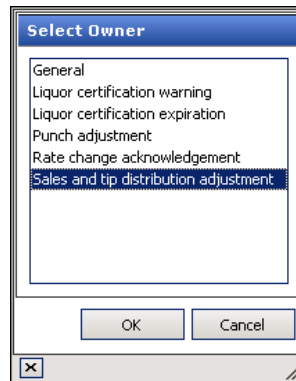
Figure 9 Type - Sales and Tip Distribution Adjustment

2. Click the **New** drop-down arrow, select **Sales and tip distribution adjustment** as the message type, and click **OK**.

Figure 10 Clock In Message

3. Accept the **system assigned number** or click the **ellipsis button (…)** next to 'Number' to display the Number Assignment dialog box, from which you can choose an **alternate number.**

4. Under the 'Settings' group bar, type a **name** for the sales and tip electronic acknowledgment message, such as 'Sales and Tip Adjust.'

5. Under the 'Clock in message' group bar, type the **text** to appear as the header on the clock-in message in 'Line 1' through 'Line 5.' For example, 'Be advised that your sales and tip amounts have changed.'

6. Click **Save** and exit the **Clock In Message** function.

To enable a job code to receive the acknowledgment at clock in:

1. Select **Maintenance > Labor > Jobcodes**.

2. Select a **job code** for which the message should appear when sales and tip distribution amounts change from the drop-down list.
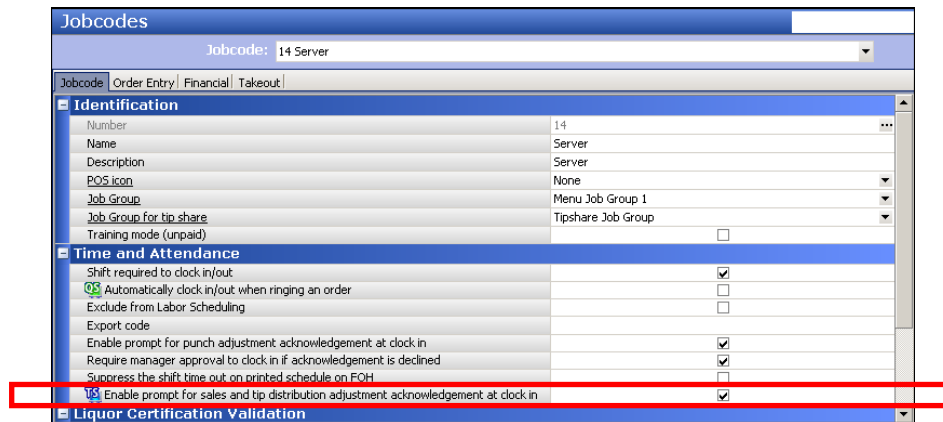
Figure 11 Jobcodes - Jobcode Tab

3. Under the 'Time and Attendance' group bar, select **Enable prompt for sales and tip distribution adjustment acknowledgment at clock in** to display the prompt when the employee clocks in on the next business day.

4. Click **Save**.

5. Repeat this **procedure** for all other job codes for which to print the disclaimer.

6. Exit the **Jobcodes** function.

Refreshing the data

After all settings are in place in Aloha Manager, you must 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 Sales and Tip Distribution

Sales and tip distribution occurs automatically, when you create and manage teams for sales and tip distribution, at the close of each check, regardless if the check is serviced by a shift team or a check team. Automatic distribution helps lower the need for back office adjustment of declared tips as a result of more accurate declaration when clocking out; however, the automatic distribution can only do an equal distribution among the employees. If you need to redistribute the sales and tip, you can do so either from the FOH or the BOH, based on your needs and your configuration.

- Use the FOH distribution function for current day activity when you have changes to a team and need an equal distribution.
- Use the BOH distribution function for both current day, if enabled, and previous days, as many times as needed until the payroll end date. You can stipulate to do the redistribution by a designated percentage or equally among all employees on the team. When you redistribute a check on the next business day or after an employee on the team has already clocked out, the system corrects the reported sales and tip amounts, but you need to access Edit Punches to change the declared tips for each employee on the team.

As a best practice and if at all possible, it is best if the final distribution of the sales and tip for each check is complete and correct before your employees clock out and declare their tips for the day. This reduces the number of corrections to declared tips that have to be done later using the Edit Punches function.

Perform the following procedures, as needed:

- "Creating a shift or check team" on page 21.
- "Editing or removing a shift or check team" on page 26.
- "Viewing the details of a team" on page 29.
- "Viewing an inactive team" on page 32.
- "Performing sales and tip distribution from the FOH" on page 34.
- "Performing sales and tip distribution from the BOH" on page 39.

Managing teams

You must first assign employees to a shift or check team before the system can automatically perform sales and tip distribution for checks owned by the team. Typically, the a.m. manager and the p.m. manager create shift teams made up of employees who work an entire shift together, versus creating teams ahead of time for the entire day. A manager creates a check team when a group of employees work a single table, such as a large group where you combine one or more tables and assign two or more servers to work in cooperation with each other for the duration of the check. An employee must start the check before a manager can create the check team.

An employee must have order entry capability to be eligible for assignment to a team and the employee must be either scheduled to work or already on the clock. The function you use to create teams is only available on the FOH. Once you create a team, the system offers the flexibility of adding or removing employees from the team, as needed. Once every employee on a team clocks out, the system automatically removes the team.

Creating a shift or check team

For the system to automatically perform the sales and tip distribution, you must first create your daily shift or check teams. Create a shift team if you have a team of bartenders or servers for which you need to distribute all checks opened by one of the team members to all members of the team. Create a check team, if you have several employees servicing a large party and the employees also have their own individual tables.

1. Using the FOH terminal, touch **Functions > Special Functions > Financial** to access the first page of the Financial screen and then touch the **double down arrows** to access the second page.
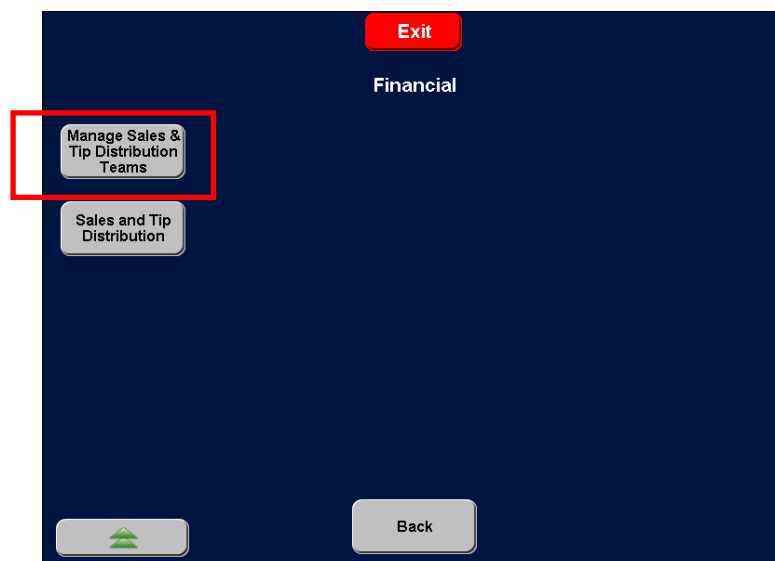
Figure 12 Manage Sales and Tip Distribution Button

2. Touch **Manage Sales & Tip Distribution Teams.**

If no teams exist, the screen is blank. If there are existing teams, the screen lists all of the shift and check teams available.
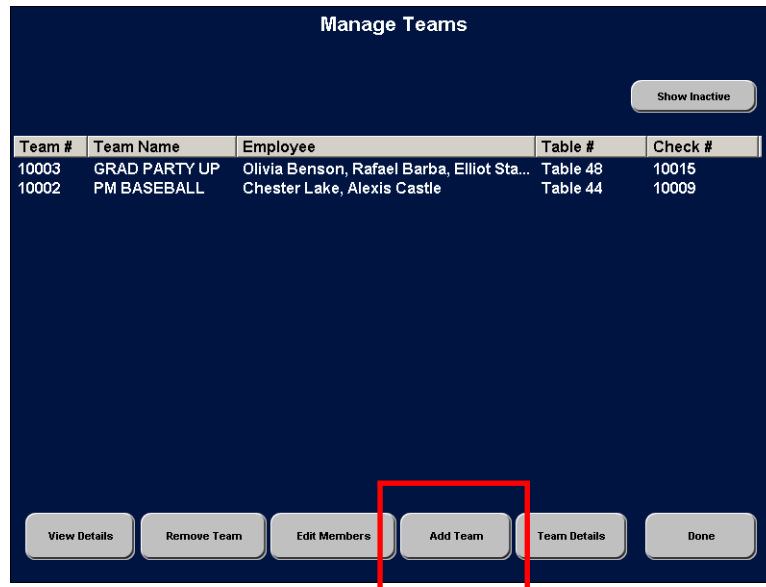
Figure 13 Creating a Team

3. Touch **Add Team**. The Enter Name for Team screen appears.
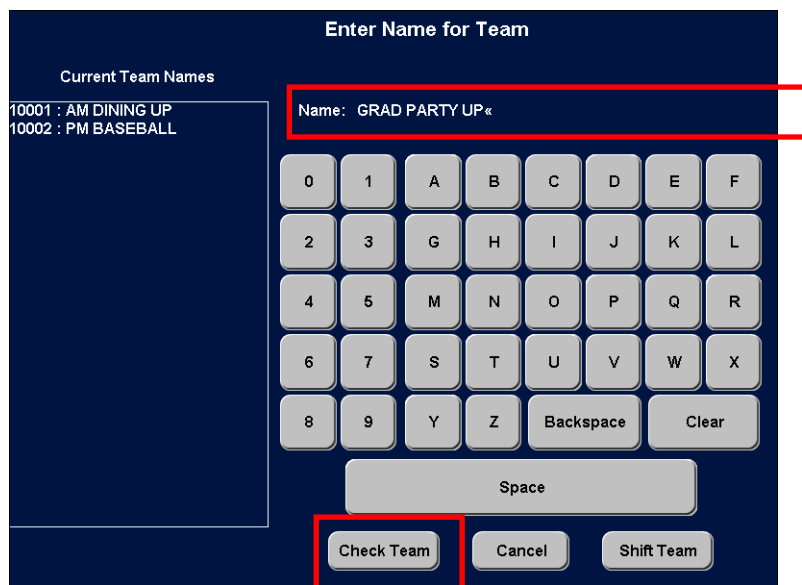
Figure 14 Enter Name for Team Screen

4. Enter a **team name**, up to 15 characters, including spaces. For example, for a check team working a graduation party using the upstairs bar and dining area, type 'Grad Party Up.'

> 💡 **Tip:** You must enter a name; the name cannot be left blank. Also, duplicate team names are not allowed.

The system assigns a unique five-digit number to the team.

5. Touch **Shift Team or Check Team** to determine the type of team you are creating.

If you want to create a team of bartenders or servers where you need to distribute all checks opened by one of the team members to all members of the team, touch Shift Team. The Edit Members screen appears. Continue to step 7.

If you have several employees servicing a large party and the employees also have their own individual tables, touch Check Team. The Select Open Check screen appears listing checks not already assigned to a shift or check team.

Figure 15 Selecting an Open Check for the Team

6. Touch **one or more open checks** and then touch **Done**. If you select a check that is part of a table with multiple split checks, the system assigns all checks to the team. The Edit Team Members screen appears.

Figure 16 Selecting Team Members

7. Touch the **employee names** in 'Available' and then touch **>>** to move the employees to 'Included.' You can select multiple employee names at a time.

Whether creating a shift or check team, the employees appear in 'Available' if (1) the employee has order entry capability and they are clocked in to the system, or, (2) the employee is scheduled to work today using either the basic labor scheduler available in the Aloha POS system or Back Office (NBO), and (3) the employee is not currently assigned to a shift or check team. You cannot add an employee to the team if the employee is already assigned to another team; you must remove the employee from the first team prior to adding the employee to the new team.

8. Touch **OK** to save the team and return to the Manage Teams screen.
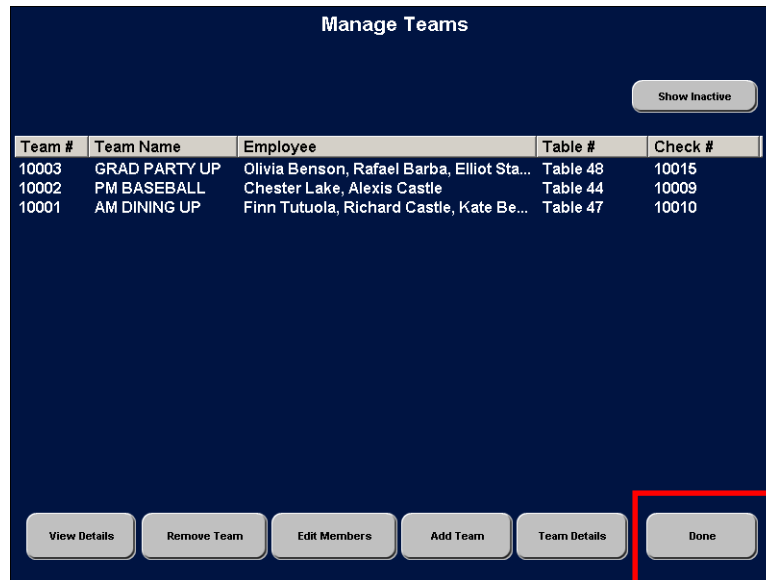
Figure 17 Manage Teams Screen

9. Touch **Done** to exit the Manage Teams screen.

10. Touch **Exit** to exit the Financial screen.

11. Touch **Exit** to return to the Main Menu screen.

> ● **Tip:** You must create teams as they are needed, per shift. If an employee will be on two teams, such as an AM team and PM team, in one day, you must remove the employee from the first (AM) team prior to assigning to the second (PM) team.

Editing or removing a shift or check team

You can add or remove an employee from a team based on your changing business needs. You can also remove a team completely, if needed.

1. Using the FOH terminal, touch **Functions > Special Functions > Financial** to access the first page of the Financial screen and then touch the **double down arrows** to access the second page.
2. Touch **Manage Sales & Tip Distribution Teams** (see Figure 12.)
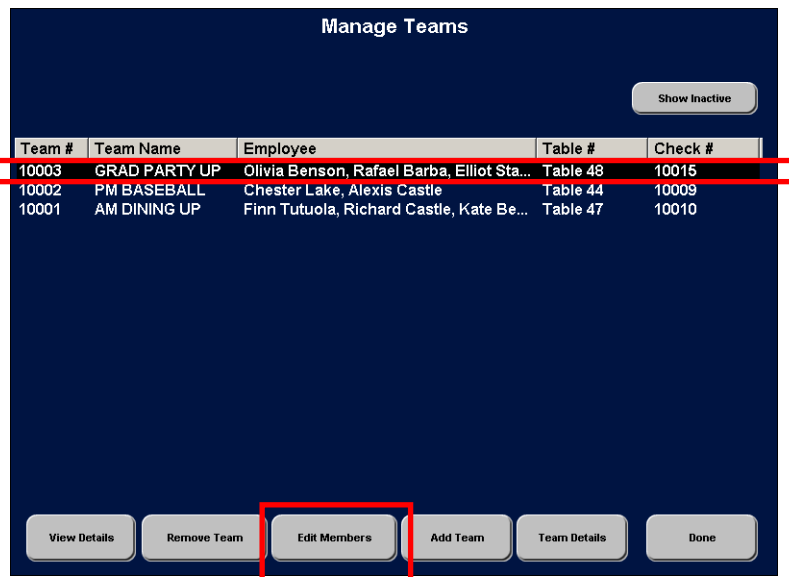
Figure 18 Editing a Team

3. Touch the **team name** in the list. To add or remove an employee, continue to **step 4**. To delete the team, continue to **step 8**.

4. Touch **Edit Members**. The Edit Team Members screen appears.
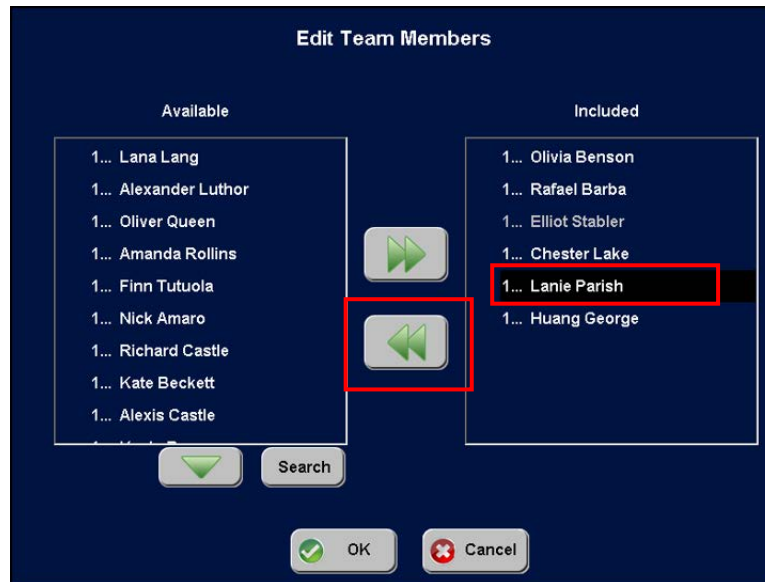
Figure 19 Removing an Employee from the Team

5. Touch the **employee name to remove** in the 'Included' list box and then touch **<<** to move the employee to the 'Available' list box.
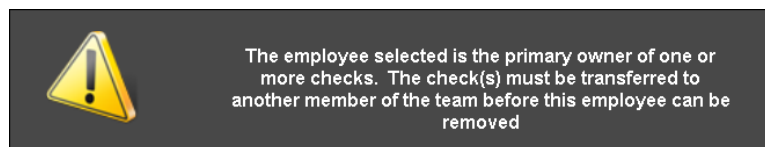
Figure 20 Primary Owner of Check Error Message

If the employee is the financial owner of the check, an error message appears, 'The employee selected is the primary owner of one of more checks. The check(s) must be transferred to another member of the team before this employee can be removed.'

If the employee is not the financial owner of the check, the system automatically removes the employee from the team. The employee keeps their portion of the sales up to the time they are

removed from the team, and will not share in the distribution of any new checks started by the team from this point forward.
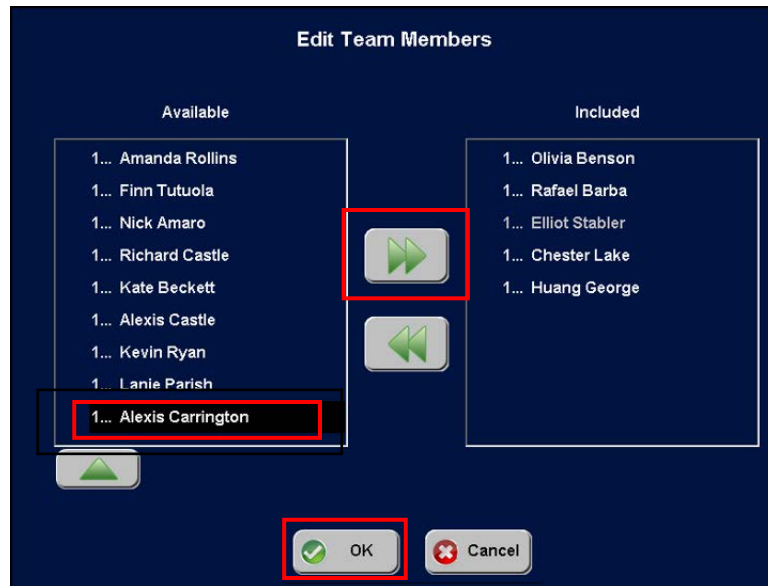
Figure 21 Adding a New Member to the Team

6. To add an employee to the team, touch the **employee name** in the 'Available' list box and then touch **>>** to move the employee to the 'Included' list box.

7. Touch **OK** to save the changes to the team and return to the **Manage Teams** screen. Continue to **step 10**.

8. Touch **Remove Team** to delete the team. A confirmation message appears.
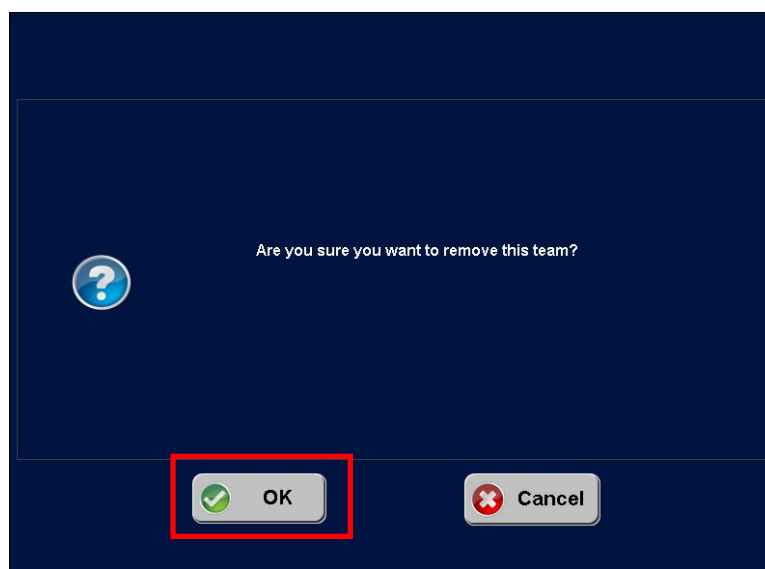
Figure 22 Removing a Team Confirmation Message

9. Touch **OK** to approve the removal of the team.
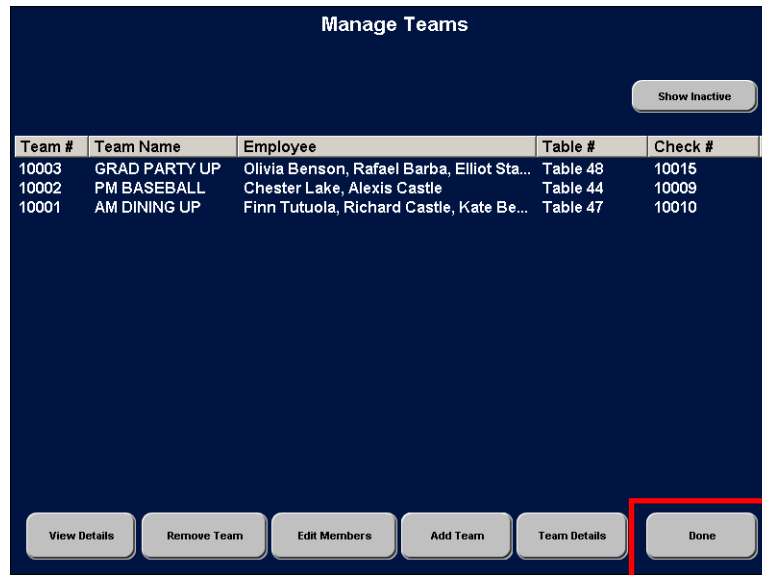
Figure 23 Team Deleted from System

The team no longer appears on the Manage Teams screen.

10. Touch **Done** to exit the Manage Teams screen.

11. Touch **Exit** to exit the Financial screen.

12. Touch **Exit** to return to the Main Menu screen.

Viewing the details of a team

During a shift change, as the new manager coming on duty, you may want to review which employees are assigned to a particular team, particularly if a large party is seated, and to get an idea of the status of each active team.The system provides two buttons that allow you to view details

regarding your teams. You can choose to view a single team, or get a snapshot view of all active teams.

1. Using the FOH terminal, touch **Functions > Special Functions > Financial** to access the first page of the Financial screen and then touch the **double down arrows** to access the second page.

2. Touch **Manage Sales & Tip Distribution Teams**. The Manage Teams screen appears.
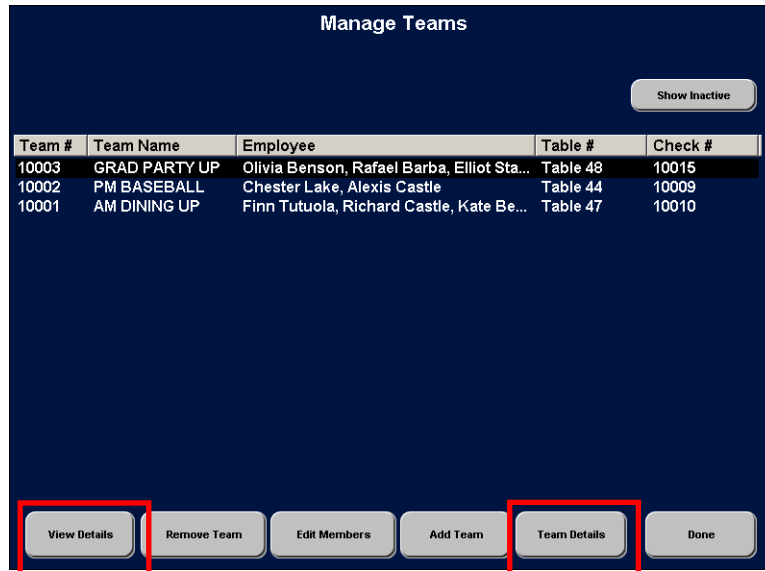
Figure 24 Manage Teams Screen

3. To get a snapshot view of all currently active teams, touch **Team Details**.

Figure 25 Team Details Screen

    a. To view more teams, touch the **double down arrows** to view more teams and the **double up arrows** to return to the first team.

    b. Touch **Done** to return to the Manage Teams screen.

4. To see the details about a specific team, touch the **team name** in the list, then touch **View Details** The system provides the team name, team number, the type of team, the list of employees assigned to the team, and the checks they are currently working.
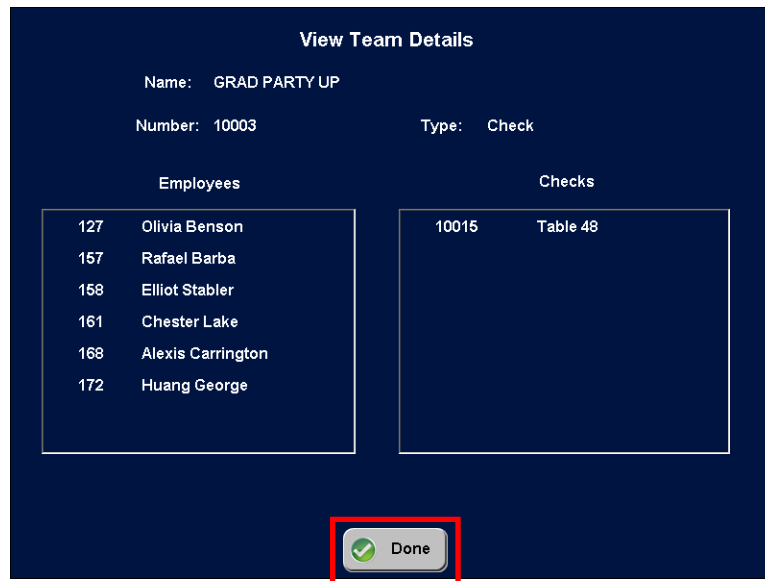
Figure 26 View Team Details Screen

If the employee name appears in red font, this indicates that the employee clocked in under a job code for which the configuration of tip share does not match the other members of the team.

If an employee assigned to the team does not appear in the list, this indicates the employee is no longer on the clock.

Touch **Done** to return to the Financial screen.

5. Touch **Exit** to return to the Working with Tables screen.

6. Touch **Exit** to return to the floating logo screen.

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Viewing an inactive team

The system offers you the ability to view teams whose checks are closed and whose members have all clocked out for the day, referred to as Inactive teams. This is helpful when reviewing the teams created for that business day. Any teams you remove from the system also appear when using this function.

1. Using the FOH terminal, touch **Functions > Special Functions > Financial** to access the first page of the Financial screen and then touch the **double down arrows** to access the second page.

2. Touch **Manage Sales & Tip Distribution Teams**. The Manage Teams screen appears.
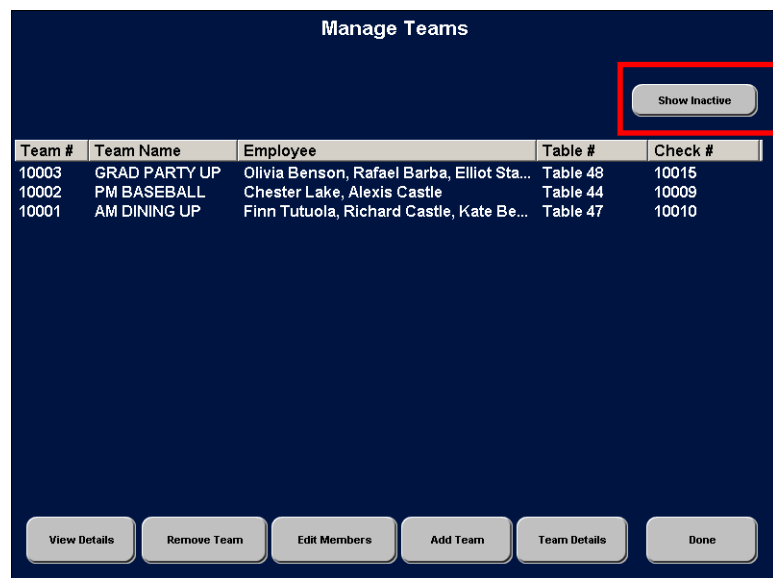
Figure 27 Show Inactive Button

3. Touch **Show Inactive**.

The Show Inactive button acts as a toggle, switching between the active and inactive teams.
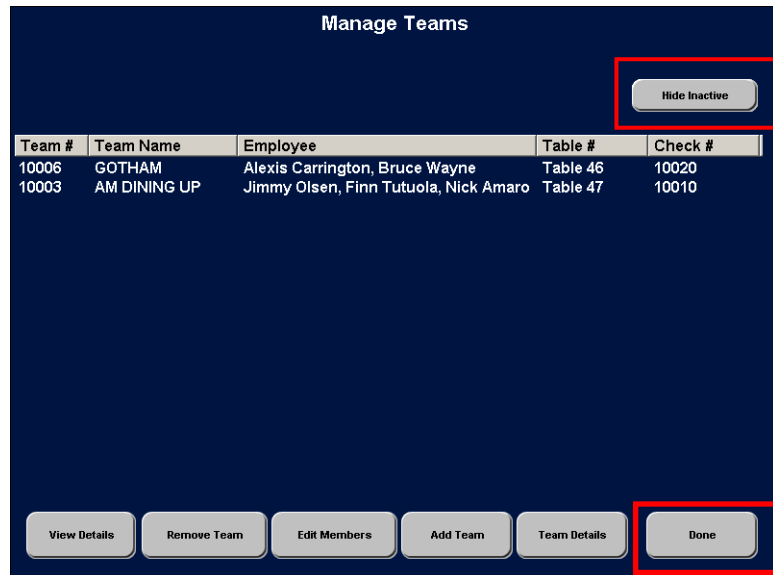
Figure 28 Hide Inactive Teams

If inactive teams are available, they appear in the list on this screen. If there are no inactive teams, the list is blank.

4. Touch **Hide Inactive** to return to the active teams.

5. Touch **Done** to return to the Financial screen.

6. Touch **Exit** to return to the Working with Tables screen.

Performing sales and tip distribution

There are three ways in which to perform sales and tip distribution: Automatically, manually from the FOH, and manually from the BOH.

Automatic sales and tip distribution occurs at the time an employee closes a check and requires no action on your part. The system verifies the primary owner of the check. If the primary owner of the check is part of a team, the distribution of the sales and tip occurs automatically.

If you discover later that another employee also assisted with the check, or an employee on the team did not assist with the check at all, you can perform a manual redistribution from the FOH and make the necessary changes to the team at that time. Again, this distribution is an equal split of the sales and tip among each member of the team.

If you need to split the sales and tip distribution of a check using percentages, you must perform a manual redistribution from the BOH. Also, it may be necessary to wait and perform the redistribution on the following business day, if the system does not allow the redistribution for current day checks from the BOH.

Performing sales and tip distribution from the FOH

You can perform redistribution from the FOH for the current day only, as many times as needed. The system distributes the checks equally among the employees on the team.

1. Using the FOH terminal, touch **Functions > Special Functions > Financial** to access the first page of the Financial screen and then touch the **double down arrows** to access the second page.
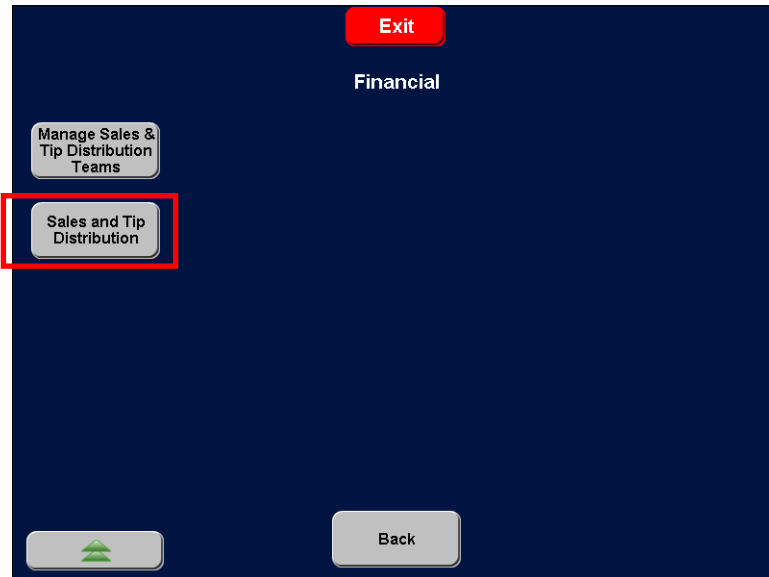
Figure 29 Financial Screen

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2. Touch **Sales and Tip Distribution**. The Select Check(s) To Distribute screen appears with checks from all revenue centers appearing in the list. To filter by revenue center, touch Revenue Center to display a screen from which you can select a specific revenue center.
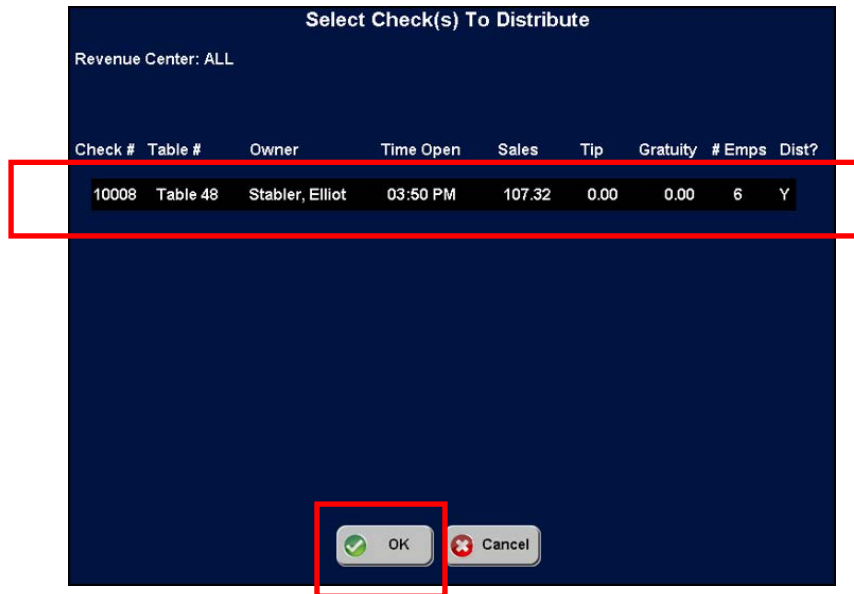
Figure 30 Select Check(s) to Distribute Screen

3. Touch **one or more checks** and then touch **OK**. The Select Employee(s) for Distribution screen appears with the employees from the last distribution appearing in the 'Included' list box. Using this screen, you can add or remove employees. For example, you may not have included an

employee on the team, but later discover the employee assisted the team. You can add the employee here, to share in the sales and tip distribution.

Figure 31 Select Employee(s) for Distribution Screen

4. Touch the **employee name(s)** in the 'Available' list box and then touch the **double right arrows** to move the employee(s) to the 'Included' list box. All employees who are currently clocked in appear in the list. It may be necessary to use the up and down arrows to locate the employee name(s) in the list.

If there are a lot of employees clocked in, touch **Search** to make locating an employee easier.
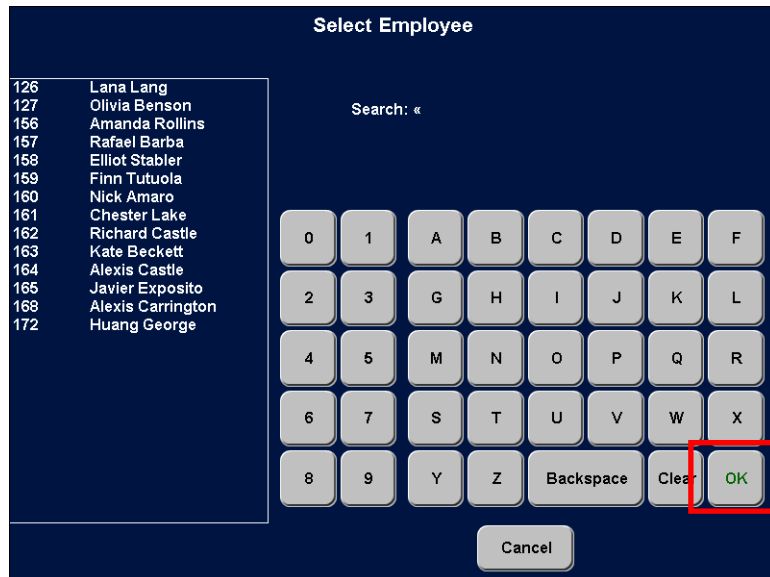
Figure 32 Select Employee Search Screen

You can also filter your search criteria by typing the first letter of the employee name. For example, type 'C' to display only employees whose first or last name begins with a 'C.'
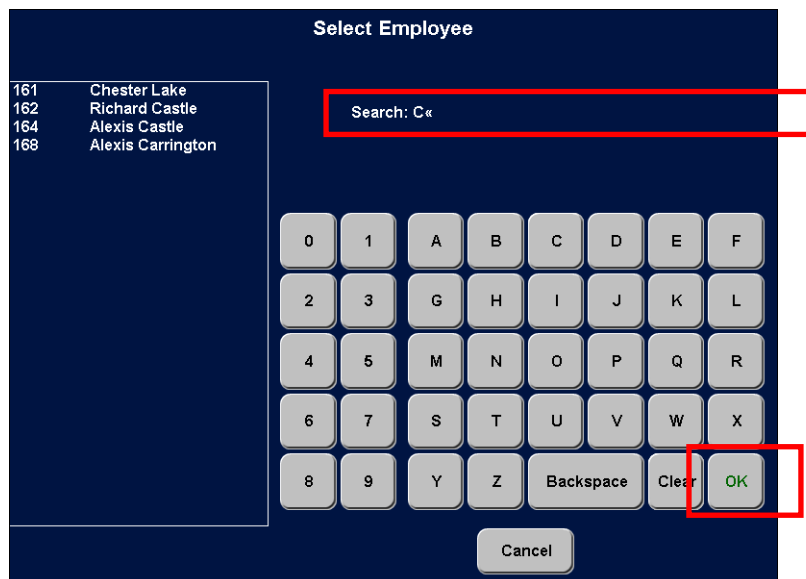
Figure 33 Select Employee Search Screen Using Letter

Touch the **employee name** and then touch **OK** to return to the Select Employee(s) for Distribution screen.

5. Touch **OK** again, after your employee selections are complete. The Sales and Tip Distribution screen appears.

Figure 34 Sales and Tip Distribution Screen

The example in Figure 34 illustrates how the system distributes overages in equal amounts starting with the top employee and moving down until the distribution is complete.

6. Touch **OK**.

Figure 35 Select Check(s) to Distribute Screen

The Select Check(s) To Distribute screen appears.

7. If the sales and tip distribution of this check is complete, touch **Cancel** to return to the Financial screen. Continue to **step 10**.

8. To perform a redistribution, touch the **check again** and then touch **OK**.

   a. Repeat the **procedure** to add or remove employees.

   b. Touch **OK** when selection is complete. The Sales and Tip Distribution screen appears (See Figure 34).

   c. Touch **OK** to return to the Select Check(s) To Distribute screen.

   d. Repeat the distribution as many times as necessary.

9. Touch **Cancel** to return to the Financial screen.

10. Touch **Exit** to return to the Working with Tables screen.

11. Touch **Exit** to return to the floating logo screen.

Performing sales and tip distribution from the BOH

Depending on the configuration, you can perform redistribution from the BOH for both current and previous days, or only for previous days, as many times as needed until the payroll end date. You can stipulate to do the redistribution by a designated percentage or equally among all employees on the team. When you redistribute a check on the next business day, the system corrects the reported sales and tip amounts, but you need to access Edit Punches to change the declared tips for each employee on the team.

1. Select **Functions > Sales and Tip Distribution**. The Sales and Tip Distribution dialog box appears.
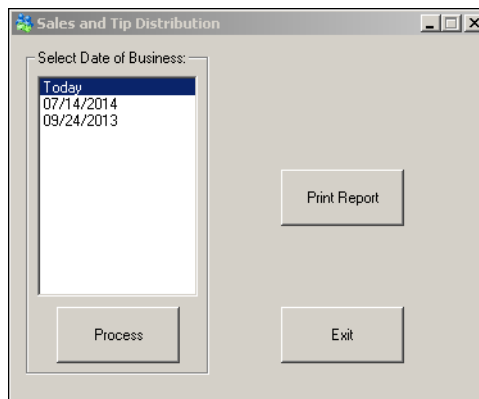
Figure 36 Sales and Tip Distribution Dialog Box

2. Select a **single date to process** in this list. You cannot select multiple dates. 'Today' only appears in the list if your site is able to perform a redistribution for the current date from the

BOH. You can perform the redistribution for the current date from the FOH, if the distribution is equal among all employees on the shift or check team.

> **Tip:** If you need to redistribute the sales and tip for a check using varying percentages, it is necessary to use the BOH Distribute Sales and Tip function. If you cannot perform a redistribution of a check for today using the BOH function, it is necessary to wait until the next business day.

3. Click **Process**. The Sales and Tip Distribution Check Selection dialog box appears with all closed checks for the selected date.
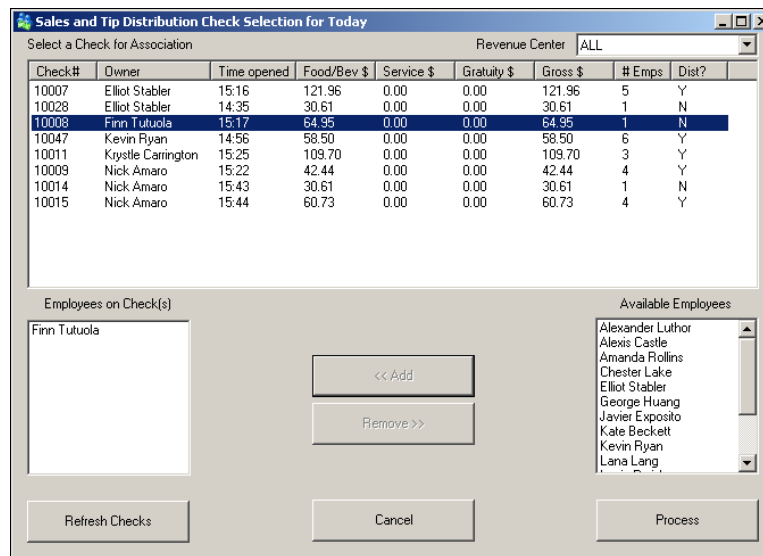
Figure 37 Sales and Tip Distribution Check Selection Dialog Box

The date of the selection appears in the title bar of the dialog box, and checks from all revenue centers appear in the list.

4. Select a specific **revenue center** from the drop-down list, if you wish to filter the list by revenue center.

5. Click a **column heading** to sort the checks by that particular column. Click the **same column** again to sort the column in reverse order. The following columns appear on the screen:

Check # — The check number assigned to the check when it was entered into the FOH.

Owner — The owner of the check, which is the employee who started the check, or the employee who received transfer of the check.

Time Opened — The time the owner started the check.

Food/Bev $ — The total sales, after tax, for the check.

Service $ — The automatic gratuity added to the check.

Gratuity $ — The non-cash tips applied to the check, such as credit card tips.

Gross $ — The gross sales amount of the check based on the following calculation: Food/Bev $ + Service $ + Gratuity $.

 # Emps — The number of employees receiving credit for the distribution.

Dist? — The status of the check. 'Y' indicates you already distributed the tips and sales for the check. 'N' indicates you have not. If you reopen a check you already distributed, the Dist? status resets to 'N.'

> **Tip:** The Refresh Checks button only appears if you select 'Today' as the available date for distribution. Click Refresh Checks to update the list of checks generated from the FOH and return to the default sorting order of Check #.

6. Select one or more **checks(s)** to distribute fromt 'Select a Check for Association.' To select more than one check, hold down **CTRL** and select the **individual checks**. To select more than one consecutive check, select the **first check**, hold down the **Shift** key, and select the **last check**. The employees assigned to the check appear in the 'Employees on Check(s)' list. box.

7. To add another employee to the distribution, select an **employee** from the 'Available Employees' list box, and click **Add**. The employee appears in the 'Employees on Check(s)' list box.

    To remove an employee from the distribution, select the **employee** in the 'Employees on Check' list box, and click **Remove**. The employee appears in the 'Available Employees' list box.

8. Continue to **add and remove employees**, as necessary.

Figure 38 Included Employees

9. When the employees to include in the distribution are correct, click **Process**. The Sales and Tip Distribution dialog box appears with the checks distributed equally among the selected employees. If you selected more than one check, each column represents a total distribution from all checks.

Figure 39 Distributing by Equal Split

10. To distribute the checks based on a distribution percentage, select **By Percentage** and then click inside the **distribution percentage amount** and type the **percentage to allocate** to the employee. Repeat for each employee until the total distribution equals 100%.

Figure 40 Distributing by Percentage

> **ⓘ Note:** ***Distribution Rule:*** The system allows you to enter percentages greater than 100. For example, if you enter '40', '40', and '40' for three employees, each value is divided into the total to arrive with a calculated percentage of 33.3% of the total tips and sales for each employee (100%/3=33%). Similarly, if you enter '20', '20', and '10', the system calculates a total of 50%, then divides the individual values into the total to calculate each line proportionately (20/50=40%, 20/50=40%, 10/50=20%. 40% + 40% + 20% = 100%). In the event the calculation results in leftover pennies unequal to the number of employees, the system assigns the overage in equal amounts beginning with the top employee.

11. Click **Review Changes** to update and review the distribution.

12. Click **Save** to return to the Sales and Tip Distribution Check Selection dialog box. The information on the screen updates to reflect your changes.
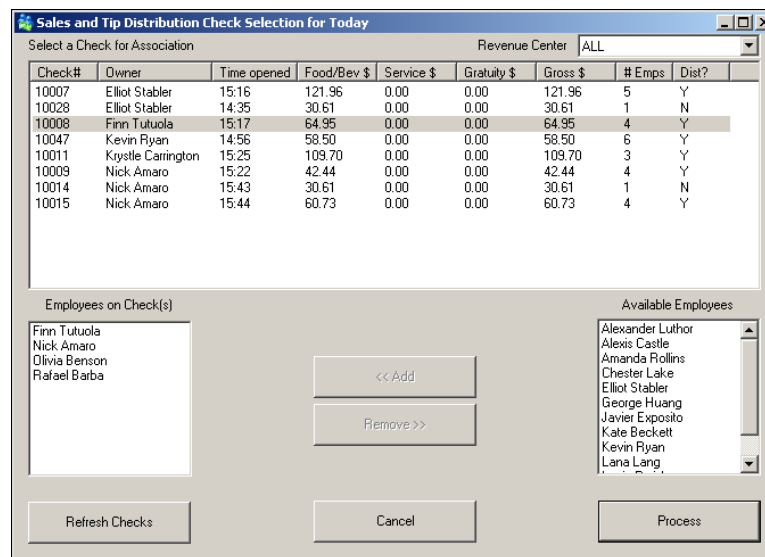
Figure 41 Distribution Completed

13. Click **Cancel** to exit.

Checking out and declaring tips at clock out

The system automatically performs the distribution of the sales and tip at the time a team employee closes a team check. During the checkout procedure, an employee checkout report prints, making the employee aware of the total sales, charge tips, gratuity, and tip-share contribution for their own tables, if any, and the same information for those tables in which the employee worked in cooperation with a team to provide service.

```
------------------------------------------
     **** Team Sales Detail ****

EMPLOYEE:
Sales                          134.50
Charge Tips                      0.00
Gratuity                         0.00
Tip-share Contr                  1.35


TEAM:
Sales                          100.00
Charge Tips                     10.00
Gratuity                         0.00
Tip Share Contr                  1.00


TOTAL:
Sales                          234.50
Charge Tips                     10.00
Gratuity                         0.00
Tip Share Contr                  2.35


    **** Sales and Tip Disclaimer ****
          Please be advised that
    Sales and Tip amounts are subject
      to change as a result of further
         Sales & Tip Distribution
```

The 'EMPLOYEE' section details the sales, credit card tips, and tip-share contribution for which the employee is the primary check owner, and not part of a team. If the employee job code does not contribute to a tip-share pool, the 'Tip-share Contr' row does not appear on the report.

The 'TEAM" section details the sales, credit card tips, and tip-share contribution amounts based on checks for which the employee worked in cooperation as a team to provide service and the sales and tips were either automatically or manually distributed among the team members. If the employee job code does not contribute to a tip-share pool, the 'Tip-share Contr' row does not appear on the report.

Figure 42 Employee Checkout Report Example

The clock-out chit shows a consolidated view of the same information, to assist an employee during the tip declaration process.

```
              Employee Clock Out
Unit #10                          04/06/15

Elliot Stabler                    08:27 PM

Job: Server
Time in: 10:15 AM
Time out: 08:15 PM
Hours this shift: 09:00
Hours this week: 25:00
Sales:  $330.45
Tipshare:  $10.00
Carry Over Tips: $0.00
Declared Tips: $10.00
Charged Tips: $20.00
Wage Gratuities $11.00

        **** Sales and Tip Disclaimer ****
              Please be advised that
    Sales and Tip amounts are subject to change as a
        result of further Sales & Tip Distribution
```

Figure 43 Employee Clock-Out Chit

A sales and tip distribution disclaimer is helpful on both the checkout report and the clock-out chit, to alert an employee that the sales and tip amounts may change from what appears on these documents due to further sales and tip distribution.

📖 **Reference:** Refer to the Custom Checkout Report Feature Focus Guide, Tip Share Distribution Feature Focus Guide, and the Tip Declaration Feature Focus Guide for more information.

💡 **Tip:** If necessary, you can use the Edit Punches function to change the tip declaration for an employee.

Reporting Sales and Tip Distribution

Use the reports found within the Aloha POS system to help manage the sales and tip distribution from your employees. The Aloha front-of-house (FOH) reports include data for the current day only. The back-of-house (BOH) reports can include data for the current day and/or prior days.

Running the employee daily sales and tip distribution report

You can view and print your distribution amounts and recipients with the Employee Daily Sales and Tip Distribution report. You can run this report while you are in the Sales and Tip Distribution function by selecting a date and clicking Print Report on the Tip and Sales Distribution screen, or you can choose to run it from the Reports menu. Configure the report to sort by server or check. You must have the appropriate security role to run this report.

To view or print the Sales and Tip Distribution report:

1. Select **Reports > Aloha Point-of-Sale > Employee > Sales and Tip Distribution**. The Sales and Tip Distribution Report dialog box appears.
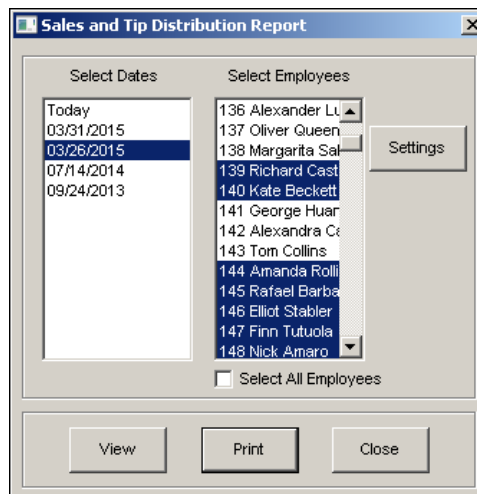
Figure 44 Sales and Tip Distribution Report Dialog Box

2. Select the **date** or **date range** for your report.
3. Select the **employee** or **employees** for your report.

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4. Click **Settings**. The Sales and Tip Distribution Report Settings dialog box appears.

Select Server to sort the report by employee number. The report lists the employee and all associated checks for that employee.

Select Check to sort the report by check. The report lists all checks for team employees included in the distribution of the sales and tip amounts.
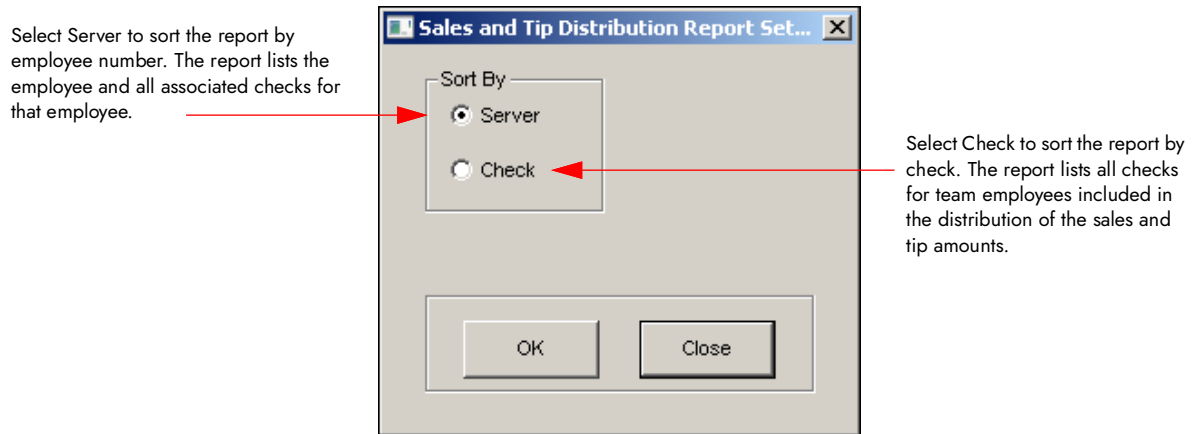
Figure 45 Sorting the Report

5. Select **Server** to sort the report by the employee number for each server who worked on a team, or select **Check** to sort the report by each check worked by a team.

6. Click **OK**. The Sales and Tip Distribution Report dialog box appears.

7. Click **View** to display the report in the Preview Report dialog box, or **Print** to print the report to a local printer. The report prints in landscape format.

8. Click **Close** to close the Preview Report dialog box.

9. Click **Close** to close the Sales and Tip Distribution Report dialog box.

Selecting one day and sorting by server

If you select a single date and sort the report by server, the Employee Daily Sales and Tip Distribution Report sorts by employee number for each server and provides a subtotal for the day (see Figure 46).

Figure 46 Selecting One Day and Sorting by Server Example

Selecting multiple days and sorting by server

If you select several dates and sort the report by server, the Employee Daily Sales and Tip Distribution Report sorts by employee number for each server, and provides a subtotal by employee and by day (see Figure 47).

Figure 47 Selecting Multiple Days and Sorting by Server Example

Selecting one day and sorting by check

Sorting the Employee Daily Sales and Tip Distribution report by check is helpful if an employee is confused about the amount of sales and tips received. The potential exists for a check to be distributed multiple times and the checkout report and clock-out chit may reflect different amounts; the report shows the amounts after the final distribution. For example, from check 10005, Rafael receives $18.34, and Finn and Nick receive $18.33.

Figure 48 Selecting One Day and Sorting by Check Example

Viewing team sales using the server sales report

The Server Sales Report verifies the financial responsibility of a server during a shift. Use the 'Team Sales' option to add team sales, credit card tips, and tip share contribution available from team checks to the report.

To generate a Server Sales Detail report in which you include a team sales section:

1. Select **Reports > Aloha Point-of-Sale > Sales > Server Sales Detail**. The Server Report dialog box appears.

2. Select the **date(s)** to include in the report.

3. Select the **employee(s)** to include in the report, or select **Select All Employees** to include every employee in the report.

4. To include team sales in the report, click **Settings**. The Server Cash Report Settings dialog box appears.
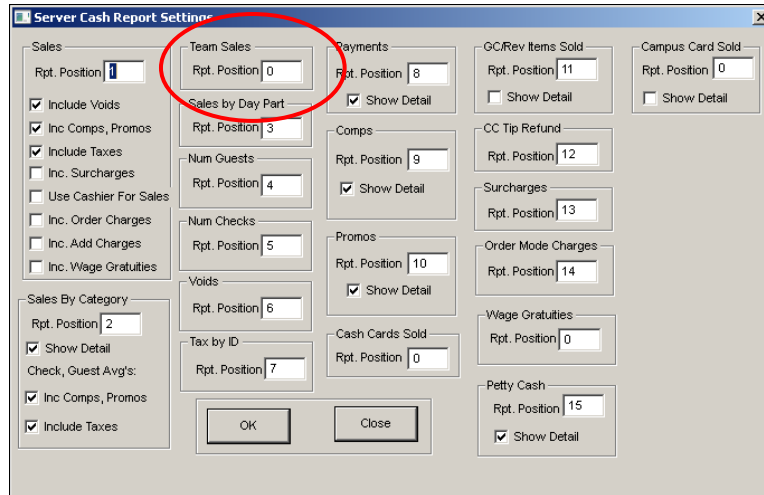

Figure 49 Team Sales Option on Server Cash Report Settings Dialog Box

5. Under 'Team Sales' type a **number** for the report position. Be sure to use a number not already in use on the report.

6. Click **OK**.

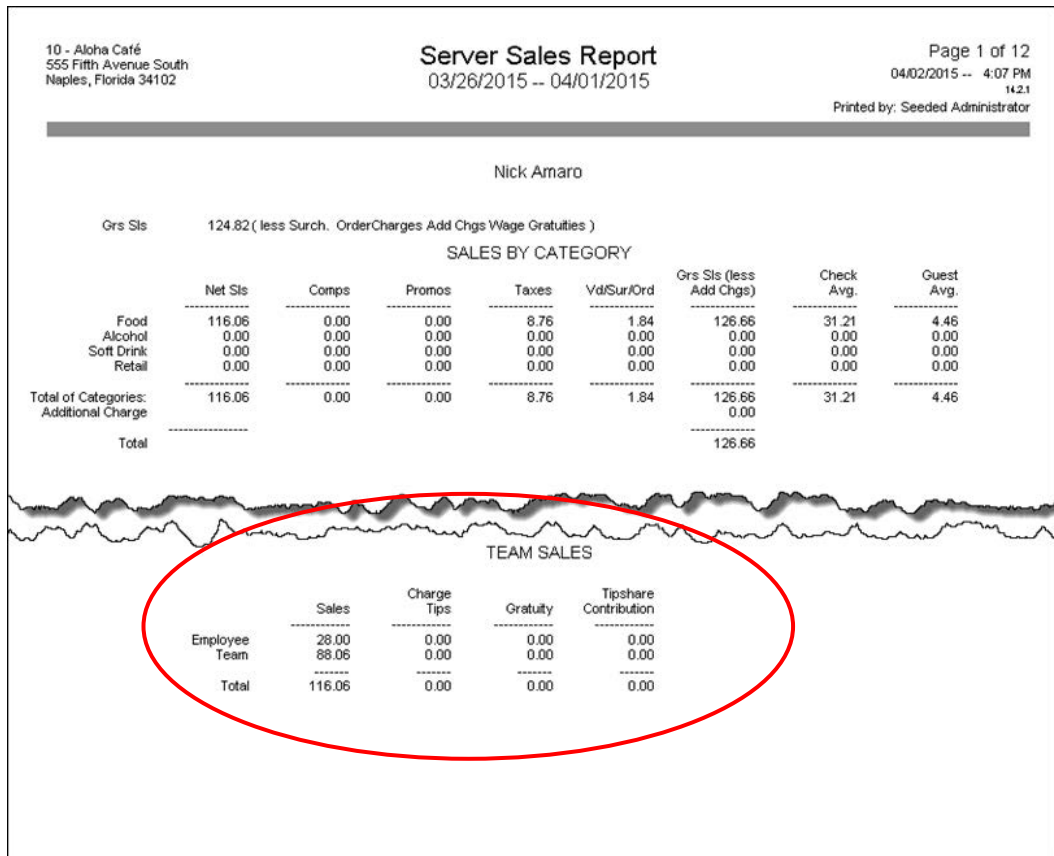7. Click **View**, **Print**, or **Export** to review the report.

Figure 50 Server Sales Report

8. Click **Close** to close the report.
9. Click **Close** to close the Server Report dialog box.

Viewing sales and tip distribution activity using BOH audit report

You can now view transactions related to changes made to shift or check teams using the Audit report. You can also audit transactions related to the distribution of checks using this report.

1. Select **Reports > Aloha Point-of-Sale > Audits**. The Audits dialog box appears.

2. Select a **date** from the 'Select date' drop-down list and click **OK**. The Select Transactions to Audit dialog box appears.
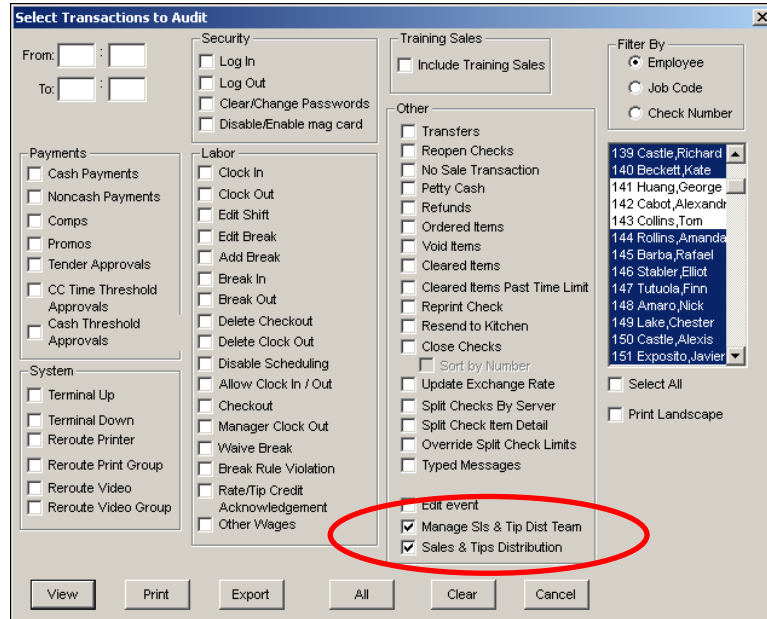

Figure 51 Select Transactions to Audit Dialog Box

3. To view the teams and who created them, select **Manage Sls & Tip Dist Team**.

4. To view information regarding the distributions of checks, select **Sales & Tips Distribution**.

5. Select the **employee(s)** to include in the Audit report

6. Select **Print Landscape**, if necessary.

7. Click **View**, **Print**, or **Export** to review the report**.**

The 'Manage Sales Teams' type shows the employee who created a team.

The 'Sales & Tip Dist' type shows the employee who performed the sales and tip distribution.

Figure 52 Audit Report - Sales & Tip Distribution

8. Click **Done** to close the report.

9. Click **Cancel** to close the Select Transactions to Audit dialog box.

10. Click **Cancel** to close the Select Date of Reprint dialog box.

The following is a comprehensive list of reports impacted by the Sales and Tip Distribution function:

● BOH Sales and Tip Distribution Report

● FOH Server Sales Report

● FOH Sales Report

● BOH Server Sales Report (new settings available)

● BOH Performance Measures Report

● BOH Labor Report

- BOH Tip Income Report
- BOH Employee Tip Report
- BOH Audit Report (new settings available)

Troubleshooting Sales and Tip Distribution

We cover the following troubleshooting topics for the Sales and Tip Distribution feature.

Contributor to tip-share pool configuration does not match

The following message appears when you create a team and select an employee with a job code for which the tip-share contribution configuration does not match the others on the team.
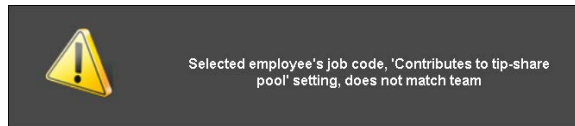

Figure 53 Selected Job Code - Contributes to Tip-Share Pool

If one employee job code (clocked in or scheduled to work) pays tip share, then the job code for all employees on the team must also pay tip share. You cannot create a team with mixed job code configurations with regard to tip-share contribution, either they do, or they do not, contribute, to a tip-share pool.

Employee clock in job code warning message

After team creation, if an employee assigned to a team clocks in to the FOH using a job code that does not contribute to a tip-share pool when the others on the team contribute, a warning message appears, 'You have been assigned to a team that pays tip share, and your current clock in job code does not pay tip share. You will be excluded from the team sales and tip distribution.' The system allows the employee to clock in and an asterisk appears next to the employee name. The employee does not receive a share of the sales and tips.

Unable to save sales and tip distribution changes

If you cannot save your distribution changes when you exit the Sales and Tip Distribution Check Selection dialog box, the FOH may not be running. This only occurs when you select 'Current' as your 'Day range to perform sales and tip distribution.' The FOH terminal should always be running.

No data to report


```
10 - Aloha Café                     Employee Daily Sales and Tip Distribution Report              Page 1 of 1
555 Fifth Avenue South                                   03/31/2015                        04/07/2015 --  2:04 PM
Naples, Florida 34102                                                                                14.2.1
                                                                                         Printed by: Seeded Administrator


                                          No Data To Report
                      **************************  End of Report  **************************
```
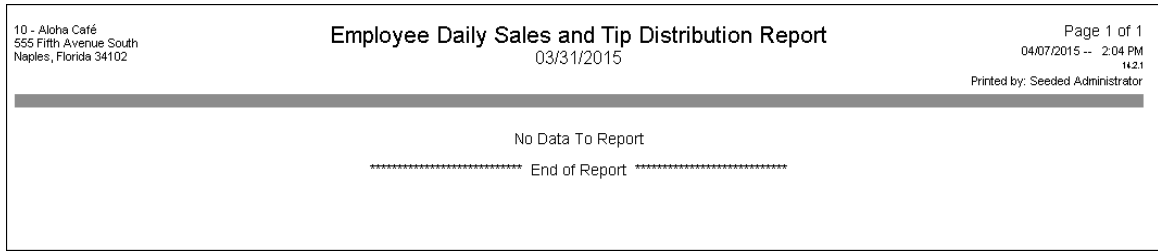
Figure 54 No Data to Report

If 'No Data to Report' appears on the Employee Daily Sales and Tip Distribution report, only a date was selected for the search criteria. You must select at least one employee to generate the report successfully.

Sales and Tip Distribution, 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